

**IMPROVING PATIENT SAFETY
CULTURE IN PRIMARY CARE:**

Resource List to Accompany Patient Safety Culture Survey Results



ABOUT THE HEALTH QUALITY COUNCIL OF ALBERTA

The Health Quality Council of Alberta is a provincial agency that brings together patients, families, and our partners from across healthcare and academia to inspire improvement in patient safety, person-centred care, and health service quality. We assess and study the healthcare system, identify effective practices, and engage with Albertans to gather information about their experiences.

Our responsibilities are outlined in the Health Quality Council of Alberta Act.



PURPOSE OF THIS DOCUMENT

This document provides a list of references to websites and other publicly available, practical resources primary care clinics can use to improve patient safety culture and patient safety. While this resource list is not exhaustive, it is designed to give initial guidance to primary care clinics seeking information about patient safety initiatives.



HOW TO USE THIS RESOURCE LIST

Resources are organized by the Surveys on Patient Safety Culture™ (SOPST™) topic measures assessed in the Agency for Healthcare Research and Quality (AHRQ) Medical Office Survey on Patient Safety Culture, followed by general resources. For easy access to the resources, keep the file open rather than printing it in hard copy because many of the website URLs are hyperlinked and cross-referenced to other resources within the document.



RESOURCES BY TOPIC

The following resources are organized according to the relevant Medical Office Survey on Patient Safety Culture topic measures they are designed to help improve. Some resources are duplicated and cross-referenced because they may apply to more than one topic.



Note: This Resource List has been adapted from the [AHRQ resource list](#).
Updated November 15, 2024

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TOPIC #1

Communication About Error

1. Amy Edmundson – Psychological Safety

www.amycedmondson.com/psychological-safety

A webpage with various courses, books, articles, and educational videos pertaining to psychological safety. Theoretically, facilitating greater psychological safety in the workplace will encourage staff members to feel more comfortable communicating about errors.

2. HEC Creating a Safe Space Toolkit

www.healthcareexcellence.ca/media/zamhllhcq/5_creating-a-safe-space-toolkit_en-final-ua.pdf

Healthcare Excellence Canada (HEC) developed this toolkit to support healthcare leaders and policymakers to develop, implement or improve healthcare worker support programs, and introduce psychological safety. “The toolkit is divided into three tables:

- Table 1.1 includes resources for developing and improving peer support programs, and general psychological well-being resources.
- Table 1.2 includes resources that address psychological self-care in healthcare workers, such as fact sheets about psychological self-care and worksheets for developing a psychological self-care plan.
- Table 1.3 includes resources that address moral distress in the healthcare sector, such as links to moral distress projects currently being developed, fact sheets, toolkits, ethical decision-making frameworks, and PowerPoint presentations.”

3. TeamSTEPPS® (‘Communication’ and ‘Mutual Support’ modules)

- Canadian Essentials Course
www.healthcareexcellence.ca/en/what-we-do/all-programs/teamstepps-canada-essentials-course
- AHRQ TeamSTEPPS Program
www.ahrq.gov/teamstepps-program/index.html

TeamSTEPPS is a teamwork system designed for healthcare professionals that is:

- Evidence-based to improve communication and teamwork skills among healthcare professionals.
- A source for ready-to-use materials and a training curriculum to successfully integrate teamwork principles into all areas of your healthcare system.

4. HQCA Just Culture Webpage

www.justculture.hqca.ca

This Health Quality Council of Alberta (HQCA) website provides information and resources on creating “a just culture for patient safety – an atmosphere of trust in which healthcare workers are supported and treated fairly when something goes wrong with patient care. In a just culture, people feel safe to discuss errors and safety concerns without fear of blame.” The website provides resources that can help organizations establish a framework and actions to support a just culture, as well as tools for the fair assessment of staff involved in a patient safety incident.

5. Systematic Systems Analysis (SSA)

www.hqca.ca/wp-content/uploads/2022/11/HQCA-2022-SSA-Patient-Review-F2- web.pdf

This guidebook was authored by Dr. J.M. Davies and Carmella Steinke to help healthcare providers, administrators, and regulators conduct retrospective reviews of healthcare. The guidebook provides a practical approach for the investigation of adverse events or close calls in healthcare, with the intent of considering the entire system within the analysis and when recommending and making improvements.

6. HQCA Just Individual Assessment (JIA)

www.hqca.ca/resources-for-improvement/just-culture/systematic-systems-analysis-ssa-patient-safety-review-guidebook

This online guidebook describes the JIA and the steps and decisions involved in performing a full and fair JIA. A JIA defines a fair and consistent process for leaders to assess errors made by individual staff members involved in adverse events. Primarily, JIA encourages managers and leaders to consider the entire picture and address the systemic factors that may have led to that event.

7. HQCA A Guide to Disclosure of Harm

www.hqca.ca/resources-for-improvement/disclosure

Healthcare providers strive to deliver care that is safe. But things don't always go as planned, and sometimes people are harmed while receiving healthcare.

When this occurs, the person who has been harmed deserves to receive timely, open, respectful, and transparent communication. Disclosure is the practice that guides this communication.

The HQCA has collaborated with partner organizations, and patient and family advisors, to develop a Guide to Disclosure of Harm as a resource for healthcare professionals. Information for patients who have been harmed during healthcare is also available.

8. HEC Patient Safety and Incident Management Toolkit

www.healthcareexcellence.ca/en/resources/patient-safety-and-incident-management-toolkit

Healthcare Excellence Canada (HEC) provides a Patient Safety and Incident Management Toolkit with practical strategies and resources for staff to use to manage incidents effectively and keep patients safe. The toolkit includes three sections:

1. Patient Safety Management – Provides resources to help staff proactively anticipate patient safety incidents and prevent them from occurring.
2. Incident Management – Guides the actions taken after patient safety incidents occur.
3. System Factors – Describes factors that shape and are shaped by patient safety and incident management (e.g., legislation, policies, culture, people).

