CPC
Comprehensive Primary Care

Case Studies in Self-Management Support

June 10, 2014

Moderator

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Introductory Comments

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Case Studies in Self-Management Support

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Two Views of SMS

- Portfolio of **tools and techniques** to help patients change behavior

- A fundamental transformation of the patient caregiver relationship into a **collaborative partnership**.

Tom Bodenheimer, MD, UCSF

Self-Management Support vs Shared Decision Making

- SMS – Any patient with a chronic condition or risk factor
- SMS – Changing health behaviors, building confidence
- SMS – Goal setting and action planning about behavioral goals
- SDM – Preference-sensitive conditions
- SDM – Specific treatment decisions, understand options
- SDM – Condition-specific tools, often videos about a specific procedure or condition

- **Patient Education**
  - Information and skills are taught
  - Usually disease-specific
  - Assumes that knowledge creates behavior change
  - Goal is compliance
  - Teachers are health care professionals
  - Didactic

- **Self-Management**
  - Skills to solve patient-identified problems are taught
  - Skills are generalizable to all chronic conditions
  - Assumes that confidence yields better outcomes
  - Goal is to increase self-efficacy
  - Teachers can be professionals or peers
  - Interactive

from Bodenheimer, Lorig, et al JAMA 2002;288:2469.

Collaborative Care: Cycle of Self-Management Support

Before the Visit

Gather Clinical Data
- labs
- screenings
- specialist reports

Gather Patient Experiences
- symptom monitoring
- medication taking
- stressors

During the Visit

Front Office
- build relationships
- explore needs and preferences

Provider Exam
- set agenda
- review clinical and patient experience information
- collaborate to set SM goals in care plan

Nurse/MA Coaching & Support
- create action plan
- assess barriers
- support change
- patient education & skill building

After the Visit

Follow Up
- revise action plan
- problem solve

Specialist Referrals
- coordinate care referrals

Community Linkages
- patient education programs
- fitness and nutrition
- Web-based resources and social networking

Peer Programs
- voluntary health organizations
- web-based chat rooms
- lay-led groups

Improved Outcomes

- Increased Healthy Behaviors
- Improved Clinical Outcomes
- Increased Collaboration between Patient and Provider
- Improved Physician Satisfaction and Retention

"The purpose of self management support is to aid and inspire patients to become informed about their conditions and take an active role in their treatment." —Bodenheimer 2005

For more information, tools and links, go to:
www.NewHealthPartnerships.org

Dr. Beran

Westchester Health Associates

Jane Bilello, Nurse Case Manager

Lagrangeville Primary Care
& Millbrook Primary Care
New York

Leslie Ferguson, NP

Summit Medical Clinic

Milestones of SMS Implementation

- How are you assuring that goals are patient driven?
- How are you implementing action plans?
- How are providers actively engaged in SMS? Others on team?
- What tools have you developed or adopted that prompt and support SMS with all patients who need them?
- What ongoing training is provided for staff in SMS/coaching?
- How are you documenting SMS goals for ongoing follow-up?
- How do you assure patients know what to do when they go home?
- Do you have peer support groups or mentors?

QUESTIONS?