

PHASE

Preventing Heart Attacks & Strokes Everyday



Welcome to the PHASE Learning Community!
Please mute your phone to minimize background noise



PHASE



PREVENTING HEART ATTACKS
& STROKES EVERY DAY

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Center for Care Innovations

**PHASE: All Health Centers Office Hours
September 2017**



Webinar Housekeeping

1. Lines are NOT muted
 - **Please use your phone's mute feature when not speaking**
2. To listen to the audio for this webinar, please call 303.248.0285, access code: 5617817.
3. Remember to chat in questions!
4. Webinar is being recorded and will be posted on PHASEsupport.org and a link will be sent via email



Agenda

Introduction & Burning Issues (Alexis & Jerry: 10 min)

Finding & Fixing Uncontrolled HTN (Jerry, Danielle, You: 45 min)

- Seeded Discussion on Tools for Team/Patient/Population Management Work
- Open Discussion, Q&A, Problem Solving

Wrap Up (Alexis: 5 min)

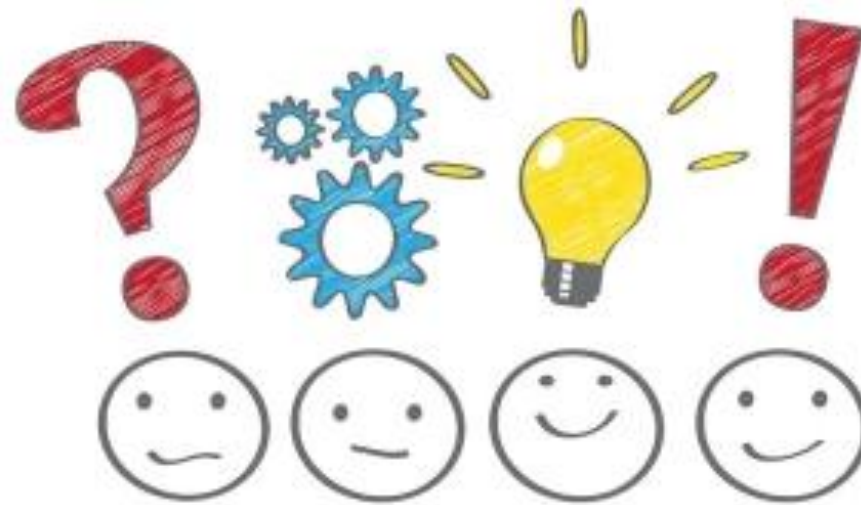
- Resources & Upcoming Convening

Desired Outcomes

- Reinforce key steps to move the Hypertension needle
- Learn successful practices in these areas from a high performing health center
- Use peer sharing to enhance everyone's blood pressure control efforts
- Answer any burning questions



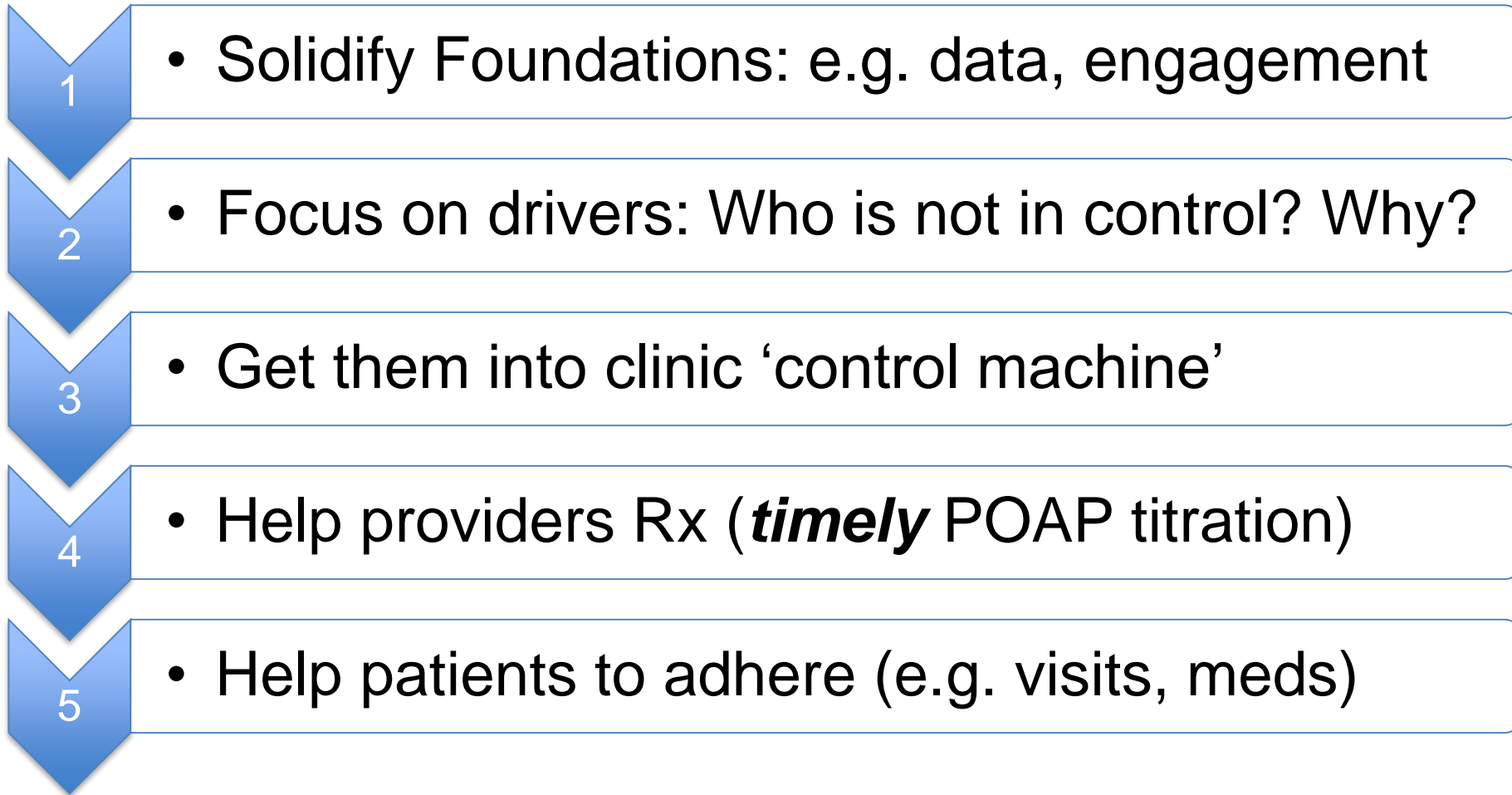
Burning Questions/Issues?



