

Introductions with Intention

For Providers:

In some clinics, the concept of the patient seeing someone other than the physician for clinical care may be new. Patients may be concerned about this change of process; they may worry that they're not getting the 'best' care.

For this reason, it's critical to be strategic when introducing patients to team members for shared care. Some tips include:

- If possible, make the introduction in person.
- Highlight the knowledge and skill level of the team member.
- State how much you trust the team member.
- Reassure the patient that you will still be their primary provider and be available when they need you.
- Explain that the team member will be keeping you up to date on the patient's situation and progress.
- As appropriate, highlight that the team member knows more about the topic than you do, and can offer more to help or guide the patient (e.g., dietitian).
- Be patient! Some people need more time to adjust to a new process.
- Although it's good to offer to continue seeing the patient as often as they would like to see you, most physicians who have switched to a team approach report that patients typically book with them more appropriately. This allows for physicians and NPs to focus on the delivering the care that only they can. It also creates increased opportunity to provide appointments for patients who need more immediate care (i.e., improved access).

EXAMPLE

Traditional Handoff:

Mrs. Cardinal, to learn more about managing your medications, I'd like to refer you to our PCN clinical pharmacist.

Warm Handoff:

Mrs. Cardinal, to learn more about managing your medications, I'd like you to meet with Sue. She's here today - we can stop by and I'll introduce you on the way out. She's a fantastic pharmacist who works with us. She knows all about the medications you're taking, and how to use them safely so that they work as well as possible. Our patients say that they find the extra support from Sue very helpful. She'll keep me up to date on what you talk about, and I'll still see you whenever you need to. How does that sound?

Introducing Your Role with Intention

For Team Members:

If a patient doesn't know you, or you haven't worked directly with them in the past, taking time to introduce your role in their care is important for building trust. A patient may not be familiar with your title or what you can offer. As well, patients who are unfamiliar with a team approach sometimes worry that they've been 'passed off' to someone else and don't understand why.

When combined with a warm handoff from the provider, taking a few extra minutes to introduce your role with intention can strengthen the relationship with the patient and ultimately result in better outcomes.

Some tips to consider:

- Be careful to explain your role in layman's terms – sometimes the language and acronyms that are commonly used amongst clinic team members are completely foreign to the patient.
- Explain what you'll do and what you won't do (e.g., work with them vs. tell them what to do).
- Reassure the patient that you're seeing them at the physician's request and that you work closely with him or her.
- Let the patient know that you will be communicating with the physician/NP and discussing the care plan.
- Check in with the patient to see if they have any comments, questions or concerns.

EXAMPLE

Traditional Introduction:

Hi Mr. Jones – I'm Paula the CDM-RN from the PCN. Dr. Chan asked me to see you about managing your diabetes.

Introduction with Intention:

Hi Mr. Jones – I'm Paula. I'm a nurse with special training in chronic diseases like diabetes. I work with several patients here at the clinic to help them better understand their conditions and what they can do to be as healthy as possible. Dr. Chan thought that you and I could work together on managing your diabetes. If you're interested in working with me, I'll make sure that Dr. Chan is kept up to date on what we discuss, and you can see him whenever you need to – just like always. My role isn't to tell you what to do. Instead, together we can find options and strategies that will work for you in your unique situation. Does that sound alright? Do you have any questions or concerns?