9. AMA Employee Handbook Template (Clinic Incident Report Form)

www.actt.albertadoctors.org/media/hwhmkion/employee-handbook.pdf

The Alberta Medical Association (AMA) provides a template of an employee handbook intended for use in primary care clinics. Clinics can use the guide to develop their own handbook, which can then be made readily available to staff members.

- Includes a clinic report form (pg. 28) to be completed by a staff member within 12 hours following a patient incident or an error.

10. Developing a Reporting Culture: Learning from Close Calls and Hazardous Conditions

www.psnet.ahrq.gov/issue/developing-reporting-culture-learning-close-calls-and-hazardous-conditions

“This new sentinel event alert from The Joint Commission explores how organizations can change their culture to promote reporting. It highlights bright spots: organizations that use a Just Culture approach to investigating errors; celebrate employees who report safety hazards; and have leaders who prioritize reporting. The Joint Commission proposes actions for all organizations, including developing incident reporting systems, promoting leadership buy-in, engaging in systemwide communication, and implementing transparent accountability structures. An Annual Perspective reviewed the context of the no-blame movement and the recent shift toward a framework of a Just Culture.”

11. HQCA Patient Concerns Management Framework

www.hqca.ca/wp-content/uploads/2021/11/HQCA_Patient_Concerns_Framework_062217.pdf

This HQCA framework provides guiding principles, a Patient Concerns Management Model, and suggest practical steps to help Alberta healthcare organizations develop consistent patient concerns management processes. It can also be used as an assessment tool for those with current practices and policies in place.

TOPIC #2

Communication Openness

1. TeamSTEPPS® ('Communication' and 'Mutual Support' modules)

- Canadian Essentials Course
www.healthcareexcellence.ca/en/what-we-do/all-programs/teamstepps-canada-essentials-course
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2. Safety Briefings and Safety Huddles

Two resources are available for conducting safety briefings and safety huddles with the goal of increasing safety awareness among frontline staff and helping develop a culture of safety.

a. AMA Team Huddles Guide

[www.actt.albertadoctors.org/file/Team-Huddles-Guide%20\(2\).pdf](http://www.actt.albertadoctors.org/file/Team-Huddles-Guide%20(2).pdf)

This guide provides an outline for performing morning, afternoon, and evening team huddles. It focuses on “finding strategies for quickly planning and re-planning the day’s activities to maximize communication and coordination.” “Huddles help teams to be more efficient and patient-centered, and they can be done daily, weekly, or as needed.”

b. Safety Huddle Results Collection Tool

www.ihl.org/resources/tools/huddles

(requires free account setup and login)

The daily huddle agenda gives teams a way to proactively manage quality and safety. This five-item agenda template can be adapted to meet local needs. Huddles enable teams to look back to review performance and to look ahead to flag concerns proactively.

3. HQCA Disruptive Behaviour Framework

www.hqca.ca/wp-content/uploads/2021/10/HQCA_Disruptive_Behaviour_Framework_041113.pdf

This framework helps organizations that deliver healthcare services address disrespectful behaviour and contribute to the creation of a healthy workplace. The framework highlights steps managers and leaders can take to address disruptive behaviour.

4. Shining a Light: Safer Health Care Through Transparency

www.ihl.org/resources/publications/shining-light-safer-health-care-through-transparency

(requires free account setup and login)

“Defining transparency as “the free flow of information that is open to the scrutiny of others,” this report recommends ways to bring greater transparency in four domains: between clinicians and patients; among clinicians within an organization; between organizations; and between organizations and the public. It makes the case that true transparency will result in improved outcomes, fewer medical errors, more satisfied patients, and lower costs of care. Case studies are included to document how transparency is practiced in each of the domains.”

TOPIC #3

Clinic Processes and Standardization

1. AMA Process Mapping

www.actt.albertadoctors.org/file/2017-dec-pact-box-1-process-map.pdf

The AMA has developed a guide with specific steps for creating a process map. A process map is a visual display of steps that should be taken within any process. “It illustrates who owns each step in a process and clearly identifies when hand-offs or communication flows between [staff members and/or patients]. By visualizing the current state of processes, it becomes easy to identify inefficiencies, duplication, variation, unnecessary steps, and missing steps. Process mapping generates awareness, discussion, engagement, and a broader perspective across the team.”

2. AMA Employee Handbook Template

www.actt.albertadoctors.org/media/hwhmkion/employee-handbook.pdf

The AMA provides a template of an employee handbook intended for use in primary care clinics. Clinics can use the guide to develop their own handbook, which can then be made readily available to staff members.

- Sections 1-8 act as template sections where standard policies and processes can be developed and listed for staff to follow.
- Appendix 3 details standard competencies crucial for staff members to be successful at work.

3. Create Contingency Plans

www.doctorsofbc.ca/managing-your-practice/business-pathways/managing-your-office/contingency-planning

Doctors of BC provide a toolkit that outlines the basic elements of emergency preparedness, business continuity, and personal contingency planning. The toolkit includes fillable templates and an easy-to-download template package.

4. Workflow Assessment for Health Information Technology Toolkit

www.healthit.ahrq.gov/health-it-tools-and-resources/workflow-assessment-health-it-toolkit

“A key to successful implementation of health information technology (IT) is to recognize its impact on both clinical and administrative workflow. Once implemented, health IT can provide information to help you reorganize and improve your workflow. This toolkit is designed for people and organizations interested or involved in the planning, design, implementation, and use of health IT in ambulatory care.”

TOPIC #4

Organizational Learning

1. HQCA Healthcare Quality & Safety Management Framework

www.hqca.ca/resources-for-improvement/frameworks/healthcare-quality-safety-management/

“This framework outlines what healthcare providers, managers, and executives need to do to effectively manage quality and safety in the healthcare system.” It describes three components of quality and safety management:

- Two models that highlight the important conceptual elements required to effectively manage healthcare quality and safety; and
- A foundational set of enablers to facilitate success.