July – September Coaching Calls:

Steps to Move the Needle on Hypertension Control

Some Key Steps to Move HTN Needle





Petaluma Health Center

Currently caring for 29,000 patients via
150,000 annual visits

Sites:

2 large primary care sites

1 homeless shelter

3 school based health centers

- Full spectrum family centered primary medical care for children and adults
- Adult and pediatric dental care
- Women's health including pregnancy care and gynecology consultation
- Integrated behavioral health and psychiatry consultation

Wellness services:

Acupuncture

Chiropractic care

Integrative Medicine consultation

Nutrition

Shared medical visits

Community exercise programs

Specialty Care:

Ophthalmology and Optometry

Podiatry

Endocrinology

Rheumatology (telehealth)



Petaluma
HealthCenter

INCENTIVE - Hypertension Control ?

COMPLIANCE



2167
2867

0 exclusions

TARGET

1 Compliance is 1 percentage points above the organization's target of 75%.

Locations ▾

All

Payer Groups ▾

All

Provider

All

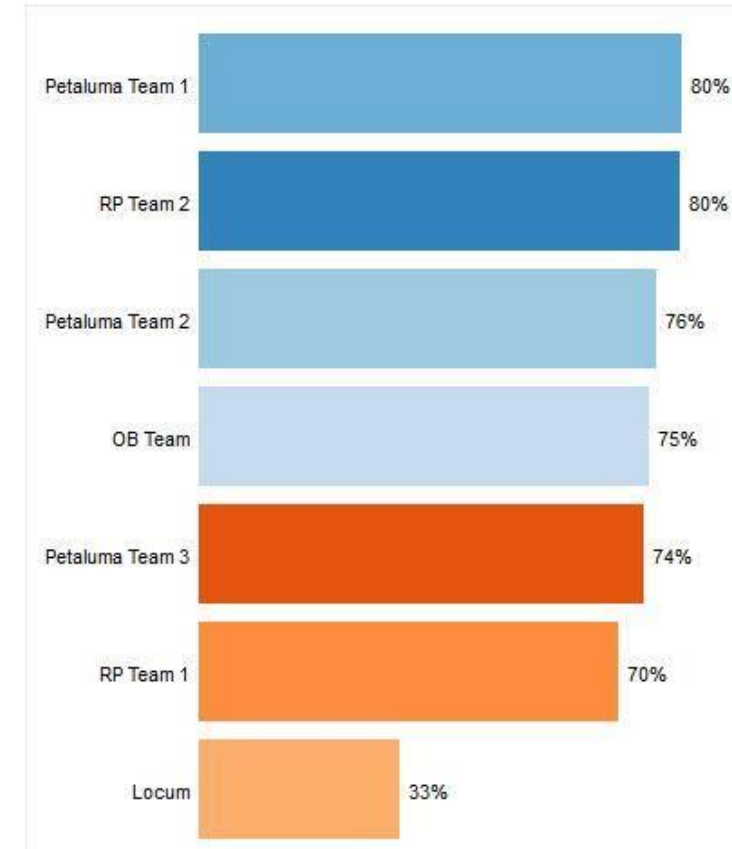
Genders

All

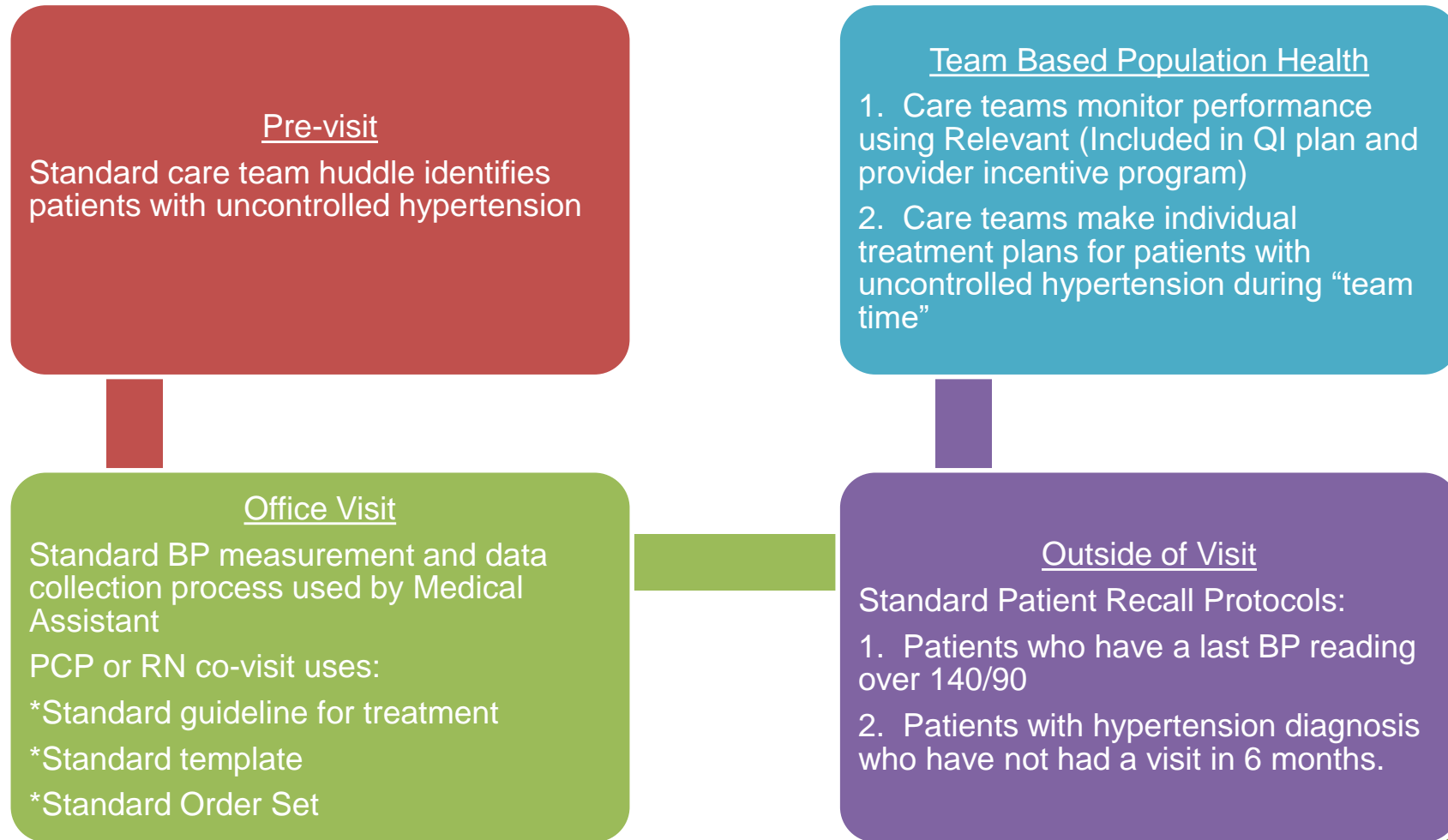
Compliance trend



Compliance by Provider Team



It Took Many Systemic Changes to Improve Hypertension Control



Key Initiatives for Discussion

- Standard template
- Standard order set
- Recall protocols
- “Team-time” for management of uncontrolled hypertension



Hypertension Documentation Template

Subjective:

Chief Complaint(s):

HPI: ▼

Cardiac Risk Assessment

EXERCISE ____.

