

**CREATING A PATIENT
ENGAGEMENT TOOLKIT**

**JANUARY 18, 2017
12:00 - 1:00 PM**

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AGENDA

- Project overview
- Qualitative data collection and analysis
- Modified Delphi calls
- Patient engagement toolkit
- Next steps
- Anticipated barriers



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POLL QUESTION #1

- **What is your primary role in the VA?**
 - Student, trainee, or fellow
 - Clinician
 - Researcher
 - Administrator, manager or policy-maker
 - Other

POLL QUESTION #2

- How familiar are you with CEPACT and the demonstration labs?
 - I am completely familiar with it
 - I am somewhat familiar with it
 - I am not sure
 - I am somewhat unfamiliar with it
 - I am completely unfamiliar with it

CEPACT GOALS

- **Goals:**
 - To make primary care more patient-centered
 - To create partnerships between Veterans and their team
 - Improve performance on patient satisfaction measures
 - PACT Implementation Index (PI²) → Modified PI²
 1. Comprehensiveness
 2. Patient centered care and communication
 3. Shared decision making
 4. Self-management support



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CEPACT OBJECTIVES

- **Objectives:**
 - Identify the best practices to improve patient engagement
 - Disseminate these best practices in VISN 4 and nationally
 - Improve Veteran engagement in care and reduce disparities in patient engagement

The focus of our project is Patient Engagement



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PATIENT ENGAGEMENT DEFINITION

Any practices, policies, or procedures that

(a) involve and support patients (and their families and representatives) as active members of the health care team

(b) encourage collaborative partnerships between patients, health care providers, and the organization as a whole

Adapted from Maurer et al. 2012 (AHRQ Environmental Scan Report)



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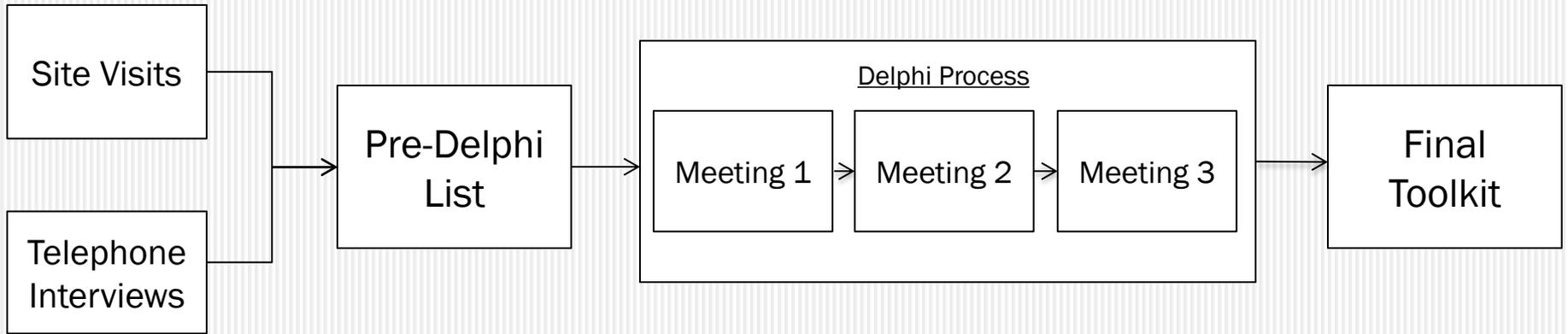
PROJECT STEPS

- Conducted interviews about patient engagement with a sample of providers (completed)
- Developed a prioritized list of best practices via consensus building conference calls (completed)
- Disseminate these best practices throughout VISN 4 and track implementation (in progress)



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QUALITATIVE INTERVIEWS

- **Asked staff to describe patient engagement efforts and any barriers/facilitators to engaging patients**
 - 66 in-depth qualitative telephone interviews
 - 6 site visits
- **Created two lists**
 - 128 patient engagement practices
 - 94 patient engagement resources



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WHAT ARE PATIENT ENGAGEMENT PRACTICES & RESOURCES?

- **Patient engagement practices** are things staff members do to directly involve and empower the veteran in their own care.
- **Patient engagement resources** are facilitators that help to improve and support patient engagement efforts at a facility.



