

Patient Activation Assessment Guidelines

Purpose:

The Patient Activation Assessment® or PAA®, provides Transitions Coaches ® with a method of tracking patients' progress in skill transfer and activation along the Four Pillars® during their participation in the Care Transitions Intervention®. This tool provides Transitions Coach's will real-time feedback on which of the Four Pillars may need to be emphasized or reinforced during the course of the home visit and the follow up phone calls. The PAA provides supervisors of Transitions Coaches with quantitative data on the value they bring to patient encounters.

Process:

The first administration of the PAA serves as a baseline measure of the patient's activation before having received any coaching. This could either be in the hospital, the skilled nursing facility, or at the beginning of the first home visit. Then at each the subsequent encounter (home visit, three phone calls) progress across the Four Pillars is ascertained. The final PAA forms the basis for an overall determination of activation. If the patient and family caregiver are functioning in tandem, consider the PAA as measuring their activation as a "unit."

Timing:

Separate evaluations are to be completed by the coach:

- After the home visit
- After each telephone contact
- At the end of the 30-day relationship
- The evaluations are tracked on the Patient Activation Assessment form

Medication Management	Baseline	Final
▪ Demonstrates effective and reliable method of medication management (this could be of their own design or one suggested by the Transitions Coach such as a weekly medication organizer)	If <u>prior to coaching</u> the patient and family caregiver already have a method in place that works for them, score a 1. If no method exists, or the approach in place is not working for them, score a 0.	If <u>during or after completing coaching</u> the patient and family caregiver have a system in place that works for them, score a 1. If no system exists, or the method in place is not working for them, score a 0.
▪ For each medication, the patient understands the purpose, when and how to take, and possible side effects	If <u>prior to doing any coaching</u> , the patient and family caregiver <u>already</u> demonstrate a working knowledge of every or nearly every medication, score a 1. If not, score a 0.	If <u>during or after completing coaching</u> , the patient and family caregiver demonstrate a working knowledge of every or nearly every medication, score a 1. If not, score a 0.
▪ Demonstrates ability to accurately update medication list	If <u>prior to coaching</u> the patient and family caregiver <u>already</u> update a medication list, score a 1. If not, score a 0.	If <u>during or after completing coaching</u> , the patient and family caregiver <u>already</u> update a medication list, score a 1. If not, score a 0.

<ul style="list-style-type: none"> Agrees to share medication list with PCP and/or specialist 	<p>If <u>prior to coaching</u> the patient and family caregiver <u>already</u> take their medication list to appointments and confirm it with physician(s), score a 1 If not, score a 0.</p>	<p>If <u>during or after completing coaching</u>, the patient and family caregiver take their medication list to appointments and confirm it with physician(s), score a 1 If not, score a 0.</p>
Red Flags	Baseline	Final
<ul style="list-style-type: none"> Demonstrates understanding of Red Flags, or warning signs that condition may be worsening 	<p>If <u>prior to doing any coaching</u> the patient and family caregiver can <u>already</u> articulate what key Red Flags to watch for score a 1. If not, score a 0.</p>	<p>If <u>during or after completing coaching</u> the patient and family caregiver can articulate what key Red Flags to watch for score a 1. If not, score a 0.</p>
<ul style="list-style-type: none"> Can articulate how to respond to Red Flags 	<p>If <u>prior to coaching</u> the patient and family caregiver <u>already</u> can articulate or demonstrate they know how to appropriately respond to Red Flags, score a 1. If not, score a 0.</p>	<p>If <u>during or after completing coaching</u>, the patient and family caregiver can articulate or demonstrate they know how to appropriately respond to Red Flags, score a 1. If not, score a 0.</p>
Medical Care Follow Up	Baseline	Final
<ul style="list-style-type: none"> Can schedule and attend a follow up appointment(s) 	<p>If <u>prior to coaching</u> the patient and family caregiver <u>already</u> can demonstrate that they can schedule and follow-through with appointments or has already done so, score a 1. If not, score a 0.</p>	<p>If <u>during or after completing coaching</u>, the patient and family caregiver can demonstrate that they can schedule and follow-through with appointments score a 1. If not, score a 0.</p>
<ul style="list-style-type: none"> Writes a list of questions for PCP and/or specialist and brings to appointment 	<p>If <u>prior to coaching</u> the patient and family caregiver <u>already</u> develop a list of questions for providers and took them to appointments, score a 1. If not, score a 0.</p>	<p>If <u>prior to coaching</u> the patient and family caregiver developed a list of questions for providers and took them to appointments, score a 1. If not, score a 0.</p>
Personal Health Record (PHR)	Baseline	Final
<ul style="list-style-type: none"> Understands the purpose of the PHR and the importance of updating PHR 	<p>If <u>prior to coaching</u> the patient and family caregiver <u>already</u> has a PHR in some form that is kept current, score a 1 If not, score a 0.</p>	<p>If <u>during or after completing coaching</u>, the patient and family caregiver has a PHR that is kept current, score a 1 If not, score a 0.</p>
<ul style="list-style-type: none"> Agrees to bring PHR to every health care encounter 	<p>If <u>prior to coaching</u> the patient and family caregiver <u>already</u> bring a PHR to every health encounter, score a 1. If not, score a 0.</p>	<p>If <u>during or after completing coaching</u>, the patient and family caregiver bring a PHR to every health encounter, score a 1. If not, score a 0.</p>