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# The Disease Management Colloquium

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*The Leading Forum on Innovations in Chronic Care and Disease Management*

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## **Self Management: A New Watchword in American Healthcare**

Michael R. Solomon, MBA

Point-of-Care Partners;

University of Phoenix Online

Tuesday, May 8, 2007: 11:00 – 12:00

# Key Concepts

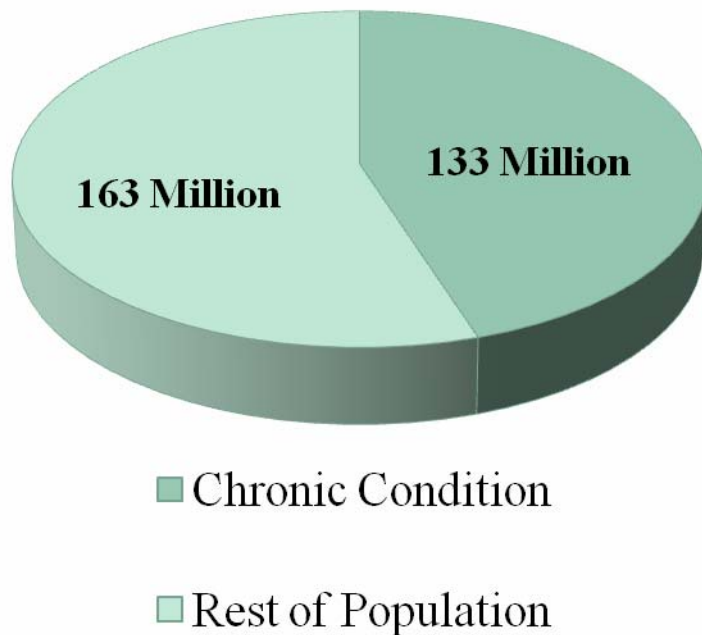
- Self-management of individuals' chronic illnesses is a major component of the health care system's response to this large and growing problem
- Recognizing self-management capabilities as a determinant of quality is a catalyst for the broad diffusion of self-management tools
- An evidence-based taxonomy of requirements provides a blueprint for developing web-based tools to support self-management capabilities and quality improvement

# Our Roadmap

- Chronic disease management in the United States: A systems perspective of the problem
- Self-management: Definition, significance, and barriers
- Self-management as an intermediate measure of quality improvement: A catalyst for change
- A Requirements Taxonomy for Self-Management Tools
- Applying the Requirements Taxonomy

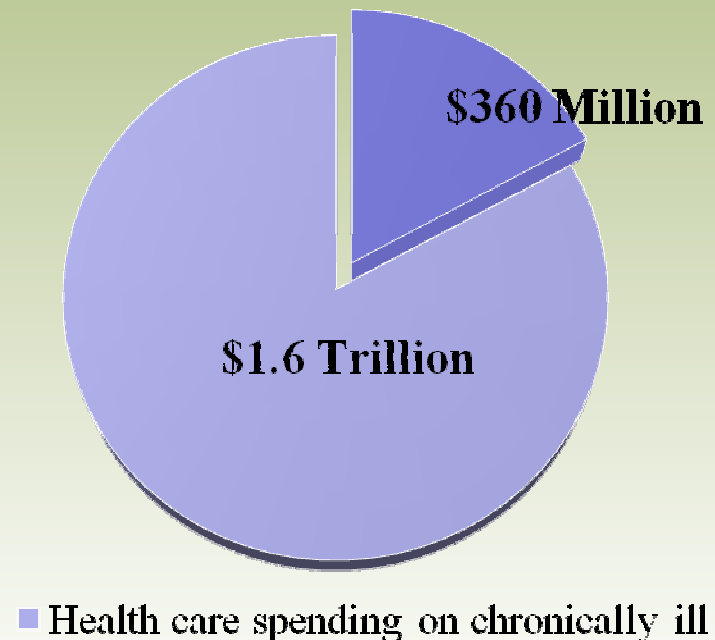
# A Large and Growing Problem in the U.S....

