

# Patient Partner Contributions to Knowledge Translation & Exchange in a Primary Care Research Program on Case Management for People with Complex Care Needs

Jennifer Taylor, Donna Rubenstein, Judy Porter, Linda Wilhelm,  
Mike Warren, Mathieu Bisson, Mireille Lambert,  
Charlotte Schwarz, Shelley Doucet, Catherine Hudon



# Our PriCARE Team



# Presentation Outline

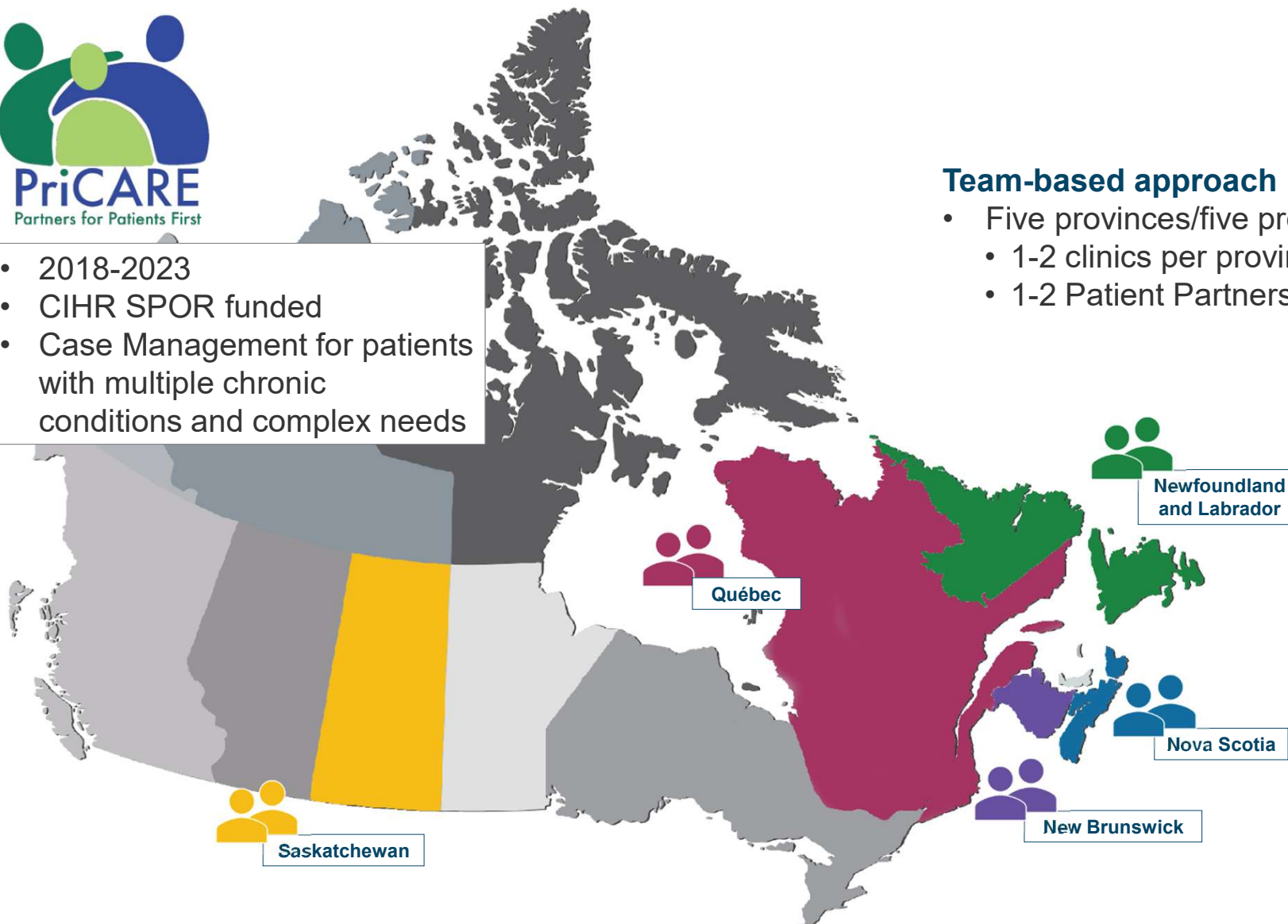
- Project Overview
- Ingredients for impactful KT
- Explore your hidden 'assets'
- Resulting Contributions



