

Patient Advocacy Bootcamp

LESSON 6 Implementing an Action Plan



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Implementing an Action Plan

Learning Objectives

After completing this lesson, you should be able to:

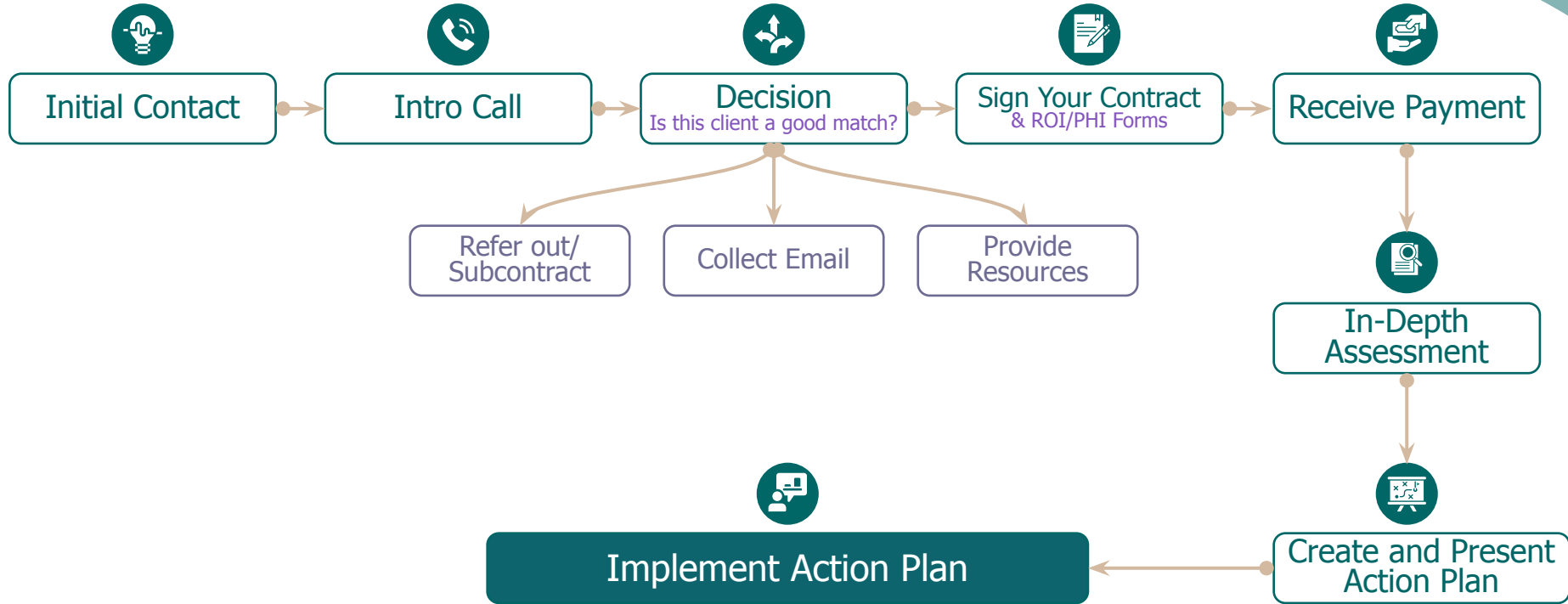
- Define high-level steps in advocacy workflow
- Identify ways to implement an advocacy Action Plan
- Explain methods for maintaining client satisfaction

All identifying information used in examples and case studies throughout these lessons have been altered to protect privacy.



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Workflow



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How to Implement an Action Plan

- Understand and uphold privacy rules
- Maintain open, clear communication
- Request and receive medical records
- Conduct research
- Identifying and securing appropriate supports
- Educate
- Modify as needed
- Maintain and assess client satisfaction



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Implementation: Privacy Rules

- Protected Health Information (PHI)
- Health Insurance Portability and Accountability Act (HIPAA)
- Disclosure rules
- Ethical standards



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Can We Share the Information We Have?

- Is your client their own decision maker?
- Are they an adult who is able to make their own decisions?
- Do they have an activated Power of Attorney (POA)?
- Are they a minor under the care of a parent or guardian?
- Are they an adult who is protected under guardianship?
- Who would you be sharing information with?



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Implementation: Communication with Providers

Methods of Communication

- In-person
- Phone
- Fax
- Portal
- Written



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Implementation: Communication with Family and Friends

Best Practices

- Active listening
- Honesty
- Transparency
- Accessibility
- Clarity (easy to understand)



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Implementation: Request and Receive Clinical Records

Request for Disclosure of Protected Health Information (PHI)

- Obtain proper paper form
- Complete and sign
- Submit
 - In-person
 - Fax or email as instructed
- Complete online/portal authorization form
 - Submit through portal
- Receive medical records
 - Paper
 - Electronic



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Implementation: Provider Research

- Primary care provider (PCP)
- Specialty provider/s
- Second opinion/s
- Other



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Implementation: Support Services

- Transportation
- Home care
- Home health
- Long-term care
- Meals
- Support groups
 - Client
 - Family
- Financial services



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Implementation: Educate and Strategize

- Health literacy
- Client-focused
- Ongoing support
- Patient safety



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When and How to Modify an Action Plan

- Goals are met
- Priorities change
 - Health
 - Support
 - Benefits



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How to Maintain and Assess Client Satisfaction

- Effective communication
- Personal connections
- Proactive engagement
- Feedback
 - Reviews
 - Surveys
 - Recommendations



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CASE STUDY

Sandy is an 81 y/o woman who never married and has no children. Her niece and nephew have newly activated Power of Attorney (POA).

- Her newly activated POA lives out of state
- Has dementia with anxiety
- Has alcohol dependency
- Moved into independent living facility
- Lost access to transportation
- Exhibits behavioral issues and has conflicts with facility staff

*All identifying information has been altered to protect privacy.



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CASE STUDY

Goals identified from initial meeting:

- Support with healthcare appointments
- Support with transportation to and from provider appointments
- Support as impartial person to talk with and stay connected to family and friends with boots on the ground

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CASE STUDY

Advocacy services to consider:

- Establish and maintain line of communication with all key people
- Maintain scheduling and organization for all future provider visits
- Prepare prior to appointments with questions from Sandy, family and/or facility staff
- Attend appointments, ask questions, take notes
- Provide follow up information following appointments
- Regular 1:1 visits and as needed

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DISCUSSION / Q&A



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LESSON QUIZ

This assessment is a review of

- How to implement an Action Plan
- Considerations for privacy and information sharing
- How to obtain medical records
- How to communicate effectively with all relevant parties
- How and when to change an Action Plan
- How to assess and maintain client satisfaction



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