

# Improving Diagnostic Safety by Engaging Patients and Families

Dec 16, 2021 12:00 PM EST



**PATIENT ENGAGEMENT LEARNING SERIES**

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*Nurse-Led Training and Technical Assistance*



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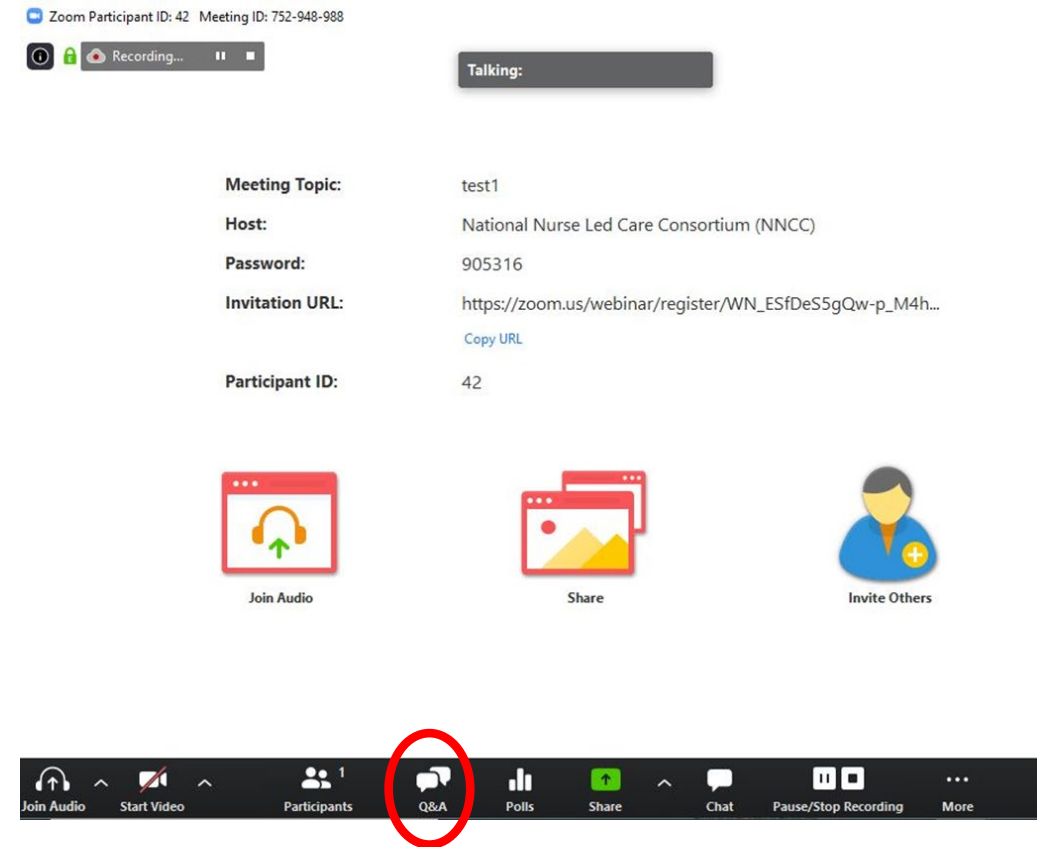
# Housekeeping Items

## Question & Answer

- Click Q&A and type your questions into the open field.
- The Moderator will either send a typed response or answer your questions live at the end of the presentation.

## Continuing Education Credits

- Please complete the evaluation survey after today's training.
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# AHRQ

# Toolkit for Engaging Patients To Improve Diagnostic Safety

Toolkit Webinar



Agency for Healthcare Research and Quality  
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# Speaker



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# Objectives

1. Identify and describe common pitfalls to diagnostic safety within ambulatory care practices.
2. Apply the principles of active listening and reflective practice in support of diagnostic safety.
3. Engage patients and their families in co-creating a diagnostic safety visit agenda.



