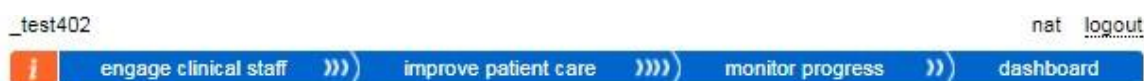


Supplementary File 14: Screenshots of final version of Intervention 2 - Enhanced Follow On, web-based Toolkit



What is the Affinitie toolkit?

Audit and feedback, as currently practised in hospitals, can result in an 8% improvement to the quality of patient care¹. The Affinitie toolkit was developed by behavioural science researchers, in collaboration with transfusion staff in the NHS, to increase the effectiveness of audit and feedback in the area of blood transfusion.

The toolkit was designed to help Transfusion Practitioners, and the wider Hospital Transfusion Team, plan and respond effectively to feedback from the National Comparative Audit Office. Three main objectives are outlined in the toolkit:

1. **Engage clinical staff** by identifying effective dissemination pathways
2. **Improve patient care** through goal-directed planning
3. **Monitor progress** through QuickAudit

It is recommended that this toolkit should be used alongside the feedback documents provided by the National Comparative Audit, ideally as soon as possible after they have been received.

How to Use the Affinitie Toolkit?

The menu at the top of the screen will help you to navigate and track your progress through the toolkit.

Clicking on the information icon in the menu bar at the top left of the screen will bring you back to this page about how to use the toolkit and its theoretical background.

Each of the tools in the Affinitie toolkit has been designed to help you complete a specific task in your response to feedback from an audit. The information you enter into each of these tools will be used to auto-fill sections found later in the toolkit to save both time and effort. Along the way you will be given updates showing your progress. Each tool has detailed instructions showing you how it can be used.

Your dashboard will keep you up to date as you make progress through the process of responding to feedback from an audit. Here you will be able to gain an overview of your goals and actions as well as your progress towards meeting goals. You will be able to print PDF files for each of the tools as well as your overall progress. Finally, there is a reset button that will permanently remove any information you have added and reset the toolkit to its initial state.

Engage Clinical Staff: Dissemination Cascade

The Dissemination Cascade tool helps you identify the most effective pathways to provide feedback to staff within your hospital or trust. This tool will help you identify staff

- involved in transfusion decision-making, and
- responsible for disseminating feedback.

Each of the dissemination choices you indicate here will appear as a goal in your Action Planning tool when you click 'My Dissemination Cascade is complete'.

To undo or redo any recent changes made to this tool, you can use the undo or redo buttons located beneath the tool.

Click to hide step-by-step instructions

The Dissemination Cascade lists groups of staff that you might want to share feedback with following an audit.

next step →

Transfusion Practitioner disseminates to...

▶ Hospital Transfusion Committee

What is disseminated? enter value

How are they informed? enter value

When by? select date

Named contact? enter name

▶ Hospital Transfusion Team

What is disseminated? enter value

How are they informed? enter value

When by? select date

Named contact? enter name

Transfusion Practitioner disseminates to...

▶ Hospital Transfusion Committee

What is disseminated? enter value

How are they informed? enter value

When by? select date

Named contact? enter name

▶ Hospital Transfusion Team

What is disseminated? enter value

How are they informed? enter value

When by? select date

Named contact? enter name

▶ Audit Department

What is disseminated? enter value

How are they informed? enter value

When by? select date

Named contact? enter name

Engage Clinical Staff: Fishbone Analysis

The Fishbone Analysis tool will help you to identify potential barriers to responding effectively to feedback from an audit. It will suggest solutions that will help with staff engagement and prompt you to expand on these or suggest a solution of your own. Each of the ribs of the Fishbone is a barrier/solution pair.

Each of the solutions you enter here will appear as a goal in your Action Planning tool when you click 'My Fishbone Analysis is complete'.

To undo or redo any recent changes made to this tool, you can use the undo or redo buttons located beneath the tool.

[Click to see step-by-step instructions for using the Fishbone Analysis tool](#)

The interface is divided into several sections:

- barriers:** A list of six text boxes containing the following barriers:
 - Communication is a problem between different areas of the hospital
 - The feedback documents are not engaging for clinical staff
 - Some individuals do not feel that disseminating feedback is part of their role
 - Clinical staff do not seem motivated to read the feedback documents
 - Staff involved in target transfusion behaviour not present when feedback is discussed
 - Feedback is not reaching a person or group
- solutions:** A list of six text boxes, each containing the placeholder text "describe a solution".
- suggested solutions:** A list of six orange boxes containing the following suggestions:
 - Create posters to prompt and remind staff and display them
 - Seek out a local champion to disseminate feedback further
 - Discuss roles and responsibilities with key individuals
 - Arrange a 1:1 discussion with the relevant staff
 - Remind clinical staff of the impact on patient care if we don't reach audit standards
 - Create summary materials to outline the key feedback messages and impact for patient care
- Controls:**
 - Undo and redo buttons at the bottom left.
 - A "My Fishbone Analysis is complete" button at the bottom center.
 - A "Not modified yet" status indicator below the completion button.

