

# Asthma Shared Decision Making Clinic

## Quality Control Checklist

### Initial Visit

Patient's MRN: \_\_\_\_\_

Health Coach: \_\_\_\_\_

Site: \_\_\_\_\_

Provider: \_\_\_\_\_

Date: \_\_\_\_\_

Observer: \_\_\_\_\_

#### 1. Set the stage

1.	Patient role in decision making discussed?	1 Not discussed	2	3	4	5 Discussed completely	N/A
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#### 2. Gather patient information

1.	Asthma's effects on daily life	1 No effects assessed	2	3	4	5 All effects assessed	N/A
2.	Asthma symptoms assessed	1 No symptoms assessed	2	3	4	5 All symptoms assessed thoroughly	N/A
3.	Perception of asthma control (using dial on Form #2 "How well controlled is your asthma?")	1 Not assessed	2	3	4	5 Assessed thoroughly with handout	N/A
4.	Asthma related health care utilization (urgent care, ER, hospitalizations)	1 Not assessed	2	3	4	5 Assessed thoroughly	N/A
5.	Chronic rhinosinusitis and GERD symptoms	1 Did not ask any CR or GERD questions	2	3	4	5 Asked all 6 CR and all 3 GERD questions	N/A
6.	Current medication regimen assessed	1 Did not ask any questions about current medications	2	3	4	5 Asked all 4 questions about each medication and clarified any inconsistencies/ confusing responses	N/A
7.	Medical history	1 Did not ask any questions about medication history	2	3	4	5 Asked all questions about each medication history and clarified any inconsistencies/ confusing responses	N/A

8.	Alternative treatments and purpose of using them	1 Did not ask any questions about alternative treatments or their function for patients	2	3	4	5 Asked all questions about alternative treatments and their function for patient	N/A
9.	Inhaler use technique (note: correcting technique may come later)	1 Skills not assessed	2	3	4	5 Skills assessed thoroughly	N/A
10.	Environmental allergens or triggers of the patient's asthma	1 Did not ask any questions about triggers	2	3	4	5 Asked all questions about triggers and clarified any inconsistencies/ confusing	N/A
11.	Identified patient's goals for asthma treatment	1 Did not assess patient	2	3	4	5 Assessed treatment goals thoroughly and clarified	N/A

### 3. Provide information

1.	Initial assessment of patient's asthma knowledge	1 Patient's knowledge not assessed	2	3	4	5 Patient's knowledge assessed thoroughly	N/A
2.	Definition of asthma	1 Definition not provided	2	3	4	5 Thorough, accurate, complete explanation of asthma provided	N/A
3.	Description of inflammation (using model or Form #4)	1 No description of inflammation given	2	3	4	5 Thorough, accurate, complete description of all four aspects	N/A
4.	Role of rescue medication	1 Role of rescue medication not discussed	2	3	4	5 Thorough, accurate, complete description of all four aspects	N/A
5.	Role of triggers	1 Role of triggers not discussed	2	3	4	5 Role of triggers discussed and personalized	N/A
6.	Role of controller medication	1 No description of controllers given	2	3	4	5 Thorough, accurate, complete description of all aspects	N/A
7.	Assessed patient comprehension	1 No assessment of comprehension	2	3	4	5 Thorough and complete assessment of comprehension, with clarifications provided when needed	N/A

## 4. Treatment discussion

1.	Spirometry results	1	2	3	4	5	N/A
		No description of spirometry results given				Thorough, accurate, complete description	
2.	Description of current asthma symptom control using dials of Form #7 "How severe/well-controlled is your asthma"	1	2	3	4	5	N/A
		Did not provide assessment of control				Thorough, accurate, complete description of assessment of control	
3.	Patient's asthma medication feature preferences:	1	2	3	4	5	N/A
		No discussion of medication feature				Thorough and complete discussion of medication feature preferences	
4.	Treatment decision (New Rx or not)	1	2	3	4	5	N/A
		Treatment recommended to patient				Treatment negotiated with patient	

## 5. Wrap-up

1.	Asthma Action Plan	1	2	3	4	5	N/A
		Did not complete an asthma action plan				Thoroughly completed, legible and carefully explained; patient understanding of plan verified	
2.	Handouts on medications prescribed if needed (including diaries)	1	2	3	4	5	N/A
		Did not give patient handouts or explain asthma diary				Gave out patient handouts & explained diary appropriately	
3.	Patient questions 1	1	2	3	4	5	N/A
		Patient was not asked if s/he has questions				Patient was asked if s/he had questions and encouraged	
4.	Patient questions 2	1	2	3	4	5	N/A
		Patient did not ask questions				Patient asked many questions	
5.	Answered patient questions (if asked)?	1	2	3	4	5	N/A
		Patient questions were not answered				Patient questions answered clearly, completely, and	

## 6. Rapport—considering the entire session:

1.	How much rapport was developed with the patient (i.e., patient felt safe, was offered a break)?	1 Limited rapport was developed; patient remained passive	2	3	4	5 A great deal of rapport was developed; patient actively participated	N/A
2.	How much encouragement to ask questions did the health coach provide?	1 Patient not encouraged to ask questions	2	3	4	5 Repeated encouragement given	N/A
3.	How many questions did the patient ask?	1 Patient did not ask questions	2	3	4	5 Patient asked many questions throughout session	N/A
4.	How well were patient questions addressed and answered?	1 Patient questions were not answered	2	3	4	5 Patient questions answered clearly completely and accurately	N/A
5.	Overall, how much of an opportunity was the patient given to provide information on his/her treatment preferences?	1 No opportunity	2	3	4	5 Repeated opportunities	N/A
6.	How much agreement was there between patient and care manager on the treatment decision?	1 No agreement	2	3	4	5 Total agreement	N/A

## Session #1: Quality Control Summary

Section	Goal	Total Points/ Score	Mean for Section	Notes
1	Set the stage	/5	/1	
2	Gather patient information	/55	/11	
3	Provide information	/35	/7	
4	Treatment discussion	/20	/4	
5	Wrap-up	/25	/5	
6	Rapport	/30	/6	
	Total	/170		

### Overall Evaluation of Decision-Making Roles

1. Who made the decisions about asthma treatment?

1. The health coach alone made the decision
2. The health coach mostly made the decision, with the patient playing a small role in the decision-making
3. The patient alone made the decision
4. The patient mostly made the decision, with the health coach playing a small role in the decision-making
5. The patient and the health coach participated equally in making the decision