Coaching to Support Kidney Care Choices

Coaching Fundamentals

March, 2019

Expand skills. Share Knowledge. Empower Patients.
What will be covered in this Module?

- Part 1: Importance of Being a Patient Health Coach
- Part 2: Effective Communication Strategies
- Part 3: Coaching Guidelines
- Part 4: Program Guidelines
- Part 5: Tips and Suggestions
Learning Objectives

At the completion of this activity the participant will be able to:

• List the ESRD Network roles and responsibilities
• Understand how your role as a Patient Health Coach will make a difference.
• Describe how you can provide a facility leadership role with patients
• Discuss effective communication strategies and techniques
• Understand the importance of keeping patient information confidential
• Describe how Patient Health Coaches can be effective
• Share with others an overview of the Patient Health Coach Program and how these skills can be utilized by team members at your facility
ESRD Networks

Puerto Rico and Virgin Islands are part of Network 3
Hawaii, Guam, American Samoa are part of Network 17
ESRD Network Structure

Centers for Medicare & Medicaid Services (CMS)

• Sets goals to improve the care of patients in ESRD

18 ESRD Networks

• Works with facilities and patients in their region to design programs to help reach regional and national improvement goals

ESRD National Coordinating Center

• Works with ESRD Networks, CMS, and Patient Subject Matter experts to support the goals and share information on a national level
Network Role and Responsibilities

ESRD Networks are critical to achieving CMS goals for healthcare transformation and improving the patients experience of care by:

• Being leaders, motivators, and organizers
• Producing partnerships and collaboration within the ESRD community
• Promoting outreach and education
• Collecting, analyzing and monitoring data to measure achievement
• Collecting and sharing best practices
• Providing emergency preparedness services for the ESRD community
• Support patients and facilities in resolving grievances
Centers for Medicare & Medicaid Services (CMS) Goals

ESRD Networks are tasked by CMS to support the achievement of national quality improvement goals and statutory requirements by aligning Network activities with the following CMS goals.

• Goal 1: Empower patients and doctors to make decisions about their health care
• Goal 2: Usher in a new era of state flexibility and local leadership
• Goal 3: Support innovative approaches to improve quality, accessibility, and affordability
• Goal 4: Improve the CMS customer experience
Part 1: The Importance of Being a Patient Health Coach
What is Patient Health Coaching?

- Effective patient education method.
- Assist patients in making their own healthcare decisions based on their needs.
- The Patient Health Coach and patient relationship is a structured, accountability partnership focused on the overall health and outcome goals.
Why is the “Patient Health Coach” so Important?

YOU are in a unique position to be:

• Viewed as an expert
• A trusted partner in the patient’s care
• Encouraging patients to be engaged and active in his or her care decisions
• A resource provider for educational materials
• Encouraging patients to feel safe to openly discuss questions or concerns with you and other members of their healthcare team
• Celebrating with the patient as they take each step toward better health on their ESRD journey

“Tell me and I forget, teach me and I may remember, involve me and I learn.”
Benjamin Franklin
Your Role as a Patient Health Coach

Patient Health Coaches use shared decision making strategies to:

• Empower patients with the knowledge needed to better manage their kidney disease.
• Present patients with new ideas, and encourage patients to move beyond their comfort zone.
• Provide patients who are struggling with life changes related to managing a chronic illness with the opportunity to discuss their concerns.
• Identify ways to create an individualized healthcare plan that includes the patients values and preferences.
How Coaches Help Patients Get Involved

- **Listen to Patient Concerns**
  - Learn about the patients values, interest, and goals

- **Provide Educational Resources**
  - Discuss ideas or questions patients may want to pursue with their healthcare team

- **Explore opportunities for patients to be become more involved in decisions about their care.**

- **Help to build communication between patients and care team**

- **Provide information to help patients make important decisions**

- **Help patients understand the benefits of being involved in their care**
How is Coaching Similar to Being a Leader?

• Being a leader means defining and exhibiting moral and ethical courage and setting an example for patients and coworkers. Being a leader forces you to analyze your own strengths and weaknesses.

• Patient Health Coaches like good leaders work together with others as a team to achieve common goals.

Questions to think about:

• What does it mean to be a good leader?
• Can you think of a leader you have admired?
• What qualities do you admire most about the leader you’re thinking of?
Leadership Qualities and Actions of a Patient Health Coach

Coaching in Action!

- Coaches provide education and support opportunities to the individual patient.
- Help patient’s to take positive steps in managing their care.
- Encourage patient’s to develop self-management skills.
- Share information and resources to help support patients in their health care choices.
- Don’t give medical advice, instead help connect them with the right care team member to help them discuss their options.
Coaching is a Rewarding Experience

Many Coaches say that the benefits they gain are just as great as those for their patients!