Engage Clinical Staff: Action Planning

The Action Planning tool builds on the work you have already done to engage clinical staff. Here the goals you set using the Dissemination Cascade and Fishbone Analysis tools are brought together and you are provided with a template to help make these goals **SMART**: **S**pecific, **M**easurable, **A**chievable, **R**elevant and **T**imely. You can also monitor your progress and return to the Action Planning tool as your goals have been met, helping you to keep a clear record of your performance. Specific goals and action plans are effective in changing practice.

If you want to add or delete information from the Action Planning tool then you do this by updating either the Dissemination Cascade tool or the Fishbone Analysis tool as appropriate.

To undo or redo any recent changes made to this tool, you can use the undo or redo buttons located beneath the tool.

Click to see step-by-step instructions for using the Action Planning tool

sort actions by: **tool** ▾ **due date** ▾ status ▾

Seek out a local champion to disseminate feedback further			
Our action plan		How will we know how we are doing	
When?	20 Jul 2017	Expected completion	20 Jul 2017 Thursday
Where?	Surgical ward A	Evidence recorded	enter measure
With whom?	Al	Who is responsible?	enter name
		Actual completion date	select date

Create summary materials to outline the key feedback messages and impact for patient care			
Our action plan		How will we know how we are doing	
When?	27 Jul 2017	Expected completion	27 Jul 2017 Thursday
Where?	Office	Evidence recorded	enter measure
With whom?	Jan	Who is responsible?	enter name
		Actual completion date	select date

TP disseminates (Feedback report) to Hospital Transfusion Committee			
Our action plan		How will we know how we are doing	
When?	28 Jul 2017	Expected completion	28 Jul 2017 Friday
Where?	Email	Evidence recorded	enter measure
With whom?	Helen	Who is responsible?	enter name
		Actual completion date	select date

undo redo

My Action Plan is complete

Last modified a few seconds ago by you via the dissemination cascade tool

Improve Patient Care: Selecting Standards

The Selecting Standards tool will help you choose which of the National Comparative Audit of Blood Transfusion standards to monitor in order to improve patient care. Each of the standards you select here will then be carried forward as a goal to help in your Action Planning. Start by **choosing one or two standards** to target that you think are particularly relevant to your hospital or trust. These could be the standards you think will be the easiest to achieve, or that you think will have the most impact on patient care. You can use progress in meeting these standards to positively motivate staff and can re-visit this tool to target other standards.

Each of the standards you choose here will appear as a goal in your Action Planning tool when you click 'My Standards are selected'.

To undo or redo any recent changes made to this tool, you can use the undo or redo buttons located beneath the tool.

Click to see step-by-step instructions for using the Selecting Standards tool

Standard 1: Clinical staff should measure Hb prior to transfusion of red blood cells in haematology patients (within 24 hours for inpatients and 72 hours for day patients).

When will we review?	21 Jun 2017	Wednesday
Where will it be applied?	enter place	
Who will enforce?	enter name	
NCA audit performance	enter your current performance	
Reason for selection	enter brief explanation	

Standard 2: Clinical staff should only transfuse red blood cells in normovolaemic haematology inpatients without additional risk factors (cardiovascular disease or signs or symptoms of cardiovascular compromise, severe sepsis or acute cerebral ischaemia) if their pre-transfusion Hb is less than 70g/L. (within 24 hours).

When will we review?	select date	
Where will it be applied?	enter place	
Who will enforce?	enter name	
NCA audit performance	enter your current performance	
Reason for selection	enter brief explanation	

Standard 3: Clinical staff should only transfuse red blood cells in haematology inpatients with cardiovascular disease or signs or symptoms of cardiovascular compromise if their pre-transfusion Hb is less than 80g/L. (within 24 hours).

When will we review?	select date	
Where will it be applied?	enter place	
Who will enforce?	enter name	
NCA audit performance	enter your current performance	
Reason for selection	enter brief explanation	

Standard 4: Clinical staff should only transfuse red blood cells in haematology patients with severe sepsis or acute cerebral ischaemia if their pre-transfusion Hb is less than 90g/L. (within 24 hours for inpatients and 72 hours for day patients).

