

# Coaching lower-activated patients: Preventive care



Phreesia

Use this guide to coach lower-activated patients (PAM® Levels 1 and 2) on the basics and benefits of preventive care, as well as the importance of scheduling screening tests or procedures, following up on results and making healthy choices.

## Build knowledge:

Discuss the basics and benefits of preventive care.

- **Emphasize that preventive care can help prevent health problems** or support earlier diagnosis and treatment. Explain how annual wellness visits, cancer screenings, vaccinations, dental exams and vision exams are examples of preventive care that are usually covered by health insurance plans. Let the patient know that it's their responsibility to manage these.
- Ask the patient to share **their most pressing health concerns**, and explain how preventive care helps address them.
  - Example: If a patient is worried about catching a virus while traveling, talk about the value of getting an annual flu shot.
- Explain that, whenever possible, **the patient should visit their primary care provider (PCP) before going to the emergency room or to an urgent care clinic**. Help the patient understand that PCPs can answer their questions and help them navigate any issues with medications or referrals.

## Build skills:

Help patients organize and track their screenings and follow up on results.

- Work with the patient to **create a list of relevant screenings**. Leave three blank boxes next to each screening. Ask the patient to write down when they should get the screening in the first box, and any scheduling instructions in the second. In the third box, ask the patient to document when they can expect to receive their screening results.
- Inform the patient that **they are in charge of managing their health and care**. Busy healthcare organizations may not always follow up, so the patient should feel comfortable reaching out if needed. Together, plan for how and when the patient will follow up with their care team if they don't receive results by the date indicated in the third box.

## Build skills:

Help patients organize and track their screenings and follow up on results.

- Explain that **it's normal to not know how to interpret the results of a screening**. The patient doesn't need to feel embarrassed about asking providers for an explanation if they don't understand a result.
  - Tell the patient that it's OK to say, "I'm not following you. Can you explain it in another way?" or, "Can you help me understand what this means for my health?"

## Build confidence:

Explain how patients can achieve a healthier lifestyle as part of their preventive care.

- Talk about how **preventive care is just as much the patient's responsibility as their care team's**. Making healthy lifestyle choices—such as eating nutritious foods, staying hydrated, getting enough sleep and exercise, avoiding smoking and prioritizing their mental health—can help lower their risk of disease, disability and death.
- Ask the patient to **choose one area of their health they want to focus on** as part of their preventive care. What is a small, easy change they can make to benefit that focus area?
  - Example: If the patient chooses hydration, suggest that they replace one soda with a glass of water each day.
  - Help the patient **come up with a healthy reward** for each time they incorporate that small, easy change into their everyday life. For instance, each day the patient remembers to replace a soft drink with water, they may "earn" an extra 30 minutes to watch TV or play with their pet.