DIET: ____.

Cardiovascular

HYPERTENSION ____, .

HOME BP MONITORING ____.

MEDICATION ADHERANCE ____.

ASSOCIATED SYMPTOMS ____.

DENIES ____.

Self-Management

LAST SELF MANAGEMENT GOAL: see last note for details.

SELF MANAGEMENT GOAL: Documented in Preventive Medicine.

Hypertension Goal for 18 - 59 and / or CKD or DM: <140/90

Hypertension Goal > 60 without CKD or DM: <150/90.

| <div style="float: left; width: 20px; height: 20px; background: linear-gradient(to top right, transparent 48%, #ccc 48% 52%, #ccc 52%); border: 1px solid black; margin-bottom: 2px;"></div> Search for Order Sets | | | | | | | | | | | | |
|---|------|--|-----------------|-----------------|------------|------------|---|-----------|---------------------------------|-----------|------------|-------------------|
| ORDER SET: Hypertension RCHC Select All Order MEASURE: 363-B QUICK ORDER SET: NO | | | | | | | | | | | | |
| DIAGNOSES (TRIGGER): DIAGNOSES (LINKED): (SAME AS TRIGGER) AGE (TRIGGER): 18Y 0M To 90Y 0M GENDER (TRIGGER): Unknown | | | | | | | MESSAGE REFERRAL REQUIREMENTS: Referral not indicated BEST PRACTICES: STEP 1 - Consider starting a combination ACE-inhibitor and HCTZ as first line treatment. If not tolerant to ACE start diuretic. IF NOT CONTROLLED STEP 2 is add a CCB (Amlodipine), IF NOT CONTROLLED STEP 3 ADD Spironolactone or a BB. ALL MEDICATIONS BELOW Covered by PHP & 4\$ drug programs except Amlodipine and losartan which are both less than 10\$ at pharmacy. PLEASE SEE KAISER INTERNATIONAL HTN GUIDELINES BELOW. | | | | | |
| <div style="display: flex; justify-content: space-between;"> Benign hypertension Others </div> | | | | | | | | | | | | |
| Rx | | | | | | | | | | | | |
| Order Browse | | | | | | | | | | | | |
| ☐ | 🧑‍⚕️ | Name | Strength | Take | Freq | Duration | Refills | Route | Formulation | Dispense | Date | Status |
| <input type="checkbox"/> | | Amlodipine Besylate | 5 MG | 1 tablet | Once a day | 30 day(s) | 11 | Orally | Tablet | 30 Tablet | - | Other Actions ▾ 📄 |
| <input type="checkbox"/> | | Hydrochlorothiazide | 25 MG | 1 tablet | Once a day | 30 day(s) | 11 | Orally | Tablet | 30 Tablet | 09/16/2016 | Other Actions ▾ 📄 |
| <input type="checkbox"/> | | Lisinopril | 10 MG | 1 tab | once a day | 30 days | 11 | Orally | Tablet | 30 Tablet | 02/12/2010 | Other Actions ▾ 📄 |
| <input type="checkbox"/> | | Losartan Potassium | 50 MG | 1 tablet | Once a day | 30 day(s) | 11 | Orally | Tablet | 30 Tablet | - | Other Actions ▾ 📄 |
| <input type="checkbox"/> | | Spironolactone | 25 MG | 1/2 tablet | once a day | 90 days | 3 | Orally | Tablet | 45 Tablet | - | Other Actions ▾ 📄 |
| <input type="checkbox"/> | | Lisinopril-Hydrochlorothiazide | 20-25 MG | 1/2 tablet | Once a day | 90 days | 3 | Orally | Tablet | 45 | - | Other Actions ▾ 📄 |
| <input type="checkbox"/> | | Metoprolol Succinate ER | 25 MG | 1 tablet | Once a day | 30 day(s) | 11 | Orally | Tablet Extended Release 24 Hour | 30 Tablet | - | Other Actions ▾ 📄 |
| <input type="checkbox"/> | | Blood Pressure Cuff | NA | Use as directed | daily | 30 days | 0 | topically | Miscellaneous | 1 Kits | - | Other Actions ▾ 📄 |
| Labs | | | | | | | | | | | | |
| AssignedTo: Martin MA, Sara ... Order Browse | | | | | | | | | | | | |
| ☐ | 🧑‍⚕️ | Description | Lab Company | Frequency | Duration | Date | Status | | | | | |
| <input type="checkbox"/> | | LIPID PROFILE FP *PHC | Quest,Quest_OLD | - | - | 08/28/2010 | Other Actions ▾ 📄 | | | | | |
| <input type="checkbox"/> | | COMPREHENSIVE METABOLIC PANEL *PHC | Quest,Quest_OLD | - | - | 05/12/2017 | Other Actions ▾ 📄 | | | | | |
| <input type="checkbox"/> | | MICROALBUMIN/CREATININE, RANDOM URINE *PHC | Quest,Quest_OLD | - | - | - | Other Actions ▾ 📄 | | | | | |
| Diagnostic Imaging | | | | | | | | | | | | |
| AssignedTo: Martin MA, Sara ... Order Browse | | | | | | | | | | | | |
| ☐ | 🧑‍⚕️ | Description | DI Company | Frequency | Duration | Date | Status | | | | | |
| <input type="checkbox"/> | | EKG WITH INTERPRETATION | - | - | - | - | Other Actions ▾ 📄 | | | | | |

Hypertension Order Set – Part 2

| | | | | | | | | |
|--------------------------|--|---|---|---|------------|---------------|---|--|
| <input type="checkbox"/> | | Nutrition Appointment | - | - | 01/18/2010 | Other Actions | ▼ | |
| <input type="checkbox"/> | | Blood Pressure MANUAL Recheck | - | - | 02/20/2015 | Other Actions | ▼ | |
| <input type="checkbox"/> | | SMV METABOLIC (English) - Thurs 5:30PM [P] | - | - | - | Other Actions | ▼ | |
| <input type="checkbox"/> | | SMV TAKING CONTROL OF YOUR HEALTH - 1st/3rd Tu 1:30PM [P] | - | - | - | Other Actions | ▼ | |

| Immunizations | | | | | Order |
|--------------------------|------|------|------|--------|-------|
| <input type="checkbox"/> | Name | Dose | Date | Status | |
| Therapeutic Injections | | | | | |

| Appointments | | Order |
|--------------------------|------------------|-------|
| <input type="checkbox"/> | Follow-Up In: 3W | |

| Physician Education | |
|----------------------|---|
| PDF | |
| | Kaiser - Hypertension Guidelines - 2013 |
| | RCHC - HTN Guidelines - 2016 |
| WEB REFERENCE | |

