Promoting Person Centered Care in Systems of Care: Preference Congruence

Katherine Abbott, PhD, MGS

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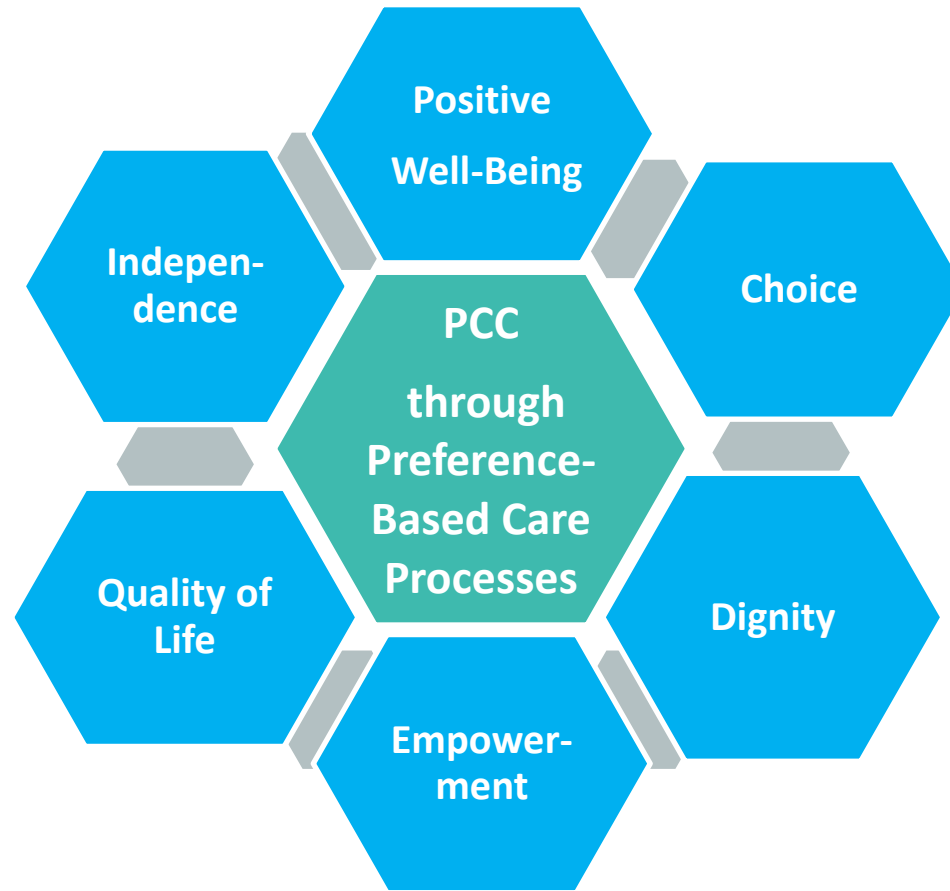## MIAMI UNIVERSITY
SCRIPPS GERONTOLOGY CENTER

Objectives

- Describe an organizational quality improvement based system designed to enhance preference congruence in LTSS
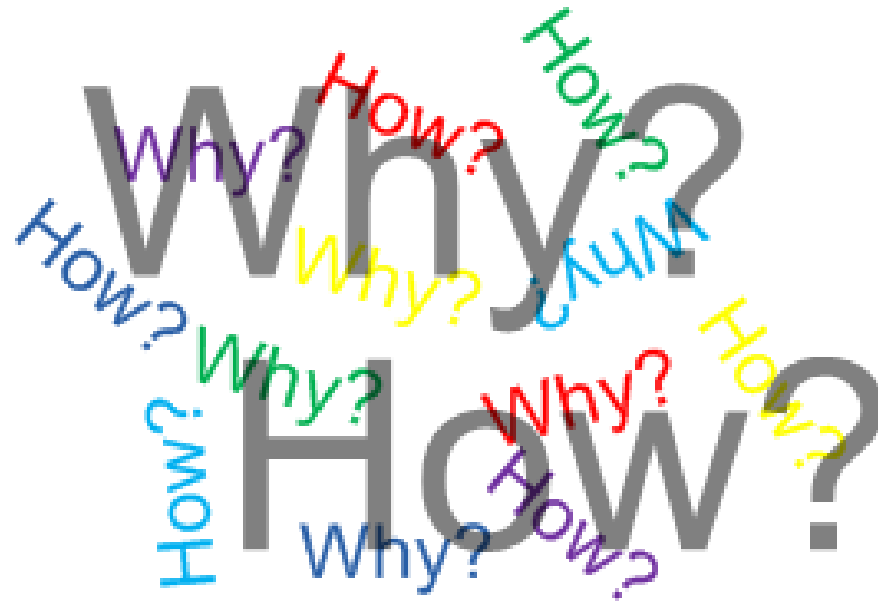
Person-Centered Care (PCC)

