

CCALAC Care Team Dancing As A Patient Care Team – Part 2

March 17th & March 19th, 2021



+ Coleman Associates

Your Trainers:



Brizzia Burgos
Longmont, CO

Logistical Team Coordinator and Vroom! Administrator. Longmont, CO. Brizzia has been a mainstay in the Coleman family for over six years, leading the development and streamlining of our materials and production. Brizzia serves as the Coleman direct client support and administrator of Vroom! our online training platform (www.Vroom.Training). Brizzia is in charge of materials design, duplication, and shipping for all learning sessions which is a fancy way of saying that she has to catch all of the crazy requests and ideas flowing from her colleagues and turn them into tangible tools and get them where they need to go. She also handles all website updates, data reviews, webinar coordination, including all translation coordination for our Spanish language website. Brizzia provides direct support to the CEO and provides overall backup to the Associates.

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Your Trainers:



Harpreet Sanghera
Sacramento, CA

Project Manager, Process Redesigner & Trainer. Sacramento, CA. Harpreet truly enjoys the California sunshine, which is why she was born, raised, and hasn't left the state. She was a Clinic Manager at a Federally Qualified Health Center (FQHC) right outside Sacramento, CA. She started as the front office lead, worked as a Medical Assistant and Flow Coordinator. Harpreet also worked on her Quality Improvement team at her health center, and she is a graduate of the Clinic Leadership Institute (CLI) Program. Before becoming a process redesigner, she went through a Rapid DPI™ at her health center when she excelled and learned how to manage change and become a coach herself. With Coleman, Harpreet manages Rapid DPI™ projects, DPI™ collaboratives, leads the High Impact Management Program, leads many phone room redesign projects, and was a key Coach aka Passion Ignitor in redesigning immigration and naturalization services.

+ Learning Objectives



PARTICIPANTS WILL LEARN
METHODS TO AMP UP
COMMUNICATION
AMONGST THE PATIENT
CARE TEAM.



PARTICIPANTS WILL ADAPT
BEST PRACTICE
WORKFLOWS TO UTILIZE
AT THEIR OWN HEALTH
CENTER



PARTICIPANTS WILL LEARN
TACTICS TO ADOPT WITHIN
THEIR PATIENT CARE TEAM.

