



# Utilizing Patient-Centered Technologies to Support Care Transitions

U.S. DEPARTMENT OF HEALTH AND HUMAN SERVICES, ADMINISTRATION ON AGING, WASHINGTON DC 20201  
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# Agenda

- Background on Center for Technology and Aging (CTA) and Tech4Impact Grant Program
- Role of health technologies in reducing hospitalizations and promoting better care, better health, lower costs
- Presentations from two Tech4Impact Grantees

# Presenters

- Lynn Redington, Senior Program Director, Center for Technology and Aging
- Stephen Kogut, Associate Professor of Pharmacy Practice, University of Rhode Island College of Pharma
- Maria Gil, Co-founder, ER-Card, LLC
- Angie Hochhalter, Assistant Professor and Research Scientist II, Department of Internal Medicine at Scott & White Healthcare and Texas A&M Health Science Center (TAMHSC) College of Medicine.



# Technologies for Improving Post-Acute Care Transitions (“Tech4Impact”)

Lynn Redington, DrPH, MBA  
Senior Program Director  
Center for Technology and Aging  
June 21, 2011 Webinar



# About the Center for Technology and Aging

- Established in 2009 with funding from The SCAN Foundation, located at the Public Health Institute
- Mission: Expand use of technologies that help older adults lead healthier lives & maintain independence
- Independent, non-profit resource center on issues related to diffusion of technology for older adults
- Design, develop Technology Diffusion Grants Programs, e.g., Tech4Impact

# CTA Diffusion Grants Programs

Demonstrate/evaluate how technologies can:

- Improve *efficiency* of care delivery
- Improve *health* and independence
- Reduce the *cost* and burden of care
- Improve chronic disease *self-management*

Emphasis on *accelerating adoption/diffusion of patient-centered technologies*

# Tech4Impact Grant--The Need

- Avoidable Readmissions:
  - 1 in 5 patients readmitted w/in 30 days of discharge
  - 76% of readmissions are preventable
  - A \$25 billion savings potential
- Need to improve care transitions
  - Better care coordination, outreach, patient engagement and support
  - Information and communications technologies

*References:*

New England Journal of Medicine, Jencks S, et al "Rehospitalizations among patients in the Medicare fee-for-service program" *N England Journal of Medicine* 2009; 360: 1418-28.

PricewaterhouseCoopers, 2008. The price of excess: Identifying waste in healthcare spending.

# Tech4Impact Diffusion Grants Program

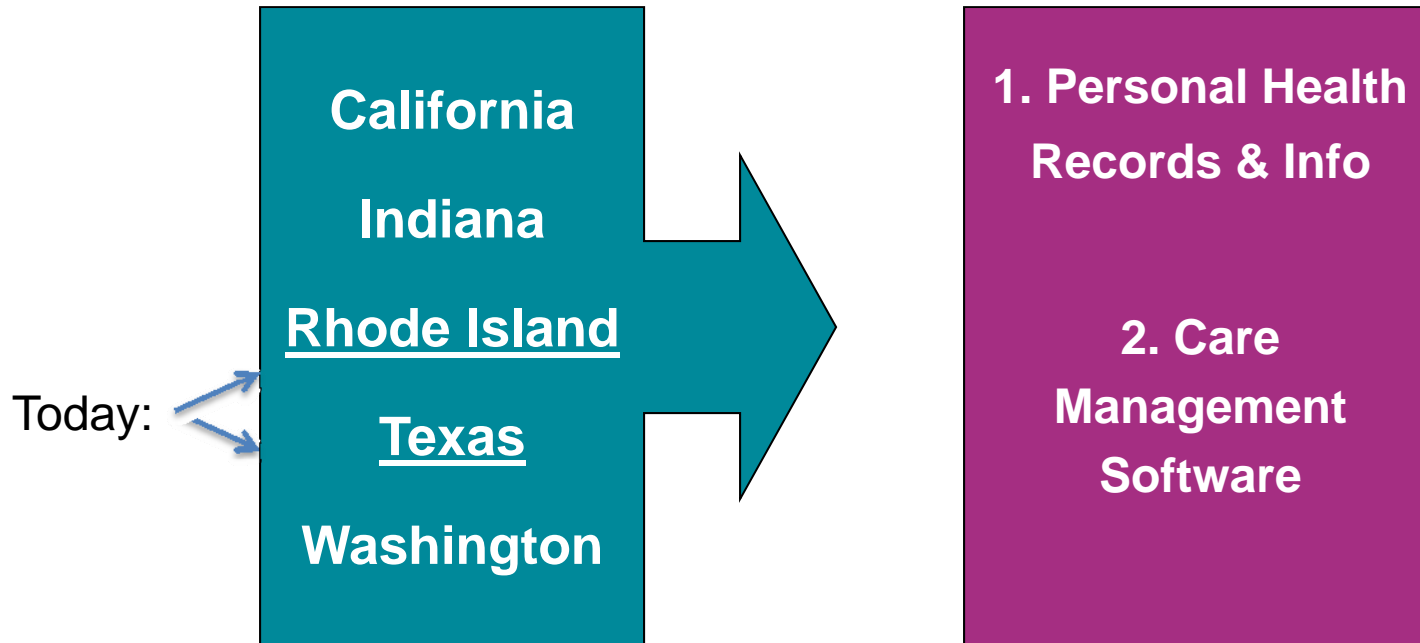
- RFP released September 2010
- January-December 2011 grant period
- \$500,000 in grant funds
- Tech4Impact designed to complement the AoA/CMS ADRC Evidence-Based Care Transition (“Option D”) Grant to States
- 16 States eligible → 12 applied → 5 selected



# Tech4Impact Grant Awards

## States

## Technology Approach



For more information about the 5 grant awards, see:

[http://www.techandaging.org/Tech4Impact\\_Grants\\_Abstracts.pdf](http://www.techandaging.org/Tech4Impact_Grants_Abstracts.pdf)

# CTA's Other Technology Diffusion Grants

- 22 CTA Grantees (“learning laboratories”)
- Technologies for *Medication Optimization*
  - Medication Adherence Technologies
    - In-Home Automated Meds Dispensers resulted in 98% adherence rate
  - Medication Management Technologies
    - Virtual Pharmacist Counseling identified 6 medication problems/patient, resolved 93%, 6:1 ROI
- Technologies for *Remote Patient Monitoring*
  - Heart Failure monitoring and messaging
- *Mobile Health* Technologies



# To Learn More . . .

- [www.techandaging.org](http://www.techandaging.org)
  - CTA publications on technologies
  - Lessons learned from grantees
  - Abstracts on 22 grant programs
  - ADOPT (Accelerating Diffusion of Proven Technologies) Toolkit
- Contact: [lredington@techandaging.org](mailto:lredington@techandaging.org)



## Improving Medication Management Post-Discharge via Pharmacist Home Visits and Use of an Electronic Personal Health Record (ER-Card®)

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# Project Team

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Associate Professor

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College of Pharmacy

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**Elaina Goldstein, JD MPA**