# Background



Goal: Develop, implement, pilot test and promote a resource to engage patients and families in the diagnostic process in order to reduce diagnostic errors.



Co-developed by patients and clinicians.



# Diagnostic Errors Are a Big Challenge

Nearly every person will experience a diagnostic error in their lifetime.

Did you know...

**57%**  
of all diagnostic failures happen in ambulatory care.<sup>1</sup>

**1 in 20**  
patients who attend a primary care appointment this year will experience a diagnostic error.<sup>2</sup>





# How can we improve diagnostic safety?

## What can patients do?

- ✓ **Tell their story** fully and completely and clearly
- ✓ **Provide accurate information** about their symptoms
- ✓ **Speak up** if they feel they have not been heard
- ✓ **Ask questions** to clarify the information shared
- ✓ **Use a checklist** of tests, symptoms, concerns, or physicians consulted



## What can clinicians do?

- ✓ **Listen** to patients
- ✓ **Support patients** in effectively sharing their symptoms.
- ✓ **Ask patients** what they think is going on
- ✓ **Conduct a thorough history** and physical examination
- ✓ **Set** a visit agenda
- ✓ **Know patients** and their history, and read prior notes
- ✓ **Integrate "pre-work"** for patients (e.g. symptoms; history of present illness; labs)



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***"Just listen to your patient, he is telling you the diagnosis."<sup>1</sup>***

- Sir William Osler



# Toolkit Strategies

**Optimize diagnostic safety by engaging patients and families.**



Encourage patients to share their story with the **Be The Expert On You** note sheet.



Build a collaborative environment using the **60 Seconds To Improve Diagnostic Safety** strategy.



# The Be The Expert On You Strategy



Be the expert on you.

Patient Name \_\_\_\_\_  
 DOB \_\_\_\_\_  
 Date \_\_\_\_\_

**Your provider needs your help to make a safe diagnosis and care plan.  
Please answer these five questions before your visit.**

**Why are you here today?**  
 New problem    Followup    Medicine refill    Something else

\_\_\_\_\_

\_\_\_\_\_

**Has there been a change in how you are feeling since your last visit?**  
 Yes    No

When did it start?    Days    Weeks    Longer

How does it affect you?

\_\_\_\_\_

\_\_\_\_\_

**Have you seen anyone else about your health?**  
 Yes    No

Whom did you see?

\_\_\_\_\_

\_\_\_\_\_

**Do you have questions about...**  
 Medicines?    Tests?    Treatments?    Something else?

\_\_\_\_\_

\_\_\_\_\_

**What are you worried about?**

\_\_\_\_\_

\_\_\_\_\_

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**Be ready to share this information with your provider.**