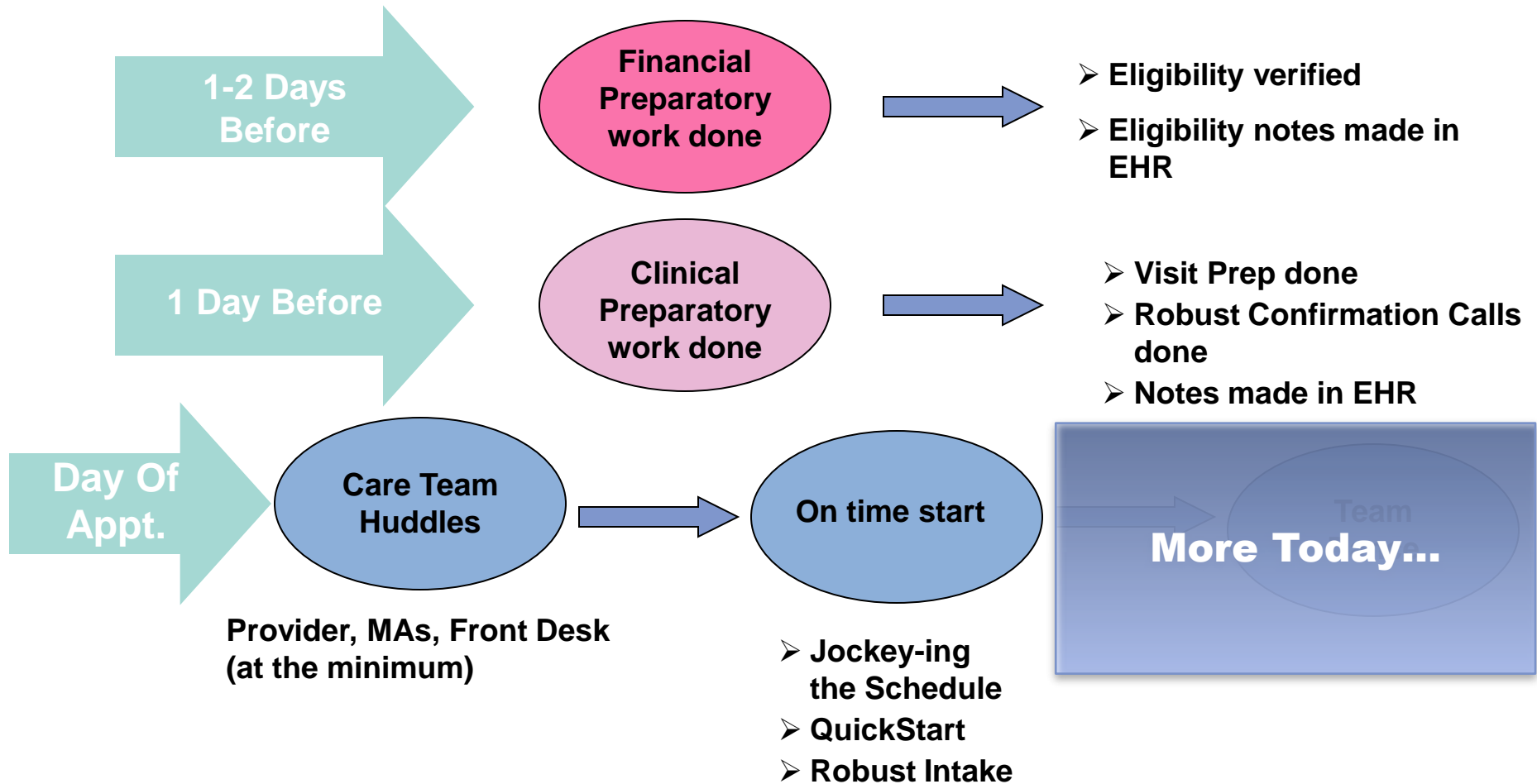
+ Today



Preparing for a New Normal Considerations:

- Well-coordinated execution
- Protective and reassuring for patients and staff
- Able to meet the needs of your communities

Let's Recap!



+ Today's Takeaways



Sheep & Shepherd



Red Carpeting & 30-Second Report

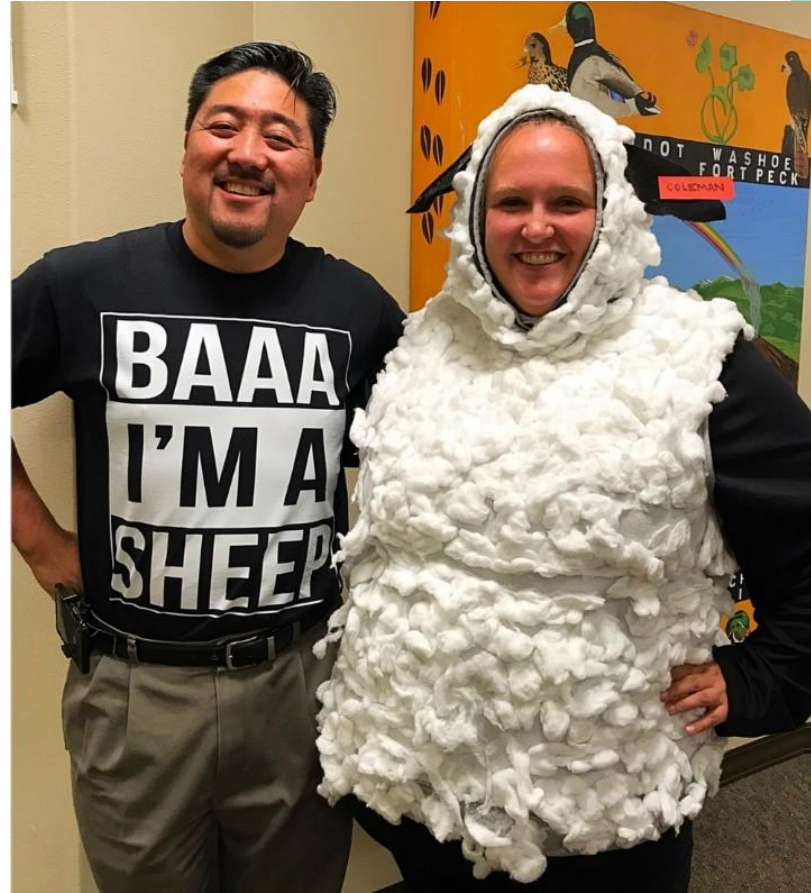


Charting in Real Time,
SoftLanding & The Debrief



Sheep & Shepherd

The MA acts as a shepherd guiding the provider (Sheep) throughout the clinic session.