Honoring personal preferences are a basic component of Person-Centered Care

Benefits of Person-Centered Care

Positive Well-Being

Independence

Choice

PCC through Preference-Based Care Processes

Quality of Life

Dignity

Empowerment

- **However, the construct and measurement of preferences is poorly operationalized…**

Knowledge of preferred activities and routines provides…..

Concrete and actionable information that can be used to design person centered care goals for older adults receiving care from informal and formal caregivers within health care systems.

When preference based care is provided, we see some evidence for optimized outcomes for ....

- ## Older adults
  - Resnick, et al. (2009)
  - Palese, et al. (2010)
  - Kolanowski, et al. (2011)
  - VanHaitsma, et. al (2015)

- ## Informal caregivers
  - Passalacqua & Harwood (2012)

- ## Formal caregivers
  - Gitlin et al. (2010)

- ## Systems of Care
  - Van Haitsma et al. (2014)

Though the evidence base is growing for person centered care delivery, there is still a long way to go.

For LTSS providers, the delivery of PCC involves a highly complex set of interdependent processes

- Day to day contact between resident/client, staff and family members

- Rhythms and programs of the communities/ neighborhoods where groups of older adults reside

- Organizational compliance with federal and state regulations

Why this is an ideal time to focus on person centered care

Increased regulation: CMS Interpretive Guidelines to Providers (F-tag 309)

CMS requires nursing homes to "provide a supportive environment that promotes comfort and recognizes individual needs and preferences".

Affordable Care Act: Lower costs, better health, better patient experience

Affordable Care Act (ACA) places new emphasis on lower costs, better health outcomes, and better patient experiences of care in all settings of care.
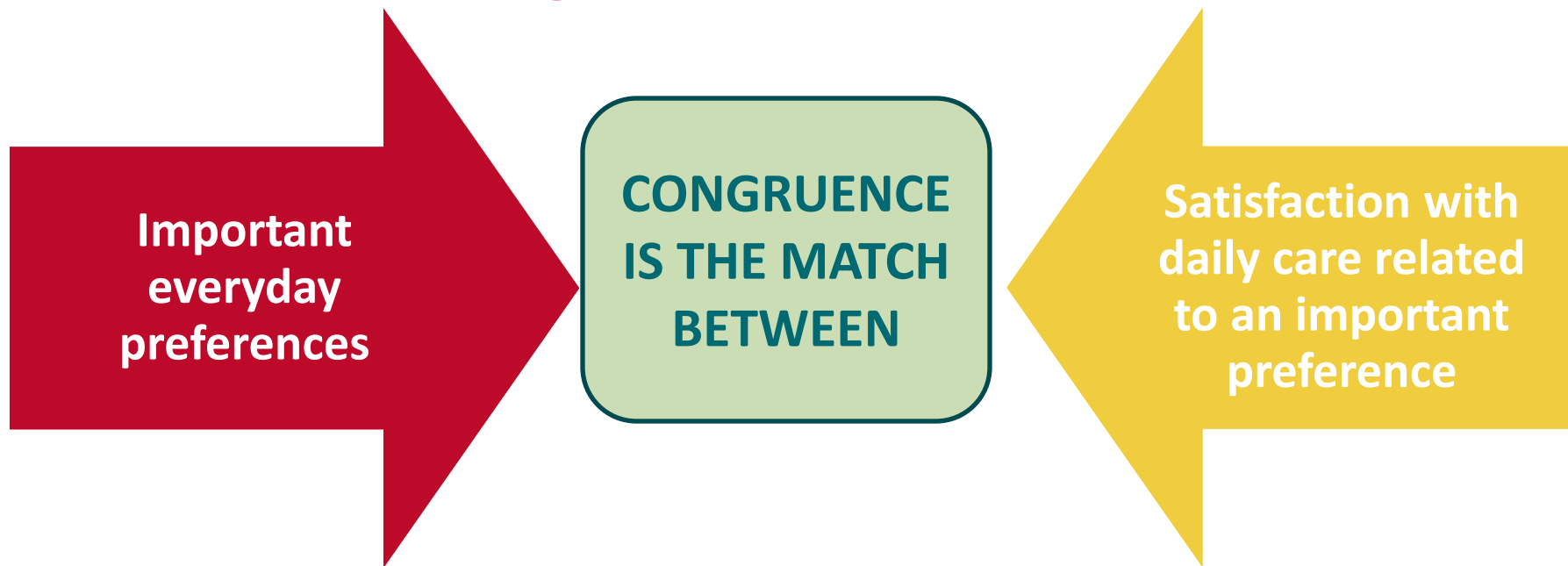
Quality Assurance Performance Improvement (QAPI)

