

# Self-management plans



# Learning objectives

- Describe the rationale behind creating self-management plans.
- Discuss what to include in a self-management plan.



# What is self-management?

- A “management style” where patients use the **best treatments** provided by health care professionals and **approach their illness in a proactive manner**, leading to a healthier life.<sup>1</sup>
- Self-management **teaches skills that continue to work above and beyond** the short-term relief that may be gained from self-help strategies.



# The rationale for self-management

- Many traditional “self-help” strategies focus on **acute** symptoms of depression and anxiety.
- 1 in 3 people with depression experience it on a **chronic, long-term basis**, in which symptoms wax and wane<sup>1</sup>.
- Most individuals need **long-term strategies** that help them **monitor and manage** their depression and anxiety over time.



# Components of self-management of depression (1 of 2)<sup>1</sup>

Component	Tasks
<b>Information</b>	<ul style="list-style-type: none"><li>• Educating self and family members or friends about depression</li></ul>
<b>Medication management</b>	<ul style="list-style-type: none"><li>• Taking medications as recommended by one's health care provider</li><li>• Overcoming barriers to medication adherence</li></ul>
<b>Symptom management</b>	<ul style="list-style-type: none"><li>• Self-monitoring of symptoms</li><li>• Managing concurrent symptoms of anxiety and/or substance use</li><li>• Using techniques to deal with frustration, fatigue, and isolation</li><li>• Relaxation</li><li>• Using strategies for preventing relapse of depression</li></ul>
<b>Lifestyle</b>	<ul style="list-style-type: none"><li>• Exercise</li><li>• Vacations</li><li>• Leisure activities</li><li>• Healthy nutrition and diet</li></ul>

# Components of self-management of depression (2 of 2)<sup>1</sup>

Component	Tasks
<b>Social support</b>	<ul style="list-style-type: none"><li>• Family support</li><li>• Relationships with peers and friends</li></ul>
<b>Communication</b>	<ul style="list-style-type: none"><li>• Assertiveness</li><li>• Communication strategies (e.g., with mental health professionals)</li></ul>
<b>Others</b>	<ul style="list-style-type: none"><li>• Accessing support services</li><li>• Creating action plans</li><li>• Decision making</li><li>• Goal setting</li><li>• Problem solving</li><li>• Career planning</li><li>• Spirituality</li></ul>

# What is a self-management plan?

A structured, documented plan that is developed to support an individual's self-management of their condition

Developed **collaboratively** between the care team and the patient

Goals have **observable, measurable outcomes**

Clinical outcomes are **routinely measured** by evidence-based tools

**Treatments are actively changed** until treatment goals are achieved

# Foundation for self-management planning

## Goal setting

Provide **psychoeducation**, as appropriate

**Assess patient's knowledge** about symptoms, diagnosis, and treatment

Elicit patient's ideas and **reasons for change**

Identify patient's **primary concern and focus**



# Primary concern and reasons for change

## Identify patient's primary concern and focus

- *You've discussed some difficulties in your marriage and a desire to cut back on your drinking. You also mentioned difficulty managing your depression lately. Which of these problems are bothering you the most? What would you like to focus on first?*

## Elicit patient's ideas and reasons for change

- *What kinds of things have you already been thinking about trying?*
- *What would be some benefits if you made this change?*

# Assess knowledge and provide psychoeducation

## Assess patient's knowledge about their symptoms, diagnosis, and treatment

- *Can you tell me about your understanding of depression and its impact on people?*
- *What is your understanding of options for the treatment for depression and anxiety?*

## Provide psychoeducation, as appropriate

- *You're familiar with medication as a possible treatment for depression. Would it be okay if I shared some more information about treating depression?*

# Moving into goal-setting

## Summarize what you've discussed and transition into goal-setting

- *We've discussed several things today, including your history with depression, what you're currently struggling with, and some ideas you have about where you'd like to go from here. Given everything we've discussed, what do you think you might like to try?*