## U.S. Population with Chronic Medical Conditions



Sources: Partnership for Solutions, John Hopkins University;  
U.S. Census Bureau

## U.S. Health Care Spending on the Chronically Ill

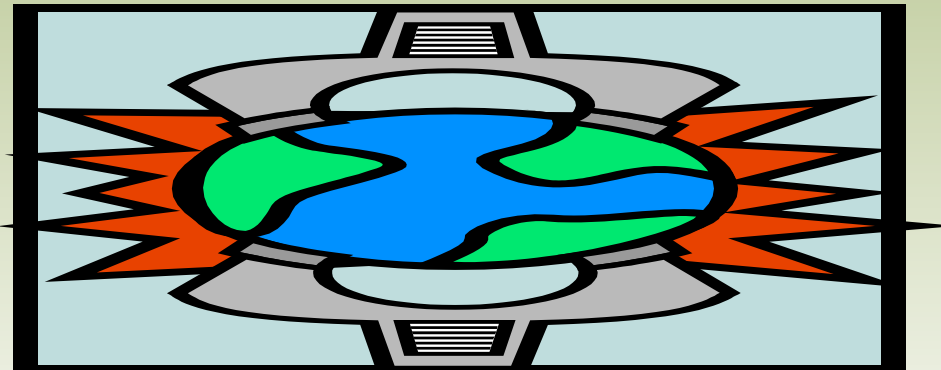


Sources: Partnership for Solutions, John Hopkins University;  
*Health Affairs*, 26, no. 1 (2007): 142-153

# ...and Indications of a Health Care System Under Stress

## Patients

- Dissatisfied with coordination of care
- Unmet needs for support with health management
- Challenged with self-reporting



## Primary Care Providers

- Gap between patient expectations and provider capabilities
- Not compensated for coordinating care or self-management support
- Under increasing pressures for accountability

## Managed Care Organizations' Disease Management Programs

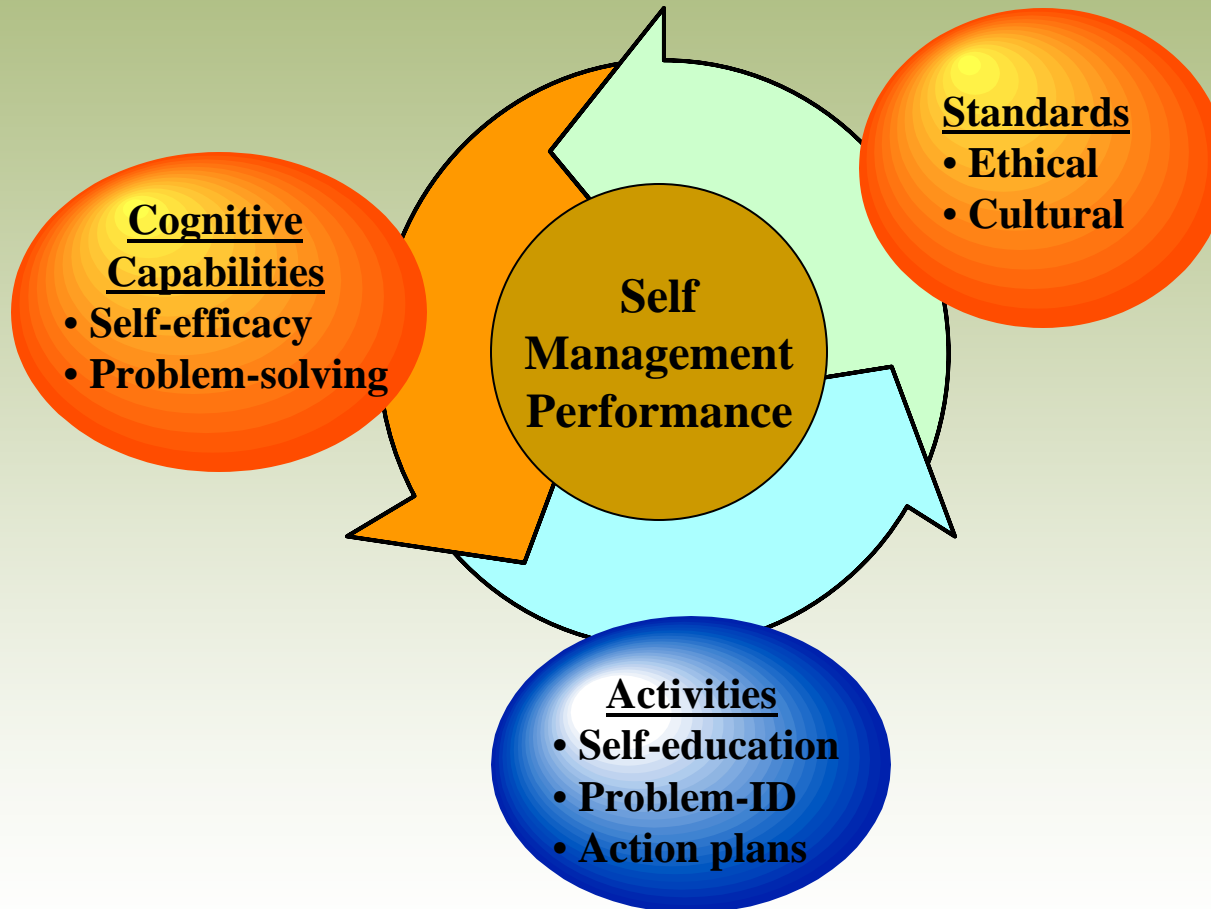
- Outside of the provider/patient feedback loop
- Lack access to quality clinical data on members
- Challenged with enabling continuity of care

