

Warm Handoff

AHRQ

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



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Speaker



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No financial conflicts of interest to
disclose.

Objectives

- Review the key threats to patient safety in primary care settings and interventions to engage patients and families to improve safety
- Describe the role and value of the Warm Handoff strategy in improving patient safety
- Identify strategies for implementing the Warm Handoff strategy in primary care settings

Guide – Project Goals



- Meaningful engagement with patients and families in ways that impact safety, not just quality
- Based on evidence
- Tools that are easy to use
- Tools for practices who have not done much in this area

Key Project Deliverables

- Environmental Scan
- Four Case Studies of Exemplar Practices
- Four Interventions to Improve Safety by PFE
- Final Guide



Key Threats & Promising Interventions

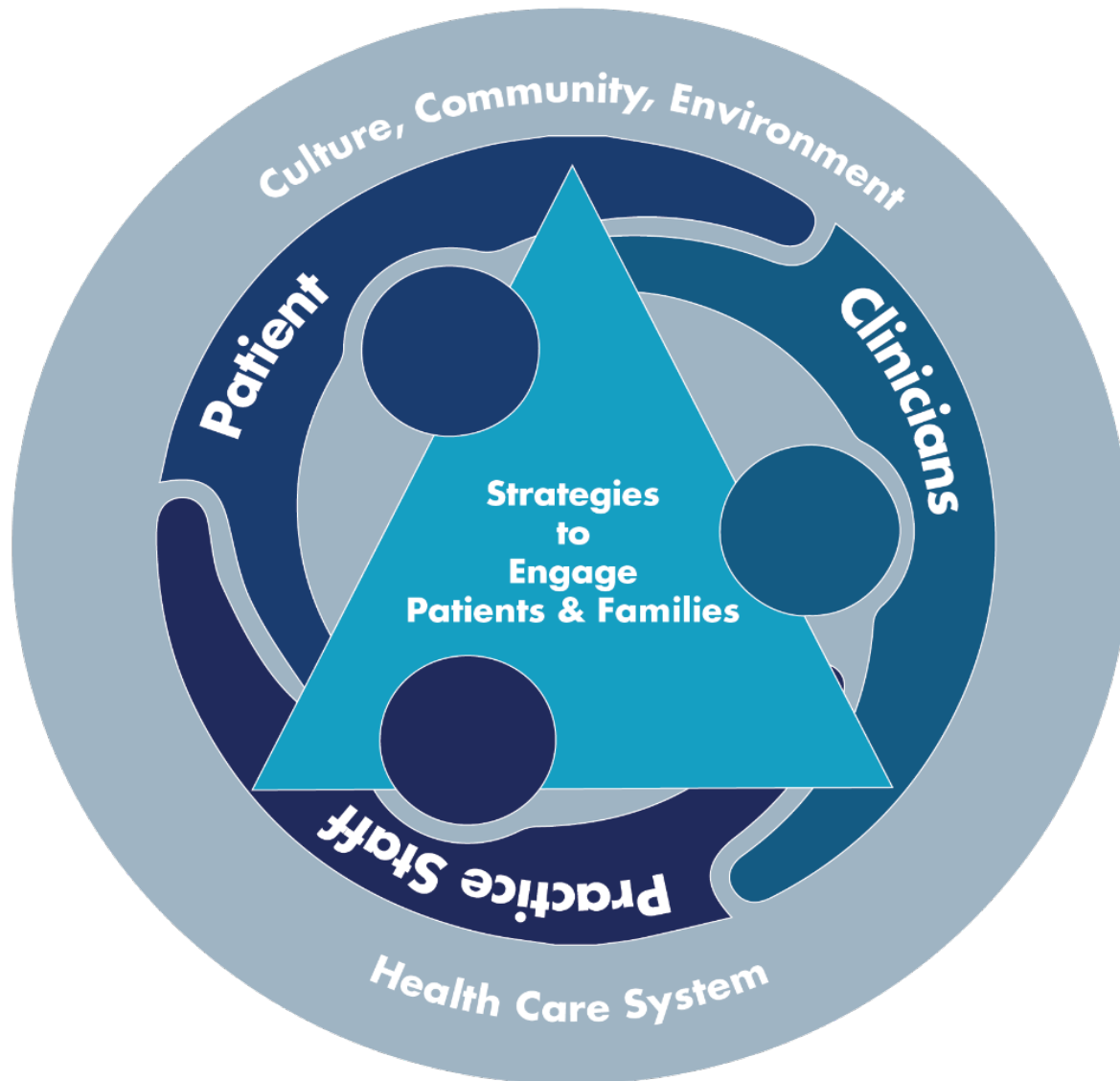
Threats to Patient Safety

- Breakdowns in communication
- Medication management
- Diagnosis and treatment
- Fragmentation and environment of care