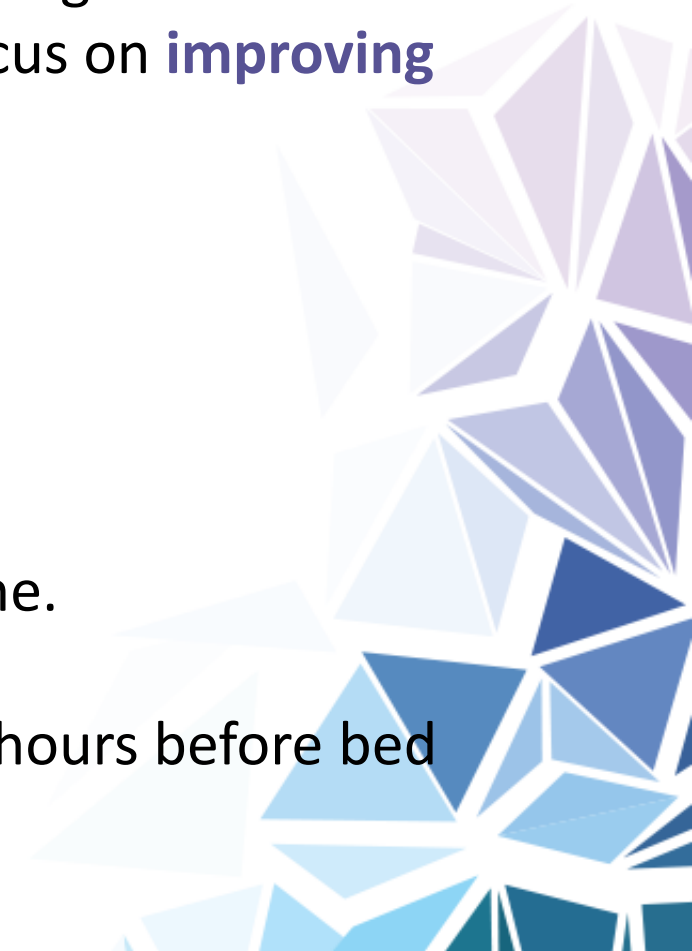
# SMART goal setting

<b>Specific</b>	Does the goal outline exactly what the patient is going to do?
<b>Measurable</b>	How will we know when they have accomplished the goal?
<b>Attainable</b>	Is the goal realistic and doable in the immediate future?
<b>Relevant</b>	Does this goal align with the problem they are trying to work on?
<b>Time-bound</b>	What is the timeline for completion of this goal?

# Writing better goals: Mallory

Mallory is dealing with **depression, anxiety and trouble sleeping**. She is also having a lot of **stress at work**. She is **most concerned with her insomnia** right now as it is affecting her functioning day to day. She would initially like to focus on **improving her sleep**.

1. I will exercise more frequently.
2. I will get a new job by the end of the month.
3. I will use deep breathing and relaxation techniques at bedtime.
4. Every night this week, I will take a bath, stop using screens 2 hours before bed and read for 1 hour before going to sleep.



# Writing better goals: Alex

Alex has dealt with **depression on and off for 10 years**. He has been in a bout of depression for about 3 weeks and wants to **manage the symptoms better**.

1. I will start seeing a new therapist.
2. I will talk to my friend on the phone for 1 hour every day this week.
3. I will develop a morning routine that I will engage in at least 3 days per week.
4. I will do yoga regularly.



# Self-management goal examples

Take my medication daily. If I'm thinking about making a change, call the office

Go for a walk this Saturday with my partner

Call my friend to schedule a lunch date within the next 2 weeks

Practice belly breathing four days this week for five minutes at a time

Decrease wine intake from three glasses to one glass in the evenings

Practice "three good things" gratitude exercise 5-7 days/week for the next two weeks

Turn off the TV in my bedroom at bedtime every night for the next week and read 30 min instead

Visit the library 1x next week to update my resume

Call a therapist within 1 week and schedule an initial appointment

Knit for at least 5 minutes each day for the next two weeks

Schedule 15 minutes of "me time" each day for the next week to be quiet and listen to music

Practice yoga for 30 minutes, 3 days/week, for the next two weeks

Stop caffeine intake after 4PM each day for the next two weeks

# Anticipating and managing barriers

<b>Barrier</b>	<b>Management strategy</b>
<b>Time</b>	<ul style="list-style-type: none"><li>• Chunking activities into small time commitments</li><li>• Using a scheduling tool or timer</li></ul>
<b>Distraction</b>	<ul style="list-style-type: none"><li>• Omit or manage the distraction</li></ul>
<b>Motivation</b>	<ul style="list-style-type: none"><li>• Reduce activation energy required</li><li>• Make “not doing” it harder than doing it</li><li>• Build in rewards for completing the activity</li></ul>





# Tips for effective self-management planning

- Stay curious and patient-centered
  - Ask **open-ended questions**
  - Seek **permission** before giving advice or education
  - Avoid “prescribing” what you think is best
- Meet the patient where they are
  - Make goals **simple and attainable**
  - Be **flexible** – goals can change!
  - Instill hope that they can get better



# Self-management plan example

Self-Management Action Plan			
Today's Date: _____ Patient Name: _____			
<b>GOAL:</b> What is something I want to work on?			
Provide a goal description. What are you going to do?			
_____			
_____			
_____			
HOW?	WHEN?	WHERE?	FREQUENCY?

<p>How ready am I to work on this goal?</p> <p>1 2 3 4 5 6 7 8 9 10</p> 	<p>How confident am I to work on this goal?</p> <p>1 2 3 4 5 6 7 8 9 10</p> 
<p><b>Challenges:</b> What barriers are in the way and how will I overcome them?</p> <p>1.)</p> <p>2.)</p> <p>3.)</p>	
<p><b>What supports do I need?</b></p> <p>1.)</p> <p>2.)</p> <p>3.)</p>	
<p><b>Follow-up and next steps:</b></p> <p>1.)</p> <p>2.)</p> <p>3.)</p>	
<p><b>PRISM</b></p>	

# Resources

- [Self-management plan template](#)
- [Self-management plan letter](#)



# References

1. Duggal HS. Self-Management of Depression: Beyond the Medical Model. Perm J. 2019;23:18-295. doi:10.7812/TPP/18-295