Assistant Professor Research

URI College of Pharmacy

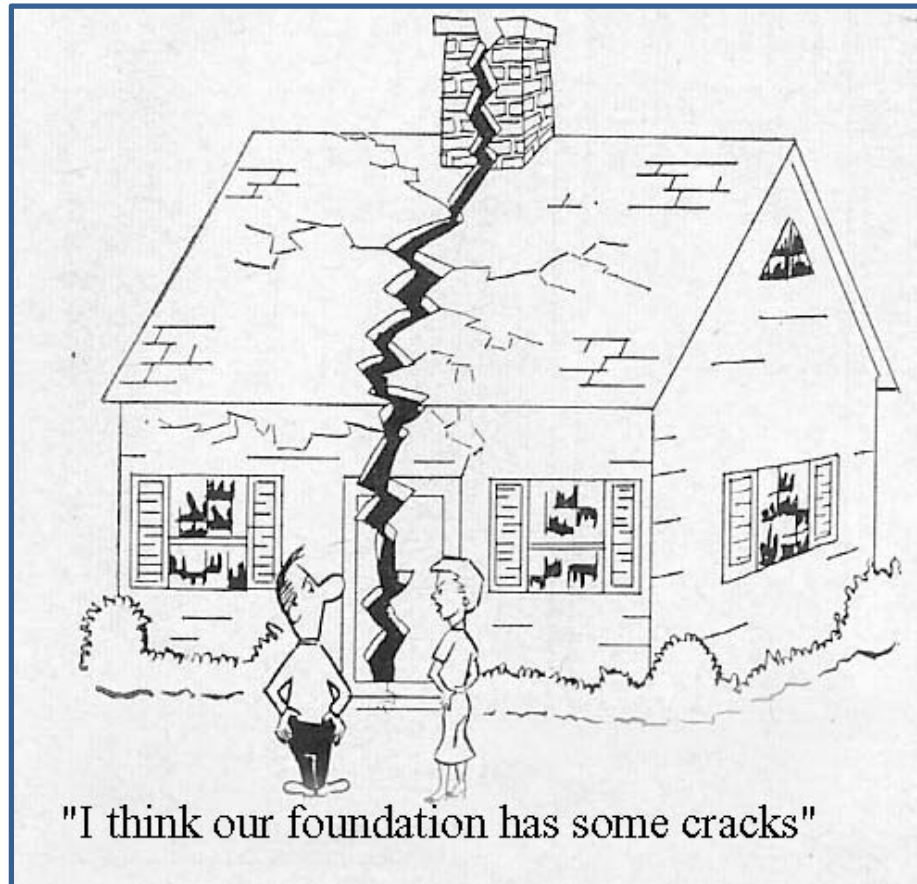
Executive Director, Rhodes to  
Independence

# Outline

## Care Transitions:

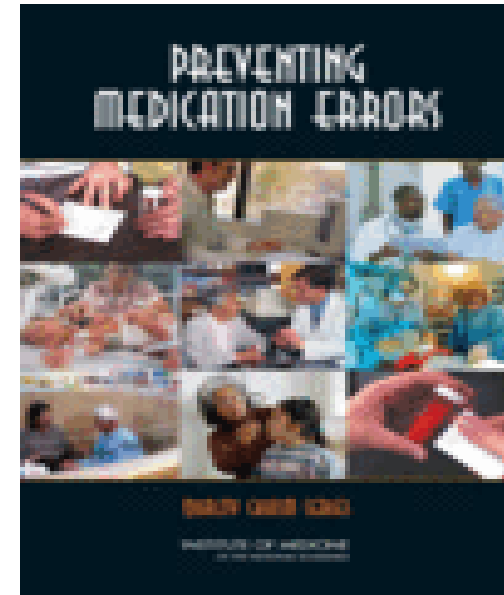
- Suboptimal medication management in the community setting
- Health Information Technology solutions
- The utility of electronic personal health records coupled with pharmacist involvement
- Sustainability and further development

# ...Prior to the Medical Home Era



# Medication Errors

- Medication errors are among the most common medical errors
- Estimated 1.5 million preventable injuries due to adverse drug events annually
- Total annual cost of at least \$3.5B (2006 dollars)
- Problems of misuse, overuse and underuse



*Preventing Medication Errors: Quality Chasm Series*

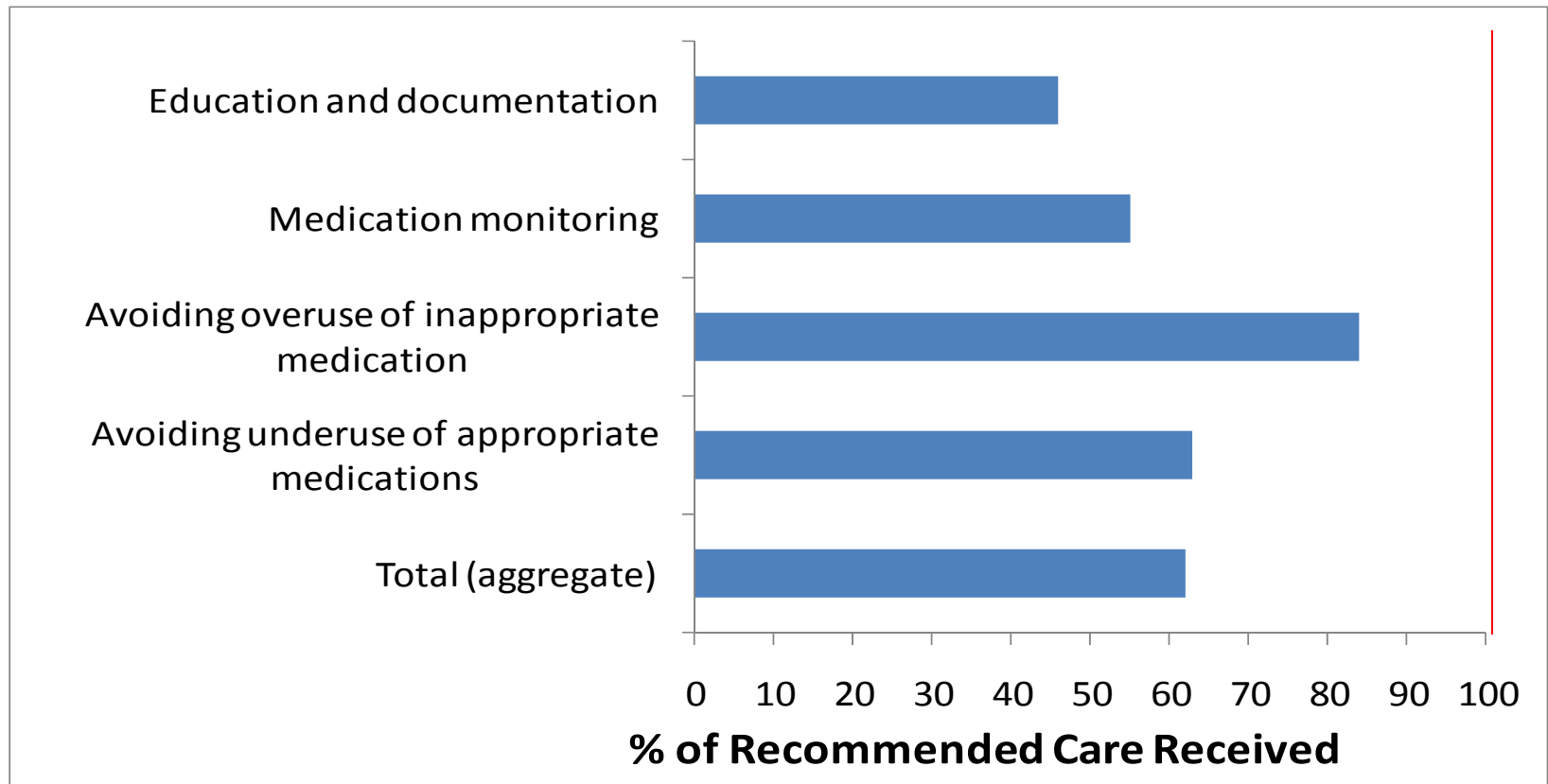


# Medication-Related Problems

- Untreated Indications
- Over-dosage
- Improper Med Selection
- Adverse Drug Reactions
- Sub-therapeutic Dosage
- Interactions
- Failure to Receive / Take Meds
- Med Use Without Indication

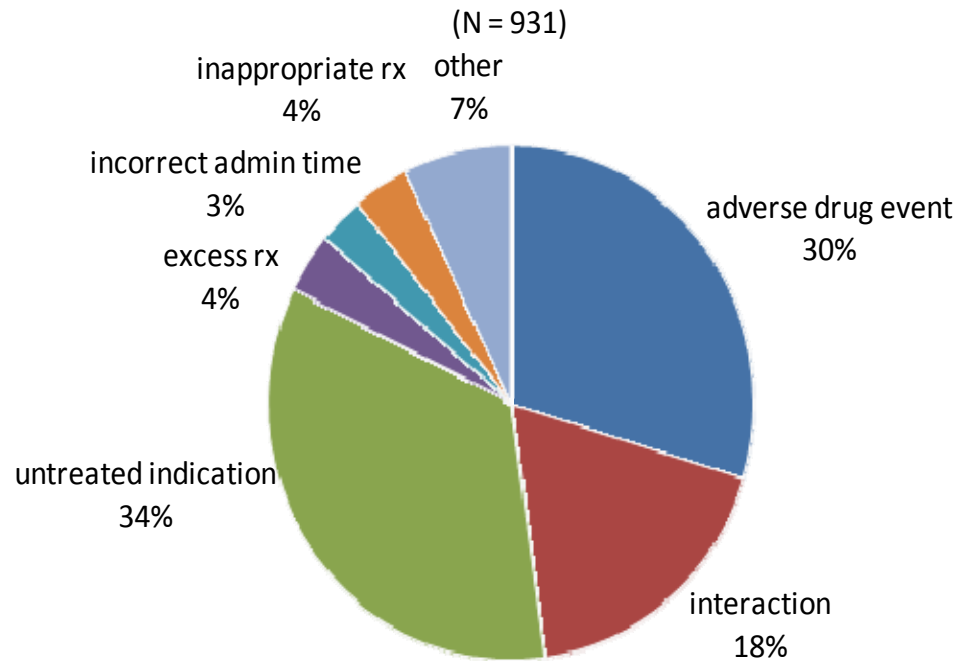
# The Quality of Pharmacologic Care for Adults in the United States

