

# Warm Handoff Plus



## 1—Review intervention and training materials

- Understand the purpose, use, and benefits of Warm Handoff Plus.
- Review the training toolkit.
- Watch the Warm Handoff Plus video.

## 2—Make decisions for your implementation

### Set scope

- Which transitions will you target for Warm Handoff Plus? Medical assistant to clinician? Clinician to medical assistant? Clinician to educator? Medical assistant to lab? Other?

### Revise workflow

- How will current workflow have to change to accomplish Warm Handoff Plus?
- What are the implications of changing the workflow?
- How will those implications be addressed?
- Will you use the checklist?

### Identify champions

- Who will champion the strategy within each role on the team?

## 3—Customize training for your practice

- Customize the training materials to reflect your decisions.
- Select and/or customize role play scenarios.

## 4—Train team members

- Use staff meetings and huddles.
- Strive for training meetings of at least 15 minutes.
- Use the Warm Handoff Plus video.
- Conduct role play sessions.

## 5—Go live with implementation

- Inform staff of timeline.
  - Go live.
  - Identify good implementors and use them as peer coaches.
- Continue to promote Warm Handoff Plus and encourage its use.
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## 6—Evaluate your progress

### Evaluate effectiveness

- How many miscommunications are corrected during a Warm Handoff Plus?
- What is patient satisfaction with the Warm Handoff Plus?
- What is clinician satisfaction with the Warm Handoff Plus?

### Evaluate implementation success

- How often does the intended Warm Handoff Plus occur?
  - In what percentage of Warm Handoff Pluses is the patient included?
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