Activating Patient Engagement in Care Delivery

Performance Metrics that Guide Patient-Centered Care (Part 1)

PCPCC Support & Alignment Network
Cambridge Health Alliance

March 22, 2017
Housekeeping Items

We encourage you to participate in today’s presentation!

Please type in your questions or comments into the Question pane in the GoToWebinar control panel.
Welcome & Acknowledgements

Mary Minniti, BS, CPHQ
IPFCC Senior Policy and Program Specialist

Amberly Ticotsky, RN, BSN, MPH
Cambridge Health Alliance

Ziva Mann, MA
Patient Lead, Primary Care
Cambridge Health Alliance
Objectives

- Describe three Transforming Clinical Practice (TCPi) performance metrics on patient and family engagement (PFE)
- Share one health care system’s story about their integration of patient and family engagement into operations and their results
- Explore resources available to support PFE practices to implement a robust PFE direct care strategy
Affordable Care Act

**TCPi - Transforming Clinical Practice Initiative**

- Promote broad payment and practice reform in primary care and specialty care.
- Promote care coordination between providers of services and suppliers.
- Establish community-based health teams to support chronic care management.
- Promote improved quality and reduced cost by developing a collaborative of institutions that support practice transformation.
A Strategic Framework

Person & Family Engagement Cycle

- Promote Informed Decision Making
- Share Preferences and Values
- Encourage Engagement & Self Management
- Promote PFE Best Practices
- Co-Create Goals

Improving Healthcare Experiences & Outcomes

QIC Affinity Group

Recent White Paper – Extensive Evidence on PFE

**Harnessing Evidence and Experience to Change Culture:** A Guiding Framework for Patient and Family Engaged Care

Susan B. Frampton, Ph.D., Planetree; Sara Guastello, Planetree; Libby Hoy, PFCCpartners; Mary Naylor, Ph.D., F.A.A.N., R.N., University of Pennsylvania School of Nursing; Sue Sheridan, M.B.A., M.I.M., D.H.L., Patient-Centered Outcomes Research Institute; Michelle Johnston-Fleece, M.P.H., National Academy of Medicine

January 2017

**ABSTRACT** | Patient and family engaged care (PFEC) is care planned, delivered, managed, and continuously improved in partnership with patients and their families (as defined by the patient) in a way that integrates their preferences, values, and desired health outcomes. This vision represents a shift in the role patients and families play in their own care teams, as well as in ongoing quality improvement.
Compelling Evidence

Better culture, care, health and costs:

- Improvement in staff experience, retention, reduction in job stress and burnout
- Improved transitions of care, decrease in unnecessary readmissions
- Increased patient and family success in self-management, improved quality of life, reduced illness burden
- Reduced rates of hospitalization, emergency room utilization, shorter LOS and cost per case

Download for free at NAM.edu/PFEC
PFE is a Primary Driver in TCPI!

- Quality Payment Program
  - Quality Measures (60% of MIPS score)
    - Patient satisfaction
    - Medication management
  - Advancing Care Information (25% of MIPS score)
    - Patient portals, Summary of Care, e-Prescribing, patient-specific health education
  - Improvement Activities (15% of score)
    - Medicaid patient engagement
    - Patient and family engagement in QI
    - TCPI participation

Are You Ready?
PFE PERFORMANCE METRICS

TCPi | Transforming Clinical Practice Initiative
Metric Selection

- Patient Family Engagement Advisory Council launched January 2016
- Created a framework for measuring PFE performance
- Prioritized six metrics to measure across all practices

Diverse membership:
- Patient and family advocates
- PFE experts
- Patient advocacy organizations
- Person/Family/Community Networks
- Healthcare Clinicians
Establishing PFE Baseline & Ongoing Measurement

- **Baseline:**
  - Established in April/May 2017
  - Collected by Practice Transformation Networks directly from each practice

- **Ongoing Measurement:**
  - Beginning in June 2017 on 6 month cycle
  - PFE Metric Questions embedded in the PAT
Person and Family Engagement

Point of Care
- E-tool Use
- Shared Decision Making

Policy and Procedure
- Patient Activation
- Health Literacy Survey
- Medication Management

Governance
- Support for Patient and Family Voices
Shared Decision-Making & Self-Management

- Goal Setting
- Decision Aids
- Develop Care Plans
- Teach Back
- Reassess Goals
Shared Decision-Making

Does the practice support shared decision-making by training and ensuring that clinical teams integrate patient-identified goals, preferences, outcomes, and concerns into the treatment plan (e.g. those based on the individual’s culture, language, spiritual, social determinants, etc.)?