The Affordable Care Act of 2010 requires nursing homes to have an acceptable QAPI plan within a year of the promulgation of a QAPI regulation.

Preference Congruence

- An evidence based person centered quality improvement system for LTSS providers
- Feedback to the care team in 3 areas
  - Which resident/client preferences are bring met and which require further follow up
  - Which preference gaps may be affecting many persons residing together in a household/floor/unit
  - Overall measure of quality that can be benchmarked and tracked over time

What is Preference Congruence Care?

Important everyday preferences → **CONGRUENCE IS THE MATCH BETWEEN** ← **Satisfaction with daily care related to an important preference**

How important is it to you to….. choose what time to go to bed?

How satisfied are you in being able to….. choose what time to go to bed?

Preference Congruent" care is care that *fulfills important resident/client preference for personal care and recreational activities.*

How do we measure Preference Congruent Care?

- Use the Advancing Excellence PCC Toolkit

- MDS 3.0 Section F. Preferences for customary routine and activities

  – Download the PCC Toolkit from www.nhqualitycampaign.org

How do we measure Preference Congruent Care?

- **Step 1: Interview each resident/client to discover:**

  - Which preferences are "very" or "somewhat" important

  - Which preferences resident/client rates as "important, but can't do"

  - How satisfied s/he is with each of the important preferences being fulfilled

Step 2: Record Resident Interviews in the AE Excel Workbook

Resident name	Rose
Identifier	A202
Resident's Household, Neighborhood or group name	Sunshine
Date of Interview (mm-dd-yyyy)	11/12/2013
Stay type	Long stay
Indicate primary respondent	Resident

F0400	Interview for Daily Preferences	1-Very Important 2-Somewhat Important 3-Not Very Important 4-Not Important at all 5-Important, but can't do	1-Mostly or completely satisfied 2-Somewhat Satisfied 3-Not satisfied at all	
	How important is it to you..	**Resident Response Importance**	**Resident Response Satisfaction**	**Priority**
A	Choose what clothes to wear?	1	A	1	Green
B	Take care of your personal belongings or things?	3	B	9	
C	Choose between tub bath, shower, bed bath or sponge bath?	1	C	3	Red
D	Have snacks available between meals?	2	D	2	Yellow
E	Choose your own bedtime?	5	E	9	Gray

Using PCC information to Care Plan with an Individual

- Bring Individual Preference Congruence interview results to care conference to be discussed by the entire team and immediately included in the plan of care.

- Include resident, family, and CNA in care planning meeting for best results!