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QUALITATIVE ANALYSIS

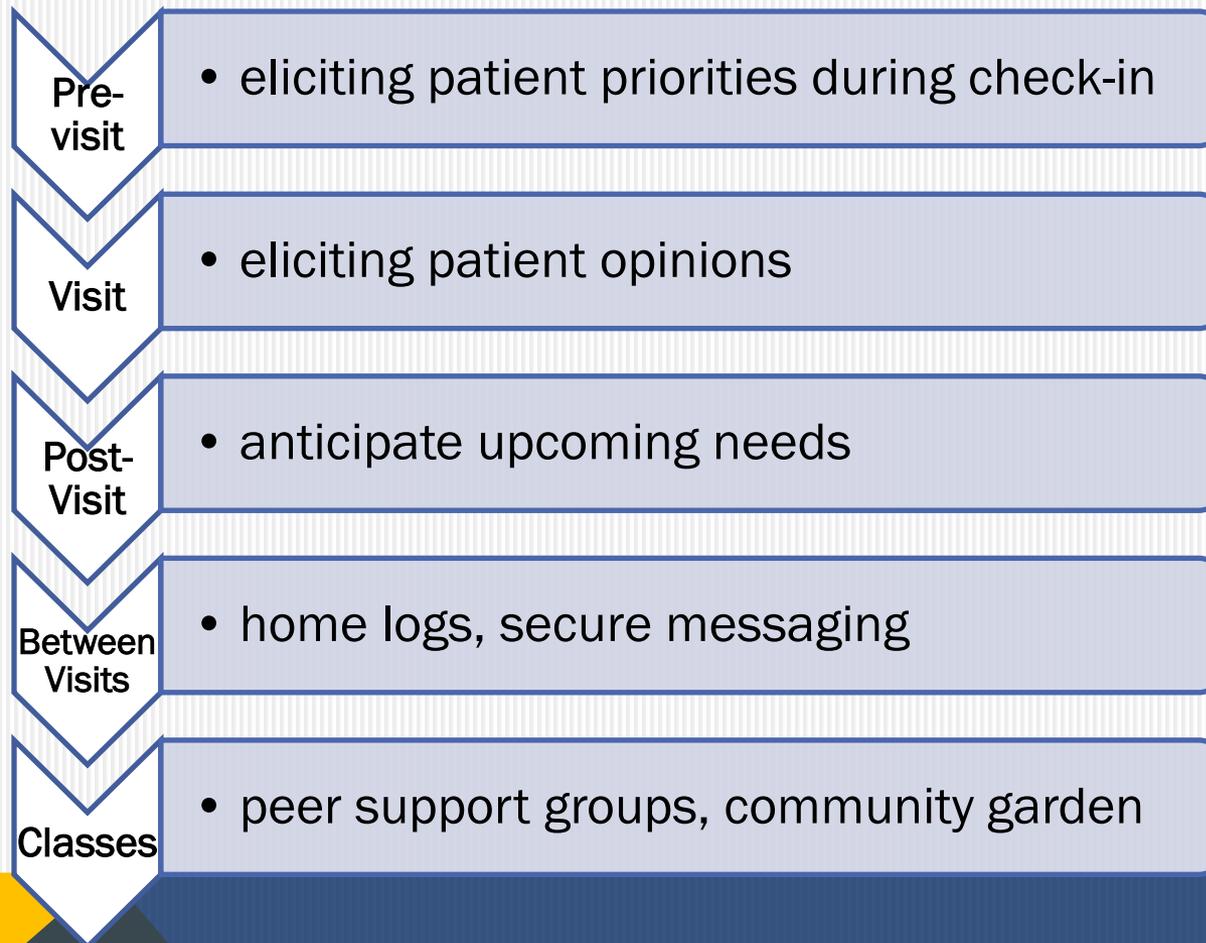
- NVivo 10 was used for analysis
- Coding was conducted by five qualitative researchers
- Data was organized into 14 broad themes and multiple sub-codes
- Patient engagement practices were defined as actionable efforts being made by staff for their patients
- Patient engagement resources were defined as actionable efforts being made at the facility level