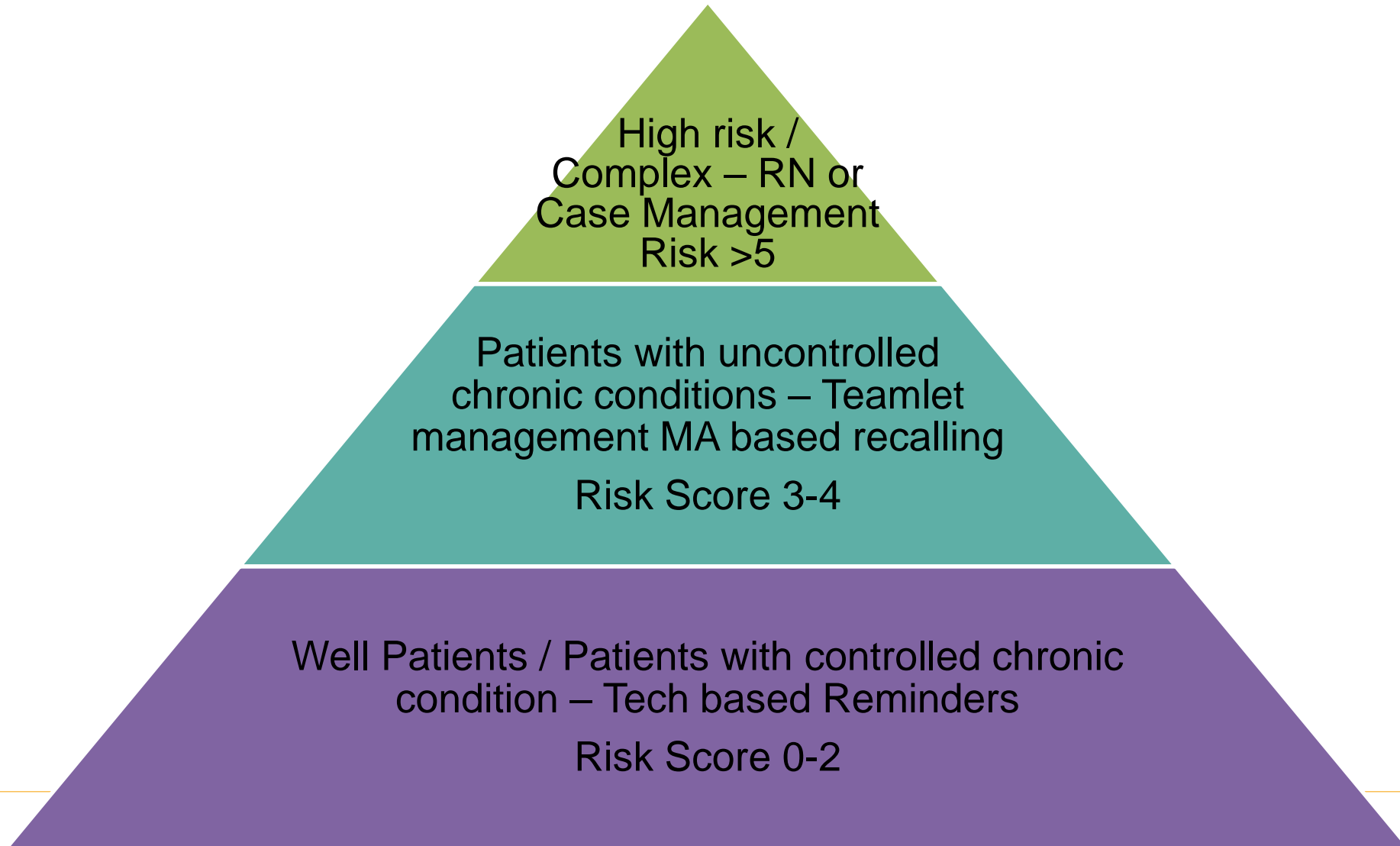
| Smart Forms | |
|-------------|--|
| Name | |

| Referrals | | Order |
|-----------|--|-------|
| | | |

| Patient Education | |
|--------------------------|---|
| PDF | |
| <input type="checkbox"/> | Blood Pressure Chart |
| <input type="checkbox"/> | Home Blood Pressure Log |
| <input type="checkbox"/> | Balanced Plate - English & Spanish |
| <input type="checkbox"/> | AAFP Hypertension - English |
| <input type="checkbox"/> | AAFP Hypertension - Spanish |
| <input type="checkbox"/> | Hypertension Lifestyle Plan - English & Spanish |
| WEB REFERENCE | |

| | |
|-------|-------|
| Notes | Apply |
|-------|-------|

Hypertension Control – Recall Protocols



Recall Protocols – email, portal, text, phone message

1. Patients with last BP uncontrolled
2. Patients with controlled BP but no visit in 6 months

Hypertension Recall

1 Define Senders2 Define Recipients3 Preview Messages4 Confirm

Define recipients of this campaign

Gender

This campaign will be sent out to this gender type(s) and is not configurable

☒ Male ☒ Female

Follow up time

Every 3 Months

Active patients

Check for the encounters within last

1 year(s) and 0 month(s)

Age Group

This campaign should be sent to the patients with the age group:

18 To 85

Batch size

Number of patients to reach out daily:

