

# **Humboldt Patient Partners Toolkit**

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## Contents

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Patient Partner Candidate Interview Questions	<b>3</b>
Patient Partner Recruitment Strategies	<b>4</b>
PCR 3.0 Patient Partner Contract	<b>6</b>
Practice Guidelines for Patient Engagement in PCR 3.0	<b>11</b>
Patient Engagement Roles and Recommendations 2012	<b>14</b>

## **Patient Partner Candidate Interview Questions**

These questions may be useful in a conversation with a candidate for one of the Patient Partners for your PCR team. . If it would decrease any potential interference with the practice/patient relationship, staff from Aligning Forces Humboldt would be glad to act as your agent in the selection process.

### Questions for Patient Partner candidate:

1. Why do you want to volunteer to be a Patient Partner?
  
2. Patient Partners generally either have chronic conditions or have been a caregiver for someone with chronic conditions. Does this apply to you?
  
3. Patient Partners play a crucial role in the PCR process in that they are able to address patient insights and viewpoints for the medical office teams in supportive and respectful ways. Sometimes this will include gentle constructive criticism or suggestions for previously established processes.
  - a) Are you comfortable respectfully sharing insights in a team of your medical providers?
  - b) Can you describe some ways in which you have used constructive criticism skills in the past?
  
4. Do you have experience participating in groups?  
Please describe: (including size of a group i.e. 12-15? Experience in team leading?)
  
5. Do you have any previous volunteer experience and if so what?
  
6. Have you worked with a variety of people i.e. different educational levels, cultures? Do you feel comfortable working with in a group where a variety of opinions (some of which are conflicting) are shared?
  
7. While your personal opinion is of great value, your role on the team is to represent the needs of all patients. Do you feel you can do this?
  
8. Do you see any barriers or challenges in being a Patient Partner? (i.e. energy, time, transportation, availability, chronic condition limitations)? (Note briefly)
  
9. Do you have any transportation challenges? Will you be able to arrange transportation to in-office team, Patient Partner, and PCR meetings?
  
10. Confirm commitment to attending full experience (See “Patient Partner Role and Responsibilities Agreement”).

## **Patient Partner Recruitment Strategies**

In order to engage the right individuals for your practice team, Aligning Forces Humboldt has developed a suggested process around recruitment efforts.

- 1) Establish desired characteristic for your Patient Partners. This is a critically important step in finding the right patient partners for your team.

Key characteristics of the patient partners should include:

- Good communication skills.
- The ability to collaborate with diverse individuals in a group setting.
- Representative of your client base.
- Desire to increase knowledge around quality issues.
- Ability to contribute and provide patient perspective on team activities.
- Commitment to improving care related to the team goals.
- The ability to maintain confidentiality.
- Sufficient transportation resources to attend team, patient partner, and PCR meetings.
- Availability to commit time to the project.

If you have a Patient Partner who worked with your team during PCR 2.0, you are welcome to invite them to be one of your Patient Partners for PCR 3.0. If you have a Patient Partner from PCR 2.0 that you will not be inviting back to participate in this year's collaborative, staff from Aligning Forces Humboldt can help mitigate that conversation with your previous Patient Partner (upon request).

Due to the fact that you have the opportunity to recruit two patient partners, you may want to consider recruiting patients who have had diverse encounters with the health care system (which will broaden the patient viewpoints your team is exposed to). Additionally, you may want to choose patient partners whose personalities will mesh within your established team dynamic, share the practice team's level of engagement in the project, and are available during your established team meeting times.

- 2) Obtain referrals from office staff. Talk with staff about the patient partner role, describe the eligibility criteria, and ask staff to make recommendations from your patient population.
- 3) Aligning Forces Humboldt has developed lists of individuals that have participated in "Our Pathways to Health" a chronic disease self-management program, and have stratified these individuals by medical practice (only patients who have given permission for us to notify you of their attendance are included). This list can provide you with potential candidates for patient partners. If desired, you can work in collaboration with Jessica Osborne-Stafsnes from Aligning Forces Humboldt for help recruiting a patient partner (contact information available below). If you so choose, this may include an "interviewing" process for your top candidates conducted by Aligning Forces Humboldt.