**Thank you for being part of the care team.**

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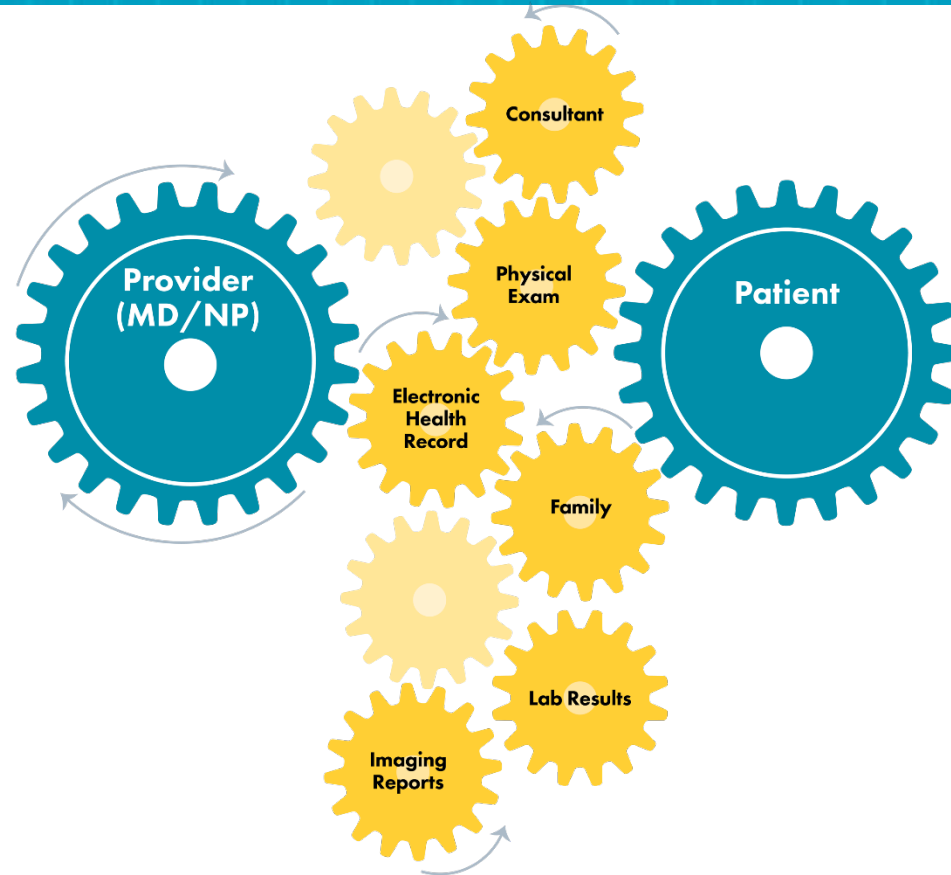
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# 60 Seconds To Improve Diagnostic Safety Strategy



# How Does 60 Seconds To Improve Diagnostic Safety Work?



**Ask**



**Listen**



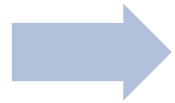
**Act**



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# How Do I Get Started?



## Ask

- What brings you in today?
- I would like to hear from you about how you are doing.

## Listen

- Actively listen, encouraging engagement with "uh huhs"
- Write notes and make eye contact to show you are listening.

## Act

- Use the information shared to cocreate a care plan.
- Ask additional questions to clarify information shared.



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# Toolkit Implementation Roadmap



## Engaging Patients To Improve Diagnostic Safety Toolkit Roadmap



This Implementation Roadmap provides an overview of the steps for implementation and the toolkit materials you will need to use at each step.

### Step 1: Prepare Your Organization

- **Orient leaders to the change** Toolkit **Infographic** provides statistics about incidents of diagnostic errors that are useful to engage leadership and raise awareness of the problem.
- **Identify your change team** Toolkit **Webinar** helps teams get started with the toolkit's implementation. It should help your team identify how the toolkit may need to be adapted to work with your practice's workflow and unique patient population.

### Step 2: Make a Plan

- **Be The Expert On You** **Be The Expert On You Planning Worksheet** provides key questions to help your team plan how your team will implement the Be The Expert On You note sheet.
- **60 Seconds To Improve Diagnosis** **60 Seconds To Improve Diagnostic Safety Planning Worksheet** provides key questions to help your team plan how your provider team will implement the 60 Seconds to Improve Diagnostic Safety strategy.
- **Evaluation Planning** **Evaluation Planning Worksheet** provides your team with ideas of how to measure success of the toolkit and its impact on patients, providers, and your practice.

### Step 3: Train Your Team

- **Train staff** A **One-Page Handout for Staff Training** can be used to help staff get comfortable introducing the Be The Expert On You note sheet to patients. It includes a sample script and tips on how to get started.
- **Train providers** **Provider Training Slides** is a short slide presentation with speaker's notes to help train your providers on how to get started.
- **Orient your practice** **Practice Orientation and Training Slides** can be adapted to how your practice is implementing the toolkit. Use these slides to orient your whole practice or break them up to focus on training different team members (e.g., front desk staff, medical assistants, nurses, providers).



