Self-Management Goals Made Simple
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Linda M Jordan BSRN, MHCM
Field Representative
Ambulatory Care
Patient Self-Management Goals

- In order to achieve behavioral changes, patients need measurable short-term and long-term goals and action plans. These plans, along with support from the team, are critical in helping the patient successfully achieve their self-management goals.

- The agreed upon goal must truly be the patient’s goal, something the patient wants to do to improve their symptoms, function, coping or well-being.
Patient Self-Management Goals vs Clinical Goals

- **Clinical goal** – provider’s medical goal for the patient, usually long term
  
  *Example:* “Patient’s A1C will be less than 9.0”.

- **Patient Self-Management Goal** – patient’s goal to achieve the clinical goal, usually short term and identify behavior changes

  *Example:* “I will eat 3 balanced meals each day limiting my calorie intake to 1600 calories per day.”
Patient self-management goals are identified, agreed upon with the patient, and incorporated into the patient’s treatment plan.

The primary care clinician and the interdisciplinary team educate the patient on self-management tools and techniques based on the patient’s individual needs.

The clinical record includes the patient’s self-management goals and the patient’s progress toward achieving those goals.
WWW–Self-Management Goals (SMG)

WWW:
- Who can assist the patient in developing SMGs
- When to discuss SMGs
- Where to document SMGs

Tips
- Don't prescribe goals or use checklists
- Include family and caregivers in setting goals
- Have medical assistants ask patients about goals when taking vitals
- Assign staff to follow-up with patients by phone
- Have providers review goals with patients briefly
Helping Patients Develop SMGs

1. Assess:
   Beliefs, behavior, and knowledge

2. Advise:
   Provide specific information about health risks and benefits of change

3. Agree:
   Collaboratively set goals based on patients’ interest and confidence in their ability to change the behavior

4. Assist:
   Identify personal barriers, strategies, problem-solving techniques and social/environmental support

5. Arrange:
   Specify plan for follow-up (e.g., visits, phone calls, mailed reminders)

- Personal Action Plan
  1. List specific goals in behavioral terms
  2. List barriers and strategies to address barriers
  3. Specify follow-up plan
  4. Share plan with practice team and patients’ social support
Making SMART Goals

S - Specific What am I going to do?  
(What, when, where, how)

M – Measurable How will I know when I have got there?

A – Achievable Is this something I can do and in my control? What will I need?

R – Realistic Am I being realistic? What are the likely problems?

T – Time Bound Can I do this in a reasonable time frame?
Self-Management Goal Setting Techniques

1. **Ask**: Is there something you would like to work on to improve your health?

2. **Guide development** of a short-term goal that is SMART.

3. **Gauge the level of importance** and score on a scale of 1 to 10. If rated less than 7, adjust goal to something that is more important to the patient.

4. **Assess Confidence**. Score from 1 to 10 and adjust the goal to something that is 7 or more. A score of 6 or less suggests the goal is too hard. Likewise, if someone scores 10, then this goal is very easy for them and you could check if they wish to make it a little more challenging.
5. **Arrange short-term follow-up.** A phone call, email, or text within one or two weeks of setting a new significant goal and change can make a significant difference to likeliness of achieving it. Help the person problem-solve if they are facing barriers or struggling to achieve their goal and action plan.

6. **Document goal** in patient/client’s notes and be sure to ask about it at the next visit.
Motivational Interviewing

Motivational interviewing is a form of collaborative conversation for strengthening a person's own motivation and commitment to change.

Designed to strengthen an individual's motivation for and movement toward a specific goal by eliciting and exploring the person's own reasons for change within an atmosphere of acceptance and compassion.

The interviewer uses directive questions and reflective listening to encourage the patient to participate. This style of interview, asking the patient provocative questions and discussing the responses, can help uncover important self-management issues.

RULE Framework:
- Resist the righting reflex
- Understand & explore patient’s motivation
- Listen with empathy
- Empower the patient
Self Management Goals Worksheets

SMART Goals
People who choose their own goals with support of our office do better with long term diseases. What is the one thing you would like to do to improve your health?

Examples of things you can do include:

- Eating Plan
- Take Medication Properly
- Quit Smoking
- Exercise
- Reduce Alcohol Intake
- Reduce Stress
- Reduce Salt
- Weight Reduction
- Self-Monitoring
- Other

WHAT will you do?

__________________________

WHEN will you do it?

__________________________

WHERE will you do it?

__________________________

HOW will you do it?

__________________________

On a scale from 0 to 10:

How important is this to you? ______

How confident are you that you can achieve your goal? ______

Things that could make it difficult for you to reach your goal:

__________________________

My plan for overcoming these difficulties:

__________________________

Checking your progress toward reaching your goal is important for your success. Our plan to follow-up with you is: ____________________________

Everyday is a new chance to do something good for yourself!

Specific Measurable Action-oriented Realistic Time-specific (SMART) goals

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METAS INTELIGENTES
Las personas que eligen sus propios metas con el apoyo de su doctor y su equipo médico pueden llevar mejor las enfermedades a largo plazo. ¿Qué es la una cosa que usted querría hacer para mejorar su salud?

Ejemplos de las cosas usted puede incluir:

- Dieta
- Tome Su Medicina Apropiadamente
- Deje de Fumar
- Ejercicio
- Reduzca La Ingestión de Alcohol
- Reduzca La Tensión
- Reduzca La Sal en Su Dieta
- Pierda Peso
- De AutoControl
- Otro

¿QUE haría usted?

__________________________

¿CUANDO lo haría usted?

__________________________

¿DONDE lo haría usted?

__________________________

¿COMO lo haría usted?

__________________________

¿En la escala de 0 a 10, con que seguridad puede usted conseguir su objetivo?

__________________________

Las cosas que podrían hacer difícil para usted alcanzar su objetivo:

__________________________

Tu plan para vencer estas dificultades:

__________________________

Verificar su progreso hacia alcanzar su objetivo es importante para su éxito. Nuestro plan al seguimiento con usted es: ____________________________

¿Diario es una nueva oportunidad de hacer algo bueno para usted mismo!

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Self-Management Goals
Additional Resources

Institute for Healthcare Improvement (IHI)
www.ihi.org/resources/Pages/Changes/SetandDocumentSelfManagementGoalsCollaborativelywithPatients.aspx

Agency for Healthcare Quality and Research
http://pcmh.ahrq.gov/page/tools-resources

Health Literacy Precautions Toolkit
http://nchealthliteracy.org/toolkit

Qualis Health
www.safetynetmedicalhome.org/change-concepts/patient-centered-interactions