

Worksheet for Implementing an Office System: Tobacco Use Cessation

This worksheet will assist you in implementing an office system that ensures that, for every patient at every visit, tobacco use status is queried and documented, and brief advice/counseling and follow-up are offered. The appendices that accompany this worksheet are samples of organizational policies, screening tools and assessment forms, medical directives and order sets for pharmacotherapy for you to adapt and use in a way that best suits the practice of your organization.

Step 1 – State the policy statement or purpose: 1

Step 2 – List the definitions relevant to your organization’s needs: 1

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Step 1 – State the policy statement or purpose:

What is the goal of the policy?

“To discuss tobacco use and cessation with every patient within X organization using the 5A’s model of minimal contact intervention for tobacco cessation.”

“All staff involved in client assessment, either in person or by telephone, from X organization are required to query and document tobacco use and cessation interventions using the minimal contact intervention for tobacco cessation 5 As: Ask, Advise, Assess, Assist, Arrange protocol.”

Step 2 – List the definitions relevant to your organization’s needs:

What terms does the policy include that will need to be defined?

“Tobacco Products: include cigarettes, cigars, pipe tobacco, snuff, chewing tobacco, herbal cigarettes or contraband tobacco products.

5 A Model of Minimal Contact Tobacco Intervention: evidence-based approach to tobacco intervention that is advocated in many clinical best practice guidelines, designed to be implemented in less than three minutes. The 5 A Model consists of Ask, Advise, Assess, Assist and Arrange.”

Step 3 – Compile background information:

Provide evidence to support the policy actions:

- Prevalence of smoking in your community
- Costs associated with morbidity and mortality from tobacco use (health care costs, drug cost comparisons, losses in productivity, Potential Years of Life Lost, etc.)
- Effectiveness data for brief and intensive interventions by health care providers
- Increased quits and quit attempts post policy implementation
- Health effects of second and third-hand smoke exposure; outdoor restriction benefits

Step 4 – Decide on application/exclusion criteria:

Who will the policy apply to? Which staff members will be excluded from participating, if any?

- Who does the policy apply too?
- Who is not affected by the policy?

“This policy applies to all staff of X organization, members of the medical, dental and midwifery staff, learners, hospital affiliates (including contract and agency staff), students and residents who provide inpatient care at X organization.”

“This policy applies to the following staff of X organization: receptionists, students, dental assistants, dental hygienists and dentists.”

Step 5 – Outline operating details:

Describe in detail the requirements for policy implementation, enforcement and evaluation.

Implementation

1. Identification of tobacco users

Modify documentation forms to include the 5As protocol and ensure staff are aware of the new documentation process.

“Designated (name staff positions) staff are required to determine tobacco use status at X point of care (e.g. intake, initial assessment) by asking the question “have you used any form of tobacco products in the past 6 months?” Staff are required to complete and document the tobacco use questions on the X documentation form.”

- a. Determine when clients/patients will be asked about their tobacco use (e.g. intake, initial assessment)

- b. Add tobacco use screening questions to existing client/patient documentation or create a new tobacco use assessment/screening form (See Appendix A).

ASK about tobacco use at every opportunity.

Document client/patient tobacco use status on the appropriate documentation form. Document usage using the following categories:

Type(s) of tobacco used _____

Non-User ___ User ___ Ex-user ___ Quit date __d/m/y__

Amount smoked/used per day ___

2. For those clients/patients who have indicated that they are tobacco users.

“Designated (name of staff positions) staff are required to complete the 5 As protocol with all clients/patients who indicate they are tobacco users.”

ADVISE all tobacco users to quit.

“Designated staff are required to provide clients/patients advice to quit in a strong, personalized, non-judgemental manner and to document whether or not this advice was given on X documentation form. “

“As your X health care professional (e.g. dental hygienist, nurse, physician) the most important advice I can give you to improve X condition(s) is to quit using tobacco. “

Advice given ___ Advice not given ___

ASSESS all tobacco users’ readiness to quit.

“Designated staff are required to assess the clients/patients intentions to quit by completing the assessment questions on X documentation form. The staff must ask for the client’s permission to proceed with the assessment questions. If the client declines, the staff person documents this and does not proceed to complete the 5 As protocol.”

Various assessment tools can be used to measure readiness to quit, level of addiction and comorbidity. These measures will need to be added to documentation (see Appendix B for samples).

ASSIST all tobacco users in quitting.

