

Optimizing Clinic & PCN Team Supports to Enhance Patient Care Using Panel Management Processes

Welcome! Thank you for joining early

Start Time: 12:00 PM promptly

- Your **mic** and **camera** are enabled by default
- Please **mute** yourself
- **To ask questions:**
 - Click **'raise hand'** during presentation; moderator will invite you to unmute during the question period
 - At any time, type questions in the **'chat box'**



Optimizing Clinic & PCN Team Supports to Enhance Patient Care Using Panel Management Processes

Webinar Series:
Maintaining and Optimizing Your Practice
During Times of Rapid Change

**We will be starting the
session promptly at 12:00 PM**

Zoom Instructions



Zoom technical support
(+1.888.799.9666 ext. 2)

viewing Anthonia Taiwo's screen View Options ▾

Zoom Ratio	Fit to Window ▸	✓ Fit to Window
		50%
		100% (Original Size)
		150%
		200%
		300%
		Stop Participant's Sharing

Mark Watt

an Mudry

Needs - A Stepwise Approach to Delivering Care for

Slide Show Review View Add-ins

Zoom Instructions

- Zoom technical support **(+1.888.799.9666 ext 2)**

Live Recording

- Privacy Statement: Please note that the webinar you are participating in is being recorded. By participating, you understand and consent to the webinar being made publicly available via a link on the AMA website for an undetermined length of time.
- By participating in the chat and live Q&A, your name entered into the Zoom sign-in may be visible to other participants during the webinar and/or in the recording.

Land Acknowledgment

We would like to recognize that we are webcasting from, and to, many different parts of Alberta today. The province of Alberta is located on Treaty 6, Treaty 7 and Treaty 8 territory and is a traditional meeting ground and home for many Indigenous Peoples.

Disclosure of Financial Support

This program has not received any financial or in-kind support.

Presenters:

Dr. Brad Bahler

Family Physician, ACTT Medical Director,
Alberta Primary Care Alliance Chair

Dr. Ernst Greyvenstein

PCN Physician Lead, Calgary Zone
PCN Board Chair Calgary Zone

Dr. Sarah Smith

Family Physician, Edson Medical Center

Nicole Gleeson

Executive Director, Mosaic PCN

Q/A Chat Moderators:

Dr. Heather LaBorde

Family physician, AMA Physician Champion

Dr. Joseph Ojedokun

Family Physician, AMA Physician Champion
(North Zone)

Dr. Janet Craig

Family Physician, AMA Physician Champion
(Edmonton Zone)

Dr. Bill Hendriks

Family Physician, AMA Physician Champion
(Central Zone)

Dr. Van Nguyen

Family Physician, AMA Physician Champion
(Calgary Zone)

Dr. Michelle Warren

Family Physician, AMA President-Elect

AMA Staff

Presenter Disclosure

- Brad Bahler: AMA-physician contractor, CIHR grant
- Ernst Greyvenstein: None
- Sarah Smith: Advisory board-ACFP, UofA; honoraria-AMA, ACFP, Astra Zenica, HQCA
- Nicole Gleeson: None

Moderator Disclosure

- Joseph Ojedokun: AMA-physician contractor, UofA-faculty appointment
- Michelle Warren: Honoraria-AMA; associate professor-UofA, UofC
- Heather LaBoarde: AMA Physician Champion
- Van Nguyen: AMA Physician Champion
- Janet Craig: AMA-physician contractor, Honoraria - UofA, Custom Learning Systems, Alberta AIM, AMA, Edmonton West PCN
- Bill Hendriks: AMA-physician contractor; advisory board - Bristol-Myers Squibb, Bayer, Valeant, Pfizer, Sunovion, Novartis, GSK, Eli Lilly, Janssen, Boehringer Ingelheim, Allerban, Lundbeck, Novo Nordisk
- Lori Choma: AMA-employee
- Caroline Garland: AMA-employee
- Barbra McCaffrey: AMA-contractor
- Kari Remington: AMA-employee
- Sue Peters: AMA-contractor, IBI Group-contractor, honoraria-HQCA
- Sean Miles: AMA-employee; ThinkFX Performance Group Inc.-director

Welcome from AMA Board



Session Overview



Panel Identification



Team optimization



Information Exchange



Outreach



Care Coordination



Upcoming Webinars & Resources



Questions and Wrap-Up

Learning Objectives

At the end of this session participants will be able to:

- Describe how to optimize clinic and PCN team supports to enhance patient care using panel management processes
- Describe how to use a PCN and Zonal panel management approach to enhance care for at risk patients

Presenters



Dr. Sarah Smith
Family Medicine



Dr. Ernst Greyvenstein
PCN Lead Physician, Calgary Zone
South Calgary & PCN Board Chair



Nicole Gleeson
Executive Director,
Mosaic PCN

Panel Management

What is it?

