



Workforce Competencies for Patient-Centered Health Care Delivery through Health IT: A Framework for Practice Transformation

* This project supported in whole or in part by ARRA HIT Grant # 90CC0079/02-04 awarded to the Cuyahoga Community College by the Federal HHS Office of the National Coordinator.

Patient-centered Medical Home (PCMH)

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Definitions & Principles														
1	Describe PCMH concepts and goals	1a	Describe the history and background of PCMH	1a.1	Describe the broad historical significance of PCMH	x	x	x	x	x	x	x	x	
				1a.2	Recognize key milestones in the introduction of PCMH, from concept to policy	x	x	x	x	x	x	x	x	
		1b	Define major PCMH concepts	1b.1	Describe the core features and joint principles of PCMH	x	x	x	x	x	x	x	x	
				1b.2	Distinguish the standards for meeting specific PCMH elements	x	x	x	x	x	x	x	x	
		1c	Explain the goals of PCMH	1c.1	Define Triple Aim and how it relates to PCMH	x	x	x	x	x	x	x	x	x
				1c.2	Explain patient-centered health care	x	x	x	x	x	x	x	x	x
				1c.3	Identify the importance of sustainability	x	x	x	x	x	x	x		
		1d	Describe the benefits of implementing PCMH	1d.1	Recognize the overall benefits of implementing PCMH	x	x	x	x	x	x	x	x	x
				1d.2	Contrast the care provided by a personal clinician to the care received by a patient who does not have a medical home	x	x	x	x	x	x	x		
		1e	Discuss your role and the patient's role in PCMH	1e.1	List the key patient actions and responsibilities to be an active patient in PCMH	x	x	x	x	x	x	x		



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				1e.2	Recognize the patient's perspective on PCMH	x	x	x	x	x	x	x		
				1e.3	Explore how your role engages with PCMH models	x	x	x	x	x	x	x	x	x
		1f	Recognize best practices for establishing a true PCMH	1f.1	Consider a true PCMH health care setting and describe its characteristics	x	x	x	x	x	x	x	x	
2	Familiarity with information systems that support PCMH	2a	Recognize the importance of information systems in promoting PCMH	2a.1	Describe the role of information systems in enhanced communication, shared decision making, and quality improvement	x	x	x	x	x	x	x	x	
		2b	Identify the information systems that support PCMH	2b.1	List the types of information systems needed to support PCMH	x	x	x	x	x	x	x	x	
		2c	Define Meaningful Use (MU) and its connection to PCMH	2c.1	Compare and contrast PCMH and MU criteria		x	x	x	x				x
				2c.2	Explain that meaningful use of EHR and effective HIT is the information management infrastructure for powering the workflows in a PCMH and more broadly, systems of care		x	x	x	x				
3	Familiarity with information systems for patient care	3a	Describe the importance of information systems in patient care	3a.1	Define enhanced access and how it is supported through quality information systems		x	x	x	x				
				3a.2	Describe the role of information systems in supporting key PCMH standards such as continuity of care, promoting self-care, and tracking and coordinating care	x	x	x	x	x	x	x		



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				3a.3	Use an evidence-based approach for chronic disease management and preventive health care		X	X	X	X			
		3b	Identify the information systems for patient care	3b.1	List the types of information systems needed for patient care	X	X	X	X	X	X	X	
				3b.2	Identify the specific information systems in your practice and how they support patient care	X	X	X	X	X	X	X	X
		3c	Identify and describe the importance of information systems for patient care outside of practice	3c.1	Describe the use of information systems for sending orders, referrals, and prescriptions and the importance of tracking for follow-up or completion of requested services	X	X	X	X	X	X	X	X
4	Shared decision making	4a	Recognize shared decision making as a key component to PCMH	4a.1	Discuss the importance of shared decision making between care team members and patients and their care team		X	X	X	X			
				4a.2	Identify your role in shared decision making with patients		X	X	X	X			
				4a.3	List ways to implement shared decision making at the point of care and beyond		X	X	X	X			
		4b	Know how to implement shared decision making	4b.1	Identify the key actions necessary to implement shared decision making		X	X	X	X			
5	Working in teams	5a	Discuss the central role of teamwork in PCMH	5a.1	Define what it is to be a team and how to provide team-based care	X	X	X	X	X	X	X	X



