

# PAM Administration and Coaching for Activation

April 11, 2014



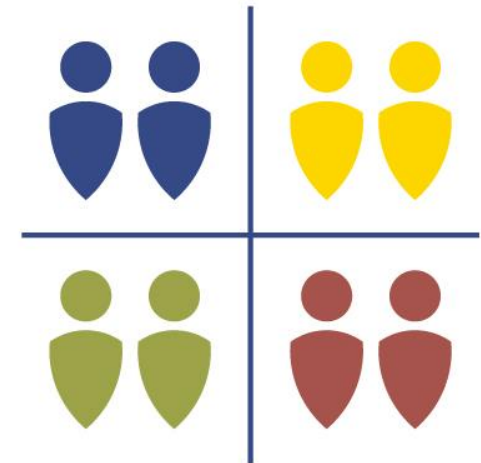


## Administering PAM Review

- Introducing PAM to a patient
- Best Practices for Administration

## Tailoring your Intervention to Support Patient Health and Self-management

- Coaching principles
- CareMaps and the Coaching for Activation website
- Case Studies
- Expected Outcomes



# What is Activation?



Activation is an individual's knowledge, skills and confidence – essential self management competencies that underlie behaviors

**Knowledge**- the understanding a person already has, or is capable of consuming, related to his or her health

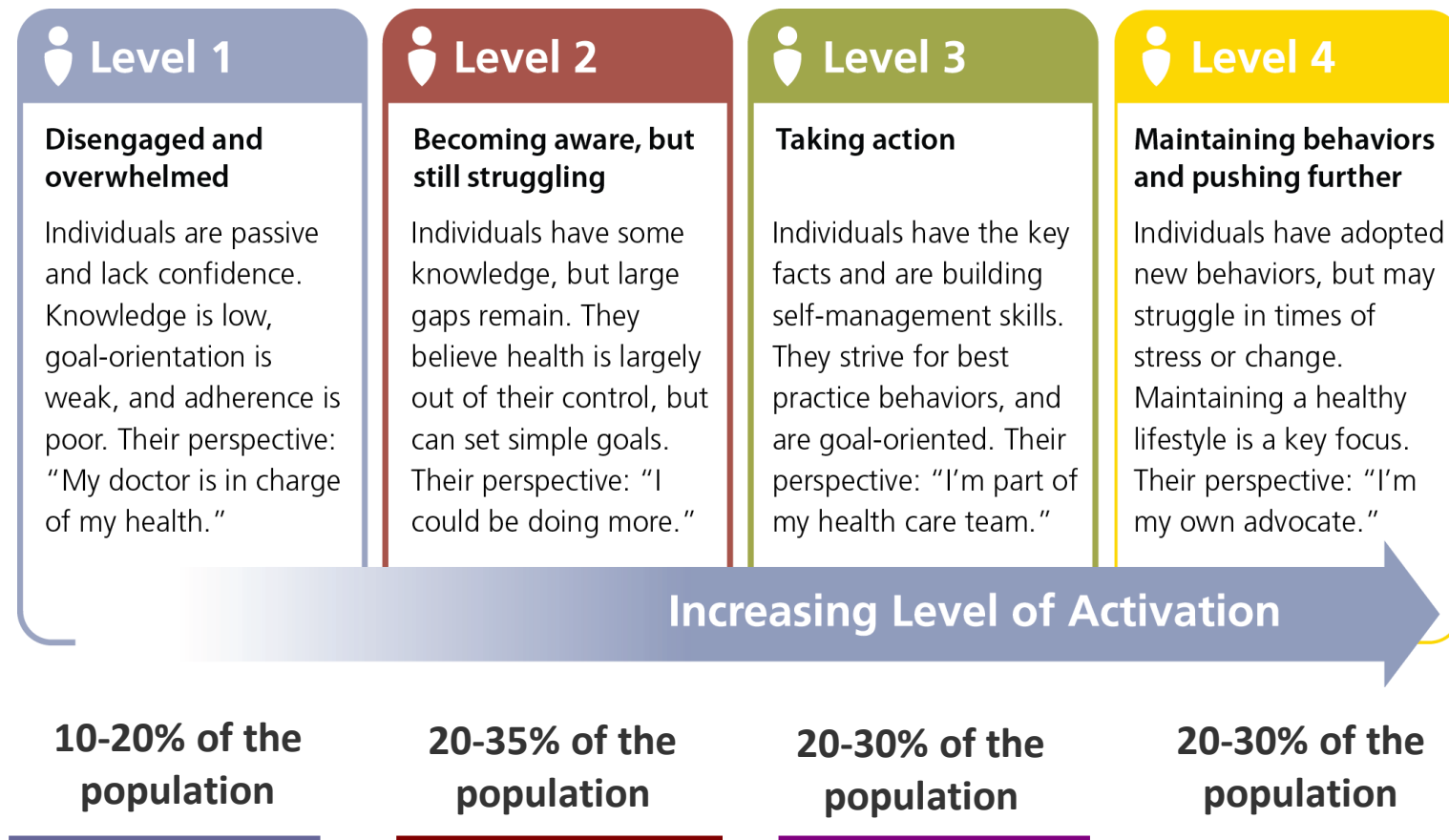
**Skills** - ability to perform tasks necessary for self-management of healthy living or condition management

