THE ACTION PLAN PROJECT:

Using behavior change action plans during the primary care visit

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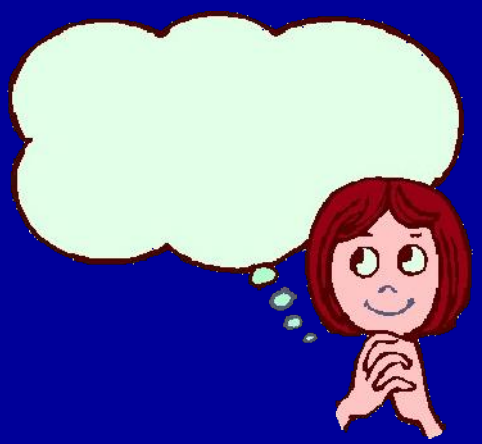

Co-Investigators:

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The Action Plan Project

- **Kate Lorig's work at Stanford**
  - **patients taking the classes have improved control of chronic disease symptoms, improved self efficacy, higher levels of physical activity, fewer hospitalizations and ED visits** (**Medical Care 1999;37:5-14 and 2001;39:1217-1223**)
  - **Action plans are a prominent feature of the classes**
- **Motivational Interviewing**
- **Brief Negotiation**

The Action Plan Project

- **REACH Considerations:**
  - **Primary care visits reach more patients, however,**
  - **Patients in primary care are at varying stages of readiness**
  - **Therefore, positive results may not hold in this more diverse sample of patients**

What is an Action Plan?

- An agreement between the clinician and the patient that patient will attempt to work on a concrete, small behavior change that has a high potential for success

Study Design

- Observational study to
- 8 study sites in the Bay Area; 4 safety net, 4 private practice
- 44 primary care clinicians (98% MDs)
- 432 English speaking patients with one or more chronic illness/risk factor

Primary Study Questions

Clinicians:

- Will they use Action Plans?
- Do they like using Action Plans?
- How much time do they estimate an Action Plan discussion takes?

Patients:

- Do patients remember their Action Plans?
- Do patients follow their Action Plans?

Action Plan Patients N=432

Study patients	N=280
Control patients	N=74
Females	61%
Non-white	69%
Safety-net	44%
Average age	52 years

Refused study	=57 (13%)
Not eligible	=21 (5%)

Protocols and Methods

- 45-50 minute clinician training
- Patient selection based on chronic illness diagnosis or major risk factors
- Clinician approval of study patient
- Patient recruitment and baseline questionnaire conducted before exam by a Research Assistant

Protocols and Methods

- Clinician questionnaires after AP discussion
- Patient follow-up by telephone 1-3 weeks following baseline appointment
- Follow-up interviews and questionnaires with clinicians at the end of the study
- 6-month follow-up with patients using mailed questionnaire
- 6-month chart review of clinical parameters

Clinicians

- Yes, they will use Action Plans
  83% (231/280) of the encounters with a study patient resulted in an Action Plan
- Time spent on Action Plan discussion (n=280)
  6.6 minutes (average)
- Clinician Satisfaction (n=254)
  57% More Satisfying
  31% No difference
  7% Less Satisfying
  5% Not Applicable

Clinician Follow-Up

- 20/44 clinicians to-date
  - 75% private practice
  - 25% safety net
- Average time in primary care=15 years
- Behavior change discussion:
  - easier (55%)
  - Same (35%)
  - Harder (10%)

Clinician Follow-Up

- Changed the way the like to discuss behavior change: 65%
- Will continue to use Action Plans: 70%
- Other caregivers are appropriate: 50%
  - Health educators 37%
  - Nurses 30%
  - Social Workers 17%
  - Medical Assistants 15%
- Biggest Barriers:
  - Time 95%
  - Difficulty 25%
  - Resources 15%

Patient Questions

- Follow up telephone calls were completed for 85% of patients (196/231)

- Patient adherence* 78% (152/196)

*patient accurately recalled the action plan and reported they were working on it

Patient Follow-Up

- Follow up questionnaires are being mailed to all control and study patients to assess changes in:
  - self-efficacy
  - health behavior
  - HRQOL
- As well as:
  - communication with provider
  - satisfaction with the action plan

MY ACTION PLAN

DATE: _____

I _____ and _____
(name) (name of clinician)

have agreed that to improve my health I will:

1. Choose one of the activities below:

____Work on something that's bothering me:

_____

____Stay more physically active!

____Take my medications.

____Improve my food choices.

____Reduce my stress.

____Cut down on smoking.

2. Choose your confidence level:
This is how sure I am that I will be able to do my action plan:

10 VERY SURE

5 SOMEWHAT SURE

0 NOT SURE AT ALL

3. Complete this box for the chosen activity:

What:_____

_____

How much:_____

When:_____

_____

How often:_____

_____
(Signature)

_____
(Signature of clinician)

Types of Action Plans

41%	Diet
31%	Exercise
10%	Other
8%	Smoking
7%	Medication
3%	Stress

Examples of Action Plans

- Having trouble losing weight. Agrees to reduce bread intake from 2 slices three times a day to 1 slice three times a day, starting right away
- Post-MI, still smoking. Many discussions with clinician on smoking not working. Action plan: patient always lights cigarette when leaving BART (twice a day). He will stop those two cigarettes. Patient liked it because he felt he could succeed.

Examples of Action Plans

- Patient with elevated cholesterol. Action plan is to keep a food diary. On follow-up phone call, patient was keeping the diary.
- Patient with heart disease. Action plan is to walk 20 minutes each day. On follow-up phone call, patient said "I am exceeding expectations."

Our current Action Plan

- Answer any questions you might have….