



Mini Pii Session

Integrated Health Treatment Planning and Implementation

September 11, 2019

Dr. Michael Franczak, Director of Population Health and Michaela Statt, Director of Health Information Management from Partners in Recovery (PIR) presented on *Integrated Health Treatment Planning and Implementation*. PIR operates 5 integrated health homes, one medical ACT team (stand-alone clinic), and one rural FQHC partnership and serves 8,000 adults with serious mental illness in Maricopa County. PIR's mission statement is "Transforming lives through passion, innovation, and action".

The presentation highlighted how team-based care is best practice as the complexity of chronic and co-morbid conditions continues to increase. Practices must go from being "cylinders of excellence", according to Dr. Franczak, to collaborating and coordinating care with a team that includes a variety of staff at different levels within the practice and focuses on the member's voice as a critical and equal part of treatment planning.

The presentation covered critical elements to team-based care that included:

- Making sure cross training of all staff occur so that behavioral health staff learn about physical health conditions and medical staff understand behavioral health and to ensure that the same language can be spoken amongst staff.
- Leadership should assist staff in understanding the everyday reasons for team-based care. Staff also need to understand value-based contracting and the importance of their role in the overall business plan.
- Staff from many different levels should have input on the development of your practice's integrated health plan to ensure nothing critical is missed.
- Set up workflows and processes to ensure that everyone on the integrated care team has input into the integrated care plan and that it allows for clinical staff consults when needed.
- When creating your practice's integrated health plan, make sure to make the most use of your electronic health record (EHR) to make it intuitive and user friendly on all levels.
- Involve champions at all staffing levels and at all locations to aid in the success of team-based care.
- Make sure to build a culture where all team members value and feel respected at all levels.
- Create set times for daily huddles for team members. Also ensure that a collaborative environment is nurtured where all levels of staff remain flexible and available to collaborate and coordinate a patient's care during the day whenever needed.
- Develop collaborative protocols that all levels understand that include when and how to make referrals, when to schedule follow up care, etc.
- PIR created integrated care coordinator positions that serve as liaisons between the care team, the patient, and providers out in the community. These staff follow up with high needs patients and manage gaps in care.
- A stringent audit plan must be put in place to review and monitor integrated care plans to ensure they are truly integrated, to monitor that appropriate referrals are being made in a timely manner, to look for opportunities to improve upon the plan in the EHR, and to verify that member voice is present on each plan.

Integrated Treatment Planning and Implementation

PARTNERS IN RECOVERY

Developing an Interdisciplinary Team is the Key

- ▶ The Institute of Medicine's Report funded by Robert Wood Johnson highlighted the significant role that team-based care plays in health care.
- ▶ The report states, "As the delivery of care becomes more complex across a wide range of settings, and the need to coordinate care among multiple providers becomes ever more important, developing well-functioning teams becomes a crucial objective throughout the health care system."

Knowledge, skills, and networks

- ▶ Effective teamwork promotes the **active participation** of each discipline in member care, where all disciplines are **working together** and fully **engaging members** and those who support them, and leadership on the team **adapts based on the person's needs**.
- ▶ Effective teamwork **enhances member and family-centered goals and values**, provides mechanisms for **continuous communication** among caregivers, and optimizes **participation in clinical decision-making within and across disciplines**.
- ▶ It builds **respect for the contributions of all professionals**.

Teamwork leads to an integrated plan with shared goals and outcomes

- ▶ So how do you build a team based approach?
- ▶ What does an Integrated Treatment Plan look like?

Steps to a Team Based Approach

- ▶ Isolation (Silos)
- ▶ Communication
- ▶ Coordination
- ▶ Collaboration
- ▶ Integration

Donabedian's Model of Measures

- ▶ **Structure**
 - ▶ Physical equipment and facilities
- ▶ **Process**
 - ▶ How the system works
- ▶ **Outcome**
 - ▶ The final product, results



The Donabedian Approach

Begin to redesign starting with identifying:

- ▶ Outcomes
- ▶ Process
- ▶ Structures

Outcome and Structure

- ▶ So if an Integrated Plan is the Outcome how do we develop the structure and processes to make it happen?
- ▶ Structure:
 - ▶ What staff do we need to have on board?
 - ▶ What are their qualifications and experience?
 - ▶ What does the physical plant need to look like?
 - ▶ What additional equipment do we need to have?
 - ▶ What are we forgetting?

