

**Right Care.
Right Time.
Every Time.**

Exploring Patient Engagement in Plan of Care and Policy and Procedures

Session 3- Patient Engagement Webinar Series

Thursday, April 19, 2018 at 12:00 PM CDT



Objectives

- Review ideas for incorporating patient engagement into facility policy and procedures.
 - Discuss the related ESRD Conditions for Coverage
 - Define policy and procedures
 - Identify opportunities for improvements
- Review tools for engaging patients and families in their Plan of Care meetings
 - All About You Plan of Care Toolkit
 - My Questions & Goals checklists
- Share facility perspective on engaging patients in POC process

Polling Questions

Does your facility have any policies and procedures that include patient engagement?

- Yes
- No
- I don't know
- I don't understand why we're discussing it- we are corporately owned

Chat:

What are the P&P's regarding?

§ 494.150 Condition: Responsibilities of the medical director.

V714 (c) Policies and procedures.

- The medical director must—
 - (1) Participate in the development, periodic review and approval of a “patient care policies and procedures manual” for the facility; and

Interpretive Guidance

- Written patient care policies and procedures are an essential reference for clinical staff and **should reflect current practice at the facility**. The patient care policies and procedures should address all areas of patient assessment and care delivery for the dialysis modalities provided...
- There must be evidence that the medical director reviewed and approved the patient care policies and procedures and any revisions as they are made.
- Corporate-owned or corporate-managed facilities may use standard policies and procedures developed by the corporation. **There should be a mechanism for the facility medical director to have input into the policies and procedures, and to have some authority to individualize corporate policies to address unique facility situations.**



Definitions



Policy

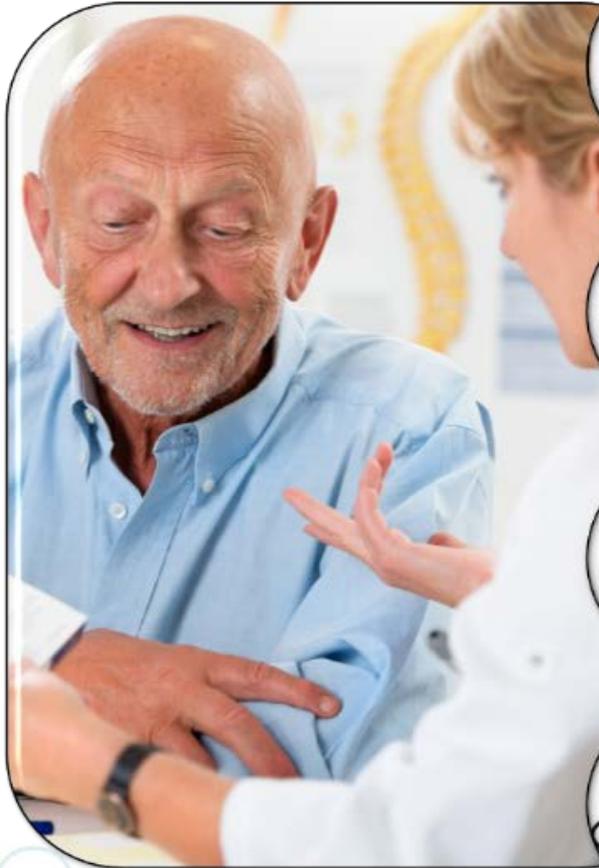
- A formal, brief, and high-level statement or plan that embraces an organization's general beliefs, goals, objectives, and acceptable procedures for a specified subject area.
- Focus on desired results, not on means of implementation.



Procedures

- Describes the process: who does what, when they do it, and under what criteria.
- A series of steps taken to accomplish an end goal.
- Defines "how" to protect resources and are the mechanisms to enforce policy.
- Provides a quick reference in times of crisis.