Shrank WH, Asch SM, Adams J, et al. Med Care 2006 Oct;44(10):936-45. (modified)



# ER-Card<sup>®</sup>/University of RI College of Pharmacy City of Warwick, RI Employee Health Initiative (2009, unpublished)

## Types of Medication-Related Problems Identified



# Posthospital Medication Discrepancies: Prevalence and Contributing Factors

*Coleman EA et al. Arch Intern Med. 2005; 165:1842-1847.*

## Patient-associated factors

- Did not fill prescription (4.8%)
- Did not need medication (0.8%)
- Money/financial barriers (5.6%)
- Intentional nonadherence (4.8%)
- Nonintentional nonadherence (33.9%)
- Performance deficit (0.8%)
- **Subtotal (51%)**

## System-associated factors

- Rx with known allergy/intolerance (2.4%)
- Conflicting information from difference informational sources (14.5%)
- Confusion b/w brand and generic names (2.4%)
- Discharge instructions incomplete, inaccurate, or illegible (16.1%)
- Duplication (8.1%)
- Incorrect dosage (0.8%)
- Incorrect quantity (0.8%)
- Incorrect label (3.2%)
- Cognitive impairment not recognized (0.8%)
- **Subtotal (49.2%)**

# Health Information Technology Initiatives in RI

- Electronic Prescribing
- Health Information Exchange Award
  - currentcare <http://www.currentcareri.org>
- Regional Extension Center Award
- Rhode Island Beacon Community
- ER-Card ePHR (electronic Personal Health Record) program

# Meaningful Use of EHRs: Selected Stage 1 Criteria Impacting Medication Management

- Exchange key clinical information (for example, problem list, medication list, allergies, and diagnostic test results), among providers of care and patient authorized entities electronically
- Generate and transmit permissible prescriptions electronically
- Implement drug-drug, drug-allergy, drug-formulary checks
- Perform medication reconciliation at relevant encounters and each transition of care
- Maintain medication / allergies list
- Generate lists of patients by specific conditions to use for quality improvement, reduction of disparities, research, and outreach.

## Electronic Health Record (EHR)

- Electronic by definition
- Data input: Clinician driven
- Multiple users
- Multi-functional
- “Gold” standard
- Gaps in information
- Ideal: promote safe, effective and efficient delivery of health care *through lens of providers, payers and regulators*

## Personal Health Record (PHR)

- Electronic or paper
- Data input: Patient driven
- Patient controls access
- Narrower function
- Data reliability a concern
- Gaps in information
- Ideal: promote safe, effective and efficient delivery of health care *through lens of empowered patient as active participant in care*

# Improving Medication Management Post-Discharge via Pharmacist Home Visits and use of an Electronic Personal Health Record (ER-Card)

**Funding:** Center for Technology and Aging, Tech4Impact Diffusion Grants Program

## *Project Aims*

1. To identify and address medication-related problems post discharge
  - Pharmacist home visit
  - ER-Card® Program as ePHR (plus)
2. Prevent avoidable rehospitalization
3. To learn more about the role of technology in supporting medication management activities during care transitions



# Collaborators

- URI College of Pharmacy
- ER-Card
- RI Department of Elderly Affairs
- Quality Partners of RI (Quality Improvement Organization, or QIO)
- RI Department of Human Services (Medicaid)
- Kent Hospital, Warwick, RI

# Intervention Elements

- Medication Management / Pharmacist
  - Overarching models / frameworks
- ER-Card<sup>®</sup> ePHR
  - Augmented by various services

# The Care Transitions Program: The Four Pillars

1. **Medication self-management:** Patient is knowledgeable about medications and has a medication management system.
2. Use of a **dynamic patient-centered record:** Patient understands and utilizes the Personal Health Record (PHR) to facilitate communication and ensure continuity of care plan across providers and settings. The patient or informal caregiver manages the PHR.
3. **Primary Care and Specialist Follow-Up:** Patient schedules and completes follow-up visit with the primary care physician or specialist physician and is empowered to be an active participant in these interactions.
4. **Knowledge of Red Flags:** Patient is knowledgeable about indications that their condition is worsening and how to respond.

Coleman EA. [http://www.caretransitions.org/four\\_pillars.asp](http://www.caretransitions.org/four_pillars.asp)

The Care Transitions Program<sup>SM</sup> is based in the Division of Health Care Policy and Research at the University of Colorado Denver, School of Medicine.

# Medication Reconciliation

- “ ... a process of obtaining a complete and accurate list of each patient’s current home medications - including name, dosage, frequency, and route of administration and comparing the physician’s admission, transfer, and/or discharge orders to that list.”

*Wong JD et al. Medication Reconciliation at Hospital Discharge: Evaluating Discrepancies. Annals of Pharmacotherapy. Oct, 2008. Vol 42*

- **Steps: Verify > Clarify > Reconcile > Transmit**

*Kliethermes MA. Medication reconciliation and the pharmacist’s role. <http://www.pharmacist.com>*

*The Massachusetts Coalition for the Prevention of Medical Errors*

[http://www.macoalition.org/reducing\\_medication\\_errors.shtml](http://www.macoalition.org/reducing_medication_errors.shtml)



# Medication Management/Pharmacist

## *Core Elements of an Medication Therapy Management (MTM) Service*

1. Medication therapy review
2. A personal medication record
3. A medication-related action plan
4. Intervention and/or referral
5. Documentation and follow-up

<http://www.pharmacist.com>

*Medication Therapy Management in Pharmacy Practice: Core Elements of an MTM Service Model Version 2.0. A joint initiative of the American Pharmacists Association and the National Association of Chain Drug Stores Foundation (2008)*





- An innovative, electronic personal health record and healthcare management service (<http://www.ER-Card.com>)
- Online ePHR system, 24 hour accessibility
- Secure, HIPAA compliant
- Patient information reviewed and updated by health professionals
- Free to study participants
- Long-standing partnership with URI College of Pharmacy