# Growing Importance of Self-Management

# What is Self-Management?

- Recognition of the individual as both primary caregiver and patient (Bodenheimer et al., 2002; Denyes, et al. 2001)
- “...learning and practicing the skills necessary to carry on an active and emotionally satisfying life in the face of a chronic condition” (Lorig, 1993)
- Managing the interacting physiological, social and psychological dimensions of human nature
  - Proactive processes in support of activities to achieve purpose (Schilling et al., 2002)
  - More than self-care—self-education, problem identification, planning, and collaboration

# Self Management





# Value to Health Care's Stakeholders

- More active health care consumer
  - Shared responsibility for health management
  - Facilitates more effective demand management
- Improve quality and efficiency of self-reporting
- Increase adherence to prescribed regimens

# Barriers to diffusion of Self-management programs and tools

- Culture of dependency on medical practitioners; creates challenges in consumer engagement
- Lack of resources and capabilities in primary care practices to provide self-management education
- Who pays for self-management support?
- Lack of awareness on self-management's contribution to quality improvement

Source: Bodenheimer, Lorig, Holman et al., 2002

Catalyst for Change:  
Quality Measures for Self-  
Management

# Catalyst for Change: Quality Measures for Self-Management

- Quality improvement programs targeting physicians are growing in popularity
- Cornerstone of emerging pay-for-performance programs:
  - Bridges to Excellence
  - BCBS-MI Incentive & Gain-sharing programs
  - Integrated Healthcare Association
  - Wellpoint/Anthem Quality Insights
  - 100 or more...

