

How to Use Upstream Patient Education Materials

A guide for support staff and clinicians providing contraceptive counseling and education.

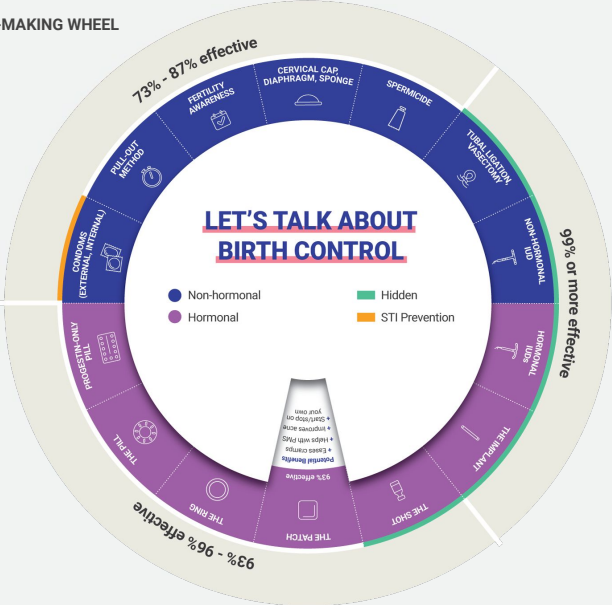
Quality materials can help to engage patients, enable conversations between them and their providers and inform them about their birth control options. The healthcare team should use their knowledge of contraceptive options and patient education materials to support the patient (Pt) in choosing a method that aligns with their stated preferences and goals.



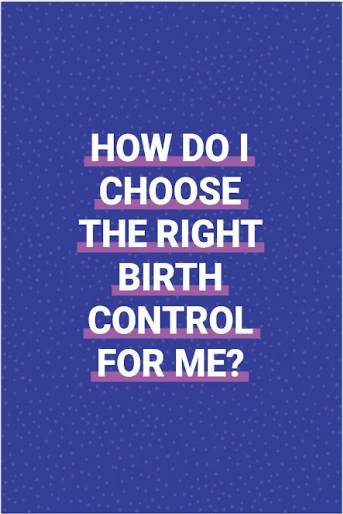
Healthcare team role

Ex: Certified Nurse Midwife (CNM), Clinician, Licensed Professional Nurse (LPN), Medical Assistant (MA), Nurse Practitioner (NP), Registered Nurse (RN), Triage Nurse

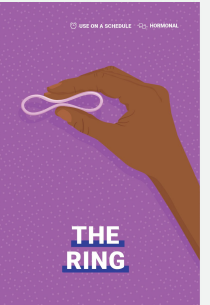
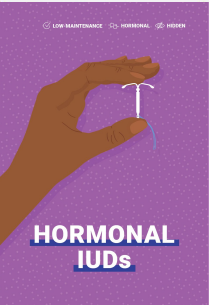
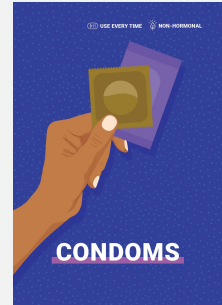
DECISION-MAKING WHEEL



WELCOME BOOKLET



POSTCARDS



Materials for every step of the in-health center journey

WAITING ROOM

Set tone for experience



Welcome Booklet
Posters
Swag

CONSULTATION

Enable self-guided learning



Postcards

CONSULTATION

Facilitate conversations



Decision-Making wheel
Postcards

BEYOND CLINIC

Encourage ongoing learning



Printer-friendly one-pagers
[Upstream.org/birthcontrol](https://upstream.org/birthcontrol)
Swag

Before beginning...

- Ask the PISQ or review the patient's PISQ response if it is already recorded in the EHR or on their intake form.
- Ask permission from the patient to discuss contraception.
- If using these materials in telehealth settings, ensure that the platforms you are using are HIPAA-compliant. Please be aware of the HIPAA disclosures you may need to make to your patients before using these platforms for appointments and communication.
- Please note that our materials do not provide after-care instructions or medical eligibility. This should be addressed by the provider during the visit.

WELCOME BOOKLET

Upstream's Welcome Booklet helps patients feel **more prepared for their appointments** by consolidating frequently asked questions, myths and misconceptions, and providing a snapshot of all methods.

The booklet helps patients **identify their top priorities** when it comes to birth control.