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				5a.2	State the reasons why teamwork is important in PCMHs	X	X	X	X	X	X	X	X		
				5a.3	Distinguish between group work and team work	X	X	X	X	X	X	X	X	X	
		5b	Describe the various roles and functions of team members in PCMH	5b.1	Recognize the expanded team roles within a PCMH practice	X	X	X	X	X	X	X	X	X	
				5b.2	Define physician-directed team-oriented practice			X			X				
				5b.3	Link each role to the patient experience and outcomes	X	X	X	X	X	X	X	X	X	X
				5b.4	Identify the function of your specific role as a team member in PCMH	X	X	X	X	X	X	X	X	X	X
		5c	Develop high-functioning interdisciplinary teams	5c.1	List the characteristics of high-functioning interdisciplinary teams	X	X	X	X	X	X	X	X	X	X
				5c.2	Implement skills and activities for developing high-functioning interdisciplinary teams	X	X	X	X	X	X	X	X	X	X
				5c.3	Analyze and discuss effective team behaviors	X	X	X	X	X	X	X	X	X	X
				5c.4	From employee prototypes and other information, build the ideal PCMH team	X	X	X	X	X	X	X	X	X	X
				5c.5	Identify obstacles to teamwork and list ways to overcome them	X	X	X	X	X	X	X	X	X	X
		5d	Promote cross-boundary cooperation and partnership among all provider	5d.1	Identify success factors for cross boundary cooperation	X	X	X	X	X	X	X	X	X	



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			types	5d.2	Discuss skills to build cross boundary cooperation and partnerships	X	X	X	X	X	X	X	X		
6	Effective Communication	6a	Describe the role of effective communication in PCMH	6a.1	Explain the importance of effective communication in PCMH	X	X	X	X	X	X	X	X		
		6b	Identify ways to communicate with patients and team members	6b.1	List effective modes of communication	X	X	X	X	X	X	X	X	X	
				6b.2	Describe a communication model for a systematic, relationship-centered approach to communicating with patients	X	X	X	X	X	X	X	X	X	X
				6b.3	List guidelines for email communication with patients	X	X	X	X	X	X	X	X	X	X
				6b.4	Describe key touchpoints in patient communication such as first and ongoing contact	X	X	X	X	X	X	X	X	X	
		6c	Demonstrate effective listening, observation and communication techniques	6c.1	Demonstrate effective listening, observation and communication techniques in a role play situation	X	X	X	X	X	X	X	X	X	
		6d	Overcome barriers to effective communication	6d.1	Recognize ways to overcome communication barriers	X	X	X	X	X	X	X	X	X	
7	Development of sustained, effective partnerships with patients	7a	Explain the strategy for developing effective patient partnerships	7a.1	Discuss the importance and benefits of engaging patients, pre-, during and post-visit	X	X	X	X	X	X	X			
		7b	Develop effective patient partnerships as a key component of PCMH	7b.1	Describe the role of each team member in developing effective patient partnerships	X	X	X	X	X	X	X			



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				7b.2	Recognize the role of patient representatives serving at the practice level	X	X	X	X	X	X	X		
				7b.3	List key actions for developing effective patient partnerships	X	X	X	X	X	X	X	X	
				7b.4	Serve as the patients' advocate for their health care needs and resources within the practice and the health care system	X	X	X	X	X	X	X	X	
		7c	Facilitate continuity of care to meet patients' needs in a timely and agreeable manner	7c.1	Describe approaches to improving the continuity of outpatient care as patients transition between the medical home and other points of care, e.g., specialists, hospitals, etc.	X	X	X	X	X	X	X	X	
				7c.2	Identify methods to increase the continuity of patients' care within the medical home	X	X	X	X	X	X	X	X	
				7c.3	Discuss approaches to improving continuity as patients transition across other sites of care	X	X	X	X	X	X	X	X	
		7d	Discuss effective examples of patient partnerships	7d.1	Examine and explain a case where a patient having a personal clinician improved their care by avoiding an ER visit, a re-admission or unnecessary admission, unneeded tests, or unnecessary procedures	X	X	X	X	X				
				7d.2	List ways you can develop effective patient partnerships specific to your role	X	X	X	X	X	X	X	X	