Your team has the right to select the patient partners who will work well with you. If it would decrease any potential interference with the practice/patient relationship, staff from Aligning Forces Humboldt would be glad to act as your agent in the selection process.

- 4) **Submit the completed applications of your patient partners to Jessica by 02/01/2012.** Jessica will be in contact with your patient partners to welcome them to the program and discuss the patient partner orientation.
- 5) Jessica Osborne-Stafsnes, as well as your improvement advisor, will continue to support all members of your PCR team throughout the PCR 3.0 year, in making the patient partners useful and productive members of your improvement team.

Contact Information:

Jessica Osborne-Stafsnes, Aligning Forces Humboldt  
Phone: (707) 445-2806 ext. 2. Email: [jessica@communityhealthalliance.org](mailto:jessica@communityhealthalliance.org)

# Aligning Forces Humboldt Primary Care Renewal 3.0 Patient Partner Roles and Responsibilities Agreement

## Overview

Congratulations! You have been identified as a valuable stakeholder in improving the quality of healthcare. Your perspective as a consumer of health care will be a powerful part of the Primary Care Renewal process.

The Primary Care Renewal (PCR) is a collaborative of local primary care medical offices that are committed to improving the quality of healthcare, patient experience, and ensuring that high quality care is delivered at reasonable cost. Many of the practices involved in the Primary Care Renewal collaborative have been working towards achieving these aims since 2009. This collaborative year will focus on working to improve the quality of health care in the arenas of helping patients receive the care they need, when they need it, and a way that works for them. Specifically, the PCR collaborative will focus on “Access and Continuity of Care” and “Care Coordination.” The nuances of these focus areas will be explained in-depth to Patient Partners throughout the PCR collaborative year. Last year, participating PCR teams were joined by Patient Partners (individual patients recruited from each practice to share patient insight and feedback on team quality improvement efforts). Because Patient Partner team members proved to be such vitally important members of the PCR 2.0 collaborative, practices will recruit two Patient Partners for each team in PCR 3.0.

Patients are the consumers of health care and so your perspective is critically important to include in any group working on health care issues. Your perspective can make PCR efforts more reflective of patients’ needs. You may encounter times when you and the other Patient Partner on your team do not share the same perspective. That’s okay! Each of your observations have tremendous value and the diversity of opinions shared will give added riches to the team’s understanding of the patient experience of care. As a Patient Partner, your impact on a medical office practice team will be greater if you are able to understand the viewpoints of team members who are around the table and work collaboratively with them.

You will not be alone. Medical teams will each have two patient partners, which will provide you with built-in peer support. In addition, you will be attending meetings designed and held solely for Patient Partners immediately prior to PCR meetings to prepare you for upcoming meeting topics, provide a supportive environment in which to ask questions, and give you another forum to share your perspectives and insights as a patient. Additionally, Betsy Stapleton and Jessica Osborne-Stafsnes from Aligning Forces Humboldt (a local organization devoted to supporting patients in their health and health care) will be on hand throughout the collaborative year to provide you support, guidance, and training to assist you in becoming an effective spokesperson for patients.

## Role of the Patient Partner:

You have been selected by your medical practice to serve as one of the two Patient Partners on their PCR team. Your role will be to share your patient perspective as your PCR team works towards improving the quality of their care through measurement, improvement methods, managing change and developing “best practices.” The following recommendations and responsibilities will clarify the objectives of patient partners and support your role in the PCR team.

- **Advise, consent, and confirm:** You have a responsibility to share your perspectives to shape efforts to be most effective for other consumers.
- **Participate Fully:** Patient Partners will be asked to attend at least 5 of 6 PCR meetings, with the expectation that Patient Partners support meetings will be attended as well.