2. AMA Website

www.albertadoctors.org/resource-centre/quality-improvement-resources/

The AMA website provides several tools and resources that can be used for implementing change in a primary care clinic, including quality improvement tools, change packages, and facilitator tools.

3. IHI Quality Improvement Essentials Toolkit

www.ihl.org/resources/Pages/Tools/Quality-Improvement-Essentials-Toolkit.aspx

(requires free account setup and login)

This IHI website includes many of “the tools and templates you need to launch a successful quality improvement project and manage performance improvement” (e.g., Cause-Effect diagram, Plan-Do-Study-Act worksheet).

4. Plan-Do-Study-Act (PDSA) Steps and Worksheet

www.ihl.org/resources/Pages/Tools/PlanDoStudyActWorksheet.aspx

(requires free account setup and login)

The Plan-Do-Study-Act (PDSA) cycle is shorthand for testing a change by developing a plan to test the change (Plan), carrying out the test (Do), observing and learning from the results (Study), and determining needed modifications (Act). The first website listed provides the steps in the PDSA cycle and the second website listed provides a PDSA Worksheet, a useful tool for documenting a test of change.

5. EvidenceNOW Key Drivers for Primary Care

www.ahrq.gov/innovations/will-work/index.html

The EvidenceNOW Key Driver Diagram shows six key drivers – big changes – that primary care practices make to build their capacity to implement the best evidence. For each key driver there are several change strategies – specific actions that support achievement of that key driver.

6. Systematic Systems Analysis (SSA)

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7. Health Quality Council of Alberta (HQCA) Human Factors Course

www.hqca.ca/resources-for-improvement/human-factors/human-factors-in-healthcare-course

Human factors studies the interrelationship between humans, the tools and equipment they use in the workplace, and the environment in which they work. After this course, staff will be able to:

- Understand and describe the applicability of human factors in healthcare across a variety of areas, including medication safety, procurement, and process evaluation.
- Recognize when human factors considerations or involvement is applicable in the work they do.
- Apply human factors practices to enhance quality improvement and patient safety.

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TOPIC #5

**Owner/
Managing
Partner/
Leadership
Support for
Patient Safety**

1. HEC Patient Safety Culture “Bundle” for CEOs/Senior Leaders

www.healthcareexcellence.ca/en/resources/patient-safety-culture-bundle

Healthcare Excellence Canada (HEC) has released a Patient Safety Culture “Bundle.” “The National Patient Safety Consortium Education Working Group has verified the critical role senior leadership plays in ensuring patient safety is an organizational priority.”

This training bundle provides a framework with various tools for establishing a patient safety culture, and it is directed at senior leadership. It “encompasses key concepts of safety science, implementation science, just culture, psychological safety, staff safety/ health, patient and family engagement, disruptive behaviour, high reliability/resilience, patient safety measurement, frontline leadership, physician leadership, staff engagement, teamwork/communication, and industry-wide standardization/alignment.”

2. TeamSTEPPS® (‘Leadership’ module)

- Canadian Essentials Course

www.healthcareexcellence.ca/en/what-we-do/all-programs/teamstepps-canada-essentials-course

- AHRQ TeamSTEPPS Program

www.ahrq.gov/teamstepps-program/index.html

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3. Patient Safety Leadership WalkRounds™

www.ihl.org/resources/Pages/Tools/PatientSafetyLeadershipWalkRounds.aspx

(requires free account setup and login)

“Senior leaders wishing to demonstrate their commitment to safety and learn about the safety issues in their own organization can do so by making regular rounds for the sole purpose of discussing safety with the staff.” This IHI tool discusses the benefits of management making regular rounds, give tips for doing the rounds, and provide links to related resources. These rounds are especially effective in conjunction with safety briefings.

4. Leading a Culture of Safety: A Blueprint for Success

www.ihl.org/resources/Pages/Publications/Leading-a-Culture-of-Safety-A-Blueprint-for-Success.aspx
(requires free account setup and login)

“Leading a Culture of Safety: A Blueprint for Success was developed to bridge a gap in knowledge and resources by providing chief executive officers and other healthcare leaders with a useful tool for assessing and advancing their organization’s culture of safety. This guide can be used to help determine the current state of an organization’s journey, inform dialogue with the board and leadership team, and help leaders set priorities.”

5. HQCA Healthcare Quality & Safety Management Framework

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This HQCA “framework outlines what healthcare providers, managers, and executives need to do to effectively manage quality and safety in the healthcare system.” It describes three components of quality and safety management:

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This framework helps organizations that deliver healthcare services address disrespectful behaviour and contribute to the creation of a healthy workplace. The framework highlights steps managers and leaders can take to address disruptive behaviour.

7. A Framework for Safe, Reliable, and Effective Care

www.ihl.org/resources/Pages/IHIWhitePapers/Framework-Safe-Reliable-Effective-Care.aspx
(requires free account setup and login)

The IHI’s Framework for Safe, Reliable, and Effective Care “describes the key strategic, clinical, and operational components involved in achieving safe and reliable operational excellence. The goal is to create a ‘system of safety,’ not just a collection of standalone safety improvement projects.”

TOPIC #6

Patient Care Tracking/ Follow-up

1. Patient Notification Toolkit

www.cdc.gov/healthcare-associated-infections/hcp/patient-notification-toolkit/?CDC_AAref_Val=https://www.cdc.gov/injectionsafety/pntoolkit/index.html

This toolkit provides guidance and resources to help organizations with “a patient notification following identification of an infection control lapse or disease transmission.”

2. Improving Your Laboratory Testing Process: A Step-by-Step Guide for Rapid-Cycle Patient Safety and Quality Improvement

www.ahrq.gov/hai/tools/ambulatory-care/lab-testing-toolkit.html

“The tools in this step-by-step guide can increase the reliability of the testing process in your clinic by helping you examine how tests are managed.” This guide tells you how to assess your clinic testing process, assess patient experience and documentation, plan for improvement, implement change, and reassess to determine if you improved.

