LEVERAGING CARE TEAMS AND USING TECHNOLOGY & ALTERNATIVE VISITS TO EXPAND ACCESS AND CARE

Petaluma Health Center
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What Does Your Care Team Look Like?

• Draw a visual representation of your team.
• Who are the members?
• Where are they located in relation to one another?
• Be prepared to share with the group.
Petaluma Health Center

- Federally Qualified Health Center
- Two locations in Southern Sonoma County
  - Petaluma Health Center
  - Rohnert Park Health Center
- Family Practice with 35,000 unique patients
- Approximately 50% of patients have MediCal
- Primary care with on site Dental, OB/GYN, MH services, Nutrition, and Integrative Medicine
- eClinicalWorks
Team Based Care at PHC: Humble Beginnings
Family Practice Teams (6)
Shared Resources Across 6 Family Medicine Teams

- Nutritionist (2 FTE)
- Certified Diabetes Educator (1 FTE)
- Patient Navigator (4.5 FTE)
- RN Case Managers (2.5 FTE)
- Psychiatrist (1 FTE)
- LCSWs/MFTs (4 FTE)
- Psychologist (2 FTE)
Team Leadership Structure

- Team Directors
- BH Director
- Team/MA Manager
- MA Supervisor
- Manager of Nursing & Case Management
- Referrals Manager
- HIC Lead
Flow Coordinator—The Hub

- Morning huddle announcements
- Monitors schedules & directs flow
- Quick start & soft landing
- Documentation help for MAs & providers (vaccines, in-house labs and procedures)

- Controls & Temps
- Communication Hub for Team and Call Center
- Jockey the schedule
- Break MAs
- Help close open loops – procedures, labs
Team Nurse Role

- Advice/Results Calls
- Refills
- Nurse Schedule
- New Patients and Patient Education on Provider Schedules
  - All visits are precepted by a provider
- Wound Care
- INR
- PHASE (diabetes & hypertension)
- Pregnancy Testing
- Blood Pressure f/u
- Testosterone Injection
Team Nurse Visit Types

- Wound Care
- INR
- PHASE (diabetes & hypertension)
- Pregnancy Testing
- Blood Pressure f/u
- Testosterone Injection
- Asthma Education
- Insulin Teaching
### Panel Size

#### 18 & 12 Month Panel Size By Provider
(as of End of Day Yesterday)

<table>
<thead>
<tr>
<th>Team</th>
<th>Provider</th>
<th>Panel Size Cap</th>
<th>Panel Size 18 Month</th>
<th>Panel Size 12 Month</th>
<th>Panel Openings</th>
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Legend:
- Panel Size Cap
- Panel Size 18 Month
- Panel Size 12 Month
- Panel Openings
Risk Model

- Influenced by AAFP and other risk models (like HCC conditions)
- Incorporates risks, chronic conditions, SDOH, medications, ED utilization, and admissions

**Point Values:**
- Risks = ½pt
- Chronic conditions = 1pt
- SDOH and utilization mixed

**Risk Level**
- 0-2 points = Low Risk
- 3-4 points = Medium Risk
- >5 points = High Risk
Population Health

- Automate with tech when possible
- Built into our huddles (Relevant Care Gaps)
- Routine screening and well primary prevention through campaigns.
- Knowing and using communication preferences is key.
Population Health

- Use staff/team time for uncontrolled chronic disease
- Targeted efforts at QIP measures across teams and departments
Shared Medical Visits

- Liver Health
- Diabetes (Eng/Sp)
- Pain Empowerment
- Living in Balance
- Anxiety & Depression
- PLAY
- Freedom from Nicotine
- MAT Group
- Be at Ease
- Fall Prevention
- Seeking Safety
Tele Health Visits: Considerations

- No expensive equipment required
- For many specialties Tele Health outcomes are as good as standard care
- Contracting vs. Using Telehealth Company
- Where is the Pt/Provider?
Tele Health Visit Types

- Psychiatry
- Endocrinology
- Rheumatology
- Neurology
- Gastroenterology
Standardization & Reducing Variability

- Orientation checklists
- Annual skills checklists
- EHR standardization
- Training schedule with refreshers

- External Audits – Joint Commission, PCMH, Medi-cal, Medicare, VFC
- Internal Audits – AMP program
- Quality Assurance monitoring

Shared Responsibility between managers, Compliance & Quality / Informatics Departments
Team Trainings

• Week 1
  • Team Meeting (1.5 hours)
  • Pop Health/Training
• Week 2
  • Provider Case Review (1 hour)
  • MA/Staff Team Meeting (30 min)
• Week 3
  • All Provider Meeting (1.5 hours)
  • All Staff Meeting (1 hour)
• Week 4
  • Provider Support (45 min)
  • MA/Staff Team Support/Training (30 min)
Communication Channels & Tools

• Huddle TV
• Team Meetings
• Vocera
• Jabber
• Slack
• Intranet
• Wiki
Lessons Learned

- Team model & roles need periodic retraining/reorientation
- Teams are always a work in progress
- Success requires a balance of flexibility and standardization
What’s Next?

- Role and Integration of Patient Navigation
- Teams 1 and 4 “Super-Team”
- OB/Women’s Health Team Transition
- Data Entry Transition to Involve Patients
- eConsults
- Patient Portal and App Optimization
- Population Health Champions
Team Activity Part 1

• Look at your team drawing
• Where are the pain points?
• Draw your ideal team
  • New/Different Roles?
  • Physical Proximity?
  • What are they doing?
  • Consider adding dotted lines for communication
Team Activity Part 2

• What are the barriers to realizing your vision for a new team?
• What resources do you need to address these barriers?
• What next steps could you take to realize your vision?