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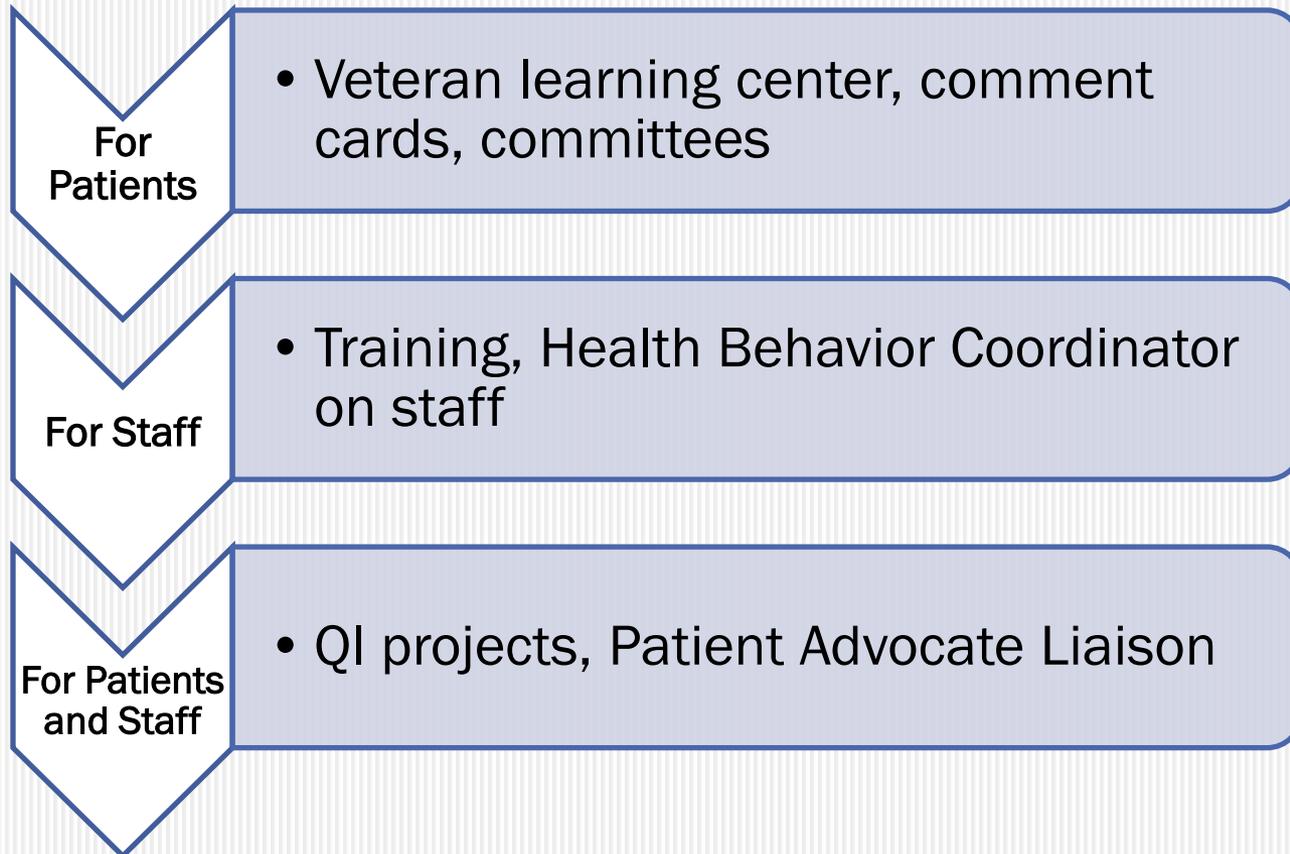
EXAMPLES OF PATIENT ENGAGEMENT PRACTICES



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EXAMPLES OF PATIENT ENGAGEMENT RESOURCES



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MODIFIED DELPHI CALLS

- Started with 222 practices and resources
- 12 participants
 - 2 Veterans
 - 10 VA health care professionals
- Goal was to shorten and prioritize the lists by determining which practices and resources were the most important and most feasible in advancing patient engagement
- 3 sessions where participants rated items and held discussions



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WEEK 1

- **Participants first completed two surveys on:**
 - Importance
 - Likert scale asking “On the whole, how important is this practice to help patients be more engaged in their health care?”
 - And Feasibility
 - Likert scale asking “How easy or convenient is the practice to implement?” & “Is the practice difficult or nearly impossible to implement?”



KEPT
74 items



REMOVED
32 items



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Pre-visit

Have clerks ask patients about the primary goal of their visit.

Extremely

Very

Moderately

Slightly

Not at all

How important is this practice for patient engagement?

Pre-visit

Have clerks ask patients about the primary goal of their visit.

Extremely

Very

Moderately

Slightly

Not at all

How feasible would it be to implement this practice?

