

Engagement Behavior Framework*

What is the full range of actions individuals are now expected to do if they are to optimally benefit from their health care? The CFAH Engagement Behavior Framework assembles a comprehensive list of measurable behaviors that individuals and/or their caregivers must perform in order to maximally benefit from health care.

Identifying and then measuring specific behaviors is the most effective way to drive quality improvement efforts. To borrow a phrase from that movement, “what gets measured gets done.”

1 Find Safe, Decent Care

- Find provider(s) who meet personal criteria (e.g., performance, cost, geographic access, personal style), will take new patients and accept personal insurance
- Use all available comparative performance information (including cost data) to identify prospective providers
- Establish a relationship with a health care professional or group
- Use all available comparative performance information (including cost data) to identify prospective health care facilities
- Seek and use the appropriate health care setting when professional attention is required

2 Communicate with Health Care Professionals

- Prepare in advance of appointments a list of questions and issues for discussion with the health care professional
- Bring a list of all current medications (including supplements and alternative products) and be prepared to discuss their benefits and side effects
- Report accurately on the history and current status of physical and mental symptoms
- Ask questions when any explanations or next steps are not clear and express any concerns about recommendations or care experiences

3 Organize Health Care

- Make appointments; inquire about no-show policies; arrive on time
- Assess whether the facility can accommodate unique needs (e.g., physical navigation, hearing or visual impairment, translation services) and arrange for assistance
- Bring documentation of health insurance coverage
- Bring another person to assist if the patient is frail, confused, unable to move around or unable to remember the conversation with the provider
- Bring a summary of medical history, current health status and recent test results to visits as appropriate
- Ensure that relevant medical information is conveyed between providers and institutions
- Obtain all test results and appointment records and maintain personal health record

4 Pay for Health Care

- Compare coverage options; match to personal values, needs and preferences; and select coverage
- Gather and submit relevant eligibility documentation if applying for or seeking to maintain public insurance (e.g., Medicaid, Medicare, SCHIP); compare coverage options if applicable; match to personal values, needs and preferences; and select affordable, quality coverage
- Before seeking treatment, ascertain benefit coverage restrictions or incentives such as mental health benefits limitations, pre-certification requirements, access restrictions to specialists or adjunct health providers, and variables in co-pays for specific types of care or providers
- Maintain or adjust coverage in the event of changes in employment, eligibility or family status (i.e., job change, marriage, divorce, birth of child)
- Maintain all receipts for drugs, devices and services; submit any documentation of services or payments upon request or as needed for third-party payers (e.g., private insurance, medical/flexible health savings accounts or public payers)

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5 Make Good Treatment Decisions

- Gather additional expert opinions on any serious diagnosis prior to beginning any course of treatment
- Ask about the evidence for the efficacy (risks and benefits) of recommended treatment options
- Evaluate treatment options
- Negotiate a treatment plan with the provider(s)

6 Participate in Treatment

- Learn about any newly prescribed medications and devices, including possible side effects or interactions with existing medications and devices
- Fill or refill prescriptions on time, monitor medication effectiveness and consult with prescribing clinician when discontinuing use
- Maintain devices
- Evaluate and receive recommended diagnostic and follow-up tests in discussion with health care providers
- Monitor symptoms and conditions (e.g., for diabetes — monitor glucose regularly, check feet; for depression — medication and/or counseling and monitor symptoms; for hypertension — measure blood pressure regularly, maintain blood pressure diary), including danger signs that require urgent attention

7 Promote Health

- Set and act on priorities for changing behavior to optimize health and prevent disease
- Identify and secure services that support changing behavior to maximize health and functioning and maintain those changes over time
- Manage symptoms by following treatment plans, including diet, exercise and substance use agreed upon by them and their provider

8 Get Preventive Health Care

- Evaluate recommended screening tests in discussion with health care provider
- Act on referrals for early detection screenings (e.g., breast cancer, colon cancer), and follow up on positive findings
- Get recommended vaccines and participate in community-offered screening/wellness activities as appropriate

9 Plan for the End of Life

- Complete advance directives and medical power of attorney; file with personal records
- Discuss directives with family physician and other health care providers, appropriate family and/or significant others
- Review documents annually; update and distribute as needed

10 Seek Health Knowledge

- Assess personal risks for poor health, disease and injury, and seek opportunities to increase knowledge about health and disease prevention
- If diagnosed with a chronic disease, understand the condition(s), the risks and benefits of treatment options and personal behavior change(s) by seeking opportunities to improve health/disease knowledge
- Know personal health targets (e.g., target blood pressure) and what to do to meet them

* Gruman J, Holmes-Rovner M, French ME, Jeffress D, Sofaer S, Shaller D, Prager DC. From patient education to patient engagement: Implications for the field of patient education. *Patient Education and Counseling*. March 2010 (Vol. 78, Issue 3, Pages 350-356, DOI: 10.1016/j.pec.2010.02.002)