3. AMA Screening Maneuvers Menu for Adults 2022 – Alberta Screening and Prevention (ASaP)

www.albertadoctors.org/resource-centre/asap-resources/asap-screening-maneuvers-menu

This menu guides primary care clinics in identifying the most important screening maneuvers for their patient panel, with the aim of improving screening and prevention rates through outreach methods and by offering appropriate testing for each maneuver. The menu identifies the age range and interval for each maneuver, as well as evidence-based practice points.

4. HQCA Primary Healthcare Panel Reports

www.hqca.ca/resources-for-improvement/primary-healthcare-panel-reports

The HQCA's panel reports uses administrative health data to provide information about a physician's patient panel. The reports provide information on their patients' continuity, and valuable data on their screening and vaccination statuses, chronic conditions, pharmaceutical use, and emergency and hospital visits. The reports can be used as a source of information to identify areas for improvement by:

- Informing panel management activities.
- Identifying gaps in screening and key preventive interventions.
- Better understanding characteristics of a patient panel, such as burden of illness.
- Understanding how patients utilize services outside of the clinic.

5. AMA Relational Continuity Change Package

www.albertadoctors.org/resource-centre/relational-continuity-resources/relational-continuity-change-package-summary

The AMA Relational Continuity Change Package assists primary clinics in optimizing processes for relational continuity.

6. Guide to Improving Patient Safety in Primary Care Settings by Engaging Patients and Families

www.ahrq.gov/patient-safety/reports/engage.html

The Agency for Healthcare Research and Quality (AHRQ) developed this guide as “a resource to help primary care practices partner with patients and their families to improve patient safety. The guide is composed of materials and resources to help primary care practices implement patient and family engagement to improve patient safety.”

TOPIC #7

Staff Training

1. TeamSTEPPS®

- Canadian Essentials Course
www.healthcareexcellence.ca/en/what-we-do/all-programs/teamstepps-canada-essentials-course
- AHRQ TeamSTEPPS Program
www.ahrq.gov/teamstepps-program/index.html

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2. AHRQ Patient Safety Education and Training Catalog

www.psnet.ahrq.gov/training-catalog

The AHRQ's Patient Safety Education and Training Catalog consists of patient safety programs currently available in the United States. The catalog, featured on AHRQ's Patient Safety Network site, offers a database of patient safety education and training programs, each tagged for easy searching and browsing. The database identifies a number of characteristics of the programs, including clinical area, program and learning objectives, evaluation measures, and cost.

3. HEC Patient Safety Culture "Bundle" for CEOs/Senior Leaders

www.healthcareexcellence.ca/en/resources/patient-safety-culture-bundle

Healthcare Excellence Canada (HEC) has released a Patient Safety Culture "Bundle." "The National Patient Safety Consortium Education Working Group has verified the critical role senior leadership plays in ensuring patient safety is an organizational priority." This training bundle provides a framework with various tools for establishing a patient safety culture, and it is directed at senior leadership. It "encompasses key concepts of safety science, implementation science, just culture, psychological safety, staff safety/health, patient and family engagement, disruptive behaviour, high reliability/resilience, patient safety measurement, frontline leadership, physician leadership, staff engagement, teamwork/communication, and industry-wide standardization/alignment."

4. AMA Employee Handbook Template

www.actt.albertadoctors.org/media/hwhmkion/employee-handbook.pdf

The Alberta Medical Association (AMA) provides a template of an employee handbook intended for use in primary care clinics. Clinics can use the guide to develop their own handbook, which can then be made readily available to staff members.

- New Staff Orientation section (pg. 8) – Intended to inform employees if new staff orientation exists, what it looks like, who is responsible for delivering the orientation, and how long it lasts.
- Training and Education section (pg. 15) – Intended to inform employees if they have compensation for training and education programs. This includes information on what programs they can claim, how much they will be compensated, and who approves the compensation for these programs.

TOPIC #8

Teamwork

1. TeamSTEPPS®

- Canadian Essentials Course
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2. Patient Safety Primer: Teamwork Training

www.psnet.ahrq.gov/primers/primer/8

“Providing safe healthcare depends on highly trained individuals with disparate roles and responsibilities acting together in the best interests of the patient.” The AHRQ’s Patient Safety Primer explains this topic further and provides links to more information on teamwork training.

3. Team Mapping

www.isu.familymed.ubc.ca/our-work/mapping-tools-resources/team-mapping

The University of British Columbia’s “The Innovation and Support Unit (ISU) has developed the Team Mapping Method to help developing team-based care initiatives (e.g., Primary Care Networks, and Patient Medical Homes) explore and describe how teams could be structured, ...help groups describe how roles work together in team-based care projects, [and]...help build a sense of cohesion and consensus across a group.” The ISU provides a facilitator toolkit for implementation.

4. AMA Interpersonal Style Colours Snapshot

www.actt.albertadoctors.org/file/coloursexercise-debriefguide.pdf

The AMA has developed a tool to help team members understand each other’s interpersonal style. Once each team member has completed the interpersonal style ‘colours exercise’, the results are shared between team members each other. The tool can help teams work together more effectively.

5. AMA Team Roles and Responsibilities (Enhanced Access)

www.albertadoctors.org/resource-centre/enhanced-access-resources/roles-and-responsibilities-enhanced-access

“This AMA template may be used to guide team discussions about assigning roles and responsibilities related to quality improvement and clinical tasks. Sample tasks are included but it is best to modify and adapt it to suit the tasks to each team’s specific needs.”

6. Establishing an Effective Team and Leading Productive Team Meetings

www.grandeprairiepcn.com/wp-content/uploads/2021/06/Establishing-an-Effective-Team-and-Leading-Productive-Team-Meetings1.pdf

This resource developed by the Grande Prairie Primary Care Network, outlines specific steps for establishing an effective team and team meetings (e.g., by identifying the team, setting a consistent meeting time, roles and participation, ground rules).