Helps you identify your individual strengths and professional growth opportunities

Improves your relationship with patients and the healthcare team

Better understand other cultures and have a greater appreciation for diversity

Feel more empowered in your role within your Facility

Improve your communication and leadership skills

Being a coach also helps YOU!
Part 2: Effective Communication Strategies
What is Communication?

The ability to communicate effectively is an essential skill in today’s world. Communication is a dynamic process and how you communicate can positively and negatively affect the relationships you have in your work and life.

Communication is the exchange of thoughts, messages or information.

Using effective communication skills will help you become a successful Patient Health Coach!

- Practice active listening
- Understand Cultural Diversity
- Set the stage for good conversation
How Do We Communicate?

We communicate in other ways than just our words:

• Tone of voice
• Body language
• Gestures
• Attentiveness
• Facial expressions

TIP: Being aware of other forms of communication can be very helpful in building relationships with your patients!
What is “Active Listening”? 

“Active Listening” means being deeply engaged in and attentive to what the speaker is saying. Your goal as an active listener is to truly understand the patient’s perspective (regardless of whether you agree) and to communicate that understanding back to the patient so that he or she can confirm the accuracy of your understanding.

Active listening is all about building rapport, understanding and trust.

Are you a good listener?
“Active Listening” Skills

- Clarify
- Withhold Judgement
- Paying Attention
- Reflect
- Summarize
- Minimal Encouragers / “I” Messages
- Redirect
- Share/Give Feedback

Withholding judgment, paying attention, reflecting, summarizing, clarifying, giving feedback, and minimal encouragers are key components of active listening.
Using Active Listening Techniques When Coaching Patients

Key active listening techniques that will guide you with listening to patients, and also make them feel as though you are hearing what they say.

1. Pay Attention
2. Ask open-ended questions.
3. Ask probing questions.
4. Request clarification.
5. Paraphrase.
6. Be attuned to and reflect feelings.
7. Summarize.

Focus on **empathy, not sympathy.**

**Empathy** - the ability to understand and share the feelings of another

**Sympathy** - feelings of pity and sorrow for someone else’s misfortune
Communication Blockers

“Interrupting”
Shows you aren’t interested in what the patient is saying

“Judging”
Forming your own opinion or conclusion

“Advising”
Offering your suggestions about what the patient should/shouldn’t do

“Diagnosing”
You identify what you think may be a patient’s illness or problem

“Patronizing”
Appearing to be kind or helpful but portraying a sense of superiority

“Cross Examining”
Questioning a patient aggressively or in great detail

“Condemning”
Expressing your disapproval of what a patient has said

“Tuning Out”
Ignoring what the patient is saying to you

“Minimizing”
Belittling or downplaying a patient’s concern

Roadblocks to Effective Communication Strategies
Communication Blocker: “You” vs. “I”

What is a “You-Statement”?

- “You never…”
- “You should…”
- “You need to…”
- “You were…”
- “Why are you…”

What is an “I-Statement”?

- “I feel…”
- “I will…”
- “I am…”
- “I would like to…”
- “I don’t…”

What is a “You-Statement”?

What is an “I-Statement”?
Communication Enhancers

The following are enhancers to effective communication strategies:

- Asking for more information and problem solving together.
- Making eye contact, leaning toward the other person, giving full attention.
- Showing empathy, validating the other person’s feelings.
- Remaining silent until the person is finished speaking.
- Withholding judgement.
- “Yes…and” statements.

**Five simple conversation courtesies:**

- “Excuse me…”
- “Pardon me…”
- “One moment please…”
- “Let’s talk about solutions.”
- “May I suggest Something?”
Aspects of Cultural Diversity

- Religion, language, physical size, gender, sexual orientation, age, disability (both physical and mental), education level, political orientation, socio-economic status, occupational status, geographical location, race and ethnicity.
- A person’s values, beliefs, practices and customs may be related to his or her culture.
- As a Patient Health Coach, you should be open to interacting with people from many different cultures.
Cultural awareness in healthcare builds mutual respect and understanding between healthcare workers and patients that increases patient trust and promotes patient responsibility and empowerment in their own healthcare.

Consider a patient’s ideas when discussing their options so that it is built around the patient’s culture and provides care that can lead to more successful and beneficial outcomes.
Part 3: Coaching Guidelines (HIPAA, PHI, PII)
What is Patient Confidentiality?