Toolkit for Engaging Patients To Improve Diagnostic Safety

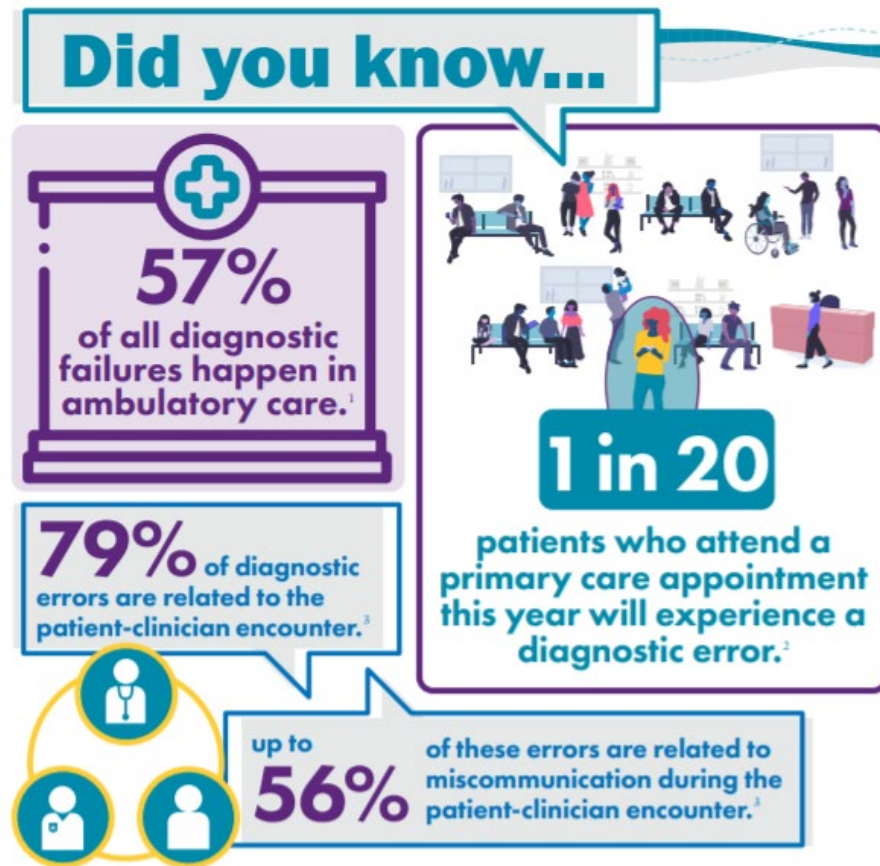


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# Prepare Your Organization



# Planning Worksheets

## Be The Expert On You Planning Worksheet



When planning your implementation, be sure to have the following materials available so that you can adapt them to your practice's plan.

- Be The Expert On You Note Sheet
- One-Page Handout for Staff Training
- Evaluation Planning Worksheet
- Practice Orientation and Training slides

### 1 Set scope

- Which patients will receive the Share Your Story strategy?
  - All patients?
  - Patients with select diagnoses?
  - Patients with acute visits?
  - Telehealth visits?

### 2 Establish workflow

- When will you give patients the note sheet?  Before visit  At visit intake
- How will you give patients the note sheet?
  - In person
  - Email
  - Patient portal
  - Other \_\_\_\_\_
- Who will give patients the note sheet?
- How will the note sheet be explained to the patient?
- Will you adapt and use the One-Page Handout for Staff Training?
- Will you ask staff to help patients fill out the note sheet?
- Will the note sheet be collected after the visit, or will it remain with the patient?
- Will you document the note sheet in the EHR? How and where?
- Will you print the note sheet and poster in the office or order printing?
- Who will be responsible for maintaining a supply?
- Do you need Spanish versions?
- Review and adapt the Practice Orientation and Training Slides to reflect your chosen workflow (Slides 11-13), plans for evaluation (Slide 14), and next steps (Slide 15) of the Toolkit.

