Reference Guide for Individual Patient Education

Integrating a Plan of Action for Life

Educational topics:
1. Prevention and management of COPD exacerbations
   - Reasons for using an Action Plan and its structure
   - Contact list
   - Baseline symptoms and the actions to be taken to remain stable
   - Actions to be taken to prevent and manage COPD exacerbations in different situations
     - Worsening of symptoms due to a respiratory infection
     - Worsening of symptoms due to exposure to environmental Factors
     - Worsening of symptoms due to emotions / stress
   - Actions to be taken when there is no improvement or further deterioration of symptoms
   - Actions to be taken when there are signs of danger
# PREVENTION AND MANAGEMENT OF COPD EXACERBATIONS

## General Objective

The content of this section aims to help the COPD patient and family to prevent and manage exacerbations early.

## Patient / Family Specific Objectives

1. To use an action plan to prevent and manage COPD exacerbation early.
   - Understand the importance of having an action plan and its structure
   - Know the resource persons, how and when to contact them
   - Recognize quickly a worsening of symptoms and its causes
   - Follow step by step the directives included in the different sections of the action plan and take at the right time the appropriate actions to prevent or manage an exacerbation

## “Living Well with COPD” resources

- Reference guide for individual patient education, “Integrating a Plan of Action for life”, section: Prevention and Management of COPD exacerbations
- Patient/family learning module: Integrating a Plan of Action into your life
- Summary Guide, p. 31-34
- Flipchart sections:
  - Your Plan of Action
  - Written Plan of Action
  - MRC scale (Attachment 1)

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<tr>
<td>Reasons for using an Action Plan and its structure</td>
<td>1. Ask patient/family what they know about COPD exacerbations and what they do to prevent or manage a worsening of symptoms. [1]</td>
<td>Explains what is a COPD exacerbation</td>
<td>According to you, what is a COPD exacerbation?</td>
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<td>2. Discuss with patient/family the importance of having an Action Plan to prevent and manage exacerbations. [2]</td>
<td>Explains the reasons for using an Action Plan</td>
<td>Tell me why you should use an Action Plan</td>
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<td>3. Present the sections of the Action Plan <em>(use the patient’s written action plan)</em> and ask patient to summarize the key elements included. [2]</td>
<td>Names the different sections included in an Action Plan and points out the key elements</td>
<td>What is included in an Action Plan? Can you tell me what are the important elements to remember?</td>
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<tr>
<td>Contact list</td>
<td>1. Ask patient/family if he* knows whom to contact when he needs help. [1]</td>
<td>Describes what he does when he needs help</td>
<td>What do you do when you need help? (e.g. call the contact person, go to the ER)</td>
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<td>2. Review with patient/family the list of resource persons he can contact, how and when they should contact them. [2]</td>
<td>Describes how and when to contact each of his resource persons</td>
<td>Who are your resource persons, how and when should you contact each of them? (e.g. physician, pharmacist…)</td>
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| Baseline symptoms and actions to be taken to remain stable | 1. a. Ask patient to describe his usual COPD symptoms. [1]  
   b. Establish patient’s baseline condition [1,2]:  
      i) level of SOB according to MRC scale *(attachment 1)*  
      ii) sputum colour, amount and consistency  
      iii) other symptoms (e.g. cough) | Describes his baseline COPD symptoms | Could you describe your daily symptoms?  
   How is your shortness of breath? *(use the 5 levels of the MRC scale)*  
   Can you describe the characteristics of your sputum (frequency, color, volume, consistency)?  
   Do you have any other symptoms? Describe your cough |
| | 2. a. Ask patient what he does to keep his health condition stable. [1]  
   b. Review with patient/family all the actions to be taken to remain stable. [2] | Describes which actions to take to keep his health condition stable | What should you do to keep your health condition stable? |

*For simplicity, the pronouns 'he', 'his' and 'him' in this reference guide will refer to both males and females. It is not intended to isolate any one particular gender.

