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

Implementation Quick Start Guide

Be Prepared To Be Engaged

DEPARTMENT OF HEALTH & HUMAN SERVICES • USA

AHRQ
Agency for Healthcare Research and Quality

Table of Contents

What Is the Be Prepared To Be Engaged Strategy? 1

Why Use the Be Prepared To Be Engaged Strategy? 1

Tools for Be Prepared To Be Engaged 1

Resources Needed To Implement Be Prepared To Be Engaged 3

Implementing the Be Prepared Strategy..... 3

- Step 1. Obtain leadership buy-in, and identify a champion. 3
- Step 2. Develop a process for engaging patients and families using the Be Prepared tools 4
  - Patient Prep Card 4
  - Patient Note Sheet 5
- Step 3. Make all team members aware of the Be Prepared To Be Engaged strategy and tools 5
- Step 4. Make patients and families aware of the Be Prepared To Be Engaged strategy and tools 5
- Step 5. Evaluate and refine your process 6

References 7

What Is the Be Prepared To Be Engaged Strategy?

The Be Prepared To Be Engaged strategy is an effort to help patients and their families prepare for and become more fully engaged in their medical appointments. Several tools are available to patients and families as part of the strategy. The goal is to help them join their own health care team—to *be ready* for the appointment, to *speak up*, to *ask questions*, to *take notes*. Tools are also available for clinicians and practice staff to help them encourage and reinforce patient preparation and engagement.

Why Use the Be Prepared To Be Engaged Strategy?

Patients often arrive at a primary care visit unprepared to discuss their current symptoms, their medical history, their medications, and their questions. In addition, time is limited in a primary care visit. Lack of preparation and limited time can lead to an inadequate exchange of information between the patient and clinician. Communication breakdowns between the patient and the clinician or the patient and the practice staff can result in medical error.

When patients and their families are well prepared for primary care visits, the visit time is used more effectively. Patients and families are more engaged in their care, they are better able to communicate their questions and concerns, and they are more likely to leave the visit with an understanding of their diagnosis and care plan, all of which can improve patient safety.[1-4]

Tools for Be Prepared To Be Engaged

The Be Prepared To Be Engaged strategy includes tools for patients and families, clinicians, and practice staff.

For Patients and Families

Material	Uses	Description and format
Patient Prep Card	▪ Help patients and families prepare for a medical appointment. ▪ Allow patients and families to document reasons for the appointment, along with their concerns, questions, and goals.	▪ The Patient Prep Card is sent to patients to be filled out before the appointment. It is also made available to patients and families in the waiting room and the exam room. ▪ Format: 4" x 6" note card.
Patient Note Sheet	Encourage patients or family members to take notes during the appointment.	▪ The Patient Note Sheet is available in the exam room. Patients or family members are offered the Note Sheet and a pen and are encouraged to take notes during their appointment. ▪ Format: 1-page sheet.
Be Prepared To Be Engaged!	Inform patients and families about tools available to help them be prepared and engaged.	▪ This handout explains the Patient Prep Card and Patient Note Sheet to make patients aware of the tools and how they can be used. ▪ Format: 1-page handout.

For Clinicians

Material	Uses	Description and format
Be Prepared To Be Engaged—A Guide for Clinicians	Inform clinicians about tools available to help patients and families be prepared and engaged.	▪ This one-page handout explains the Patient Prep Card and Patient Note Sheet and the clinician role in their use by patients and families. ▪ Format: 1-page handout.

For Practice Staff

Material	Uses	Description and format
Be Prepared To Be Engaged—A Guide for Staff	Inform practice staff about tools available to help patients and families be prepared and engaged.	▪ This 1-page handout explains the Patient Prep Card and Patient Note Sheet and the practice staff role in their use by patients and families. ▪ Format: 1-page handout.

Resources Needed To Implement Be Prepared To Be Engaged

Resources needed for Be Prepared To Be Engaged are modest.

- **Staffing.** No additional staff are needed to implement the Be Prepared strategy.
- **Costs.** Costs are minimal and include printing the materials and having a sufficient supply of pens for patients and families to use.
- **Time.** The Be Prepared tools are intended to make appointments more efficient and should not be an additional time burden.

Implementing the Be Prepared Strategy

Specific implementation of the Be Prepared strategy will depend on individual characteristics of your practice. The following steps are recommended.