- **It takes a team to match care to resident preferences!**

Preference Congruence for Groups

Neighborhood information:

– Select which neighborhood you would like to view from drop down menu

– See "at a glance" the profile of each resident who lives in a common location

– Assists in prioritizing which preferences need attention first

– Serves as a guide for care planning team in thinking about quality of care delivery for an entire household

Sample Neighborhood report: All residents who live in the same Neighborhood

Neighborhood Report

Polisher Research Institute

Household / Neighborhood / Group Name		Click on UPDATE FORM button each time the Household / Neighborhood / Group name is changed or additional interview results have been recorded.
A3		Click on PRINT REPORT button to print formatted report.

Summary of Data

Count of "Very Important" and "Somewhat Important" items per resident		14	11	14	12	15	9	14	13	15	13	9	16
% of "Very Important" and "Somewhat Important" and "Mostly or Very Satisfied"		85.7%	63.6%	85.7%		66.7%	88.9%	64.3%	84.6%	66.7%	46.2%	44.4%	87.5%
% of "Very Important" and "Somewhat Important" and "A Little or Somewhat Satisfied"		14.3%	36.4%	7.1%	75.0%	33.3%	11.1%	21.4%		33.3%	38.5%	33.3%	12.5%
% of "Very Important" and "Somewhat Important" and "Not at All Satisfied"				7.1%	25.0%			14.3%	15.4%		15.4%	22.2%	
% of Important, but Can't Do - No Choice													

Resident Data

Resident Name		AS	BR	BS	SF	MK	FG	FC	FB	AF	CG	BG	PS
Identifier		A327	A322	A304	A317	A302	A313	A319	A318	A301	A325	A314	A306
Date		5/23/2013	5/24/2013	5/16/2013	5/16/2013	5/17/2013	5/13/2013	5/14/2013	5/15/2013	5/15/2013	5/14/2013	5/15/2013	5/14/2013
Stay Type		LONG STAY	LONG STAY	LONG STAY	LONG STAY	LONG STAY	LONG STAY	LONG STAY	LONG STAY	LONG STAY	LONG STAY	LONG STAY	LONG STAY

Interview for Daily Preferences

A	choose what clothes you wear?	GREEN	GREEN	GREEN		GREEN		GREEN	GREEN	GREEN		GREEN	YELLOW
B	take care of your personal belongings?	GREEN	GREEN	GREEN	YELLOW	YELLOW	YELLOW	GREEN	GREEN	YELLOW	YELLOW	YELLOW	GREEN
C	choose between a tub bath, shower, bed bath, or sponge bath?	GREEN		GREEN	YELLOW	GREEN	GREEN	YELLOW	GREEN	GREEN	RED	GREEN	GREEN
D	have snacks available between meals?	GREEN		GREEN	RED					GREEN		RED	GREEN
E	choose your own bedtime?	GREEN		GREEN	YELLOW	YELLOW	GREEN	GREEN	GREEN	YELLOW	GREEN		GREEN
F	have your family or a close friend involved in discussion about your care?	YELLOW	GREEN	GREEN	YELLOW	GREEN		GREEN	GREEN	GREEN	GREEN	GREEN	GREEN
G	be able to use the phone in private?	GREEN		GREEN	YELLOW	GREEN			GREEN	YELLOW	GREEN		GREEN
H	have a place to lock your things to keep them safe?		GREEN			GREEN		GREEN	RED	GREEN	GREEN	YELLOW	GREEN