- 2018-2023
- CIHR SPOR funded
- Case Management for patients with multiple chronic conditions and complex needs

### Team-based approach

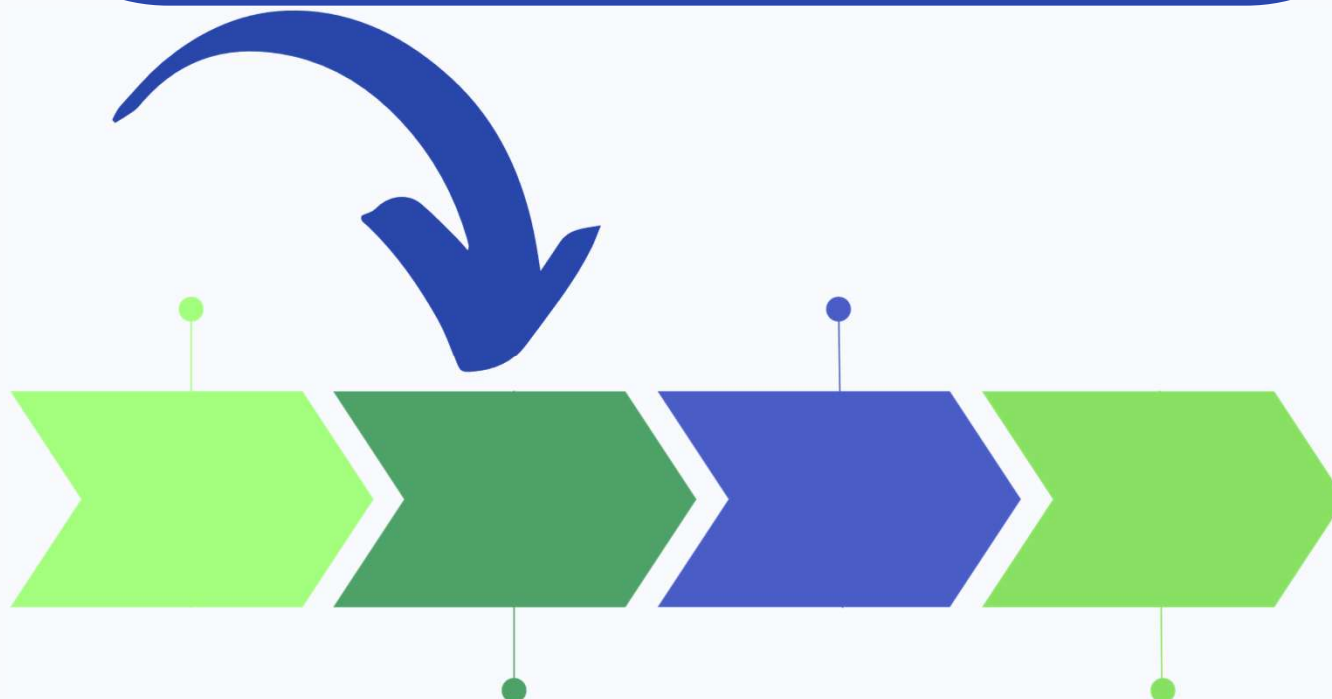
- Five provinces/five project teams
- 1-2 clinics per province
- 1-2 Patient Partners per province



