

## *What Matters:*

# IP Collaboration to Enhance Wellness through Functional Activities

Presenter: Scinda Janssen, PhD, OTR/L, CLA  
Contributing Authors: Donald Jurivich,  
Carter Schimke, Dakota Snustad, Mitchell Floura,  
Casey Morton, Marsha Waing, Jeremy Holloway,  
Meridee Danks, Karen Semmens and  
Gunjan Dhawan Manocha



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## What Matters: Overview

This session will focus on ***What Matters*** to older adults, with particular attention to functional activities that are needed and/or meaningful, which is invaluable for prioritizing goals for healthcare planning.



## Session Objectives:

Upon completion of this program, the learner will be able to...

- Identify interprofessional ***assessment*** strategies that illuminate ***What Matters Most*** to older adults
- Practice ***therapeutic communication*** that helps older adults ***prioritize meaningful goals*** that support adherence to health management strategies
- Demonstrate ***interprofessional interventions*** for functional abilities to support health, well-being, and quality of life



## 4 Ms: Age-Friendly Health Systems

- What Matters, Medication, Mentation, Mobility
- What Matters; Health Priorities; Functional Activities
  - Prioritizes pt's healthcare goals
  - Aligning healthcare plan with those goals
  - Ensure pt's goals and preferences are understood, documented, and used for plan

Institute for Healthcare Improvement [IHI] (2020)  
Tinetti, Naik, & Dindo (2018)



## What Matters: Description

- **Central** to the 4 Ms
- Identifies individual's preferences and health outcome goals & functional abilities
  - **Values, activities, & tasks** that give meaning and quality to daily living
- Guides overall care and end-of-life care

Institute for Healthcare Improvement [IHI] (2020)  
Tinetti, Naik, & Dindo (2018)



## Why is “What Matters” so important?

- Motivation: Use their priorities as overarching motivator for other Ms.
  - Example
    - If “Henry” really wants to be able to take care of his grandchildren more than anything else, then he will more likely follow through on medication management, mobility exercise, and participation in cognitive activities to promote his overall health.
- Supports IP collaboration, including the pt/client as the primary team member



## Examples of pt priorities and engagement

Deep down, what matters most to you? (Tinetti, Naik, & Dindo, 2018)

Examples related to “**Doing**” or “**Functional Activities**” or “**Occupations**”

- Participation in meaningful activities/occupations/tasks
- Socializing with people: family, friends, community
- Productivity, work, volunteerism
- Health promotion activities
- Self Care/ADLs/IADLs
- Caregiving to others
- Community



## Why is “What Matters” so important: Adherence

- **Motivation** supports **Adherence** to health mgmt recommendations
- “Compliance” is a bad word because it suggests authoritarianism of healthcare
- Adherence/Ability to Follow Through is more **collaborative** and encourages providers/pts to identify barriers and develop strategies to override the barriers

## What Matters

# Assessment: Ecology of Human Performance (Dunn, 2017)

## EHP (Dunn, 2017)

- Model designed for interprofessional teams
- Comprehensive to assessment and enhance performance range for engagement
  - Person
  - Tasks
  - Natural Environments

## Assess: *Create several “What Matters” questions within 4 Ms framework*

- **EHP (Dunn, 2017)**
  - **Personal** aspects that affect engagement: Language, race/ethnicity, religious/spiritual/cultural preferences, abilities, limitations, etc
    - Literacy: health, reading, information systems, technical
  - **Activities/Tasks**: ADLs, IADLs, work/volunteer, caregiving, learning/education, socializing
    - Leisure: Enjoyment = engagement
      - Great source for health promoting strategies
  - **Context**: physical, social, cultural, internal, etc

## Assessment: Barriers to finding out What Matters.

- How many of you have experienced a client/pt who was hesitant to tell you what was most important or most needed?
  - What strategy worked or did not work well?
  - Ex: Client who did not want a home eval because she was worried healthcare worker would say she needed to go to a nursing home.
- Identify barriers through skilled communication

## Assess: Interactive Strategies to address overcome barriers

- ***Motivational Interviewing*** (Miller & Rollnick, 1995)
- Manual for ***Active Listening*** to identify values associated with ***What Matters*** (Tinetti, Naik, & Dindo, 2018)
- ***Intentional Relationship Model*** (Taylor, 2020)

## Motivational Interviewing (Miller & Rollnick, 1995) & Active Listening (Tinetti, Naik, & Dindo, 2018)

- Counseling approach that can be used by IP team members
- Aligns with What Matters
  - **person-centered**
  - **goal directed:** supports positive change
- Strategies:
  - **Open-ended guided questioning** that starts with “How” or “What” or “Please, describe...”
    - Never “Why” as it can trigger defenses
  - **Paraphrase/reiterate/affirm**
  - **Reflect feelings** behind words/empathy



## Intentional Relationship Model by Renee Taylor (2020)

- **Therapeutic use of self**
  - Empathy
  - Intentionality
  - Interpersonal knowledge
- **Interpersonal Reasoning guide** to selection of **therapeutic modes:**
  - Empathy, collaborating, advocating, encouraging, instructing, problem-solving
- **6 Steps** to managing challenging **interpersonal events**





## What Matters: Practical Example Assessment

- Health Ambassadors Teams for Seniors (HATS; HRSA grant) program developers created an IP wellness assessment for students to do with older adults via telehealth (with supervision).
- Students ask questions from different parts of assessment.
  - Ex: PT does mobility, OT does What Matters/ADLs, Nursing covers Meds, Medical covers health history, etc.

## Assessment: Katz Index of Independence in ADLs

- Tried and true tool
- Can be used by different IP team members
- Can be completed in less than 30 minutes but can also select 5 min tasks or use modified versions
- Measures assistance needed for: eating, continence, transfers, toileting, dressing, and bathing
- Scored A (independent) through G (Dependent in all 6 items)
- Drawback: Floor/ceiling limitations

Bortnick (2017b)

## Katz Psychometrics

- Good inter-rater reliability (Arik et al., 2015; Katz, Ford, Moskowitz, & Jackson, 1963)
- Good predictive validity for early prognosis and rehab planning of CVA outcomes (Asberg & Nydevik, 1991).

Bortnick (2017b)

## Katz

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- More original info: See reference slide

Bortnick (2017b)

## What Matters: Assessment Case Example

- Meet “*Dotty*”!
- Hx CVA, has challenges related to **M**obility, **M**entation, and **M**edication mgmt.
- HATS team did the wellness assessment with her via telehealth technology



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## Assessment: “Dotty”

- Using principles of motivational interviewing and the IRM we asked:
  - Early in interview: What Matters
    - What else would you like us to know about you?
    - What matters most to you about your health?
    - Tell us what a good day would be like for you (e.g. activities, people, etc)
- Middle of interview: health determinants, other 3 Ms, Katz, IADLs (Borton, 2017a; Lawton & Brody, 1969), etc

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## What Matters: “Dotty”

- At the end, we went back again to **What Matters** and asked her what she wants to do the most?
  - She brightened up suddenly and enthusiastically said

***“I like to go for rides!”***

## Assessment: “Dotty”



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## What Matters to Dotty

- Dotty's desire to go on **car rides** was **central** to her motivation to take care of her health and maintain her mobility

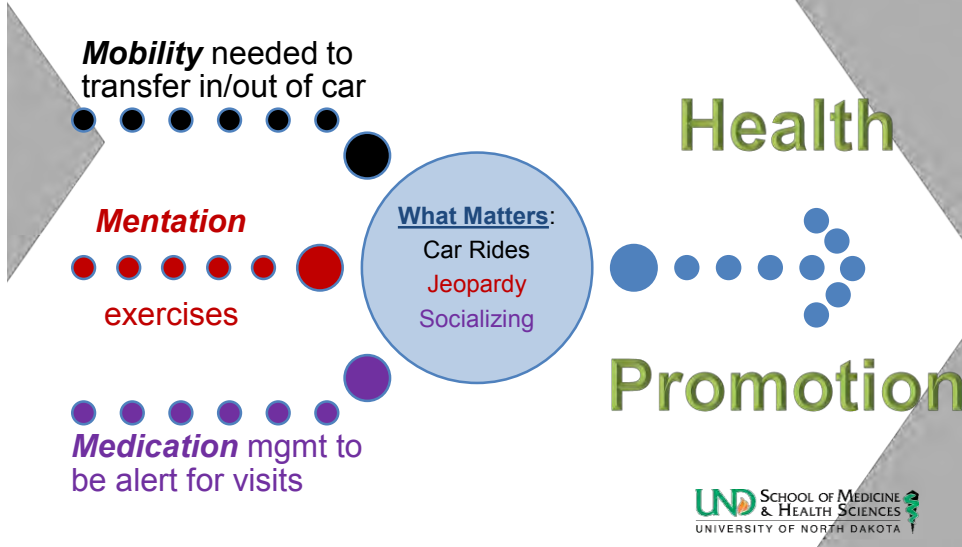
## What Matters: Other Priorities for Dotty

- **Watching Jeopardy:** Dotty works hard to answer all the questions, with many re-runs.
- **Socializing:** Dotty loves to visit with people



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# Can Centralize *What Matters* to Motivate engagement in other Ms



## What Matters

**Healthcare**  
**Plan:** Ecology of Human Performance (Dunn, 2017)

## What Matters: Promote Performance in Prioritized Functional Abilities

Performance/Engagement is Interaction Between:

Environment  
Activities/Occupations/Tasks  
Person

## Intervention: Environment

- Older adult, friend, or family can modify home environment to enhance safety with functional activities

This checklist was produced with support from the MetLife Foundation.

**CDC** Centers for Disease Control and Prevention  
National Center for Injury Prevention and Control

**Check for Safety**

**A Home Fall Prevention Checklist for Older Adults**

for more information, contact:  
Centers for Disease Control and Prevention  
1 (800) CDC-INFO (232-4653)  
[www.cdc.gov/steadi](http://www.cdc.gov/steadi)

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# Plan: Environment



"Last Saturday our son helped us move our furniture. Now all the rooms have clear paths."

### FLOORS: Look at the floor in each room.

- Q: When you walk through a room, do you have to walk around furniture?
  - Ask someone to move the furniture so your path is clear.
- Q: Do you have throw rugs on the floor?
  - Remove the rugs or use double-sided tape or a non-slip backing so the rugs won't slip.
- Q: Are there papers, books, towels, shoes, magazines, boxes, blankets, or other objects on the floor?
  - Pick up things that are on the floor. Always keep objects off the floor.
- Q: Do you have to walk over or around wires or cords (like lamp, telephone, or extension cords)?
  - Coil or tape cords and wires next to the wall so you can't trip over them. If needed, have an electrician put in another outlet.

### STAIRS AND STEPS: Look at the stairs you use both inside and outside your home.

- Q: Are there papers, shoes, books, or other objects on the stairs?
  - Pick up things on the stairs. Always keep objects off stairs.
- Q: Are some steps broken or uneven?
  - Fix loose or uneven steps.
- Q: Are you missing a light over the stairway?
  - Have an electrician put in an overhead light at the top and bottom of the stairs.
- Q: Do you have only one light switch for your stairs (only at the top or at the bottom of the stairs)?
  - Have an electrician put in a light switch at the top and bottom of the stairs. You can get light switches that glow.

- Q: Has the stairway light bulb burned out?
  - Have a friend or family member change the light bulb.
- Q: Is the carpet on the steps loose or torn?
  - Make sure the carpet is firmly attached to every step, or remove the carpet and attach non-slip rubber treads to the stairs.
- Q: Are the handrails loose or broken? Is there a handrail on only one side of the stairs?
  - Fix loose handrails or put in new ones. Make sure handrails are on both sides of the stairs and are as long as the stairs.



# IP Plan: Activities/Occupations/Tasks



- Use leisure to target health priorities
- Ex: Mentation & Mobility Goals
- Fosters cognitive orientation: focusing sequencing steps, attention span, decision-making
- Increased duration, repetition, and intensity of cognitive skills because it is meaningful
- Lifts mood and self-efficacy
- Can do in standing for strength, balance, endurance





## IP Plan: *Weakness due to malnutrition/not eating*



Difficulty with safe mobility causes them to *avoid meal preparation/eating* because it is hard to carry food items while having 2 hands on a walker

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- MD assesses & refers
- PT helps with safe mobility/balance
- OT helps with adaptive strategies like tray on walker to carry items
- Nursing/pharmacist helps with coordination of medication with meals
- Nutritionist helps with diet
- SW helps set up home delivered meals

## IP Plan: Activities/Occupations/Tasks

- Meal preparation
- Targets **Mentation, Mobility, Medication** and **What Matters**
- IP team can work together in any setting with meal preparation to target each area



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## IP Plan: Personal Support

### Referrals

- More medical assessments if indicated
- Skilled services: Psychology/Counseling, Nursing, RT, PT, OT, SW, SLP, MD, Pharmacology, etc
- Home health support for ADLs/IADLs
- Home companion

### Community Resources

- Service Providers for Seniors: Lists of Services
- Home Delivered Meals
- Senior Citizens Center
- Senior Rider Programs
- YMCA/Community Fitness Programs for Older Adults



## HATS Planning

- Students discuss assessment findings and select recommendations from a resource guide provided to give to the older adult participant.
- Personalized Prevention Plan  
Recommendations: Screenings, vaccines, What Matters (doing meaningful activities with supportive community resources), medications, Mentation activities, Mobility suggestions/resources



## IP Wellness Plan for Dotty:

- What **referrals** might be suggested for Dotty that could help her address the other **3 Ms** so that she could continue to do “What **Matters**”? (go for rides, watch jeopardy, and socialize)
- What **community resources** may be helpful for Dotty?

## Summary: What Matters

- What Matters can be central to 4Ms as it addressing meaningful functional activities
- Prioritize health goals and support adherence to health promoting strategies
- IP Assessment is comprehensive
- Plan should include IP Collaboration, referrals, & resources

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