Be Prepared to Be Engaged

AHRQ
Guide to Improving Patient Safety in Primary Care Settings by Engaging Patients and Families
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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 Be Prepared to Be Engaged strategy in improving patient safety

• Identify strategies for implementing the Be Prepared to Be Engaged 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 Be Prepared to Be Engaged Strategy?

• Encourages patient & family engagement in three ways:
  1. Be ready.
  2. Speak-up and ask questions.
  3. Take Notes.

• Clinicians and staff support and reinforce use of the tools to support engagement.
Why Use this Strategy?

Facilitating Communication

• Unlocking shared meaning
• Revealing contextual factors about the patient
• Preventing communication breakdowns that can result in medical error

Improving time management

• Enhancing information exchange between the patient and clinician
• Sharing questions and concerns is key for timely and accurate diagnosis
• Improving patient and family understanding of diagnosis and care plan

Weiner et al., 2010
When Is Be Prepared to Be Engaged Used?

- At each visit
- For every patient
Be Prepared to Be Engaged Resources

Now Available!
Visit the AHRQ project website.

Link to Be Prepared materials on AHRQ project website
Getting Started with Be Prepared

Step 1
- Identify a Champion and get Leadership Buy-in

Step 2
- Develop processes for using Be Prepared Tools

Step 3
- Train team members and initiate implementation

Step 4
- Introduce Be Prepared to Be Engaged Materials to patients

Step 5
- Evaluate and refine
Step 1. Leadership Buy-in

- Identify a Be Prepared to Be Engaged practice champion
- Obtain leadership buy-in and support
- Identify a process improvement team
  - Engage a patient or two
Step 2. Design Implementation

• Identify a team to help design processes for each of the Be Prepared strategy tools
  – Patient Note Sheet
  – Patient Prep Card

• Identify necessary resources for implementation
Patient Prep Card

Be Prepared
Fill in this card and bring it to your visit.

Today I want to talk about...

1. ____________________________________________

2. ____________________________________________

3. ____________________________________________

My questions are...

________________________________________________________________________
________________________________________________________________________
________________________________________________________________________

My health goals are...

________________________________________________________________________
________________________________________________________________________

Your next appointment is


Date: ____________________________

at: _____________AM[ ] PM[ ]

[Image]
Patient Note Sheet

- Supports information sharing and transfer
- Clinicians should reinforce its use to record important information
  - Medications
  - Tests and test results
  - Next steps
Step 3. Orient Practice Staff

- Flyers and posters about Be Prepared for
  – Practice Staff
  – Clinicians
- Provide overview of tools and how to reinforce patient use
Step 4. Orient Patients

- Orient the patient to the Be Prepared Strategy
  - Patient Fact Sheet
- Discuss expectations for use
- Reinforce behaviors at every level of the encounter
Step 5. Evaluate & Refine

- Observations
- Team debriefs
- Simple counts
How can Be Prepared Strategy help us?

- Safety & Quality
- Costs
- Advancing Care Information
- Clinical Practice Improvement
How can the AHRQ PFE Guide help practices achieve success?

PTN PFE Performance Dashboard Domains

Domain 1: Internal PFE Structure
Domain 2: Spread to Practices
Domain 3: PFE Success Stories
Domain 4: Innovation

Practice Assessment Tool PFE Metrics

Metric 4: Practice can demonstrate that it encourages patients and families to collaborate in goal setting, decision making, and self-management.

Metric 5: Practice has a formal approach to obtaining patient and family feedback and incorporating this into the QI system, as well as the strategic and operational decisions made by the practice.
How can I get Started?

- Identify a champion leader
- Develop a process for engaging patients and families using the intervention
- Engage entire practice team
- Inform patients & families
- Evaluate & refine process
QUESTIONS?
References


