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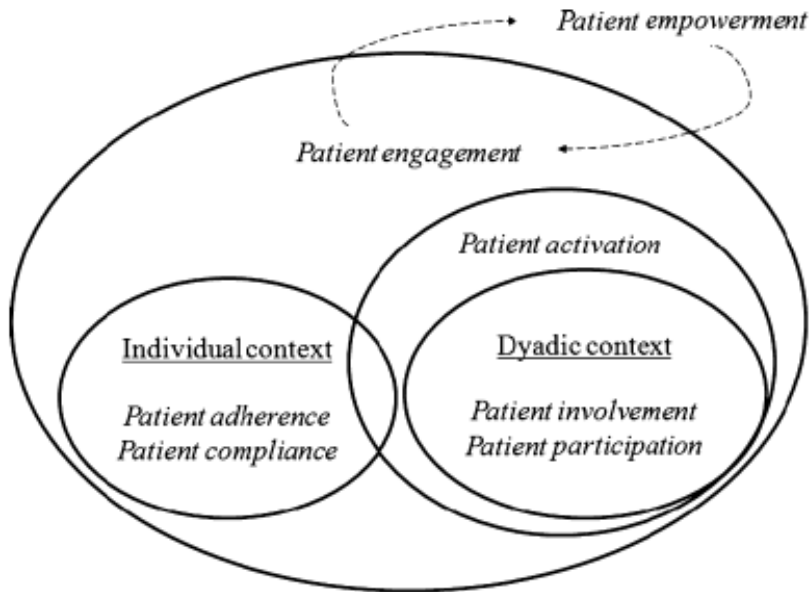


# A Mixed Methods Review of Person and Family Engagement in the context of Multiple Chronic Conditions

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# What are we talking about when we talk about engagement?



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## Giving patients a starring role in their own care: a bibliometric analysis of the on-going literature debate

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**Figure 3** A framework to understand relationships among terms.

# Defining Engagement

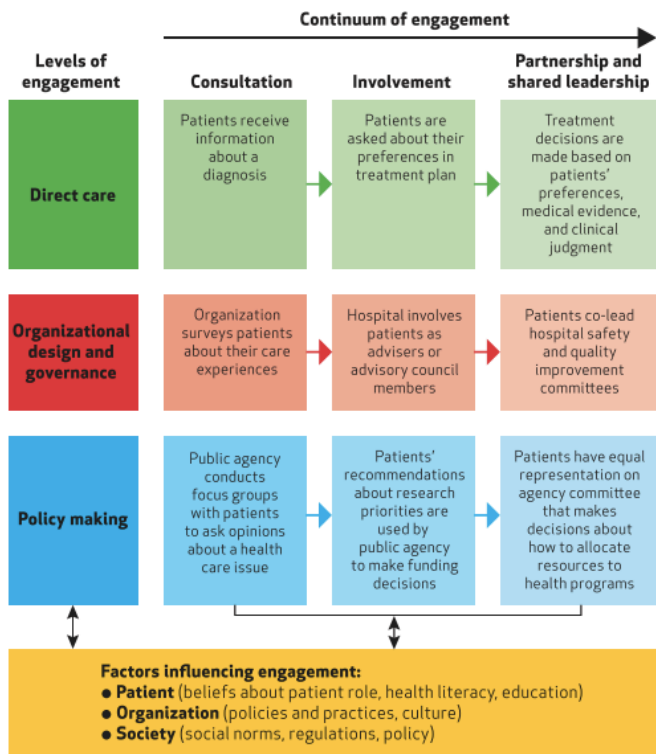


“A **set of behaviors** by individuals, family members, and health professionals and a **set of organizational policies and procedures** that foster both the inclusion of individuals and family members as active members of the health care team and collaborative partnerships with providers and provider organizations.”

# Conceptualizing Engagement

## EXHIBIT 1

### A Multidimensional Framework For Patient And Family Engagement In Health And Health Care



**Definition of engagement:** “Patients, families, their representatives, and health professionals working in active partnership at various levels across the health care system – direct care, organizational design and governance, and policy making – to improve health and healthcare.”

### Purposes of engagement:

- 1) To satisfy desires and expectations of patients and families in healthcare
- 2) To improve health outcomes, quality, and safety
- 3) To control costs

# We undertook a scoping review of reviews that addressed engagement in the context of multiple chronic conditions.

**Interventions to Enhance Patient and Family Engagement Among Adults With Multiple Chronic Conditions: A Systematic Scoping Review**

Olivia Davila, MEd, MPH<sup>1,2</sup>, Amy Diaz, MPH<sup>1,2</sup>, Alexandra Murray, MPH<sup>1,2</sup>, Devon K. Palfy, MPH<sup>1,2</sup>, Clara Salsguber, MPH<sup>1,2</sup>, Carol Golin, MPH<sup>1,2</sup>, and Crystal M. Cline, MD, MPH<sup>1,2</sup>

**Background:** In the United States, 12% of adults and 61% of adults aged 65 and older live with multiple chronic conditions (MCC). Multiple chronic conditions (MCC) are defined as two or more chronic conditions that are associated with increased morbidity and mortality. The purpose of this review was to identify and synthesize the evidence on interventions to enhance patient and family engagement in the context of MCC. We searched the literature for peer-reviewed articles published between 2000 and 2020. We identified 111 articles that met the inclusion criteria. We synthesized the findings of these articles into a scoping review. We identified 111 articles that met the inclusion criteria. We synthesized the findings of these articles into a scoping review. We identified 111 articles that met the inclusion criteria. We synthesized the findings of these articles into a scoping review.

**Conclusion:** This scoping review identified 111 articles that met the inclusion criteria. We synthesized the findings of these articles into a scoping review. We identified 111 articles that met the inclusion criteria. We synthesized the findings of these articles into a scoping review.

**Self-management priority setting and decision-making in adults with multimorbidity: A narrative review of literature**

Lisa C. Bradley<sup>1</sup>, Rebecca J. Slatman, Karen A. Eklif, Eyoung Suk Lee, Esther G. Wand, Kristina L. Ekwelobom

**Background:** Self-management is a key component of chronic disease management. However, the literature on self-management in adults with multimorbidity is limited. This narrative review synthesizes the literature on self-management priority setting and decision-making in adults with multimorbidity. We searched the literature for peer-reviewed articles published between 2000 and 2020. We identified 111 articles that met the inclusion criteria. We synthesized the findings of these articles into a narrative review.

**Conclusion:** This narrative review identified 111 articles that met the inclusion criteria. We synthesized the findings of these articles into a narrative review. We identified 111 articles that met the inclusion criteria. We synthesized the findings of these articles into a narrative review.

**BMJ Open Characteristics of self-management among patients with complex health needs: a thematic analysis review**

Shahar Peleg, Galina Lerman, Maat Christina Chiamaram, Alisa Dahan, Catherine Pothier

**Background:** Self-management is a key component of chronic disease management. However, the literature on self-management in patients with complex health needs is limited. This thematic analysis review synthesizes the literature on self-management among patients with complex health needs. We searched the literature for peer-reviewed articles published between 2000 and 2020. We identified 111 articles that met the inclusion criteria. We synthesized the findings of these articles into a thematic analysis review.

**Conclusion:** This thematic analysis review identified 111 articles that met the inclusion criteria. We synthesized the findings of these articles into a thematic analysis review. We identified 111 articles that met the inclusion criteria. We synthesized the findings of these articles into a thematic analysis review.

**Self-management assessment in multiple chronic conditions: A narrative review of literature**

Devi M<sup>1,2</sup>, Lisa C. Bradley<sup>1,2</sup>, Tessa Roberts<sup>1,2</sup>

**Background:** Self-management assessment is a key component of chronic disease management. However, the literature on self-management assessment in multiple chronic conditions is limited. This narrative review synthesizes the literature on self-management assessment in multiple chronic conditions. We searched the literature for peer-reviewed articles published between 2000 and 2020. We identified 111 articles that met the inclusion criteria. We synthesized the findings of these articles into a narrative review.

**Conclusion:** This narrative review identified 111 articles that met the inclusion criteria. We synthesized the findings of these articles into a narrative review. We identified 111 articles that met the inclusion criteria. We synthesized the findings of these articles into a narrative review.

**Intervention Components Targeting Self-Management in Individuals with Multiple Chronic Conditions: An Integrative Review**

Justina J. Miller, BSN, RN, PhD Candidate<sup>1,2</sup>, Nancy J. Powell, PhD, APRN, FAHA, FAAN, FAANP<sup>1,2</sup>, Wendy Adams, PhD, MN<sup>1,2</sup>, Mary Schumaker, PhD, RN<sup>1,2</sup>, and Christine Ekwelobom, PhD, APRN-C, FPCNS-BC, CNE<sup>1,2</sup>

**Background:** Self-management is a key component of chronic disease management. However, the literature on self-management in individuals with multiple chronic conditions is limited. This integrative review synthesizes the literature on self-management in individuals with multiple chronic conditions. We searched the literature for peer-reviewed articles published between 2000 and 2020. We identified 111 articles that met the inclusion criteria. We synthesized the findings of these articles into an integrative review.

**Conclusion:** This integrative review identified 111 articles that met the inclusion criteria. We synthesized the findings of these articles into an integrative review. We identified 111 articles that met the inclusion criteria. We synthesized the findings of these articles into an integrative review.

**Involving older people with multimorbidity in decision-making about their primary healthcare: A Cochrane systematic review of interventions [abstract]**

JE Robinson<sup>1</sup>, A Patel<sup>2</sup>, S G McHugh<sup>3</sup>, J Bower<sup>4</sup>, E Pechlari<sup>5</sup>, A N Roberts<sup>6</sup>, J Campbell<sup>7</sup>

**Background:** Involving older people with multimorbidity in decision-making about their primary healthcare is a key component of chronic disease management. However, the literature on involving older people with multimorbidity in decision-making about their primary healthcare is limited. This Cochrane systematic review synthesizes the literature on involving older people with multimorbidity in decision-making about their primary healthcare. We searched the literature for peer-reviewed articles published between 2000 and 2020. We identified 111 articles that met the inclusion criteria. We synthesized the findings of these articles into a Cochrane systematic review.