☐ Notify all patients

Batch Size 200

Blood Pressure Threshold

Systolic 140

Diastolic 90

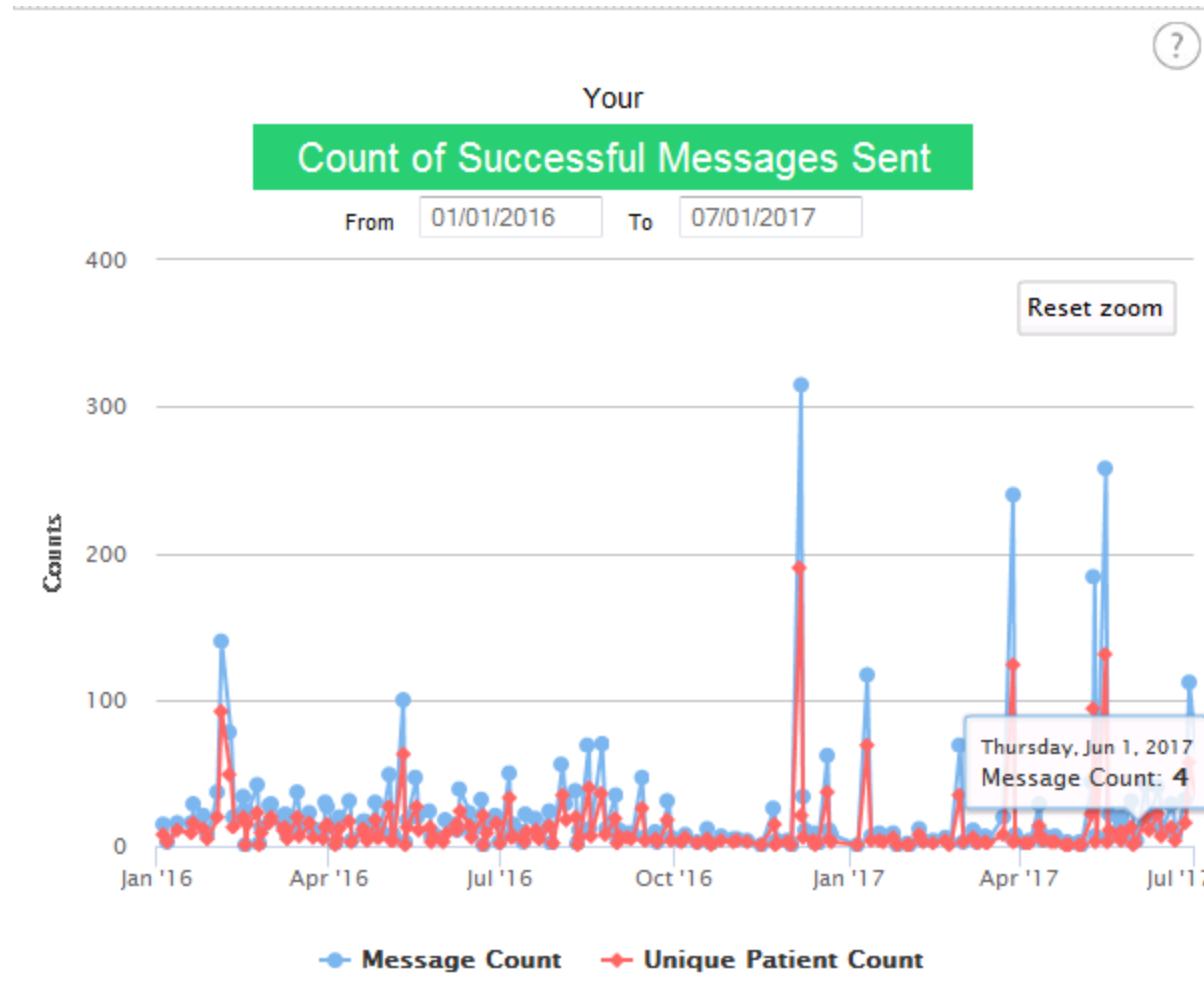
Repeat on

Repeat on selected day(s):

☐ S ☐ M ☒ T ☒ W ☒ T ☐ F ☐ S

BackSave & Next

Uncontrolled BP Recall Messages Sent



Hypertension Control

- Care teams began using one team meeting a month to review uncontrolled hypertension cases and make individual plans for patients.
 - Web-based system is available for teams to track progress and identify patients for intervention.
-

INCENTIVE - Hypertension Control ?

Measurement period: July 1, 2016—June 30, 2017

COMPLIANCE

2167
2867

0 exclusions

TARGET

1

Compliance is 1 percentage points above the organization's target of 75%.