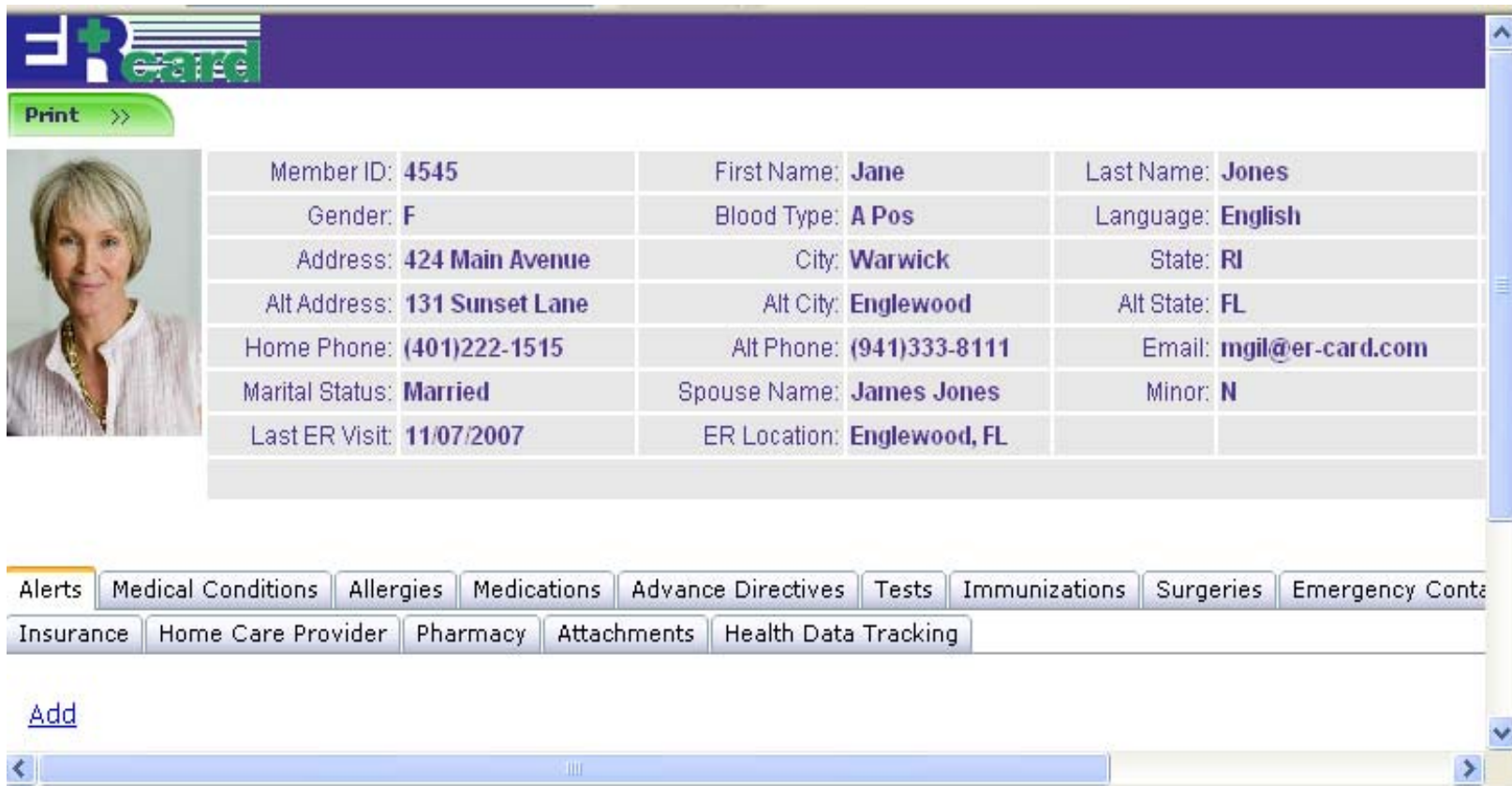


## Program Features:

- Care Management Service
- Medication Profile Review
- Emergency Notification System
- EMT (Emergency Medical Technician) Care Link

# How ER-Card Works

Proprietary software provides a user-friendly means to create an electronic personal health record and to share it with healthcare providers.



The screenshot displays the ER-Card web interface. At the top left is the ER-Card logo. Below it is a green 'Print >>' button. The main content area features a patient profile for Jane Jones. On the left is a portrait photo of Jane Jones. To the right is a table of personal and medical information. Below the table is a horizontal menu of tabs for various health record sections. At the bottom left is an 'Add' link, and at the bottom right is a scroll bar.

Member ID: 4545	First Name: Jane	Last Name: Jones
Gender: F	Blood Type: A Pos	Language: English
Address: 424 Main Avenue	City: Warwick	State: RI
Alt Address: 131 Sunset Lane	Alt City: Englewood	Alt State: FL
Home Phone: (401)222-1515	Alt Phone: (941)333-8111	Email: mgil@er-card.com
Marital Status: Married	Spouse Name: James Jones	Minor: N
Last ER Visit: 11/07/2007	ER Location: Englewood, FL	

Alerts | Medical Conditions | Allergies | Medications | Advance Directives | Tests | Immunizations | Surgeries | Emergency Contact  
Insurance | Home Care Provider | Pharmacy | Attachments | Health Data Tracking

[Add](#)



# Providing Medical Information

- ER-Card members have a number of ways to provide caregivers with their medical information:
  - Hard copies of their medical profile
  - ID cards and keychain tags
  - Window decals and refrigerator magnets
  - USB flash drive (optional)

# Access to ER-Card Member Profiles

- Providers may access ER-Card member profiles via:
  - 24-hour access 1-800 number
  - Internet
  - Fax
  - Email



# ER-Card: Privacy / Security

- Encrypted database on a private network
- Licensed facilities, physicians and first responders require username and password supplied by ER-Card
- Provide daily reports to members when records are accessed by physicians, hospitals, EMTs and when calls are received by the emergency response hotline

# Design

- Eligibility
  - Older age (60+); Chronic disease
    - Diabetes, Coronary Artery Disease (CAD)/Congestive Heart Failure (CHF), Chronic Obstructive Pulmonary Disease (COPD)/Asthma
  - English speaking without diminished cognition
  - Max N of 250
- Outcomes
  - Medication related problems (subgroups)
  - Group comparison (with/without intervention)
    - MRPs, Rehospitalization rates
  - Participant Satisfaction
  - 12 month project duration

# Anticipated Results

- Medication related problems occur commonly post-discharge
- Reduced rehospitalization rates
- Patients value the service
- Publication / awareness
  - Local media
  - Peer-reviewed journals
- Sustainability

# Roles of Information Technology

*(IOM, 2001)*



1. Reengineer care processes
2. Manage the burgeoning clinical knowledge base
3. Coordinate patient care across providers and settings
4. Support interdisciplinary team function
5. Facilitate performance and outcome measurements for improvement and accountability
6. Information rich environments for education and training

# Sustainability / Further Development

1. Involvement in local Health Information Exchange (HIE)/Person-Centered Medical Home (PCMH) initiatives
2. Publication: model and outcomes
3. Wider-scale pilot including insurers
4. Involve community (store-based) pharmacists
5. Reimbursement under Medicare Part D Medication Therapy Management (MTM) programs
6. Enrollment co-payments / fees
7. Other



# Care Transitions Intervention™ (CTI) Coaching Tool

*Developed in cooperation with the Care Transitions Program ([caretransitions.org](http://caretransitions.org)) for public use*

Angie Hochhalter, PhD  
Scott & White Healthcare  
State Of Texas

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# Background

- Revision of existing Care Transitions Program tool
- Freely available as Microsoft ACCESS database
- Goals
  - Facilitate highest quality coaching
  - Integrate coaching and evaluation
  - Improve project management capacity

# Referral, Enrollment, Project Status

**Consumer ID#** 2547 **Consumer Name** James C Martinez **Find Consumer** **Add New**

Goal 1 (consumer's words) Feel good enough to play with my grandkids Goal 2:

Referral and Site Info | Contact Info | Hospital Visit(s) | Home Visit(s) | Phone Calls (1) | Phone Call (2) | Other Phone Calls | Activation Checkout (PAA) | Demographics, SRH | CTM-3 | Health Literacy and Behavior | AURA | Barriers | Med Discrepancy

**Consumer ID#** 2547 **Last Name** Martinez **First Name** James **MI** C

Site Information	Referral and Enrollment	Status Change	Rehospitalization
<b>State</b> Texas <b>County</b> Bell County <b>UIC</b> 2 <b>Site</b> Scott and White Memorial <b>Coach</b> Other coach	<b>Referral Source</b> Case Manager <b>Referral Date</b> 6/3/2011 <b>Eligible</b> Yes <b>Date Eligibility was Determined</b> 6/3/2011 <b>Enrolled</b> Yes <b>Enrollment Date</b> 6/6/2011 <b>If not enrolled, why?</b> <input type="checkbox"/> Declined to give Medicare # If checked, enter 0 on Demographics tab <input checked="" type="checkbox"/> Explain the Program <input checked="" type="checkbox"/> Review and Sign enrollment forms (Consent form, Rights and Responsibilities)	<input type="checkbox"/> <b>Withdraw from Intervention</b> <b>Date of Withdrawal</b> <input type="checkbox"/> <b>Became Ineligible</b> <b>Date of Ineligibility</b> <input type="checkbox"/> <b>Deceased</b> <b>Deceased Date</b> <input type="checkbox"/> <b>Lost to Follow up</b> (Coach could not make contact with consumer) <b>Date lost to follow up:</b> <b>Reason for lost to follow up:</b> <input type="checkbox"/> <b>If lost to follow up explain follow up process</b>	<input type="checkbox"/> <b>Rehospitalized</b> <b>Reason for Rehospitalization:</b> <input type="checkbox"/> <b>Check here if readmitted to the same hospital as initially discharged from</b> <b>Rehosp Date:</b>