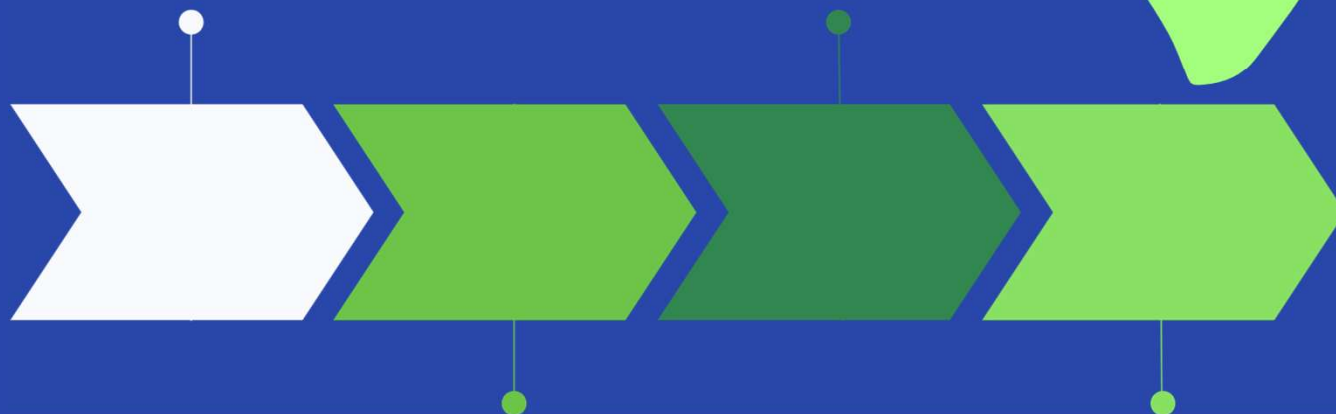


# **INGREDIENTS FOR IMPACTFUL KT**

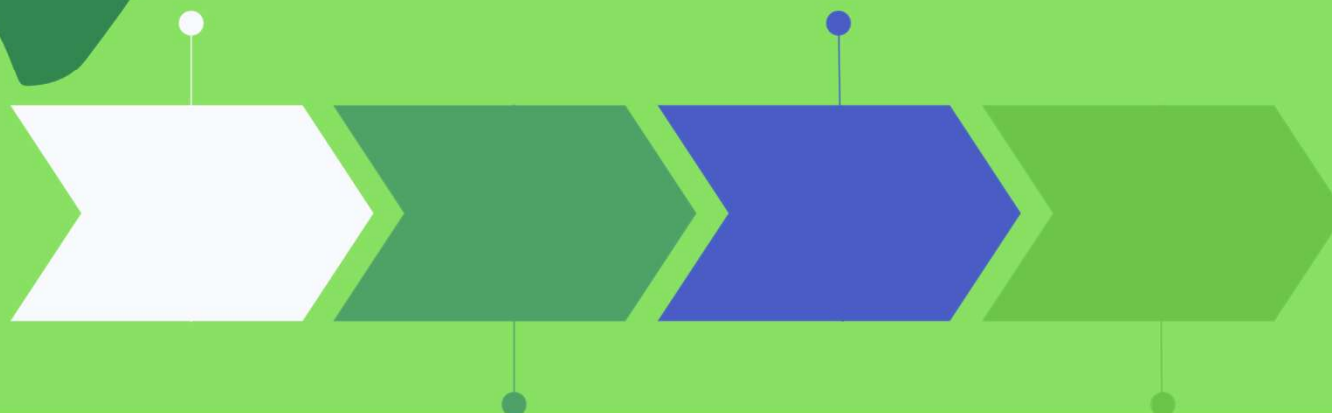
Patient Partners (PPs) are often added in the middle of a project



Focus on Knowledge Translation  
is often during the  
latter stages of a project



Both Patient Partner involvement  
and Knowledge Translation  
should start at the beginning  
of the project





# THE MAKING OF A GREAT PATIENT PARTNERSHIP



FULLY INTEGRATED  
MEMBERS



FROM BEGINNING TO  
END



RESPECT FOR  
LIVED EXPERIENCE



RECOGNITION OF ALL  
SKILLS & KNOWLEDGE



## FULLY INTEGRATED MEMBERS



FULLY INTEGRATED  
MEMBERS

= IMPACT

- PPs have a full voice at the table
  - PPs invited to participate in all activities
  - PPs supported where experience lacking
  - PPs recognized for contributions
-

## FROM BEGINNING TO END



FROM BEGINNING TO  
END

= IMPACT

- PPs bring important information to each stage of a project
- Participation throughout deepens understanding; enhancing KT work