**Intent:** The intent of this metric is to ensure that patients (and their families according to patient preference) are authentically part of the care team.
Effective Engagement at the Clinical Encounter

Studies indicate that more engaged patients achieve higher levels of quality and safer care with fewer errors and safety concern….Patient engagement also improves chronic disease self-management, thus reducing the overall cost burden such as decreasing hospital readmissions, etc.

Patient Activation

Does the practice utilize a tool to assess and measure patient activation?

**Intent:** The intent of this metric is to use a standard method to measure a patient’s activation level. Patient activation reflects “an individual’s overall knowledge, skill, and confidence for self-management”.
Activation

Studies have shown that activation scores are predictive of outcomes within specific patient groups.

Individualizing care based on patient activation results in better outcomes, lower costs, and encourages an individual’s engagement in managing their health and health care.

Health Literacy Survey

Is a health literacy patient survey being used by the practice (e.g., CAHPS Health Literacy Item Set)?

**Intent:** The intent of this metric is to ensure that practices are systematic in addressing health literacy issues.
Communicating Via Decision Aids

Studies have shown that 40-80% of the medical information patients are told during office visits is forgotten immediately, and nearly half of the information retained is incorrect.

A 2011 analysis of 86 randomized clinical trials concluded that decision aids make patients better informed, improve communication with doctors, and increase participation in decisions about their care.

Cambridge Health Alliance

The Story of Partnership
Functional, Patient-Centered Care in the Safety Net....with Care Plans?

Amberly Ticotsky
Ziva Mann
March 22, 2017
Cambridge Health Alliance

- Academic public health safety net system outside of Boston
- 2 hospitals, 12 community centers, 7 cities
- Public Health mandate
  - 180,000+ primary care visits for 120,000 patients
  - Largely public payer mix – 82%, almost all Medicaid
  - >50% of patients speak a language other than English
  - >3,000 employees, 18 labor unions
Union Square Family Health

- Participated in three collaboratives to shape cutting edge PCMH transformation
- Robert Wood Johnson designation of one of the top 30 Primary Care practices in the US
- Featured as a model practice by CMS in the TCPI initiative
- Featured by WSJ for team-based care
- Level 3 PCMH Designation
- Full spectrum Family Medicine Care
- 23,000 patient visits per year, 80 percent with public or no insurance
- 40% Brazilian, 20% Spanish from Latin America, 8% Haitian Creole, sizable Hindi, Gujarati, Punjabi and Nepali populations

THE WALL STREET JOURNAL
THE INFORMED PATIENT
The Doctor's Team Will See You Now
Why Care Plans?

This is how our patient visit fits into their day

- Sleep
- Work/School
- Self Care
- Eating
- Buying things
- Caring for Family
- 15 min Visit
A Care Plan is a documented conversation between a provider and a patient to gain better understanding of what's taking place in the life of a patient. We're already being asked to do too much in a short visit. What if their goal doesn't have anything to do with getting their diabetes under control? I already have a plan for them. I don’t have time for this. I’m responsible. What if this doesn’t work? Patients don’t know how to set goals.
Growing a Care Plan

Diabetes Care Plan

My health goals:
I want to:
1) 
2) 

My important care providers for diabetes:

Tools that I would like to help me with my diabetes:
1) Handouts on: 
2) Picture of plate for healthy eating 
3) Log for tracking sugars 
4) Glucometer 
5) MyChart flow sheet for tracking sugars 
6) Web sites on: 
7) Name of smartphone app: 
8) Pill box 