7. AMA Introducing Team Members with Intention – the “Warm Handoff”

www.albertadoctors.org/resource-centre/team-based-care-resources/introductions-with-intention/

“For some clinics, the concept of the patient seeing someone other than the primary provider for clinical care may be new. Patients may be concerned about this change of process and feel that they’re not getting the ‘best’ care. This guide provides tips to be strategic when introducing patients to team members for shared care.”

8. AMA Team Behaviours Assessment Tool

www.actt.albertadoctors.org/file/team-assessment--behaviours-old-to-new.pdf

A team assessment tool from the Alberta Medical Association (AMA) that is used to analyze team behaviours and changes in team following an intervention effort. It is suggested to use this assessment at the start of improvement efforts and again at six months to assess the team’s progress over time.

TOPIC #9

Work Pressure and Pace

1. AMA Ideal Panel Size Worksheet

www.albertadoctors.org/resource-centre/enhanced-access-resources/ideal-panel-size-worksheet

A calculator tool (in excel) that can be used to help determine an appropriate panel size based on appointments per day, workdays per week, weeks per year, statutory holidays, and revisit rate.

2. Advanced Access and Efficiency Workbook for Primary Care

www.hqontario.ca/Portals/0/documents/qi/elearning-and-events/aae-workbook-for-primary-care-en.pdf

This workbook outlines all of the fundamental information required to understand the concept of Advanced Access and Efficiency as well as the tools, measures and techniques which can be utilized to assist with implementation.

3. Virtual Patient Messaging Systems

Theoretically, virtual patient messaging systems can help reduce overall work pressure and pace by reducing the number of patients coming to the clinic to receive communications. A sample of the available tools include:

- Brightsquid Secure Mail – www.brightsquid.com/secure-mail
- Healthquest Patient Messaging – www.healthquest.ca/other-products/dr2dr/
- TELUS Health – www.telus.com/en/health
www.telus.com/en/health/health-professionals/clinics/collaborative-health-record#patient-engagement

4. TeamSTEPPS® ('Situation Monitoring' module)

- Canadian Essentials Course
www.healthcareexcellence.ca/en/what-we-do/all-programs/teamstepps-canada-essentials-course
- AHRQ TeamSTEPPS Program
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"The toolkit is divided into three tables:

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6. HQCA Primary Healthcare Panel Reports

www.hqca.ca/resources-for-improvement/primary-healthcare-panel-reports

The HQCA's panel reports use administrative health data to provide information about a physician's patient panel. The reports provide information on their patients' continuity and valuable data on their screening and vaccination statuses, chronic conditions, pharmaceutical use, and emergency and hospital visits. The reports can be used as a source of information to identify areas for improvement by:

- Informing panel management activities.
- Identifying gaps in screening and key preventive interventions.
- Better understanding characteristics of a patient panel, such as burden of illness.
- Understanding how patients utilize services outside of the clinic.

Patient Safety and Quality Issues

ACCESS TO CARE

1. Choosing Wisely Canada

www.choosingwiselycanada.org/primary-care/#recommendations

The Choosing Wisely Canada webpage provides information and resources with the goal of reducing wasteful or unnecessary medical tests, treatments, and procedures.

The website provides specific guidelines and resources for implementing recommendations to make change in areas such as primary care using antibiotics wisely, navigating serious illness conversations with patients and families, and further quality improvement resources.

2. Health Quality Ontario Advanced Access and Efficiency Workbook for Primary Care

www.hqontario.ca/Portals/0/documents/qi/elearning-and-events/aae-workbook-for-primary-care-en.pdf

This workbook outlines all of the fundamental information required to understand the concept of Advanced Access and Efficiency as well as the tools, measures and techniques which can be utilized to assist with implementation. The information is presented in a practical format and backed by the experience of numerous clinicians and change management consultants.

3. Health Quality Ontario Advanced Access and Efficiency for Primary Care Change Package

www.hqontario.ca/Portals/0/documents/qi/learningcommunity/charter%20and%20outreach/aae/pc-wave6-change-package-10412-en.pdf

This package describes the change concepts, or ideas for innovation, that have been shown to improve access and efficiency in primary care practices.

CHARTS AND MEDICAL RECORDS

1. Health Information Technology Toolkit for Physician Offices

www.healthit.gov/resource/health-information-technology-toolkit-physician-offices

“The Health Information Technology Toolkit for Physician Offices helps these healthcare organizations assess their readiness, plan, select, implement, make effective use of, and exchange important information about their clients. The toolkit contains numerous resources, including tools for telehealth, health information exchange, and personal health records.”

MEDICAL EQUIPMENT

1. Medical Device Evaluation Forms

www.tdict.wpengine.com/tools/medical-device-evaluation-forms

These forms were developed under the Training for Development of Innovative Control Technologies (TDICT) project with the aim of improving the overall evaluation and design of medical equipment and devices, and ultimately reducing occupational hazards for healthcare workers. This website includes forms for various medical equipment used in healthcare facilities and hospitals (e.g., Scalpels & Blades, Blood Collection Systems, Vascular Access Devices).

2. HQCA Human Factors Course

www.hqca.ca/resources-for-improvement/human-factors/human-factors-in-healthcare-course

Human factors studies the interrelationship between humans, the tools and equipment they use in the workplace, and the environment in which they work. After this course, staff will be able to:

- Understand and describe the applicability of human factors in healthcare across a variety of areas, including medication safety, procurement, and process evaluation.
- Recognize when human factors considerations or involvement is applicable in the work you do.
- Apply human factors practices to enhance quality improvement and patient safety.

