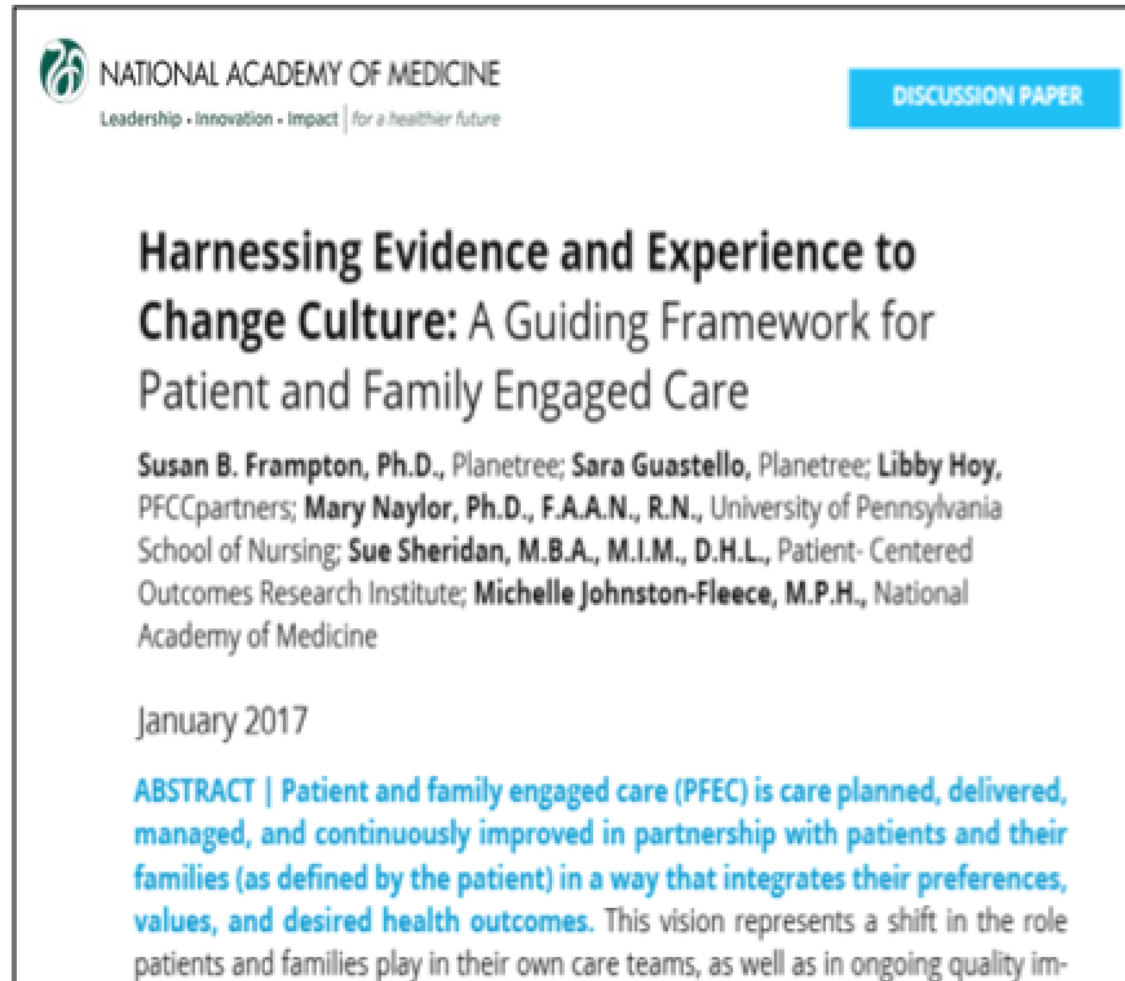


# TCPI Person and Family Engagement (PFE) Metrics - Introduction

PCPCC Support and Alignment Network  
in collaboration with  
The Institute for Patient and Family Centered Care