- The right of an individual to have personal, identifiable medical information kept private.
- Personal and medical information given to a health care provider cannot be disclosed to others unless the individual has given specific permission for such release.
- The Health Insurance Portability and Accountability Act (HIPAA) of 1996 requires all professionals and organizations to guard the privacy of their patients and customers.
Protecting Patient Confidentiality

- Protecting Patient Privacy and Confidentiality is critical to your role as a Patient Health Coach
- In this section we will review
  - HIPPA
  - PHI
  - PII
  - Confidentiality Do’s and Don’ts
What is the Privacy Rule for HIPAA?

**HIPAA:** The *Health Insurance Portability and Accountability Act*

- Establishes national standards to protect individuals’ medical records and other personal health information and applies to health plans, health care clearinghouses, and those health care providers that conduct certain health care transactions electronically.

- The Rule requires appropriate safeguards to protect the privacy of personal health information, and sets limits and conditions on the uses and disclosures that may be made of such information without patient authorization.

- The Rule also gives patients rights over their health information, including rights to examine and obtain a copy of their health records, and to request corrections.
What is the Privacy Rule for PHI?

**PHI:** Protected Health Information

- Protected Health Information is patient information, including demographic information, which relates to:
  - The individual’s past, present, or future physical or mental health condition,
  - The provision of healthcare to the individual, or
  - The past, present, or future payment for the provision of healthcare to the individual.

<table>
<thead>
<tr>
<th>Protected Health Information Identifiers</th>
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<tbody>
<tr>
<td>Name</td>
</tr>
<tr>
<td>Address</td>
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<tr>
<td>Birth Date</td>
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<tr>
<td>Social Security Number</td>
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What is the Privacy Rule for PII?

**PII:** *Personally Identifiable Information*

- Personal Identifiable Information means an individual's first name or first initial and last name in combination with any one or more of the following data elements, when either the name or the data elements are not encrypted.

<table>
<thead>
<tr>
<th>Personally Identifiable Information Identifiers</th>
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<tbody>
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<td>Home Address</td>
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<td>Email Address</td>
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<tr>
<td>Telephone Number</td>
</tr>
<tr>
<td>Log in Details/Password</td>
</tr>
<tr>
<td>Country, State, City, Zip code</td>
</tr>
<tr>
<td>Gender, Race, Job Position &amp; Workplace</td>
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Patient Health Coaches must uphold all HIPAA Privacy Rules

• Under the "Minimum Necessary Standard," the Patient Health Coach should not use or disclose protected health information when it is not necessary.

• This means that the Patient Health Coach can share the patient’s health information only with someone who needs to know it (i.e. other members of the patient care team related to the treatment of ESRD).

• Do NOT share PHI or PII with other patients or family/friends.

• Never leave written PHI or PII about patients anywhere that another person may see it.

• Do NOT ask for more PHI or PII than you need to help with the patients kidney care choices.
Joe, a Patient Health Coach, is reviewing different types of vascular access with Sally. Sally mentions how hard it is to park at her surgeon’s office which, as it turns out, is in Joe’s neighborhood. They discover Sally lives around the corner from Joe, and her kids go to the same school as Joe’s.

At the next parent-teacher conference, Joe notices one of Sally’s children is in his son’s class. Joe mentions to the teacher that one of the other parents, Sally, is a dialysis patient at the clinic where he works.
Was it Ok for Joe to Share this Information?

NO!

This would be considered a HIPAA violation

• Joe shared protected health information when he told the teacher that Sally is on dialysis. Sharing this information is not necessary for Sally’s healthcare.

• The consent form that Sally signed does not give permission for anyone to share with the teacher the fact that Sally is a dialysis patient.
Confidentiality Do’s and Don’ts

**DO**

- Treat patients’ personal information as you would like your own information to be treated.
- Direct questions or conversations about other health issues to the healthcare team.
- Stop your patient if he or she begins to share PHI that you do not need.

**DON'T**

- Ask questions that aren’t relevant to your topics.
- Don’t discuss patients in public areas or with friends and family.
- Leave patient information or files easily accessible.
- Look up a patient’s medical record without a valid reason.
Part 4: Program Guidelines
Program Guidelines Introduction

- Learn the design of the program through the steps outlined in this section.
- Understand the tools that will help you Coach.
- Start to think about how best to share information.
- Know your support system at your facility.
Getting Ready

Prepare your Materials

• For each quality improvement activity there is a group of materials called a “toolkit” that will help educate patients and guide your conversations.

• Print copies of the tools and resources you will need for coaching in your focused area from the Network 6 website at: https://network6.esrd.ipro.org/

• Review the tools and plan how you would like to share this information with patients.
Understanding the Toolkit

Overview of Topic Specific Focused Area

Decision Making Tools

Planning or Process Guide
Sharing the Toolkit

Does the patient have educational resources? *Share overview of topic specific focused area handout*

Does the patient need more information? *Share decision making tools that provides more details and address common questions and concerns*

Is the patient ready to make a kidney care decision? *Share the process/planning guide.*
Initial Discussion

- Ask if it is a good time to talk with the patient.
- Sit at the same level as the patient and make eye contact.
- Start the conversation with an outline of what you wish to speak with them about that day and be prepared to listen.
- Take time to stop and make sure they understand everything being discussed.
- Ask the patient to repeat back what they’re taking away from your discussion.
Following Up

Check in with the patient to see if he or she has questions or concerns about the information you reviewed.