MEDICATION

1. ISMP List of High-Alert Medications in Community/Ambulatory Healthcare

www.ismp.org/sites/default/files/attachments/2017-11/highAlert-community.pdf

This fact sheet provides a list of high-alert medications commonly used in ambulatory care and recommends strategies to reduce risk of errors.

2. Patient Safety Primer: Medication Reconciliation

www.psnet.ahrq.gov/primers/primer/1/medication-reconciliation

“Medication reconciliation refers to the process of avoiding inadvertent inconsistencies across transitions in care by reviewing the patient’s complete medication regimen at the time of admission, transfer, and discharge and comparing it with the regimen being considered for the new setting of care.” AHRQ’s Patient Safety Network explains this topic further and provides links for more information on what is new in medication reconciliation.

3. A Toolset for E-Prescribing Implementation in Physician Offices

www.digital.ahrq.gov/health-it-tools-and-resources/implementation-toolsets-e-prescribing/physician-offices

“The purpose of this toolset is to provide practices with the knowledge and resources to implement e-prescribing successfully. The toolset is designed for use by a diverse range of provider organizations, from small, independent clinics to large medical groups. The toolset also includes specific tools to support planning and decision making, such as surveys to determine whether an organization is ready for e-prescribing, worksheets for planning the implementation and monitoring progress, and templates for communicating the launch to patients.”

DIAGNOSTICS AND TESTS

1. AHRQ Toolkit for Engaging Patients to Improve Diagnostic Safety

www.ahrq.gov/diagnostic-safety/tools/engaging-patients-improve.html

Diagnostic errors occur in all care settings and one in three patients will experience a diagnostic error firsthand. Research suggests that communication breakdowns during the patient-provider encounter are a leading contributor to diagnostic errors.

To promote enhanced communication and information sharing within the patient-provider encounter, the Agency for Healthcare Research and Quality has developed a toolkit. This toolkit is designed to help patients, families, and health professionals work together as partners to improve diagnostic safety.

Information Exchange With Other Settings

1. AMA Community Information Integration Initiative and Central Patient Attachment Registry (CII/CPAR)

www.actt.albertadoctors.org/media/hbxd53gq/cii-cpar-information-sheet.pdf

The CII/CPAR “enables physicians and their teams to share patient information to Alberta Netcare directly from their electronic medical record (EMR)..., enhances communication amongst providers by enabling the sharing of important healthcare information across the province..., and sends eNotifications to providers when their patients are seen in the emergency department, or have a hospital admission or day surgery.”

2. AMA Home to Hospital to Home (H2H2H) Transitions Guide

www.albertahealthservices.ca/assets/info/hp/phc/if-hp-phc-phcin-hthth- guideline.pdf

A guideline for healthcare providers to help support patients as they access multiple providers and services on their journey from community to hospital and then back home. The guide aims to “help healthcare providers and teams in acute, primary, and community care operate as a singular entity with patients and their loved ones as equal partners.”

- Provides steps to support patients with confirmation of the primary care provider, admit notification, transition planning, referral and access to community supports, and follow up to primary care.

3. TeamSTEPPS® (‘Communication’ Module)

- Canadian Essentials Course

www.healthcareexcellence.ca/en/what-we-do/all-programs/teamstepps-canada-essentials-course

- AHRQ TeamSTEPPS Program

www.ahrq.gov/teamstepps-program/index.html

TeamSTEPPS is a teamwork system designed for healthcare professionals that is:

- Evidence-based to improve communication and teamwork skills among healthcare professionals.
- A source for ready-to-use materials and a training curriculum to successfully integrate teamwork principles into all areas of your healthcare system.

4. QuRe Referral Checklist

www.albertahealthservices.ca/assets/info/hp/arp/if-hp-arp-quire-digital-checklist.pdf

The Quality Referral Evolution (QuRE) working group created this checklist with the aim of improving referral communication between healthcare providers and their patients, ultimately to improve overall standards of care and healthcare access in Alberta. The checklist also comes with a readily available user guideline. It identifies crucial points of discussion between the provider and the patient (e.g., summary of patient's current status, purpose of consultation, follow up arrangements).

5. Health Information Exchange Projects

www.digital.ahrq.gov/health-information-exchange-hie-evaluation-toolkit

The AHRQ National Resource Center for Health IT has a toolkit for health information exchange projects. The toolkit offers suggestions and examples for evaluating the exchange of health information between various community stakeholders (e.g., providers, health departments, pharmacies, laboratories). Evaluation of data exchange is crucial to determining the impact of this new type of health IT project on healthcare quality and safety.

6. Transitions of Care Checklist

www.tnpharm.org/wp-content/uploads/Transitions_of_Care_Checklist.pdf

The National Transitions of Care Coalition Advisory Task Force has released a transitions of care list that provides a detailed description of effective patient transfer between practice settings. This process can help enhance communication to ensure that patients and their critical medical information are transferred safely, quickly, and efficiently.

Overall Ratings on Quality and Patient Safety

PATIENT CENTERED

1. HQCA Patient Concerns Management Framework

www.hqca.ca/wp-content/uploads/2021/11/HQCA_Patient_Concerns_Framework_062217.pdf

This HQCA framework provides guiding principles, a Patient Concerns Management Model, and suggests practical steps to help Alberta healthcare organizations develop consistent patient concerns management processes. It can also be used as an assessment tool for those with current practices and policies in place.

2. HEC Engaging Patients in Patient Safety

www.healthcareexcellence.ca/media/z2rgrtoj/engagingpatientsinpatientsafety_en_2020-final-ua.pdf

The purpose of the guide from HEC is “to help patients and families, providers and leaders work more effectively together to improve patient safety.” The guide highlights strategies to achieve patient partnerships at the point of care, at organizational and systems levels, and to evaluate patient engagement.