Promising Interventions

- Shared Decisionmaking
- Patient and Family Advisory Councils (PFAC)
- Team-based Care
- Medication Management
- Family engagement in care
- Structured communication tools

Patient & Family Engagement in Primary Care



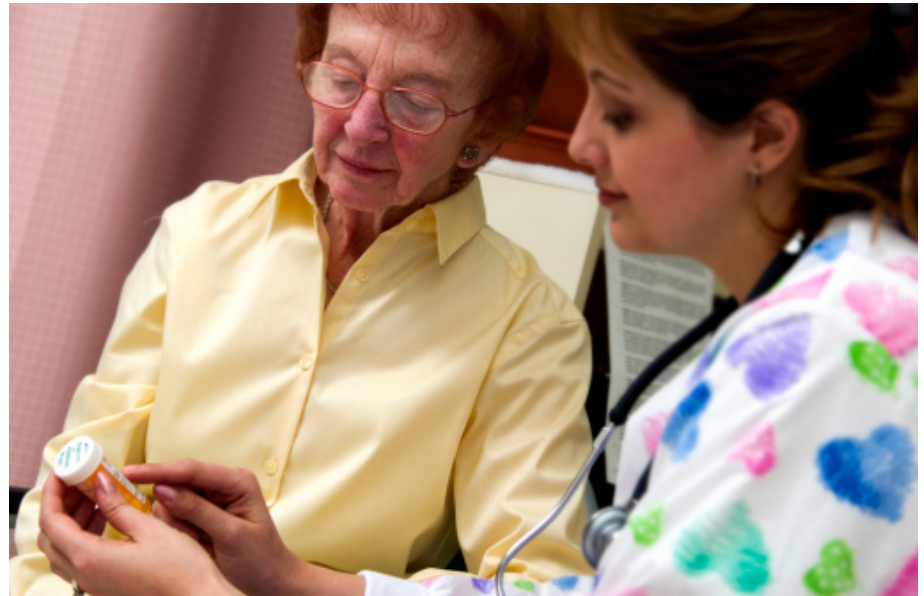
Four Interventions

- Teach-Back
- Be Prepared to be Engaged
- Medication Management
- **Warm Handoff**



What is the Warm Handoff Strategy?

- Strategy to encourage bi (or tri) directional communication with patients, family members and the care team
- Moves conversations between healthcare team members in front of the patient
- A safety check!



Why Use the Warm Handoff Strategy?

- Communication breakdowns are a key threat to patient safety.
- Miscommunication and omissions can lead to medical errors and adverse events.
- Use warm handoffs to:
 - Increase patients' understanding of the diagnosis and plan of care.
 - Engage all members in team-based care, including patients and families.
 - Validate and verify information exchanged.
 - Reduce breakdowns in communication.

When should a Warm Handoff be used?

- After rooming patients
- After the patient exam
- Anytime during transitions in care such as with the
 - Scheduler
 - Lab technician
 - Nurse educator
 - Other team members

Getting Started



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

Implementation Quick Start Guide Warm Handoff



Step 1

- Identify a Champion and get Leadership Buy-in

Step 2

- Develop processes for using Warm Handoff

Step 3

- Train team members and initiate implementation

Step 4

- Introduce the Warm Handoff to patients

Step 5

- Evaluate and refine

Step 1. Leadership Buy-in



- Identify a Warm Handoff practice champion
- Obtain leadership buy-in and support
- Identify a process improvement team
 - ❖ Engage a patient or two in developing your plan

