

## Diagnostic Safety Toolkit: Activity One – Getting Started

### Steps for Using This Toolkit

1. Getting Started	2. Discuss Vignettes	3. Conduct Institutional Inventory	4. Reflection and Action Guide
<ul style="list-style-type: none"> <li>• Review goals and objectives.</li> <li>• Convene team.</li> <li>• Hold meeting.</li> </ul>	<ul style="list-style-type: none"> <li>• Identify participants.</li> <li>• Research, discuss, and document answers.</li> <li>• Discuss the “Institutional Approach Questions” and the vignettes; document answers.</li> <li>• Summarize key takeaways.</li> </ul>	<ul style="list-style-type: none"> <li>• Work through each of the seven steps to identify communication gaps</li> <li>• Document answers</li> </ul>	<ul style="list-style-type: none"> <li>• Identify three high priority communication gaps and rank them</li> <li>• Choose one to act upon to close the gap</li> <li>• List specific steps to close the gap and measure the change</li> </ul>

### Goals and Objectives

**Project goal:** To facilitate discovery and discussion among clinicians, learners, and leaders within academic medical centers (AMCs) about how diagnostic testing information, results, and follow-up can be reliably communicated, especially around care transitions.

**Performance goal:** Improve the safety and quality of diagnostic test follow-up to reduce the probability of diagnostic errors and poor outcomes.

#### Learning objectives

- Assess current internal organizational policies, culture, procedures, and practices regarding diagnostic test follow-up across transitions of care
  - Given a specific vignette, describe the actions health care personnel at your institution would usually take if the patient were in your health system, and how this aligns with current institutional policies and procedures.
  - Using information gathered from the vignette discussion and the step-by-step inventory guide, assess the effectiveness of current institution communication processes and practices
- Initiate discussions to identify strategies for improving diagnostic test follow-up
  - Using the “Reflection and Action Guide,” develop a plan to improve at least one identified communication gap.
- **PC users, please note:** After selecting hyperlinks within this document, press Alt + ← to return to your original location.

### Convene a Core Team

Prior to convening a team, it’s important to describe the rationale for this project, which is found in the Preface.

The project champion/lead will identify key stakeholders to serve as the core team. The following is a list of stakeholders to include:

- Project champion.
- Project manager (with operational expertise).
- Trainees from multiple graduate medical education (GME) programs.

- Departmental GME leaders from multiple departments.
- Clinical quality and safety leadership.
- Patients, their families, and/or patient representatives.
- Laboratory and radiology leadership.
- Nursing leadership.
- Health IT and clinical informatics experts.
- Quality improvement personnel.
- Other key stakeholders at your institution.

### Hold a Kickoff Meeting of the Core Team

The first meeting of the core team may be held in-person or virtually, per your institutional protocol. Below are some suggestions for structuring the meeting.

#### Introduction and Overview

- In advance of the first meeting, you may want to send participants the text of the opening patient vignette, found in the preface, or you may choose to share it at the beginning of the meeting. A patient story is a good way to quickly capture your team’s attention and generate excitement.
- Depending on the makeup of your team, you may want to conduct an icebreaker.
- Following the icebreaker and/or the vignette discussion, present a short (1-3-minutes) overview of the project. You may also want to provide a copy of the preface.

#### Goals and Guiding Principles

- Identify shared goals for this initiative — ask the participants what they hope to accomplish during this time together. Below are some possible goals to start the conversation:
  - Identify current best communication follow-up practices that are working.
  - Identify where the communication gaps occur.
  - Improve patient follow-up protocols.
- Identify a set of guiding principles – a few suggestions include:
  - Transparency.
  - Patient-centeredness.
  - Equity-focused.
  - Operationally viable and not onerous.