3. AHRQ The Guide to Improving Patient Safety in Primary Care Settings by Engaging Patients and Families

www.ahrq.gov/sites/default/files/wysiwyg/professionals/quality-patient-safety/patient-family-engagement/pfepprimarycare/pfepc-fullguide-final508.pdf

The Guide to Improving Patient Safety in Primary Care Settings by Engaging Patients and Families (the Guide) is a resource to help primary care practices partner with patients and their families to improve patient safety. The Guide includes materials and resources to help primary care practices implement patient and family engagement to improve patient safety.

4. CAHPS® Surveys

www.ahrq.gov/cahps/surveys-guidance/index.html

The Consumer Assessment of Healthcare Providers and Systems (CAHPS®) surveys aim to directly assess patient and family experiences with healthcare, more specifically patient experiences with providers, condition-specific care, health plans and programs, and facility-based care. This website provides information on the CAHPS® surveys, including the questionnaire and administration guidelines, as well as reporting and benchmarking data.

- CAHPS® Clinician & Group (CG-CAHPS®) Survey with Patient-Centered Medical Home (PCMH) Items
- CAHPS® Health Information Technology Item Set
- CAHPS® Health Literacy Item Set

5. Institute for Patient- and Family-Centered Care

www.ipfcc.org/resources/downloads-tools.html

“The Institute for Patient- and Family-Centered Care offers a wide variety of free downloadable PDFs to use in your organization.” This website features many free resources, including a toolkit to enhance safety and quality, and a work plan for starting a patient and family advisory council.

6. Primary Care Collaborative Promoting Whole-Person Care

www.thepec.org/policy/whole-person-primary-care

The Primary Care Collaborative website offers information and resources to support practices to implement whole-person care including the evidence base about the benefits, research about approaches, and an assessment to elevate the patient’s voices and understand what matters to them.

7. The Patient Education Materials Assessment Tool (PEMAT) and User’s Guide

www.ahrq.gov/professionals/prevention-chronic-care/improve/self-mgmt/pemat/index.html

“The Patient Education Materials Assessment Tool (PEMAT) is a systematic method to evaluate and compare the understandability and actionability of patient education materials. It is designed as a guide to help determine whether patients will be able to understand and act on information. Separate tools are available for use with print and audiovisual materials.”

EFFECTIVE

1. HQCA Quality Matrix

www.hqca.ca/about-us/our-mandate/the-alberta-quality-matrix-for-health

The HQCA “Quality Matrix enables the public, patients, providers, and organizations to see how levels of quality and areas of need might intersect” to identify areas for improvement. It has two components:

1. Columns with dimensions of quality; and
2. Rows highlighting areas of need.

TIMELY

Cross-reference to resources already described:

- See: [Patient Safety and Quality Issues, Access to Care.](#)

EFFICIENT

1. Choosing Wisely Canada

www.choosingwiselycanada.org/primary-care/#recommendations

The Choosing Wisely Canada webpage provides information and resources with the goal of reducing wasteful or unnecessary medical tests, treatments, and procedures.

The website provides specific guidelines and resources for implementing recommendations to make change in areas such as primary care using antibiotics wisely, navigating serious illness conversations with patients and families, and further quality improvement resources.

2. Going Lean in Healthcare

www.entnet.org/sites/default/files/GoingLeaninHealthCareWhitePaper-3.pdf

Examples in this IHI paper on lean thinking in healthcare show that, “when applied rigorously and throughout an entire organization, lean principles can have a dramatic effect on productivity, cost, quality”, and timely delivery of services.

EQUITABLE

1. Health Research and Educational Trust (HRET) Disparities Toolkit

www.hretdisparities.org

The Health Research and Educational Trust (HRET) Disparities Toolkit provides resources and information to help primary care clinics collect demographic information from patients, such as race, ethnicity, and primary language data. This toolkit helps clinics plan to improve quality of care for all populations.

Overall Perceptions of Patient Safety and General Resources

1. Actionable Patient Safety Solutions (APSS): Culture of Safety

www.s3-ap-southeast-2.amazonaws.com/wh1.thewebconsole.com/wh/4798/images/Patient-safety-Movement-PSMF-Volume_updated_2019.pdf

A guide that provides practical and tangible actions for creating and sustaining a culture of safety throughout a healthcare organization. The guide highlights a leadership plan, action plan, and strategies to measure outcomes after implementation efforts.

2. Patient Safety Primer: Culture of Safety

www.psnet.ahrq.gov/primers/primer/5

“The concept of safety culture originated outside healthcare in studies of high-reliability organizations.” These organizations “consistently minimize adverse events despite carrying out intrinsically complex and hazardous work. High-reliability organizations maintain a commitment to safety at all levels, from frontline providers to managers and executives. This commitment establishes a ‘culture of safety...’.” The AHRQ’s Patient Safety Network explains this topic further and provides links for more information on what is new in safety culture.

3. HQCA Human Factors Course

www.hqca.ca/resources-for-improvement/human-factors/human-factors-in-healthcare-course

Human factors studies the interrelationship between humans, the tools and equipment they use in the workplace, and the environment in which they work. After this course, staff will be able to:

- Understand and describe the applicability of human factors in healthcare across a variety of areas, including medication safety, procurement, and process evaluation.
- Recognize when human factors considerations or involvement is applicable in the work you do.
- Apply human factors practices to enhance quality improvement and patient safety.

4. HEC General Patient Safety Quality Improvement and Measurement Resources

www.healthcareexcellence.ca/en/what-we-do/all-programs/hospital-harm-is-everyones-concern/hospital-harm-improvement-resource/general-patient-safety-quality-improvement-and-measurement-resources

Healthcare Excellence Canada (HEC) provides “a list of patient safety, quality improvement and measurement resources that can be used by quality improvement teams, as well as resources for leaders.”

5. Healthcare Excellence Canada Patient Safety Essentials

www.healthcareexcellence.ca/en/what-we-do/all-programs/patient-safety-essentials

A free, six module, self-directed program designed especially for healthcare providers to help you understand the core of patient safety.

