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Spotlight on Huddles & Managing Capacity and Demand, Cont.

Expanding Access through Team Care

Monthly Technical Assistance Webinar #8

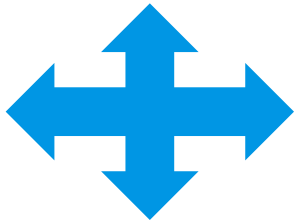
April 16, 2015

Agenda



- 1. Session Overview-** Hunter Gatewood
- 2. Spotlight on Huddles-** Mendocino Community Health Clinic
- 3. Managing Capacity and Demand, Cont. -** Coleman Associates
- 4. Upcoming Events & Reminders-** Susannah Brouwer

Program Goals (The Forest)



Expand access
to primary care services

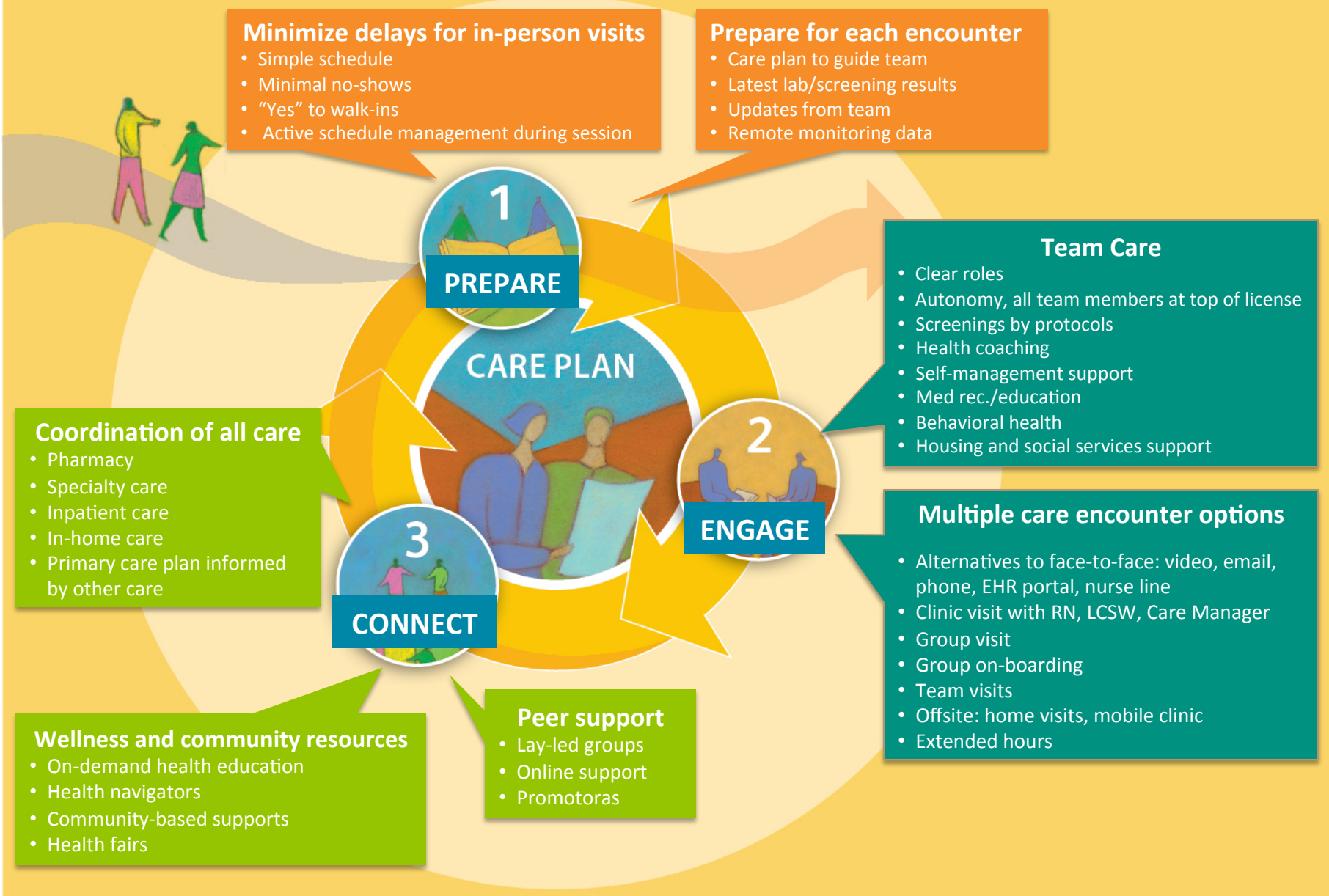


Foster innovation
in the safety net

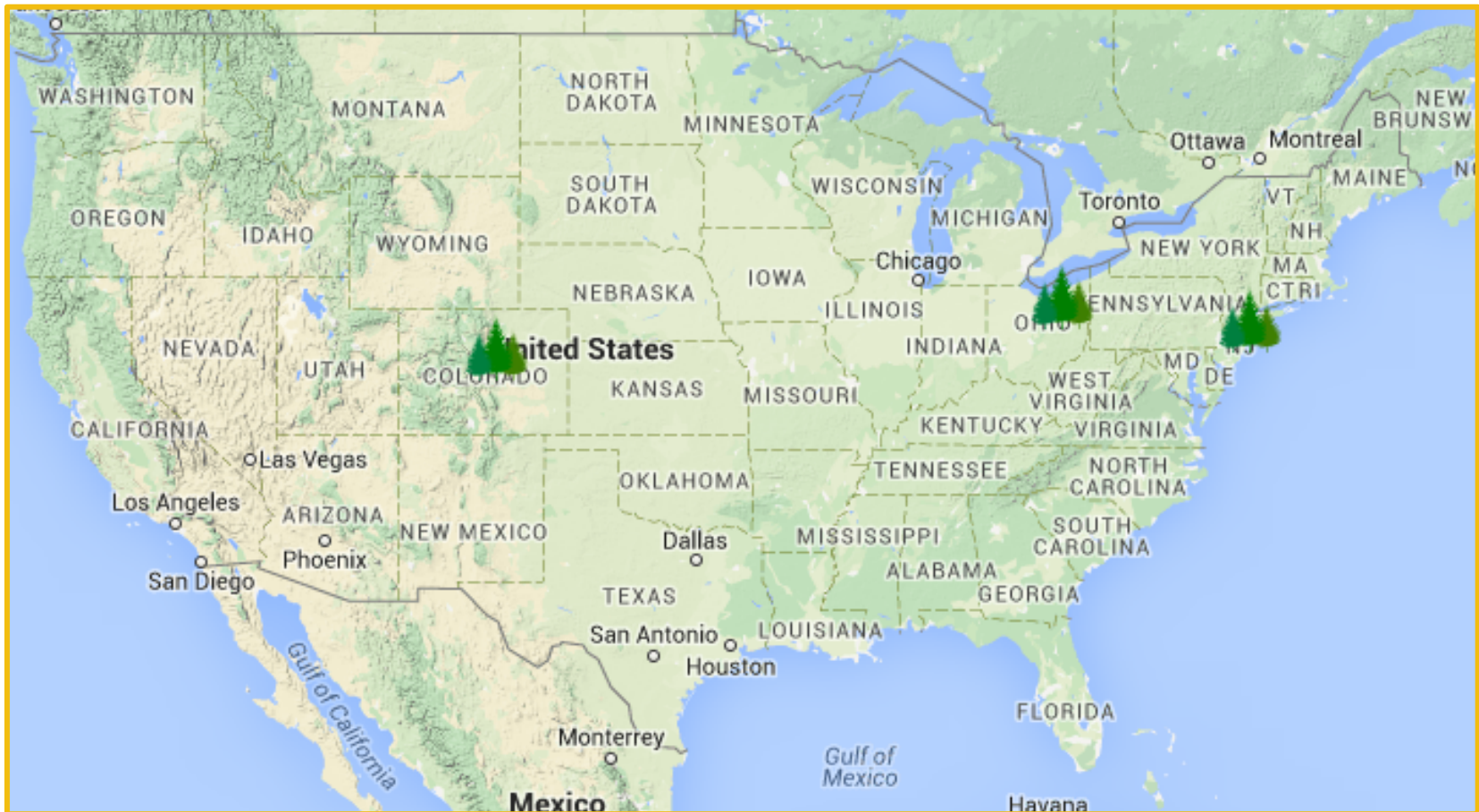


**Improve the efficiency
and effectiveness**
of team care models

Collaborative Accessible Continuous Care (The Trees)



Exemplar clinic site visits are a chance to see the **trees** (specific interventions you're working on) come together as a **forest** (better access, effective teams, innovation).



