

Warm Handoff Plus



1—Review intervention and training materials

- Understand the purpose, use, and benefits of Warm Handoff Plus.
- Review the training toolkit.
- Watch the Warm Handoff Plus video.

2—Make decisions for your implementation

Set scope

- Which transitions will you target for Warm Handoff Plus? Medical assistant to clinician? Clinician to medical assistant? Clinician to educator? Medical assistant to lab? Other?

Revise workflow

- How will current workflow have to change to accomplish Warm Handoff Plus?
- What are the implications of changing the workflow?
- How will those implications be addressed?
- Will you use the checklist?

Identify champions

- Who will champion the strategy within each role on the team?

3—Customize training for your practice

- Customize the training materials to reflect your decisions.
- Select and/or customize role play scenarios.

4—Train team members

- Use staff meetings and huddles.
- Strive for training meetings of at least 15 minutes.
- Use the Warm Handoff Plus video.
- Conduct role play sessions.

5—Go live with implementation

- Inform staff of timeline.
 - Go live.
 - Identify good implementors and use them as peer coaches.
 - Continue to promote Warm Handoff Plus and encourage its use.
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6—Evaluate your progress

Evaluate effectiveness

- How many miscommunications are corrected during a Warm Handoff Plus?
- What is patient satisfaction with the Warm Handoff Plus?
- What is clinician satisfaction with the Warm Handoff Plus?

Evaluate implementation success

- How often does the intended Warm Handoff Plus occur?
 - In what percentage of Warm Handoff Pluses is the patient included?
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