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<td>Worsening of symptoms due to a respiratory infection and actions to be taken to prevent or manage the infection</td>
<td>1. a. Ask the patient to describe how his COPD symptoms get worse when he has a respiratory infection. [1] b. Review with patient/family possible changes in symptoms in the presence of a respiratory infection (changes in sputum and shortness of breath). [2]</td>
<td>• Describes the changes in his COPD symptoms related to a respiratory infection</td>
<td>• Which changes in your COPD symptoms should tell you that you have a respiratory infection?</td>
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<td>2. a. Ask patient what he does when his COPD symptoms get worse due to a respiratory infection. [1] b. Review with patient/family, through a case scenario, the actions to be taken to prevent or manage an exacerbation due to a respiratory infection. Emphasize on the recommended delay of action. [2, 11]</td>
<td>• Describes which actions to take to prevent and manage early an exacerbation due to a respiratory infection</td>
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<td></td>
<td>Worsening of symptoms (exacerbation) due to environmental factors and actions to be taken to manage it</td>
<td>1. a. Ask the patient to describe how his COPD symptoms get worse when he is exposed to aggravating factors in the environment. [1] b. Review with patient/family possible changes in his COPD symptoms in the presence of aggravating factors in the environment. [2]</td>
<td>• Describes changes in his COPD symptoms related to environmental factors</td>
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<td></td>
<td>2. a. Ask patient what he does when his COPD symptoms get worse due to environmental factors. [1] b. Review with patient/family through a case scenario the actions to be taken to prevent or manage an exacerbation due to environmental factors. Emphasize on the recommended delay of action. [2, 11]</td>
<td>• Describes which actions to take to manage an exacerbation due to environmental factors.</td>
<td>• What do you do when you are exposed to _______ and your COPD symptoms get worse? (Give some examples of factors) • What should you do to manage a worsening of your symptoms due to aggravating factors in the environment? • What should you do first? • What should you do after?</td>
</tr>
<tr>
<td>Worsening of symptoms (exacerbation) due to emotions/stress and actions to be taken to</td>
<td>1. a. Ask the patient to describe how his COPD symptoms get worse when he is exposed to emotions/stress. [1] b. Review with patient/family possible changes in symptoms in the presence of emotions/stress. [2]</td>
<td>• Describes changes in his COPD symptoms related to emotions/stress</td>
<td>• Which changes in your respiratory symptoms do you notice when you are exposed to strong emotions/stress?</td>
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| manage it                                       | 2. a. Ask patient what he does when his COPD symptoms get worse due to emotions/stress. [1]  
  b. Review with patient/family through a case scenario the actions to be taken to prevent or manage an exacerbation due to emotions/stress. Emphasize on the recommended delay of action. [2, 11] | • Describes which actions to take to prevent or manage an exacerbation due to emotions/stress. | • What do you do when you are exposed to strong emotions or stress and your COPD symptoms get worse?  
  • What should you do to manage a worsening of your symptoms due to strong emotions or stress?  
  • What should you do first?  
  • What should you do after? |
| No improvement or further deterioration of symptoms and actions to be taken | 1. Ask patient how he recognizes if there is an improvement or not on his COPD symptoms. [1] | • Describes how to recognize whether his COPD symptoms have improved or not | • How do you know if your symptoms have improved or not, or have further deteriorated? |
|                                                | 2. Review with patient/family the actions to be taken when there is no improvement or there is further deterioration in his COPD symptoms. [2] | • Describes actions to be taken when his COPD symptoms do not improve or get worse | • What should you do if your symptoms do not improve or get worse? |
| Signs of danger and actions to be taken        | 1. a. Ask patient how he recognizes that he is in danger. [1]  
  b. Review with patient/family what are the symptoms related to a dangerous situation. [2] | • Describes the possible changes in symptoms related to a situation of danger | • Have you already been in a dangerous situation?  
  • Which symptoms tell you that you are in danger? |
|                                                | 2. Review with patient/family the actions to be taken when the patient is in danger. [2] | • Describes actions to be taken when he is in danger | • What should you do if you feel you are in danger? |
