Documenting Levels of Engagement in Residents with Dementia: Are the Measures Meaningful?

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Background
The Good Samaritan Society’s Cottage facilities are residences for dementia patients at all stages of disease progression. Several years ago, the society created a form to measure patient engagement. The form was designed to measure patient engagement in three areas: activities of daily living, household tasks, and leisure activities.

The results from this form have been added to the patients’ electronic health record. These results can be used to evaluate residents during care conferences, and generate reports to show trends and assist in care planning. The form was also designed to encourage staff to engage with residents, and focus on their patients’ strengths. If staff are required to regularly pay attention to levels of patient engagement, they may be more likely to involve the patients in activities.

However, the current version of the form has had limited usefulness. This is partly because of the format, and partly because staff have not been consistently using the form.

Objectives
1. Evaluate the patient engagement form used by the Good Samaritan Society’s Cottage facilities.
2. Determine its validity and ease of use, and make revisions if necessary.

Method
Semi-structured interviews were conducted with 17 health care aides, the 2 Cottage managers, and the Best Practice Specialist who originally developed the form. The interviews were audio taped and transcribed for analysis.

The interviews explored the following topics:
1. Does the form gather the information it is supposed to? Is this done in an acceptable way?
2. Is all relevant information about activity level and participation of the patients captured in the form?
3. How user friendly is the form? Is there anything you would change about the appearance or formatting?

The interview transcripts were first examined by employee group, and then results from each group were compared.

Results
Health care aides expressed the following general opinions about the form:
- The purpose of the patient engagement form is to track patients’ daily activities and participation.
- The form helps health care aides know their patients better.
- The section about daily activities is most useful. Then, the section about leisure activities is most useful.
- The form seems to capture appropriate and correct information. It’s easy to fill out, but many people do not complete the comment section.
Managers expressed the following general opinions about the form:

- The purpose of the patient engagement form is to track the possible activities that patients can participate in.
- The information provided in the comment section is very important. This data can be shared with families.
- The whole form provides relevant information. The different sections of the form draw your attention to the specific areas of interest, which makes it easy to complete.
- The comment section is not being used enough. There may be a language barrier preventing health care aides from filling it out because many of them do not speak English as a first language.

The engagement form was revised based on results from the interviews. The Best Practice Specialist and managers oversaw the revisions, including gathering input from staff. After the revision was completed, information sessions were held to educate staff about using the new form. Staff also received some coaching about how to engage in meaningful activities with patients.

Conclusions
Interview results suggested that the content of the patient engagement form was valid. However, there were still inaccuracies in the data because health care aides did not understand the purpose of the form. For example, they were unaware that the form was used to create progress reports which could be used to update patients’ families. For this reason, health care aides often left the crucial comment section blank.

The revised form builds more detail into the structure, so there is less reliance on information gathered from the comment section. Health care aides also received training about the purpose of the form, and were given specific details about how to use the revised form. The reports generated using data from the revised forms have been more detailed, so they provide better patient information. This information can be shared with families and contribute to improving care planning.

Future research should investigate whether use of the form increased staff awareness about the importance of patient engagement.

Lessons Learned
We found that patient engagement forms can contain useful information for both caregivers and families. It is important to ensure that all caregivers understand the purpose and importance of these forms. Providing staff with training can enhance the usefulness of patient engagement forms and improve quality of life. To get the most utility out of the information, the forms need to be simple and tailored to the patient.

The full report can be found at www.mentalhealthresearch.ca

About the Author: Ellen Ayles was formerly with the SKILLS Society. The Skills Society provides support services to children and adults with developmental disabilities, survivors of acquired brain injury, and their families.