6. AHRQ Impact Case Studies

www.ahrq.gov/news/newsroom/case-studies/index.html?page=0

“AHRQ’s evidence-based tools and resources are used by organizations nationwide to improve the quality, safety, effectiveness, and efficiency of healthcare.” This subset of the Agency’s Impact Case Studies specific to patient safety “highlights these successes, describing the use and impact of AHRQ-funded tools by State and Federal policy makers, health systems, clinicians, academicians, and other professionals.”

7. CAHPS® Improvement Guide

www.ahrq.gov/cahps/quality-improvement/improvement-guide/improvement-guide.html

The extensive and growing use of Consumer Assessment of Healthcare Providers and Systems (CAHPS®) surveys has led to a greater understanding of patient and family experiences with healthcare and, consequently, areas requiring improvement have been identified. The CAHPS Improvement Guide aims to help leaders and staff take action after receiving survey results, address patient experiences, and advance the overall quality of healthcare services through new improvement interventions and resources.

9. Department of Defense Patient Safety Program Toolkits

www.health.mil/Military-Health-Topics/Access-Cost-Quality-and-Safety/Quality-And-Safety-of-Healthcare/Patient-Safety/Patient-Safety-Products-And-Services/Toolkits

The Department of Defense Patient Safety Program Toolkits provide various resources and guides to help foster increased patient safety culture within the Military Health System. These toolkits are “intended to be small, self-contained resource modules for training and application.” Available toolkits and guides include:

- Briefs and Huddles
- Debriefs
- Eliminating Wrong Site Surgery and Procedure Events
- MHS Leadership Engagement
- Patient Falls Reduction
- Professional Conduct
- Situation, Background, Assessment, Recommendation (SBAR)

10. IHI Framework for Improving Joy in Work

www.ihl.org/resources/Pages/IHIWhitePapers/Framework-Improving-Joy-in-Work.aspx
(requires free account setup and login)

This IHI white paper serves “as a guide for healthcare organizations to engage in a participative process where leaders ask colleagues at all levels of the organization, “What matters to you?” – enabling them to better understand the barriers to joy in work and co-create meaningful, high-leverage strategies to address these issues.”

11. CDC Hand Hygiene in Healthcare Settings

www.cdc.gov/clean-hands/hcp/clinical-safety

The Centers for Disease Control and Prevention’s Hand Hygiene in Healthcare Settings provides healthcare workers and patients with a variety of resources, including guidelines for providers and patient empowerment materials. Other resources include the latest technological advances in measuring hand hygiene adherence, frequently asked questions, and links to promotional and educational tools published by the World Health Organization, universities, and health departments.

12. HealthPartners Ambulatory Safety Toolkit

www.healthpartners.com/ucm/groups/public/@hp/@public/documents/documents/vgn_pdf_56420.pdf

This HealthPartners toolkit provides practical tools and suggestions that can be incorporated into clinical operations to eliminate harm due to error in the delivery of care.

13. National Committee for Quality Assurance (NCQA) Patient-Centered Medical Home Recognition

www.ncqa.org/Programs/Recognition/Practices/PatientCenteredMedicalHomePCMH.aspx

NCQA Patient-Centered Medical Home (PCMH) Recognition is the most widely used way to transform primary care practices into medical homes. The PCMH is a way of organizing primary care that emphasizes care coordination and communication to transform primary care into “what patients want it to be.” Medical homes can lead to higher quality and lower costs and can improve patients’ and providers’ experience of care.

14. National Action Plan To Advance Patient Safety

www.ihl.org/Engage/Initiatives/National-Steering-Committee-Patient-Safety/Pages/National-Action-Plan-to-Advance-Patient-Safety.aspx

(requires free account setup and login)

The IHI’s National Action Plan provides actionable and effective recommendations to advance patient safety by harnessing knowledge and insights from the National Steering Committee for Patient Safety (NSC). The site also includes a supplemental Self-Assessment Tool and Implementation Resource Guide and a Declaration to Advance Patient Safety issued by the NSC.

15. Patient Safety Primer: Medication Errors

www.psnet.ahrq.gov/primers/primer/23

A growing evidence base supports specific strategies to prevent adverse drug events (ADEs). AHRQ’s Patient Safety Network outlines strategies providers can use at each stage of the medication use pathway – prescribing, transcribing, dispensing, and administration – to prevent ADEs. These strategies range from computerized provider order entry and clinical decision support to minimizing nurse disruption and providing better patient education and medication labeling. The primer also identifies known risk factors for ADEs, including health literacy, patient characteristics, high-alert medications, and transitions in care.

16. Patient Safety Primer: Patient Safety in Ambulatory Care

www.psnet.ahrq.gov/primers/primer/16

Although the “vast majority of healthcare takes place in the outpatient, or ambulatory care setting, efforts to improve safety have mostly focused on the inpatient setting.

However, a body of research dedicated to patient safety in ambulatory care has emerged over the past few years. These efforts have identified and characterized factors that influence safety in clinic practice, the types of errors commonly encountered in ambulatory care, and potential strategies for improving ambulatory safety.”

17. Toolkit to Engage High-Risk Patients In Safe Transitions Across Ambulatory Settings

www.ahrq.gov/hai/tools/ambulatory-care/safe-transitions.html

This toolkit developed by the AHRQ is designed to help staff actively engage patients and their care partners to prevent errors during transitions of care.

18. WHO Patient Safety Curriculum Guide: Multi-Professional Edition

www.apps.who.int/iris/bitstream/handle/10665/44641/9789241501958_eng.pdf;jsessionid=A826E89C4BF966F0FF417818B7685CBF?sequence=1

The World Health Organization developed this guide to assist in the teaching of patient safety in universities and schools in the fields of dentistry, medicine, midwifery, nursing, and pharmacy. It also supports the ongoing training of all healthcare professionals. The first part of the guide contains contextual elements to help familiarize educators with patient safety, while the second part provides curriculum guide topics and ready-to-use patient safety teaching materials.