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		7e	Manage resistance or conflict within the patient partnership	7e.1	Identify ways to overcome resistance or obstacles to effective patient partnerships	X	X	X	X	X	X	X			
				7e.2	Work with other team members to identify specific practices used to manage patient resistance or conflict effectively	X	X	X	X	X	X	X	X		
8	Care coordination	8a	Define care coordination as a key strategy for PCMH	8a.1	List the potential improvements resulting from effective care coordination			X	X						
		8b	Recognize the importance of integrated, coordinated care in successful health care outcomes	8b.1	Discuss the importance of integrated care across multiple co-morbid chronic illnesses, acute complaints, mental health, prevention and family care			X	X						
		8c	Implement coordinated care	8c.1	Recognize strategies to coordinate complex care needs				X	X					
				8c.2	Provide examples of successful approaches to care coordination				X	X					
				8c.3	Follow-up on referrals, labs, x-rays, and other patient services (role specific)				X		X		X		
				8c.4	Manage mental and behavioral issues for patients in collaboration with mental/behavioral health care providers in the practice and/or community (role specific)				X	X					



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		8d	Use health information systems to coordinate patient care	8d.1	Recognize the key points in patient care to use information systems for care coordination		X	X	X	X			
9	Use of an evidence-based approach, including decision support tools at point of care	9a	Discuss the role of evidence-based care in PCMH	9a.1	Define the central role of evidence-based care to PCMH		X	X	X	X			
				9a.2	Recognize how evidence-based medicine and decision-support tools guide decision making		X	X	X	X			
		9b	Improve patient outcomes by utilization of information systems in patient care	9b.1	Identify resources for decision-supports and evidence based guidelines			X		X			
Quality Standards													
10	Demonstrate the ability to participate as a team member in quality improvement	10a	Discuss the roles and responsibilities in maintaining quality improvement	10a.1	Identify your role and responsibilities, and those of others on your team, to maintain quality improvement	X	X	X	X	X	X	X	X
				10a.2	Identify and discuss how to relate to team behaviors that strengthen or weaken patient safety and quality of care	X	X	X	X	X	X	X	X
		10b	Work as a team to maintain quality improvement	10b.1	List responsibilities necessary to function as a team in quality improvement	X	X	X	X	X	X	X	X
				10b.2	List your specific tasks that contribute to quality improvement in your practice	X	X	X	X	X	X	X	X



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				10b.3	Using an example, illustrate the role and responsibilities of a quality improvement team	X	X	X	X	X	X	X	X
		10c	Engage in a formal process of quality improvement focusing on both service and clinical outcome measures	10c.1	Recognize a formal quality improvement process	X	X	X	X	X	X	X	X
		10c.2		Discuss best practices of successful teamwork in quality improvement	X	X	X	X	X	X	X	X	X
		10c.3		Identify a patient safety issue in the practice and design a program to address this issue	X	X	X	X	X	X	X	X	
11	Identify opportunities for improvement	11a	Identify workflow and data collection issues from a clinical perspective, including quality measurement and improvement	11a.1	Given a scenario, identify workflow and data collection improvements for the practice		X	X	X	X		X	
				11a.2	Create a plan for addressing workflow and data collection improvements based on the given scenario		X	X	X	X		X	
		11b	Identify processes and information flows that accommodate quality improvement and reporting	11b.1	Given a scenario, identify processes and information flows that accommodate quality improvement and reporting		X	X	X	X		X	
12	Ability to utilize patient and practice data to improve patient care	12a	Discuss key strategies for improving patient care	12a.1	Participate in practice improvement meetings and work with other students to discuss key QI strategies	X	X	X	X	X	X	X	X
				12a.2	Analyze patient quality and safety data concerning a common condition seen in the practice			X	X		X		



