About the Planned Care Visit Video

improving chronic illness care

The Planned Care Visit video is designed to demonstrate how health care teams implement innovations in care for people who live with chronic illness. The 34-minute video takes viewers on a planned care visit in a typical office setting. The first video segment is seen through the eyes of a diabetes patient, the other two are seen through those of health care providers. While a diabetes patient is featured, these elements of planned care can be applied to people who live with any chronic condition.

The video is based on the Chronic Care Model designed by The Robert Wood Johnson Foundation's Improving Chronic Illness Care program and assumes viewers have a basic understanding of the model. A diagram of the model is included along with a Facilitator Discussion Guide at the end of this introduction. The video includes subtitles that highlight important concepts. Within each segment, the actual time elapsed for the patient/clinician interaction is noted. Start times for each segment are printed on the video tape label.

THE PLANNED CARE VISIT VIDEO CONTAINS THREE PARTS:

- The Patient Experience
- The Provider Point of View
- The Self-Management Interview

Clinicians and administrators will benefit from the first two segments of the video. The third segment is the complete self-management interview from segment one, and is for use by clinicians who do in-depth self-management plans with patients.

THE PATIENT EXPERIENCE

(Segment time: 16:04)

The first segment walks viewers through a planned care visit, starting with the outreach call and preparation, through the activities of the visit and ending with the second follow-up call. Viewers follow Mrs. Adams, a person with diabetes, as she experiences an outreach call from her physician's office and participates in visits with her doctor and the team nurse. In these interviews, Mrs. Adams begins taking control of her disease management by agreeing to start basic lifestyle changes. While portions of the physician and self-management interviews have been edited, the actual time elapsed for each encounter is displayed at the end of each segment.

THE PROVIDER POINT OF VIEW

(Segment time: 5:00)

The second segment shows the activities of the health care team as they implement the elements of planned care. The emphasis is on preparation, teamwork and communication to provide guideline-driven care and to support Mrs. Adams in managing her condition on a daily basis.

THE SELF-MANAGEMENT INTERVIEW

(Interview shown in its entirety. Segment time: 12:07)

The nurse and patient self-management interview from the first segment with Mrs. Adams is shown here in its entirety, including the use of collaborative goal-setting, creating an action plan and problem-solving to overcome self-management barriers. Subtitles are used throughout the segment to highlight useful techniques for engaging and supporting patients and teaching self-management skills.

Facilitator Discussion Guide

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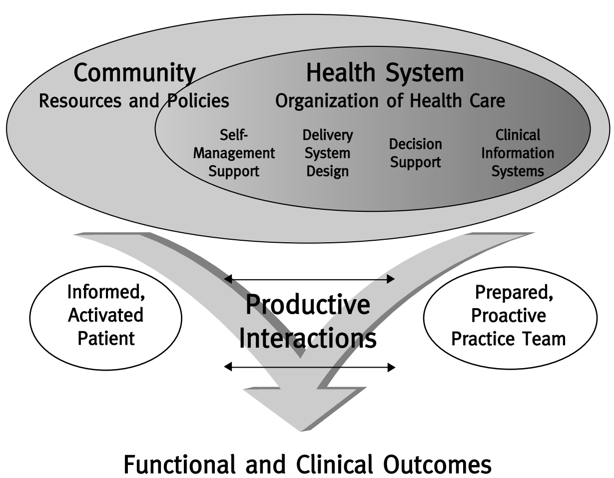
- What are the components of planned care?
- What parts of the Chronic Care Model did you see demonstrated in the video? How do they interact?
- What subpopulations might your team want to target first with planned care visits?
- What guidelines might you want to address?
- How will you schedule your planned care visits? Individually? Sequentially in a morning mini-clinic? Group visits?
- What steps will you take to assure preparation of assessments and labs in advance of a visit?
- How could a morning huddle work in your setting?
- How and when can your team learn about new guidelines?
- How might your team assign roles and tasks for planned care?
- How might your team arrange coverage for outreach or follow-up calls?
- How can your team assure that patients feel supported by the whole team?
- What might your team do to improve communication and coordination during visits?
- How will you assure follow-up is conducted?