FILTERS

Locations ▾
All

Payer Groups ▾
All

Providers ▾
All

Genders ▾
All

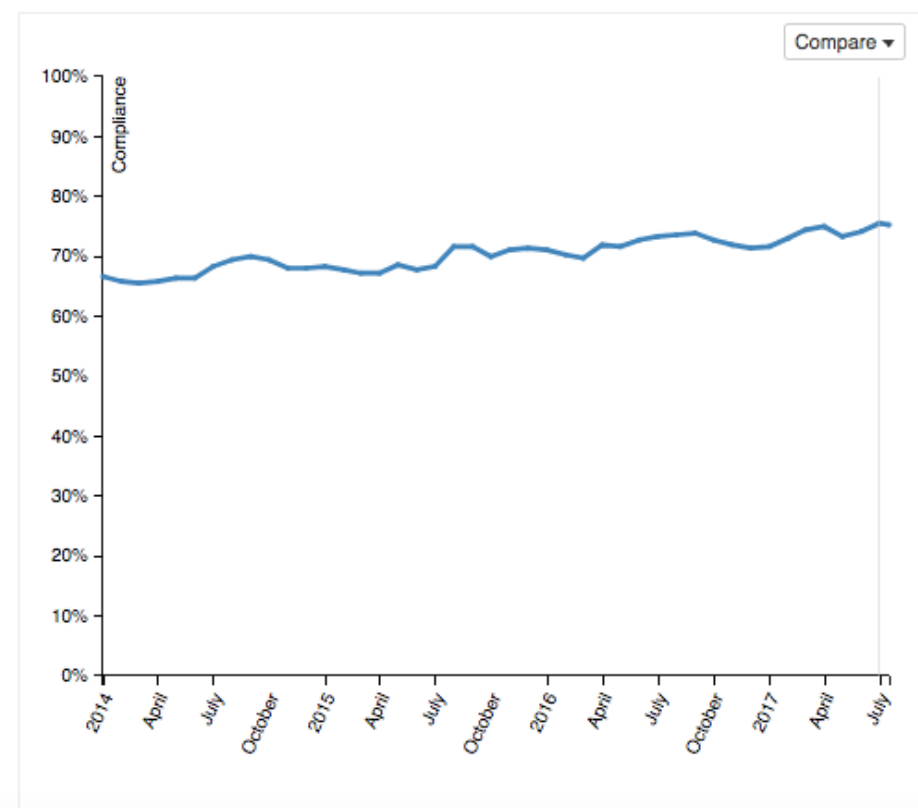
Provider Teams ▾
All

Races ▾
All

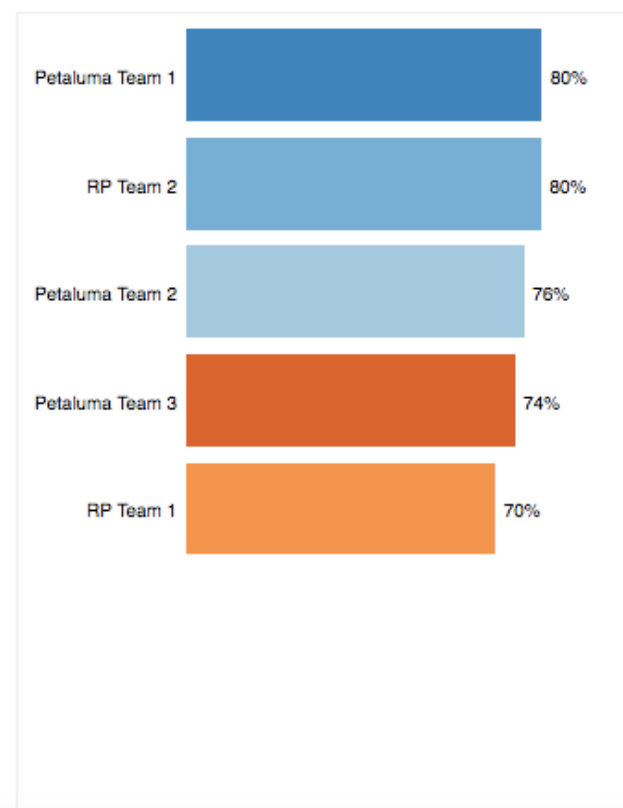
Payers ▾
All

Ethnicities ▾
All

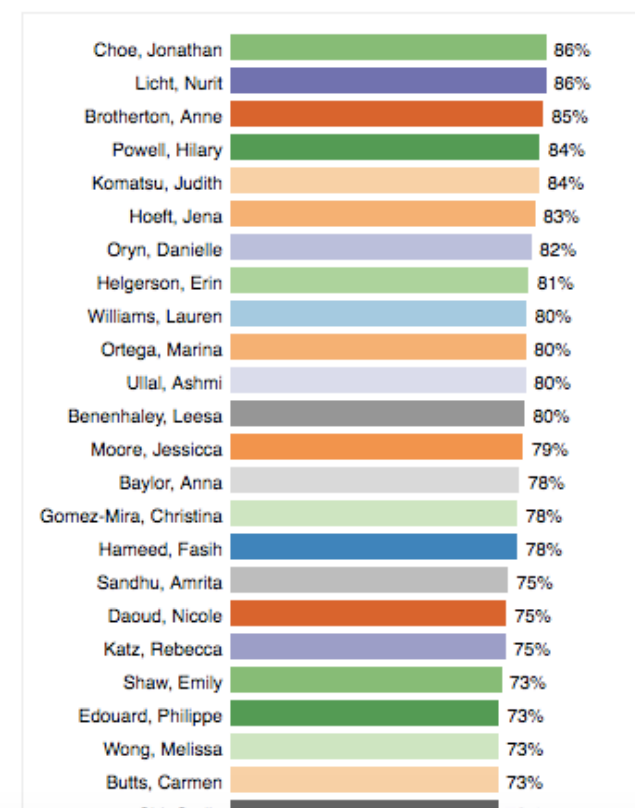
Compliance trend



Compliance by Provider Team



Compliance by Provider



INCENTIVE - Hypertension Control ?

Measurement period: July 1, 2016—June 30, 2017

COMPLIANCE

85%

56

66

0 exclusions

TARGET

10

Compliance is 10 percentage points above the organization's target of 75%.

FILTERS

Locations ▾
All

Payers ▾
All

Providers ▾
Brotherton, Anne

Genders ▾
All

Provider Teams ▾
All

Races ▾
All

Payers ▾
All

Ethnicities ▾
All

Compliance trend

| Time Period | Compliance (%) |
|----------------|----------------|
| 2014 (Start) | 58 |
| 2014 (April) | 40 |
| 2014 (July) | 33 |
| 2014 (October) | 50 |
| 2015 (January) | 62 |
| 2015 (April) | 60 |
| 2015 (July) | 52 |
| 2015 (October) | 65 |
| 2016 (January) | 65 |
| 2016 (April) | 68 |
| 2016 (July) | 64 |
| 2016 (October) | 75 |
| 2017 (January) | 84 |
| 2017 (April) | 80 |
| 2017 (July) | 85 |

Compliance by Provider Team

| Provider Team | Compliance (%) |
|-----------------|----------------|
| Petaluma Team 2 | 85 |

Compliance by Provider

| Provider | Compliance (%) |
|-----------------------|----------------|
| Choe, Jonathan | 86 |
| Licht, Nurit | 86 |
| Brotherton, Anne | 85 |
| Powell, Hilary | 84 |
| Komatsu, Judith | 84 |
| Hoeft, Jena | 83 |
| Oryn, Danielle | 82 |
| Helgersen, Erin | 81 |
| Williams, Lauren | 80 |
| Ortega, Marina | 80 |
| Ullal, Ashmi | 80 |
| Benenhaley, Leesa | 80 |
| Moore, Jessica | 79 |
| Baylor, Anna | 78 |
| Gomez-Mira, Christina | 78 |
| Hameed, Fasih | 78 |
| Sandhu, Amrita | 75 |
| Daoud, Nicole | 75 |
| Katz, Rebecca | 75 |
| Shaw, Emily | 73 |
| Edouard, Philippe | 73 |
| Wong, Melissa | 73 |
| Butts, Carmen | 73 |

Uncontrolled BP List by Provider/Team

Measure Results

[All Patients](#)[Compliant Patients](#)[Non-Compliant Patients](#)[Excluded Patients](#)

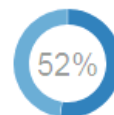
Displaying 10 of 11 results

[Export](#)

| Measure ↓ | Start Date | End Date | Patient Name | MRN | Risk Score | DOB | Provider Name | Location | Msrmt Value | Numerator |
|-----------|------------|------------|------------------------|---------|------------|------------|------------------|------------------------|-------------|-----------|
| HTN_CTRL | 07/17/2016 | 07/16/2017 | James, Leonardo Jr | 1111111 | 2.0 | 1980-01-01 | Brotherton, Anne | Petaluma Health Center | 145/66 | N |
| HTN_CTRL | 07/17/2016 | 07/16/2017 | James, Robert | 1111112 | 0.5 | 1980-01-01 | Brotherton, Anne | Petaluma Health Center | 140/90 | N |
| HTN_CTRL | 07/17/2016 | 07/16/2017 | James, Robert | 1111113 | 1.5 | 1980-01-01 | Brotherton, Anne | Petaluma Health Center | 141/90 | N |
| HTN_CTRL | 07/17/2016 | 07/16/2017 | James, Robert | 1111114 | 3.0 | 1980-01-01 | Brotherton, Anne | Petaluma Health Center | 150/98 | N |
| HTN_CTRL | 07/17/2016 | 07/16/2017 | James, Robert, Marilia | 1111115 | 1.5 | 1980-01-01 | Brotherton, Anne | Petaluma Health Center | 156/96 | N |
| HTN_CTRL | 07/17/2016 | 07/16/2017 | James, Robert | 1111116 | 1.5 | 1980-01-01 | Brotherton, Anne | Petaluma Health Center | 146/77 | N |
| HTN_CTRL | 07/17/2016 | 07/16/2017 | James, Robert | 1111117 | 5.0 | 1980-01-01 | Brotherton, Anne | Petaluma Health Center | 144/72 | N |
| HTN_CTRL | 07/17/2016 | 07/16/2017 | James, Robert | 1111118 | 4.5 | 1980-01-01 | Brotherton, Anne | Petaluma Health Center | 152/82 | N |
| HTN_CTRL | 07/17/2016 | 07/16/2017 | James, Robert | 1111119 | 2.0 | 1980-01-01 | Brotherton, Anne | Petaluma Health Center | 143/92 | N |
| HTN_CTRL | 07/17/2016 | 07/16/2017 | James, Robert | 1111120 | 0.5 | 1980-01-01 | Brotherton, Anne | Petaluma Health Center | 142/60 | N |