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		12b	Improve patient outcomes by using quality health care data in patient care	12b.1	Describe the role of electronic medical records, decision supports, and data collection in quality improvement measures	X	X	X	X	X	X	X	X	
				12b.2	List best practices for ensuring quality health care data	X	X	X	X	X	X	X	X	X
		12c	Describe the connection between meaningful use and PCMH	12c.1	Describe the coordination of efforts to systematically input accurate patient data into the EMR and export meaningful reports from this data		X	X	X	X	X	X	X	X
		12d	Collect and use data for population management	12d.1	Discuss best practices for collecting and using data to manage patient populations		X	X	X	X	X	X	X	X
13	Clinical decision making	13a	Describe the importance of clinical decision making in quality standards for PCMH	13a.1	Define clinical decision making		X	X	X	X			X	
				13a.2	Recognize how clinical decision-support tools guide decision-making		X	X	X	X				X
				13a.3	Following a question template, apply clinical decision-making skills to a case study		X	X	X	X				
		13b	Recognize the role of EHR in clinical decision making	13b.1	Describe the use of an electronic health record (EHR) as an evidence-based decision-making tool		X	X	X	X	X			
				13b.2	Discuss which decision-making tools will be used in your practice		X	X	X	X				
14	Use of evidence-based medicine	14a	Provide evidence for improved outcomes	14a.1	Seek research that provides evidence for improved outcomes			X			X			



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				14a.2	Describe the use of electronic health records in research to develop evidence-based guidelines			X			X		
		14b	Use evidence-based guidelines for preventive, acute and chronic care management, including medication management	14b.1	Describe evidence-based guidelines in various situations including preventive, acute and chronic care management		X	X	X	X			
		14c	Translate evidence-based guidelines into executable actions	14c.1	Use examples to translate several evidence-based guidelines into executable actions			X	X		X		
Security and Privacy													
15	HIPAA	15a	Recognize the importance and responsibility of following all HIPAA guidelines and regulations	15a.1	Discuss the goals and purpose of HIPPA guidelines and regulations in your practice	X	X	X	X	X	X	X	X
				15a.2	Review HIPPA guidelines and regulations, and apply them to PCMH	X	X	X	X	X	X	X	X
		15b	Maintain HIPAA compliance related to member records, member interaction and system access	15b.1	Identify actions that maintain HIPPA compliance in a variety of real-world scenarios related to member records, member interaction and system access	X	X	X	X	X	X	X	X
16	HITECH	16a	Describe the purpose of HITECH	16a.1	Define HITECH and its role in data privacy	X	X	X	X	X	X	X	X
		16b	Identify strategies ensuring HITECH supports PCMH	16b.1	Read a brief and discuss the ways in which HITECH ensures EHRs are implemented in a way that supports primary care transformation				X			X	X



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17	Data privacy/exchange	17a	Identify effective security practices within your practice	17a.1	Identify actions that adhere to good security practices in a variety of real-world scenarios	X	X	X	X	X	X	X	X	
				17a.2	Discuss your practice's guidelines for controlling access to protected health information	X	X	X	X	X	X	X	X	X
		17b	Discuss actions to take when data privacy/exchange has been compromised	17b.1	Identify actions to take when data privacy/exchange has been compromised in a variety of real-world scenarios	X	X	X	X	X	X	X	X	X
18	Computer/EHR skills	18a	Describe the importance of computer/EHR skills in data privacy	18a.1	Discuss the role of effective computer/EHR skills in data privacy/exchange	X	X	X	X	X	X	X	X	
				18b	Follow EHR security and privacy practices through effective computer/EHR skills	18b.1	Self-assess your computer/EHR skills and identify areas for improvement	X	X	X	X	X	X	X
		18b.2	Develop a plan for improving your computer/EHR skills			X	X	X	X	X	X	X		
Team-based Care														
19	Problem-solving	19a	Conduct real-time problem-solving for successful outcomes	19a.1	Review scenarios and discuss key problem-solving skills	X	X	X	X	X	X	X	X	
				19a.2	Identify problem-solving skills in various team members	X	X	X	X	X	X	X	X	X
				19a.3	Discuss ways to implement problem-solving skills in your work	X	X	X	X	X	X	X	X	X
20	Leadership skills	20a	Define leadership	20a.1	Distinguish facilitative from authoritarian leadership			X		X	X			



