Engaging Patients in Primary Care Teams Continuous Improvement

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Learning Objectives

1) Understand key steps/considerations for engaging patients in team level improvement

2) Identify methods to measure impacts of a patient engagement program

3) Describe the value of collaborative partnerships in patient engagement program development
Which best describes your primary role?

1. Researcher
2. Healthcare Provider/Clinician
3. Healthcare Administrator
4. Student
5. Other

0% 0% 0% 0% 0%
Where are you participating from (currently)?

1. N. WI
2. C. WI
3. S. WI
4. Other Midwest
5. Other
Redesigning Primary Care at UW Health

• Began in 2008 to address
  – Suboptimal health outcomes
  – Primary care physician and workforce attrition
  – Outdated care model and payment incentives

• Primary Care Redesign Vision
  – Easy and timely access
  – High quality, flexible and affordable care
  – Satisfying and sustainable work environment
  – Team-based care
  – Uses existing and emergent technologies

• Multi-level Redesign Approach
  – System
  – Clinic
  – Team / Microsystem
Low Transformation

Asse ssing, Diagnosing And Treating Your Microsystem

Technical Skills

Relational Skills

INTENSITY

High

UW Health Primary Care Vision

The first 6 months

6 to 12 months

1 year and beyond...

4 hour learning sessions

Progress report @ 12 months

Weekly meetings with coach support as needed

Routine team meetings

New daily habits

Weekly meetings with coach support

Sharing/learning with other teams

Access to a coach

4 hour learning sessions

Progress report @ 12 months

Weekly meetings with coach support as needed

Routine team meetings

New daily habits

Sharing/learning with other teams

Access to a coach

Coaching Support

INTENSITY

High

Assessing, Diagnosing And Treating Your Microsystem

Technical Skills

Relational Skills

Transformation

3 6 9 12 18 24
58 Trained Microsystems Teams in Primary Care (as of September 2013)
Patient Engagement Was Added to the Microsystem Program

Q: Why?
A: Patients provide real value to the redesign process that could not be achieved in any other way.

• The existing Microsystem Program provided a structured opportunity to teach new skills and implement standard tools.
Collaborative Partnership

Engaging Collaborative Partners

- UWSMPH Health Innovation Program
  - Recognized value of action-based research
- UW Center for Patient Partnerships
  - We knew the Why, but not the How

Activities

- Environmental Scan
  - What Programs/Models existed?
- Co-developed & Evaluated the Program
  - Created the program we wanted, iterative learning
“Instead of waiting to see how it will affect the patient, we can just ask her because she’s right there.”

– Microsystem Team Member, commenting on having a patient regularly participate in their weekly team meetings
What is Patient Engagement?

• An active process of ensuring that our patients’ experience, wisdom and insight are infused into individual care and the design and refinement of our care systems.

• Patient Engagement is fundamental to UW Health: “Actively engage patients, families, employees, learners and volunteers in pursuit of service excellence in partnership with clinicians, staff and administrators.”
• UW wanted a practical, capacity-building patient engagement strategy for Microsystem, team-based Practice Redesign

• SCAN = No best practice guidelines for team-level patient engagement programs for practice redesign existed

• Resources for policy, organizational, or individual level
Environmental Scan 2013

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AHRQ
Agency for Healthcare Research and Quality
Advancing Excellence in Health Care

Home > For Professionals > Hospitals & Health Systems > Hospital Resources > Guide to Patient and Family Engagement in Hospital Quality and Safety

Clinics & Providers
Education & Training

Guide to Patient and Family Engagement in Hospital Quality and Safety
A Multidimensional Framework For Patient and Family Engagement In Health and Health Care

Gap: Team-level QI Engagement

Factors influencing engagement:
- **Patient** (beliefs about patient role, health literacy, education)
- **Organization** (policies and practices, culture)
- **Society** (social norms, regulations, policy)
Health Canada’s Public Involvement Continuum

Adapted from Patterson Kirk Wallace


 Levels of Patient Engagement

- Continuum of engagement
- All engagement is valuable
- Different levels meet different needs
- The higher the level, however, the richer the experience and the more input patients can provide

<table>
<thead>
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<th>Engagement Levels</th>
<th>Definition and Methods</th>
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<tr>
<td>INFORM/Educate</td>
<td>Patients are recipients of information and education</td>
</tr>
<tr>
<td>GATHER</td>
<td>Patients are informers</td>
</tr>
<tr>
<td>DISCUSS</td>
<td>Patients are in dialog with providers</td>
</tr>
<tr>
<td>INVOLVE</td>
<td>Patients are advisors</td>
</tr>
<tr>
<td>PARTNER</td>
<td>Patients are full participants</td>
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</table>
UW Health’s Experience and Your Experience
The Penless Survey

- Used to get patient input on waits and delays, responsiveness in real time – patients can complete at the end of their visit
- Very simple & effective – patients just make a tear to indicate their response
Examples of Patient Engagement from Microsystems Teams

- Feedback on
  - New family letters – welcoming new patients
  - New brochures/Patient education materials
  - New initiatives

- Focus Groups & Patient and Family Advisory Councils
Have you engaged patients in quality improvement efforts?