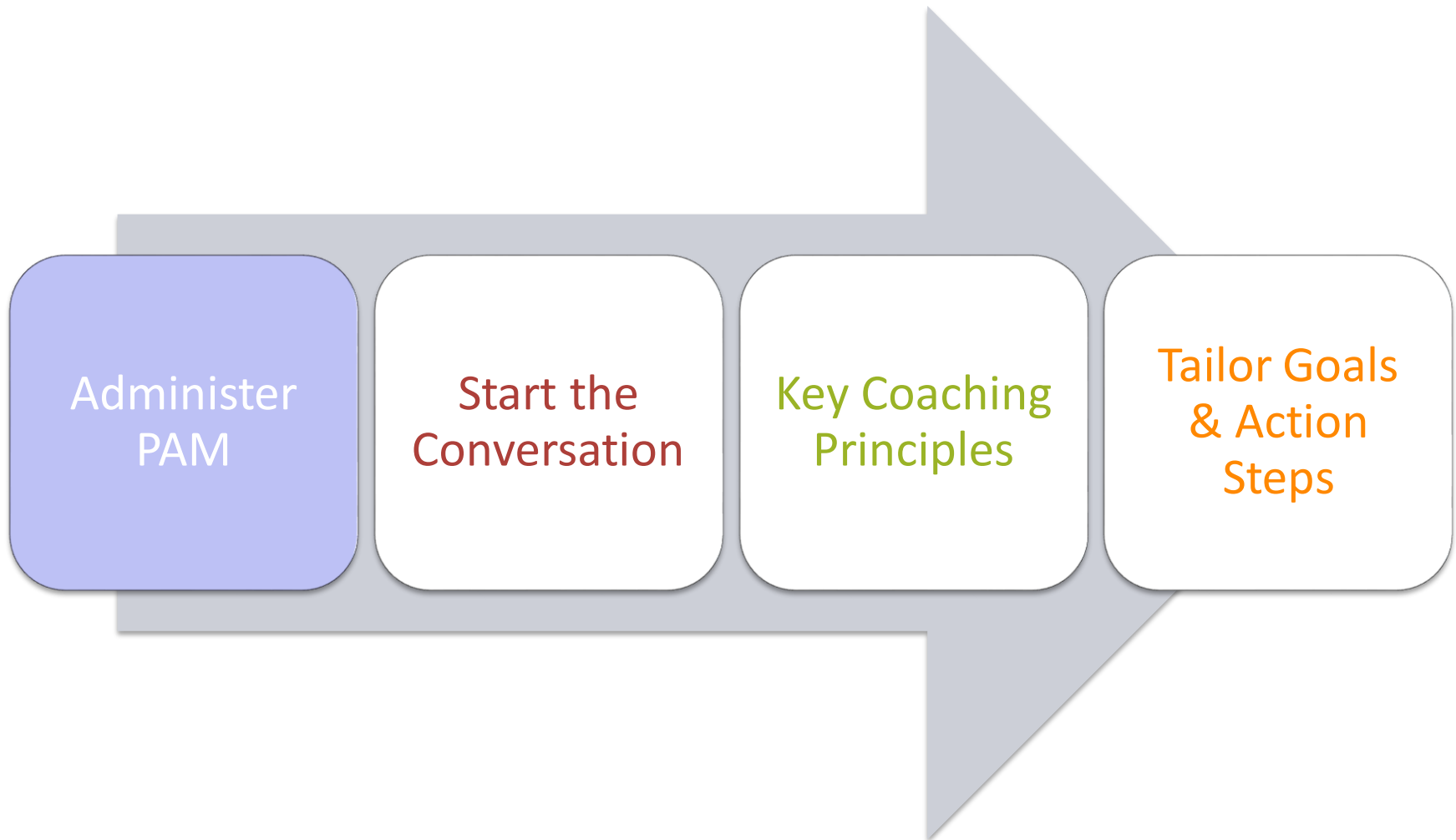
**Confidence** – an individual's belief in his or her power or ability to impact his or her health

# Activation is developmental -- four segments along a continuum



## PAM anchors our health activation model & programs





# What have we learned from our partners?

- **Practice, Practice, Practice**
- **The more comfortable you are administering the PAM, the more comfortable your patient will be**



## Timing

1. As soon as possible. Use the tool the build rapport since it allows you to meet the patient where he/she is at.

What you call the PAM and how it's introduced makes a difference

1. Survey?
2. Assessment?
3. Use a term that resonates with your population and will be salient yet non-threatening

# Enable Patient to Answer Truthfully

## Key Points

- Will help me (your nurse/case manager) personalize support
- No right or wrong answers
- Be truthful
- Take 3-5 minutes to complete
- Your responses will be held in confidence/be private



# Possible Introductions.....Make it Authentic to You

## **TRY**

“As we move forward together, I want to give you the best possible set of tools to help you, so I’d like to take the next several minutes to walk through a series of questions together. Please take your time in answering.”

## **OR**

“It’s important to me that you are supported and getting what you need from our interactions. To help me know how best to support you, I’ll ask you a handful of questions. This is important so please don’t feel rushed and be as truthful as possible because there are no right or wrong answers.”

# Possible Introductions.....Make it Authentic to You

## **TRY**

“While these next questions will only take a few minutes to answer, they do require some thought so please allow yourself time to answer. No problem if you need me to repeat the question because I want you to answer what’s true for you. All of your answers are confidential and at the end of the questions, we will have a better idea of your learning style around health.”

## **OR**

“Going forward, let’s establish a plan according to what works for you. To build that plan, I’ll ask you a few questions regarding your health management style. Your answers are confidential and the more truthfully you can answer, the better foundation we’ll have going forward.”

## PAM administration for valid and reliable results

1. Read the statements **in the order** they appear on the survey
2. Read each statement **exactly as it appears** on the survey. Do not add, remove or interpret words
3. **Provide** the person with the list of possible **responses** after each statement (*Disagree Strongly, Disagree, Agree, Agree Strongly, or NA*)

## PAM administration for valid and reliable results

4. If an person responds “Yes” instead of “*Agree*” or “*Agree Strongly*”, ask them to **clarify their response**...do they “*agree*” or “*agree strongly*”
5. If a person does not know the answer, does not believe it applies, or refuses to respond, mark *NA*
6. **Allow person time to respond** - don’ t rush to rephrase or interpret the question for a quicker response

# What can bias responses\*?

## **Issue:** Situation/ environment

- Create an environment free of judgment. Do not let the person feel as if they are being graded
- Reinforce the need for honesty in order to provide them the best possible support