- **Be informed and empowered:** Healthcare issues can be complex and it's important to be informed. Ask questions and for help when information isn't clear. Aligning Forces Humboldt wants to support you in your understanding of health care quality and related issues.
- **Listen, speak-up, and collaborate:** Listen to the perspectives shared in your PCR team. Speak up when you can provide insights from the patient perspective. Collaborate with your team members to work towards improving the quality of care. Don't be afraid to share your insights!
- **Be respectful and maintain confidentiality:** Be sensitive to the vulnerability of the PCR teams as they honestly and openly discuss areas of strengths and weakness in their medical office practice.

### **Activities and Meetings**

Major activities required of the participating Patient Partners will include:

- Attending and participating in PCR Meetings  
6 meetings per year; typically held from 6-8pm in Eureka. Catered dinner included before meeting from 5-6pm.
- Attending Patient Partner Orientation  
One-time, half day, mandatory orientation to the PCR process for Patient Partners. Tentatively scheduled for February 11, 2012.
- Attending Patient Partner Support Meetings  
6 two hour support meetings held throughout the PCR calendar year, to support Patient Partners, provide a space for questions or clarification, introduce quality concepts, etc. These meetings are held the day before each PCR meeting.
- Attending 50% of in-office Team Meetings  
These meetings are scheduled by your practice team to discuss their quality improvement goals and work. Please consult with your team for dates and times.

Additional Activities:

Throughout the course of the collaborative year, there will be additional voluntary opportunities for engagement such as focus groups, consumer trainings, and quality improvement events. We will keep you abreast of these opportunities as they arise.

### **Benefits of Participation:**

- The opportunity to provide crucial perspective as medical office practices improve the quality of their care.
- Free admission to Quality and Consumer Leadership Events
- Development of understanding of Quality Improvement and related consumer health issues through customized support meetings.

**At the completion of the collaborative year, Patient Partners who have attended at least five out of the six PCR meetings and 75% of the Patient Partner meetings will receive a \$300 stipend.**

### **Changes in Patient Partner Participation**

Staff from Aligning Forces Humboldt and your PCR team want to support you so that your experience as a Patient Partner is a valuable and positive one. If you have concerns about your experience please contact Jessica at Aligning Forces Humboldt and she will work with you (and your PCR team as necessary) to work through any challenges.

Both you, and your practice team, have the right to terminate your participation as Patient Partner, should efforts to resolve challenges be unsuccessful. Any changes in your status as a Patient Partner should be communicated to Aligning Forces Humboldt within 3 business days.

## Patient Partner Confidentiality Agreement

In your role as a patient partner on your medical offices PCR 3.0 team you will hear confidential and privileged information about not only your Medical Home, but others. It is vitally important that you not share this information outside of the PCR meetings and Patient Partner Support Meetings.

All the medical groups participating in PCR 3.0 are committed to improving the quality of care that they deliver to the consumer of their services- patients. In order to improve, areas of less than ideal performance must first be identified. Just like you need to feel confident that your health care provider will keep personal information private for you to be willing to share areas of concern, medical groups must have the same assurance from you.

The Patient Partner Support Meetings will offer you a place to discuss any issues of concern with your peers, other patient partners, and Aligning Forces Humboldt Staff.

Therefore, we ask you to sign the following agreement:

I, \_\_\_\_\_, agree to keep confidential any information I obtain in the course of my participation in the PCR 3.0. I will not discuss any such information outside of the Patient Partner and PCR 3.0 meetings without the express permission of the involved parties. If I have any concerns about information obtained by my participation in the process I will bring them to the attention of the Aligning Forces Humboldt staff who will work with me and the Humboldt Del-Norte Independent Practice Association to resolve them. This confidentiality agreement remains in place after the end of my participation in the collaborative.

Signature: \_\_\_\_\_ Date: \_\_\_\_\_  
Patient Partner

Signature: \_\_\_\_\_ Date: \_\_\_\_\_  
Representative of Medical Practice

Practice Name: \_\_\_\_\_

**Aligning Forces Humboldt**  
**Primary Care Renewal Collaborative 3.0**  
**Patient Partner Role and Responsibilities Agreement**

**Patient Partner Information**

**Patient Partner Name:** \_\_\_\_\_

Practice Name: \_\_\_\_\_

Primary Contact Name: \_\_\_\_\_

PR Address: \_\_\_\_\_

City \_\_\_\_\_

Zip \_\_\_\_\_

Email: \_\_\_\_\_

Phone: \_\_\_\_\_

Fax: \_\_\_\_\_

**Commitment**

As a Patient Partner, I commit to:

- Attending and participating in PCR Meetings
- Attending and participating in Patient Partner Support Meetings
- Maintaining confidentiality of matters discussed during PCR 3.0
- Working collaboratively with team members, other patient partners, and support staff from Aligning Forces Humboldt

**Signatures**

Name: \_\_\_\_\_ \_\_Patient Partner

Signature: \_\_\_\_\_ Date: \_\_\_\_\_

Name: \_\_\_\_\_ \_\_Primary Clinic Contact

Signature: \_\_\_\_\_ Date: \_\_\_\_\_

Name: Jessica Osborne-Stafsnes \_\_\_\_\_ \_\_Aligning Forces Humboldt

Signature: \_\_\_\_\_ Date: \_\_\_\_\_

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For additional information, contact Jessica Osborne-Stafsnes at [Jessica@communityhealthalliance.org](mailto:Jessica@communityhealthalliance.org) or 707.445.2806 ext. 2.

Please return the completed form by February 1<sup>st</sup> 2011 to Jessica Osborne-Stafsnes by fax to 707.822.0755 or via mail:

**Aligning Forces Humboldt**  
**Attn: Jessica Osborne-Stafsnes**  
**1125 16<sup>th</sup> Street, Suite 204**  
**Arcata, California 95521**

## **Practice Guidelines for Patient Partner Engagement in PCR 3.0**

### **Background:**

Patient Partners were an integral component of PCR 2.0. In building upon the patient engagement successes from last year's collaborative, PCR 3.0 will place added emphasis on integrating the patient view point throughout practice quality improvement work. This year, the participation in the collaborative requires the recruitment of 2 Patient Partners per practice team, and Patient Partner participation in 50% of PCR in office "team meetings."

### **Patient Partner Role:**

The role of the Patient Partners on your PCR practice team is to advise, confirm, and collaborate on team designated goals. Patient Partners are encouraged to share their own opinions and expertise, as well experiential knowledge from personal, family member, or friends' encounters with the health care system. Examples of this engagement include: having patient partners to pilot PHR patient portals or other new products, asking patient partners for their experience of care around specific treatments or care delivery systems, engaging your patient partners in patient outreach strategies, and vetting the design and delivery of new documents or materials through your Patient Partners. Patient Partners will receive support and training from staff at Aligning Forces Humboldt to ensure they can participate in team activities in a meaningful way. Additionally, Jessica from Aligning Forces Humboldt (AFH) will function as a "Patient Partner Practice Coach" to help support the relationship between Patient Partners and practices, and support the team in meaningful patient engagement.

### **Patient Partner Expectations:**

- Patient Partners will attend PCR Meetings (to receive a stipend, Patient Partners must attend 5 of 6 PCR meetings) and at least 50% of in office "team meetings."
- Patient Partners will attend an orientation meeting and additional "Patient Partner" meetings (held exclusively for patient partners) throughout the collaborative year.

- Patient Partners will offer insights and share recommendations based on the PCR team goals.
- Patient Partners will maintain open communication with a key contact from their practice team to keep the team abreast of any scheduling conflicts, concerns, etc.
- Patient Partners will complete confidentiality training and maintain confidentiality at all times during the PCR collaborative.

**Practice Expectations:**

- Practices will recruit and retain two Patient Partners to participate on their PCR team.
- Practices will ensure that at least one Patient Partner should be present at all PCR meetings (though it is highly encouraged that both patient partners attend all PCR meetings).
- Practices will coordinate with Patient Partners to arrange that a Patient Partner is present at 50% of practice “team meetings.”
- Practices will maintain ongoing connection and communication to their Patient Partners to keep them abreast of team meetings, team goals, etc.
- Open and timely communication with Jessica from Aligning Forces Humboldt to address any Patient Partner challenges that may arise.

**Support:**

Patients and practices will receive ongoing support from staff at Aligning Forces Humboldt throughout the PCR year.