- Proactive team approach
- Care offered to a defined panel of patients
- Focuses on broader needs of the patient



How do I do it?

- Clinic teams review panel lists and reach out to offer care (virtually or in-person)
- Look at patient status, conditions, risk factors, and care needs
- Important for at-risk, vulnerable and complex patients

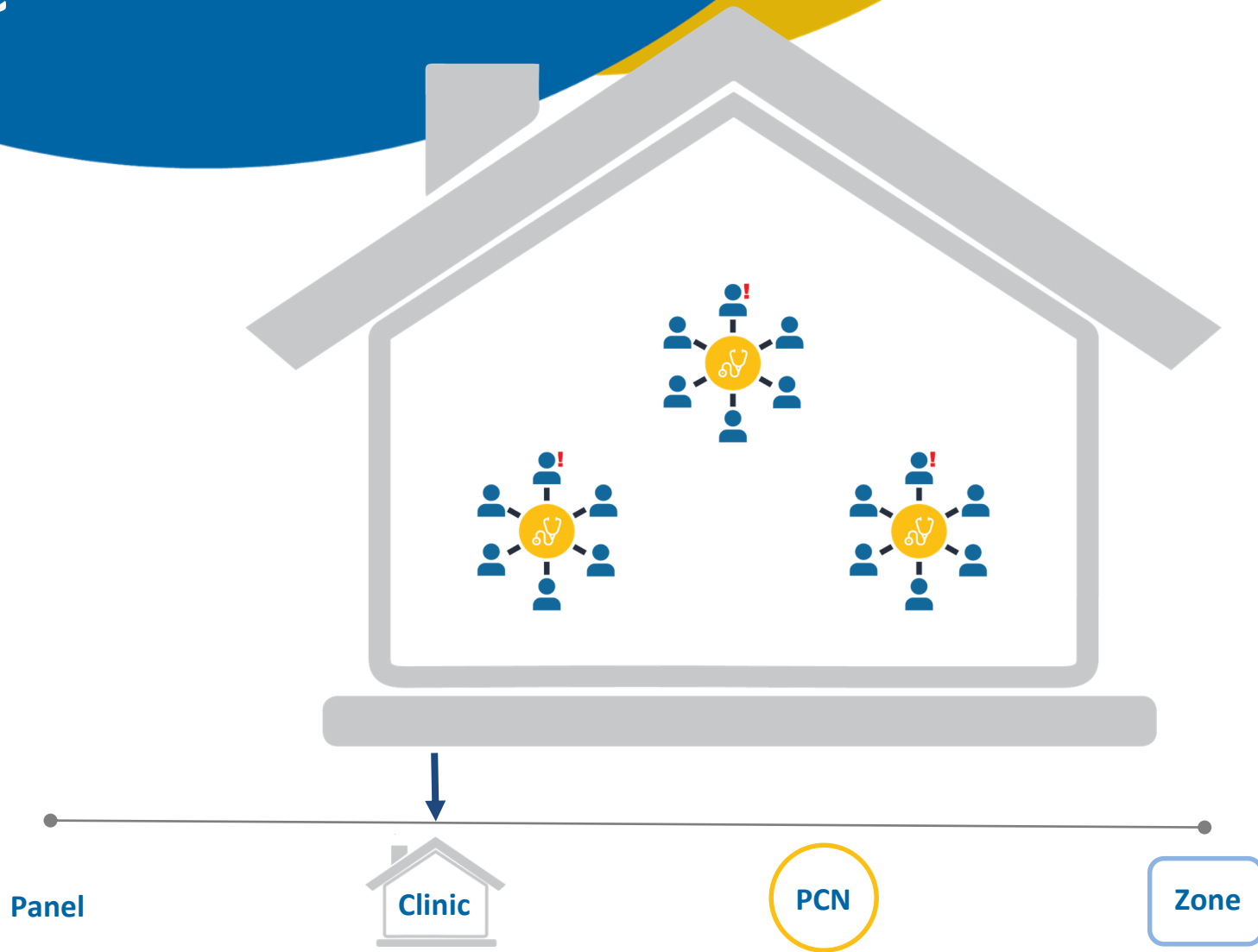
Panel



! = At-Risk Patient



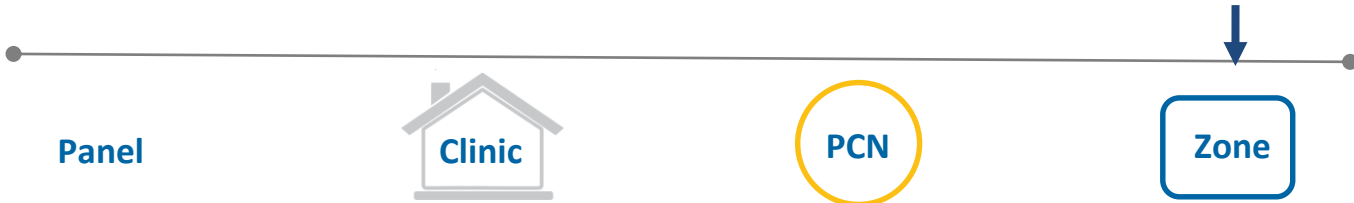
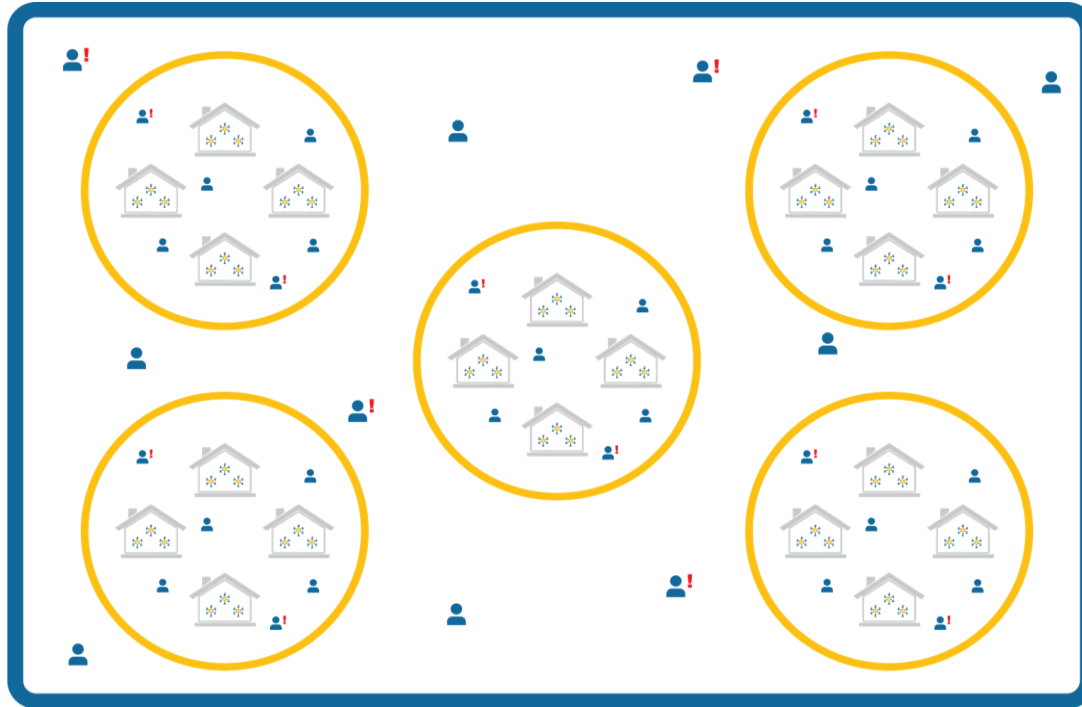
Clinic



Primary Care Network

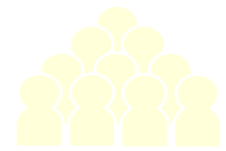


Zone



Approach to Panel Management





KNOW YOUR PANEL

- Commit to continuity and access
- Identify patient panel list
- Maintain accurate panel lists
- Understand the panel characteristics
- Assess the needs of the panel (including social determinants)
- Utilize support team to support panel processes



**PROVIDE
ACCESS &
CONTINUITY OF
CARE TO YOUR
PANEL**

- Access & continuity to patients are linked
- Reduce demand for appointments
- Increase supply to support appointments
- Reduce variation
- Recalibrate the system



MANAGE YOUR PANEL

- Identify panel segments
- Optimize team for clinical care delivery
- Optimize information exchange for care delivery
- Offer outreach & opportunistic care
- Coordinate care within the Health Neighborhood

