

# Shift and Share Preparation

Use this worksheet to help you prepare for your Shift and Share presentation at the PHLN Convening.

## INSTRUCTIONS

**Step 1:** Decide on a visual method or artifact for how you will share your work. Examples:

- Storyboard (provided)
- Toolkit
- Specific tool to showcase
- Infographic
- Brief 1-2 pager
- Storytelling

**Step 2:** The following worksheet provides guidance to help you identify an exciting part of your work that you want to share AND think your peers would be excited about.

**Step 3:** Let Megan know if you need any materials or support in coming up with your shift and share; we're here to help!

**Step 4:** Print slides and bring to session if you are doing a storyboard; we'll have a board for you.

Other materials provided are: flip chart, markers, sticky notes.

## ORGANIZATION CONTEXT

Provide context on your organization. Add more if necessary.

Organization Model:

Number of Sites:

Types of Services Offered:

Number of Patients:

Payer Mix:

EHR Used:

Care Team Structure:

## SHARE YOUR WORK

Identify 1-2 tangible components of your work in the topic that you are excited about to share with others in the PHLN. This might be an innovation, a successful change, a challenge you worked through, etc.

See page 3 for sample talking points for your respective topic.

## LESSONS LEARNED

*Completing the following phrases:*

Our biggest surprise working on [topic area you are sharing about] is...

If we could go back and do one thing different, it would be...

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## NEXT STEPS

*Completing the following phrases:*

In an ideal world **one year** from now, our [topic you are sharing about] would ....

In an ideal world, **three- five years** from now, our [topic you are sharing about] would ....

## DISCUSSION QUESTIONS

*Brainstorm 1-2 questions or challenges that you want to discuss to promote cross sharing with peers and experts in today's shift and share.*

Here are a couple of challenges I would love your feedback on:

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# Focus Areas & Sample Questions

## SOCIAL DETERMINANTS OF HEALTH

*Cover one or two of these areas:*

- How did you gain buy-in to address SDOH in your organization?
- How do you assess for social needs?
- What services are provided to address patients' social needs and how are they provided (i.e., partnerships with CBOs)?
- What data is collected on SDOH and how do you share this information (i.e., via EHR)?

## ALTERNATIVE VISITS

*Deep dive into 1-2 alternative visits that show promise. Discuss:*

- What are the alternative visits, who does them, how are they billed?
- How are you sustaining them (any new payment mechanisms, like partnering with Managed Care Plan, etc.)?
- What data (and tools you've used) have you collected to measure effectiveness (from patient, cost, provider, care team perspectives)?

## COMPLEX CARE MANAGEMENT

*Cover one or two of these areas:*

- How do you identify (i.e., stratification) which populations get care management services?
- What does your care management model look like (i.e., staff roles, workflows)?
- What reports do you provide to care teams to help manage care – preventive and chronic care services – for patients in complex care management?
- How are you sustaining your services?

## USING DATA FOR POPULATION HEALTH MANAGEMENT

*Cover one or two of these areas:*

- What does your data infrastructure look like (staff roles, EHR interface, data tools, data validation process)?
- What reports does your care team use and how often?
- How do you define your population (considering patients not seen, assigned patients, etc.)?
- How do you manage patient panels?
- Do you perform risk adjustment of these panels?