Your clinic

=

learning system
to manage complex changes
to improve care

Mendocino Community Health Clinic



Spotlight on Huddles

Mendocino Community Health Clinic



i2iTracks Morning Huddle (Due Indicators)

NextApptTime	Med Rec #	Name	Age	BP (Last Value)	BP (Last Date)	Pap (i2i) (Last Value)	Mammogram (Last Value)	Depression Screening (i2i) (Last Date)	PHQ 9-Total Score (Last Value)	PHQ 9-Total Score (Last Date)
1:00 PM	[REDACTED]	[REDACTED]	56 Yrs	124/82	3/17/2015	Refused	Received	2/24/2015	24	2/24/2015
		Procedure / Referral: EKG (i2i)								
		Procedure / Referral: Breast Cancer Screening								
		Procedure / Referral: Annual Health Screen								
1:15 PM	[REDACTED]	[REDACTED]	3 Yrs	92/58	3/4/2015					
		Immunization: Flu (i2i)								
		Procedure / Referral: Annual Health Screen								
1:45 PM	[REDACTED]	[REDACTED]	38 Yrs	134/86	5/30/2014					
		Immunization: Flu (i2i)								
		Immunization: Tetanus (i2i)								
		Immunization: Tdap								
		Procedure / Referral: EKG (i2i)								
		Procedure / Referral: Depression Screening (i2i)								
		Lab: Potassium								
2:00 PM	[REDACTED]	[REDACTED]	62 Yrs	136/80	3/11/2015			1/15/2015	5	1/15/2015
		Education: Exercise (i2i)								
		Immunization: Tetanus (i2i)								
		Immunization: Tdap								
		Procedure / Referral: EKG (i2i)								
		Procedure / Referral: Annual Health Screen								
2:15 PM	[REDACTED]	[REDACTED]	50 Yrs	143/82	3/9/2015					
		Education: Exercise (i2i)								
		Immunization: Flu (i2i)								
		Immunization: Tetanus (i2i)								
		Immunization: Tdap								
		Procedure / Referral: Depression Screening (i2i)								
		Procedure / Referral: Foot Screening (i2i)								