- Direct medical questions to the healthcare team.
- Provide additional resources.
- Follow-up every 15 – 30 – 45 – 60 days.
- Re-evaluate your approach on how to improve your follow-up system.
- BE POSITIVE!
Part 5:
Tips and Suggestions
Tips for Success

• Know your role as a Patient Health Coach, and keep your conversations focused on topics related to your role.
• Avoid talking about confidential issues, and respect others’ rights to confidentiality.
• Keep private all information you know about a patient.
• Accept people for who they are, and do not try to change what they believe or choose.
• Keep an open mind to differences and avoid judgment of others.
• Always suggest that the patient talk with their healthcare team if they have medical questions.
Tips for Active Listening

**DO**
- Listen more than you talk
- Let the speaker finish before you respond
- Ask open-ended questions
- Remain attentive to what’s being said
- Be aware of your own biases
- Manage your own emotions
- Be attentive to ideas and problem-solving opportunities
- Give verbal and nonverbal messages that you are listening
- Listen for both feelings and content

**DON’T**
- Dominate the conversation
- Interrupt
- Finish the speaker’s sentences
- Jump to conclusions
- Respond with blaming or accusatory language
- Become argumentative
- Demonstrate impatience or multitask
- Listen with biases or shut out new ideas
- Mentally compose your responses about what to say next
Tips for Your Coaching Program

Patient Health Coaching Programs are a very rewarding experience. However, as fulfilling as successes will be, there may also be challenges.

Here are some ideas to help you along the way:

• Stay connected with your team and the ESRD Network for support.
• Be patient with yourself and the patient.
• Know that you may not be able to reach every patient, and that is OK!
• Be proud of trying to make a difference.
• Ask the healthcare team to assist the patient when needed.
• Talk with your facility administrator or point of contact to think through challenges and brainstorm ideas on how to improve your approaches.
Coaching Tips for Cultural Diversity

As a Patient Health Coach, your role is to:

- Respect cultural differences.
- Understand that everyone comes from diverse backgrounds.
- Acknowledge that differences are OK.
- Do not assume what someone’s culture or ethnic group is based on how they look.
- Avoid jumping to conclusions based on someone’s culture.
- Accept that everyone has the right to their own values and thoughts.
- Create a non-judgmental environment.

Everyone has different life experiences, values and perspectives.
Where Can I Go for Support when Planning my Schedule?

In your new Patient Health Coach role, you will have support from:

• Facility Leadership
• Your ESRD Network

Plan your schedule:

• Talk with your Facility Management to develop your approach to Coaching and Educating patients.
• Start to Coach patients!
Some important additional resources

Below are some of the organizations that have additional resources that can help you and the patients learn more about home dialysis options.

- The ESRD National Coordinating Center – [https://esrdncc.org/](https://esrdncc.org/)
- Home Dialysis Central – [https://homedialysis.org/](https://homedialysis.org/)
- United Network for Organ Sharing (UNOS) – [https://www.unos.org/](https://www.unos.org/)
- My Life My Dialysis Choice - [www.mydialysischoice.org](http://www.mydialysischoice.org)
- American Association of Kidney Patients – [https://aakp.org/](https://aakp.org/)
Celebrate Every Success!

• Continue to talk with the patient about how things are going and provide additional information as needed.

• Always encourage the patient to discuss barriers or issues with the healthcare team.

• Always respect what the patient wants. Their actions do not reflect you or what you are trying to accomplish as a Patient Health Coach.

• Remember you are there to help the patient get information about an important kidney care choice.

Track and celebrate each patients’ successes in making a kidney care choice!
Next Steps

• Complete the Coaching Fundamentals Module review quiz.
• Share your success with your facility management.
• Take additional modules to improve your knowledge on other topics and grow your Patient Health Coach status.
  – Home Dialysis as a Treatment Option, Transplant, Vascular Access
  – Print educational resources from each module
  – Familiarize yourself with the resources
• Develop a plan to share your knowledge with patients.
• Be ready to coach patients at your facility, providing education on Kidney Care Choices.

Begin Coaching Patients!
Celebrate each success you have in talking with your patients, because with each interaction you are making a difference.

Thank you for your hard work and commitment to helping others!
You have completed the Coaching Fundamentals Professional Module!