**MANAGE YOUR
PANEL**

**IDENTIFY
PANEL
SEGMENTS**

**OPTIMIZE
TEAM FOR
CLINICAL CARE
DELIVERY**

**OPTIMIZE
INFORMATION
EXCHANGE
FOR CARE
DELIVERY**

**OFFER
OUTREACH AND
OPPORTUNISTIC
CARE**

**COORDINATE
CARE WITHIN THE
HEALTH
NEIGHBOURHOOD**

Panel Management



Dr. Sarah Smith

Family Physician

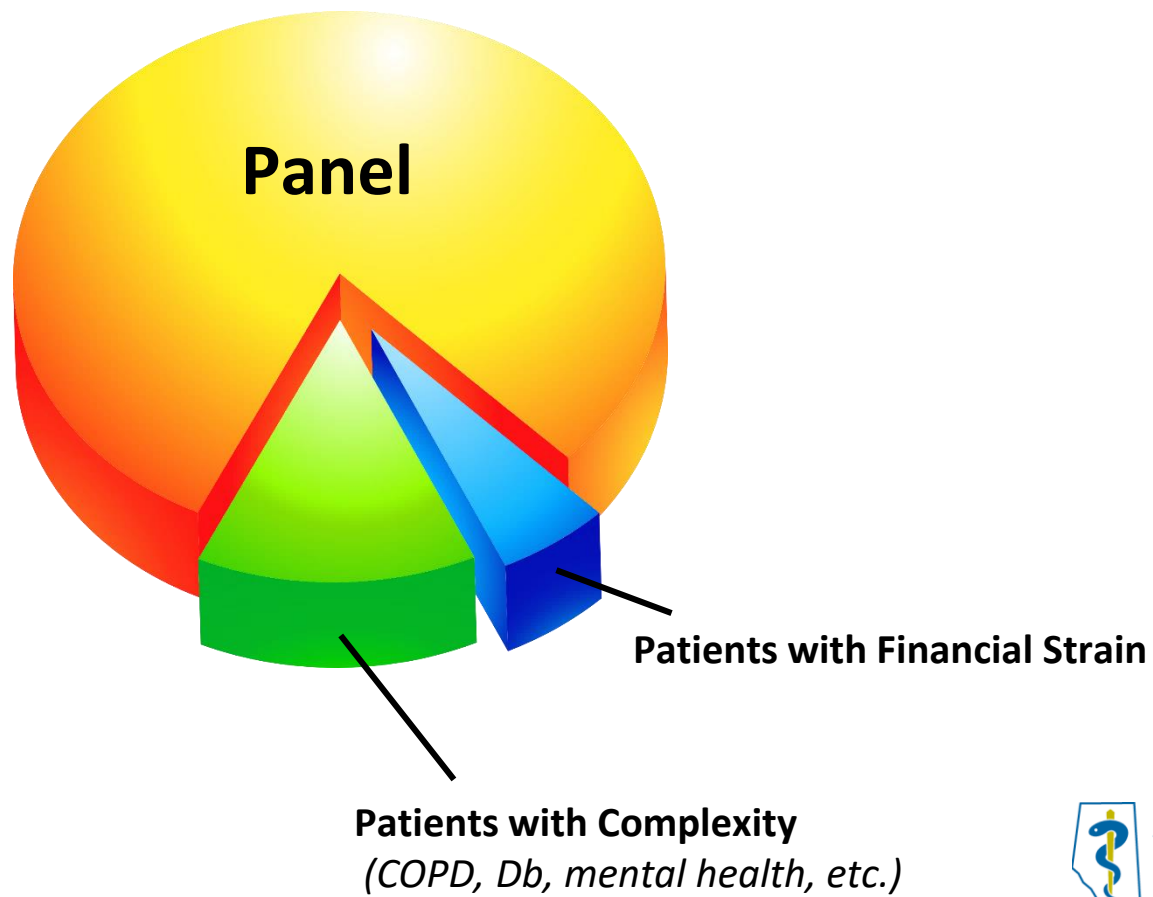


IDENTIFY PANEL SEGMENTS

- Identify panel segments
 - characteristics & conditions
- Identify screening populations
 - vulnerable, complex, other



IDENTIFY PANEL SEGMENTS





**OPTIMIZE TEAM
FOR CLINICAL
CARE DELIVERY**

- Identify team supports within the clinic
- Identify team supports with the PCN
- Organize team around panel vs disease state
- Plan & huddle with your team to meet the panel needs



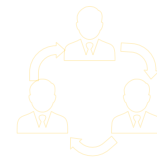
**OPTIMIZE TEAM
FOR CLINICAL
CARE DELIVERY**





**OPTIMIZE
INFORMATION
EXCHANGE FOR
CARE DELIVERY**

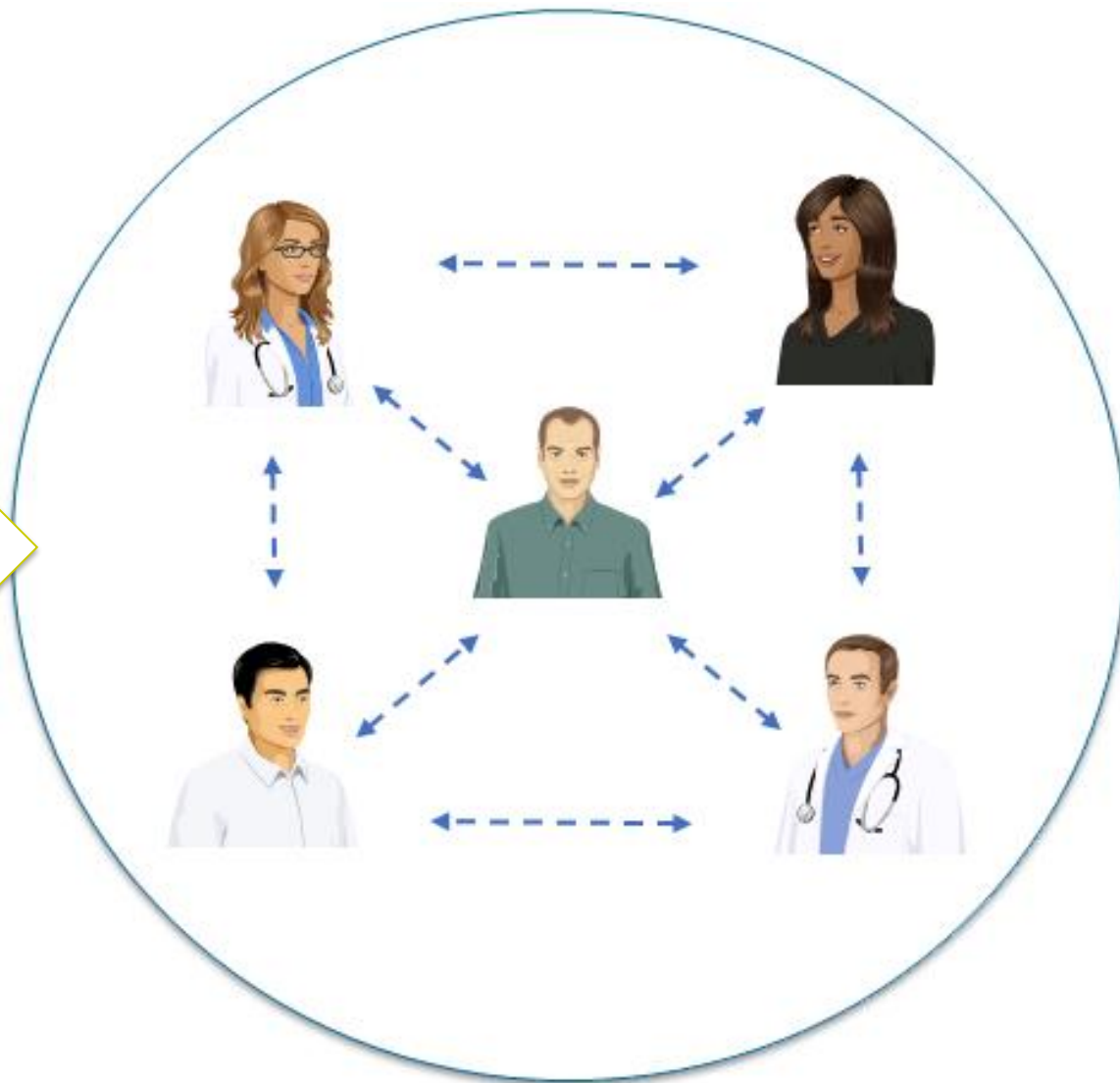
- Implement CII and CPAR
- Define sender & receiver needs
- Review eNotifications
- Share clinical care protocols
- Initiate a shared care process



**OPTIMIZE
INFORMATION
EXCHANGE FOR
CARE DELIVERY**



CI/CPAR





**OFFER
OUTREACH AND
OPPORTUNISTIC
CARE**

- Use a whole person approach vs disease specific
- Test & implement outreach & opportunistic offers of care
- Address more than one need of the patient



**OFFER
OUTREACH AND
OPPORTUNISTIC
CARE**



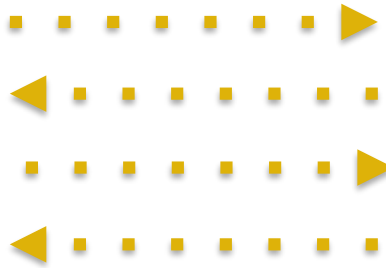


**COORDINATE
CARE WITHIN THE
HEALTH
NEIGHBORHOOD**

- ID & coordinate with other providers of care
- Optimize other team members contributions
- Determine provider information & handoff needs
- Document in a shared care plan



COORDINATE CARE WITHIN THE HEALTH NEIGHBORHOOD



Patient's Medical Home

**Provide Access & Continuity of
Care to your Panel**



Dr. Ernst Greyvenstein

PCN Physician Lead, Calgary Zone

&

Nicole Gleeson

Mosaic PCN Executive Director

Zone Perspective

**COORDINATE
CARE WITHIN THE
HEALTH
NEIGHBOURHOOD**

**OFFER
OUTREACH AND
OPPORTUNISTIC
CARE**

**OPTIMIZE
INFORMATION
EXCHANGE
FOR CARE
DELIVERY**

**OPTIMIZE
TEAM FOR
CLINICAL CARE
DELIVERY**

**IDENTIFY
PANEL
SEGMENTS**



COORDINATE
CARE WITHIN THE
HEALTH
NEIGHBORHOOD

Calgary Zone COVID-19 Response

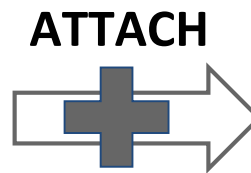
- Developed **key principles** for the zone
- Committed to use **existing** zone leadership structures
 - Zone governance & working groups
- Developed a **'Pandemic Response' document** with 3 pillars
 - Maintain medical home attachment
 - Cohort patients in centralized clinics
 - Partner with AHS to reduce burden on acute care



OFFER
OUTREACH AND
OPPORTUNISTIC
CARE



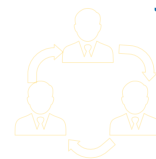
Unattached Patient



Patient's Medical Home
Primary Care COVID Pathway

social services
mental health
income support
food security
etc.







All patients

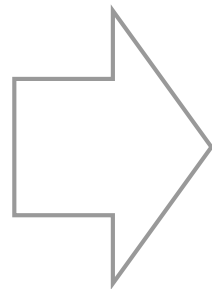


**OPTIMIZE
INFORMATION
EXCHANGE FOR
CARE DELIVERY**

**Stakeholders:
Communicate
Regularly**

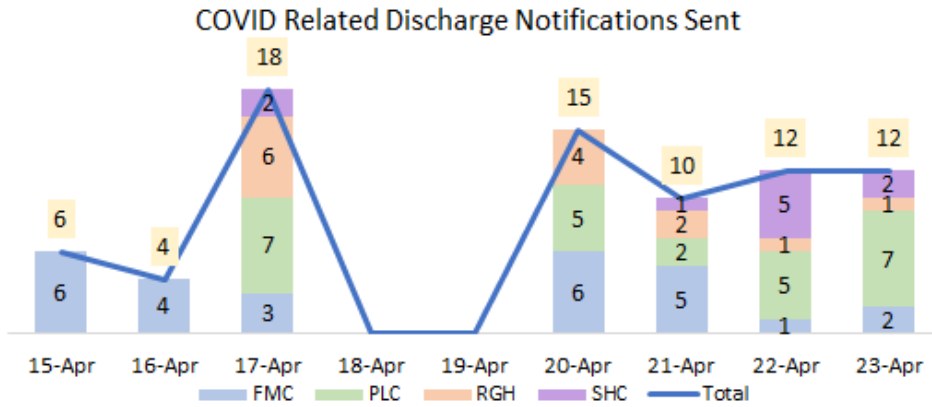
The Supported Transitions of the COVID Response

-  **811 Referrals**
-  **Support MOH with Follow Up of Positive Results**
-  **Notification of Hospital Discharge**
-  **Notification of Emergency Room Discharge**
-  **Warm Hand-over for Complex Hospital Discharges**
-  **Diversion of CTAS 4 & 5 from Emergency Rooms and Urgent Care Centers**

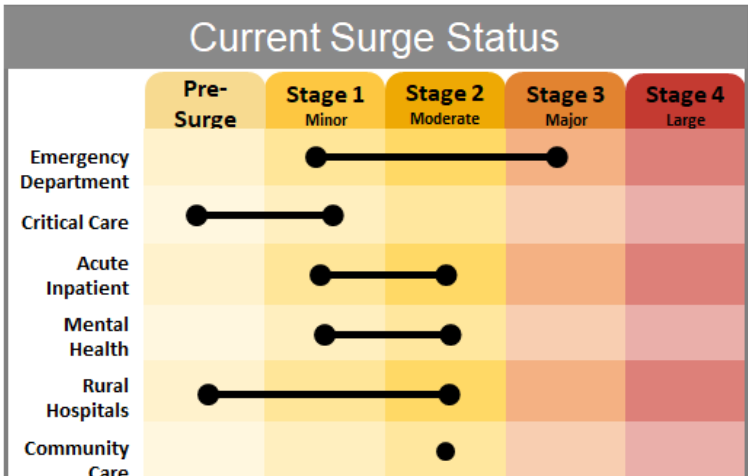


Patient's Medical Home

Tracking & Measuring Using Data to Inform Decisions



Calgary Zone COVID-19 Report for April 28, 2020



Good News Corner

Primary Care, Calgary Zone



CZ pathway downloads (April 6-26): **1,844**

Specialistlink.ca visits since state of emergency: **+86%**



COVID tele-advice calls (Apr 7-26): **173**

Total tele-advice calls (all specialties) since Alta declared state of emergency: **+73%**

MOH

MOH (non-Cargill) new referrals: **513**



FCC 4 Hour Referrals	PCN 4 Hour Referrals	PCN 24 Hour Referrals
193	101	671

193

101

671



**OPTIMIZE TEAM
FOR CLINICAL
CARE DELIVERY**

Health Neighborhood is the “team” for COVID

- MOH (Medical Office of Health)
- Health Link and COVID Testing Centers
- Communicable Disease Outbreak Management Team
- Specialty LINK, MD Connect
- RAAPID
- PCNs (and FCC in Calgary)
- ZEOC (Zone Emergency Operations Centre)
- Social and Community Supports
- (Calgary Zone) PCN COVID Access Clinics

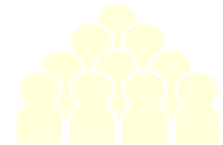


OPTIMIZE TEAM
FOR CLINICAL
CARE DELIVERY

Key Principles for Teams

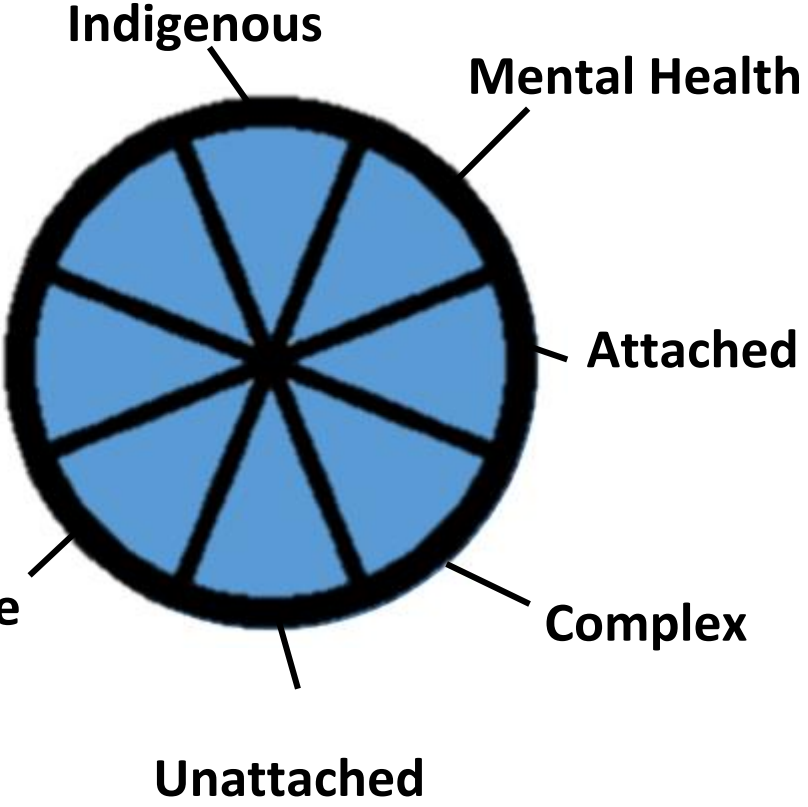
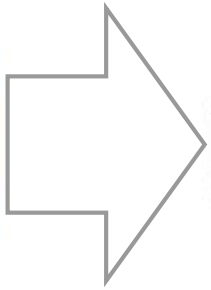


- ❖ Huddle often
- ❖ Clarify role and scope – leverage everyone
- ❖ Use continuous improvement principles - PDSA cycles every day
- ❖ Focus on problems and solutions – work through barriers quickly
- ❖ Be flexible and nimble
- ❖ Use data and measures
- ❖ Engaging with impact
- ❖ Amplify great work