Patient self-guided learning



Location of material

Front desk
Lobby/waiting area
Exam room

Relevant roles

Reception/Phone staff
Medical Assistant (MA)
Triage Nurse
Licensed Practical Nurse (LPN)
Registered Nurse (RN)

Scenarios for use

Front desk staff hands the booklet to the Pt upon check-in for their appointment or directs Pt to counter/table displays with copies.

Staff directs Pt to review the booklet after completion of intake while the Pt waits for provider.

Sample language

"Here are some materials for you to review while you wait for your appointment."

"You can learn more about birth control options in this booklet while you wait for your provider."

"Here is some information to help you identify what is important to you about your method."

DECISION-MAKING WHEEL

Upstream's Decision-Making Wheel helps to **facilitate patient-centered conversations** by enabling patients and their healthcare teams to **quickly compare methods**.

Use the wheel to highlight relevant methods of birth control based on the patient's stated preferences/responses to follow-up questions. After demonstrating how to use it, encourage the patient to hold the wheel in their hand and turn it to **reveal potential benefits and potential side-effects** about each method.

Counseling tool



Location of material

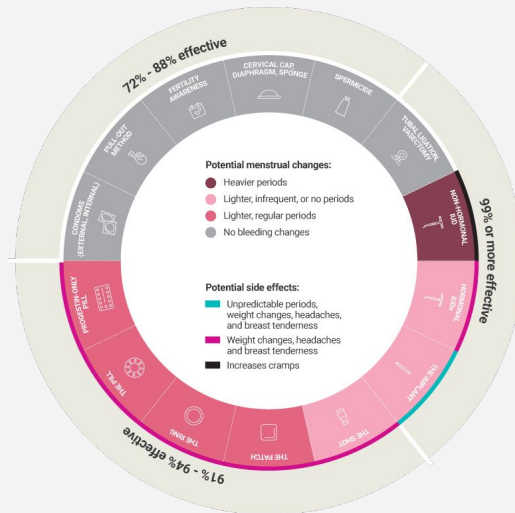
Exam room

Relevant roles

MA
Triage Nurse
LPN
RN
Clinicians

Scenarios for use

Support Staff (SS) asks Pt follow-up questions to identify what is important to Pt about birth control and highlights the relevant methods on the wheel, turning the top layer to reveal more information about each method.