Barriers:
- Housing problems
- Transportation problems
- Insurance problems
- Need more health knowledge
- Difficult to communicate in English
- Limited access to healthy food
- Worry about safety
- Financial problems
- Hard to access medical care because 
- Not enough personal support from friends and family
- Other family problems or responsibility
- Learning problems
- Legal issues

Steps that I could take now to improve my health:
- Take my medicines every day
- Use stress management techniques
- Keep track of progress using ___ minutes of exercise ___ times per week
- Communicate with my health care team by ___

The next step I want to take to improve my health:
Asking the right questions:
Care Plan Goals

• Understand where patients are in managing their health
• Understand patients’ priorities for their health (what matters to you?)
• Create shared goals
• Develop an action plan **WITH** the patient
• Customize care interventions
• Identify and address strength and challenges
• Build skills needed to reach the goal
• Leverage team-based care model

All teams work from the same care plan, for care coordination, shared goals, and communication between teams. Plan is printed and given to patient.
You’ve Got This!

**Built into the care plan**

- Patient activation (growing knowledge, skills, confidence)
- Tap into patient’s context
- Meet people where they’re at
- Skill building
- SMART plans (specific, measurable, achievable, relevant, time-oriented)

**In your toolbox**

- Motivational Interviewing
- Behavioral Activation
- Relationship building
- Working with vs. to/for
- The extended care team!!
1. My goals to improve my health: ***
2. My healthcare team’s goals: ***
3. My strengths and supports to meet my goals: ***
4. Challenges to meeting my goals: dropdown.
   - Need more support
   - Housing problems
   - Transportation problems
   - Insurance problems
   - Healthcare providers don't speak my language
   - Legal problems
   - Financial problems
   - Other
5. My healthcare team: ***
   - keep my appointments
   - if I feel worse, I will ***
   - take my medicines every day
   - Keep track of progress using ***
   - Other
7. My confidence that I can follow my Action Plan: 1-10
Care Plans: Patient View

Living a Healthy Life with Diabetes
My Goals... My Plan

My Health Goals:

1) 
2) 

Barriers: things could get in the way of me reaching my goals
(for example: money, hard time finding a ride)

My Team: who can help me reach my goals?
(for example: my doctor, family, nutritionist)

<table>
<thead>
<tr>
<th>Name</th>
<th>Relationship</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Tools: which of these things would help me reach my goal?

- Diet Information
- Glucometer
- Pill Box
- Email Your Team
- Diabetes Group

MY ACTION PLAN

I have agreed that to improve my health I will:

1. Choose ONE of the activities below:

   - Work on something that's bothering me.
   - Stay more physically active.
   - Take my medications.
   - Improve my food choices.
   - Reduce my stress.
   - Cut down on smoking.

2. Choose your confidence level:

   - 10 VERY SURE
   - 9 SURE
   - 7 SOMEWHAT SURE
   - 0 NOT SURE AT ALL

3. Fill in the details of your activity

   What:
   How much:
   When:
   How often:
   Where:
   With whom:
   Start Date:
   Follow-Up Date:
   Best Way to Follow-Up:

CHA Cambridge Health Alliance

HARVARD MEDICAL SCHOOL TEACHING HOSPITAL
Care Plans in Action

• I don’t understand how my sugar is not well controlled when I take all my medications.

• Quit smoking, lose weight

• Get off opiates for good

• Could I go back to work, or back to school? apply for disability?

• Strengthen relationship with wife

• I need to sleep at night. I am exhausted.

• Less pain.

• I want to live in a safe situation.
Impact: Staff

“I love the action plan because it helps patients create realistic, actionable steps toward their goals.”

“It allows me to understand where patients are starting from.”

“This is a cornerstone of our conversations with patients about depression, because it provides an opportunity to take concrete steps that can have an impact.”

“When I sit with a patient to do a care plan, I stop and listen.”

“People can focus more on what’s important to them, and in their life.”

“It’s more collaborative: patient and PCP share the work of putting it together, and the patient leads the process.”