# Contact Information

Consumer ID# 2547 Consumer Name James C Martinez Find Consumer Add New

Goal 1 (consumer's words) Feel good enough to play with my grandkids Goal 2:

Referral and Site Info Contact Info Hospital Visit(s) Home Visit(s) Phone Calls (1) Phone Call (2) Other Phone Calls Activation Checkout (PAA) Demographics, SRH

**Contact information**

Medical Record Number: 000234555

Home Address: 197 North Main St Temple TX

Caregiver Name: Mary Martinez

Caregiver Relationship: daughter

Primary phone number: (254) 231-5555

Other family members:

Cell: (254) 782-5555

Home:

Caregiver number: (254) 792-5555

Relevant Doctors/clinics: PCP: Dr. Woodrow White  
Cardiologist: Dr. Henry Hart

Reason for hospital admission, other coach notes about hospital admit: Admitted for AMI

# Hospital Visit

<b>Consumer ID#</b>	2547	<b>Consumer Name</b>	James C Martinez	<b>Find Consumer</b>	<b>Add New</b>						
Goal 1 (consumer's words)	Feel good enough to play with my grandkids			Goal 2:							
Referral and Site Info	Contact Info	Hospital Visit(s)	Home Visit(s)	Phone Calls (1)	Phone Call (2)						
Other Phone Calls	Activation Checkout (PAA)	Demographics, SRH									
<b>Consumer ID#</b>	2547	<b>Last Name</b>	Martinez	<b>First Name</b>	James						
		<b>MI</b>	C								
<table border="1"> <thead> <tr> <th>Visit Date(s)</th> <th>Time Spent</th> </tr> </thead> <tbody> <tr> <td>6/6/2011</td> <td>26-30</td> </tr> <tr> <td>*</td> <td></td> </tr> </tbody> </table>	Visit Date(s)	Time Spent	6/6/2011	26-30	*		<b>Hospital Visits Notes</b> Met with pt and family members. Pt expressed intrest in program and was enrolled right away.				
Visit Date(s)	Time Spent										
6/6/2011	26-30										
*											
<b>Medication Management</b>	<b>Personal Health Record (PHR)</b>	<b>Medical Care Follow Up</b>	<b>Red Flags</b>	<b>Other</b>							
<input type="checkbox"/> Other <input type="text"/>	<input checked="" type="checkbox"/> Give PHR <input checked="" type="checkbox"/> Explain PHR <input type="checkbox"/> Other <input type="text"/>	<input type="checkbox"/> Discuss appointment for follow up <input type="checkbox"/> Other <input type="text"/>	<input type="checkbox"/> Other <input type="text"/>	<input checked="" type="checkbox"/> Discuss patient's personal goal <input checked="" type="checkbox"/> Give discharge checklist <input checked="" type="checkbox"/> Review discharge checklist <input type="checkbox"/> Other <input type="text"/>							

# Home Visit

<b>Consumer ID#</b>	2547	<b>Consumer Name</b>	James C Martinez	<b>Find Consumer</b>	<b>Add New</b>												
Goal 1 (consumer's words)	Feel good enough to play with my grandkids			Goal 2:													
Referral and Site Info   Contact Info   Hospital Visit(s)   Home Visit(s)   Phone Calls (1)   Phone Call (2)   Other Phone Calls   Activation Checkout (PAA)   Demographics, SRH   CTM-3   Health Literacy and Behavior   All																	
Visit Date(s)	Time Spent	Discharge Date	Notes														
5/9/2011	46-60	06/08/2011															
<table border="1"> <thead> <tr> <th>Medication Management</th> <th>Personal Health Record (PHR)</th> <th>Medical Care Follow Up</th> <th>Red Flags</th> <th>Other</th> <th>Questionnaires</th> </tr> </thead> <tbody> <tr> <td> <input checked="" type="checkbox"/> Create accurate medication list  <input type="checkbox"/> ID med discrepancies  <input type="checkbox"/> Advise to discuss medication with PCP/Pharmacist/Pois on Contol ect  <input type="checkbox"/> Problem solve issues about getting/taking medication  <input type="checkbox"/> Other  <input type="text"/> </td> <td> <input checked="" type="checkbox"/> Update PHR  <input type="checkbox"/> Encourage PHR use in follow up visit  <input type="checkbox"/> Other  <input type="text"/> </td> <td> <input checked="" type="checkbox"/> Establish whether appointments are scheduled  <input type="checkbox"/> Encourage the making of necessary appointments  <input type="checkbox"/> Develop/Role play follow up questions  <input type="checkbox"/> Other  <input type="text"/> </td> <td> <input checked="" type="checkbox"/> Review discharge instructions  <input checked="" type="checkbox"/> Discuss self mgmt  <input checked="" type="checkbox"/> Discuss symptoms/side effects to watch for  <input checked="" type="checkbox"/> Discuss plan for responding to symptoms/side effects  <input type="checkbox"/> Other  <input type="text"/> </td> <td> <input checked="" type="checkbox"/> Consumer sets specific goal(s). (Type goals in space provided at top of form)  <input type="checkbox"/> Discuss DME delivery, home health and similar services  <input type="checkbox"/> Discuss caregiver concerns and needs  <input type="checkbox"/> Discuss relevent community resources  <input type="checkbox"/> Discuss financial concerns or need for a social worker  <input type="checkbox"/> Other  <input type="text"/> </td> <td> <input type="button" value="Go To Questionnaires"/> </td> </tr> </tbody> </table>						Medication Management	Personal Health Record (PHR)	Medical Care Follow Up	Red Flags	Other	Questionnaires	<input checked="" type="checkbox"/> Create accurate medication list <input type="checkbox"/> ID med discrepancies <input type="checkbox"/> Advise to discuss medication with PCP/Pharmacist/Pois on Contol ect <input type="checkbox"/> Problem solve issues about getting/taking medication <input type="checkbox"/> Other <input type="text"/>	<input checked="" type="checkbox"/> Update PHR <input type="checkbox"/> Encourage PHR use in follow up visit <input type="checkbox"/> Other <input type="text"/>	<input checked="" type="checkbox"/> Establish whether appointments are scheduled <input type="checkbox"/> Encourage the making of necessary appointments <input type="checkbox"/> Develop/Role play follow up questions <input type="checkbox"/> Other <input type="text"/>	<input checked="" type="checkbox"/> Review discharge instructions <input checked="" type="checkbox"/> Discuss self mgmt <input checked="" type="checkbox"/> Discuss symptoms/side effects to watch for <input checked="" type="checkbox"/> Discuss plan for responding to symptoms/side effects <input type="checkbox"/> Other <input type="text"/>	<input checked="" type="checkbox"/> Consumer sets specific goal(s). (Type goals in space provided at top of form) <input type="checkbox"/> Discuss DME delivery, home health and similar services <input type="checkbox"/> Discuss caregiver concerns and needs <input type="checkbox"/> Discuss relevent community resources <input type="checkbox"/> Discuss financial concerns or need for a social worker <input type="checkbox"/> Other <input type="text"/>	<input type="button" value="Go To Questionnaires"/>
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# Phone Calls (with CTI content)

**Consumer ID#** 2547 **Consumer Name** James C Martinez [Find Consumer](#) [Add New](#)

Goal 1 (consumer's words) Feel good enough to play with my grandkids Goal 2:

[Referral and Site Info](#) [Contact Info](#) [Hospital Visit\(s\)](#) [Home Visit\(s\)](#) **Phone Calls (1)** [Phone Call \(2\)](#) [Other Phone Calls](#) [Activation Checkout \(PAA\)](#) [Demographics, SRH](#) [CTM-3](#) [Health Literacy and Behavior](#)