Examples of Patient Engagement in Facility Policies & Procedures



Patient Education



Patient Auditing

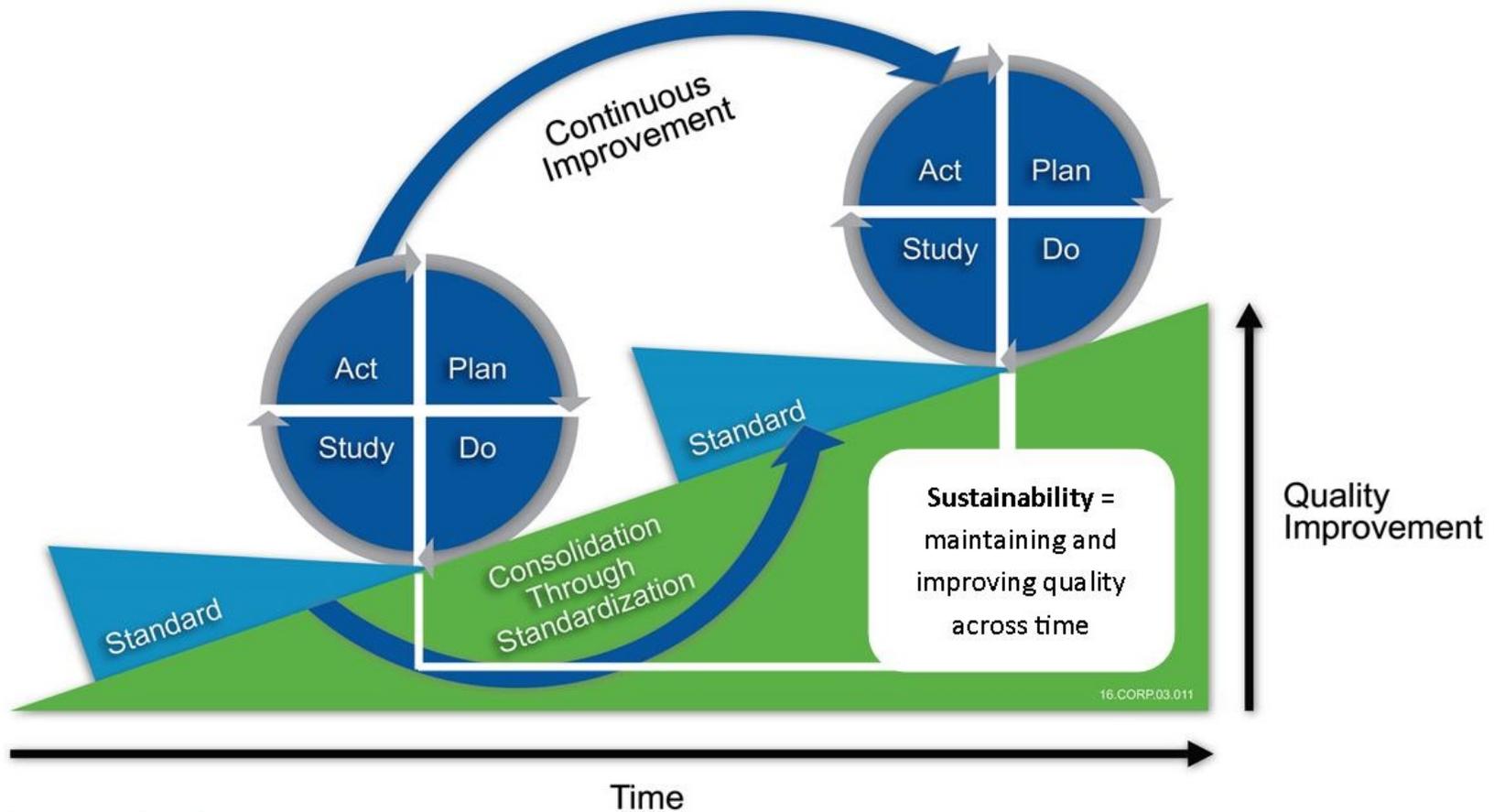


Patient Self-Care



Patient and family involvement in Plan of Care Meetings

Why incorporate into your facility standard operating procedures?



Qsource.
ESRD Network 12



§ 494.90 Condition: Patient Plan of Care

V541: The IDT team must develop and implement a written, individualized comprehensive plan of care...