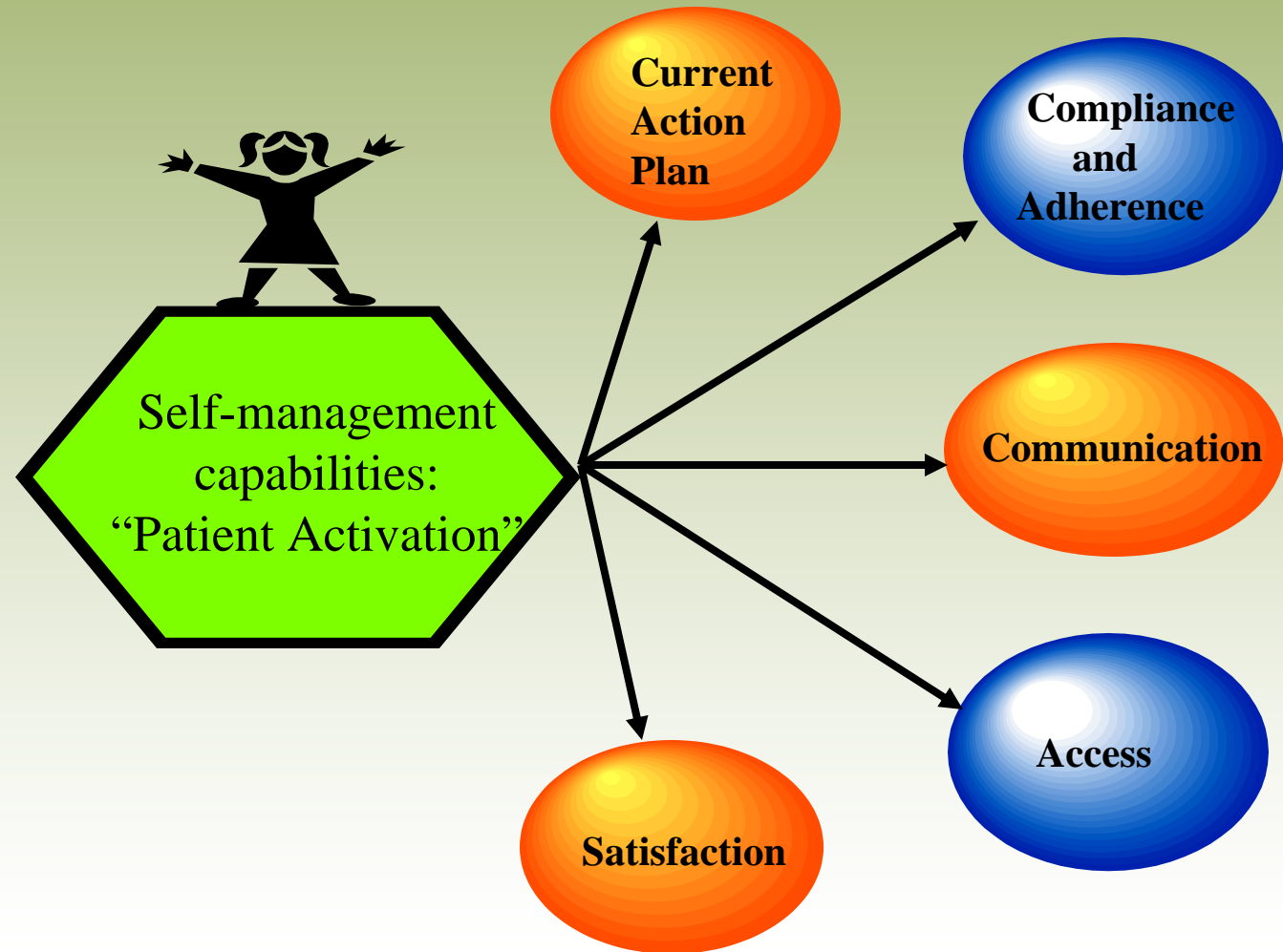
# Quality Measures in Pay-for-Performance

Integrated Healthcare Association	2007 Measurements (Partial list)
Clinical Domain	<b>Asthma care: Medication compliance and adherence</b>
	<b>Diabetes care: HbA1c control</b>
Patient Experience Domain	<b>Doctor-patient communication</b>
IT-enabled Systemness Domain	<b>Care management</b> - Chronic care management <b>Access and Communication</b> - Processes

**Enabled by  
Self-  
Management  
Tools**

Source: Integrated Healthcare Association, November, 2006

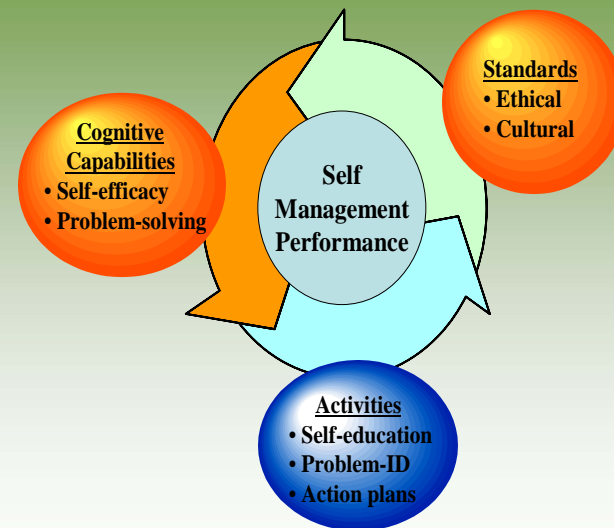
# Catalyst for Change: Self-Management → Quality Measures



# Enabling the Change: Self-management tools

# Enabling the Change with Self-management tools

- Potential to be a key agent in “moving the needle” on quality
  - Critical success factors:
    - Design to improve self-management performance
    - Specifically target factors influencing self-management performance