Date: 6/16/2011 Time Spent: 11:15

Medication Management	Personal Health Record (PHR)	Medical Care Follow Up	Red Flags	Other	Questionnaires
<input type="checkbox"/> Follow up on medication issues <input type="checkbox"/> ID med discrepancies <input type="checkbox"/> Advise to discuss medication with PCP/Pharmacist/Poison Control ect <input type="checkbox"/> Problem solve issues about getting/taking medication <input type="checkbox"/> Other	<input type="checkbox"/> Update PHR <input checked="" type="checkbox"/> Follow up on PHR use <input checked="" type="checkbox"/> Encourage PHR use in follow up visit <input type="checkbox"/> Other	<input checked="" type="checkbox"/> Follow up on past appointments <input checked="" type="checkbox"/> Encourage the making of necessary appointments <input checked="" type="checkbox"/> Develop/Role play follow up questions <input type="checkbox"/> Other	<input checked="" type="checkbox"/> Review discharge instructions <input checked="" type="checkbox"/> Discuss self mgmt <input checked="" type="checkbox"/> Discuss symptoms/side effects to watch for <input checked="" type="checkbox"/> Discuss plan for responding to symptoms/side effects <input type="checkbox"/> Other	<input checked="" type="checkbox"/> Discuss goal progress <input type="checkbox"/> Set new goals if necessary <input type="checkbox"/> Discuss DME delivery, home health and similar services <input checked="" type="checkbox"/> Discuss caregiver concerns and needs <input checked="" type="checkbox"/> Discuss relevant community resources <input type="checkbox"/> Discuss financial concerns or need for a social worker <input type="checkbox"/> Other	<a href="#">Go to Questionnaires</a>
<a href="#">Document Medication Discrepancies</a>					
<b>Phone Calls Notes</b>					

# Phone Calls (Logistics)

<b>Consumer ID#</b>	2547	<b>Consumer Name</b>	James C Martinez	<b>Find Consumer</b>	<b>Add New</b>
Goal 1 (consumer's words)	Feel good enough to play with my grandkids			Goal 2:	
Referral and Site Info	Contact Info	Hospital Visit(s)	Home Visit(s)	Phone Calls (1)	Phone Call (2)
Other Phone Calls		Activation Checkout (PAA)	Demographics, SRH	CTM-3	Health Literacy and Be
<b>Other Call 1</b>	<b>Time Spent</b>	<b>Other Call 2</b>	<b>Time Spent</b>	<b>Other Call 3</b>	<b>Time Spent</b>
6/11/2011	6-10				
<input checked="" type="checkbox"/> Consumer or Caregiver Initiated (Called Coach)	<input type="checkbox"/> Consumer or Caregiver Initiated (Called Coach)	<input type="checkbox"/> Consumer or Caregiver Initiated (Called Coach)	<input type="checkbox"/> Consumer or Caregiver Initiated (Called Coach)	<input type="checkbox"/> Consumer or Caregiver Initiated (Called Coach)	<input type="checkbox"/> Consumer or Caregiver Initiated (Called Coach)
<input type="checkbox"/> Coach Initiated - Spoke with PT	<input type="checkbox"/> Coach Initiated - Spoke with PT	<input type="checkbox"/> Coach Initiated - Spoke with PT	<input type="checkbox"/> Coach Initiated - Spoke with PT	<input type="checkbox"/> Coach Initiated - Spoke with PT	<input type="checkbox"/> Coach Initiated - Spoke with PT
<input type="checkbox"/> Coach Initiated - Spoke with CG (PT unable to Speak)	<input type="checkbox"/> Coach Initiated - Spoke with CG (PT unable to Speak)	<input type="checkbox"/> Coach Initiated - Spoke with CG (PT unable to Speak)	<input type="checkbox"/> Coach Initiated - Spoke with CG (PT unable to Speak)	<input type="checkbox"/> Coach Initiated - Spoke with CG (PT unable to Speak)	<input type="checkbox"/> Coach Initiated - Spoke with CG (PT unable to Speak)
<input type="checkbox"/> Coah Initiated - Contact Failed	<input type="checkbox"/> Coah Initiated - Contact Failed	<input type="checkbox"/> Coah Initiated - Contact Failed	<input type="checkbox"/> Coah Initiated - Contact Failed	<input type="checkbox"/> Coah Initiated - Contact Failed	<input type="checkbox"/> Coah Initiated - Contact Failed
<b>Other Phone Call 1 Notes</b>	<b>Other Phone Call 2 Notes</b>	<b>Other Phone Call 3 Notes</b>	<b>Other Phone Call 4 Notes</b>	<b>Other Phone Call 5 Notes</b>	
Pt had concerns about possible drug interactions					
<b>Other Call 6</b>	<b>Time Spent</b>	<b>Other Call 7</b>	<b>Time Spent</b>	<b>Other Call 8</b>	<b>Time Spent</b>
<input type="checkbox"/> Consumer or Caregiver Initiated (Called Coach)	<input type="checkbox"/> Consumer or Caregiver Initiated (Called Coach)	<input type="checkbox"/> Consumer or Caregiver Initiated (Called Coach)	<input type="checkbox"/> Consumer or Caregiver Initiated (Called Coach)	<input type="checkbox"/> Consumer or Caregiver Initiated (Called Coach)	<input type="checkbox"/> Consumer or Caregiver Initiated (Called Coach)
<input type="checkbox"/> Coach Initiated - Spoke with PT	<input type="checkbox"/> Coach Initiated - Spoke with PT	<input type="checkbox"/> Coach Initiated - Spoke with PT	<input type="checkbox"/> Coach Initiated - Spoke with PT	<input type="checkbox"/> Coach Initiated - Spoke with PT	<input type="checkbox"/> Coach Initiated - Spoke with PT
<input type="checkbox"/> Coach Initiated - Spoke with CG (PT unable to Speak)	<input type="checkbox"/> Coach Initiated - Spoke with CG (PT unable to Speak)	<input type="checkbox"/> Coach Initiated - Spoke with CG (PT unable to Speak)	<input type="checkbox"/> Coach Initiated - Spoke with CG (PT unable to Speak)	<input type="checkbox"/> Coach Initiated - Spoke with CG (PT unable to Speak)	<input type="checkbox"/> Coach Initiated - Spoke with CG (PT unable to Speak)
<input type="checkbox"/> Coah Initiated - Contact Failed	<input type="checkbox"/> Coah Initiated - Contact Failed	<input type="checkbox"/> Coah Initiated - Contact Failed	<input type="checkbox"/> Coah Initiated - Contact Failed	<input type="checkbox"/> Coah Initiated - Contact Failed	<input type="checkbox"/> Coah Initiated - Contact Failed
<b>Other Phone Call 6 Notes</b>	<b>Other Phone Call 7 Notes</b>	<b>Other Phone Call 8 Notes</b>	<b>Other Phone Call 9 Notes</b>		

# Medication Discrepancy Form

<b>Consumer ID#</b>	2547	<b>Consumer Name</b>	James C Martinez	<b>Find Consumer</b>	<b>Add New</b>
Goal 1 (consumer's words)	Feel good enough to play with my grandkids			Goal 2:	
<a href="#">Referral and Site Info</a>   <a href="#">Contact Info</a>   <a href="#">Hospital Visit(s)</a>   <a href="#">Home Visit(s)</a>   <a href="#">Phone Calls (1)</a>   <a href="#">Phone Call (2)</a>   <a href="#">Other Phone Calls</a>   <a href="#">Activation Checkout (PAA)</a>   <a href="#">Demographics, SRH</a>   <a href="#">CTM-3</a>   <a href="#">Health</a>					
<b>Event Description</b>					
Pt was taking Nexium for GERD and prescribed Plavix after hospitalized. Nexium counteracts the protective benefits of Plavix. Advised pt to contact pharmacist and PCP regarding prescriptions.					
<b>Causes and Contributing Factors Checklist (check all that apply)</b>					
<b>Consumer Level</b>		<b>System Level</b>			
<input type="checkbox"/> ADR	<input type="checkbox"/> Money	<input type="checkbox"/> Prescribed with known allergies	<input type="checkbox"/> Incorrect strength		
<input type="checkbox"/> Didn't fill prescription	<input type="checkbox"/> Performance deficit	<input type="checkbox"/> Conflicting info from different providers	<input type="checkbox"/> Incorrect quantity		
<input type="checkbox"/> Didn't need prescription	<input type="checkbox"/> Intolerance	<input type="checkbox"/> Confusion re: brand vs. generic name	<input type="checkbox"/> Mild cognitive impairment		
<input type="checkbox"/> Intentional, non-compliance	<input type="checkbox"/> Transportation	<input type="checkbox"/> Discharge instruction illegible	<input type="checkbox"/> Miscommunication		
<input type="checkbox"/> Knowledge deficit	<input type="checkbox"/> Other	<input type="checkbox"/> Discrepancy(ies) between med info sources	<input type="checkbox"/> No Caregiver/needs assistance		
		<input type="checkbox"/> Duplication	<input type="checkbox"/> Sight/dexterity issues		
		<input type="checkbox"/> Incorrect dosage	<input checked="" type="checkbox"/> Other		
		<input type="checkbox"/> Incorrect label			
<b>Resolution (check all that apply)</b>					
<input checked="" type="checkbox"/> Advised to stop taking/start taking/change administration of medication(s)			<input checked="" type="checkbox"/> Encouraged pt to talk to pharmacist about problem		
<input type="checkbox"/> Discouraged further intentional, non-compliance			<input type="checkbox"/> Provided education regarding performance deficit		
<input checked="" type="checkbox"/> Encouraged pt to call PCP/specialist about problem			<input type="checkbox"/> Provided resource information to facilitate compliance		
<input type="checkbox"/> Encouraged pt to talk to PCP/specialist about problem at follow-up visit			<input type="checkbox"/> Other		
Record: 1 of 1   No Filter   Search					



