

Patients as Care Team Members

# CASE STUDY

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**NATIONAL  
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a PHMC affiliate



## Patients as Care Team Members

Evidenced-based research demonstrates that **patient engagement leads to improved health outcomes and quality of life**. To effectively engage patients in their healthcare, health centers can utilize a team-based approach to develop a shared care plan and support patients as they navigate the healthcare system. In a team-based setting, all roles are optimized, understood, and respected. Yet often, the patient is inadvertently left out of the clinical care team composition, limiting their agency over the care they receive. In a fully-integrated care team, the patient is at the center of the care experience, and can:

1. Provide information about their own health and experience
2. Describe and report changes in health status
3. Share response to self-care and treatments
4. Identify factors that help and hinder engagement and the achievement of health goals

By empowering patients to be members of the care team, health center providers and staff can **improve clinical outcomes** and the **patient experience**. In the winter and spring of 2019, the **Migrant Clinicians Network (MCN)** and the **National Nurse-Led Care Consortium (NNCC)** hosted a learning collaborative exploring strategies for patient engagement in a health center setting. Throughout MCN and NNCC's learning collaborative, health center participants discussed two specific tools that can engage patients as members of their own care teams: the Agency for Healthcare Research and Quality (AHRQ) **Be Prepared to Be Engaged** tool and **Motivational Interviewing**.

## Case Study

It is always a pleasure to see Mrs. Hernandez at City Health Center. She seems to know every patient in the waiting room, strikes up easy conversations with the front desk, and eagerly tells her provider and nurse about the latest developments with her young grandchildren. Yet whenever nurse practitioner Mr. Jones brings up managing Mrs. Hernandez's type II diabetes during their appointments, Mrs. Hernandez seems to disengage from conversation, nodding when instructions are given and leaving the office without asking follow-up questions. Mrs. Hernandez's A1C levels have not improved since her diagnosis four years ago. Mr. Jones has a full complement of patients on his panel, so it is difficult to spend extra time with Mrs. Hernandez to discuss her treatment in great detail. She is exploring strategies to engage Mrs. Hernandez as a full participant in her diabetes management.

## Be Prepared to Be Engaged

In an effort to improve patient quality and safety in primary care, AHRQ staff have developed a number of tools for clinical use to promote patient engagement. One such tool is the **Be Prepared to Be Engaged** toolkit, which incorporates agenda-setting, shared care planning, and open dialogue as key elements of the patient encounter. The toolkit includes materials for patients to list their concerns and goals to be discussed during primary care visits. It encourages providers and patients to work together to set achievable healthcare goals.

## Case Study Check-In

To help address type II diabetes management among patients like Mrs. Hernandez, her nurse practitioner Mr. Jones suggests adopting the **Be Prepared to Be Engaged** tool to empower patients to fully participate in their visits to City Health Center. When Mrs. Hernandez arrives in the waiting room, a front desk staff member gives her a “Patient Prep Card,” which includes space for Mrs. Hernandez to list her questions and health goals, as well as what she’d like to talk about during her visit. Mrs. Hernandez spends her time in the waiting room setting an agenda for her appointment with Mr. Jones.

Through Be Prepared to Be Engaged, patients can work with their providers to outline expectations and set meaningful goals for their own care. According to **AHRQ**, “The goal is to help them join their own healthcare team—to be *ready* for the appointment, to *speak up*, to *ask questions*, to *take notes*” [original emphasis]. But how can Mr. Jones set the stage for Mrs. Hernandez to feel comfortable engaging in her healthcare experience?

## Motivational Interviewing

Motivational interviewing (MI) is a conversational strategy that emphasizes listening to and reflecting back the perspectives of others (in this case, patients) to facilitate goal-setting. **Hettema, Steele, and Miller** define MI as “a client-centered, directive therapeutic style to enhance readiness for change by helping clients explore and resolve ambivalence”. While MI was initially developed for use by behavioral health practitioners to address substance use disorder, the technique can be utilized to great effect by primary care providers. **Evidence suggests** that MI is particularly effective in primary care settings to address chronic conditions like diabetes. Health center staff can incorporate MI into their treatment approach for patients whose plans of care involve making behavior change(s).

There are four general processes involved in MI: engaging, focusing, evoking, and planning. Through each of these four processes, practitioners invite the patient to discuss their care, set an agenda based on the patient’s expressed goals, elicit the patient’s motivation for change, and develop a concrete plan to achieve success. The purpose of MI is not to prescribe pre-determined actions for the patient, but to explore ways in which ideal clinical outcomes connect with a patient’s desire and willingness to change based on their preferences.

## Case Study Check-In

During Mrs. Hernandez's appointment, her nurse practitioner Mr. Jones asks if they can review the **Be Prepared to Be Engaged** tool together. Mrs. Hernandez has written "grandkids" in the agenda section of the Patient Prep Card. Mr. Jones thanks Mrs. Hernandez for taking the time to complete the prep card and uses the information provided to engage Mrs. Hernandez in a conversation about her care.

"I see that you'd like to talk about your grandkids today. Can you tell me why you wrote that on the card?" Mr. Jones asks. She notices that Mrs. Hernandez immediately becomes more attentive when her grandchildren are mentioned.

"I just can't keep up with them," she says. "I get winded so easily. I'm out of breath by the time we've walked down the front stairs."

Mr. Jones reflects on Mrs. Hernandez's answer. "It sounds like you really love spending time with your grandkids, and it's frustrating when you don't feel like you can fully engage with them."

"That's right – it makes me feel like I'm not a good grandmother."

Mr. Jones takes a moment to reframe Mrs. Hernandez's self-critique. "The fact that you want to discuss your grandkids today suggests to me that you care about them very much. That sounds like someone who is a wonderful grandmother. What I'm hearing is that you may not feel physically able to be as active with them as you'd like. Can we talk about that?"

"Sure," Mrs. Hernandez agrees. She then adds, "I didn't realize this was something I could talk about here."

"Of course. I'm here as a resource for you, Mrs. Hernandez. Let's work together to achieve your goals."

By using **open-ended questions, affirmations, reflections, and summaries (OARS)** as an MI strategy, Mr. Jones has uncovered a potential motivation for change that can propel Mrs. Hernandez's treatment forward. Mrs. Hernandez now seems more open to communicating about her diagnosis – a great first step in achieving real progress both clinically and personally.

## Summary

Patients are central to clinical success. They are experts in their own healthcare experience, and can provide meaningful context to help providers and staff create person-centered treatment plans. Providers can engage patients through a variety of strategies and tools, including **Be Prepared to Be Engaged** and **Motivational Interviewing**. By cultivating patients as team members in primary care, health centers can improve the patient experience, clinical outcomes, and provider satisfaction.

## NNCC and Partners

- National Nurse-Led Care Consortium: <https://nurseledcare.org>
- Migrant Clinicians Network: <https://www.migrantclinician.org>
- Agency for Healthcare Research and Quality: <https://www.ahrq.gov>

## References

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## Notes

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