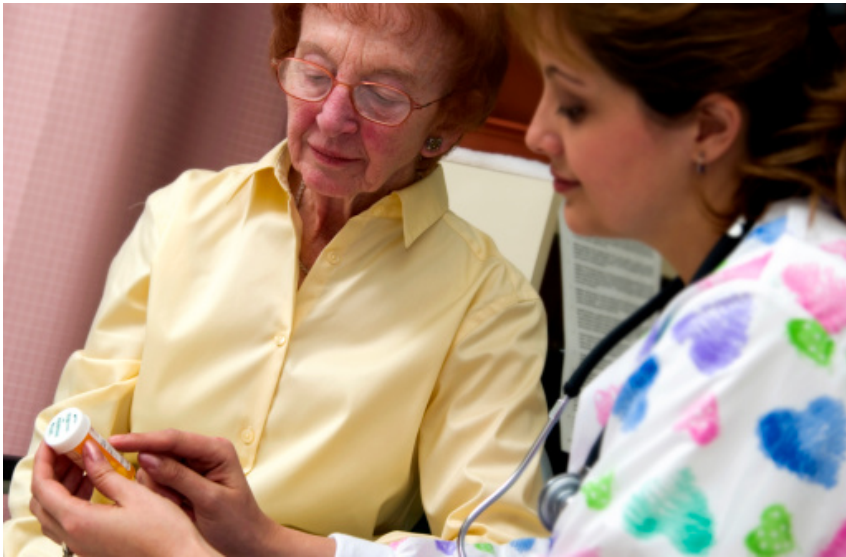
Step 2. Design Implementation

- Identify a team to help design processes for each of the Warm Handoff strategy tools
- Identify resources for implementation

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Step 3. Orient Practice Staff



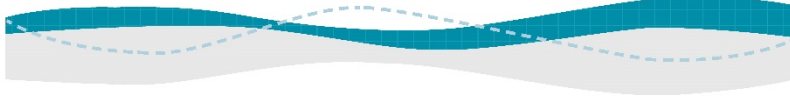
- Information about the Warm Handoff Strategy for:
 - Practice Staff
 - Clinicians
- Provide overview of resources available and how to use Warm Handoff to enhance engagement

A Warm Handoff in Action



<https://www.youtube.com/watch?v=ZTL5ltGMUIQ&feature=youtu.be>

Checklist for Staff



Checklist: Conducting a Warm Handoff

Present to the Clinician

- Reason for the visit.
- Patient visit goals and health concerns.
- Vital signs, BMI/weight, significant changes.
- Medication issues (e.g., refills, side effects).
- Updates on reports:
 - Labs.
 - Imaging.
 - Specialist visits.
 - Hospital discharge summary.

Engage the Patient

- What would you like to add?

- Checklist to help support adoption
- Guides the elements of the conversation between the Clinician and Practice Staff
- Asks the Patient to engage in the conversation

Clinician and Staff Handouts

Warm Handoffs

A Guide for Clinicians

What is a warm handoff?

A warm handoff is a handoff that is conducted **in person**, between two members of the health care team, **in front of the patient** (and family if present).

How do I conduct a warm handoff?

Whenever you need to share information about patient care, do it in person and in front of the patient.

You can both give and receive warm handoffs. For example:

- After your staff has roomed the patient, the staff member can use a warm handoff to present the patient to you. A checklist is available to help with this.
- After you complete the clinical exam, you can use a warm handoff if additional patient services such as labs or immunizations are needed.
- You can use a warm handoff with extended care team members such as a diabetes educator or pharmacist and with specialists.

Why is it important?

Communication breakdowns can result in medical errors. Warm handoffs can help address communication issues and:

- Engage patients and families and encourage them to ask questions.
- Allow patients to clarify or correct the information exchanged.
- Build relationships.
- Provide a safety check.

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Guide to Patient and Family
Engagement in Primary Care

Warm Handoffs

A Guide for Staff

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A warm handoff is a handoff that is conducted **in person**, between two members of the health care team, **in front of the patient** (and family if present).

How do I conduct a warm handoff?

Whenever you need to share information about patient care, do it in person and in front of the patient. That's all there is to a warm handoff!

You can both give and receive warm handoffs. For example:

- After you room the patient, you can use a warm handoff to present the patient to the clinician. A checklist is available to help you with this.
- After the patient exam, you can receive a warm handoff from the clinician when the patient needs additional services like immunizations, labwork, or education materials.
- You can use a warm handoff with the scheduler, lab technician, or staff who assist with referrals.

Why is it important?

Warm handoffs can:

- Engage patients and families as team members.
- Allow patients to clarify or correct the information exchanged.
- Build relationships.
- Provide a safety check.

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Guide to Patient and Family Engagement in Primary Care

Step 4. Orient Patients

- Orient the patient to the Warm Handoff Strategy
 - Patient Fact Sheet
- Discuss why it is important
- Reinforce the need for patients to engage in discussions about their care



A Patient's Guide to Warm Handoffs

What is a Warm Handoff?