*Support for Patients:*

- Orientation to the PCR project, quality improvement, and working in a multi-stakeholder team.
- On-going patient partner meetings throughout the collaborative year (6 meeting total).  
These patients-only meetings provide an introduction to topics addressed at upcoming PCR meetings and offer a supportive environment for asking questions, gaining clarification, etc.
- Resource binders with information about PCR focus areas, commonly used language and acronyms, and general information about quality improvement.

- Priority invitation to quality improvement or consumer engagement events offered by Aligning Forces Humboldt.

*Support for Practices:*

- Assistance from AFH staff in recruiting Patient Partners who are ideal fits for your team (please see recruiting document).
- Assistance from AFH staff in mitigating any challenges or problems that arise with your patient partner.
- Patient engagement practice coaching from Jessica from Aligning Forces Humboldt to help facilitate patient participation in practice meetings.
- Additional support from AFH staff as requested by practices.

**Contact:**

Thank you for your enthusiastic participation in this project! At any time, please feel free to contact Jessica at Aligning Forces Humboldt with any questions, clarifications, or concerns:

Jessica Osborne-Stafsnes

(707) 445-2806 ext. 2.

[jessica@communityhealthalliance.org](mailto:jessica@communityhealthalliance.org)

# Humboldt County, CA: Patient Engagement Roles and Recommendations | 2012

Patient Core Function Levels	Recommended Patient Role	Key Patient Characteristics	Necessary Support	Practice Readiness
1. Help individual patients better manage their own health	Partner in care	<ul style="list-style-type: none"> <li>Willing to develop self-awareness about personal role in managing health</li> <li>Receptivity to initiate better health care behaviors</li> <li>The ability to communicate with care team</li> </ul>	Offer peer-support resources such as referrals to community-based chronic disease self-management programs, group visits, etc.	Starting to view patients as partners in chronic condition management. Beginning practice redesign efforts are emerging with a willingness to support new models of care. Leadership is supportive of transformation.
2. Support individuals in becoming a leader beyond personal health. Support individuals to make more informed and better choices about their care	Partner in care	<ul style="list-style-type: none"> <li>Desire to seek and evaluate information about specific health issues</li> <li>The ability to discuss information with provider (ask questions, seek clarification, etc.)</li> <li>Desire to become peer leader or support to others.</li> </ul>	<p>Make training for peer leaders available.</p> <p>Provide access to personal health information, offer resources about specific disease states, make decision support available, etc.</p>	Beginning to implement internal process for patient self-management support. Practice documents and tracks self-management goals. Practice is receptive to working with peer leaders. Establishing systems to direct patients to decision support material.
3. Assist individuals to weigh in on patient experience (resulting in participation in quality improvement efforts)	Advisor	<ul style="list-style-type: none"> <li>Excellent communication skills</li> <li>The ability to collaborate with diverse individuals in a group setting</li> <li>Desire to increase knowledge around quality issues</li> <li>Ability to contribute and provide patient perspective during team activities</li> <li>Can focus on improving care related to team goals</li> </ul>	Offer information and training on key focus areas, ask specific questions, create a culture that values patient insight, define role parameters and desired inputs from consumers clearly.	Commitment to linking with external support that will assist your practice in working with patients in a quality improvement setting. Organizational recognition of the value of the patient voice.
4. Foster and support champion patients as equal core members of committees that drive redesign and policy efforts at the highest levels.	Advisor and Champion	<ul style="list-style-type: none"> <li>Skills listed above and:</li> <li>Good foundational understanding of key topic areas</li> <li>Ability to seek out and absorb information on complex topics on their own</li> <li>Comfortable articulating patient insight and bringing patient feedback to the forefront</li> <li>Functions in a fast-paced and technical setting</li> <li>Problem-solves in inclusive ways that addresses issues from a myriad of perspectives</li> </ul>	Create roles for a patient/patient advocate on committees, solicit patient feedback, offer educational and training opportunities.	Commitment to linking with external support or developing an internal system that will assist your practice in working with patients in a quality improvement setting. Organizational recognition of the value of the patient voice.