

Lesson 2: Engaging and Activating Patients/Caregivers

The principle: Let's get engaged.

The communication behavior: Patient activation; perspective taking

Why the behaviors matter: Patients actively involved in their care have better clinical outcomes & better perceptions of the care they receive.

The behaviors:

- **Help patients progress through common activation stages:**
 - Stage 0:** The patient doesn't believe taking an active role in their care is important
Your key actions to progress patient to next stage: Show & tell importance
 - Stage 1:** Patient believes taking an active role in their care is important
Actions to move to next stage: Provide content & process knowledge; boost confidence
 - Stage 2:** Patient has the knowledge & confidence necessary for action
To move to next stage: Encourage action w/ acknowledgment & praise
 - Stage 3:** Patient takes action to improve their health
Actions to move to next stage: Reinforce action w/ acknowledgment & praise
 - Stage 4:** Patient stays the course under stress
Actions to maintain stage: Provide emotional (and clinical) support
- **Find their perspective to engage and activate**
 - Hear declarative statements
 - Observe indicators
 - Requests for treatment, desire to speak, emotions, confusion/uncertainty, expressions of concern, pleas for reassurance
- **Connect with their perspective (3 Cs) to engage and activate**
 - Confirm perspective
 - Check alignment
 - Connect your communication with their perspective

Implementing the behaviors:

- Use the ideas from this lesson to encourage and increase conversational engagement from a patient and to advance the patient's activation level from one stage to the next. Record what happens on this lesson's reflection sheet.
- Stretch goal: Try to get every patient you interact with this week to ask you a question about their care (Hint: Try using clearinghouse questions from lesson 1).

Source for patient activation stages: Hibbard, Mahoney, Stockard, & Tusler, (2005) *Health Services Research* 40(6 pt1), 1918–1930.

For more information:

Read Chapters 1 and 2 of *Stop Talking, Start Communicating*.



Lesson 2 Exercise: Engaging and Activating Patients/Caregivers

Instructions for the Care Provider

Directions: You will be the care provider in one of two patient-provider interaction scenarios. The focus of this exercise is for you (the care provider) to effectively engage the patient in his/her care and to connect your communication to the patient's perspective. Please prepare for the interaction based on the ideas from this lesson and your experience in similar situations. Please be prepared to share your feedback following the exercise. The observer's feedback sheet appears below for your reference.

Scenario 1: A patient is suffering from shortness of breath with exertion and fatigue. The patient has also been newly diagnosed with congestive heart failure. The patient is about to meet with you to discuss his/her care, and you want to encourage the patient to take an active role in his/her care.

Scenario 2: You are about to give an IV to a patient who you notice is visibly nervous and anxious. You want to tactfully figure out why the patient is nervous, so you can relax the patient before drawing blood.

Engaging and Activating Patients Observer Worksheet

How well did the care provider listen to the patient, encourage the patient to participate in his/her healthcare, and tell the patient about the importance of taking an active role?

How effectively did the care provider provide content & process knowledge? Bolster the patient's confidence?

How effectively did the care provider encourage and reinforce action with acknowledgment & praise?

How effectively did the care provider connect his/her message to the patient's perspective?

How could the care provider encourage more patient activation/engagement?



Lesson 2 Exercise: Engaging and Activating Patients/Caregivers

Instructions for the Patient

Directions: You will be the patient in one of two patient-provider interaction scenarios. The focus of this exercise is for the care provider to effectively engage the patient (you) in your care and to connect his/her your communication to your perspective. Please prepare for the interaction based on the ideas from this lesson and your experience in similar situations. Please be prepared to share your feedback following the exercise. The observer's feedback sheet appears below for your reference.

Scenario 1: You are a patient suffering from shortness of breath with exertion and fatigue. You have also been newly diagnosed with congestive heart failure. You believe that taking an active role in your healthcare is important, but you don't feel like you have all of the information you need or all the internal confidence necessary to take action (i.e. you are in the first stage of patient activation). As a result, you haven't yet taken any action to improve your health outcomes. You are about to meet with a nurse at the hospital.

Scenario 2: You are very anxious about the IV you are about to receive due to your previous experiences with healthcare providers struggling to find your veins. You are tactfully looking for reassurance that the nurse knows what he/she's doing, and you want to receive that reassurance before you'll really be able to relax. Note: Please don't immediately disclose the reason for your anxiousness. Make the nurse extract the reason for your agitation by asking you questions and/or giving you a chance to explain yourself.

Engaging and Activating Patients Observer Worksheet

How well did the care provider listen to the patient, encourage the patient to participate in his/her healthcare, and tell the patient about the importance of taking an active role?

How effectively did the care provider provide content & process knowledge? Bolster the patient's confidence?

How effectively did the care provider encourage and reinforce action with acknowledgment & praise?

How effectively did the care provider connect his/her message to the patient's perspective?

How could the care provider encourage more patient activation/engagement?



Lesson 2 Exercise: Engaging and Activating Patients/Caregivers

Instructions for the Observer

Directions: You will be observing one of two patient-provider interaction scenarios. The purpose of this exercise is for the care provider to increase the patient's activation/engagement in their healthcare and for the care provider to connect their message to the patient's perspective. Please read the scenarios, observe the interaction, and complete the worksheet below. Please be prepared to share your feedback with the care provider and the patient following the exercise.

Scenario 1: A patient is suffering from shortness of breath with exertion and fatigue. The patient has also been newly diagnosed with congestive heart failure. The patient believes that taking an active role in his/her healthcare is important, but the patient doesn't believe he/she has all of the information needed and all of internal confidence necessary to take action (i.e. the patient is in the first stage of activation). Consequently, the patient hasn't yet taken any action to improve his/her health outcomes. The patient is about to meet with a care provider.

Scenario 2: A patient is very anxious about the IV he/she is about to get due to previous experiences with healthcare providers struggling to find veins. The patient is tactfully looking for reassurance that the care provider knows what he/she's doing, and the patient wants to receive that reassurance before really being able to relax.

Engaging and Activating Patients Observer Worksheet

How well did the care provider listen to the patient, encourage the patient to participate in his/her healthcare, and tell the patient about the importance of taking an active role?

How effectively did the care provider provide content & process knowledge? Bolster the patient's confidence?

How effectively did the care provider reinforce action with acknowledgment & praise?

How effectively did the care provider connect his/her message to the patient's perspective?

How could the care provider encourage more patient activation/engagement?



Reflection Sheet

Name:

Lesson:

Briefly describe the idea you implemented (what idea, when, & with whom):

What happened?

What did you learn?

What will you do in a similar situation next time?

Date & time of supervisor review:

Length of supervisor-employee discussion (in minutes):

Employee signature:

Supervisor signature: