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# Pathway Pearls



## Patient Education Resources - Heart Failure & COPD

Who, What, When, Where, Why, How?

2018May15

# Learning Objectives



- Recognize priority patient learnings
  - Identify available HF/COPD pt education resources
  - Discuss logistics of education resources availability
  - Share site experiences
  - Identify 2 Pathway Pearls to assist implementation
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# Outline



- Best Practice Recommendations
  - COPD Patient Education (Donna Nelson RRT II)
  - Heart Failure Patient Education (Jennifer Penner RN, BScN, CCRN)
  - Group Discussion:
    - Who:** Orders the resource?
    - What:** COPD / HF patient education resources should be used?
    - When:** Should they be provided/reviewed with the patient?
    - Where:** Should they be stored?
    - Why:** Start education while in hospital?
    - How:** Do you record when patient education is completed?
  - Wrap Up
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# Recommendations

**COPD:** Controversy- is there a benefit to COPD pt education?

- Rehab works, education alone show little benefit
- Education + case manager + action plan works
- ↑ effect if includes motivational interview-based health coaching

GOLD 2017 Report; CTS 2017 Recommendations

**Heart Failure:** weak recommendations / low-quality evidence

- Restrict dietary salt intake
- Daily weight monitoring
- Restrict daily fluid intake

CCS 2017 HF Guidelines

# Presentation

- COPD Patient Education:  
Donna Nelson RRT II  
Clinical Lead for ER/Medicine/Surgery  
Grey Nuns Community Hospital  
Edmonton
  - HF Patient Education:  
Jennifer Penner RN, BScN, CCRN  
Instructor, Heart Function Clinic  
Lethbridge
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## Sample Resources



Figure 2 - Breathing with your diaphragm



**Heart Failure Management Guide**

Alberta Health Services

**Managing Heart Failure: Heart Failure Action Plan**  
**KNOW WHEN TO CALL YOUR DOCTOR OR SEEK HELP**

**GREEN ZONE: All Clear**  
 Your heart failure is in good control if you have:  
 • No shortness of breath  
 • No swelling  
 • No weight gain  
 • No chest pain  
 • No problem keeping up your activity level

**GREEN ZONE Means:**  
 • Your symptoms are under control  
 • Keep taking your medications as ordered  
 • Keep checking your weight every day  
 • Continue to follow a 2 to 3 gram sodium restricted diet  
 • Keep all doctor appointments  
 • It's safe to exercise

**YELLOW ZONE: Caution**  
 • You gain 2 lbs or more overnight or more than 5 lbs in 1 week  
 • You have an increased cough  
 • You have increased swelling in your feet, ankles, legs or belly  
 • You feel more short of breath with activity  
 • You feel it harder to breathe when lying flat  
 • You feel it easier to sleep by adding pillows or sitting up in bed  
 • You feel more tired and don't have the energy to keep up your usual daily activities

**YELLOW ZONE Means:**  
 • You may need to adjust your medication based on your symptoms  
 • Ask your doctor if you should  
 • If your symptoms or weight do not improve with extra diuretic medicine (GDL) use of the following:  
 • Doctor  
 • Community Care Nurse

**RED ZONE: Medical Alert**  
 • You are struggling to breathe  
 • Your shortness of breath does not go away while sitting up  
 • You have chest pain that does not go away with rest or with medicine  
 • You have trouble waking, dizziness or are feeling confused  
 • You have a fast heartbeat that does not slow down when you rest  
 • You have fainted or been unconscious

**Red Zone Means:**  
 • You may need to adjust your medication  
 • Call the nearest emergency department  
 • Call 911  
 • Call your doctor right away if you are entering the red zone

Cardiovascular and Stroke Research, Clinical Research

**Living Well with Heart Failure**

**Signs and Symptoms**

- Shortness of Breath**
  - Breathlessness during activity or at rest
  - Trouble breathing, particularly lying flat
  - Shortness of breath while sleeping which may cause you to wake up
- Swelling**
  - Swelling of the face, feet, ankles, legs, or belly
- Fatigue/Confusion**
  - Feeling tired all the time and having trouble with everyday activities
  - Memory loss and feeling disoriented
- Weight Gain**
  - Sudden weight gain of 2 or more pounds overnight or 5 pounds in a week
- Heart Palpitations**
  - Heart racing or pounding
  - Increased heart rate
- Chest Pain (angina)**
- Persistent Coughing or Wheezing**

If you have 1 or more of these signs and symptoms, please talk with your doctor.

**Living Well with COPD**  
Chronic Obstructive Pulmonary Disease

*A plan of action for life*

**Summary Guide**

**Living Well COPD**  
Chronic Obstructive Pulmonary Disease

*A plan of action for life*

**Being healthy with COPD**

- Preventing your symptoms and taking your medications
- Managing your breathing and easing your energy
- Managing your stress and anxiety
- Adapting and maintaining a healthy and fulfilling lifestyle
- Developing and integrating a plan of action into your life

*This guide helps you:*

- Understand Professional
- Understand

**Living with Heart Failure**  
 Resources to help you manage your heart failure

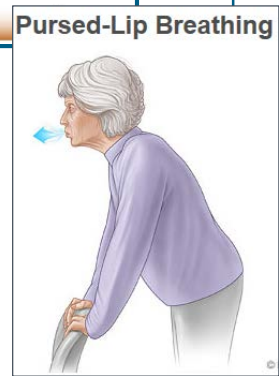
**Sodium Foods**  
 Many foods contain sodium (salt). A low sodium diet may help lower blood pressure.

**Choose** These foods will help you reduce sodium:

- Fresh fruits and vegetables
- Fresh meats, poultry, or fish
- Low-fat dairy products
- Whole grains
- Unsweetened applesauce
- Unsweetened fruit and vegetable juices
- Unsweetened soy sauce
- Unsweetened vinegar
- Unsweetened ketchup
- Unsweetened mustard
- Unsweetened mayonnaise
- Unsweetened salad dressing
- Unsweetened soybean paste
- Unsweetened soybean paste
- Unsweetened soybean paste
- Unsweetened soybean paste

**Limit** These foods have more sodium. Limit them to the amounts listed below:

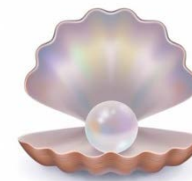
- Pickled or fermented vegetables
- Canned soups
- Canned meats
- Canned fish
- Canned vegetables
- Canned fruits
- Canned beans
- Canned tomatoes
- Canned soups
- Canned meats
- Canned fish
- Canned vegetables
- Canned fruits
- Canned beans
- Canned tomatoes



**COPD Medications**

Medication	My Dose	Side Effect(s)	Caution(s)
Acqua <sup>®</sup> Bricanyl <sup>®</sup> Spiriva <sup>®</sup> Ventolin <sup>®</sup>	• Relaxes muscles in the airways • Works within minutes when needed • Used before activity to prevent attacks	• tremor (shaky shakiness) • fast heart rate • headache • dizziness • dry mouth	• Keep with you at all times for use • During lung attacks/flare-ups • Episodes of shortness of breath • Episodes of difficulty breathing • Use spacer with all MDIs <sup>®</sup>
Tudorza <sup>®</sup> Serevent <sup>®</sup> Inhaler <sup>®</sup>	• Relaxes muscles in the airways	• dry mouth/throat • constipation • trouble urinating • headache	• Avoid getting the powder in your eyes • Avoid getting respiratory tract in your eyes • If trouble urinating, stop medication and see your doctor
Serevent <sup>®</sup> Oribron <sup>®</sup> O-nase <sup>®</sup> Sivair <sup>®</sup>	• Relaxes muscles in the airways	• headache • tremor (shaky shakiness) • fast heart rate • muscle cramps	• Vented onset
Accoya <sup>®</sup> DuoIna <sup>®</sup> Inspirator <sup>®</sup> UbiAir <sup>®</sup>	• Relaxes muscles in the airways	• dry mouth/throat • trouble urinating • headache • tremor (shaky shakiness) • fast heart rate • muscle cramps	• 2 medications in one device • Once daily usage • Avoid getting the powder/Mist in your eyes

# Documentation - COPD



## Admission to Discharge Checklist

COPD Admission to Discharge Checklist				
Admission Date (yyyy-Mon-dd)		Time (hh:mm)		
Activity	Completed			Initial
	Yes	No	N/A	
<b>Patient Education</b>				
1. Provide 'Patient Education Resource Package' – Review with patient/caregiver				
a) COPD Medications				
b) Inhaler Technique				
c) COPD: Learning to Breathe Easier				
d) COPD: Avoiding Your Triggers				
e) Pneumococcal / Influenza Vaccines				
f) Tobacco use; assess, provide brief intervention, and tobacco cessation support resources.				
<b>Patient Demonstration</b>				
2. Patient demonstrates adequate inhaler technique				
<b>Prior to Discharge</b> <i>Review results, where relevant, and ensure appropriate follow-up</i>				
3. Early mobilization (done within 48 hours by any discipline)				
4. Review and optimize respiratory medication				

COPD Discharge Management Plan	
COPD Education Resource Package <i>(Include all handouts identified)</i>	
<b>Bring this Management Plan with you to your next visit</b>	<b>Handout</b>
<b>Nutrition</b> Dietitian referral <input type="checkbox"/> No <input type="checkbox"/> Yes ▶ Phone _____	
<b>Activity</b>	<input type="checkbox"/> COPD: Learning to Breathe Easier
<input type="checkbox"/> Practice breathing and coughing techniques to help when you feel short of breath	<input type="checkbox"/> COPD: Avoiding Your Triggers
<input type="checkbox"/> Use body positions and energy conserving methods to help prevent feeling short of breath	<input type="checkbox"/> COPD Medications
<b>Medication</b> Prescription <input type="checkbox"/> No <input type="checkbox"/> Yes	<input type="checkbox"/> Inhaler technique: Devices
Discharge medication list faxed to community pharmacy <input type="checkbox"/> No <input type="checkbox"/> Yes <i>(Talk to your doctor or pharmacist before taking any non-prescription or herbal medicines)</i>	
<b>Treatments</b>	
<input type="checkbox"/> Be sure to use your inhaler properly.	
<b>Personal Assessment Checklist - Patient to complete</b>	
Please review the statements below and check the appropriate box beside each item. <b>Please ask staff for help if you answered NO to any item</b>	<input type="checkbox"/> AlbertaQuits <input type="checkbox"/> Flip Into Action
	<b>Yes</b> <b>No</b>
1. A staff member watched me use my inhalers and spacers to see if I was doing it correctly	
2. I feel confident using my inhalers	
3. My respiratory medicines were explained to me	

## Discharge Management Plan

## Documentation - HF



### Admission to Discharge Checklist

Heart Failure Admission to Discharge Checklist				
Please complete the following activities related to Heart Failure (HF) patient care. Check the appropriate column as each item is addressed for the patient and/or caregiver(s). Provide additional comments if item is incomplete and when necessary.				
Admission Date (yyyy-MM-dd)	Time (h:mm)			
Activity	Completed			Initial
	Yes	No	N/A	
<b>1. Provide 'Patient Education Resource Package' – Review with patient/caregiver</b>				
a) Heart Failure Management Guide				
b) Nutrition and Lifestyle Choices to Manage HF				
c) Daily Weight Monitoring				
d) Weight Chart				
e) Signs and Symptoms				
f) Benefits of Low Salt (Sodium) Diet				
g) Tobacco use; assess and provide tobacco cessation support resources.				
h) Heart Failure Medicines				

Heart Failure Discharge Management Plan	
Heart Failure Education Resource Package (all handouts identified)	
Heart Failure Education Class (if available)	
Bring this Management Plan with you to your next visit	
<b>Nutrition</b> A salt restricted diet of 2000 mg daily is strongly encouraged (1 tsp = 2300 mg or 2.3 g)	<input type="checkbox"/> Benefits of Low Salt Diet
Dietitian referral <input type="checkbox"/> No <input type="checkbox"/> Yes ▶ Phone _____	
<b>Activity</b> Regular physical activity is part of the recommended treatment for Heart Failure (HF)	<input type="checkbox"/> HF Management Guide
<b>Medications</b> Prescription <input type="checkbox"/> No <input type="checkbox"/> Yes Discharge medication list faxed to community pharmacy <input type="checkbox"/> No <input type="checkbox"/> Yes	<input type="checkbox"/> HF Medicines
<b>Treatments</b>	<input type="checkbox"/> Daily Weight Monitoring
<input type="checkbox"/> Daily Weight – Empty bladder, wear same amount of clothing, weigh before breakfast, record your weight	<input type="checkbox"/> Weight Chart
– Recognize the signs of fluid buildup: Gaining 2 lbs (1 kg) in 2 days or 5 lbs (3 kg) in one week; Swelling in your feet and legs; Bloating of your belly; Increased shortness of breath	<input type="checkbox"/> Signs and Symptoms
<input type="checkbox"/> Monitor for signs and symptoms of heart failure Weight gain, swelling, shortness of breath, fatigue/confusion, persistent coughing or wheezing, heart palpitations, chest pain (angina)	<input type="checkbox"/> Chronic HF Action Plan (green/yellow/red)
	<input type="checkbox"/> Nutrition and Lifestyle Choices to Manage HF

### Discharge Management Plan





Participants are encouraged to participate in session talks.

If you would like us to ask your question, please email during session to:  
**[hfpathway@ahs.ca](mailto:hfpathway@ahs.ca)**

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