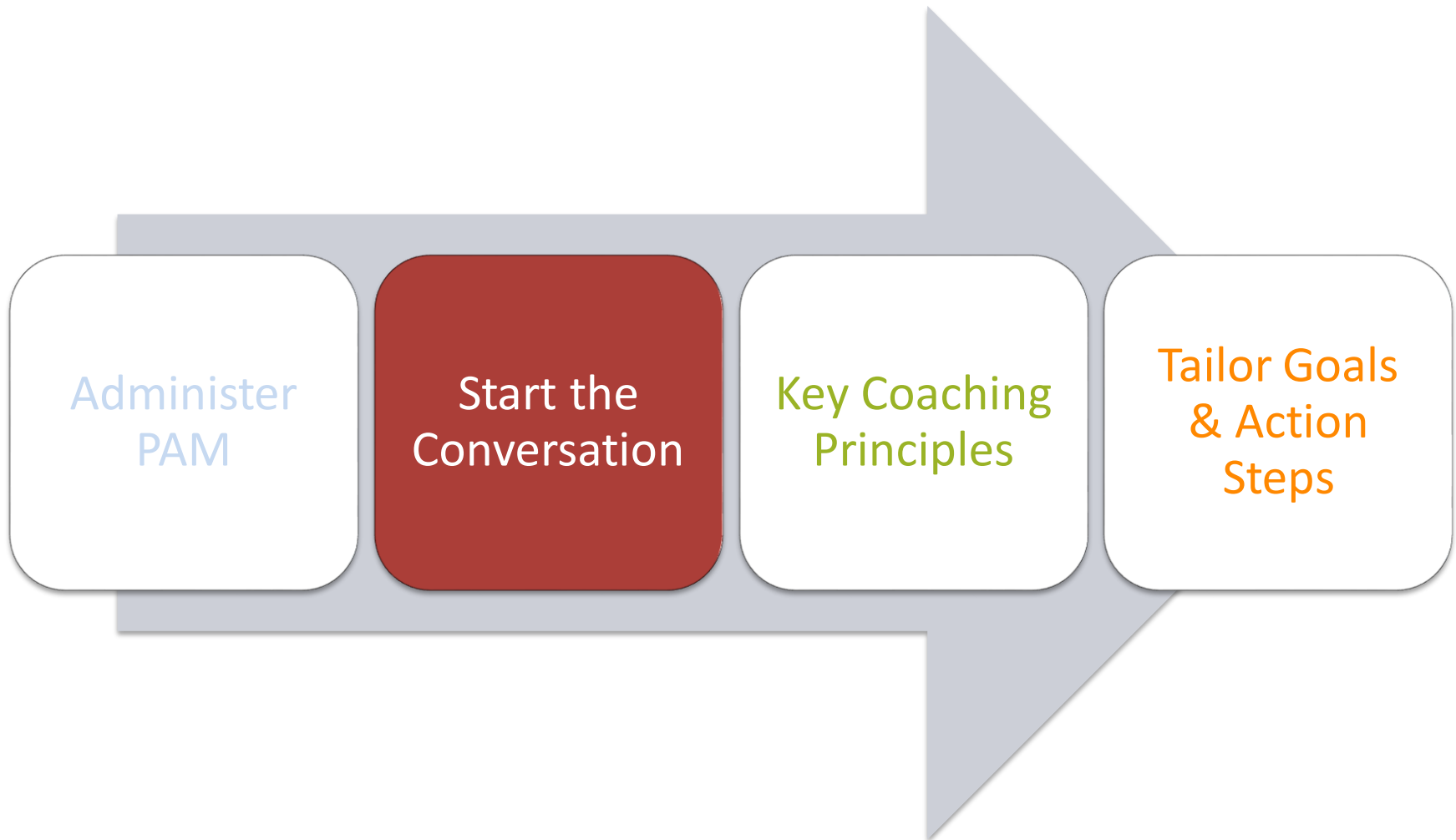
## **Issue:** Trying to please a coach or make a coach look good

- Introduction – there are no wrong or right answers. Just answer based upon what is true for you. How you respond will help us better support your health. How you answer will have no impact on me as your coach
- Have someone unknown to the person administer PAM
- Administer on paper without coach involvement

## **Issue:** Cognitive impairment (extremely low literacy, mental health diagnosis)

- Help to interpret questions, if, after reading a question two times, the person still cannot answer the question. See *administration primer* document for suggestions
- If unable to answer just a few questions (3 or less), can use n/a
- Turn to a caregiver if someone else is responsible for the person's health. Use the caregiver PAM

**\* Difficulty answering questions is not common**



## Interpret PAM responses

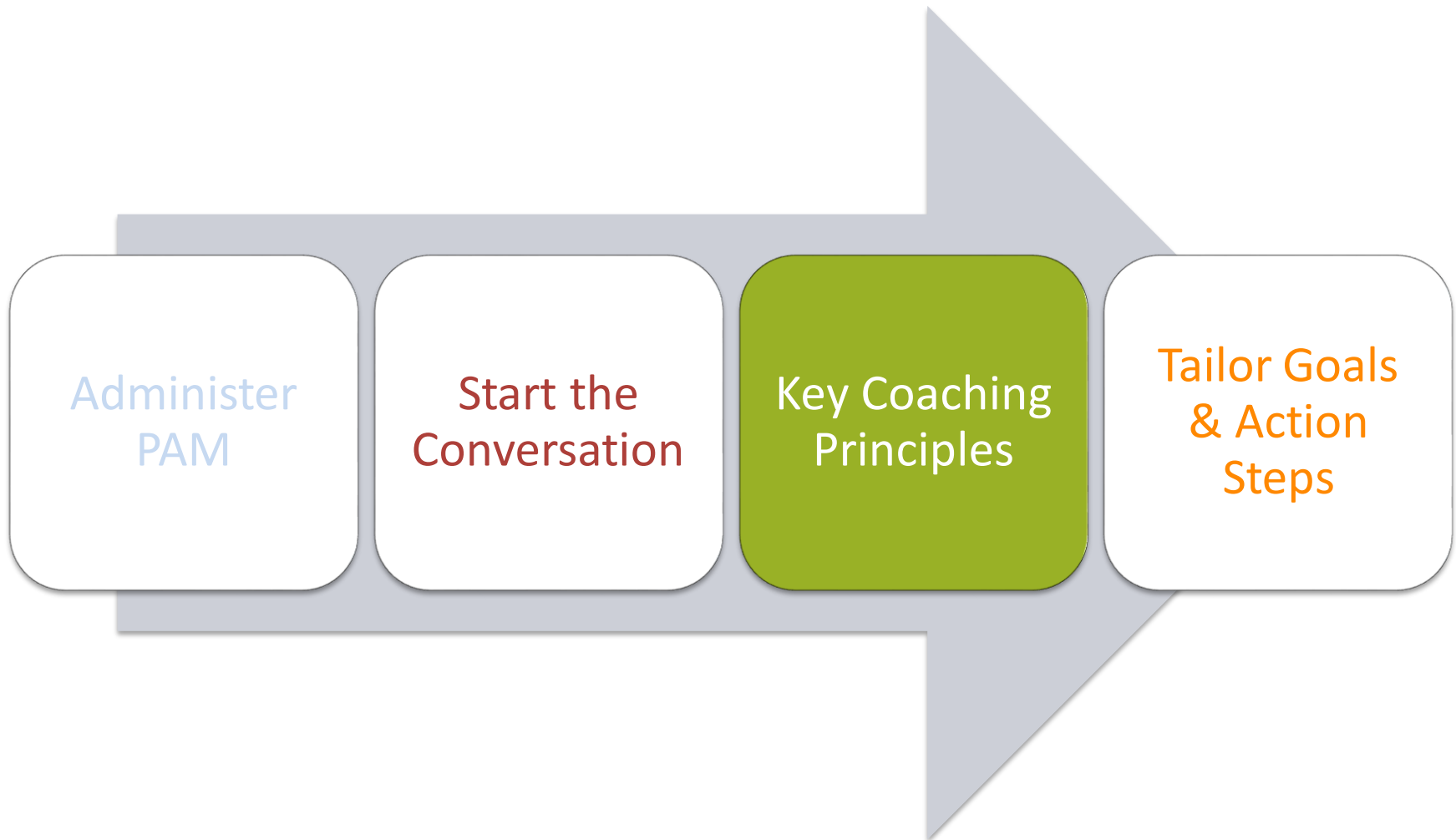
Individual Response	Interpretation
Agree strongly	Yes, the statement is <i>definitely</i> or <i>always</i> true about me.
Agree	<i>Sometimes</i> this is true about me or is <i>potentially</i> true about me.
Disagree/Disagree Strongly	This is not true for me.
NA	This does not apply to me. I do not know how to answer. I refuse to answer.