A warm handoff is a way for your healthcare team to include you when they share information about you during an office visit. In any handoff, healthcare team members share information about your health or your plan of care. In a warm handoff, they share information in person, with YOU there too. This helps you join the conversation – to speak up, ask questions, and better understand.

When is warm handoff used?

There are many chances to use a warm handoff. It can be used every time team members share information about your health or your plan of care. Here are some examples:

- The medical assistant who takes your blood pressure and weight and asks you why you came to the visit can use a warm handoff with the doctor when the doctor comes in to see you.
- The doctor can use a warm handoff when explaining to the medical assistant the treatment you are to get in the office, like a flu shot.

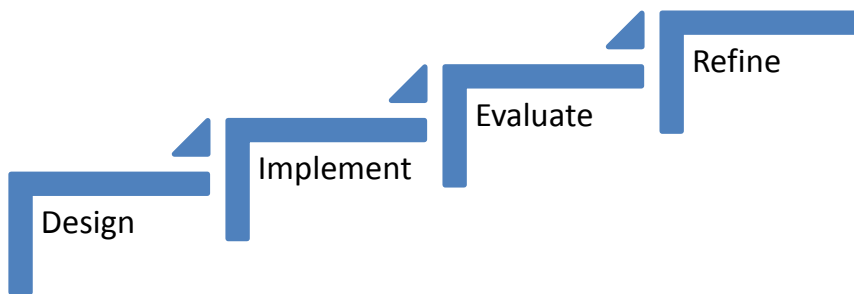
Why is it important?

A warm handoff:

- Lets you hear what your providers are saying about your health and your plan of care.
- Encourages you to speak up, ask questions, and join the conversation about your health.
- Gives you a chance to correct or clarify any information.
- Makes you an active member of your health care team.