WEEK 2

- Participants completed two additional surveys:
 - Items polarized on importance and feasibility were re-visited
 - Medium rated items were re-rated as either “keep” or “remove”



KEPT
57 items



REMOVED
59 items



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Pre-visit

Polarized items were re-rated on importance & feasibility

Have clerks provide patients with a check-in sheet that explicitly asks them to provide the reason for their visit and asks them to think about questions they have for their provider.

How important is this practice for patient engagement?

Extremely

Very

Moderately

Slightly

Not at all



Pre-visit

Provide patients with a summary of information from their most recent visits so that they can review the information, such as test results, and ask pertinent questions of their PACT.

Keep

Remove

WEEK 3

- Participants completed a final survey where they chose their top preferences from the remaining list of practices and resources
- CEPACT staff reviewed the remaining items and generated the final practices & resources lists



KEPT
55 items



REMOVED
76 items



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Practices: Group 1

Please choose your top 3 practices

Ask the patient if you have met all of their needs during the visit or if they have any remaining questions or expectations.

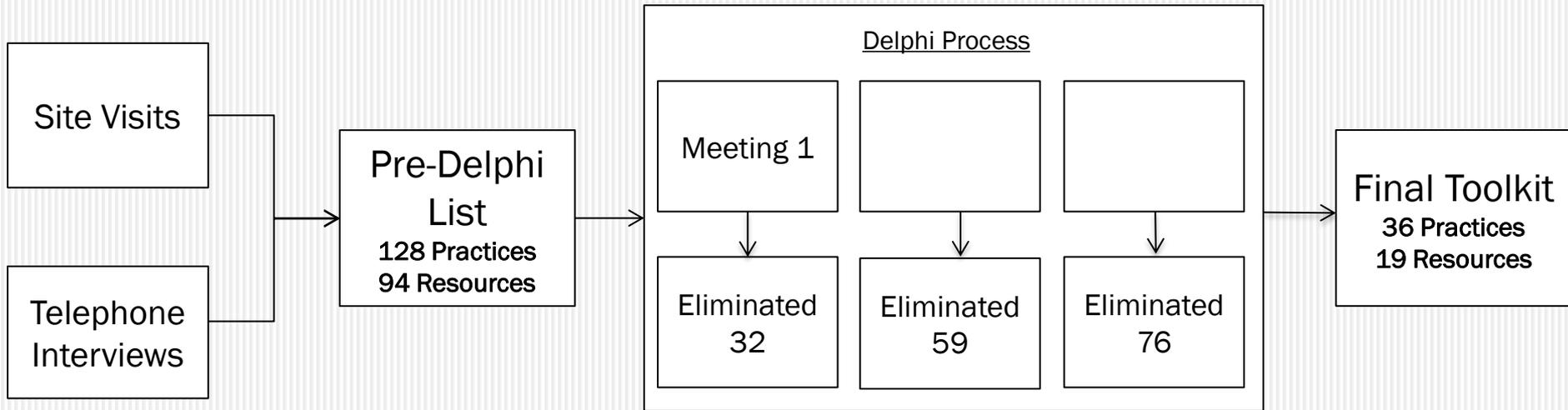
Set up a computer somewhere in primary care that can be used by patients to sign up for MyHealthVet.

Ask patients to explain their priorities or goal for the visit or ask follow-up questions if another PACT member has already asked them and provided that information to you.

Establish a group clinic or classes for patients with high cholesterol that includes peer discussion/education, patient education, and multidisciplinary presentations and representation.

Establish a "Wellness" group intended to help patients discuss and set health goals and provide support for them to meet their goals.

RESULTS



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FINAL PRACTICE LIST

- The final practice list reflected both when the practice occurred and their associated PI² domains

When the practice occurs	# of Practices
Pre-Visit	3
Visit	17
Post-Visit	2
Between Visits	8
Classes & Clinics	6
Total	36

PI ² Domain*	# of Practices
Comprehensiveness	6
Patient-centered care and communication	20
Shared decision making	7
Self-management support	22

*PI² domain categorization is not mutually exclusive



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FINAL PATIENT ENGAGEMENT PRACTICES EXAMPLES

Pre-visit

- Activate patients for visit; Prepare providers for visit

Visit

- Build rapport with patients; Elicit visit priorities; Give patients agency; Gather information from patients and understand health contexts; Set goals; Educate patients