1. Yes, frequently
2. Yes, occasionally
3. Yes, once before
4. No
5. Not applicable/ Not part of my job
If you have engaged patients in QI: Highest Level of Engagement Achieved

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<tr>
<td>Partner 5</td>
<td>Patients are full participants</td>
</tr>
<tr>
<td>Involve 4</td>
<td>Patients are advisors</td>
</tr>
<tr>
<td>Discuss 3</td>
<td>Patients are in dialog with providers</td>
</tr>
<tr>
<td>Gather 2</td>
<td>Patients are informers</td>
</tr>
<tr>
<td>Inform/Educate 1</td>
<td>Patients are recipients of information and education</td>
</tr>
</tbody>
</table>

0% 0% 0% 0% 0%
• Now, turn to your neighbor, and discuss your experiences engaging patients in team level QI work, or your aspirations to do so…
Program Design
Program Design

- Empowerment/training of coaches
- Readiness Assessment
- Large group trainings & Individualized meetings with teams
- Consult on engagement strategies
- Support efforts
  - e.g. focus groups, advisory panels
Co-Created Materials

• Toolkits with Worksheets & Step-by-Step guide
  – Coach version
  – Team version
• Patient Welcome Packet Template
• Additional Patient QI Booklet
• Guide to Internal Resources & Policies
Steps to Engagement

Engagement Essentials – The “How To” Worksheet

1. Discernment
2. Matching Engagement Methods with Projects
3. Defining the Job for Patients
4. Recruiting Patients
5. Welcoming Patients
6. Celebrating Successes and Capturing Lessons
Discernment

• Critical not to jump over this step
• Team members need a **shared understanding** of the value of engaging patients
• Tools include:
  – Team readiness survey
  – Myth and Facts sheets
  – Engagement Ladder
  – Patient and Provider Concerns (and responses)
Beliefs about Patient Engagement

- We have to do what patients want
- Patients will see our mistakes and judge us
- HIPAA prohibits/limits patient engagement
- Patients don’t know enough about the business of healthcare to add value
- Patients will only vent about own experience
- Skepticism about their interest in QI details
Our Concerns

Let’s talk about hesitations about engaging patients.
Outcomes Measurement: Action Research Framework
What is Action Research?

- Participative and collaborative
- Situation based and context specific
- Develops reflections based on interpretations made by the participants
- Knowledge is created through action and at the point of application
Stakeholder Identification

• Organizational Leaders
• Coaches
• Teams
• Patients
Data Collection Options

- Quantitative
  - Surveys
  - Engagement activity tracking

- Qualitative
  - Open ended survey questions
  - Direct observation
  - Interviews (individual or group)
Evaluation Timeline

- Pre/Post Leadership Survey
  - 2009
- First Team Surveys
  - 2010
- Team Activity Tracking
- Direct Observation
- Organizational/Program Leader Focus Groups
  - 2013
Open-Ended Survey Questions Asked of Leadership

• What are examples of consumer/patient engagement that are currently happening?
• What are examples of consumer/patient engagement that you would like to see happen?
• What are some of the barriers to consumer/patient engagement that you see?
• What might help to increase consumer/patient engagement at this organization?
Open-Ended Survey Questions Asked of Team Members & Coaches

• List two things you learned about engaging patients during the past 6 months.
• What, if anything, needs to happen to enable your team to engage patients?
How ready do you think your organization is to engage patients at all levels of the organization’s mission?

I believe that patients bring a perspective to a project that no one else can provide.

I am interested in engaging patients in projects.

I am confident of my [team/organization’s] ability to engage patients in projects.
Focus Group Questions Asked of Leadership/Program Management

- What are the key organizational components necessary for patient involvement with care teams?
- What were critical lessons learned from the patient involvement process to date?
Evaluation Timeline

Pre/Post Leadership Survey

2009

First Team Surveys
Team Activity Tracking
Direct Observation

2010

Organizational /Program Leader Focus Groups

2013
## Highest Level of Patient Engagement Attained by Teams (N=49)