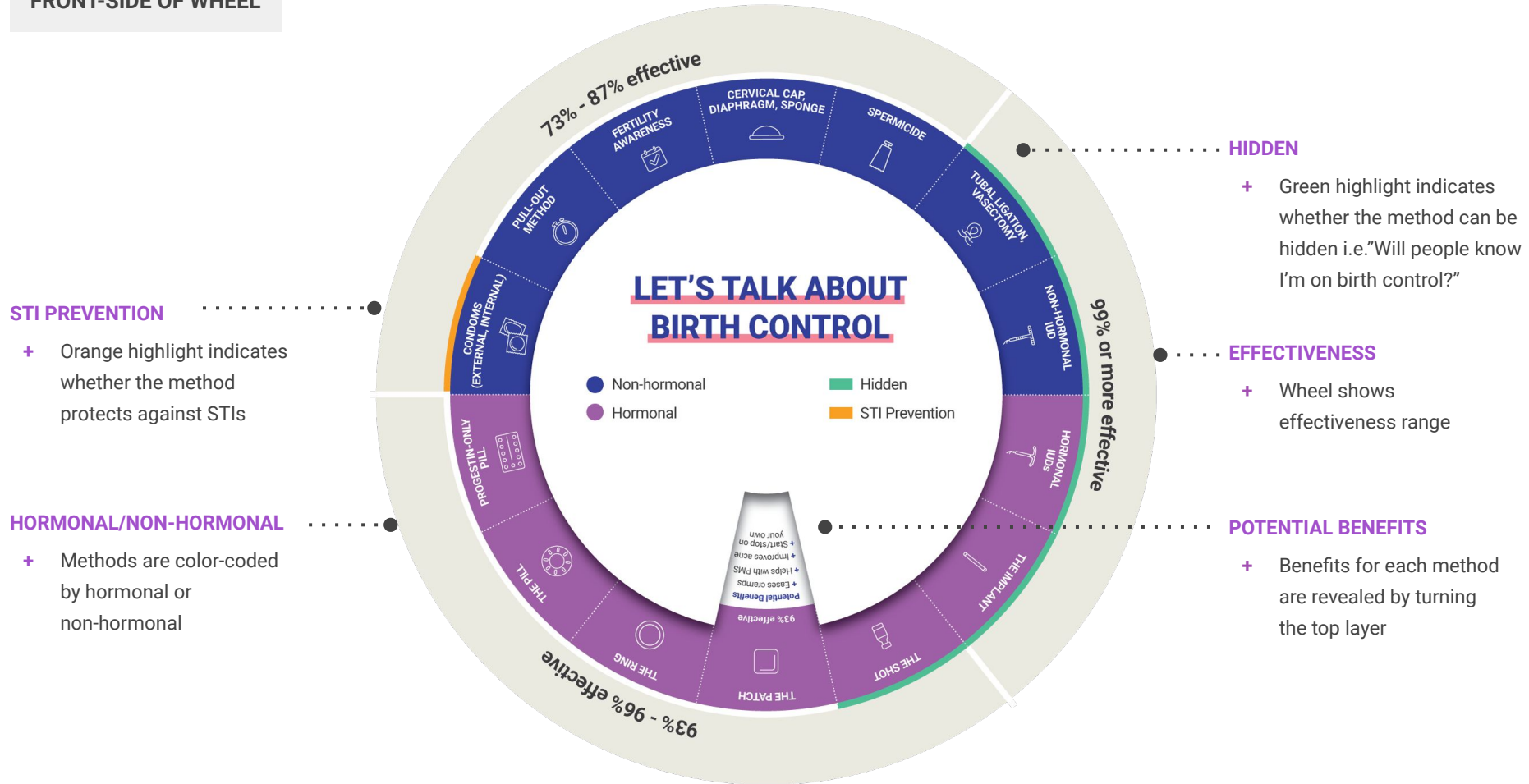


Sample language

"You mentioned wanting a method that is private, take a look at the methods highlighted in green. These methods are "hidden," which means people won't know you are on birth control. Turn the top layer of the wheel to see the potential benefits for each of those methods."

"Flip the wheel over to learn how a method might affect your menstrual cycle and see potential side-effects."