“Patients are more engaged.”
Impact: Patients

• “These people are trying to help me, and I should listen to them.”
• “I love Virginia (PCP)!”
• “I felt like I wasn’t just another patient.”
• “Okay, doc, here’s what we’re going to work on next...”
Resources that support implementation of PFE interventions
AHRQ Shared Decision-Making Resources

The SHARE Approach: A Model for Shared Decision Making

The SHARE Approach is a five-step process for shared decision making that includes exploring and comparing the benefits, harms, and risks of each option through meaningful dialogue about what matters most to the patient.

1. Seek your patient’s participation.
2. Help your patient explore & compare treatment options.
3. Assess your patient’s values and preferences.
4. Reach a decision with your patient.
5. Evaluate your patient’s decision.

Shared decision making occurs when a health care provider and a patient work together to make a health care decision that is best for the patient. The optimal decision takes into account evidence-based information about available options, the provider’s knowledge and experience, and the patient’s values and preferences.

Decision Aids - Healthwise

http://www.informedmedicaldecisions.org/shareddecisionmaking.aspx
Patient Activation Measure

Me and My Health

Below are some statements that people sometimes make when they talk about their health. Please indicate how much you agree or disagree with each statement as it applies to you personally by circling your answer. Your answers should be truthful and not just what you think the doctor wants you to say.

If the statement does not apply to you, circle N/A.

1. When all is said and done, I am the person who is responsible for taking care of my health. Disagree Strongly Disagree Agree Agree N/A

2. Taking an active role in my own health care is the most important thing I can do for my health. Disagree Strongly Disagree Agree Agree N/A

3. I am confident I can help prevent or reduce problems associated with my health. Disagree Strongly Disagree Agree Agree N/A

4. I know what each of my prescribed medications is for. Disagree Strongly Disagree Agree Agree N/A

5. I know what I need to do to control my chronic illness. Disagree Strongly Disagree Agree Agree N/A

6. I know that if I am feeling ill, I can get help right away. Disagree Strongly Disagree Agree Agree N/A

7. I am confident that I can follow through on medical treatments I may need to do at home. Disagree Strongly Disagree Agree Agree N/A

8. I understand my health problems and how they cause me suffering. Disagree Strongly Disagree Agree Agree N/A

9. I know what treatments are available for my health. Disagree Strongly Disagree Agree Agree N/A

10. I have been able to maintain or improve my physical fitness, eating right and exercising. Disagree Strongly Disagree Agree Agree N/A

11. I know how to prevent problems with my health. Disagree Strongly Disagree Agree Agree N/A

12. I know how to figure out solutions when new problems arise with my health. Disagree Strongly Disagree Agree Agree N/A

13. I am confident that I can maintain my health changes, eating right and exercising, even during times of stress. Disagree Strongly Disagree Agree Agree N/A

Over the past two weeks, how often have you been bothered by any of the following problems?

Little interest or pleasure in doing things
Feeling down, depressed or hopeless

Not at all Several Days More than half the days Nearly every day

0 1 2 3

PeaceHealth’s Team Fillingame Uses Patient Activation Measure to Customize the Medical Home

by Laurel Sheehy, Kathleen Dowler, and Susan Champion, Center for the Health Professions
May 2011, Revised December 2011

ABSTRACT

PeaceHealth Medical Group received a grant to pilot a patient-centered medical home in one of its practices in Eugene, Oregon. “Team Fillingame” trained staff nurses and added a part-time medical health worker to address patients’ social, behavioral and mental needs. Using a patient activation measure (PAM), the team tailors and coordinates patient care to fit patients’ level of activation and activity. Once-trained medical office assistants play a key role in providing health coaching, patient-based supervised phone triage, and pre-visit planning.

Dr. Fillingame was ready to close his doors. After seeing many years as a family practitioner with PeaceHealth Medical Group in Eugene, Oregon, he was frustrated with the pace and volume of work in the fee-for-service environment. As his panel expanded, he was increasingly faced with patients who had chronic conditions and problems, all of them demanding more time for visits. He felt “I could not provide the quality of care my patients needed.”

He remembers thinking, “I had a dead-end job as far as I could without providing very many services.”