“Designated staff will provide brief cessation education and counselling to interested clients/patients. Staff will provide interested clients/patients with a self-help educational package/materials containing the self-help booklet series from the Canadian Cancer Society’s Smokers’ Helpline.”

- Self-help materials provided (Smokers’ Helpline materials):
 - One Step at a Time: For Smokers Who Want to Quit
 - One Step at a Time: For Smokers Who Don’t Want to Quit
 - One Step at a Time: If You Want to Help a Smoker Quit

- Discuss stop smoking medications
- Review past quit experiences
- Identify triggers and brainstorm strategies
- Discuss alcohol and other drug use
- Assist patient to identify social support

Documentation should allow staff to check off which interventions they provided to the client/patient.

ARRANGE follow-up or referral.

Designated staff will discuss the following quit supports with all interested clients/patients , initiate follow-up protocols and document on X form:

1. *“For clients/patients wishing pharmacotherapy assistance staff will contact the designated medical professional (e.g. Dentist, Nurse Practitioner, Physician, Pharmacist, Optometrist) to arrange for the implementation of pre-printed orders (if available) or to arrange for an appointment.”*
2. *“Designated staff will discuss community based quit supports with the client/patient and provide literature/referrals if requested by the client/patient.”*
3. *“Designated staff will ask clients/patients if they would like Smokers’ Helpline to call them directly. If the client/patient consents to this service, the staff person will complete a Smokers’ Helpline Quit Connection Fax Referral Form when the client/patient is present. All fax form fields must be completed and faxed within 2 business days.”*

For information about the Smokers' Helpline fax referral program and a copy of the fax form see Appendix D1.

Procedures for initiating pharmacotherapy

- a. Pre-printed orders (See Appendix C1)
- b. Guidelines for NRT dosing/medical directives (See Appendix C2, C3, C4)

Patient Education Materials

Provide staff with access to patient education materials to offer during the tobacco cessation intervention.

1. *The Smokers' Helpline "One Step at a Time" series materials will be ordered and put into client/patient self-help packages by X staff member/volunteer and placed in relevant practice locations. This staff person will monitor supplies of these resources and will restock as needed.*
2. *A supply of Smokers' Helpline Quit Connection Forms will be maintained in relevant practice areas by X staff member/volunteer. This staff member/volunteer will monitor supplies of these resources and will restock as needed.*
3. *Designated staff are required to discuss and offer a self-help package to all interested clients/patients at the ASSIST stage of the 5 As protocol.*

Step 6 – Set up a process to monitor the implementation of the Office System

How will the policy be monitored and evaluated in your organization?

1. *"Staff from X will ensure the creation and maintenance of a MCI Policy Advisory Committee and chair meetings as required. A minimum of X meetings will be held/year."*
2. *"The policy will be monitored and reviewed annually by the Advisory committee with membership from the various disciplines participating in policy implementation. These committee members will act as "Champions" for policy implementation, monitoring and evaluation." For an example of an Advisory Committee Terms of Reference see appendix F.*
3. *"Once the policy has been implemented, documentation audits will be completed within 3-6 months of the policy implementation date to determine smoking prevalence, staff compliance with policy implementation, pharmacotherapy initiation, cessation services provided and referrals to community resources (e.g. fax referrals). (There may also be other outcomes that you would like to track which you can include).*
4. *"Documentation audits will be repeated as needed."*
5. See Region of Waterloo – MCI Policy Learn Document: <http://www.ptcc-cfc.on.ca/english/Training/Individual-Workshop-Listing/?rid=179>

Step 7 – Ensure all staff are trained and provide continuing education opportunities

Are all staff aware of the policy and procedures, and do all staff feel comfortable providing cessation interventions to clients/patients?

1. *All staff will receive training in tobacco cessation best practices in their orientation.*
2. *“Staff will participate on the MCI Advisory Committee to remain up-to-date on policy implementation and evaluation.”*

“All staff will be required to complete/attend the following trainings (provide listing with training opportunities from www.youcanmakeithappen.ca) and provide proof of completion to their supervisor (e.g. certificate, attendance list).” For example; St. Joseph’s Health Care Hamilton have created online tutorials at the following link:

<http://medlearn.stjosham.on.ca/stjosham-shared/learningstudio/index.cfm?fuseAction=MyLearningCenter.LandingPage&tab=&ItemId=751>

Updated cessation training opportunities for your staff can be found at
www.youcanmakeithappen.ca