Interview for Activity Preferences

A	have books, newspapers, and magazines to read?		GREEN	GREEN	YELLOW	YELLOW	GREEN	YELLOW		YELLOW	YELLOW	GREEN	GREEN
B	listen to music you like?	GREEN	GREEN	GREEN	YELLOW	GREEN	GREEN	GREEN	GREEN	YELLOW	YELLOW		GREEN
C	be around animals such as pets?	YELLOW	YELLOW			YELLOW		RED	RED				GREEN
D	keep up with the news?	GREEN	YELLOW	GREEN	YELLOW	GREEN	GREEN	GREEN	GREEN	GREEN	RED		GREEN
E	do things with groups of people?	GREEN		RED		GREEN	GREEN	GREEN	GREEN	GREEN	YELLOW		GREEN
F	do your favorite activities?	GREEN	GREEN	GREEN	RED	YELLOW	GREEN	GREEN	GREEN	GREEN	YELLOW	YELLOW	GREEN
G	go outside to get fresh air when the weather is good?	GREEN	YELLOW	YELLOW	RED	GREEN	GREEN	RED		GREEN	GREEN	RED	YELLOW
H	participate in religious services or practices?	GREEN	YELLOW	GREEN	YELLOW	GREEN		YELLOW	GREEN	GREEN	GREEN		GREEN

Sample Household report:
Which Types of Preferences are most incongruent?

Results By Preference

		How important is it to you to...	Total # residents indicating this is a "very important" or "somewhat important" preference	% Mostly or completely satisfied	% A little or somewhat satisfied	% Not satisfied at all	% Important, but can't do or no choice	How are we doing...
Interview for Daily Preferences	A	choose what clothes you wear?	37	89.2%	8.1%	2.7%	0.0%	
	B	take care of your personal belongings?	41	75.6%	24.4%	0.0%	0.0%	
	C	choose between a tub bath, shower, bed bath, or sponge bath?	40	82.5%	15.0%	2.5%	0.0%	
	D	have snacks available between meals?	28	82.1%	10.7%	7.1%	0.0%	
	E	choose your own bedtime?	39	82.1%	17.9%	0.0%	0.0%	
	F	have your family or a close friend involved in discussion about your care?	47	87.2%	12.8%	0.0%	0.0%	
	G	be able to use the phone in private?	29	89.7%	10.3%	0.0%	0.0%	
	H	have a place to lock your things to keep them safe?	33	72.7%	21.2%	6.1%	0.0%	
Interview for Activity Preferences	A	have books, newspapers, and magazines to read?	39	79.5%	20.5%	0.0%	0.0%	
	B	listen to music you like?	46	82.6%	17.4%	0.0%	0.0%	
	C	be around animals such as pets?	29	55.2%	31.0%	13.8%	0.0%	
	D	keep up with the news?	34	76.5%	17.6%	5.9%	0.0%	
	E	do things with groups of people?	34	85.3%	11.8%	2.9%	0.0%	
	F	do your favorite activities?	40	77.5%	20.0%	2.5%	0.0%	
	G	go outside to get fresh air when the weather is good?	44	63.6%	27.3%	9.1%	0.0%	
	H	participate in religious services or practices?	38	84.2%	15.8%	0.0%	0.0%	

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Advancing Excellence

Measuring Person Centered Care for the Entire Community

March – June 2013		
Preference Congruence	Long Stay	Short Stay
Number of Residents Tracked this month	80	49
Percent of Resident Preferences "Very Important" or Somewhat Important AND "Mostly or Completely Satisfied	67%	79%

Overall Preference Congruence by Stay type

Long Stay

33%

67%

Short Stay

17%

4%

79%

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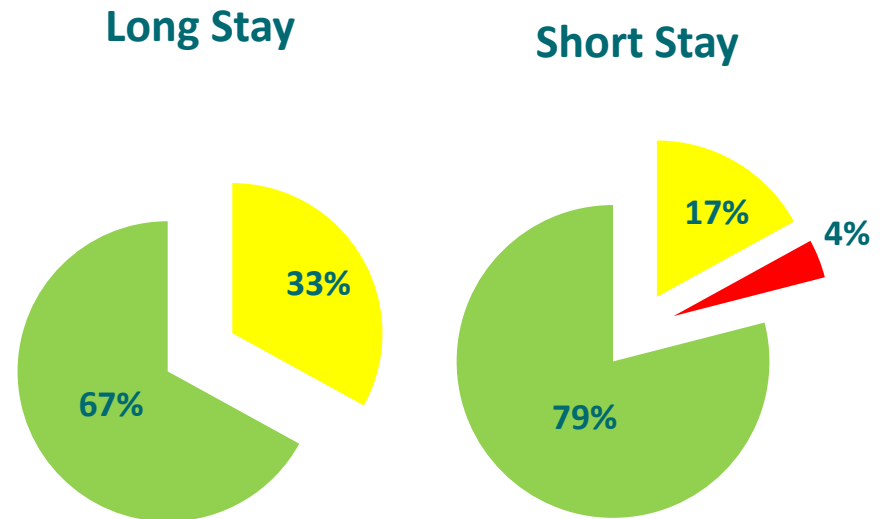
Care Conference