Mendocino Community Health Clinic



CCI
CENTER FOR CARE
INNOVATIONS

Mendocino Community Health Clinic, Inc. Appointments Listing From 4/10/2015 to 4/10/2015						
4/09/15 2:22 PM Beg Tm	Dur	Md Rc	Pat Age	Pat Name	Birth Dt	Details
FRIDAY						
Hillside Health Center						
Hupp PA, Paul						
AHS 9:00 A		15	305120	41 yrs.		stomach problems or 2/2/15 seen ^{change pain thoracic back pain} remission opiod dependence, refer to Suboxone program
AHS 9:15 A		HTN	15	303161	59 yrs. T2DM	follow up on diabetes hyperlipidemia, labs mchart from 11/07/14
SHA 9:30 A			30	361686	10 yrs.	HIB, PNEUMO, last seen 10/2 Lamy for health advice 7.7 11/1/14 CHDD
AHS ADY (Colony) 10:00 A		HTN	15	322047	40 yrs.	check on DM seen 3/18/15 abdominal pain Acute respiratory inf.
AHS 10:15 A			15	317814	62 yrs.	A1C 12.6 on 3/9/15 labs ordered not mchart. seen 6/29/15 abdominal pain
10:30 A			30	381258	1 yr	pt has pain all over body, head, legs needs attention
SHA 11:00 A		HTN	15	326429	52 yrs.	18 month CHDP. MCHAT, seen 3/02/14 for surgery t/u DTAR CURRANT 12 Poss HIVES seen 3/00/15, ordered labs (not inquest) Having pain in his left rotator cuff. seen 1/23/15 Lft rotator cuff tear DR. Schmidt May need a Cortizone injection.
SHA 11:30 A			15	312510	9 yrs.	poss referral to eye dr mom has concerns about pt blinking too often UP to date on 122
AHS 1:00 P			30	334340	27 yrs.	Est care needs thyroid meds refilled. Special member for 3 months as of today OK per Myra at
1:00 P		HTN	15	310246	61 yrs.	Results f/u abdominal pain, labs mchart, printed labs 4/8/15
1:30 P			15	321616	52 yrs.	check up (same day only)
1:45 P			15	305346	34 yrs.	stomach problems seen 4/01/15 back, acute neck pain
2:00 P			30	319223	11 yrs.	Tdap, MCV, HPV CHDD

Mendocino Community Health Clinic



Time	Provider	Resource	Type	Patient	Age	Sex	Language	Race	PCP	Acuity
8:00 AM	Dr. Jonathan Smith	Health Educator	Recheck	100 Miguel Smithson	56	M	English	White	Dr. Jonathan Jones Smith	2.38
D	Reason: BP Check History (12 Mo.): No Shows: 3 Cancelled: 2 Visits: 6 ER: 1 Admits: 2 Last Visit DR: Dr. Markus Domingo Outstanding Referrals: 2									
	Last BMI: 35.2 Weight Change (6 Mo.): +6 lbs Last BP: 180/130 Last PHQ: 4									
	Last Colon Cancer Screening: 6/1/2014 Colonoscopy Smoker: No Framingham Risk Factor: 70% Last 3 A1c: 10.2, 9.5, 8.3									
	Last 3 BP: 180/130, 170/140, 175/135 Last 2 LDL: 90, 100									
	Due: Foot Exam, Diet Education, Flu Shot									
8:15 AM	Dr. Phil Franklin	Dietician	Follow-Up	101 Maria Smithson	51	F	English	White	Dr. Mable S. Simpson	1.9
D H	Reason: Abnormal Weight Gain History (12 Mo.): No Shows: 6 Cancelled: 2 Visits: 4 ER: 0 Admits: 1 Last Visit DR: Dr. Phil Franklin Outstanding Referrals: 1									
	Last BMI: 32.3 Weight Change (6 Mo.): +25 lbs. Last BP: 135/80 Last PHQ: 2									
	Last Pap: 4/1/2014 LMP: 7/15/2014 Last Mammo: 2/1/2010 Last Colon Cancer Screening: 6/15/2013 Flexible Sigmoidoscopy Smoker: Yes									
	Framingham Risk Factor: 55% Last 3 A1c: 8, 7.5, 8.3 Last 3 BP: 135/80, 130/78, 125/70 Last 2 LDL: 85, 75									
	Due: Mammogram, Flu Shot, Eye Exam									
8:30 AM	Dr. Bobby Jones	Registered Nurse	Checkup	102 Larry Lassen	15	M	English	White	Dr. Juan Gomez	1.9
A B	Reason: Asthma History (12 Mo.): No Shows: 3 Cancelled: 1 Visits: 2 ER: 0 Admits: 0 Last Visit DR: Dr. Juan Gomez Outstanding Referrals: 2									
	Last BMI %: 3.9 Weight Change (6 Mo.): -10 lbs. Last BP: 115/65 Last PHQ: 7									
	Due: Asthma Treatment, Annual Exam									
8:45 AM	Dr. Tim Ellis	Dietary Specialist	Checkup	103 Johnny Elderberry	10	M	English	White	Dr. Tim Silver	1.43
B	Reason: Persistent Headaches History (12 Mo.): No Shows: 1 Cancelled: 4 Visits: 2 ER: 0 Admits: 0 Last Visit DR: Dr. Tim Ellis Outstanding Referrals: 0									
	Last BMI %: 58 Weight Change (6 Mo.): +2 lbs. Last BP: 110/65 Last PHQ: 7									