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				20a.2	Identify behavioral attributes of effective medical leaders	X	X	X	X	X	X	X	X	
				20a.3	Identify your responsibilities as a leader in team-based care	X	X	X	X	X	X	X	X	X
		20b	Interact respectfully with all members of the health care team	20b.1	Demonstrate the following communication skills: active listening, reflection, clarification, summation and empathy	X	X	X	X	X	X	X	X	
		20c	Use leadership styles appropriate to various situations	20c.1	Discuss the appropriate situations for the use of various leadership styles (e.g., democratic, directive, or situational - telling, selling, participating, delegating)	X	X	X	X	X	X	X	X	X
				20c.2	Discuss effective leadership styles you have observed in various team meetings and in team members	X	X	X	X	X	X	X	X	X
		20d	Build effective and sustainable teams through leadership skills	20d.1	Identify key elements for building effective and sustainable teams			X			X			
		20e	Lead effective team meetings	20e.1	Identify steps for leading effective team meetings including clinical operations and practice improvement meetings			X			X			
		21	Accountability	21a	Be accountable as a PCMH team member	21a.1	Identify your responsibilities as a PCMH team member and ways to hold yourself accountable	X	X	X	X	X	X	X



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Comp. #	PCMH Competency	DC#	PCMH Detailed Competency	LO#	PCMH Learning Objectives	PSR, Schedulers, Front Desk, Med Secretaries	Nurses (LPNs/RNs), MAs	Providers (MDs, DOs, NPs, PAs)	Care Coordinators	PharmDs, Pharmacy	Health Care Mgmt (Practice Mgrs, Admin)	Health Info Mgmt Medical Records RHIA	IT Professionals	
		21b	Promote mutual accountability among the team and between the team and patients	21b.1	Review and discuss how to promote accountability in various situations	X	X	X	X	X	X	X	X	
22	Differentiate teamwork from group work	22a	Differentiate teamwork from group work	22a.1	Define teamwork and group work	X	X	X	X	X	X	X	X	
				22a.2	Distinguish characteristics and goals of teamwork from group work	X	X	X	X	X	X	X	X	X
				22a.3	Provide examples of teamwork and group work	X	X	X	X	X	X	X	X	X
23	Effective communication with team and external entities	23a	Describe effective communication with team members and external entities	23a.1	Identify principles of effective communication with members of the office staff to plan and execute improvements in work processes	X	X	X	X	X	X	X	X	
Change Management														
24	Demonstrate the ability to actively engage in and provide leadership for change and improvement	24a	Implement a change management model	24a.1	Review a change management model and principles, and discuss how they can be implemented			X			X			
				24a.2	Discuss case studies illustrating leadership for change and improvement			X			X			
				24a.3	List best practices in leadership for change and improvement			X			X			
25	Change management knowledge	25a	Describe the process of change management	25a.1	Identify the key steps in change management			X			X			
				25a.2	Discuss change concepts: laying the foundation, building relationships, changing care delivery and reducing barriers			X			X			



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				25a.3	List the key actions within each of the change concepts			X			X		
		25b	Use change management knowledge to prepare the practice for transformation to PCMH	25b.1	Apply a change management model to a real transformation situation and discuss the process			X			X		
26	Outcomes driven	26a	Discuss the effect of the PCMH model on patient and practice outcomes	26a.1	List the key outcomes from transitioning to the PCMH model	X	X	X	X	X	X	X	X
		26b	Design the change initiative to achieve expected PCMH outcomes	26b.1	List your actions in the transition process that will help achieve the expected PCMH outcomes	X	X	X	X	X	X	X	X
27	Project management	27a	Apply project management and change management principles to create implementation project plans to achieve the project goals	27a.1	Given a scenario, create an implementation plan by applying project management and change management concepts			X	X		X		
		27b	Describe the roles and responsibilities in implementing the change	27b.1	Match the key change management responsibilities to each team member role			X	X		X		
28	Leadership skills	28a	Describe the leadership role in PCMH transformation	28a.1	List leadership responsibilities in transforming a practice to PCMH			X			X		
				28a.2	Discuss ways you can take on and/or support the leadership role in transforming to PCMH			X			X		



