

Self-Management Support Roles and Tasks in Team Care

- Use a Planned Care Visit encounter with patients to focus on aspects of care that typically are not delivered during an acute care visit. The team’s objective is to deliver evidence-based clinical management and patient self-management support at regularly scheduled intervals without the “noise” inherent in the acute care visit.
- Self-management can also be included as “Opportunistic Care” with patients who have not or will not come in for Planned Care Visits if team members have designated tasks, are trained and ready so they can efficiently engage with patients about chronic conditions when the opportunity arises during acute visits.
- Designating team members and training for these tasks are the important steps to implementation

Instructions:

Key Contacts - This chart contains the typical types of staff available on primary care teams, and the basic tasks of self-management support. Please complete the chart by describing the activities of each team member for each of the basic tasks of self management support. Of course, not every team member will engage in each activity. Add other roles or other tasks that describe how you implement SMS on your team. Then consider the training questions following the chart.

Role	Primary Care Provider	Primary Care Nurse	Medical Assistant	Clinical Care Manager	Nutritionist, PT, OT	Clerical Staff, PCR	Patient Peers
Introduce SMS and patient role							
Set visit agenda							
Collaboratively Set Goals							
Provide information and training to patients							
Create an Action Plan							
Link patients with system and community							

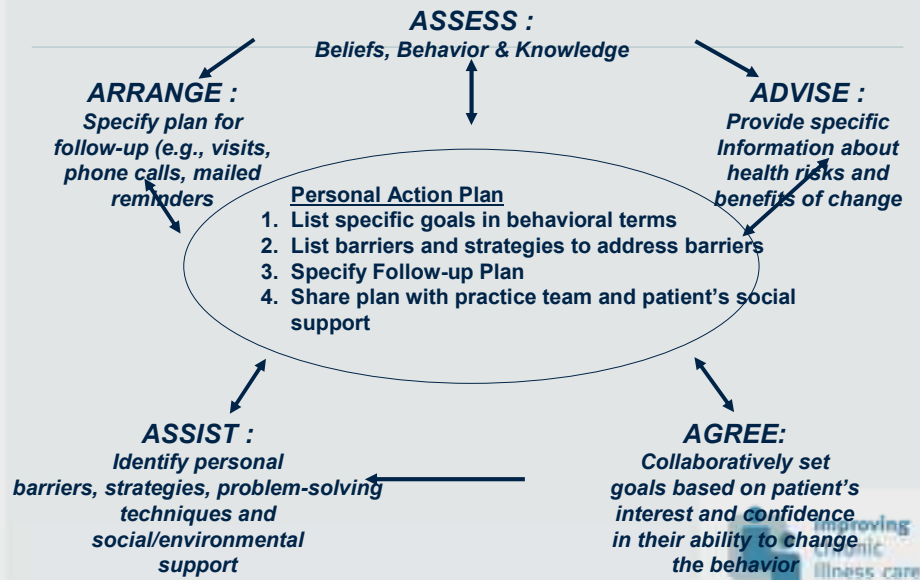
resources							
Proactive follow up							

What are the training needs for each team member, given the SMS tasks they are performing?

How can teams assure that all roles are covered?

What kinds of training will best meet each team members needs? Training according to role? Training as a team?

Self-Management in office practice



Glasgow RE, et al (2002) *Ann Beh Med* 24(2):80-87