Step 1. Obtain leadership buy-in, and identify a champion.

Strong leadership and staff engagement are important to successful implementation. Identification of a champion within your practice can help guide you in implementing and refining the Be Prepared strategy in your practice.

Step 2. Develop a process for engaging patients and families using the Be Prepared tools.

Collaborate with the clinicians and staff within your practice to develop a process to best use the Patient Prep Card and Patient Note Sheet. A recommended process includes the steps below.

Patient Prep Card

1. Mail the Patient Prep Card to patients before their appointment and ask them to fill in the card and bring it with them. Alternatively, you can give the Patient Prep Card to patients as they leave their current appointment and ask them to write down their questions as they occur and then bring the card with them to their next appointment. You can advise patients that if they develop a long list of questions, they should consider calling the office or perhaps scheduling a sooner appointment.
2. If you use a reminder system such as telephone, email, or text message, include a request in the reminder that they fill in the card and bring it with them.
3. Keep a supply of blank cards at the registration desk and in the exam rooms.
4. When patients arrive for appointments, ask them at the registration desk if they have filled in a Patient Prep Card. If they haven't, offer them a card and a pen and encourage them to fill in the card while they are in the waiting room before they see their clinician.
5. When patients are brought back to the exam room, check again if they have filled in a card.
6. In either the waiting room or the exam room, if the patient's

card remains blank, offer to help the patient fill it in. For patients who are resistant, explain that the card can help them focus their time with the clinician and ensure they do not forget anything.

7. During the appointment, the clinician can use the card to engage the patient and family and ensure that their questions, concerns, and goals have been addressed.

Patient Note Sheet

1. Keep a clipboard and a supply of Patient Note Sheets and pens in the exam rooms.
2. During the appointment, the clinician can offer patients or family members a note sheet and encourage them to write down things they want to remember. The clinician should be clear that the note sheet is for the benefit of the patient and family and is completely optional.

Step 3. Make all team members aware of the Be Prepared To Be Engaged strategy and tools.

Spread the word. Inform all team members about your processes, and make sure they are familiar with the tools and their roles in supporting patient and family engagement.

Step 4. Make patients and families aware of the Be Prepared To Be Engaged strategy and tools.

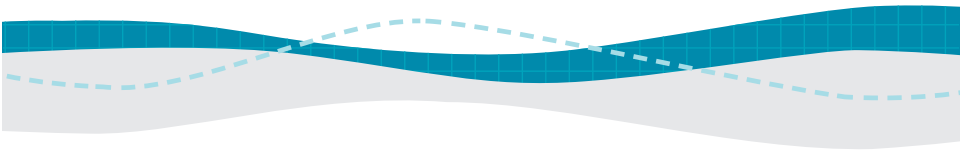
A patient fact sheet is provided to help you inform your patients and their families about being prepared. Make the patient fact sheet easily accessible throughout the practice. It may be printed and distributed to patients and families and/or displayed strategically in the office. Talk with patients about the importance of being prepared and answer any questions your patients and families have.

Step 5. Evaluate and refine your process.

Observe whether patients or family members are filling in the Patient Prep Cards and whether clinicians are using the cards during appointments. Observe whether patients or family members are using the Patient Note Sheets. Refine your implementation process as needed. It may require increased effort from clinicians or practice staff to engage patients and families.

References

1. Lucchiari C, Pravettoni G. The role of patient involvement in the diagnostic process in internal medicine: a cognitive approach. Eur J Intern Med 2013;24(5):411-5. doi:10.1016/j.ejim.2013.01.022.
2. Litchfield IJ, Bentham LM, Lilford RJ, et al. Patient perspectives on test result communication in primary care: a qualitative study. Br J Gen Pract 2015;65(632):e133-40. doi:10.3399/bjgp15X683929.
3. Elder NC, Regan SL, Pallerla H, et al. Educating seniors to be patient safety self-advocates in primary care. J Patient Saf 2008;4(2):106-12.
4. Singh H. Safe and effective communication to prevent diagnostic errors. Middleton, MA: Patient Safety & Quality Healthcare; 2013. http://psqh.com/safe-and-effective-communication-to-prevent-diagnostic-errors.

Implementation Notes

Implementation Notes