



Warm Handoff Plus

AHRQ

Guide to Improving Patient Safety in
Primary Care Settings by Engaging
Patients and Families



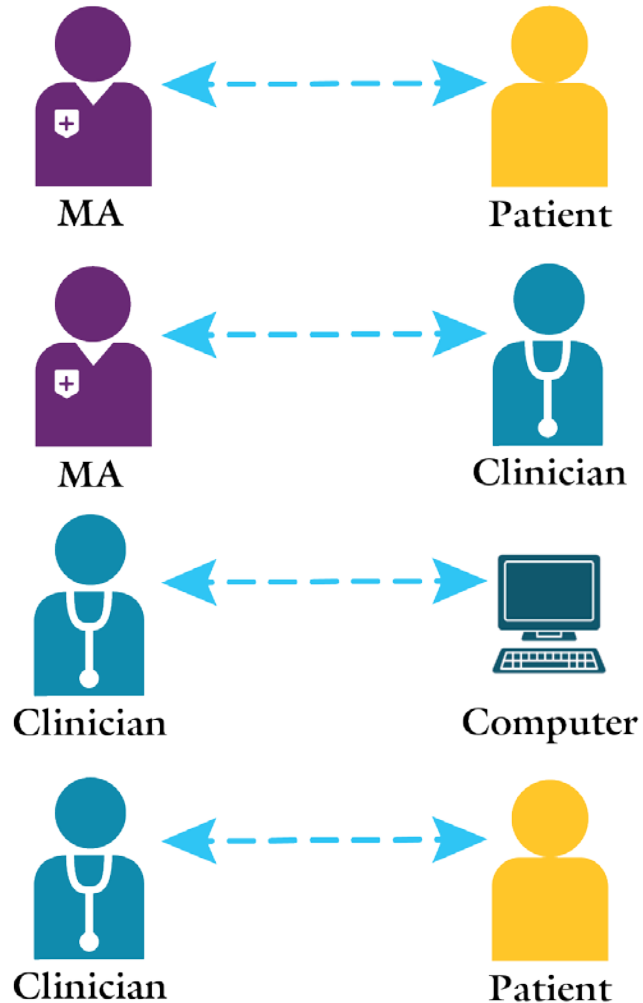
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What is a Warm Handoff Plus?



Why is it important?

Transactional Communications



Collaborative Communications





How can it help me?

- **Improves communication** both with the patient and among the healthcare team
- Makes communication **more efficient**
- **Prevents** errors
- Improves the clinician and patient **relationship**

When should I use it?




- Transitions for Warm Handoff Plus

Customize this slide to match your practice's implementation strategy.

How do I use it?



What tools are available?




Warm Handoff Plus

Role Play Scenario 1


Facilitator Instructions

1. As facilitator, play the role of the clinician.
2. Request a volunteer to play the role of the staff member. The staff member will engage in a Warm Handoff Plus with the clinician.



Checklist: Conducting a Warm Handoff Plus

Present to the Clinician



Design Guide for Warm Handoff Plus

Introduction


In a typical primary care visit, the patient transitions from one member of the health care team to another multiple times, often without team members talking to each other. For example, the patient's visit may start with a medical assistant (MA) who records the patient's chief complaint and vital signs. The patient may then see the clinician for the exam, diagnosis, and plan of care. A nurse or MA may return to the patient to administer testing, treatment, or education. The patient's visit may end with the scheduler and financial staff. In each transition, opportunities arise for breakdowns in communication that may lead to medical errors.

A *Warm Handoff Plus* is a transition conducted in person between two members of the health care team in **front of the patient** (and family if they are present). The Warm Handoff Plus engages the patient as a team member and partner in his or her care. The patient hears what is discussed, reinforcing his or her understanding of the diagnosis and plan of care and allowing an opportunity to correct or clarify the information exchanged. A Warm Handoff Plus engages the patient through structured communication and improves patient safety by helping prevent communication breakdowns.

To adopt the Warm Handoff Plus, many primary care practices will need to adjust their current workflow. This design guide provides step-by-step instructions and examples to help primary care practices design a workflow that supports the use of a Warm Handoff Plus.

How To Use This Design Guide

This design guide provides a systematic approach to adopting the Warm Handoff Plus as standard in your practice. Every primary care practice is different. Thus, the effort required to implement the Warm Handoff Plus will differ for each practice. This guide contains a step-by-step pathway for implementation. Depending on your practice's characteristics, some steps may not apply. Adjust the steps and how you accomplish each one as needed to fit your practice.



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information about the scenario. Page

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you like to add?

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Scenario 1

- Handoff from MA to clinician
- Mr. Thomas – 78 year-old-male with uncontrolled hypertension and knee pain
- Visiting for knee pain, which is keeping him from exercising
- Temp 98.7 F, BP 152/91, weight 173 lb, up 2 lb
- PHQ 9 depression screening score of 8
- Medications:
 - Hydrochlorothiazide (Admits to not taking as prescribed because it makes him pee a lot)
 - Atorvastatin
 - Low-dose adult aspirin



Scenario 2

- Handoff from MA to clinician
- Mrs. Sanchez – 63-year-old female with type II diabetes
- Here for annual physical
- Temp 98.6 F, BP 137/81, weight 146 lb, down 10 lb, BMI of 25
- Weight loss attributed to daily walking, more vegetables, fewer sweets
- HbA1C of 6.5
- Taking metformin 1,000 mg QD after dinner as prescribed, no other meds



Scenario 3

- Handoff from MA to lab technician
- Mr. Bauman— 61-year-old male with history of hypertension
- Here for annual physical
- Orders
 - Flu vaccine
 - CBC
 - Lipid panel
 - UA



How will we evaluate it?

- Corrected miscommunications
- Satisfaction
- Reported use:
 - Warm handoff
 - With patient

Customize this slide to match your practice's implementation strategy.