Interpretive Guidance

- The interdisciplinary team (IDT) consists of, at a minimum, **the patient or the patient's designee** (if the patient chooses), a registered nurse, a physician who is treating the patient for ESRD, a social worker, and a dietitian.
- The facility **must recognize** the patient or his/her designee as a member of the IDT **and encourage the patient's participation in developing and updating the plan of care.** The patient's needs, wishes, and goals must be considered in making decisions about the plan of care.



Patient. Centered.

“All About YOU” Plan of Care Toolkit

Re-branding POC to make it meaningful to patients.



Toolkit resources

- Patient
 - “All About YOU Review” patient overview
 - Plan of Care meeting invitation
 - “Let Us Know How We Did” post-POC meeting questionnaire
- Staff
 - Plan of Care prep checklist
 - “Getting Off to the Right Start with Plan of Care” staff guide
 - Additional resources for reference relating to POC (ERA, MAT, KDQOL-36, Conditions for Coverage for ESRD Renal Disease Facilities: Interpretive Guidance–V540 § 494.90 Condition: Patient plan of care)

Prior to each resource in the toolkit there is a description provided and instructions for utilization.

Patient Invitation

On behalf of your entire care team, we would like to invite you to join us for your...

All About YOU Review

NAME: _____

Also called your plan of care meeting, this is the time set aside just for YOU to meet with the entire care team all at once. As your care team, we want to help you meet your goals and get to know what is most important to YOU. This is your chance to have your care team's attention to ask questions, tell us your concerns, and share your personal goals. During this time we will work together with YOU to make a plan that helps you be successful and improve the quality of life that you want. Plan to join us on:

WHEN: _____

WHERE: _____

CUT HERE AND RETURN THE BOTTOM HALF TO A MEMBER OF YOUR CARE TEAM TO HELP US PREPARE FOR OUR

1. Name: _____

2. I would like to participate in my All About YOU Review meeting:
 In person By phone Other: _____

3. I am inviting others to join the meeting:
 Yes No
 If yes, name(s): _____
 Relationship to me: _____

4. I want to talk about (check as many as apply):
 My life goals _____
 Home treatment choices _____
 Transplant _____
 My dialysis successes including _____
 My struggles with dialysis including _____
 I could use some help with _____
 My questions: (you may write on the back if you need more room)
 • _____
 • _____
 • _____

Contact us if you have any questions and we look forward to meeting with you!

1. Name: _____

2. I would like to participate in my All About YOU Review meeting:
 In person By phone Other: _____

3. I am inviting others to join the meeting:
 Yes No
 If yes, name(s): _____
 Relationship to me: _____

4. I want to talk about (check as many as apply):
 My life goals _____
 Home treatment choices _____
 Transplant _____
 My dialysis successes including _____
 My struggles with dialysis including _____
 I could use some help with _____
 My questions: (you may write on the back if you need more room)
 • _____



Qsource
ESRD Network 12



We're Here For You.

Post POC Questionnaire

Let us know how we did!

**All About
YOU Review**

1. Was this your first time to participate in your All About YOU Review? Yes No

If yes, what has kept you from participating before? (check all that apply)

- I didn't know about it transportation issues repeat of info I already know
 time involved inconvenient time personal conflicts
 other: _____

Please answer questions #2 through #7 with a 1 to 5 ranking.

(1 = Strongly disagree, 2 = Disagree, 3 = I don't know, 4 = Agree, and 5 = Strongly agree)

2. This meeting was helpful. 1 2 3 4 5

3. The time worked for me. 1 2 3 4 5

4. I had enough privacy to talk with the care team. 1 2 3 4 5

5. My comments/concerns were respected. 1 2 3 4 5

6. We talked about topics that were important to me. 1 2 3 4 5

7. I plan to attend my next All About YOU Review. 1 2 3 4 5

8. What can we (your care team) do to make these meetings better?

Staff POC Prep Checklist

Plan of Care Prep Checklist

**All About
YOU Review**

MONTH: _____

Name	Provide invitation	Collect pt input	Review KDQoL	Type: 30 day/90 day/annual/status change	Deliver/collect follow-up questionnaire

