Quality Improvement Instrument Improves Multidisciplinary Approach to Self Management in West Virginia Clinics

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2010 CDC DIABETES TRANSLATION CONFERENCE

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What is PCRS?

Assessment of Primary Care Resources and Supports for Chronic Disease Self Management

- A “drill down” of Self Management Supports in the Chronic Care Model that defines its components
- A self assessment tool for patient care teams in primary care settings
- A quality improvement tool
Who should use it?

- Multidisciplinary patient care teams in primary care settings who are incorporating self management support into chronic illness care

- Teams interested in improving the quality of their self management support systems and service delivery
To help patient care teams in primary care settings focus on actions that can be taken to support self management by patients with diabetes and other chronic conditions

Specifically, the PCRS helps:

- Define/ describe optimal performance
- Identify gaps in resources, services and supports for self management
- Facilitate communication among team members; build consensus for change
- Provide a mechanism to monitor progress
The components of PCRS

- **Patient Support**
  - Assessment at the “micro system” level (patient, provider, care team)
  - Addresses characteristics of service delivery found to enhance patient self management

- **Organizational Support**
  - Assessment at the “macro system” level (clinic or health care system)
  - Addresses characteristics of organizations that support the delivery of self management services
Patient Support

1. Individualized assessment of patient self management educational needs
2. Self management education
3. Goal setting/ action planning
4. Problem solving
5. Emotional health
6. Patient involvement in decision making
7. Social support
8. Links to community resources
Organizational Support

1. Continuity of care
2. Coordination of referrals
3. Ongoing quality improvement
4. System for documentation of SM support services
5. Consumer participation/patient input
6. Integration of SM support into primary care
7. Patient care team/team approach
8. Staff education and training
### I: PATIENT SUPPORT  (circle one NUMBER for each characteristic)

<table>
<thead>
<tr>
<th>Characteristic</th>
<th>Quality Levels</th>
<th>A (=all of B plus these)</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>D</td>
<td>C</td>
</tr>
<tr>
<td>3. Goal Setting</td>
<td>...is not done</td>
<td>...occurs but goals are established primarily by member(s) of the health care team rather than developed collaboratively with patients</td>
</tr>
<tr>
<td></td>
<td>1</td>
<td>2</td>
</tr>
<tr>
<td>4. Problem-Solving Skills</td>
<td>...are not taught or practiced with patients</td>
<td>...are taught and practiced sporadically or used by only a few team members</td>
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<tr>
<td></td>
<td>1</td>
<td>2</td>
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<tr>
<td>5. Emotional Health</td>
<td>...is not assessed</td>
<td>...is not routinely assessed; screening and treatment protocols are not standardized or are nonexistent</td>
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<td>2</td>
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</table>
Scoring the tool

Letters A-D
- A = (highest level) characteristic is part of a quality improvement **system** that gives feedback to the patient and the health care system
- B = characteristic is consistently well demonstrated in **teams** and services are coordinated
- C = characteristic is demonstrated **inconsistently** or sporadically during patient-provider interaction
- D = characteristic **not** demonstrated

Numbers
- Within a level, the degree to which a characteristic is being addressed
How the PCRS is being used to plan and document Self Management QI in WV Primary Care Centers
Licensed to disseminate CDSMP in 2003

- 19 leader trainings in WV
- 267 people trained as workshop leaders
- More than 130 6-week CDSMP workshops conducted in WV
- Over 1,032 people participated – learning and practicing self management skills
Primary Care Center Partners

- Offer PCRS as tool to define standards for self management integration
- Clinics’ experience and reasons for using PCRS varies
- Used to document where they are and what they need
- A tool for planning self management QI
Clinic Example

- Success with offering CDSMP
- Success with incorporating self management into Medical Group Visits
- Senior management interest in making system change for Self Management Integration
- Standardize user friendly process for self management goal setting
- Need to establish self management baseline for Rural Quality Grant and Medical Home Application
Self Management QI Team