When will we review?	select date	
Where will it be applied?	enter place	
Who will enforce?	enter name	
NCA audit performance	enter your current performance	
Reason for selection	enter brief explanation	

Standard 5: Clinical staff should only transfuse red blood cells in haematology patients receiving radiotherapy if their pre-transfusion Hb is less than 100g/L. (within 24 hours for inpatients and 72 hours for day patients).

When will we review?	select date	
Where will it be applied?	enter place	
Who will enforce?	enter name	
NCA audit performance	enter your current performance	
Reason for selection	enter brief explanation	

Improve Patient Care: Fishbone Analysis

The Fishbone Analysis tool will help you to identify potential barriers that may prevent you from meeting the one or two National Comparative Audit of Blood Transfusion standards that you chose in the selecting standards tool. These selected standards are the ones that you think are particularly relevant to your hospital or trust: these could be the standards you think will be the easiest to achieve, or that you think will have the most impact on patient care. This tool will suggest solutions that will help improve patient care and prompt you to expand on these or suggest a solution of your own. Each of the ribs of the Fishbone is a barrier/solution pair.

Each of the solutions you enter here will appear as a goal in your Action Planning tool when you click 'My Fishbone Analysis is complete'.

To undo or redo any recent changes made to this tool, you can use the undo or redo buttons located beneath the tool.

[Click to see step-by-step instructions for using the Fishbone Analysis tool](#)

barriers	solutions	suggested solutions
There are no specific recommendations for improving patient care	describe a solution	Identify alternative ways to incorporate transfusion into induction sessions
There is no transfusion training for clinical staff after induction	describe a solution	Create posters to prompt and remind staff and display them
The Trust is not meeting the standards of patient care outlined in the audit	describe a solution	Seek out a local champion to disseminate feedback further
Feedback states our patient care is worse than other hospitals	describe a solution	Create summary materials to outline the key feedback messages and impact for patient care
Clinical staff are not aware of guidelines or standards	describe a solution	Develop positive messages of encouragement and support and send them
Clinical staff are reluctant or resistant to change	describe a solution	Create locally relevant SMART goals and discuss them with the relevant person or group
Clinical staff do not feel confident in changing their practice	describe a solution	Design training sessions for relevant staff, tailored to the needs and requirements of the target

undo redo

My Fishbone Analysis is complete

Not modified yet

Improve Patient Care: Action Planning

The Action Planning tool builds on the work you have already done to plan improvements to patient care. Here the goals you set using the Selecting Standards and Fishbone Analysis tools are brought together and you are provided with a template to help make each of these goals **SMART**: **S**pecific, **M**easurable, **A**chievable, **R**elevant and **T**imely. You can also monitor your progress and return to the Action Planning tool as your goals have been met, helping you to keep a clear record of your performance. Specific goals and action plans are effective in changing practice.

If you want to add or delete information from the Action Planning tool then you do this by updating either the Selecting Standards tool or the Fishbone Analysis tool as appropriate.

To undo or redo any recent changes made to this tool, you can use the undo or redo buttons located beneath the tool.

[Click to see step-by-step instructions for using the Action Planning tool](#)

sort actions by: tool ▾ due date ▾ status ▾

Meet Standard 1	
Our action plan	How will we know how we are doing
When? 21 Jun 2017	Expected completion 21 Jun 2017 Wednesday
Where?	Evidence recorded enter measure
Who will enforce?	Who is responsible? enter name
	Actual completion date select date

undo redo

My Action Plan is complete

Last modified a few seconds ago by you via the selecting standards tool

[next: poster](#) [dashboard](#)

Improve Patient Care: Poster

You can download an individualised poster template showing the one or two standards you have chosen to target because they are particularly relevant to your hospital or trust. In order to generate this poster template you first need to complete the Selecting Standards tool. When you click the 'Download my poster template' button you will get a Word document that you can then edit and style on your own computer.

This poster can be displayed in your hospital to communicate the key messages from the audit and the standards that you are aiming to improve.

[Download my poster template](#)

Last modified a few seconds ago by you via the selecting standards tool

[next: QuickAudit](#) [dashboard](#)

Monitor Progress: QuickAudit

The QuickAudit tool provides a quick and easy way to re-audit cases following the implementation of your Action Plan. It is used to record selected information, from sources such as case notes or laboratory records, which will help you monitor your progress in improving the standards you selected as being particularly relevant to your hospital or trust. The QuickAudit tool can be used to monitor a maximum of 5 standards. You can enter data online or download a PDF version of the table if you need to record the data away from the computer. Decide who needs to see the results of QuickAudit and feed back accordingly. You can use the poster tool to help you publicly display your progress in improving standards.