He thought about starting a concierge-style practice where he could provide quality care at slower pace to a smaller panel of patients who were willing to pay an annual retainer membership fee for his services. However, this model conflicted with PeaceHealth’s mission, which includes the “elimination of health care resources” for everyone.

So, when an opportunity arose to pilot a team-based model of primary care, Dr. Fillingame was very interested. He was recruited to form “Team Fillingame” to test a patient-centered medical home model that intersected behavioral health, patient activation, health coaching, and extended self-management support into the delivery of care. The initiative engaged registered nurses and medical assistants to deliver some of the PAM interventions identified by the physician to other qualified staff members. The model includes medical assistants

Practice Profile

Name: PeaceHealth, part of PeaceHealth Medical Group's St. Mary’s Clinic
Type: Non-profit, 31 physician-based medical homes
Organization: Network, primary care
Location: Eugene, OR

Staffing

- 1 physician (79 FTE in patient care)
- 1 nurse practitioner (65 FTE)
- 1 RN care manager
- 1 care facilitator
- 1 wellness coordinator (35 FTE)
- 3 health coaches (currently 2 MAs & 1 LPN)

Supported by some clinics with staff such as clinic managers

Number of Patients: 1,500 in last 16 months

Patient Demographics: The patient panel is primarily women and their adult children as well as seniors in chronics and infants. Payment mix includes approximately 40% commercial insurance, 31% Medicare, and 5% for patients. Demographics reflect the surrounding area, which is primarily Caucasian with a high rate of unemployment.

https://healthforce.ucsf.edu/sites/healthforce.ucsf.edu/files/publication-pdf/10.1%202011_05_PeaceHealth%27s_Team%20Fillingame_Uses_Patient_Activation_Measures_to_Customize_the_Medical_Home.pdf

Free access to the PAM may be available through your local QIN/QIO.
Patient Activation – Motivational Interviewing

Motivational interviewing (MI) can be used as a therapeutic counseling modality for patients with substance use and other disorders. Clinicians can also use the principles of MI more informally in all of their interactions with patients. Common clinical challenges in which MI can be applied include smoking cessation, weight loss, condom use, and adhering to a specific diet, medication regimen, or treatment plan. This section of the module introduces the stages of change upon which MI is built, the core principles of MI, and MI tools.

Stages of Change

MI grew out of the transtheoretical model of change, which recognizes a series of five stages that individuals typically pass through as they make a significant behavior change. \[1, 2\] The list below defines the levels and describes the therapeutic goals for each.

1. **Precontemplation**—Individuals in precontemplation often don't recognize the health impact of a behavior and are not seriously contemplating a change. The goal of working with patients in precontemplation is to help them link their behavior to the adverse health risks or consequences they are experiencing.

2. **Contemplation**—Individuals in contemplation are balancing the pros and cons of maintaining a behavior versus changing it. The goal of working with patients in contemplation is to help them weigh the benefits of a healthy behavior change against the benefits of maintaining the status quo.

https://practiceadvisor.org/Modules/improving-clinical-care/motivational-interviewing
Patient Activation - Confidence

**IMPORTANCE**
On a scale of 0 to 10, with 10 being very important, how important is it for you to change (INSERT BEHAVIOR)?

<p>| | | | | | | | | | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>0</td>
<td>1</td>
<td>2</td>
<td>3</td>
<td>4</td>
<td>5</td>
<td>6</td>
<td>7</td>
<td>8</td>
<td>9</td>
</tr>
<tr>
<td>Not at all</td>
<td>Somewhat</td>
<td>Very</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**CONFIDENCE**
On a scale of 0 to 10, with 10 being very confident, assuming you wanted to change (INSERT BEHAVIOR), how confident are you that you can do it?