The Chronic Care Model



For more information about the video or Improving Chronic Illness Care, please visit www.improvingchroniccare.org or contact Judith Schaefer at (206) 287-2077.

A Guide to the Planned Care Visit Video

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The following is an annotated "Table of Contents" for the segments of the Planned Care Visit video. It recapitulates the titles and subtitles for each of the segments, recalling major content areas and the tips or techniques featured in that segment. Actual time elapsed for each interaction is noted for phone calls and interviews to demonstrate the duration of these interactions.

THE PATIENT EXPERIENCE

THE OUTREACH CALL

(Entire time of call: 1 min. 45 seconds)

- Proactively schedule patient visits
- Be sure to explain the purpose of the visit and what to expect
- Discuss preparation for the visit, and ask the patient to complete lab work and a self-assessment questionnaire

THE PLANNED OFFICE VISIT

Preparation

- Collect the patient's data, such as lab test results, assessments and charts, before the visit
- Explain clinical guidelines to the patient and ask screening questions

The Physician Interview

(Elapsed time for interview: 5 min. 51 seconds)

- Discuss the planned care visit so that the patient knows what to expect
- Provide guideline-based screening and assessments
- Talk with the patient to initiate a treatment plan
- Help the patient feel supported by the entire health care team

THE SELF-MANAGEMENT INTERVIEW

Patient/Clinician Interview

(Abbreviated interview time: 6 min. 53 seconds; entire interview time: 11 min. 27 seconds)

- Review the patient's visit with the physician as well as the treatment priorities
- Discuss the guidelines for care with the patient
- Emphasize the patient's central role in their care
- Whenever possible, create opportunities for learning experiences, for example, explain the connection between the patient's behavior and lab values
- Work with the patient to create a behavior change plan
- Assess the barriers that stand in the patient's way
- Schedule follow-up calls for support

Follow-Up Calls

(First call time: 2 mins. 30 seconds; second call time: 1 min. 12 seconds)

- Ask for the patient's experience with the plan
- Avoid guilt or blame if the patient has not followed the plan
- Affirm the patient experience
- Problem-solve - revise the plan to ensure success
- Encourage the patient by expressing empathy and support

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THE PROVIDER POINT OF VIEW

Use a Registry

- Use the registry to identify subpopulations of patients out of compliance with guidelines
- Use registry summaries to guide care for individual patients
- Create lists of patients who might participate in planned visits, group visits or classes
- Be creative when sharing tasks among team members

The Team Huddle

- Review the daily schedule with the whole team
- Update the team on new guidelines
- Coordinate the roles and tasks among team members

During the Visit

- Have all the patient data available, such as charts, assessments and lab results
- Prepare the physician for a productive visit with the patient
- Communicate - link the treatment plan with self-care support
- Help the patient recognize the whole health care team supports their care
- Communicate and reinforce the plan among team members
- Share success stories among team members

THE SELF-MANAGEMENT INTERVIEW

Patient/Clinician Interview

(Elapsed time 12 min. 07 seconds)

- Review the patient's visit with the physician as well as the treatment priorities
- Discuss with the patient the guidelines for care
- Emphasize the patient's central role in their care
- Ask for the patient's goals for their health
- Work with the patient to create a behavior change plan
- Ensure that the changes are reasonable for this individual
- Be specific when planning behavior changes, asking how, when, where, how much and how often
- Assess the barriers that stand in the patient's way
- List alternative solutions
- Assess the patient's confidence level for each behavior
- Modify the plan to raise the patient's confidence level where necessary
- Give the patient a copy of the plan
- Schedule follow-up calls for support

Tips for Supporting Behavior Change

- Ask open-ended questions and use reflective listening throughout the interview
- Make sure the plan supports and reflects the patient's values
- Acknowledge the patient's feelings and offer support
- Tailor your information to the patient's questions
- Don't tell the patient - ask how they want to approach their care
- Whenever possible, create opportunities for learning experiences, for example, explain the connection between the patient's behavior and lab values