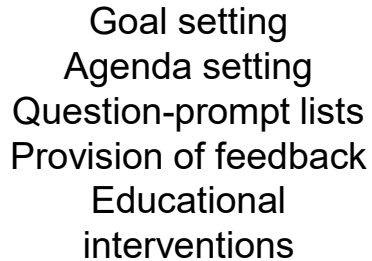
**Conclusion:** This Cochrane systematic review identified 111 articles that met the inclusion criteria. We synthesized the findings of these articles into a Cochrane systematic review. We identified 111 articles that met the inclusion criteria. We synthesized the findings of these articles into a Cochrane systematic review.

“engagement”

Self-management

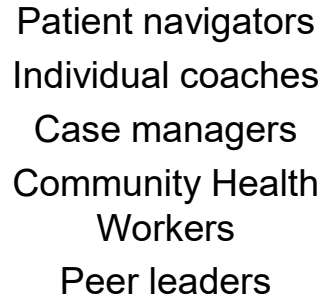
Involvement in decision-making

# Interventions aimed to promote engagement among those with MCC vary widely.



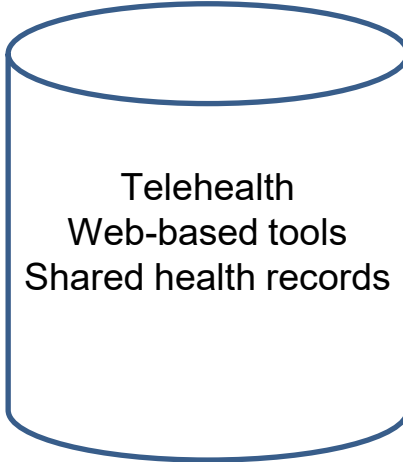
Goal setting  
Agenda setting  
Question-prompt lists  
Provision of feedback  
Educational interventions

**Preparation**



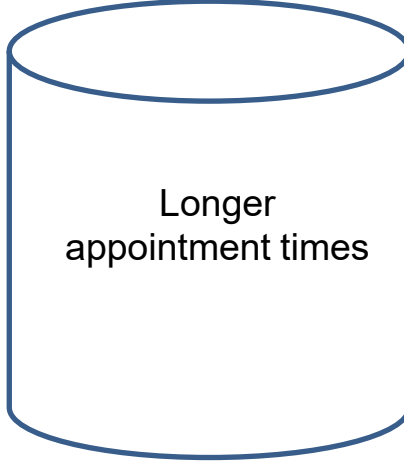
Patient navigators  
Individual coaches  
Case managers  
Community Health Workers  
Peer leaders

**Personnel**



Telehealth  
Web-based tools  
Shared health records

**Technology**



Longer appointment times

**Practice-level changes**

# Building the science of engagement in the context of MCC is limited by heterogeneity.



*Tremendous heterogeneity in:*

- the concept and measurement of engagement
- the population of interest (those with multiple chronic conditions)
- the design of complex interventions
- outcomes

# #1: Goals of engagement and outcomes that matter most for persons with MCC

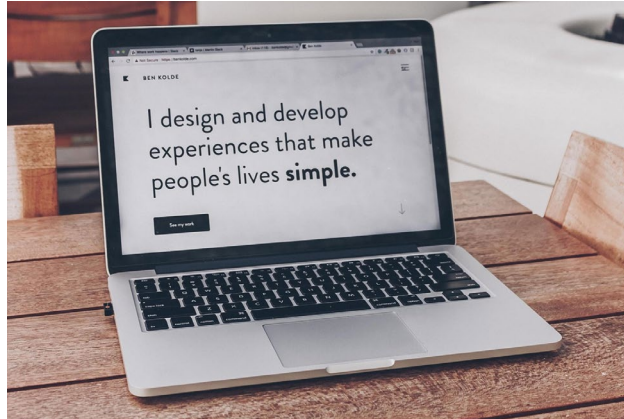
- How can we best ensure that study goals and outcomes align with the goals and desired outcomes of persons with MCC?
- How do we measure these goals and outcomes in a way that allows comparisons among different interventions and studies?



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## #2: Infrastructure



- How do system-level and community-level structural factors relate to engagement in direct care for those with MCC?
- How do system- and community-level factors interfere with or support engagement, and how do we design a system that *makes it easy*?

# #3: Tradeoffs between benefits and costs of engagement

- What safeguards need to be put in place to ensure that a focus on engagement doesn't unintentionally further marginalize vulnerable populations, including those with multiple chronic conditions?
- How do we engage vulnerable or hard-to-engage populations in research about engagement and to guide implementation of engagement interventions?



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