### 3 Encourage use of the strategy

- How will you encourage patients to use the note sheet?
- How will you encourage or facilitate use of the note sheet by patients who are not interested in participating?

### 4 Determine training plan

- How will you train providers and staff?
- Who will provide the training?
- When will the training be conducted?



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## 60 Seconds To Improve Diagnostic Safety Planning Worksheet



When planning your implementation, be sure to have the following materials available so that you can adapt them to your practice's plan

- Provider Training slides
- Evaluation Planning Worksheet
- Practice Orientation and Training slides

### 1 Set scope

- With which patients will you use the 60 Seconds To Improve Diagnostic Safety strategy?
  - All patients?
  - Patients with select diagnoses?
  - Patients with acute visits?
  - Telehealth visits?

### 2 Establish workflow and adapt training materials

- How will you time the patient's story?
- How will you advise providers to address patients who talk about more than can be handled during their visit?
- How will you document the 60 Seconds To Improve Diagnostic Safety strategy in the medical record?
- How will you evaluate success?
- Review and modify the Practice Orientation and Training Slides to reflect your chosen workflow (Slides 11-13), plans for evaluation (Slide 14), and next steps (Slide 15) for the Toolkit.
- Review and modify the Provider Training slides to reflect your plans for evaluation (Slide 16) and next steps (Slides 17-18) for the 60 Seconds To Improve Diagnostic Safety strategy.

### 3 Encourage use of the strategy

- How will providers support patients to share their story for one minute?
- How will providers encourage patients who are reluctant to talk for one minute?
- How will you advise on timeline and next steps?

### 4 Determine training plan

- How will you train providers and staff?
- When will you train providers? Set a date and a time for the training.
- Who will provide the training?



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# Train Your Team



## One-Page Handout for Staff Training

### What is Be The Expert On You?

- A way to help patients be ready to talk to their provider about their health.
- A strategy to improve our practice's diagnostic safety.

### What do I need to do?

- Make sure you understand the contents of the Be The Expert On You note sheet and why we are using it.
- Explain to patients what they need to do and why.
- Quickly review the note sheet for completion during rooming.
- Help patients complete the note sheet if they are having trouble.

### How do I explain the note sheet to patients?

- Use these sample scripts to practice introducing the Be The Expert On You note sheet.
- Adapt the scripts to make them your own

*"Our practice is working to improve patient safety and diagnosis, and we need your help. [Insert provider name] would like you to fill out this note sheet as much as you can before you see him/her. This will help us get the whole story of what is going on with you and make the most of your time with us."*

*"If you have any questions about how to fill out the note sheet, please ask. We will be happy to help you. When you finish filling it out, hold onto it to help Be The Expert On You when [insert provider name] comes in to see you."*

### Remember to:

- Remind patients what to do with the note sheet after they have completed it (e.g., keep it with them until they see the provider).
- Give support to patients who need it. Not all patients will ask for help – if you see a blank note sheet during rooming, take a minute to see if you can help the patient complete it.
- Thank the patient for taking the time to complete the note sheet and reinforce its importance.

## Be Silent for 60 Seconds

- Get comfortable.
- Put away phones and other distractions.
- Close your eyes.



