

### Step Three Tool-Inviting the PP to join the team

**Goal: To determine the PPs level of interest and capacity to join the team:**

- ☐ Thank the PP for the help that they have provided the Integrated Behavioral Health initiative
- ☐ Thank the PP for helping the team improve your clinic's abilities to provide better care
- ☐ Offer to share more information about your patient partnering goals

**Suggested language:** "Thank you so much for the insight you have already provided (*name of practice member*) about our integrating behavioral health and primary care initiative. And thank you also for agreeing to discuss this work again with me. We believe strongly that by including patients in these changes we will do it more successfully for our patients. Would you be interested in hearing more about an opportunity to continue to participate?"

**If yes:** We would like to invite two patients to partner with us directly by becoming members of our improvement team. This means that our Patient Partners would **attend team meetings** and participate in all team activities. Our Patient Partners role would be to **represent the patient** on the team. And help us remember **what matters most to patients** as we work together. Of course, our PPs would be paid for their time and participation. Do you think you might be interested in being involved in this way?

**If Yes:** I reflected on how your participation would be so helpful to us during team meetings. You are not afraid to speak up about what matters to patients. I think you would make a fantastic addition to our team. It should not take too much of your time, but it would require some flexibility in your schedule: Meetings are held **once a week for no more than two hours. They meet on: (be as specific as possible about times, days of the week and number of months expected for their participation)** and it will also involve a few additional hours outside of those meetings for orientation and online training activities.

**About the online activities:** Everyone on the team will participate in online training and education about what it takes to integrate behavioral health into a primary care clinic. For our Patient Partners, this would most likely involve an additional hour or two per week at home over the first month. These additional activities require that you have access to a computer with speakers or headphones and stable internet.

Do you think you might like to get more involved? If so, I would like to connect you to our Patient Partner Liaison who can give you more details and a better view of the full picture.

**Bulleted checklist of talking points: fill in the blanks with names and contact info)**

- ☐ Contact PP at the specified agreed upon follow up call time.
- ☐ Provide information about the IBHPC Initiative patient partnering goals
- ☐ Gather more information about the PP's level of interest, time available
- ☐ Ask if the PP has access to a computer device with stable internet either at home or another location to receive emails and participate in online team training opportunities.
- ☐ If the PP is interested in getting involved, introduce/connect the PP to the Patient Partner Liaison for more information
- ☐ Genuinely thank the PP for their time and interest in helping other patients.
- ☐ Follow up with Patient Partner Liaison (PPL) to confirm connection will be made
- ☐ Follow up with PPL to confirm status of PP decision to join the team

## More Sample Scripts for Inviting the PP to join the team

More sample scripts for demonstrating appreciation for PP insight: *Thank you so much for your time and energy thinking about this with me again. Your perspectives have already opened my eyes to things I didn't realize. **OR** Your perspective reminds me about things I often overlook when I get so busy trying to help patients. I really appreciate your honesty and willingness as well as the courage i know it takes to speak up about these things. I also realize how important this is to your health and to other patient's health as well. What you have shared can help me understand more about what my patients need, who don't always speak up. You have thought deeply about these things and I appreciate the time and effort it has taken you. In fact, you have been so helpful that I would like to know if you might be interested in continuing to help us?*

*(Pause for response)*

**Sample Script for Inviting the PP candidate to join the team: Please be sure to revise these scripts to match language and messages agreed upon by the entire practice team. Fill in all fields that are underlined in bold to match the Welcome Letter terms of agreement documents.**

*"Our insights gained from talking with some of our patients about the Initiative have convinced us that it would be very helpful to have the patient perspective right on our team, working together with us as we begin to plan, design and implement behavioral health services into our practice. We have decided to invite at least two patients or their carepartners as new members of the IBHPC Initiative team. We hope that this may interest you as you have demonstrated a sincere interest in helping us as well as other patients who may be experiencing similar conditions and challenges as you have faced. Would you like to hear more about how we would like to include patients on our team?"*

**If the PP is not interested in joining the team: end the call with appreciation, a desire to recieve their feedback in future and close the loop. (see instructions above)**

**If the PP candidate accepts the invitation to join the team:**

*I'm so glad! This is a real celebratory moment. Partnering with patients on quality improvements is new to our team and we are all very excited about it. I am so glad you have agreed to stay involved.*

*I am going to connect you to the person who is in charge of supporting new team members. This person name is (**name of PPL**)\_\_\_\_\_ he/she works here at our clinic as a (**role**)*

*\_\_\_\_\_.* How would you like her/him to contact you in the next day or so?

**(note email, preferred contact method)** *You can expect an email or a phone call from her/him in the next day or so. Please call me if for some reason you don't hear from her/him by (**include date**).*

*I am so glad I called you! Don't hesitate to call me. Talking with you has already had a valuable impact on me as a provider.*

