### Appendix D – Warm Handoff Plus Implementation Guidance



To help you plan and design your Warm Handoff Plus implementation, a Quick Start Guide (QSG) is available. The Warm Handoff Plus QSG has six stages.

### 1. Review the Intervention and Training Materials

Before you implement Warm Handoff Plus, the practice champion needs to understand the materials, their intended use, and strategies for success.

#### Warm Handoff Plus Video

The Warm Handoff Plus video provides information for the practice champion, clinicians, and practice staff on a good example of a Warm Handoff Plus. Use the video during trainings to set the stage, identify opportunities for collaborative communication, and guide role plays.

#### **Design Guide for Warm Handoff Plus**

The practice champion and the implementation team should use the Design Guide for the Warm Handoff Plus to design the practice's implementation. The Design Guide walks through key decisions the practice will need to make regarding implementation.

Key decisions include:

- Identifying which handoffs or transitions within the practice may be amenable to integration of the patient and family as a team member;
- Determining how to redesign current workflow to accommodate the strategy; and
- Identifying considerations for phasing in Warm Handoff Plus.

The Design Guide is a key document to help support implementation planning and success.

#### **Checklist for Conducting a Warm Handoff Plus**

The checklist for conducting a Warm Handoff Plus provides clinicians and practice staff with guidance to support structured communication when a medical assistant, patient and family member, and clinician are in the exam room together.

The checklist will be helpful when first adopting the intervention in practice. Once your team is comfortable with the process, they may need to use the checklist less often, but keeping it on hand attached to the computer station for quick reference may support consistent application of the strategy.



Design Guide for Warm Handoff Plus	
Introduction	
In a typical primary care visit, the patient transitions from one merr to another multiple times, often without team members talking to or- point'n visit may sater with a molical assistant (MA) who records the and visit signs. The patient may then see the clinician for the caran, A surves or MA may return to the patient to administer testing, nere patient's visit may end with the scheduler and functial staff. In card sines for breakdowns in communication that may lead to medical er	each other. For example, the he patient's chief complaint diagnosis, and plan of care. tment, or education. The h transition, opportunities
A Warw Handoff Placis a transition conducted in person between healthcure team in front of the patient (and family if they are pres- engages the platters as a team neutrone and partner in this or her care discussed, reinforcing his or her understanding of the diagnosis and an opportunity to correct or clarify the information exclusion. At the patient through structured communication and improves patien communication breakdowns.	ent). The Warm Handoff Pla . The patient hears what is I plan of care and allowing Varm Handoff Plus eneages
To adopt the Warm Handoff Plus, many primary care practices will workflow. This design guide provides step-by-step instructions and practices design a workflow that supports the use of a Warm Hando	examples to help primary car
How To Use This Design Guide	
This design guide provides a systematic approach to adopting the W standard in your practice. Every primary care practice is different r- inplement the Warm Handfelf Plasar Midliffer for each practice. Thi step pathway for implementation. Depending on your practice's cha not apply. Adjust the steps and how you accomplish each one as nee	hus, the effort needed to s guide contains a step-by- nacteristics, some steps may
G Anton Tu Go	te to bapwoing Patient ScKry in Primary Ca Settings by Engaging Patients and Famili

Ch	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:		
	<ul> <li>Labs.</li> </ul>		
	<ul> <li>Imaging.</li> </ul>		
	<ul> <li>Specialist visits.</li> </ul>		
	<ul> <li>Hospital discharge summary.</li> </ul>		
	Engage the Patient		
	What would you like to add?		
	a m		

### Warm Handoff Plus Training Toolkit

The training toolkit provides slides, role play scenarios, and a training guide ("How To Use the Training Toolkit") to help support training and adoption. The training toolkit should be used by the practice champion and would be most successfully used in collaboration with a clinical and staff champion.

# 2. Make Decisions for Your Implementation

You will need to make several decisions to support the design of your Warm Handoff Plus implementation. These are listed in the Quick Start Guide and include decisions on:

- How you will obtain materials,
- What the scope of your implementation will be,
- What the workflow will be in your implementation,
- How you will encourage and reinforce the use of the strategy, and
- Who will champion the implementation.

# 3. Customize the Training for Your Practice

The Warm Handoff Plus strategy includes a training guide, slides, and scripts for you to use for team training. You will need to customize the slides and the scripts to reflect the decisions you make on how to implement the strategy in your practice.

## 4. Train Team Members

You should organize initial training sessions to inform staff and clinical teams of the implementation, its goals, and the processes that will be piloted during the initial adoption.

Ideally, trainings should be between 15 and 30 minutes and leverage existing meetings to minimize disruption. Make sure you have copies of the materials for everyone who is attending the training session so they can practice and feel comfortable with the strategy and how to use each material during implementation. Provide enough time to answer questions and discuss any concerns.

Practicing through role play is very important. Try to find opportunities to practice, such as staff meetings, huddles, and "Lunch & Learns."

## 5. Go Live With Implementation

Once your team is trained and materials are obtained and ready to use, it is time to go live with the Warm Handoff Plus strategy.



- Inform staff and clinical teams of the go live date and timelines for initial adoption and evaluation.
- Reinforce the training by using staff meetings and huddles to discuss challenges to implementation and share success stories. These discussions should be held at least weekly during the initial implementation period. This will promote the Warm Handoff Plus strategy and encourage its sustained adoption.
- Identify good implementors and use them as peer coaches or mentors. Share stories of "Safety Catches" revealed through using the strategy.

## 6. Evaluate Your Progress

In addition to the practicewide evaluation of patient safety, it is important to select one or two evaluation measures or metrics specific to the Warm Handoff Plus strategy. Examples of these are provided in the Quick Start Guide.