

# Beneficiary Education & Self-Management

Effective Date: 10/19/2017

Draft/Review Date: 10/19/2017

## Policy

- A. It is the policy of the ACO to provide Beneficiary education and strive toward self-management on an ongoing basis in an effort to enable Beneficiaries to be independent and have a plan for their involvement in the care process.

## Applicability

This policy and procedure applies to all Participants, Providers/Suppliers, and other individuals or entities performing functions or services related to the ACO's activities.

## Procedure

- A. The Quality Improvement & Care Coordination (QICC) Subcommittee will assess education and training needs of Beneficiaries for an overall plan to encourage education and self-management. The ACO will provide guidance to Participants, Providers/Suppliers, and other individuals or entities performing functions or services related to the ACO's activities as to identified needs and any materials available to the entire population.
- B. The Care Coordination team will assist Participants, Providers/Suppliers, and other individuals or entities performing functions or services related to the ACO's activities with providing appropriate educational materials and self-management tools. The educational materials and self-management tools may relate to wellness and prevention, procedure recovery, disease management, medications, end-of-life care, or other resources specific to the Beneficiary's needs. Educational materials provided to Beneficiaries and their caregivers will be appropriate for their cultural and linguistic needs, and consideration will be given to their reading level. Referral to education and training programs may be used to enhance the self-management capabilities of the Beneficiary.
- C. **[Best Practice]** Educational materials, including individual Beneficiary materials and group presentations, should be screened for commercial messages regarding services or supplies and scrutinized for quality, appropriateness and any conflicts of interest.
- D. **[Best Practice]** Participants, Providers/Suppliers, and other individuals or entities performing functions or services related to the ACO's activities should determine, as an inter-disciplinary team, what type of education is best for each situation. Some Beneficiaries may benefit from group learning while others may require individual attention.
- E. **[Best Practice]** Participants, Providers/Suppliers, and other individuals or entities performing functions or services related to the ACO's activities should document in the Beneficiary's medical record each time educational materials, self-management support, or referrals are provided to increase Beneficiary knowledge and self-management.

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- F. All materials should follow the Marketing Guidelines for ACOs, be reviewed at least annually, and be reviewed and approved by Collaborative Health Systems (CHS) Marketing and Compliance. Any questions related to education and training approvals should be sent to the Compliance Officer.

### Reporting

- A. N/A

### Related Documentation

- A. 42 CFR §425.112, §425.310
- B. ACO Application Narratives: Promoting Beneficiary Engagement, Promoting Coordination of Care, Promoting Evidence-Based Medicine
- C. ACO Terms & Definitions Policy
- D. Medicare Shared Savings Program Quality Measures
- E. Oversight of Marketing Materials Policy