NURSING - PHASE Patients on Appropriate Medications

Percentage of PHASE-Eligible Patients on an Aspirin Med, an ACE/ARB AND a Statin



$\frac{668}{1277}$



Measure Results

All Patients

Compliant Patients

Non-Compliant Patients

Excluded Patients

Displaying 10 of 609 results

Export ▾

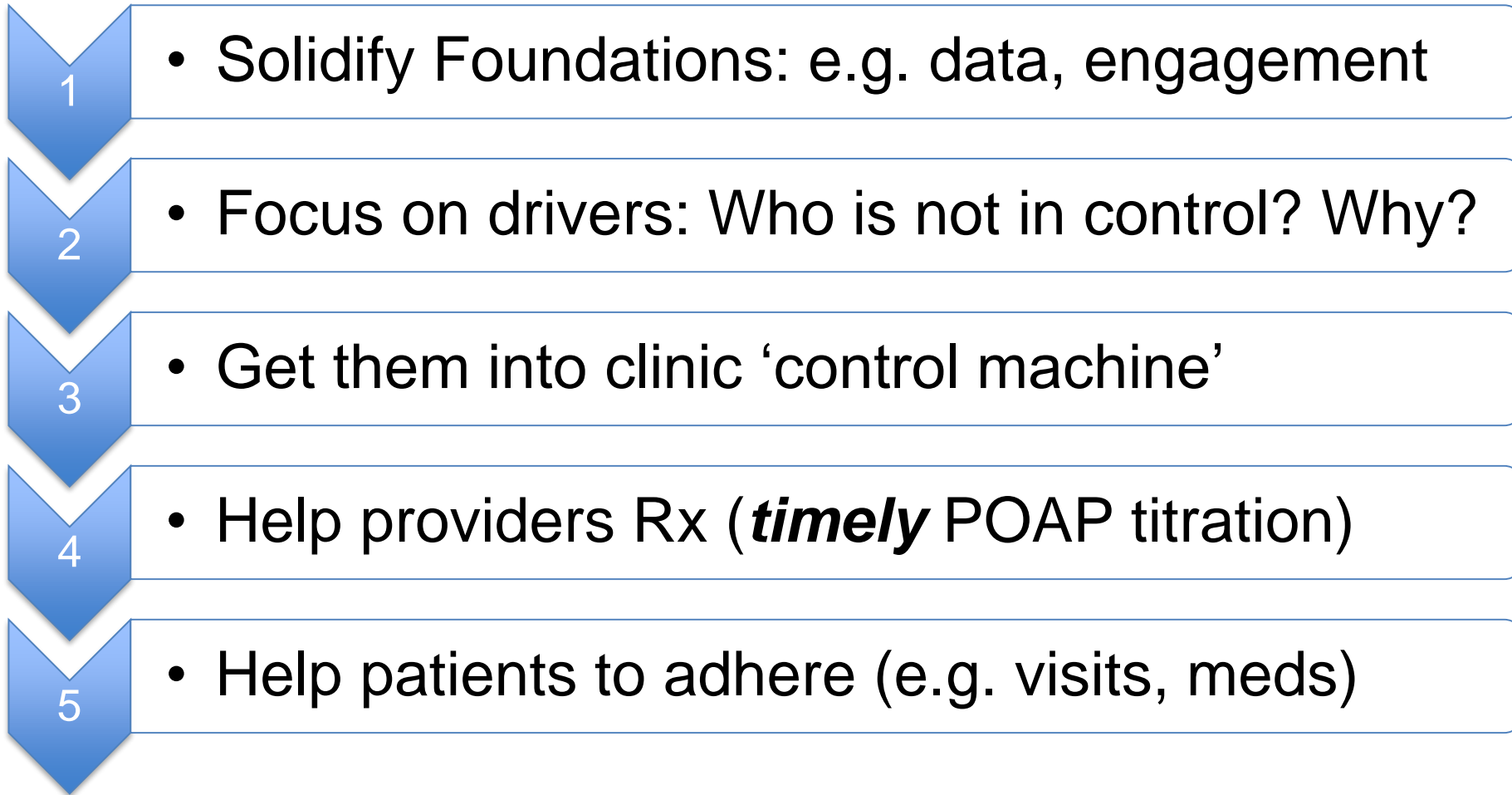
Search

| Measure ↓ | Start Date | End Date | Patient Name | MRN | Risk Score | DOB | Provider Name | Location | Msrmt Value | Numerator |
|--------------|------------|------------|-----------------|---------|------------|------------|-----------------------|----------------------------|--|-----------|
| msr_61 | 07/17/2016 | 07/16/2017 | Wardle, Audrey | 1000000 | 3.5 | 10/10/1950 | Gomez-Mira, Christina | Petaluma Health Center | Aspirin: Aspirin, ACE_ARB: Lisinopril, Statins: None | N |
| msr_61 | 07/17/2016 | 07/16/2017 | Wardle, John | 1000000 | 4.0 | 10/10/1950 | Pendleton, John | Rohnert Park Health Center | Aspirin: Eliquis, ACE_ARB: None, Statins: Simvastatin | N |
| msr_61 | 07/17/2016 | 07/16/2017 | Wardle, John | 1000000 | 2.0 | 10/10/1950 | Sandhu, Amrita | Petaluma Health Center | Aspirin: Aspirin, ACE_ARB: None, Statins: None | N |
| msr_61 | 07/17/2016 | 07/16/2017 | Wardle, Marina | 1000000 | 1.0 | 10/10/1950 | Ortega, Marina | Petaluma Health Center | Aspirin: None, ACE_ARB: None, Statins: None | N |
| msr_61 | 07/17/2016 | 07/16/2017 | Wardle, Annie | 1000000 | 8.5 | 10/10/1950 | Nicol, Annie | Petaluma Health Center | Aspirin: None, ACE_ARB: Lisinopril, Statins: None | N |
| msr_61 | 07/17/2016 | 07/16/2017 | Wardle, Sean | 1000000 | 7.5 | 10/10/1950 | Upton, Sean | Petaluma Health Center | Aspirin: None, ACE_ARB: None, Statins: None | N |
| msr_61 | 07/17/2016 | 07/16/2017 | Wardle, Whitney | 1000000 | 1.5 | 10/10/1950 | Romero, Whitney | Petaluma Health Center | Aspirin: Aspirin, ACE_ARB: None, Statins: Atorvastatin Calcium | N |
| msr_61 | 07/17/2016 | 07/16/2017 | Wardle, Dalbir | 1000000 | 1.5 | 10/10/1950 | Khalsa, Dalbir | Petaluma Health Center | Aspirin: Aspirin Low Dose, ACE_ARB: Lisinopril, Statins: None | N |
| msr_61 | 07/17/2016 | 07/16/2017 | Wardle, Ashmi | 1000000 | 1.5 | 10/10/1950 | Ullal, Ashmi | Rohnert Park Health Center | Aspirin: Aspirin, ACE_ARB: None, Statins: Simvastatin | N |



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Petaluma Health Center
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Moving the Needle on HTN Control



Discussion/Q&A, Other Topics



Resources to Support Your Care Reengineering

- **QI Resources:** PHASESupport.org
> Resources > QI Resources
- **Training Opportunities:**
PHASESupport.org > Training>
Training/TA Opportunities
- **Responsive Assistance:**
PHASESupport.org > Training>
Support Request Form



Monthly newsletter – 2nd Thursday

- Evaluation news
- Upcoming webinars and convenings
- Upcoming training opportunities
- Resource highlights
- Other PHASE news

PHASE Convening

Thursday, November 16 | 8:30am - 4:30pm

Marriot Convention Center Oakland, CA

****Look for the agenda and registration link later this week!****

Lodging

Room block at Courtyard Oakland Downtown
– reserve your room by October 25th!