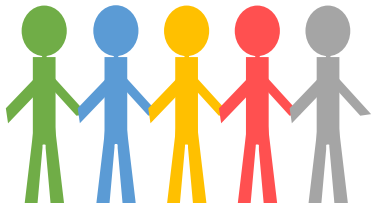
## Recent White Paper – Extensive Evidence on PFE



# Compelling Evidence for PFE

## Better culture, care, health and costs:

- Improvement in staff experience, retention, reduction in job stress and burnout
- Improved transitions of care, decrease in unnecessary readmissions
- Increased patient and family success in self- management, improved quality of life, reduced illness burden
- Reduced rates of hospitalization, emergency room utilization, shorter LOS and cost per case

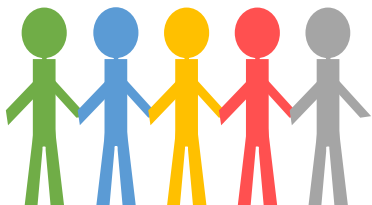


Download Article for free at [NAM.edu/PFEC](https://nam.edu/PFEC)



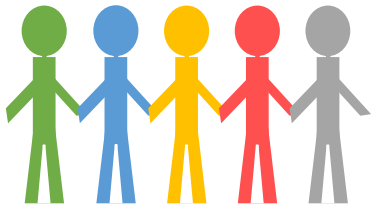
# PFE is essential to practice transformation

- PFE is a ‘Primary Driver’ of transformation in TCPI
- And, it is embedded in the Quality Payment Program
  - Quality Measures (60% of MIPS score)
    - Patient satisfaction
    - Medication management
  - Advancing Care Information (25% of MIPS score)
    - Patient portals, Summary of Care, e-Prescribing, patient-specific health education
  - Improvement Activities (15% of score)
    - Medicaid patient engagement
    - Patient and family engagement in QI
    - TCPI participation



# How the PFE Metrics Were Selected

- TCPI Patient Family Engagement Advisory Council launched January 2016
- Diverse Advisory Council membership:
  - Patient and family advocates
  - PFE experts
  - Patient advocacy organizations
  - Person/Family/Community Networks
  - Healthcare Clinicians
- Created a framework for measuring PFE performance
- Prioritized six metrics to measure across all practices



# The Person and Family Engagement Performance Metrics

6 Measures in 3 categories

## Governance

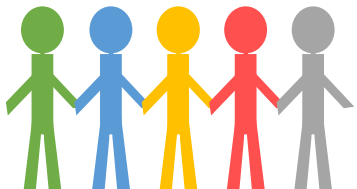
- Support for Patient and Family Voices (PFAC, Board, QI)

## Point of Care

- Shared Decision Making
- E-tool Use

## Policy and Procedure

- Patient Activation
- Health Literacy Survey
- Medication Management



# Governance

## **PFE Metric 1: Support for Patient and Family Voices**

Are there policies, procedures, and actions taken to support patient and family participation in governance or operational decision-making of the practice (Patient and Family Advisory Councils (PFAC), Practice Improvement Teams, Board Representatives, etc.)?

**Intent:** The intent of this metric is to include the perspective and voice of the patient and family in all aspects of the governance of the practice. According to the TCPI change package, each practice must implement a patient and family advisory group to infuse their voices in the policies, procedures, and governance of the practice.

**Ways to meet this metric:** The practice has a systematic process in place for including the perspective and voice of the patient and family (Patient Family Advisor) in all aspects of the governance of the practice.



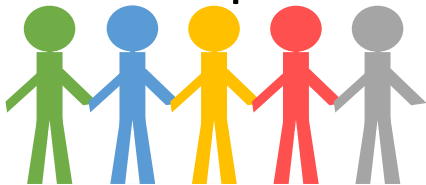
# Point of Care

## **PFE Metric 2: Shared Decision-Making**

Does the practice support shared decision-making by training and ensuring that clinical teams integrate patient-identified goals, preferences, outcomes, and concerns into the treatment plan (e.g. those based on the individual's culture, language, spiritual, social determinants, etc.)?

**Intent:** The intent of this metric is to ensure that patients (and their families according to patient preference) are authentically part of the care team.