## Starting the conversation...

Identify key area of focus and perceived barriers

1. When all is said and done, I am the person who is responsible for taking care of my health	Disagree Strongly	Disagree	Agree	Agree Strongly	N/A
2. Taking an active role in my own health care is the most important thing that affects my health	Disagree Strongly	Disagree	Agree	Agree Strongly	N/A
3. I am confident I can help prevent or reduce problems associated with my health	Disagree Strongly	Disagree	Agree	Agree Strongly	N/A
4. I know what each of my prescribed medications do	Disagree Strongly	Disagree	Agree	Agree Strongly	N/A
5. I am confident that I can tell whether I need to go to the doctor or whether I can take care of a health problem myself.	Disagree Strongly	Disagree	Agree	Agree Strongly	N/A
6. I am confident that I can tell a doctor concerns I have even when he or she does not ask.	Disagree Strongly	Disagree	Agree	Agree Strongly	N/A









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Interaction is driven by the person

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person possesses answers and solutions within themselves

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Help person overcome any sense of being overwhelmed

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Help person engage in their health and become active

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Promote person's problem solving skills

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Promote positive belief in person's abilities and skills to be actively involved in their health

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Understanding a person's level of activation

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Active and reflective listening (listen for barriers)

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Spending more time asking than telling

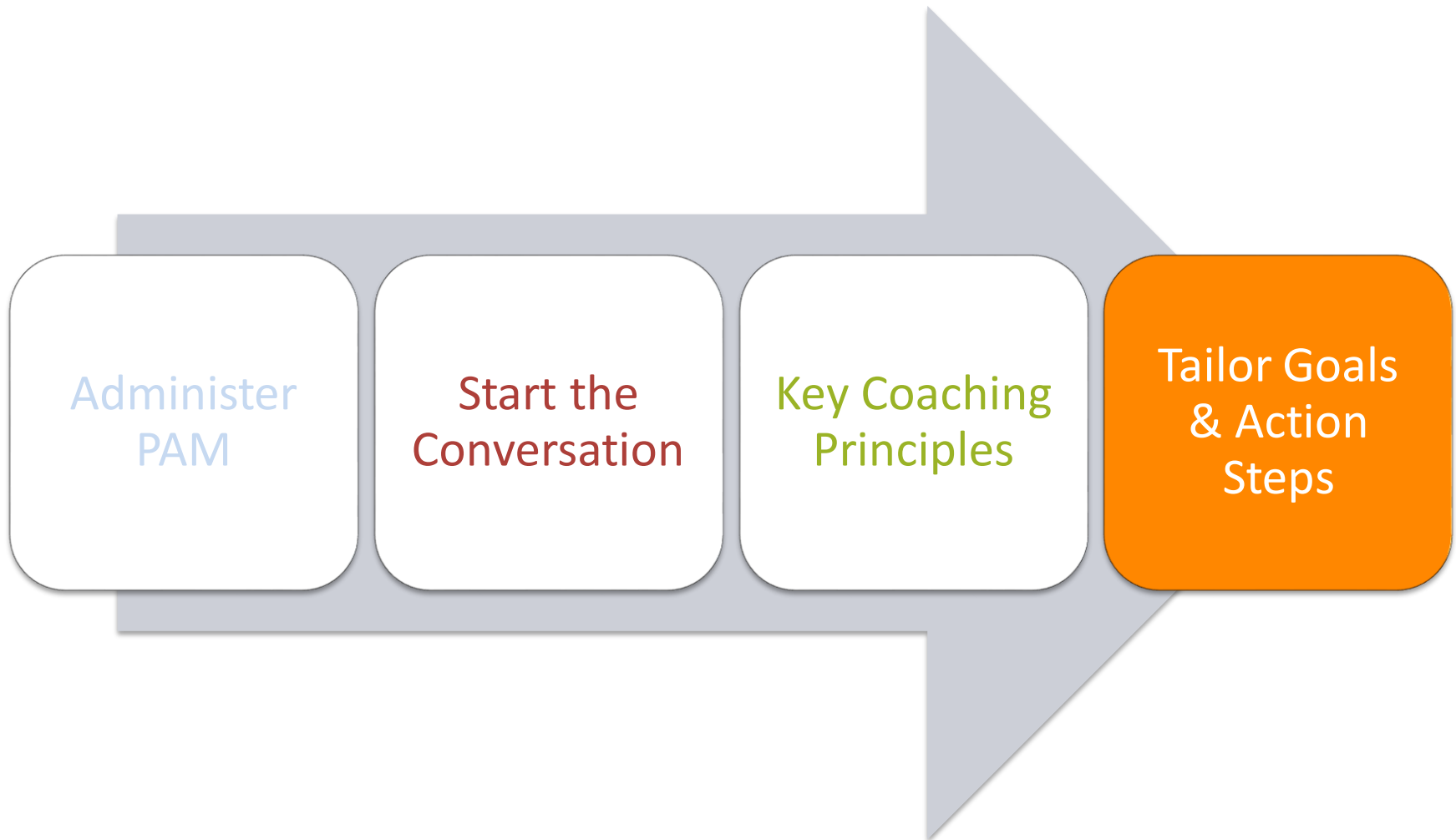
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Understanding & focusing on the person's agenda