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		28b	Recognize the importance of leadership, collaboration and effective communication skills in managing change	28b.1	Given a scenario describing obstacles in a change management initiative, identify best practices for leadership, collaboration and effective communication to improve the situation			X			X		
		28c	Identify leadership skills necessary for transforming to PCMH	28c.1	Given a scenario, discuss ways to align system capabilities with organizational needs in PCMH transformation			X			X		
29	Systems thinking	29a	Define systems thinking	29a.1	Define systems thinking in the context of change management and PCMH			X			X		
		29b	Apply systems thinking to the PCMH change process	29b.1	Given a scenario, identify ways to take a systems approach to managing the PCMH transformation			X			X		
				29b.2	Discuss specific ways you can take a systems approach to the PCMH transformation in your role			X			X		
30	Adaptability and flexibility	30a	Describe the importance of adaptability and flexibility in PCMH transformation	30a.1	Explain the importance of adaptability and flexibility in PCMH transformation			X			X		
		30b	Describe best practices for adaptability and flexibility	30b.1	List ways effective PCMHs adapt to diverse people, populations and systems	X	X	X	X	X	X	X	X
				30b.2	Identify situations that require adaptability and flexibility when transforming to PCMH	X	X	X	X	X	X	X	X



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				30b.3	Describe specific ways you can adapt and be flexible during the transformation	X	X	X	X	X	X	X	X
Patient Self-management													
31	Ability to effectively assist patients with developing action plans for health behavior change	31a	Define patient self-management and distinguish it from patient education	31a.1	Describe the difference between self-management and patient education		X	X	X	X			
				31a.2	Describe a strategy to help patients gain self-efficacy and change their lifestyle behaviors		X	X	X	X			
		31b	Follow the steps for developing patient action plans	31b.1	Recognize the steps for developing patient action plans		X	X	X	X			
				31b.2	Explain to patients how to access their personal care plans	X	X	X	X	X			
				31b.3	Describe the process for aligning the personal care plan and action plan	X	X	X	X	X			
		31c	Assist patients in developing an action plan for disease prevention and health maintenance	31c.1	Given a case study, create an action plan for disease prevention and health maintenance		X	X	X	X			
		31d	Assist patients and their families in selfcare management with information, tools and resources	31d.1	Identify specific information, tools and resources to assist patients and their families in selfcare for a variety of situations	X	X	X	X	X			



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		31e	Discuss ways to help overcome resistance to patient self-management	31e.1	Given a case study, identify ways to help the patient overcome resistance to self-management	X	X	X	X	X			
32	CLAS (Culturally & Linguistically Appropriate Services)	32a	Care for patients and families with sensitivity to each patient's culture	32a.1	Design practice, administrative, and organizational accommodations that contribute to a culturally competent/responsive practice setting	X	X	X	X	X	X	X	
				32a.2	Identify specific behaviors in a practice that contribute to cultural competence	X	X	X	X	X	X	X	
				32a.3	Recognize your responsibilities that contribute to cultural competence in your practice	X	X	X	X	X	X	X	
33	Assessment ability	33a	Assesses patient/family self-management abilities	33a.1	Discuss ways to assess patient/family self-management abilities		X	X	X	X			
				33a.2	Given a case study, follow a model for assessing the patient's abilities to self-manage		X	X	X	X			
34	Interpersonal skills	34a	Use effective interpersonal skills when working with patients in self-management	34a.1	Given a scenario, identify situations that require effective interpersonal skills	X	X	X	X	X	X	X	X
				34a.2	Self-assess your interpersonal skills when helping patients in self-management	X	X	X	X	X	X	X	X
				34a.3	Identify your areas of strength and opportunities for improving your interpersonal skills	X	X	X	X	X	X	X	X



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35	Effective communication skills	35a	Manage communications with community agencies and health departments	35a.1	Given a case study, identify best practices for communicating with community agencies and health departments	X	X	X	X	X	X	X	X
36	Health literacy	36a	Assess the patient's health literacy to ensure complete understanding	36a.1	Follow a brief method for assessing patient health literacy	X	X	X	X	X		X	
				36a.2	Discuss ways to work with patients to improve areas of health literacy and ensure they can read and understand educational material provided	X	X	X	X	X			
37	Evidence-based guidelines	37a	Discuss the role of evidence-based guidelines in patient self-management	37a.1	Identify ways to use evidence-based guidelines in patient self-management		X	X	X	X			
38	Community resource awareness	38a	Recognize the available community resources	38a.1	Connect with community resources to extend resources for care	X	X	X	X	X	X		
				38a.2	Identify resources to assist patients with self-management	X	X	X	X	X	X		
		38b	Assist patients in connecting with peer support groups or other appropriate community resources	38b.1	Identify best practices for connecting patients with peer support groups or other appropriate community resources	X	X	X	X	X	X	X	