# Questionnaires

Goal 1 (consumer's words) 
 Goal 2:

Completed by caregiver Date Administered:

CHECK HERE if declined or Unable to Complete

Age:

Gender:

Hispanic/Latino:

Race:

Education:

Would you say that in general your health is...:

Medicare #:

**Care Transitions Measure (CTM-3)**

Date Administered: 
 Completed by caregiver

Check here if declined or unable to complete

- The hospital staff took my preferences and those of my family or caregiver into account in deciding what my health care needs would be when I left the hospital.
- When I left the hospital, I had a good understanding of the things I was responsible for in managing my health.
- When I left the hospital, I clearly understood the purpose for taking each of my medications.

DATE Administered: 
 Completed by caregiver

CHECK HERE if Declined or unable to complete

**Health Literacy**

How often do you have someone (like a family member, friend, hospital/clinic worker or caregiver) help you read hospital materials?

How confident are you filling out forms by yourself?

How often do you have problems learning about your medical condition because of difficulty understanding written information?

CHECK HERE if decline or unable to complete

**AURA**

- It is easy for me to ask my doctor questions.
- It is easy for me to ask for help if I don't understand something.
- It is easy for me to understand my doctor's instructions.
- It is easy for me to remember my doctor's instructions.

# Questionnaires

**Consumer ID#** 2547 **Consumer Name** James C Martinez **Find Consumer** **Add New**

Goal 1 (consumer's words) Feel good enough to play with my grandkids Goal 2:

Referral and Site Info Contact Info Hospital Visit(s) Home Visit(s) Phone Calls (1) Phone Call (2) Other Phone Calls Activation Checkout (PAA) **Demographics, SRH** **CTM-3** **Health Literacy and Behavior** **AURA** Barriers Med Discrepancies

Completed by caregiver Date Administered

CHECK HERE if declined or Unable to Complete

Age 67

Gender Male

Hispanic/Latino No

Race White

Education Completed High School or GED

Would you say that in general your health is... Fair

Medicare #: (enter 0 if consumer declines to provide)

**Care Transitions Measure (CTM-3)**

Date Administered: 6/23/2011  Completed by caregiver

Check here if declined or unable to complete

1. The hospital staff took my preferences and those of my family or caregiver into account in deciding what my health care needs would be when I left the hospital. 3

2. When I left the hospital, I had a good understanding of the things I was responsible for in managing my health. 3

3. When I left the hospital, I clearly understood the purpose for taking each of my medications. 5

DATE Administered: 6/23/2011  Completed by caregiver

CHECK HERE if Declined or unable to complete

**Health Literacy**

How often do you have someone (like a family member, friend, hospital/clinic worker or caregiver) help you read hospital materials? 2

How confident are you filling out forms by yourself? 1

How often do you have problems learning about your medical condition because of difficulty understanding written... 5

CHECK HERE if decline or unable to complete

**AURA**

1. It is easy for me to ask my doctor questions. Agree a little

2. It is easy for me to ask for help if I don't understand something. Agree a little

3. It is easy for me to understand my doctor's instructions. Agree a little

4. It is easy for me to remember my doctor's instructions. Disagree a little



# Coach-Rated Patient Activation

**Consumer ID#** 2547 **Consumer Name** James C Martinez

Goal 1 (consumer's words)  Goal 2:

**To be completed by Coach at end of Intervention**

**Date Administered** 
 Check here if you are rating the caregiver's activation rather than the consumer's activation  
 Check here to indicate that consumer demographics are entered in Harmony

Medication Management	Personal Health Record (PHR)	Medical Care Follow Up	Red Flags	Activation for working on and achieving goal	Rate the consumer's progress on his/her goal(s)
<input type="checkbox"/> 1 <input type="checkbox"/> 2 <input checked="" type="checkbox"/> 3 <input type="checkbox"/> 4	<input type="checkbox"/> 1 <input checked="" type="checkbox"/> 2 <input type="checkbox"/> 3 <input type="checkbox"/> 4	<input type="checkbox"/> 1 <input type="checkbox"/> 2 <input checked="" type="checkbox"/> 3 <input type="checkbox"/> 4	<input type="checkbox"/> 1 <input type="checkbox"/> 2 <input checked="" type="checkbox"/> 3 <input type="checkbox"/> 4	<input type="checkbox"/> 1 <input type="checkbox"/> 2 <input checked="" type="checkbox"/> 3 <input checked="" type="checkbox"/> 4	<input type="text" value="Made some progress"/>

\*\*\*1 = Not activated at all  
 \*\*\*4 = Very Activated

**Notes:**

Medication Management				PHR		Medical Care Follow Up		Red Flags	
#1	#2	#3	#4	#5	#6	#7	#8	#9	#10
Demonstrates effective use of Medication Management System (medication organizer, flow chart, etc.)	For each medication, understands the purpose, when and how to take, and possible side effects	Demonstrates ability to accurately update medication list	Agrees to confirm medication list with PCP and/or Specialist	Understands the purpose of PHR and the importance of updating PHR	Agrees to bring PHR to every health encounter	Can schedule and follow through on appointment(s).	Writes a list of question for PCP and/or specialist and brings to appointment	Demonstrates understanding of Red Flags, or warning signs that condition may be worsening	Reacts appropriately to Red Flags per education given (or understands how to react appropriately)
Yes <input type="button" value="v"/>	Yes <input type="button" value="v"/>	Yes <input type="button" value="v"/>	Yes <input type="button" value="v"/>	Yes <input type="button" value="v"/>	Yes <input type="button" value="v"/>	Yes <input type="button" value="v"/>	No <input type="button" value="v"/>	Yes <input type="button" value="v"/>	Yes <input type="button" value="v"/>