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Guiding person's choices toward level appropriate and attainable goals & action steps

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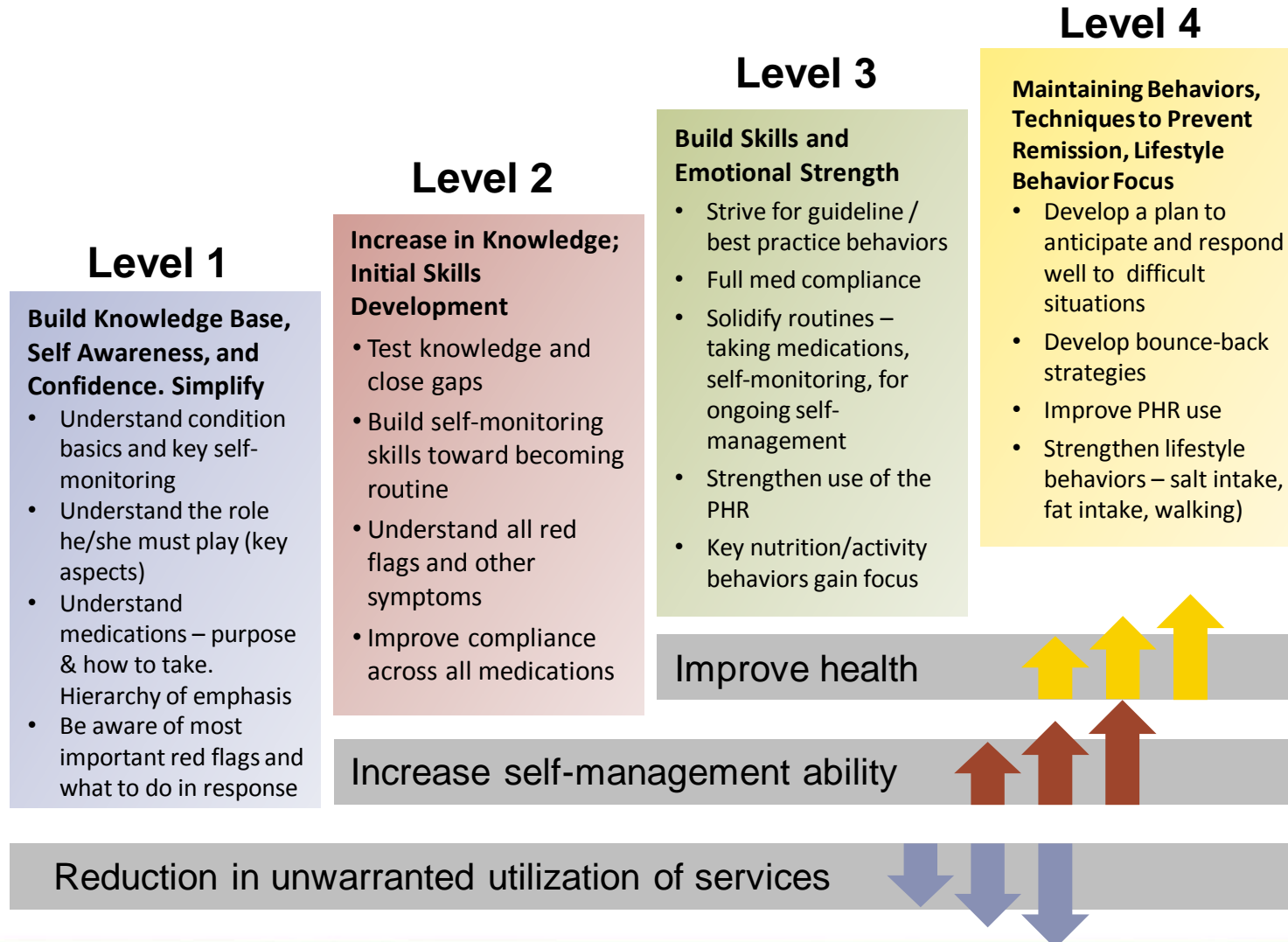


One size DOES NOT  
fit ALL!



**The cat made this look easy!**

# Tailoring goals by activation level





# Coaching for Activation<sup>®</sup> guides member coaching



**Coaching for Activation**  
BY INSIGNIA HEALTH

Diabetes | Asthma | COPD | CHF | CAD | Lifestyle | Hypertension | High Cholesterol

► Activation Level 1  
▼ Activation Level 2  
Condition & Symptoms  
Medication  
Diet & Nutrition  
Physical Activity  
Stress & Coping  
Smoking Cessation  
► Activation Level 3  
► Activation Level 4  
► Resource Library

**Diet & Nutrition - Level 2**

Select Level: 1 2 3 4

☒ Goal: Improve awareness around emotional eating triggers and start to develop healthier responses

**Possible Action Steps**

- Discuss the signs (eating in response to feeling bored, stressed, depressed, angry) of emotional eating and how to recognize these signs
- Keep track of emotional eating responses – what were you feeling and how did you respond?
- Try out some different responses – substituting healthy food choices (apple, celery, carrots, grapes) or non-food choices (gardening, going for a walk, calling or emailing a friend)

**Supporting Resources**

- How Can I Manage Stress?
- Weight Loss Help: How to Stop Emotional Eating
- Tips for Coping with Emotional Eating
- Tips for Coping with Emotional Eating
- Flourish Tax