Staff guide

Getting Off to the Right Start with Plan of Care



INTRODUCTION

The plan of care (POC) meeting is an integral part of patient-centered care. Too often, patients and families feel that this meeting is a formality that only summarizes the regular ongoing meetings with individual members of the interdisciplinary team (IDT), when actually it is a chance for an interactive All About YOU Review. To make the POC as effective as possible, it is important to get the meeting started on the right foot, before the meeting, during the meeting, and after the POC session. By taking the time to prepare the patient to be the "driver" of their care, a

RIGHT preparation

Set the expectation for patients to attend and communicate the importance of participation. Give patients plenty of notice. Create an agenda addressing both patient and staff goals and set a time limit to keep the meeting focused. Provide an opportunity for patients to write down their questions or concerns ahead of time.

RIGHT preparation

Set the expectation for patients to attend and communicate the importance of participation. Give patients plenty of notice. Create an agenda addressing both patient and staff goals and set a time limit to keep the meeting focused. Provide an opportunity for patients to write down their questions or concerns ahead of time.

RIGHT way

"This truly is an All About YOU Review and we are all here to help you make a plan to reach the goals you have for your life." Such an opening statement sets the tone for the meeting. Use the patient's/care partner's questions or concerns as the starting point for discussion. The efficacy of the POC meeting is significantly dependent on how information is presented and the manner in which the patient feels that he/she is an equal part of their healthcare team.

RIGHT way

"This truly is an All About YOU Review and we are all here to help you make a plan to reach the goals you have for your life." Such an opening statement sets the tone for the meeting. Use the patient's/care partner's questions or concerns as the starting point for discussion. The efficacy of the POC meeting is significantly dependent on how information is presented and the manner in which the patient feels that he/she is an equal part of their healthcare team.

RIGHT place

Sharing personal information in a separate room. Patients should also be given the option to join by phone.

RIGHT time

Best practices indicate that the POC is right before or after treatment and prefer to come back for a second session. The patient preference should be honored, if possible.

RIGHT people

In addition to the whole IDT, which includes the patient, others may be present. Care providers who contribute to the patient's well-being, such as nursing home staff, should be included to provide input. The patient can request to have family/care partner present also. Offer everyone the option to join by phone.

RIGHT topics

The POC is more than a monthly assessment, and should be comprehensive. A holistic approach can ensure that the patient's lifestyle goals are the focus of care to improve both engagement as well as clinical outcomes. Start where the patient is to get the best results.

RIGHT documentation

Assist the patient with setting SMART (Specific, Measureable, Achievable, Realistic, Timely) goals and document them in the POC. Patients' progress must be monitored, and if the expected outcomes are not met, there must be evidence that barriers were identified and that the plan was reviewed and revised.

*Offer option of joining by phone

- Patient
- Entire care team
- Care partner
- Family members
- Other care providers

- Physical
- Psychological
- Financial
- Spiritual
- Dietary
- Social
- Relationships
- Leisure

- Refer to the CMS CIC Interpretive Guidance*
- Refer to the MAT*
- Refer to the ERA*

* resource included in toolkit

EXAMPLES

- Deliver printed invitation*
- Give patient My Questions & Goals brochure*
- Complete prep checklist*
- Shared decision making
- Avoid Yes/No questions
- Unhurried
- Non-judgmental/non-blaming
- Empathetic
- Inviting



My Questions & Goals

MY LIFE

What is most important to me in my life is: _____

My current goal is to: _____

- What can I do to make it easier to fit dialysis into my life?
- What lifestyle changes can I make to be as healthy as possible?
- If dialysis is impacting my mood or quality of life, who is the best member of my care team to talk to?
- What _____

MY TREATMENT CHOICES

- What are the advantages and disadvantages of:
 - ◊ Hemodialysis (in-center, home, and nocturnal)
 - ◊ Peritoneal dialysis (manual andycler)
 - ◊ Kidney transplant
- Which treatment(s) may be best for me with my medical status and lifestyle?
- What do I need to do if I want to do dialysis at home?
- Can I try a different type of dialysis to see if that is a better choice for me?
- What _____