# IT-based Self-management tools

- Web-based
- Collaborative, team-oriented architecture
- Shared access to a personal health record owned by the individual
- Patient-centered, providing functions to assist the care team and the individual in managing...
  - Outcome expectancies
  - Standards for self-care
  - Self-education
- ...and enhancing...
  - Problem-solving skills
  - Self-efficacy

# Taxonomy of functional requirements for self-management tools

# Purpose of Taxonomy

- A construct for evaluating the linkage between tools and self-management performance
- A blueprint for building self-management tools
  - Unique, innovative approach focuses on evidence-based model of factors affecting self-management performance

# Taxonomy Structure

<b>Taxonomy Category (5)</b>	<b>Functional Sub-classifications (1...N)</b>
<b>Self-education</b>	<ul style="list-style-type: none"><li>▪ Health Risk Assessment</li><li>▪ Tutorials</li></ul>
<b>Outcome Expectancies</b>	<ul style="list-style-type: none"><li>▪ Individualized Care Plan</li><li>▪ Health activity tracking</li></ul>
<b>Problem-Solving</b>	<ul style="list-style-type: none"><li>▪ Skills inventory</li><li>▪ Challenges to overcome</li></ul>
<b>Self-efficacy</b>	<ul style="list-style-type: none"><li>▪ Health status measurement</li><li>▪ “Credits” for progress</li></ul>
<b>Standards for self-management practices</b>	<ul style="list-style-type: none"><li>▪ Desired types of interventions</li><li>▪ Contract of preferences</li></ul>

# Self-management Tools Taxonomy

## Self-education

- Access to endorsed content on the disease(s)
- Access to tools to identify and solve problems associated with chronic disease

- Health risk assessment tools
- Disease-specific links with recognizable certifications
- Disease specific tutorials with education credits
- Interactive decision support to facilitate decision-making
- Q&A discussion boards
- “Intelligent” guidelines to HRA for promotion of lifestyle change

# Self-management Tools Taxonomy

## Outcome Expectancies

- Specifying goals and strategies
- Expressing goals in terms of health status and quality of life
- Specifying planned activities to achieve goals

- Individualized Care Plan (ICP) based on results from HRA, etc.
- Measurable goals specified for health status and quality of life
- Planned activities to support the Individualized Care Plan
- ICP pledge of support from key stakeholders
- Personal health record

# Self-management Tools Taxonomy

## Problem-Solving

- Assessment of problem-solving capabilities and needs
- Identification of problems important to the individual
- Tracking of progress on problem-solving skills development

- Problem-solving skills inventory
- Activities demonstrating problem-solving skills
- Identify/present “challenges to overcome” i.e., problems
- Decision support for determining appropriate approach to solving a particular problem
- Association with similar types of problems and courses of action

# Self-management Tools Taxonomy

## Self-efficacy

- Expressing satisfaction with health status and perceived control of the disease
- Specifying and tracking level of confidence in executing on the action plan
- Tracking actual progress compared to plan and obstacles

- Health status measurement
- Tracking points i.e. “credit” for activities accomplished
- Monitoring of medical progress and vital signs
- Coaching on interventions, encouragement of activities
- Alerts enabling early intervention to prevent regression



# Self-management Tools Taxonomy

## Standards for Self-management practices

- Ethical and cultural standards
- Acceptable methods of care intervention
- Standards of performance

- Desired types of interventions
- Interventions to be discouraged
- Personal preferences
- Agreed upon types of interventions (negotiated between individual and stakeholders)

# Applying the Taxonomy

# Summary

- Self-management is a critical and integral component of the health care system's response to the growth of the chronic disease population
- Self management capabilities are a significant determinant of quality improvement
- Information technology is a key agent of self-management's central role in health care
- A taxonomy of functional requirements based on the key factors improving self-management performance can help guide the development and evaluation of effective self-management tools

Thank You!

Michael R. Solomon, MBA

Affiliate Consultant, Point-of-Care Partners;  
Faculty, College of Health & Human Services-  
University of Phoenix Online

For more information contact Michael at:

[michaels@pocp.com](mailto:michaels@pocp.com)

561.392.2937