

The Basic 8 Framework: Effective Self-Management Skills for People With Chronic Conditions



The Basic 8 is a simple framework that identifies key priorities for self-managing a health condition and promoting health. You can use the Basic 8 to empower individuals to participate in their care and engage them in creating personalized care plans.



*Click on a section of the wheel.
You'll be taken to more information
on that topic.*

Engagement Tip: Provide the person you are helping with a copy of the self-management health aid, “Managing Your Chronic Condition: The Basic 8 Framework,” posted on ArchiTools. Then use this job aid to talk about each of the eight priorities.



Know When and How to Contact Your Doctor

This first priority focuses on the importance of knowing when a health condition is worsening so that urgent and emergency situations can be prevented or addressed quickly and effectively. This priority also emphasizes the importance of seeing a primary care doctor or other healthcare professional on a regular basis and communicating health changes to the doctor.

The Care Team's Role*

Discuss warning signs and symptoms.^{1,2,3}

Reinforce what the individual should do when she or he experiences warning signs or symptoms (for example, take a certain medication call the doctor, or seek emergency care).

*Work with individuals to create an easy-to-follow action plan.*⁴

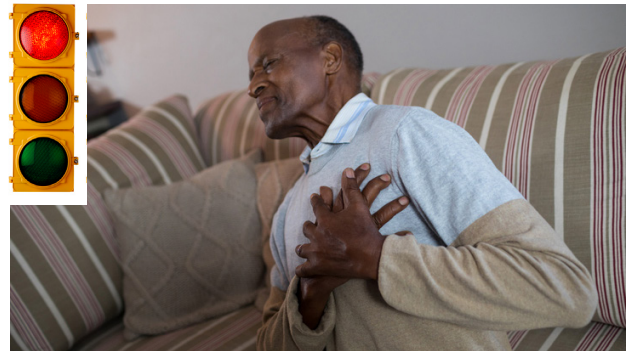
Some organizations have adopted the red-yellow-green colors of a traffic light to help organize action plans.^{5,6,7}



Green: Focus on the maintenance actions individuals should take when they are feeling well. For instance, reinforce how heart failure patients need to assess their symptoms, weigh themselves daily, eat a low-sodium diet, and take their medications.⁵



Yellow: Discuss the steps individuals need to take when they experience warning signs. For example, when people with asthma have trouble breathing, they need to consider taking their quick-relief medication.⁶



Red: Help individuals recognize the signs and symptoms that mean they need to call the doctor immediately or seek emergency care. For instance, if someone with heart failure has trouble breathing while resting, they should consider that a sign to call a doctor or seek emergency treatment.⁵

*Encourage a regular relationship with a primary care doctor or other health care professional.*⁸ Encourage two-way communication with individuals and respect their values and preferences. Good communication is linked to increased patient satisfaction.^{8,9}

*The term "care team" is used throughout this job aid to encompass doctors, nurses, pharmacists, care management staff, and others who help individuals build the self-management skills required to more effectively manage health conditions.



Learn About Your Condition and Set Goals

This priority has two objectives: help individuals learn about their health conditions and then help them set goals to better manage those conditions.

The Care Team's Role*

Teach individuals about their health conditions. Educate individuals about their chronic conditions, including how to manage symptoms.³ As people gain knowledge about their conditions, they become empowered to take better care of themselves.^{3,10}

The first step is to find out what individuals need to know, as well as how much information they're ready to take in. One strategy called "Ask-Tell-Ask" can help make your education more meaningful and useful for individuals.^{11,12}

Ask Use open-ended questions to explore what the individual knows, thinks, or feels about their health.	Tell Or share the information that is requested.	Ask Follow up with questions that ensure the information you provided is well understood.
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For more on Ask-Tell-Ask and other communication tactics, search for the job aid *Effective Communication Strategies: Helping People Understand and Remember Health Information* on ArchiTools.



Collaborate with individuals to set personal health goals. Engage in a dialogue to uncover personal health outcomes and care preferences, and assess what individuals are ready to accomplish. Then, help them translate these preferences into specific and realistic health goals.¹³

When talking with individuals about health goals, let them help set the agenda. You might start by asking the person some open-ended questions about what they want to achieve. Or you might suggest a few ideas and then end with an open-ended question.¹¹

For example: *"What would you like to focus on today? We might discuss taking your medication as prescribed, or quitting smoking. Or maybe there's something you want to focus on?"*

For more on helping individuals set specific and realistic health goals, search for the job aid *Motivating People to Make Healthy Changes* on ArchiTools.



Take Your Medicines Correctly

Medication nonadherence is a major problem. About 125,000 deaths each year in the United States are caused by nonadherence.¹⁴ This priority is focused on helping improve medication adherence.

The Care Team's Role

Take time to discuss medication details and concerns with individuals. One study found that patients would like to know the following information about medications:¹⁴

- ▶ What is the name of the drug?
- ▶ How do I take the drug?
- ▶ For how long do I have to take it?
- ▶ Why am I taking it?
- ▶ What are its potential benefits?
- ▶ What are the potential side effects?

Be sure to address any concerns or questions the person may have. Some reasons for not taking medication as prescribed include:¹⁵

- ▶ Not understanding the instructions
- ▶ Forgetting to take the medication
- ▶ Difficulty taking multiple prescription medicines
- ▶ Side effects
- ▶ Cost of the drug
- ▶ Medication doesn't appear to be working

Help people build the necessary skills to take their medication as prescribed.