## Engaging Patients To Improve Diagnostic Safety

Practice Orientation

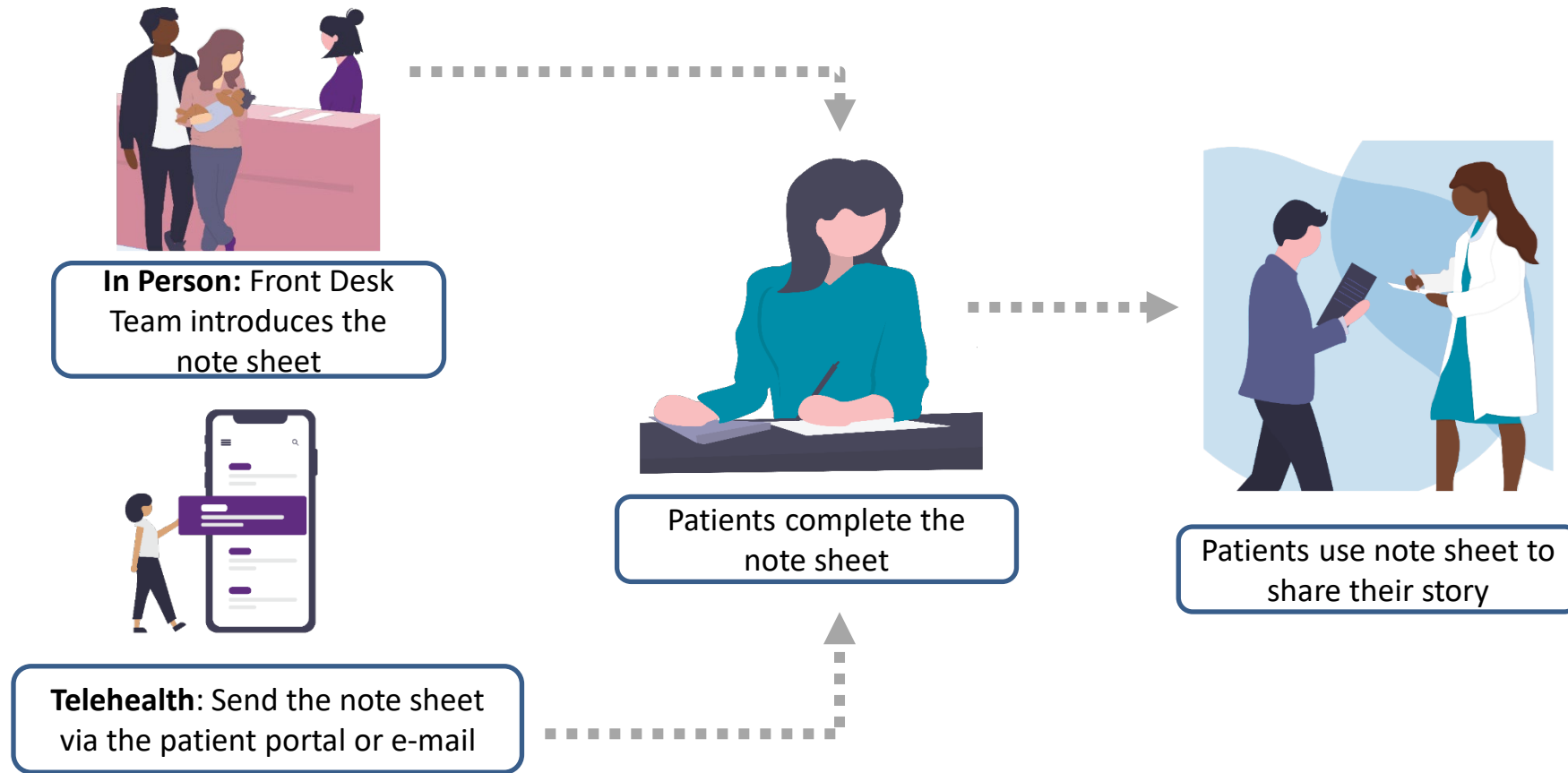


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# Sample Workflow: Be The Expert On You Note Sheet



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# What should we expect?

Improved relationships with patients leading to improved experience and safety



Clear, concise, correct, and complete information to make diagnostic decisions

Enhanced connection and reduced technical burnout



A return to the joy of healing



# Thank You.

- Visit the AHRQ Website to download the Toolkit today!

<https://www.ahrq.gov/patient-safety/resources/diagnostic-safety/toolkit.html>



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