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<th>Highest Level Achieved</th>
<th>Number of Teams (%)</th>
<th>Activities</th>
<th>Patient Engagement Contributions</th>
</tr>
</thead>
<tbody>
<tr>
<td>None</td>
<td>5 (10%)</td>
<td>N/A</td>
<td>N/A</td>
</tr>
<tr>
<td>Level 1: Inform/Educate</td>
<td>0 (0%)</td>
<td>Visibility walls, patient education materials</td>
<td></td>
</tr>
<tr>
<td>Level 2: Gather</td>
<td>20 (41%)</td>
<td>Surveys, cycle times, penless surveys, phone surveys, interviews, in-person feedback, paper surveys</td>
<td>• Cycle time data collected by patients led team to decrease wait time in the exam room.</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>• Patient feedback about receiving immunizations prior to MD visit (90% supported) led this process change to be the standard.</td>
</tr>
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## Highest Level of Patient Engagement Attained by Teams (N=49)

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<td>Level 3: Discuss</td>
<td>18 (37%)</td>
<td>Focus groups, phone conversations, team meetings, phone interview, paper surveys, interviews in clinic, paper surveys, e-mail feedback, phone surveys, asking for patient feedback on group visits</td>
<td>• Phone discussions with patients led to highlighting physician instructions on the After Visit Summary.</td>
</tr>
</tbody>
</table>
| Level 4: Involve        | 4 (8%)              | Advisory panels, patient panel, focus group                               | • Focus group helped develop a communication to parents to help prepare for adolescent appointments.  
• Focus group discussion led to change in waiting room layout to make more welcoming and conversational. |
<p>| Level 5: Partner        | 2 (4%)              | Team member                                                               | • Patients participating in team meetings changed the conversation and helped to shift the culture  |</p>
<table>
<thead>
<tr>
<th>Survey Question</th>
<th>Timing</th>
<th>Strongly Disagree</th>
<th>Disagree</th>
<th>Neutral</th>
<th>Agree</th>
<th>Strongly Agree</th>
<th>P-value (pre/post)</th>
</tr>
</thead>
<tbody>
<tr>
<td>I believe that patients bring a perspective to a project that no one else can provide.</td>
<td>Baseline N=134</td>
<td>0%</td>
<td>3%</td>
<td>12%</td>
<td>57%</td>
<td>28%</td>
<td></td>
</tr>
<tr>
<td></td>
<td>6 months N=103</td>
<td>0%</td>
<td>2%</td>
<td>4%</td>
<td>54%</td>
<td>40%</td>
<td>0.01</td>
</tr>
<tr>
<td></td>
<td>12 months N=98</td>
<td>0%</td>
<td>0%</td>
<td>11%</td>
<td>48%</td>
<td>41%</td>
<td>0.03</td>
</tr>
<tr>
<td>I am confident of my ability to engage patients in microsystem improvement work.</td>
<td>Baseline N=134</td>
<td>1%</td>
<td>4%</td>
<td>30%</td>
<td>52%</td>
<td>13%</td>
<td></td>
</tr>
<tr>
<td></td>
<td>6 months N=103</td>
<td>0%</td>
<td>2%</td>
<td>20%</td>
<td>60%</td>
<td>17%</td>
<td>0.03</td>
</tr>
<tr>
<td></td>
<td>12 months N=98</td>
<td>0%</td>
<td>7%</td>
<td>18%</td>
<td>49%</td>
<td>25%</td>
<td>0.02</td>
</tr>
</tbody>
</table>
## Longitudinal Team Member Survey Responses

<table>
<thead>
<tr>
<th>Survey Question</th>
<th>Timing</th>
<th>Strongly Disagree</th>
<th>Disagree</th>
<th>Neutral</th>
<th>Agree</th>
<th>Strongly Agree</th>
<th>P-value (pre/post)</th>
</tr>
</thead>
<tbody>
<tr>
<td>I am interested in engaging patients in microsystem improvement work.</td>
<td>Baseline N=133</td>
<td>1%</td>
<td>4%</td>
<td>30%</td>
<td>49%</td>
<td>16%</td>
<td></td>
</tr>
<tr>
<td></td>
<td>6 months N=103</td>
<td>0%</td>
<td>0%</td>
<td>15%</td>
<td>56%</td>
<td>29%</td>
<td>&lt;0.0001</td>
</tr>
</tbody>
</table>
Themes from “Top Two Things Learned about Patient Engagement”

- Patients want to engage with teams and appreciate the opportunity to do so.
- Specific preparation, planning and skill cultivation is necessary for teams to engage patients.
- Incorporating the patient perspective is valuable.
- “Patients have a great insight into their care.”
Financial support and protected time to do this work is necessary.

The team needs to agree upon the importance of patient engagement and commit to doing the work involved.
• Focus group/interviews of patients willing to engage and not engage
• Linking level of engagement to outcomes
  – Patient satisfaction surveys
  – Measures of access/quality
1) Understand key steps/considerations for engaging patients in team level improvement

2) Identify methods to measure impacts of a patient engagement program

3) Describe the value of collaborative partnerships in patient engagement program development
Thank You!

QUESTIONS?
• This work would not have been possible without the participation of the Microsystems teams and our patient partners.

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• Health Innovation Program
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