

Cardiac and Immunization Mini Toolkit



Small Tests of Change, Big Impact

According to the [Centers for Disease Control and Prevention](#) (CDC), people with heart disease and those who have suffered stroke are at higher risk for serious complications from certain diseases. Your patients with cardiac disease may have a harder time fighting off other diseases. Additionally, some vaccine-preventable diseases, like the flu, can increase their risk of another heart attack. **Vaccinating these patients is a key step in keeping them healthy.**

As your team works toward a healthier tomorrow, this mini toolkit serves as a menu of options to help you and your staff engage patients and families. When patients and families are partners in planning and making decisions in their care, health outcomes are better and patient experience and satisfaction improve.

The term “patient and family engagement” is used more and more often these days. But what does it really mean? Need a refresher or a quick summary to help introduce the concept to your staff? Check out the [Center for Advancing Health’s YouTube video](#).

Video is less than
three minutes long!



Once you feel confident in your team’s ability to engage patients and families, it is time to select a focus area for improvement. The tables on the following pages define change concepts, ideas to implement those concepts and tools, and resources to boost your efforts. Consider the concepts as a menu for your practice and simply choose an area for your team to launch an improvement initiative.

Plan-Do-Study-Act

Once you have selected a change idea from the menu to implement, work through a Plan-Do-Study-Act (PDSA) cycle with a small number of patients. This “small test of change” allows you to trial the change idea in your clinical setting. Once you are satisfied that the change works for both your patients and your staff, spread the change to include more patients, and then to your entire patient population.

Examples:

- [Cardiac Health PDSA: Blood Pressure Control](#)
- [Cardiac Health PDSA: Smoking Cessation](#)
- [The Model for Improvement](#)

Download and
print samples for
your team.



Sample items from our Cardiac Change menu or our Immunization Change Menu
are on the following pages.



Hypertension Change Concepts	Hypertension Change Ideas	Hypertension Tools & Resources
<p>Support Patients in hypertension (HTN) Self-Management During Their Routine Daily Activities (e.g., not related to any specific visit)</p>	<p>Use an online patient portal (or another approach) to provide patients with access to tools, information, and team members outside of face-to-face encounters—this approach can be used to address home blood pressure (BP) readings and other needs.</p>	<ul style="list-style-type: none"> • Strategies for Success with Your Patient Portal Video (staff-focused, 32:09 minutes) • The Impact of Patient Portals Video (staff-focused, 1:17 minutes) • Patient Portals: Patients' Perspectives Video (staff-focused, 2:59 minutes)
	<p>Ensure that self-management support provided to patients is helpful in their daily routine (e.g., when making food and lifestyle choices).</p>	<ul style="list-style-type: none"> • Self-Managing and Self-Management Support Video (patient-focused, 3:09 minutes) • Self-Monitored Blood Pressure Video (patient-focused, 4:07 minutes)
<p>Prepare Patients and Care Team Prior to Office Visit (e.g., via pre-visit patient outreach and team huddles)</p>	<p>Use a flowchart or dashboard with care gaps highlighted to support team huddles.</p>	<ul style="list-style-type: none"> • Introduction to the Huddle Video (staff-focused, 2:35 minutes) • Making Effective Use of the Huddle in Medical Practices Video (staff-focused, 5:59 minutes)
	<p>Design workflows and use tools to ensure that indicated orders/actions occur during the visit.</p>	<ul style="list-style-type: none"> • Million Hearts® Hypertension Treatment Protocols



Hypertension Change Concepts	Hypertension Change Ideas	Hypertension Tools & Resources
<p>Use Each Patient Visit Phase to Optimize HTN Management Intake (e.g., check-in, waiting, exam room placement)</p>	<p>Provide patients with educational materials to help them understand HTN and its implications.</p>	<ul style="list-style-type: none"> • High Blood Pressure Basics Video (patient-focused, 1:31 minutes) • Treating High Blood Pressure Video (patient-focused, 2:59 minutes) • Teaming Up with Patients Video (patient-focused, 2:02 minutes) • CDC Vital Signs: Getting Blood Pressure Under Control Video (patient-focused, 1:56 minutes) • Tips for Taking Blood Pressure Medicines As Directed Video (clinical staff-focused, 1:42 minutes) • Help Patients Take Blood Pressure Medicines As Directed Video (provider-focused, 1:25 minutes) • What Can I Do to Improve My Blood Pressure Patient Flyer
	<p>Provide patients with tools to support their visit agenda and goal setting.</p>	<ul style="list-style-type: none"> • Blood Pressure Tracker Patient Brochure

