



## **HOW TO CONDUCT A “WALK-ABOUT” FOR SELF-MANAGEMENT SUPPORT IN AMBULATORY SETTINGS FROM THE PATIENT AND FAMILY PERSPECTIVE**

One way to begin working with patients and families in planning for improving self- management support is to explore the ambulatory care experience through the eyes of individuals with chronic conditions and their families. A “walk-about” is an activity that can be used to obtain patient and family perspectives. It is helpful to have more than one patient and family perspective. If you have patients and families who are advisors within your program, ask them to participate in the activity. If you don’t currently have any patients or families identified as advisors, invite several patients with chronic conditions and their families who receive care in your facility and are experienced in self-managing their condition. Select patients and families who are willing to share their opinions (refer to the resource titled, *Selecting, Preparing, and Advancing the Practice of Patient- and Family-Centered Care in Primary Care and Other Ambulatory Settings — How to Get Started, Part V: Selecting, Preparing and Supporting Patient and Family Advisors in Primary Care and Other Ambulatory Settings* for detailed guidance).

### **Instructions:**

It is best to select a time when the entire team, including patients and families, can observe or simulate a visit together. If he or she feels comfortable doing so, a patient/family advisor could lead this activity. Leading might mean helping everyone understand what a patient experiences as staff go through the various parts of a visit. The tour should begin at the point where a patient enters the office for their visit and continue through all of the activities of a typical care visit, including the exam and any activities that are part of chronic care management and support patient self-management. Consider all the experiences of the visit, not just the time a patient spends with a care provider in the exam room. You want to specifically explore how the following elements promote self-management and encourage patients and families to be active members of the health care team:

- How are patients and families introduced to their role as a self-manager?
- How are patients’ values and preferences elicited and explored?
- How does the patient get information and skills to be a better self-manager?
- What staff and clinicians do to build patient self-confidence in managing their chronic condition?
- How do patient forms and educational materials (or anything else they may receive or need to fill out as part of a visit) promote self-management?
- How is self-management promoted in the physical environment (e.g., posters, magazines, announcements)?

- Does the patient receive a care plan or visit summary before they leave?

The team should collect “evidence.” Assign one or more of the team to document the “walk-about” through:

- Digital photos, slides, or videotape.
- Notes from observation of simulated patient visit and exam.
- Patient forms and educational materials.
- Specific quotes or messages on posters or other announcement.

Make sure that the patients and families are expressing why they want a particular element of the visit captured in the photos or video. What is their perspective? One team member should be assigned to take notes during the tour to capture these thoughts. While this exercise is designed mainly for staff to see the care experience through the eyes of patients and families, all team members should be given the opportunity to identify elements and processes that are important to their work with patients with chronic conditions and their families. These may be elements or processes that physicians and staff perceive as helping or hindering their ability to offer collaborative self-management support.

The “walk-about” activity can be a fun, non-threatening way for clinicians and staff to begin to practice new processes and skills that promote self-management support, and for everyone on the team to develop an appreciation for and level of comfort with the collaborative process.

The “walk-about” can also be beneficial for patient and family advisors and potential advisors. It builds their understanding of staff and physician perspectives, care processes, and the environment of care. It allows them to begin to get a broader view of the positive elements of the system of care as well as areas for improvement. For new and potential advisors the activity can build their interest and confidence level for serving as an advisor.

Set aside a meeting time to discuss what the team discovered through the “walk-about.” Bring all the “evidence” to the meeting and discuss what you have learned about the experience of care through the eyes of patients and families. The tool titled, *Wearing New Glasses: — Seeing Self-Management Support from the Patient and Family Perspective*, can be used to record the findings of your “walk-about” and plan for change.