# Coach-Rated Barriers to Engagement (Connecticut Measure)

<b>Consumer ID#</b> 2547		<b>Consumer Name</b> James C Martinez		<a href="#">Find Consumer</a>	<a href="#">Add New</a>
Goal 1 (consumer's words) Feel good enough to play with my grandkids			Goal 2:		
Referral and Site Info		Contact Info	Hospital Visit(s)	Home Visit(s)	Phone Calls (1)
		Phone Call (2)	Other Phone Calls	Activation Checkout (PAA)	Demographics, SRH
		CTM-3	Health Literacy		
<b>Date Administered</b> 6/23/2011		<b>Care Transitions Challenges/Barriers</b>			
<b>Physical Health</b>	<b>Cognitive Status: Mental or Psychosocial Health</b>	<b>Financial or Insurance Benefits</b>	<b>Consumer engagement, awareness, and skills</b>	<b>Services and Supports</b>	
<input type="checkbox"/> Current, new, or undisclosed physical health problem or <input type="checkbox"/> Medical testing issues or delays <input type="checkbox"/> Inability to manage physical health or illness in community <input type="checkbox"/> Missing or waiting for physical health related documents or records Other:	<input type="checkbox"/> Current, new or undisclosed mental/psychological health problem or DSM-4 diagnosis <input type="checkbox"/> Current substance/alcohol abuse or possible relapse <input type="checkbox"/> Dementia or cognitive issues <input type="checkbox"/> Inability to manage mental/psychosocial health in community Other:	<input type="checkbox"/> Lack of or insufficient financial resources <input checked="" type="checkbox"/> Consumer credit or unpaid bills <input type="checkbox"/> SSDI or other cash benefits <input checked="" type="checkbox"/> SSA, insurance, or other financial benefits Other:	<input type="checkbox"/> Disengagement or lack/loss of motivation <input type="checkbox"/> Lack of awareness or unrealistic expectations regarding health status, disability, or needed supports <input type="checkbox"/> Lack of independent living skills Other:	<input type="checkbox"/> Lack of home health, or other paid support staff <input type="checkbox"/> Lack of mental/psychosocial health services <input type="checkbox"/> Lack of assistive technology or durable medical equipment (excluding home modifications) <input type="checkbox"/> Lack of any other services or supports Other:	
<b>Waiver program</b>	<b>Housing</b>	<b>Legal or Criminal</b>	<b>Facility related</b>	<b>Other involved individuals</b>	
<input type="checkbox"/> Targeted waiver full <input type="checkbox"/> Ineligible for or denial of waiver services <input type="checkbox"/> Current waivers do not meet consumer needs <input type="checkbox"/> Waiting for evaluation, application review, or response from waiver Other:	<input type="checkbox"/> Lack of or insufficient housing <input type="checkbox"/> Ineligible for or waiting for approval from RAP or other housing programs <input type="checkbox"/> Housing modification issues <input type="checkbox"/> Delays related to housing authority, agency, or housing coordinator <input type="checkbox"/> Delays related to lease, landlord, apartment manager, Other:	<input type="checkbox"/> Consumer criminal history <input type="checkbox"/> Probate court issues <input type="checkbox"/> Missing or waiting for identity, birth certificate, or other related records <input type="checkbox"/> Legal representative issues: DPOA, Conservator Other:	<input type="checkbox"/> Facility staff or administration issues <input type="checkbox"/> Waiting for, loss of, or absence of discharge planning Other:	<input type="checkbox"/> Issues with spouse/partner, family, or friends <input type="checkbox"/> Physical health provider/doctor opposed, unresponsive, or unresponsive <input type="checkbox"/> Mental health provider/doctor opposed, unresponsive, or unresponsive <input type="checkbox"/> Other provider or state agency, unresponsive, or unresponsive Other:	



# Data Table Examples

## IDs, Names, Goals

StudyNo	PLstName	PFstName	PMidni	Goal 1	Goal 2	Add N
2547	Martinez	James	C	Feel good enough to play with my grandkids		
2567	Howard	Neil	M	Quit smoking		
3400	Schneider	Eleanor	F	To not fall again		
6700	Faeke	Carter	J	To manage diabetes so another amputation does not happen		

## Demographics and Self-Rated Health

StudyNo	Age	Sex	Hispanic/Lat	Race	Highest grade completec	Refused/Un	Date	SRH	Completed by c	Medicare #
2547	67	Male	Yes	White	Completed High School or C	<input type="checkbox"/>	6/9/2011	Fair	<input type="checkbox"/>	
2567	61	Male	No	Native Hawaiia	Some college	<input type="checkbox"/>	5/21/2011	Good	<input type="checkbox"/>	
3400	81	Female	No	White	Completed High School or C	<input type="checkbox"/>	4/9/2011	Fair	<input type="checkbox"/>	
6700	55	Male	No	Black or Africar	Graduated college	<input type="checkbox"/>	3/2/2011	Very Good	<input type="checkbox"/>	

## Care Transitions Measure (CTM-3)

StudyNo	Preferences	Good Understanding	Purpose of Meds	Unable/Refused	Date	Completed by caregiver
2547	Agree	Agree	Agree	<input type="checkbox"/>	6/23/2011	<input type="checkbox"/>
2567	Agree	Strongly Agree	Agree	<input type="checkbox"/>	6/4/2011	<input type="checkbox"/>
3400	Agree	Strongly Agree	Strongly Agree	<input type="checkbox"/>	4/23/2011	<input type="checkbox"/>
6700	Agree	Agree	Strongly Agree	<input type="checkbox"/>	4/6/2011	<input type="checkbox"/>



# Data Can be Collated into Reports for Project Management

## Report Contact Dates

StudyNo	Enrollment Date	Hospital Visit Date	Discharge Date	Home Visit Date	Ph2Date	Ph7Date	Rehospitalized	RehopsDT
987	6/5/2011	6/5/2011	06/08/2011	6/9/2011	6/16/2011	6/23/2011	<input type="checkbox"/>	
2547	6/6/2011	6/6/2011	06/08/2011	6/9/2011	6/16/2011	6/23/2011	<input type="checkbox"/>	
2567	5/18/2011	5/17/2011	05/18/2011	5/21/2011	5/28/2011	6/4/2011	<input type="checkbox"/>	
3400	4/5/2011	4/5/2011	04/08/2011	4/9/2011	4/16/2011	4/23/2011	<input type="checkbox"/>	
6700	3/22/2011	3/22/2011	03/22/2011	3/23/2011	3/30/2011	4/6/2011	<input type="checkbox"/>	

Thursday, June 16, 2011

Page 1 of 1



# Questions, Comments, Suggestions?

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Scott & White Healthcare

State of Texas

# Resources: Care Transitions

- <http://www.healthcare.gov/center/programs/partnership/index.html> (Partnership for Patients)
- <http://www.cms.gov/DemoProjectsEvalRpts/MD/itemdetail.asp?itemID=CMS1239313> (Community-based Care Transitions Program)
- [http://www.aoa.gov/Aging\\_Statistics/Health\\_care\\_reform.aspx](http://www.aoa.gov/Aging_Statistics/Health_care_reform.aspx) (AoA's Health Reform page)
- [http://www.aoa.gov/AoARoot/AoA\\_Programs/HCLTC/ADRC\\_CareTransitions/index.aspx](http://www.aoa.gov/AoARoot/AoA_Programs/HCLTC/ADRC_CareTransitions/index.aspx) (AoA's Aging and Disability Resource Centers Care Transitions page)
- <http://www.adrc-tae.org/tiki-index.php?page=CareTransitions> (AoA's Aging and Disability Resource Centers Technical Assistance Exchange care transitions page)
- <http://www.cfmc.org/caretransitions/Default.htm> (Care Transitions Quality Improvement Organization Support Center)
- <http://www.ltqa.org/wp-content/themes/ltqaMain/custom/images//Innovative-Communities-Report-Final-0216111.pdf> (Innovative Communities report from the Long-Term Quality Alliance)





# Resources: Health Information Technology

- <http://www.techandaging.org/> (Center for Technology and Aging)
- [http://healthit.hhs.gov/portal/server.pt/community/healthit\\_hhs\\_gov\\_hitech\\_programs/1487](http://healthit.hhs.gov/portal/server.pt/community/healthit_hhs_gov_hitech_programs/1487) (The Beacon Communities Health Information Technology for Economic and Clinical Health [HITECH] Act programs)
- <http://www.kaiseredu.org/issue-modules/health-information-technology/background-brief.aspx> (Kaiser Family Foundation Health Information Technology Background Brief)



# Resources: **Affordable Care Act**

- [http://www.aoa.gov/Aging\\_Statistics/Health\\_care\\_reform.aspx](http://www.aoa.gov/Aging_Statistics/Health_care_reform.aspx) (AoA's Health Reform web page – where webinar recordings, transcripts and slides are stored)
- <http://www.healthcare.gov> (Department of Health and Human Services' health care reform web site)
- <http://www.thomas.gov/cgi-bin/bdquery/D?d111:1:./temp/~bdsYKv:./home/LegislativeData.php?n=BSS;c=111> | (Affordable Care Act text and related information)

# Next Training

- *Aligning Systems to Support Medicare-Medicaid Enrollees*
  - Tuesday, July 5, 2:00-3:30 pm Eastern
  - Watch your email for registration information



# Questions/Comments/Stories/ Suggestions for Future Webinar Topics?

Send them to:

[AffordableCareAct@aoa.hhs.gov](mailto:AffordableCareAct@aoa.hhs.gov)