# RESPECT FOR LIVED EXPERIENCE



RESPECT FOR LIVED  
EXPERIENCE

= IMPACT

- PPs real life experiences make them experts at the table
- PPs see the system connections and bring insights missing from the clinician or academic lens



# **EXPLORE YOUR HIDDEN 'ASSETS'**

# RECOGNITION OF WHOLE PERSON



RECOGNITION OF  
SKILLS

= IMPACT

- PPs bring so much more to the project than their lived health experience
- PPs bring professional skills and talents as well as community experience

# FOR EXAMPLE - OUR PRICARE PPS

PAST WORK EXPERIENCE

NETWORKING SKILLS

PUBLIC SPEAKING

PHOTO/GRAPHIC DESIGN

GOVERNMENT EXPERIENCE

STORY TELLING

LIVED HEALTH EXPERIENCE

PROJECT MANAGEMENT SKILLS

VOLUNTEERISM

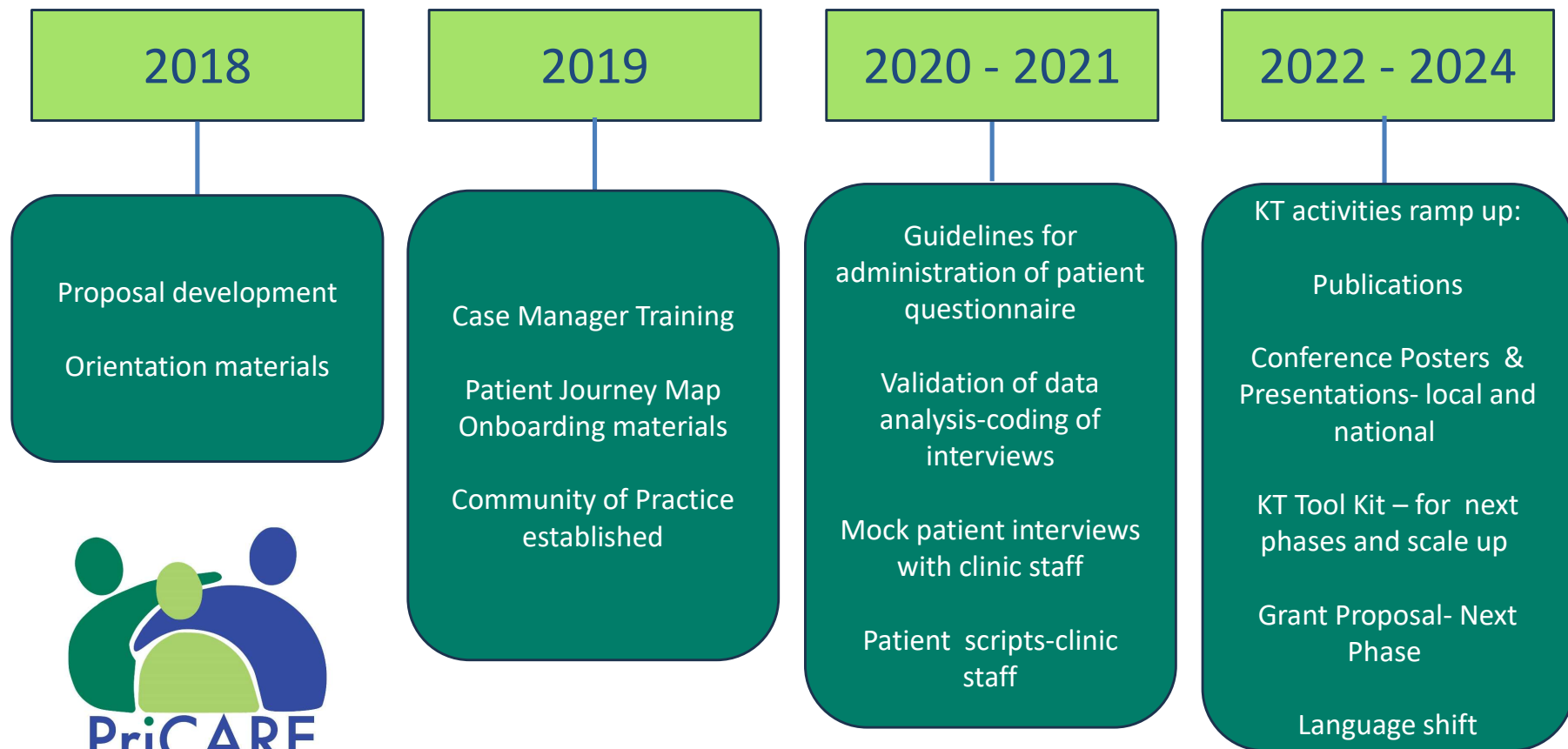
CROSS CULTURAL EXPERIENCE



# **RESULTING CONTRIBUTIONS**

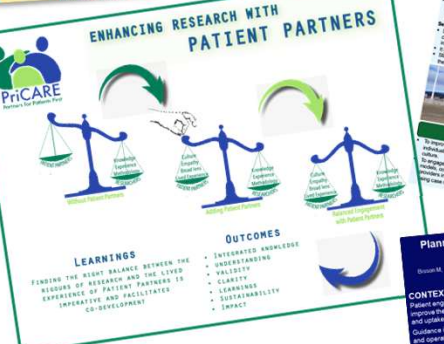


# PATIENT PARTNERS BRING VALUE TO KT ACTIVITIES



**Case management in primary care for frequent users of healthcare services with chronic diseases and complex care needs: protocol of an implementation and realist evaluation**

Methodology



**Reconciling Validity and challenges of patient comfort and understanding : Guidelines to Patient Questionnaires**

**A Patient Partners Perspective :**  
Presented by Judy Porter and Donna Rubenstein

- Catherine Hudson, Ayla Danish, Mireille Lambert, Dana Howse, Monique Cassidy, Olivier Dumont, Vivian R. Ramsden, Mathieu Bisson, Maud-Christine Chouinard, Judy Porter, Donna Rubenstein



**Sturgeon Lake First Nation: Co-Created Case Management in Primary Care with Individuals who have Chronic Diseases and require Complex Care**

Context

Methods

Results

Conclusions

**Patient Engagement Works**

Patient and researcher experiences of patient partnership in research

NAPCRG 2021 Annual Meeting

Dana Howse, Judy Porter, Donna Rubenstein, Charlotte Schwarz, Cathy Scott, Mike Warren, Linda Wilhelm, Kris Scott, Maud-Christine Chouinard, Aubrey-Bassler, Fred Burge, Maud-Christine Chouinard, Shelley Doucet, Mathieu Bisson, Chouinard, Shelley Doucet, Olivier Dumont, Alannah Delahunty-Pike, Judy Porter, Samson, Mireille Lambert, Catherine Hudson

**Implementation analysis of a case management intervention for people with complex care needs in primary care: a multiple case study across Canada**

Catherine Hudson<sup>1</sup>, Mathieu Bisson<sup>1</sup>, Maud-Christine Chouinard<sup>1</sup>, Alannah Delahunty-Pike<sup>1</sup>, Mireille Lambert<sup>1</sup>, Dana Howse<sup>1</sup>, Charlotte Schwarz<sup>2</sup>, Olivier Dumont<sup>3</sup>, Samson<sup>4</sup>, Kris Aubrey-Bassler<sup>5</sup>, Fred Burge<sup>6</sup>, Maud-Christine Chouinard<sup>7</sup>, Vivian R. Ramsden<sup>8</sup>, Alison Luke<sup>9</sup>, Marilyn Macdonald<sup>10</sup>, André Gaudreau<sup>11</sup>, Judy Porter<sup>12</sup>, Maud-Christine Chouinard<sup>13</sup>, Cathy Scott<sup>14</sup>, Mike Warren<sup>15</sup> and Linda Wilhelm<sup>16</sup>

**La flexibilité dans le partenariat en recherche axée avec et pour les patients**

PriCARE Partners for Patients First

**Planning, operationalizing, and evaluating patient partners' engagement in primary care research: a logic model**

Context

Methods

Results

Conclusions

**Case management in primary care for frequent users of healthcare services with chronic diseases and complex care needs: the PriCARE study**