IDENTIFY PANEL SEGMENTS

**COVID Positive
(or presumed)**





IDENTIFY PANEL SEGMENTS

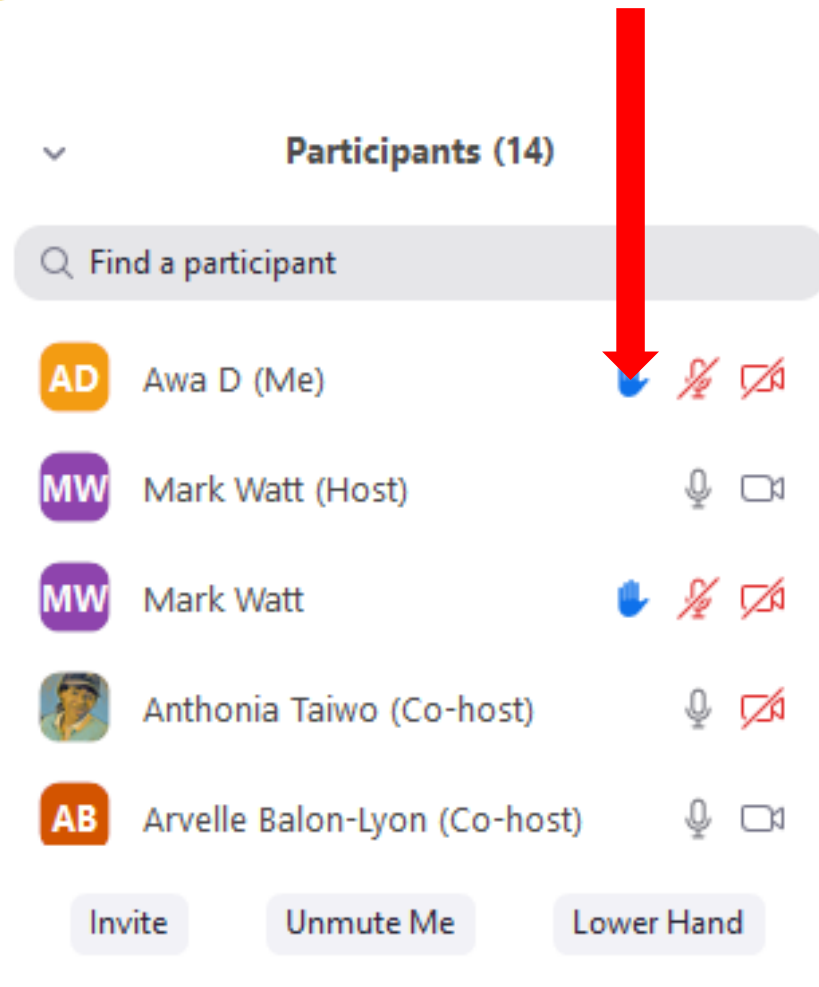
Key Principles



- Attachment to Patient's Medical Home as soon as possible
- Patient-Centered
- Allow PCNs to support their physician members and teams

Live Q&A

- Please put your virtual hand up by using the raise hand function under the 'participant' menu
- If using the phone, open the participant menu and scroll down to find the raise hand feature



The screenshot shows the 'Participants (14)' menu in a Zoom meeting. A red arrow points to the 'Raise Hand' icon (a blue hand) next to the user 'Awa D (Me)'. Other participants listed include Mark Watt (Host), Mark Watt, Anthonia Taiwo (Co-host), and Arvelle Balon-Lyon (Co-host). At the bottom of the menu are buttons for 'Invite', 'Unmute Me', and 'Lower Hand'.

Participant	Hand Up	Mute	Video
AD Awa D (Me)	Yes	Off	Off
MW Mark Watt (Host)	No	Off	Off
MW Mark Watt	Yes	Off	Off
AT Anthonia Taiwo (Co-host)	No	Off	Off
AB Arvelle Balon-Lyon (Co-host)	No	Off	Off

Upcoming Webinars & Resources



- Deeper dive into patient care processes for community specialist clinics
8th May 2020
- Stay tuned for future opportunities
actt.albertadoctors.org/cii-cpar



Available on:

- Apple Podcast
- Spotify
- Google Podcast
- Stitcher

Episodes:

15 | CII-CPAR: Part 1 with Dr. Heidi Fell

14 | Teamwork in the Time of COVID-19 with Dr. Rick Ward

7 | Care Planning for Continuity (and more!) with Dr. Sarah Smith

**Thank you and please
complete the post-
session evaluation!**

Evaluation

<https://interceptum.com/s/en/RC05012020>