Post-visit

- Summarize visit and next steps

Between visits

- Follow-up with extended PACT members; Follow-up with calls to patient; Promote use of MyHealtheVet/Secure messaging; Provide patient support materials

Classes & Clinics

- Use classes and clinics to support patient engagement



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FINAL RESOURCE LIST

- The final resource list is organized by categorical themes

Categorical Theme	# of Resources
Encourage a supportive environment for patient engagement	9
Patient engagement training	5
Resources for communication	2
Quality improvement & feedback to improve patient engagement	3
Total	19



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FINAL PATIENT ENGAGEMENT RESOURCES EXAMPLES

Environment

- Improve phone access, create protected time, encourage teamwork, support staff

Training

- Require and support trainings and refresher trainings on communication, MI, patient centered care, and PACT

Communication

- Create customized programming on TVs and electronic bulletin boards, Create program guides for patient and staff

Feedback

- Audio or video record clinical encounters, Establish primary care advisory committees, Appoint patient advocate liaisons to manage concerns



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DISSEMINATION EFFORTS TO DATE

- Practices & resources were packaged into an online toolkit
 - www.visn4.va.gov/VISN4/CEPACT/PE_practices/PE_tools.asp
- Flyers were created for VISN 4 providers
 - Includes information on how to access toolkit to improve patient engagement at their facility
- Meetings
 - Participated in two VISN4 Primary Care Committee calls and one site call to discuss buy-in and strategies for implementing practices



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WHAT'S NEXT?

- **Goals for next phase of project:**
 - Continue with dissemination of practices to VISN4
 - Recurring meetings to support implementation
 - Tracking progress of implementation over the next 2 years
 - Quantitative evaluation of the effect of dissemination and spread of best practices
 - Assemble a prototype toolkit to disseminate nationally



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CEPACT FLYER ON HOW TO ACCESS WEBSITE



What is Patient Engagement?

Patient Engagement includes any practices, policies, or procedures that:

- involve and support patients (and their families and representatives) as active members of the health care team
- encourage collaborative partnerships between patients, health care providers, and the organization as a whole

Patient engagement is a core tenet of the PACT model. Taking steps to improve patient engagement is part of VISN 4 goals to implement best practices and improve patient satisfaction.

Tools to Increase Patient Engagement

CEPACT would like to help you achieve the PACT mission by supporting patient engagement efforts in VISN 4.

With input from VA staff at facilities nationwide, and a panel of VA staff and Veterans in VISN 4, we identified feasible practices and resources being used to increase patient engagement.

We packaged these practices and resources into an online toolkit. You can access the toolkit, which also includes descriptions, real examples, and quotes from staff, here:

 www.visn4.va.gov/VISN4/CEPACT/PE_practices/PE_tools.asp

What can you do to increase patient engagement locally, in VISN 4, and nationwide?

ANTICIPATED BARRIERS

- **Buy-in**
 - Lack of understanding of importance of patient engagement. There is a current push for access.
 - Working with key contacts to help with buy-in
 - Participated in two primary care leadership calls
 - Held a call with one site to brainstorm on strategies
- **Time commitment**
 - Personnel busy and may not be able to commit to ongoing check-ins and required efforts with implementation
 - Conflicting priorities



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COMPONENTS STILL IN DEVELOPMENT

- Establishing buy-in
- Identifying POCs
- Determining criteria for tracking progress
- Expectations at monthly check-in meetings
- Developing survey & tracking tools



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PATIENT ENGAGEMENT RESOURCES

Barello, Serena, et al. "The challenges of conceptualizing patient engagement in healthcare: a lexicographic literature review." *Journal of Participatory Medicine* 6 (2014): e9.

Carman, Kristin L., et al. "Patient and family engagement: a framework for understanding the elements and developing interventions and policies." *Health Affairs* 32.2 (2013): 223-231.

Coulter, Angela. "Patient engagement—what works?." *The Journal of ambulatory care management* 35.2 (2012): 80-89.

Say, Rebecca E., and Richard Thomson. "The importance of patient preferences in treatment decisions—challenges for doctors." *Bmj* 327.7414 (2003): 542-545.

<https://www.ahrq.gov/sites/default/files/publications/files/ptfamilyscan.pdf>

<http://www.athenahealth.com/whitepapers/patient-engagement-strategies>

QUESTIONS/COMMENTS

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