To undo or redo any recent changes made to this tool, you can use the undo or redo buttons located beneath the tool.

We would like to acknowledge John Grant-Casey from the National Comparative Audit of Blood Transfusion for developing QuickAudit.

[Click to see step-by-step instructions for using the QuickAudit tool](#)

Patient reference	Who decided to transfuse?	Standard 1	
enter patient	enter name	met not met n/a	⊕ ⊖
enter patient	enter name	met not met n/a	⊕ ⊖
enter patient	enter name	met not met n/a	⊕ ⊖
enter patient	enter name	met not met n/a	⊕ ⊖
enter patient	enter name	met not met n/a	⊕ ⊖
enter patient	enter name	met not met n/a	⊕ ⊖
enter patient	enter name	met not met n/a	⊕ ⊖
enter patient	enter name	met not met n/a	⊕ ⊖
enter patient	enter name	met not met n/a	⊕ ⊖
enter patient	enter name	met not met n/a	⊕ ⊖
enter patient	enter name	met not met n/a	⊕ ⊖
enter patient	enter name	met not met n/a	⊕ ⊖
enter patient	enter name	met not met n/a	⊕ ⊖
enter patient	enter name	met not met n/a	⊕ ⊖
enter patient	enter name	met not met n/a	⊕ ⊖
enter patient	enter name	met not met n/a	⊕ ⊖
enter patient	enter name	met not met n/a	⊕ ⊖
enter patient	enter name	met not met n/a	⊕ ⊖
enter patient	enter name	met not met n/a	⊕ ⊖
enter patient	enter name	met not met n/a	⊕ ⊖
enter patient	enter name	met not met n/a	⊕ ⊖

undo redo

My QuickAudit is complete

Last modified 2 months ago by you via the selecting standards tool

[i](#) [engage clinical staff](#) [improve patient care](#) **[monitor progress](#)** [dashboard](#)

[QuickAudit](#) [poster](#)

Monitor Progress: Poster

You can download an individualised poster template representing your ongoing performance in meeting the one or two standards you have chosen to target because they are particularly relevant to your hospital or trust. In order to generate this poster template you first need to complete the QuickAudit tool. When you click the 'Download my poster template' button you will get a Word document that you can then edit and style on your own computer.

This poster can be displayed in your hospital to communicate progress towards your goals following QuickAudit.

[Download my poster template](#)

Last modified 5 minutes ago by you via the selecting standards tool

[dashboard](#)



Your Affinitie Toolkit Progress Dashboard

Your Affinitie Toolkit progress dashboard keeps track of the tools you have been using to respond to feedback and allows you to monitor your progression towards particular goals. It keeps a record of when you have completed your work using each of the tools and shows the latest actions that you or other members of staff at your hospital or trust have undertaken using each tool. The dashboard also allows you to create a PDF report for each of the individual tools you have used, and for your overall progress in the toolkit. These will provide a useful status update that you can present at meetings and circulate to staff involved in transfusion decision-making.

The 'reset all tools' button permanently removes any information you have added to the toolkit and resets all the tools to their initial state.

engage clinical staff

dissemination cascade

complete

pdf

Last modified a few seconds ago by you

fishbone analysis

complete

pdf

Last modified a few seconds ago by you

action planning

ongoing

pdf

Last modified a few seconds ago by you via the dissemination cascade tool

Seek out a local champion to disseminate feedback further
20 Jul 2017, Surgical ward A, with Al
record by 20 Jul 2017

Create summary materials to outline the key feedback messages and impact for patient care
27 Jul 2017, Office, with Jan
record by 27 Jul 2017

TP disseminates (Feedback report) to Hospital Transfusion Committee
28 Jul 2017, Email, with Helen
record by 28 Jul 2017

improve patient care

selecting standards

complete

pdf

Last modified a few seconds ago by you

fishbone analysis

ongoing

pdf

action planning

ongoing

pdf

Last modified a few seconds ago by you via the selecting standards tool

Meet Standard 1
21 Jun 2017
record by 21 Jun 2017

poster

complete

docx

Last modified a few seconds ago by you via the selecting standards tool

monitor progress

QuickAudit

complete

pdf

Last modified a few seconds ago by you

poster

complete

docx

Last modified a few seconds ago by you via the selecting standards tool

download tool summary as PDF

Anonymously share toolkit statistics with the Affinitie research team (NHS Approval Reference 14/EM/1295)

Last modified 2 months ago by you