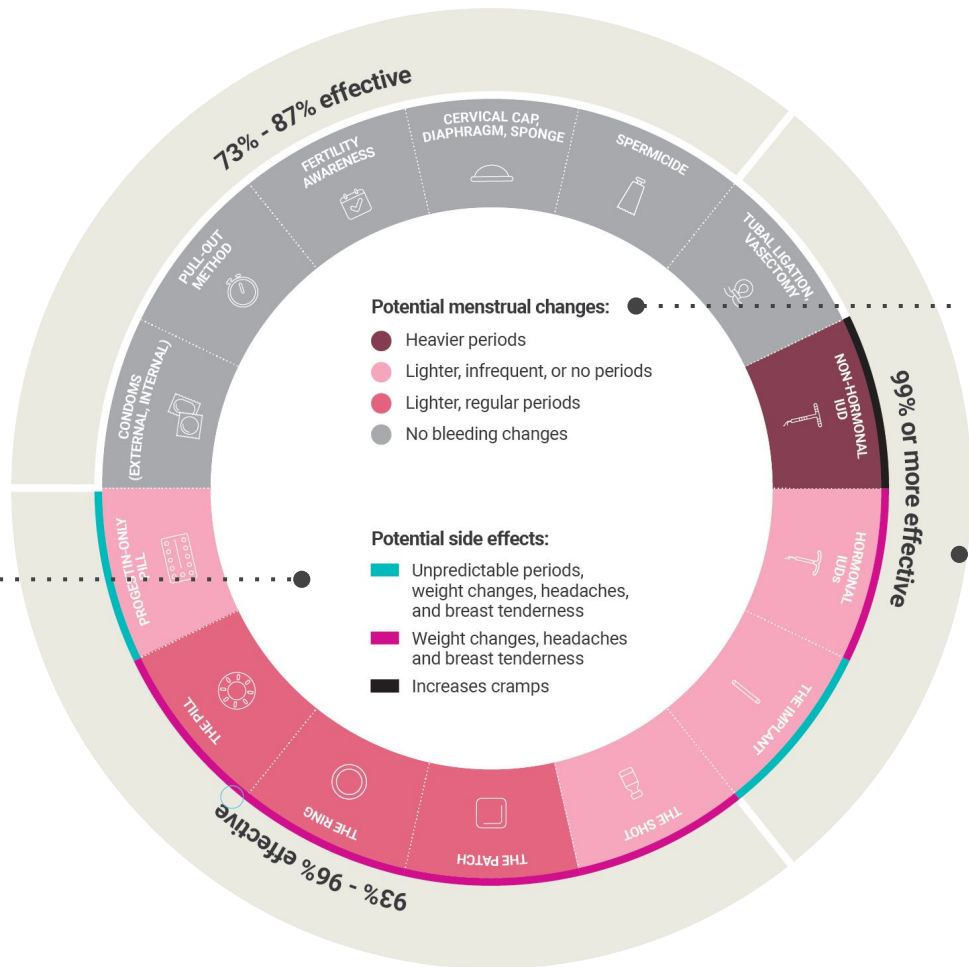
FRONT-SIDE OF WHEEL



REVERSE-SIDE OF WHEEL

POTENTIAL SIDE-EFFECTS

- + Teal, bright pink, and black highlight the potential side-effects associated with each method



POTENTIAL BLEEDING CHANGES

- + Changes to bleeding pattern indicated by color

EFFECTIVENESS

- + Reverse side of wheel also shows % effectiveness

Example follow-up questions

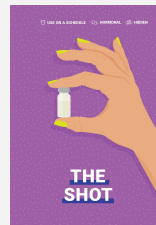
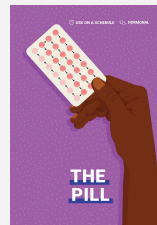
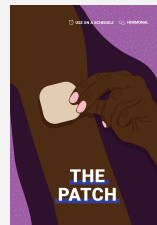
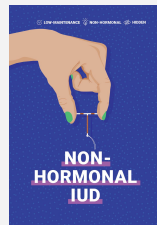
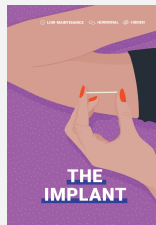
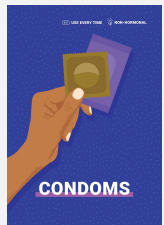
- What are you hoping to get out of your birth control method?
- What is important to you about your method?
- What methods have you used in the past? What did and did not work for you? Any side effects?
- Do you need a hidden method of birth control?
- How would it be for you if you didn't get your period? How would it be if you had irregular periods, unpredictable bleeding, or spotting?
- How would it be for you if your method of birth control had hormones?
- Are there any benefits you are looking for from your method, like helping with PMS or acne?
- Is there anything you are looking to avoid in a method?
- What method(s) interest(s) you the most?

POSTCARDS

Upstream's Birth Control Postcards provide an overview of a method to help patients make decisions about their birth control. They can be used as **self-guided** learning materials while they wait for their appointment to begin, or as a tool to **facilitate conversations** between healthcare teams and patients.

Patient self-guided learning

Counseling tool



Location of material

Exam room

Relevant roles

MA
Triage Nurse
LPN
RN
Clinicians

Scenarios for use

Pt identifies methods they'd like to learn more about through using the Decision-Making Wheel. SS offers the relevant postcards to Pt to review while they wait for the provider.

Pt knows method(s) they would like to discuss. SS or Provider reviews the reverse side of the postcard with Pt to ensure the method(s) align with their goals.

Sample language

"What is important to you about your method?"

"You might like/not like that this method does/is X,Y,Z..."

"Are there any methods you are interested in learning more about?"

"These postcards have more information about the methods you are interested in. Review these and the provider will be in shortly to take care of you and address any more questions."

QUICK SNAPSHOT

- + Tags to help patients easily compare methods



HOW DO I USE IT?

It usually takes 5-10 minutes for a provider to place the Non-hormonal IUD into your uterus. Non-hormonal IUDs are long-lasting. They can work for up to 10 years (12-years, off-label).



HOW EFFECTIVE IS IT?

Non-hormonal IUDs are more than 99% effective at preventing pregnancy.



WHAT I MIGHT LIKE...

- + You can get it removed by a provider at any time
- + You can get pregnant as soon as it's taken out
- + You can use it as emergency contraception, off-label
- + You might like that it's hormone-free



WHAT I MIGHT DISLIKE...