Huddle Help on the Team Guide Site



TOOLKITS

Resources for Effective Huddles

Explore resources developed by one LEAP site to help care teams run effective huddles focused on making the most of patient care visits. This document contains: a description of team huddles (and how they differ from other team meetings), strategies and a checklist for good huddles, and a self-assessment.

[Download document](#) ↓

Attribution: Cambridge Health Alliance - Union Square Family Health



WORKFLOW

Care Team Huddle roles and responsibilities

Learn from the protocol used to guide team huddles at one LEAP site. Notice the various pieces of information prepared in advance by each team member, so that the huddle is efficient and effective to coordinate care for patients during each shift.

[Download document](#) ↓

Attribution: West County Health Centers, Inc.

<http://improvingprimarycare.org/search?keyword=huddle>

Managing Capacity and Demand, Cont.



Coleman Associates

+ Next Steps

For the April Webinar be prepared to learn about and discuss

- Simplified Patient Scheduling
- Decreasing Appointment Types
- Standby Schedules
- Flow Coordination and Tetris-ing as it relates to the new schedule template



Continuing to Improve Access

April 16, 2015



+ Begin with the End in Mind (Steven Covey)

- Reminder: the point in reducing No Shows and simplifying the schedule is to improve access and make space to see your patients when they need to be seen.
- No Shows (should be down)
- Missed Ops (should be down)
- Capacity used (should be up)
- Continuity (should be up)
- TNAA (should be down)

+ Today..

- Follow up from last webinar:
 - How do you coordinate QuickStart with Huddles?
 - Have you been QuickStarting? What have been your challenges to QS?
- How many appointment types do you have now? What types of appointments did you find you could cut out?
- How have you done with scrubbing the schedule and raking patients into today's schedule?
- How is all of this affecting your Third Next Available Appointment (TNAA)?

+ Simplified Scheduling

- What “types” of appointments have you kept?
- How do you coordinate them and who can book into them?

+ Moderating Demand – Scrubbing and Raking

- What types of patients are best scrubbed out of the schedule?
 - WNK – Want, Need, will Keep the appointment
 - Follow ups that are appointed just so we don't "lose track of them"
 - What other patterns did you find?
- Raking Tips and Tricks
 - Where do you find patients to rake into the current schedule?
 - When do you call them?
 - Who calls them?
 - How does a flow coordinator help in this work?

+ Schedules and Coordination

- Use the Atlantic City Play (e.g. Lyon Martin using poker chips)
- Use a standby schedule to *'hold'* patients you *'know'* you can see.
- How do you know if you need a flow coordinator? It's about risk management...
- Focus on continuity and cycle time.

Events & Reminders



Complete list of events and reminders on program page: www.expandingaccess.wikidot.com

Upcoming Events

- Next Monthly webinar on Thursday, May 21 on change management led by Dr. Carolyn Shepherd
- Exemplar clinic site visits scheduled in May- attendees will hear from Susannah in the upcoming weeks with more details

Reminders

- Continue to work on your team's project goals outlined in your February work plan.
- Next quarterly reporting due April 30
- Ongoing project team interviews with CCHE

Webinar survey on next slide →