

# Warm Handoff Plus

## How To Use the Training Toolkit



### What is the Warm Handoff Plus strategy?

A Warm Handoff Plus is a handoff that is conducted in person, between two members of the healthcare team, in front of the patient (and family if present). It includes the patient as a team member so that he or she can hear what is being discussed about the clinical problem, current status, and plan of care.

The term “warm handoff” originated in customer service where it is used to describe referrals that ensure that the customer is connected to someone who can provide what he or she needs. In healthcare, this typically means that one member of the healthcare team introduces another team member to the patient, explaining why the other team member can better address a specific issue with the patient and emphasizing the other team member’s competence. Often, it is used to describe the handoff between a medical provider and a behavioral health specialist.

The emphasis of the Warm Handoff Plus is specifically on **engaging the patient and family** in the handoff within the primary care practice. A Warm Handoff Plus can occur between any two members of the healthcare team, including clinicians, medical assistants, front and back office staff, and members of the extended care team, such as the pharmacist, diabetes nurse educator, or social worker.

### What is the training toolkit?

The training toolkit:

- Helps you understand the Warm Handoff Plus strategy.
- Gives you the tools to help you train your practice in the strategy.
- Includes:
  - Training slides with speaker notes.
  - Video that explains and demonstrates the Warm Handoff Plus.
  - Role play scenarios for practice.

### How should I train my practice?

1. Customize the slides to reflect the decisions you have made about how you will implement the strategy.
2. Decide who within the practice will receive training.

3. Schedule a training meeting (or several meetings). If possible, try to schedule training meetings of at least 15 minutes.
4. Present the training.
5. Play the video.
6. Conduct role play scenarios to give staff practice opportunities.

## How should I use the training slides?

Training slides are provided to help you train your practice in the use of the Warm Handoff Plus strategy. You can customize slides, remove slides, or create additional slides – whatever you think is appropriate. You will need to customize several slides to reflect how your practice will implement the strategy. The training slides include speaker notes to help you present the training.

## How should I use the role play scenarios?

Three role play scenarios are provided to allow your care team members to practice creating a safe medicine list. The scenarios should be conducted during group training so both participants and observers can benefit. A facilitator should play the role of the patient; it is best if the facilitator is already familiar with the strategy. A volunteer should play the role of the care team member.

The role play scenarios include:

- A description of the patient and the situation. This should be provided to everyone in attendance. It may be projected on a slide, handed out to everyone to read individually, or read aloud to the group.
- Additional information about the patient for the facilitator. This should be read only by the facilitator and will help the facilitator respond to the care team member during the role play.
- Prompts for the facilitator to use after the role play to engage the entire group in a learning discussion on what went well and what could be improved.

The scenarios are examples. They can be customized to fit your practice or used as models to develop additional scenarios.

## How should I use the video?

The video explains the process and benefits of a Warm Handoff Plus, demonstrates a Warm Handoff Plus in the primary care setting, and takes less than 5 minutes to watch. It is an important training tool for all care team members to view. You can project the video during your group training and/or send your care team members the link to the video (<https://www.ahrq.gov/professionals/quality-patient-safety/patient-family-engagement/pfeprimarycare/interventions/webinars/videos/warm-handoffs.html>) and ask them to watch it.