| Self-efficacy evaluation                        | 1. Evaluate patient’s level of self-efficacy in regards to the prevention and management of COPD exacerbations by using the Action Plan prescribed. [6] | • Believes that he can prevent or manage exacerbations early by using his Action Plan | • Do you believe that you can prevent or manage an exacerbation at home by using an action plan?  
  • In a scale from 1 to 10 (1 – not confident at all, 10 – very confident), tell me the confidence level you have in your ability to:  
    … recognize changes in your sputum?  
    … use your additional treatment of antibiotics?  
    … recognize changes in your shortness of breath?  
    … use your additional treatment of bronchodilators?  
    … use your additional treatment of prednisone?  
  • Do you believe that your Plan of Action will help you to prevent and manage aggravations of your COPD symptoms?  
  • Do you believe that using properly your Action Plan will help you to prevent visits to the emergency room or hospitalizations? |
|                                                |                                                                                   | • Believes that using properly an action plan will help him to prevent or manage COPD exacerbations |                                                                                       |
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<td>Summary of the session</td>
<td>1. Ask the patient to summarize key elements of his Action Plan. [8]</td>
<td>• Can list the key elements of the Action Plan</td>
<td>• Can you summarize in your own words the key elements of your action plan?</td>
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<td></td>
<td>2. Provide to the patient constructive feedback and reinforcement on the use of the Action Plan. [7]</td>
<td>• Expresses agreement for feedback and reinforcement</td>
<td></td>
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<tr>
<td>Learning contract</td>
<td>1. Give to the patient pertinent written information to read. [10]</td>
<td>• Accepts to read written information</td>
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<td></td>
<td>2. Ask the patient to observe on a daily basis if he has changes in his COPD symptoms. [5]</td>
<td>• Monitors on a daily basis if he has changes in his COPD symptoms</td>
<td><strong>At the next session or phone follow-up</strong></td>
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<tr>
<td></td>
<td>3. Ask the patient to use his Action plan to prevent or manage COPD exacerbations. [5]</td>
<td>• Takes the appropriate actions included on his action plan to prevent or manage worsening of his COPD symptoms</td>
<td><strong>At the next session or phone follow-up</strong></td>
</tr>
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<td>Reference to other health professionals</td>
<td>1. Communicate with the treating physician to get the prescription of the Action Plan and to help the patient follow the directives included in it. [9]</td>
<td>• Gets a written action plan with or without a self-administered prescription</td>
<td><strong>At the next session</strong></td>
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<td><strong>Did you get a self-administered prescription?</strong></td>
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<td><strong>Is your prescription on file at the pharmacy? Or, do you keep the medication in reserve at home?</strong></td>
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**Educational Methods and other actions:** ¹ Learning needs assessment, ² Interactive lecturing, ³ Building of ambivalence (motivational interview technique), ⁴ Demonstration and practice, ⁵ Learning contract, ⁶ On a scale of 1 to 10, ask the patient to determine his level of confidence, 1 = not confident at all and 10 = very confident, ⁷ Constructive feedback and reinforcement, ⁸ Summarizing information, ⁹ Reference to other health care professionals, ¹⁰ Give pertinent written information, ¹¹ Case scenarios.

**Suggested Questions:** Questions to evaluate patient’s needs, comprehension of information, and outcomes. If you find negative results readdress issues in order to reach the specific objectives.
Dyspnea Scale
You are breathless, but how much?

0. No dyspnea.

1. Breathless with strenuous exercise.

2. Short of breath when hurrying on the level or walking up a slight hill.

3. Walks slower than people of the same age on the level or stops for breath while walking at own pace on the level.

4. Stops for breath after walking 300 feet (100 meters).

5. Too breathless to leave the house or breathless when dressing.

Visual Ref.: Société de Pneumologie de Langue Française
Text Ref.: Medical Research Council dyspnea scale. Canadian Thoracic Society COPD Guidelines
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