Cardiac Change Menu



Hypertension Change Concepts	Hypertension Change Ideas	Hypertension Tools & Resources
Use Each Patient Visit Phase to Optimize HTN Management Intake (e.g., check-in, waiting, exam room placement)	Measure, document, and repeat blood pressure (BP) correctly as indicated; flag abnormal readings.	<ul style="list-style-type: none"> • 7 Simple Tips to Get an Accurate BP Readings Provider Reference • The Detection and Management of High Blood Pressure Online Training Program (clinical staff-focused, 1.5 continuing credit units [CEUs]) • Measuring Blood Pressure in the 21st Century Video (clinical staff-focused, 27:39 minutes) • Blood Pressure Measurement Video (clinical staff-focused, 9:15 minutes)
	Use order sets (e.g., with prompts for med titration, increase compliance via prescribing from patient insurance formulary, using once daily/fixed dose combinations when possible) and standing orders to support evidence-based and individualized care.	<ul style="list-style-type: none"> • Million Hearts® Hypertension Treatment Protocols (customizable)
	On the patient portal, provide educational materials to support a low-sodium diet and exercise, as well as links to community resources or support groups.	<ul style="list-style-type: none"> • American Heart Association (AHA) Sodium Infographics (patient-focused)
Use Each Patient Visit Phase to Optimize HTN Management Intake (e.g., check-in, waiting, exam room placement)	Support medication adherence by providing clear written and verbal instructions and encouraging patients to use medication reminders.	<ul style="list-style-type: none"> • Tips for Taking Blood Pressure Medicines As Directed Video (patient-focused, 1:42 minutes) • Help Patients Take Blood Pressure Medicines As Directed Video (patient-focused, 1:25 minutes)

Immunization Change Menu



Immunization Change Concepts	Immunization Change Ideas	Immunization Tools & Resources
Support Patients in hypertension (HTN) Self-Management During Their Routine Daily Activities (e.g., not related to any specific visit)	Implement use of “checklist” to assess office workflow and practice readiness.	<ul style="list-style-type: none"> • Suggestions to Improve Your Immunization Services Checklist (clinical-staff focused)
	<p>Contact patients prior to appointment by phone, electronic recall/reminder system or via mail.</p> <p>Identify those who are due for vaccines and which vaccines are needed.</p>	<ul style="list-style-type: none"> • Reminder Systems and Strategies for Increasing Adult Vaccination Rates Webpage (clinical-staff focused)
	Incorporate immunization public service announcements (PSAs) into office on-hold messaging.	<ul style="list-style-type: none"> • Vaccination Radio Public Service Announcements (patient messaging)
	Design workflows and use tools to ensure that indicated orders/actions occur during the visit.	<ul style="list-style-type: none"> • Standing Orders for Administering Vaccines
Use Each Patient Visit Phase to Provide Immunization Education (e.g., check-in, waiting, exam room placement)	Share immunization videos on waiting room televisions.	<ul style="list-style-type: none"> • Adult Vaccination Videos (patient messaging)
	Distribute fun and educational resources, such as an immunization word search puzzles, during wait times.	<ul style="list-style-type: none"> • Immunization Word Search Puzzle
	Distribute appropriate vaccine information statement.	<ul style="list-style-type: none"> • Current Vaccine Information Statements (patient-focused)
	Implement standing orders for all routine vaccinations.	<ul style="list-style-type: none"> • Standing Orders for Administering Vaccines (clinical-staff focused)
Use Each Patient Visit Phase to Optimize Vaccine Maintenance (Encounter closing: e.g., checkout)	Provide all patients with documentation such as an immunization record card or a copy of the EMR immunization record. Schedule next appointment for routine vaccines as applicable.	<ul style="list-style-type: none"> • Immunization Record Cards (patient-focused)

Visit the [HSAG website](#) for additional resources.