Step 3:
A Record priority attendees at each care conference this month.

	Resident Name	Stay Type Long Stay/Short Stay	Date Care Conference Occurred MM/DD/YY	Priority Attendees			If Priority Attendees were Not Present, were the reasons explored?	No
				Did the **Resident** Attend?	Did Resident's **Family Member and/or Friend** Attend?	Did Resident's **CNA/Direct Care Staff Member** Attend?		
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Resident's Name
Please type your resident's name.

Welcome | Common Qs & As | ListNeighborhoods | RecordInterviews | IndividualReport | NeighborhoodReport | ResultsByPreference | **CareConference** | OptimizedCarePlanning | DataforW

READY

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Optimized Care Planning

This Resident				Optimized Agenda					
				Interview	Great Ideas	Tools & Resources	ACP Resources		
Resident Name automatic	**Stay Type** automatic	**Date Care Conference Occurred** automatic	Is this the **same** Direct Care Staff Member Present as Previous Care Conference?	**Was the Resident Preference Satisfaction Interview completed _PRIOR_ to meeting?**	**Were the results of the Resident Preference Interview reflected in revised care plan?** For example, were the 3 most important preferences listed? Were the Red areas addressed?	**Was the Care Plan Written in the Resident's Voice?** For example, using "I" statements	**Is the Resident's Advance Care Plan Accessible AND Current?**	**Were Solutions Agreed Upon to Address ALLGaps Between Resident Preferences and Care?**	
r1									
r2									
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Welcome | Common Qs & As | ListNeighborhoods | RecordInterviews | IndividualReport | NeighborhoodReport | ResultsByPreference | CareConference | **OptimizedCarePlanning** | DataforWebsiteEntry | AllResidentsIntervi ...

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Implementation Manual provides information to providers about ...

- Strategies for doing the Preference Congruence Assessment
  - ❖ <u>WHO</u> does the interviews
  - ❖ <u>WHEN</u> and <u>How Often</u> to do the interview
  - ❖ <u>WHERE</u> to do the interview
  - ❖ Tips for overcoming common barriers encountered when interviewing older adults
  - ❖ Assembling your core team
  - ❖ Doing a staged implementation process
  - ❖ Training your staff

Implementation Manual provides information to providers about …

- Strategies for approaches to meet resident preferences that are incongruent…..
  - ❖ Types of evidence based interventions to consider
  - ❖ Suggestions for modifying activities to accommodate sensory, cognitive and functional impairments
  - ❖ And many other tips…..

Why should a long term care provider consider using the PCC Tool?

- **Feedback from Pilot Communities**

Recent Article Summarizing the Pilot Study

JAMDA

journal homepage: www.jamda.com

Quality Improvement in Long-Term Care

New Toolkit to Measure Quality of Person-Centered Care: Development and Pilot Evaluation With Nursing Home Communities

CrossMark

Kimberly Van Haitsma PhD [a,*], Scott Crespy PhD [b], Sarah Humes MA [b], Amy Elliot PhD [c], Adrienne Mihelic PhD [d], Carol Scott BS [e], Kim Curyto PhD [f], Abby Spector MMHS [g], Karen Eshraghi MSW [a], Christina Duntzee BS [a], Allison Reamy Heid PhD [a], Katherine Abbott PhD, MGS [a]

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Why Should a Provider Use the PCC Tool?