<p>| | | | | | | | | | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>0</td>
<td>1</td>
<td>2</td>
<td>3</td>
<td>4</td>
<td>5</td>
<td>6</td>
<td>7</td>
<td>8</td>
<td>9</td>
</tr>
<tr>
<td>Not at all</td>
<td>Somewhat</td>
<td>Very</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**PROBE 1: COULD HAVE BEEN LOWER**
**PROBE 2: COULD HAVE BEEN HIGHER**
AHRQ Health Literacy Tools

Quick Start Guide

1. Watch a short video.
   This 6-minute health literacy video was sponsored by the American College of Physicians Foundation and has some vivid examples of why addressing health literacy is so important.

2. Pick a tool and try it.
   Link to one of these tools and review it. Pick a day and try it out on a few patients.
   - I want to be confident my patients are taking their medicines correctly. (Conduct Brown Bag Medicine Reviews)
   - I want to be confident that I am speaking clearly to my patients. (Communicate Clearly)
   - I want to be confident that my patients understand what they need to do regarding their health when they get home. (Use the Teach-Back Method)

3. Assess your results.
   How did it go? Do you need to make some adjustments? Do you want to address another statement from the list above and try another tool? Or, you may want to be more systematic and implement “Tools to Start on the Path to Improvement,” Tools 1, 2, and 3.

http://nchealthliteracy.org/teachingaids.html
Additional Health Literacy Resources

http://nchealthliteracy.org/teachingaids.html
CAPHS Health Literacy Survey - Clinics

- HL9: Provider gave all the health information patient wanted
- HL10: Provider encouraged patient to discuss health questions or concerns
- HL14: Provider asked patient to describe how patient was going to follow instructions
- HL18: Blood test, x-ray, or other test results were easy to understand
- HL21: Provider gave easy to understand instructions about taking medicines

- Created October 1, 2015
- 31 supplemental questions
- The items address the following five topic areas:
  - Communication with provider
  - Disease self-management
  - Communication about medicines
  - Communication about test results
  - Communication about forms

https://www.ahrq.gov/cahps/surveys-guidance/cg/instructions/downloadsurvey3.0.html
Additional Resources
Institute for Patient and Family Centered Care

Resources

Discussion Forums

http://www.ipfccc.org/
Join at: pfacnetwork.ipfccc.org
PCPCC SAN: Improving Care Through Partnership with Patients, Families and Communities

Welcome to the Patient Centered Primary Care Collaborative's Support and Alignment Network (SAN). We are part of the Transforming Clinical Practice Initiative, a nationwide program to help clinicians transform the way they practice to improve outcomes, reduce costs, and improve health care quality. Our SAN offers training, technical assistance and coaching to help TCPI clinicians engage individuals, families and communities to improve care.

Why engage patients and families?
Every person has a different perspective on their own health care, influenced by culture, family situation, age, language and a lot of other factors. To be effective, health care has to address the needs of the person, not just some hypothetical ‘patient.’ Patient- or person-centered care means offering health care services to individuals based on their needs, preferences, and circumstances. Person-centered care makes a difference: it makes patients and families feel more welcome, encourages them to participate in their own health as partners, and improves the patient’s experience of care.

Why should clinicians care?
The Transforming Clinical Practice Initiative is a nationwide program to help clinicians transform the way they practice to improve outcomes, reduce costs, and improve health care quality. Patient and family engagement is a critical strategy needed to achieve these goals. The TCPI is recruiting 140,000 clinicians to participate in practice transformation, and is encouraging each and every one to involve patients and families in a meaningful way.

Transformation is possible!
Patients may not know what to do to be involved in improving health care. Clinicians might not know what steps to take to get started or to improve even further. This website offers tools, training and information to support patients, families, and clinicians in making the transformation to person-centered care. Use our resources to learn more about getting started, join our Patient-Family Advisory Council Network (the PFAC Network) to ask questions from your peers, or use our map to identify practices in your area.

For Patients
Learn more about ways to be a partner in improving health care

For Clinicians and PTNs
Learn why patient and family engagement matters, and strategies to improve PFE measures

SAN Resource Library
Practical information and tools to involve patients and families in improving health care quality
Questions?
Contact Us!

- Liza Greenberg, Program Director
  liza@pcpcc.net

- Jacinta Smith, Program Manager
  jacinta@pcpcc.net

https://www.pcpcc.org/tcpi