PHASE Convening Workshops



Hunter Gatewood, MSW, LCSW
Signal Key Consulting

**Using Performance Data
to Light a Fire for Change**



Michael Cox
Kaiser Permanente

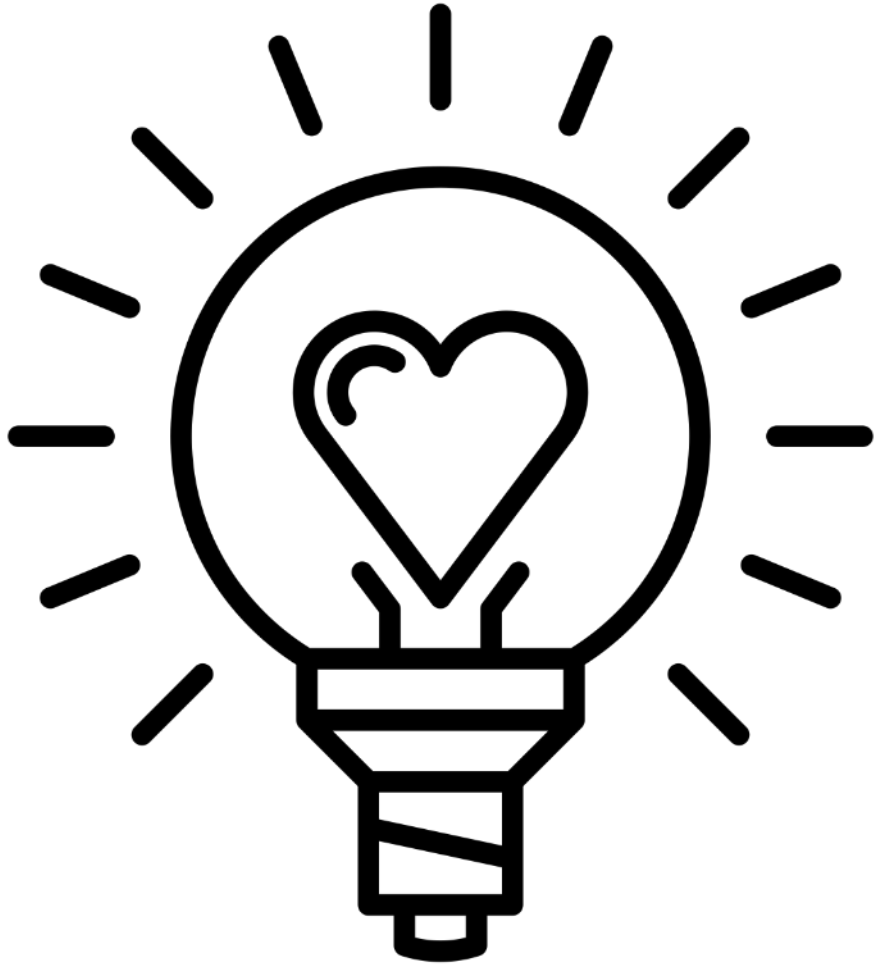
**Motivational Interviewing
for Medication Adherence**



Michael Rakotz, MD, FAHA, FAAFP
American Medical Association

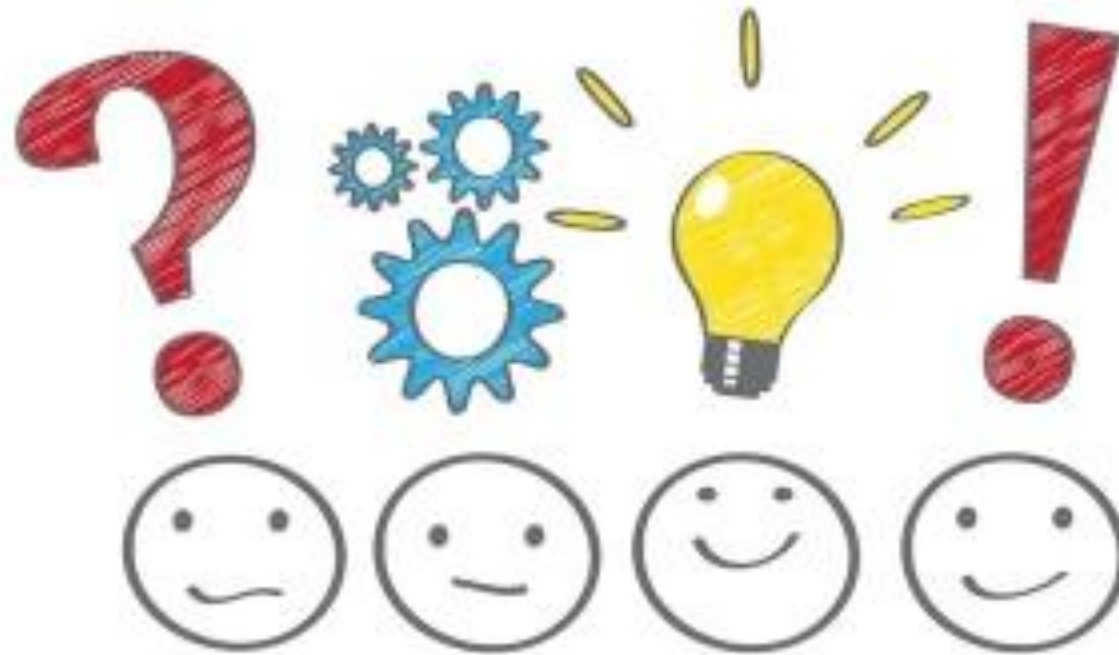
**Engaging Clinical Teams &
Patients in Self-measured
Blood Pressure
Monitoring (SMBP)**

Bright Spots “Trading Cards”



Promising Practices & Impactful Changes

- Your creative intervention/change/re-engineering effort
- Outcomes, results or progress
- Advice for others interested in making this change or idea
- Template for trading card coming soon
- Collect and trade on November 16th



QUESTIONS?

Don't hesitate to reach out as your 2017 PHASE work unfolds!

Jerry Osheroff

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josheroff@tmitconsulting.com

Visit us at PHASESupport.org