- Increases the understanding of Person Centered Care
- Increases awareness and communication of resident/client preferences
- Enhances quality of resident/client & Staff Relationships
- Enhances quality of care conferences

Why Should a NH Provider Use the PCC Tool?

- The tool facilitates a nursing home's compliance with QAPI guidelines and serves as a specific Performance Improvement Program (PIP)

- Provides direct feedback on where the community is doing well and what can be an opportunity for improvement.

- Provides a way to track a nursing home's PCC levels over time so that early declines can be identified, analyzed and specific issues can be addressed.

Walk through Website

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Person-Centered Care: Advancing Excellence's Circle of Success

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ADVANCING EXCELLENCE
IN AMERICA'S
NURSING HOMES

OUR MISSION

Making nursing homes better places to live, work and visit

OUR VISION

Every nursing home resident in America experiences person-centered quality of life as a result of a stable and empowered workforce, dedicated to improving clinical and organizational outcomes, and engaging in open communication and transparency.

Supporting Members

WHO WE ARE

ADVANCING EXCELLENCE
IN AMERICA'S NURSING HOMES

GOLD

Kimberly-Clark

eHEALTH DATA SOLUTIONS
Better Data. Better Decisions.

It's Never 2 Late
Dignity through technology

MEDLINE

Harmony Healthcare INTERNATIONAL

WHO WE ARE

ADVANCING EXCELLENCE
IN AMERICA'S NURSING HOMES

Provider Members

THE EVANGELICAL LUTHERAN
Good Samaritan Society®
In Christ's Love, Everyone Is Someone.

Jewish Home Lifecare

HI'OLANI CARE CENTER
AT KĀHALA NUI

PARKER JEWISH INSTITUTE FOR
HEALTH CARE & REHABILITATION

ProMedica GOERLICH CENTER
Alzheimer's and Dementia Care

Individual Members

Theresa Schmidt, BA, MA
Dheeraj Mahajan, MD, CMD, CIC
Dayne DuVall, LMT, CAEd, CRTS
Rita Morris, Family Member

Quality Measure Information on AE website

Long-Stay Residents With One or More Falls With Major Injury
Missouri

Registering & Participating

REGISTRANTS:

Sign up, select 2 goals (one from each category)
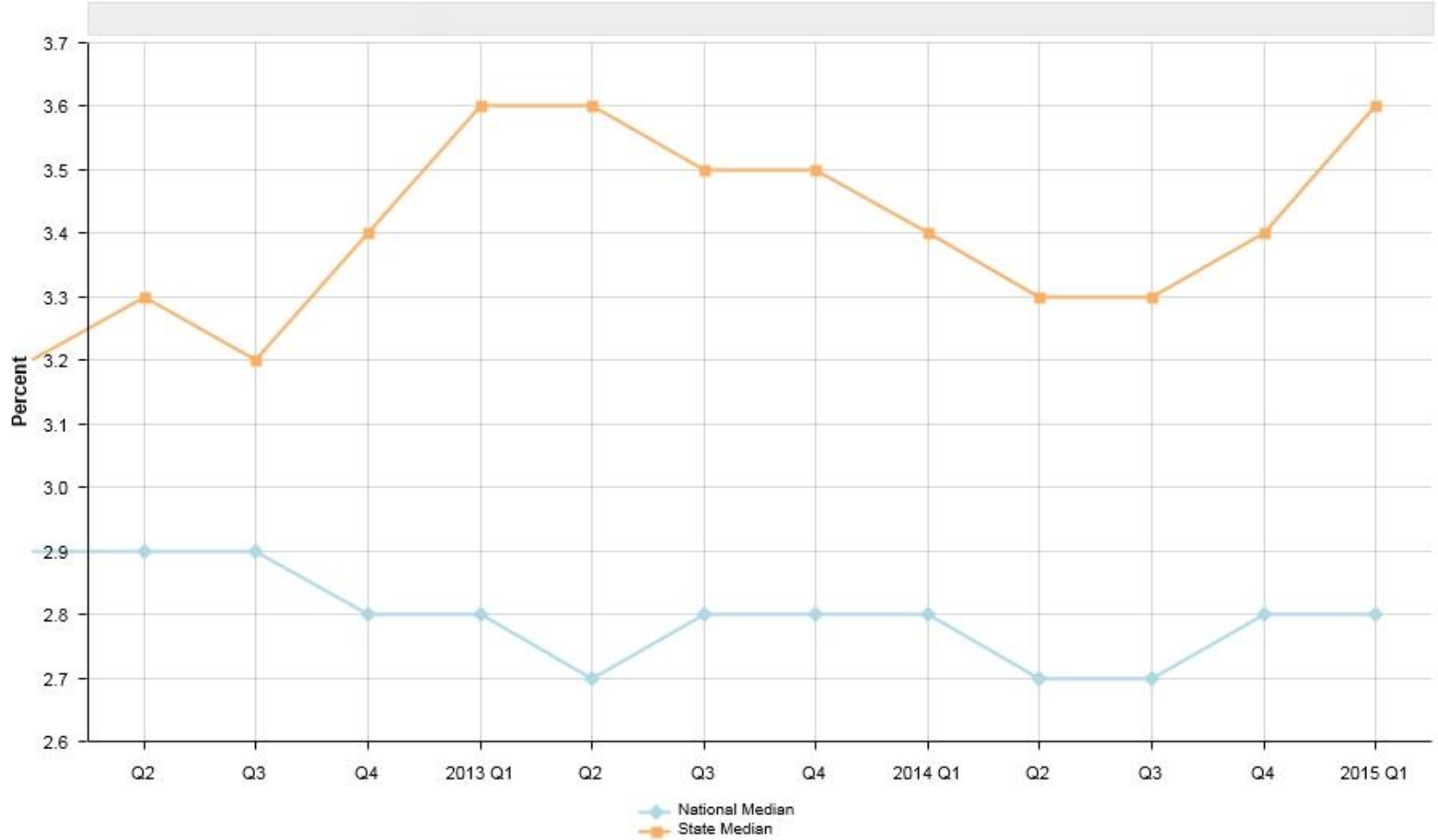
| Hospitalizations | Staff Stability | Pressure Ulcers | Medications Antipsychotics | Consistent Assignment | Infections C. difficile | Mobility | Person-Centered Care | Pain Management |

PARTICIPANTS:

Demonstrate commitment to performance improvement by uploading data to AE website monthly for 6 consecutive months for 2 goals

www.nhqualitycampaign.org

WHO
WE
ARE

ADVANCING
EXCELLENCE
IN AMERICA'S
NURSING HOMES

Of Nation's Nursing Homes ...

9,902 (63.3%)
Registered since 2006

4,530 (28%)
Currently registered in AE Campaign

Selected 2 or more goals

846
Participating homes
Entered 6 months of data
on AE website

4,004
Consumers

4,487
Nursing Home Staff Members

52
State-Based LANEs

FIND NURSING HOMES

| Registered | Provisional Participant | In Progress Participant, Inactive | In Progress Participant, Active | Full Participant, Inactive | Full Active Participant |

What is Participation? ▲

	Select Goals	Monitor your QI Project	Enter Monthly Outcomes on the AE Website			
Participation Status **Read More**	• Register • Prioritize • Choose 2	• Watch This! (6 minutes) • Get Tracking Tools • Get QI Resources	3 Consecutive Months (current) on an Organizational Goal	6 Consecutive Months on an Organizational Goal	6 Consecutive Months on an Clinical Goal	Currently Entering Data data entered consistently over the most recent 6 months
Active Full	●	●		●	●	●
Inactive Full	●	●		●	●	
Active In Progress	●	●		●		●
Inactive In Progress	●	●		●		
Provisional	●	●	●			

Good to Know

Read More

The Domestic Lean Goddess - PDSA Video

Without data you're just another person with an opinion.

W. Edwards Deming

Circle of Success

How do I know where I am?

Where do I want to be?

What processes are associated with my outcome?

When I change a process, how do I know it had the effect I wanted?

How am I doing compared to other nursing homes working on this goal?