MY HEALTH

- I have had the following problems keeping me from living my life like I want:
 - ◊ muscle cramps
 - ◊ light-headed/dizziness
 - ◊ itchy/dry skin
 - ◊ pain
 - ◊ sick to stomach/vomiting
 - ◊ shortness of breath
 - ◊ swelling
 - ◊ decreased sexual functioning
 - ◊ metallic taste in mouth

MY CARE TEAM

- What does each member of my care team do?
- What can my care partner or family do to help?
- How do I contact my care team when I need them?
- How can I best take part in my care?
- What is a plan of care meeting and what happens during it?
- Why would it be helpful for me to attend my plan of care meetings?
- What can I do if I think a member of my care team is not doing their job well or is not caring about my needs?
- What can I do if I don't feel safe or comfortable at my dialysis clinic?

MY DIET

- What is a renal diet? Why is it important for me to follow?
- How will dialysis change what I can eat and drink?
- Will what I am able to eat and drink depend on the kind of treatment I choose?
- What can I do to limit the amount of fluid I take into my body daily?
- Will I still be able to go out to restaurants?
- Where can I find kidney friendly recipes?

MY QUESTIONS & GOALS

My Questions & Goals was made for you to use when meeting with any member of your dialysis care team. Choose the questions that you would like to talk about. Asking questions and sharing your concerns with your care team will help you to work together to set goals and make a plan so you can live the best life possible on dialysis.

1. I would say my current quality of life is a (circle one):
 1 2 3 4 5 6 7 8 9 10
2. I would like to be at a (circle one):
 1 2 3 4 5 6 7 8 9 10
3. Right now, I'm worried the most about:

Qsource
ESRD Network Strategies

For more information or to file a grievance please contact the Heartland Kidney Network at:
 920 Main, Suite 901
 Kansas City, MO 64105
 Toll-free Patient Line: (800) 444-9965
 net12@hw12.esrd.net • www.heartlandkidney.org

© 2012 Heartland Kidney Network. All rights reserved. This material may contain trademarks and/or registered trademarks of the Heartland Kidney Network. The content is provided for informational purposes only. Heartland Kidney Network is not responsible for any inaccuracies or omissions.

- ## Checklist Brochures-
- New patients (blue)
 - Existing patients (green)

1. I would say my current quality of life is a (circle one):
 1 2 3 4 5 6 7 8 9 10
2. I would like to be at a (circle one):
 1 2 3 4 5 6 7 8 9 10
3. Right now, I'm worried the most about:

Facility Sharing

- Danita Minor- DCI Carondelet, Network BOD

Steps for Successful Care Plans

- Appointments
- Invitation
- Care Plan Meeting
 - Encourage Facility Manager to attend.
 - Open meeting with explanation of what the care plan is.
 - Focus on improving their quality of life.
 - Focus on most pressing issues
 - Record items and goals
- Follow up with action items and goals.

Benefits of A Successful Care Plan

- + Patient directs the goals they would like to work on with the entire team – everyone is on the same page.
- + Trust level between patient and team can dramatically improve because the patient's choices and value system are respected.
- + Dialysis Team becomes more aware of patient's priorities and can focus energy on achieving their individual goals.
- + Patient is more engaged which can encourage better adherence that leads to improved outcomes.
- + Easier to track progress and find solutions when everyone is involved.

Polling Question

- Do you have at least one idea you can use from this webinar to incorporate patient engagement a facility policy and procedure?
 - Yes
 - No
 - Maybe, I need to talk to my team

Thank You

- Please complete the survey assessment for this webinar. Completion of the post-assessment will fulfill project related requirements. Please include the names and CCNs for each clinic you represent.
- If you would like additional technical assistance, please contact DeeDee Velasquez-Peralta, Patient Services Manager at 816-880-9990 or dvelasquez-peralta@nw12.esrd.net.