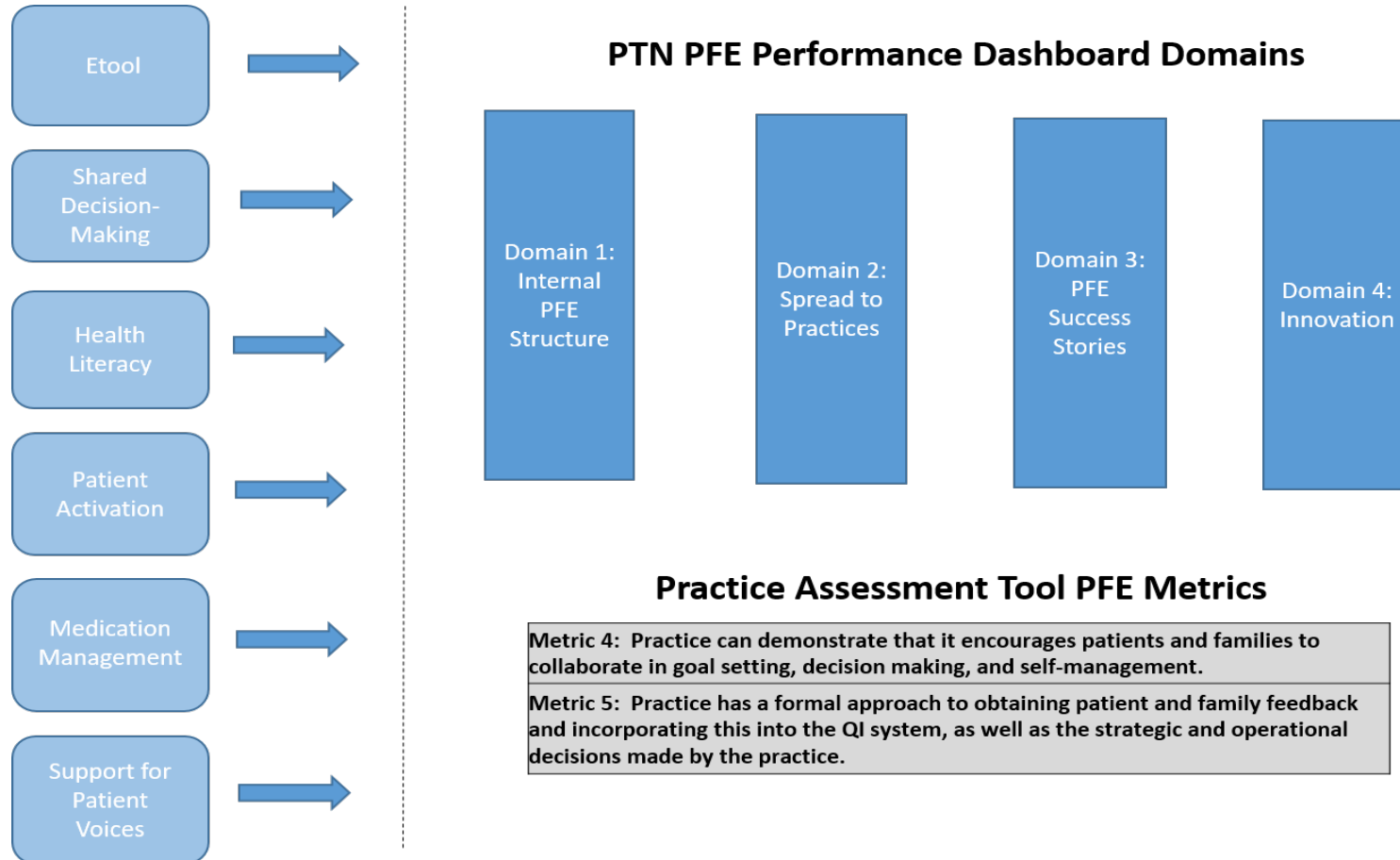


Step 5. Evaluate & Refine



- Observations
- Team debriefs
- Simple counts

How can the AHRQ PFE Guide help practices achieve success?



How Can I Get Started?

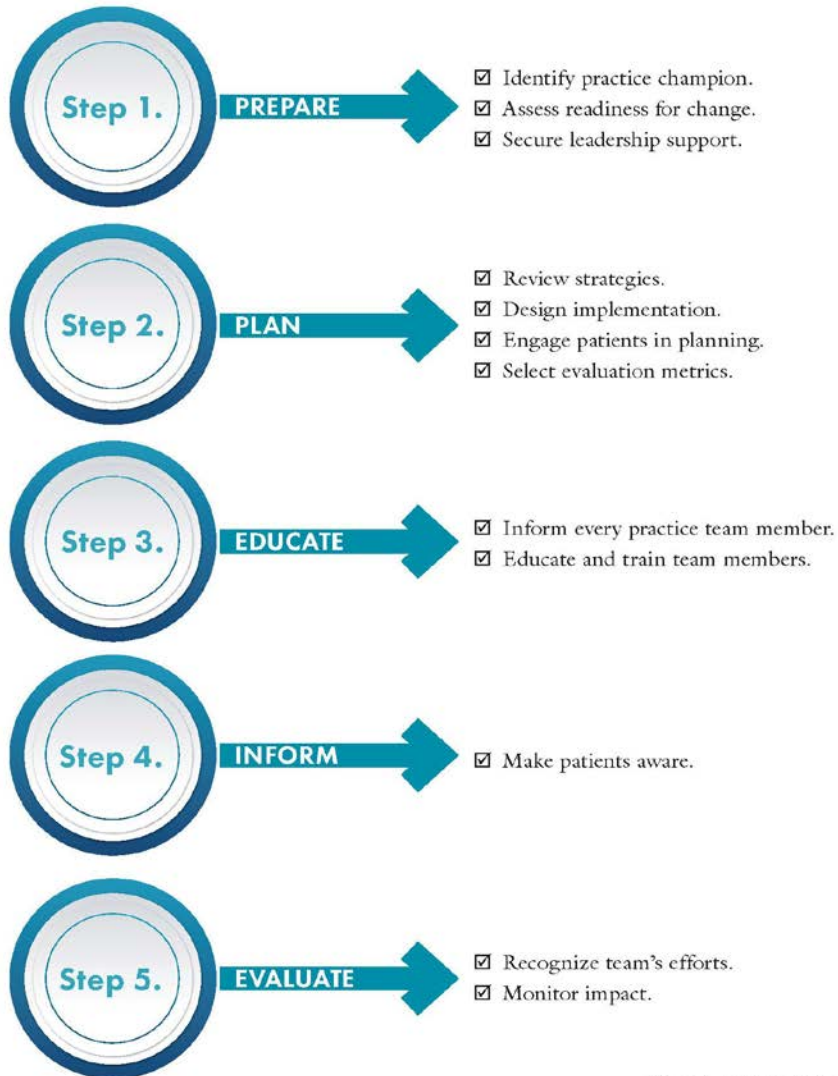


Figure 1. Implementation Process

QUESTIONS?