Engage individuals in problem-solving and explore ways to integrate taking medication into their daily lives. For instance, you might discuss using a calendar, a pillbox, or a medicine tracker on their computer, smartphone, or tablet.¹⁴

Build and maintain trust. Medication adherence is higher when individuals trust their doctor and other caregivers.¹⁶





Get the Tests and Services You Need

This priority focuses on the prevention and early detection of diseases, as well as management of chronic conditions. It involves getting necessary tests, screenings, and vaccines.

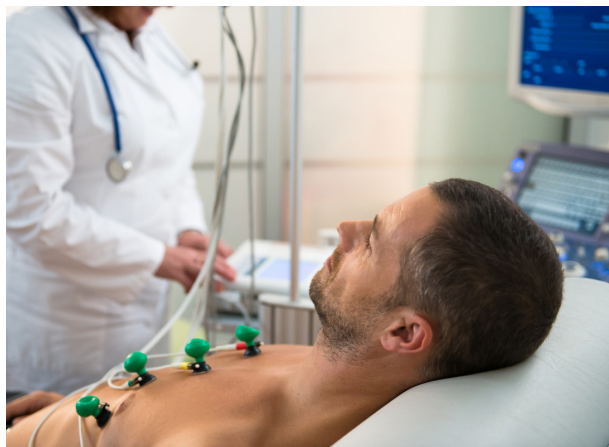
The Care Team's Role

Talk about why the person needs various tests, screenings, and vaccines. Encourage the person to take an active role in his or her health by getting the following:^{1,17}

- ▶ Tests to monitor chronic conditions
- ▶ Recommended screenings to detect other diseases
- ▶ Vaccines to prevent pneumonia and other illnesses.

Help individuals understand and act on test results. The American Medical Association recommends the following guidelines:¹⁸

- ▶ Communicate results in easy-to-understand language.
- ▶ Give patients any information they need to make decisions about medical treatments.



Act to Keep Your Condition Under Good Control

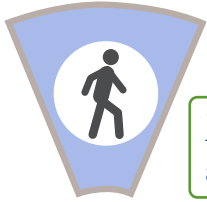
This priority builds on the previous Basic 8 priorities. Individuals who have an ongoing relationship with a doctor, who have learned about their condition, and who understand their treatment plan can begin to monitor their condition and respond appropriately to changes in their symptoms.



The Care Team's Role

Reinforce the importance of monitoring symptoms and important health information. Encourage individuals to keep a health diary to track numbers that are important to monitor for their chronic condition, such as blood pressure readings. In the log, they should also jot down symptom-related information, such as the following:¹⁹

- ▶ What is the symptom? When did the symptom occur (date/time)?
- ▶ How bad is the symptom on a scale of 1 to 10, with 10 being the worst?
- ▶ What might have triggered the symptom (for example, exercise, sunlight, certain foods)?
- ▶ How did the symptom affect any numbers that are important to track for the individual's condition (for example, blood pressure, blood sugar, peak flow meter readings)?



Make Lifestyle Changes and Reduce Your Risks

This Basic 8 priority encourages individuals to make meaningful changes in their behavior to positively impact their condition.

The Care Team's Role

Help individuals develop realistic goals for healthy changes. You can support them by soliciting their input and working with them to develop realistic goals that matter to them.¹³

A good place to start is determining how to motivate people to pursue lifestyle changes. Search for the job aid, *Motivating People to Make Healthy Changes*, on ArchiTools. You will learn about the ingredients of motivation, and how to help people set S.M.A.R.T goals, which can help improve the likelihood that they will successfully make healthy changes.



Build on Your Strengths and Overcome Obstacles

This Basic 8 priority encourages individuals to make meaningful changes in their behavior to positively impact their condition.

The Care Team's Role

Offer support and empathy. Consider asking the individual what a typical day is like. Prompt the person to learn more details. For instance, you might say, “*Tell me about a typical day in your life, from beginning to end. What are some of the problems you encounter or things that you struggle with?*”¹¹

Encourage them to seek social support. You might suggest a relevant community support group.¹⁹

Promote self-worth and hope. Ask the person to share some small achievements in her or his day. Examples might include calling a friend or getting out of bed when she or he didn't want to.¹¹

Help people reframe negative thoughts. For instance, if someone says, “*I've failed to lose weight several times,*” encourage him or her to use the term “*tried*” instead of “*failed.*” Then commend that person for trying and encourage persistence.²⁰

Assist with goal setting related to coping. As you work together to set healthy goals, brainstorm strategies and discuss realistic, short-term goals the person can adopt to improve her or his emotional health,¹¹ such as stress-relief tactics or seeking social support.

Screen for depression and other mental health problems. Depression is more common in people with chronic diseases.²¹



Prepare for Your Doctor Appointments

The final priority reinforces the theme of empowerment that runs through the Basic 8. This priority encourages people to take an active role in preparing for and participating in doctor appointments.

The Care Team's Role

Coach people to prepare for doctor appointments. Ask them to prepare a summary of how they've been feeling to share with the doctor, as well as a list of any concerns or questions they have. Also, remind them to bring their medication list and health diary to their visit, as well as any

test results and notes from other doctor visits. Finally, encourage them to actively ask questions when they don't understand.⁸

Follow up with individuals after visits to the emergency department or hospital.

This creates an opportunity to discuss any needs the individual has and may help prevent hospital readmissions.²²

For more on preparing for doctor appointments, search for "Make the Most of Your Medical Appointment" toolkit on ArchiTools.





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