**Tips for Coping with Emotional Eating** [Back](#)

This very brief document offers ideas around things to replace food when an emotional response triggers the urge to eat outside of meal times

Source: Joslin Diabetes Center  
Format: Web page  
Activation Level Suitability: All

English: [View](#) | [Email](#)

Home | Training | Terms of Use

Key areas of self-management

Goals and Action Steps are tailored to activation level

Resources reinforce coaching and can be easily printed or emailed

url: <http://cfa.insigniahealth.com>  
User Name: vidant1 (1-4)  
PW: Activation#1 (1-4)



# Coaching for Activation Structure



## Coaching for **Activation** BY INSIGNIA HEALTH

[Diabetes](#)[Asthma](#)[COPD](#)[CHF](#)[CAD](#)[Lifestyle](#)[Hypertension](#)[High Cholesterol](#)

### ▼ Activation Level 1

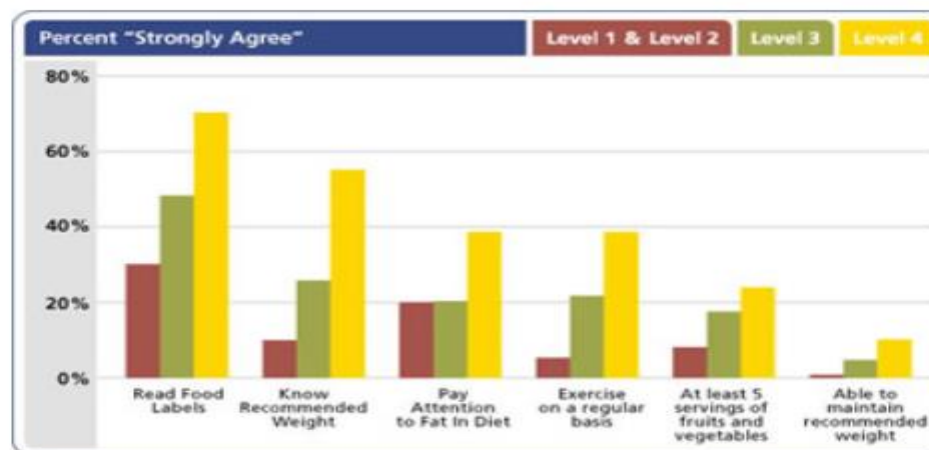
[Condition & Symptoms](#)[Medication](#)[Diet & Nutrition](#) →[Physical Activity](#)[Stress & Coping](#)[Smoking Cessation](#)[► Activation Level 2](#)[► Activation Level 3](#)[► Activation Level 4](#)[► Resource Library](#)

## CHF

[Print this Page](#)

For people to take a more active role in managing their health, they need to develop a foundation of knowledge and skills. By measuring activation levels, the coach has information on the individual and their current abilities. This information allows the coach to tailor action steps and support specifically to the individual's current needs. Taking action steps appropriate to the individual's level of activation gives them the opportunity to experience success and build confidence.

The chart below shows how activation level (*level 1 is the lowest level of activation*), tells you about individuals behavior, their self-management needs, and what they are capable of taking on.



Source: Peace Health Study N=397

Research has shown that individuals low in activation, lack basic knowledge, have developed few self-management skills and exhibit little confidence in their ability to manage their health. The *Coaching for Activation™* approach starts

# Resources in CfA- Third Party, Activation Level Appropriate



▶ Activation Level 1

▶ Activation Level 2

▼ Activation Level 3

Condition & Symptoms

Medication

Diet & Nutrition

Physical Activity

Stress & Coping

Smoking Cessation

▶ Activation Level 4

▶ Resource Library

## Physical Activity - Level 3

Select Level: [1](#) [2](#) [3](#) [4](#)

[Contract All](#) | [Expand All](#) | [Print this Page](#)

### Food & Activity Tracker

[Back](#)

This online resource allows you to identify and track your daily food intake and activity level, compare it to your desired calorie consumption and burn to see how you're doing each day and over time.

Free resource.

**Source:** USDA

**Format:** Online tracking tool

**Activation Level Suitability:** 2-4

**English:** [View](#) | [Email](#)

### National Multiple Sclerosis Society Events

[Back](#)

**Bike MS:** With 100 unique rides across the nation, you can find the ride that's right for you.

**Walk MS:** Joining the movement with hundreds of thousands of people across the country is an experience like no other. Walk together to make a powerful statement and keep moving toward a cure.