Outcome and Process

- ▶ Process:
 - ▶ What does an integrated workflow look like?
 - ▶ How and when do the staff communicate?
 - ▶ How is scheduling coordinated?
 - ▶ What additional training do each of the staff need so that they are familiar with each others skills?
 - ▶ Who pulls the pieces together for the plan development?
 - ▶ Who monitors and reports on progress to the team?

Specific Steps in developing an Integrated Treatment or Care Plan

- ▶ Identify where your practice is currently at on the road to integration.
- ▶ The IPAT or Integrated Practice Assessment Tool is a useful measure.
- ▶ Decide what your Integrated Plan will include (essentially what is your projected Outcome).
- ▶ This will determine what staff and facility you need to have to develop and implement the plan. (essentially your structure)

Specific Steps in developing an Integrated Treatment or Care Plan

- ▶ Develop workflows of how the staff interact so that an integrated plan can be created.
- ▶ Train staff of basic health conditions that will be addressed by the interdisciplinary team.
- ▶ Develop workflows for how and when assessments and screenings will be conducted.
- ▶ Develop workflows for scheduling, Team Huddles and Staffings.
- ▶ Create a clear and simple Integrated Plan Template in your EMR which prompts staff to capture social, behavioral, and medical components.
- ▶ When possible, automate treatment needs/goals from multidisciplinary teams to pull into Integrated Plan.

Specific Steps in developing an Integrated Treatment or Care Plan

- ▶ All staff may not be familiar with creating measurable goals and objectives. Provide training.
- ▶ Ensure that plans are reviewed as they are developed to ensure that everyone has a clear understanding of the desired outcome.
- ▶ Build momentum to achieve the desired outcome and ensure that inadequate plans are corrected as you go so that each one is a learning experience.
- ▶ Identify champions and have them serve as mentors to staff who are struggling.

Guiding Principles

- ▶ **It takes time.** This work does not happen overnight—it takes time, patience, and perseverance to build interdisciplinary collaboration, supported by leadership and the ability to think long-term.
- ▶ **Relationships matter.** People are the building blocks of teams—developing relationships between and among team members makes a difference.

Guiding Principles

- ▶ **Pockets of interdisciplinary practice already exist.** Creating an environment for interdisciplinary collaboration is not a linear process—if you look, you will find that the kind of interdisciplinary practice you want to create is already happening in small ways inside your organization.
- ▶ These “pockets” of promise can be highlighted, resourced, and spread

Guiding Principles

- ▶ **Creating a culture of interdisciplinary collaboration requires multiple reinforcing practices.** Mutually reinforcing practices work together to eventually shape an organization in which "this is just how we do things around here"—a definition of culture.

Demonstrate leadership commitment to interdisciplinary collaboration as an organizational priority through words and actions

- ▶ Partnership among administrative and clinic leadership at all levels was essential to each site's ability to focus on interdisciplinary collaboration.
- ▶ Talking about interdisciplinary collaboration is important, but people need to see it in action to understand what collaboration really means, and that it is an organizational commitment.

Create a level playing field that enables team members to work at the top of their license, know their roles, and understand the value they contribute

- ▶ You need a way to look beyond the silos, history of professional training, and identity to help team members feel like they can make a meaningful contribution to the work.
- ▶ In other words, the “level playing field” mitigates the hierarchy and enables team members to experience their individual contributions and collective value.
- ▶ Numerous organizations do this by engaging interprofessional teams in quality improvement, safety, and process improvement work.
- ▶ This work requires team members to learn new language, skills, and expertise together, with the benefit of also learning what each team member actually does for the team.

Cultivate effective team communication.

- ▶ Communication, communication, communication is a key driver of interprofessional collaboration. Each profession brings with it its own language and way of communicating.
- ▶ Enabling team members with shared language and tools to promote effective communication helps overcome the barriers associated with the different communication styles and expectations that can impede collaboration.
- ▶ **Warm Hand Off-** Ensuring that you are connecting a member to the service you are referring them to, rather than sending a referral and hoping the connection is made.

Next Steps

- ▶ Upon implementing an Integrated Care Plan, routinely audit/review the plans to ensure they are truly "Integrated"
- ▶ Share audit results with Leaders & Direct Care Staff
- ▶ Identify additional training needs,
- ▶ PRACTICE, PRACTICE, PRACTICE