PriCARE Partners for Patients First

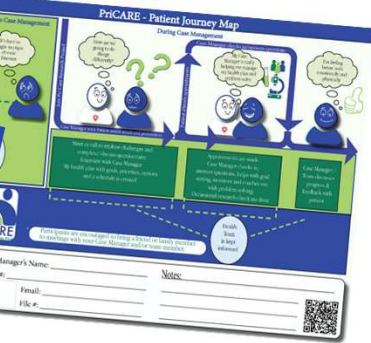
**About Us**

Implementing and evaluating a case management intervention in ten primary care clinics from five Canadian provinces (Quebec, Ontario, Alberta, Saskatchewan, and Manitoba) with research and clinical staff, researchers and patients in partnership with patients

**Website**

<https://engr.cherche.usherbrooke.ca/pri-care-program/>

**Primary healthcare Case management Realist Evaluation**



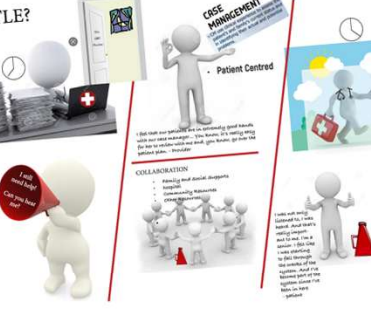
**BMJ Open Protocol for a mixed-method analysis of implementation of case management in primary care for frequent users of healthcare services with chronic diseases and complex care needs**

Open access



**Meaningful patient-oriented research: Working together on a collaborative multi-provincial study**

Linda Wilhelm, Jennifer Taylor and Charlotte Schwarz



**Integrating research in primary care settings: challenges and lessons from the PriCARE case management study in Nova Scotia PHC**

PriCARE Partners for Patients First

**From Start to Finish: Added Value of Patient Partners in the PriCARE Program**

Presented by Judy Porter, Mike Warren and Dana Howse

• Judy Porter, André Gaudreau, Donna Rubenstein, Norma Rabbitts, Jennifer Taylor, Mike Warren, Linda Wilhelm, Mathieu Bisson, Dana Howse, Mireille Lambert, Charlotte Schwarz, Shelley Doucet, Kris Aubrey-Bassler, Vivian R. Ramsden, Catherine Hudson

**Implementing Case Management in Primary Care: Findings and reflections from a multi-province SPOR Study**

PriCARE Seminar - March 22, 2022

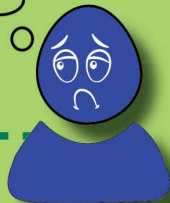
**PriCARE Partners for Patients First**



# PriCARE - Patient Journey Map

## Prior to Case Management

It's hard to juggle multiple chronic illnesses

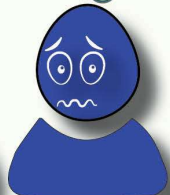


Family Practice is main source of information and support

## During Case Management

Join Pri Care Research Project

How are we going to do things differently?



Case Manager with Patient assess needs and preferences

Meet or call to explore challenges and complete/ discuss questionnaire  
Interview with Case Manager  
My health plan with goals, priorities, options and a schedule is created

Case Manager checks in/answers questions

My Case Manager is really helping me manage my health plan and problem solve



Patient attends appointments

Appointments are made.  
Case Manager checks in, answers questions, helps with goal setting, monitors and coaches me with problem solving.


I'm feeling better both emotionally and physically



Case Manager / Team discusses progress & feedback with patient



# **THREE TAKEAWAYS**

- 1. BRING PPS IN EARLY**
  - 2. INCLUDE PP'S AS FULL MEMBERS OF THE TEAM**
  - 3. RECOGNIZE PPS BRING MORE TO THE TABLE  
THAN THEIR HEALTH EXPERIENCE**
- 



I see that you choose  
to do research without  
Patient Partners.  
I, too, choose to live  
**DANGEROUSLY**

# QUESTIONS

Donna Rubenstein - [donnaruben@gmail.com](mailto:donnaruben@gmail.com)

Judy Porter - [novaskoshun@hotmail.com](mailto:novaskoshun@hotmail.com)