# CareMaps™ provide high level coaching guidance



## ACTIVATION LEVEL BASED COACHING GUIDE PAM LEVEL 1

DESCRIPTION OF TYPICAL PATIENT	OVERARCHING COACHING GOALS
<ul style="list-style-type: none"> <li>❖ May not understand that they need to play a role in their own health</li> <li>❖ Lacks basic knowledge about their condition</li> <li>❖ May not understand treatment options, or self-care expectations</li> <li>❖ May not feel in charge of own health and healthcare</li> <li>❖ Use to failure</li> <li>❖ Feels very overwhelmed with regard to self-care and healthcare.</li> <li>❖ Experiences a lot of negative emotion that makes it hard to cope</li> <li>❖ Poor problem solving skills</li> <li>❖ Low confidence in their ability to impact their health</li> <li>❖ Difficulty following through on treatment regimens</li> <li>❖ Has trouble connecting behavior to health</li> <li>❖ 30%-40% Rx adherent; High rate of ER use/hospitalization</li> </ul> <div data-bbox="343 704 859 763" style="border: 1px solid black; padding: 5px; text-align: center;"> <p><i>"My doctor takes care of me."</i> <i>"I don't understand the cause"</i></p> </div>	<ul style="list-style-type: none"> <li>❖ Build confidence through small step goals that they can make a difference in their health and how they feel</li> <li>❖ Overcome feelings of being overwhelmed by giving permission to take it one step at a time. Don't overwhelm with too much information</li> <li>❖ Increase self-awareness by connecting his/her behaviors to their health, and how he/she feels</li> <li>❖ Help member see that through their own actions they can have a positive impact on their health</li> <li>❖ Focus on current (not long-term) health issues</li> <li>❖ Use positive messages, avoid disagreements, and show empathy</li> <li>❖ Don't "jump the gun" asking them to do behaviors beyond their level</li> <li>❖ Begin to problem solve around small issues to overcome barriers to behavioral change.</li> <li>❖ Let the individual choose the area to work on, and then guide toward appropriate goals/steps</li> </ul>
SPECIFIC GOALS & RELATED ACTION STEP OPTIONS TO CONSIDER	SPECIFIC GOALS & RELATED ACTION STEPS OPTIONS TO CONSIDER
<p><b>Condition Knowledge &amp; Symptom Awareness (example goals &amp; steps)</b></p> <ul style="list-style-type: none"> <li>❖ Build skill in problem solving around managing symptoms <i>Step:</i> Write down symptoms, how they felt, and what might have triggered the symptoms. Discuss findings w/member of health care team</li> <li>❖ Build basic knowledge about condition <i>Step:</i> Explain what their condition is in one or two simple sentences</li> <li>❖ Learn important targets/numbers related to their health condition <i>Step:</i> Be able to explain their numbers and where they fall</li> </ul> <p><b>Medications (example goals &amp; steps)</b></p> <ul style="list-style-type: none"> <li>❖ Learn how medications work, their risks, benefits, and side effects. <i>Step:</i> Identify concerns and knowledge gaps related to medications and dose these gaps</li> <li>❖ Identify barriers to taking meds and problem solve together <i>Step:</i> Observe for a week when and how medications are taken. Spot missed days/doses and what might have gotten in the way</li> <li>❖ Begin to work toward taking medications as part of daily routine <i>Step:</i> Together, fill out a medication chart that includes all prescribed and over-the-counter medications + dosing directions</li> </ul>	<p><b>Diet &amp; Nutrition (example goals &amp; steps)</b></p> <ul style="list-style-type: none"> <li>❖ Pay attention to the habits &amp; stressors that promote poor diet, identify an opportunity to improve, and try it out <i>Step:</i> Keep track of the food that is eaten for at least a few days in the coming week. What is eaten and how much? Try taking pics with a phone camera. Are there triggers that lead to certain food behaviors?</li> <li>❖ Develop basic knowledge of 'good' and 'bad' foods. Understand the characteristics of each. Reflect on portion sizes and how full he/she feels after meals <i>Step:</i> Make a small diet "upgrade" in the next week – replace high calorie/fat snack w/ fruits/veggies; go LF or NF with some foods; reduce portion size, try a new fruit/veggie rich in color</li> </ul> <p><b>Physical activity (example goals &amp; steps)</b></p> <ul style="list-style-type: none"> <li>❖ Start to develop an understanding of the specific benefits of physical activity. <i>Step:</i> Keep track of the types and amounts of activity he/she gets in a day, and how it makes them feel. Discover where there may be some opportunities to fit in more activity, and try adding a few extra minutes to something that they already do</li> </ul>





## Appropriate Coaching Goals: Level 1

Build basic  
knowledge

Promote basic  
self-awareness

Start to grow  
confidence

### Setting the stage:

Carlos is a middle-aged diabetic patient who has been given a list of things to do by his physician such as monitor blood glucose three times a day, check his feet, take medication as directed, increase exercise and make changes to his diet. He feels very overwhelmed and discouraged when thinking about all that needs to be done to better manage his diabetes.

His diabetes is not under good control. He doesn't know where to start or how to make any progress and ends up shutting down and ignoring the problem.