- Looking for ways to plan and document self management system of care change
- PCRS piloted at 2 of the 4 clinic sites
- Raise awareness, and document baseline and plan next steps
- Decision to invite all care teams to fill out assessment on line

http://improveselfmanagement.org
<table>
<thead>
<tr>
<th>Category</th>
<th>PCRS Characteristic</th>
<th>Number of Respondents</th>
<th>High Score</th>
<th>Low Score</th>
<th>Mean</th>
<th>Standard Deviation</th>
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</thead>
<tbody>
<tr>
<td><strong>Patient Support</strong></td>
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<tr>
<td>Individualized Assessment</td>
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<td>13</td>
<td>10</td>
<td>2</td>
<td>5.8</td>
<td>2.1</td>
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<tr>
<td>Self Management Education</td>
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<td>13</td>
<td>9</td>
<td>4</td>
<td>5.7</td>
<td>1.8</td>
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<tr>
<td>Goal Setting</td>
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<td>3</td>
<td>5.3</td>
<td>1.5</td>
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<td>Problem-Solving Skills</td>
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<td>3</td>
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<tr>
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<td>4</td>
<td>6.2</td>
<td>1.6</td>
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<td>Coordination of Referrals</td>
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<td>10</td>
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<td>7.2</td>
<td>1.4</td>
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<tr>
<td>Ongoing Quality Improvement</td>
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<td>4</td>
<td>6.1</td>
<td>1.7</td>
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<tr>
<td>System for Documentation</td>
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<td>4</td>
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What we learned....

- Understanding about self management support widely varies
- Not everyone had basic self management skills and understanding of key concepts
- Staff are resistant to change and overwhelmed
- Individuals and teams need support to begin from where they are
- Changing the culture of care will take time and require an investment
Plan: Staff training on self-management skills

- Four lunch time sessions over 4 weeks with a healthy lunch provided
- Patient schedules altered to ensure that staff would be able to attend
- Sessions spaced out by one week so that staff can set their own goals and report on them at the next meeting
- Training agenda focus on staff setting personal self-management goals and then on how to properly interact with patients using a defined method of self-management action planning
Build Excitement about Self Management

- Personal letter of invitation
- Flyers
- Reminders

PLEASE JOIN US
For a 4 week lunch time workshop

Understanding Self Management
....to increase skills that facilitate self management goal setting and positive behavior change

<table>
<thead>
<tr>
<th>When</th>
<th></th>
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<tbody>
<tr>
<td>Week 1</td>
<td>Feb. 10, 2010</td>
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<td>Week 2</td>
<td>Feb. 24, 2010</td>
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<td>Week 3</td>
<td>March 3, 2010</td>
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<td>Week 4</td>
<td>March 10, 2010</td>
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</tbody>
</table>

Where –
- Whipple Staff will meet at Robinson Annex
- Scarbro Staff in Conference Room below Pharmacy

Lunch and Lunch-time Coverage Provided!

- Workshops begin at 12:15 and will be over by 1
- Afternoon sessions will begin at 1:15
- We will start and end on time
Evaluation and Self Management Knowledge Survey

- Comments about what they liked:
  - The pace of information
  - Not pressured
  - Time for practicing
  - Helpful personally
  - Helped me to get motivated
  - All “goals” don’t have to be large
  - Talking about everyday health
  - Action plans make changes less overwhelming

- 98% scored 100%
Certificate of Completion

Name

Has successfully completed the 4 hour staff training

Understanding Self-Management
And Motivational Interviewing

February 10; February 24; March 3; March 10, 2010
New River Health Association, Scarbro, WV

Marshall University
Center for Rural Health

Yvonne Mims

Susie Criss

Date
Self Management QI Committee

- Summarized and reviewed PCRS data and training process
- Sent out email invitations to PCRS re-assessment
- Plans in place to send PCRS to staff at other 2 clinic sites and repeat training
- Offer another chance for people to do PCRS and training in summer
- On going regular meetings to keep process moving
Chronic Disease Self Management Program Workshops
Outcomes of Interest

- Monitor clinic data for increase in % of patients with documented self management goal
- Ongoing documentation of self management system change
- Improvements in process and outcomes data
“The PCRS tool is helping us plan and document an overall culture change at New River. It helps us define self management standards for our system of care and patient interactions. This change is not going to happen overnight. Using the PCRS can allow us to stay on course as we move forward over the coming years.”

- Jennifer Boyd, PA-C, Medical Director
New River Health Association
4/2010
Helpful Resources

- Electronic PRCR: [http://improveselfmanagement.org](http://improveselfmanagement.org)
- Diabetes Initiative website with paper version of PCRS: [http://diabetesinitiative.org](http://diabetesinitiative.org)
- Coming soon! [http://selfmanagementonline.org](http://selfmanagementonline.org)

Thank you!

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