**Ways to meet this metric:** Practice is using a tool to promote and teach shared decision making in order that patients (and their families according to patient preference) are authentically part of the care team.





# Policy and Procedure

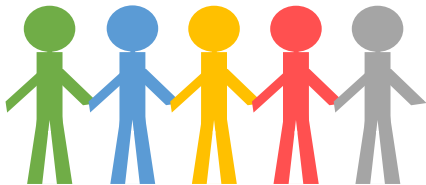
## **PFE Metric 3: Patient Activation**

Does the practice utilize a tool to assess and measure patient activation?

**Intent:** The intent of this metric is to use a standard method to measure a patient's activation level. Patient activation describes the level of a "patient's knowledge, skills, confidence to manage his or her own health and care."

### **Ways to meet this metric:**

- Practice is using a standard Patient Activation Measure (PAM) tool to assess and measure patient activation
- Practice has developed their own tool or is using MI and measuring patient's confidence in managing their health



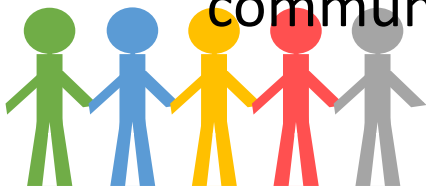
# Point of Care

## **PFE Metric 4: Active e-Tool**

Does the practice use an e-tool (patient portal or other e-connectivity technology) that is accessible to both patients and clinicians and that shares information such as test results, medication list, vitals, and other information and patient record data?

**Intent:** The intent of this metric is to have an electronic tool that allows patients to access their medical record and have an easy, direct way to communicate with providers.

**Ways to meet this metric:** Practice uses (and makes available to all patients) an e-tool that allows patients to access their medical record and have an easy, direct way to communicate with providers.



# Policy and Procedure

## **PFE Metric 5: Health Literacy Survey**

Is a health literacy patient survey being used by the practice (e.g., CAHPS Health Literacy Item Set)?

**Intent:** The intent of this metric is to ensure that practices are systematic in addressing health literacy issues.

**Ways to meet this metric:** A health literacy patient survey is being used by the practice to systematically address health literacy issues.



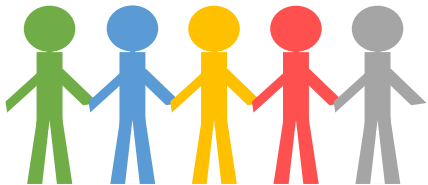
# Policy and Procedure

## **PFE Metric 6: Medication Management**

Does the clinical team work with the patient and family to support their patient/caregiver management of medications?

**Intent:** The intent of this metric is to ensure that all patients and/or their family are being supported to safely manage their medications.

**Ways to meet this metric:** There is a systematic, standard method in place to evaluate and support patients and their caregivers in medication self-management.



# What about PAT? Duplication/Overlap?

- Question 4

Practice can demonstrate that it encourages patients and families to collaborate in goal setting, decision making, and self-management.

- Question 5

Practice has a formal approach to obtaining patient and family feedback and incorporating this into the QI system, as well as the strategic and operational decisions made by the practice.

- Question 22

Practice uses technology to offer scheduling and communication options that improve patient access by including alternative visit types and electronic communication approaches.



# PFE Implementation Support Resources and Tools Available from CMS

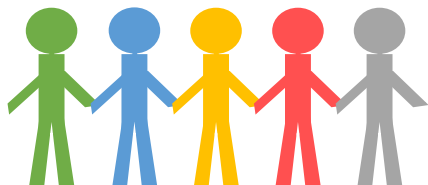
## 1. PFE Metric Survey Guide

- Definitions
- Actual questions and response categories
- Intention and
- Examples of tools, resources

## 2. TCPI Compendium Aligned with PFE Metrics

- Articles, Videos, Guidebooks, Curriculum & Tools
  - Will be updated every 6 months

*(Everything You Wanted to Know and More)*



# Technical Support Available from PCPPC SAN and Partners

PCPCC SAN website and PFE Resource Center  
<https://www.pcpcc.org/tcpi>

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