## Appropriate Coaching Goals: Level 1

Build basic knowledge

Promote basic self-awareness

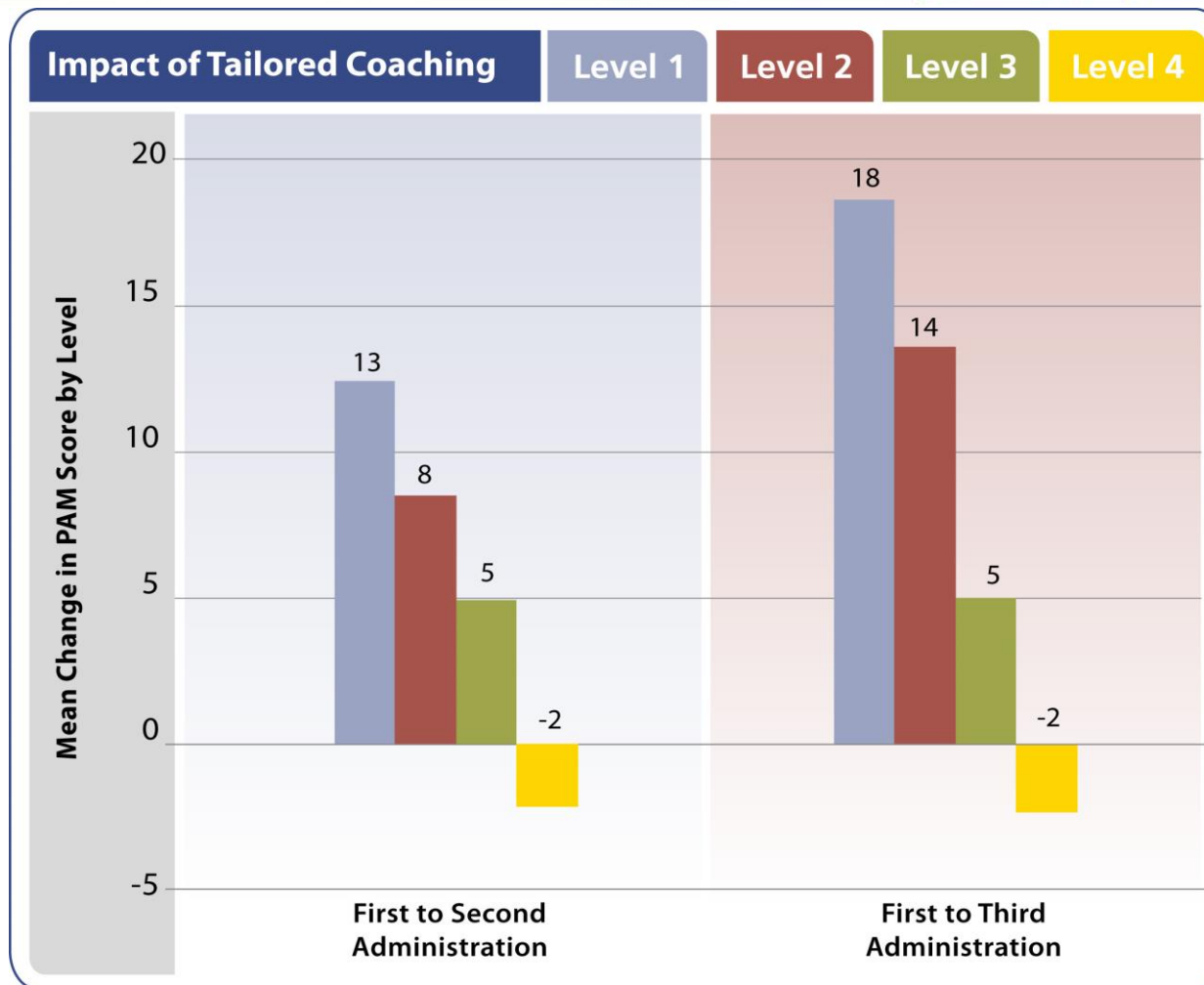
Start to grow confidence

### Possible Appropriate Action Steps for Carlos:

- Work with Carlos to help him understand the basics of diabetes and explain what it is in one or two sentences.
- Together, review key diabetes words and terms (high blood glucose, hypoglycemia, carbohydrate, know your blood glucose numbers, blood pressure, heart disease, etc.).
- Discuss health problems and unpleasant symptoms he may be experiencing, connecting them to his diabetes.
- Discuss buying a blood glucose monitor and how it is used.
- Discuss lifestyle/behavior risks for diabetes.



Gains from tailored coaching are consistently greatest from the low activated



Source: Improving the Outcomes of Disease Management by Tailoring Care to the Patient's Level of Activation. The American Journal of Managed Care, June 2009.

# A single point change in PAM score is meaningful



In a rigorous study, PAM demonstrated its ability to predict utilization and outcomes two years into the future

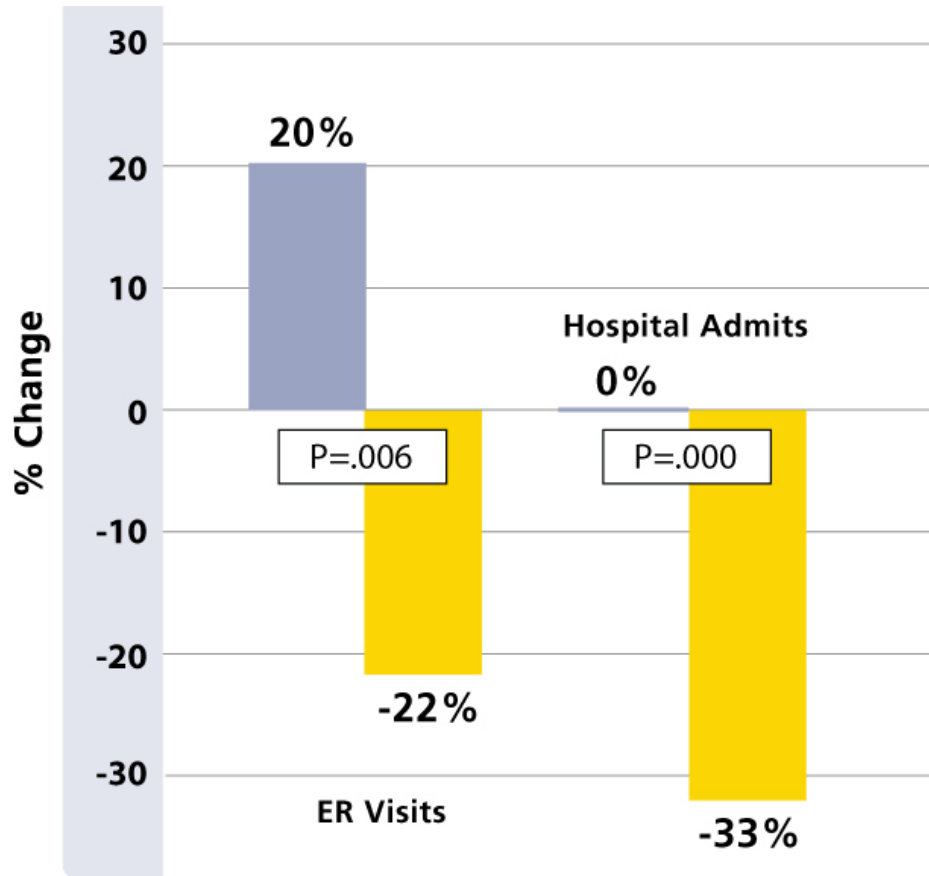
	% change for a 1 point change in PAM score	10 point gain impact 54 (L2) to 64 (L3)
Hospitalization	1.7% decline	17% decreased likelihood of hospitalization
Good A1c control (HgA1c<8%)	1.8% gain	18% greater likelihood of good glycemic control
A1c testing LDL-c testing	3.4% gain	34% improvement in testing

Source: Is Patient Activation Associated with Future Health Outcomes and Healthcare Utilization Among Patients with Diabetes? Journal of Ambulatory Care Management, Oct/Dec 2009.

# Coaching tailored to levels has demonstrated positive impact



## Change in Key Utilization Metrics Over 6 Months



Hibbard, J, Green, J, Tusler, M. Improving the Outcomes of Disease Management by Tailoring Care to the Patient's Level of Activation. The American Journal of Managed Care, V.15, 6. June 2009

## Clinical Indicators\*

**Medications:** intervention group increased adherence to recommended immunizations and drug regimens to a greater degree than the control group. This included getting influenza vaccine.

**Blood Pressure:** Intervention group had a significantly greater drop in diastolic as compared to control group.

**LDL:** Intervention group had a significantly greater reduction in LDL, as compared to the control group.



## 4 Online Learning Modules



1. Copy and paste into your web browser:  
<https://training.insigniahealth.com/login.aspx>

2. Use one of the following username and password combinations:

Username: **Vidant13**  
Password: **vidant2**

Username: **VidantHealth**  
Password: **vidant3**

Username: **VidantNC**  
Password: **vidant4**

**Easy online, 24/7 access**  
**About 20 minutes to complete each module**  
**Each course builds off the next**

- **PAM 101**
- **Personas**
- **Administration**
- **Coaching for Activation**



# Thank you!

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