- You might get heavier periods and cramping
- You might feel discomfort during placement and removal
- You won't be protected from STIs



[WANT TO LEARN MORE?](https://www.upstream.org/birthcontrol)

Visit [upstream.org/birthcontrol](https://www.upstream.org/birthcontrol)

SETS EXPECTATIONS

- + Summarizes how the method is used and how it works

EFFECTIVENESS

- + % effective at preventing pregnancy

THINGS TO CONSIDER

- + Calls-out the potential benefits and potential side effects

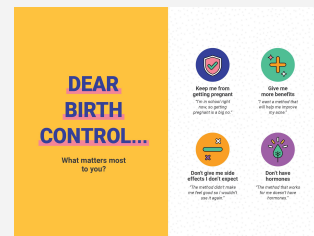
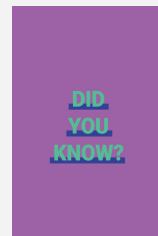
ONE-PAGERS

Upstream's print- and digital-friendly one-pagers encourages at-home learning and exploration. One-pagers can be provided as takeaways after a visit, or sent in advance in telehealth settings. One-pagers are offered in color and black-and-white.

Patient self-guided learning

Counseling tool

Telehealth friendly



Location of material

Takeaway
Telehealth settings

Relevant roles

Reception/Phone staff
MA
Triage Nurse
LPN
RN
Clinicians

Scenarios for use

Phone staff sends relevant one-pagers to Pt ahead of a telehealth appointment.

SS prints one-pager from clinic computer as a takeaway for Pt who wants to learn more/needs more time to review options/wants educational material.

SS/clinician reviews the material with Pt during a video telehealth appointment.

Sample language

"Would you like me to print this postcard so you can take this information with you?"

"Can I send you educational material to review with your provider during your telehealth appointment?"

"This can be a lot of information and there is no pressure to make a decision today, so if you want I can print some of this information for you to review at home..."

PATIENT WEBPAGE

Upstream's patient webpage, upstream.org/birthcontrol, is a digital resource for patients looking to explore and compare their birth control options.

Patient self-guided learning

Counseling tool

Telehealth friendly

WHAT ARE MY BIRTH CONTROL OPTIONS?

The best birth control is the one that works best for you. Select the filter(s) most important to you to find your match.

- ☐ HIDDEN
- ☐ HORMONAL
- ☐ NON-HORMONAL
- ☒ LOW-MAINTENANCE
- ☐ STI PREVENTION

Location of material

Takeaway
Telehealth settings

Relevant roles

Reception/Phone staff
MA
Triage Nurse
LPN
RN
Clinicians

[Explore](#) [Compare](#) ● Hormonal ● Non-Hormonal Sort by A-Z

BREASTFEEDING AS BIRTH CONTROL POTENTIAL SIDE EFFECTS No potential side effects POTENTIAL MENSTRUAL CHANGES No periods 98% EFFECTIVE	CERVICAL CAP, DIAPHRAGM, SPONGE POTENTIAL SIDE EFFECTS Allergic reaction, bladder infection, or irritation 83% EFFECTIVE (Diaphragm) 73-86% EFFECTIVE (Sponge) POTENTIAL MENSTRUAL CHANGES No bleeding changes	CONDOMS (EXTERNAL, INTERNAL) POTENTIAL SIDE EFFECTS Irritation 87% EFFECTIVE (external) 79% EFFECTIVE (internal) POTENTIAL MENSTRUAL CHANGES No bleeding changes	EMERGENCY CONTRACEPTION PILLS POTENTIAL SIDE EFFECTS Nausea, cramping, fatigue, headaches, dizziness 97% EFFECTIVE 99% EFFECTIVE POTENTIAL MENSTRUAL CHANGES Spotting or unpredictable periods
FERTILITY AWARENESS METHODS	HORMONAL IUDS	THE IMPLANT	NON-HORMONAL IUD

Scenarios for use

Phone staff directs Pt to the page in advance of a telehealth appointment.

SS directs Pt to visit page if they would like to learn more/need more time to review options after an in-person appointment.

SS/clinician reviews the page with Pt during a video telehealth appointment.

Sample language

"Here are the printed one-pagers on the two methods you are interested in. There is a link at the bottom to a webpage where you can continue to review the full range of methods any time you want."

"Visit this webpage if you want to explore your birth control options or learn more about a specific method."