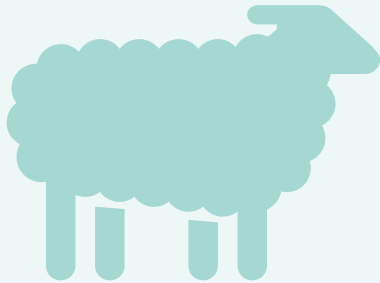


Shepherd's Role



- Coordinates patient care.
- Assesses the need for help from other PCTs by watching the data in real time.
- Works with the front desk on scheduling conflicts.
- Keeps the provider on track by minimizing distractions and communicating next steps.

Sheep's Role



- Be the Sheep... don't try to also be the shepherd.
- Allows the sheep to guide them instead of looking at the schedule.
- Focuses on direct patient care.
- Chart in real time.

+ Sheep and Shepherd

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HOW TO PERFORM THE MODEL:



VISIT PREP:

Reviews visit prep notes

Looks at, records, and prepares notes

HUDDLE:

Actively participates

Leads

30-SECOND REPORT:

Receives and responds to report

Prepares and communicates report

MIDWAY KNOCK:

Hands off orders or referrals
& wraps up second half of visit

Tracks time and performs knock

CHARTING:

Completes the charting

Makes sure charting is done before
moving provider on to next patient

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GROWING YOUR SHEPHERD



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Sheep & Shepherd Model



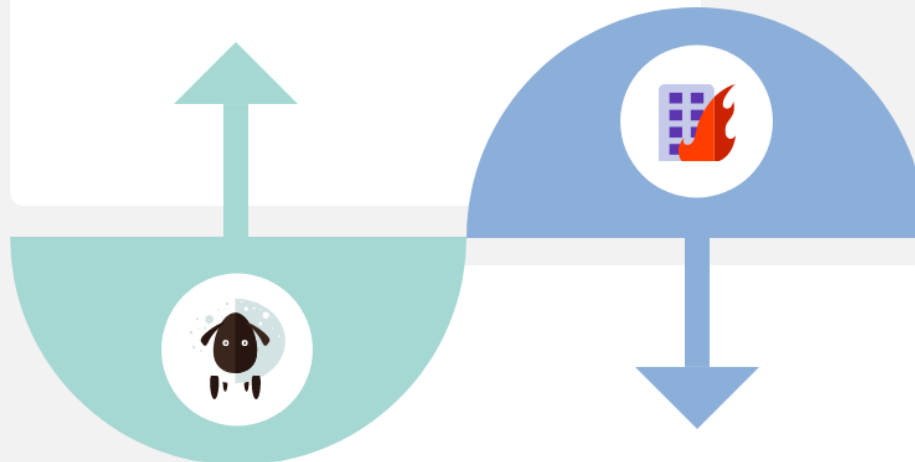
MA's ARE INDISPENSABLE-
MA's provide increased clinician support, are more engaged and fulfilled at work



PROVIDERS FEEL SUPPORTED- The burden of caring for an entire panel of patients is eased through structure, support and predictable days



PATIENTS ENJOY THEIR CARE-
Patients feel prepared for, taken care of and their waits are reduced and time is valued



Clinical Chaos Syndrome



DAYS FEEL OUT OF CONTROL - There is a feeling of dread, frustration, and loneliness amongst clinical staff



DAYS DRAG ON AND ON - Out of control days lead to staying late, charting at home and overtime expenses that impact the bottom line



PATIENTS ARE FRUSTRATED - Patients are kept on hold, can't get appointment times they want or are in the clinic too long for care





Communicate, Communicate, Communicate

Talk about everything in your team.

We only hear a portion of the info that comes to us—
pause, communicate with eye contact briefly.

At first you may feel silly, but when this is done well... teams wonder how they ever lived without this.

Check in often.



+ Today's Takeaways



+ Steps in the Team Dance



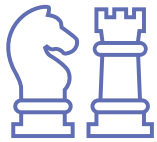
- Robust Confirmation Calls
- Visit Prep
- PCT Huddle
- QuickStart
- Jockey-ing the Schedule
- Robust Intake



- Red Carpet the patient
- 30-Second Report
- Midway Knock
- Sheep and Shepherd
- Red Carpet Exit
- Charting at the Time of Visit
- SoftLanding
- Over Communicate

+ The Team Dance Steps

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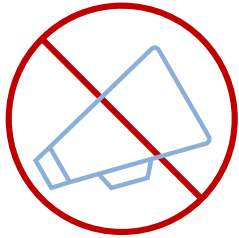
Each of you is a unique component of your team. Together your team can work more or less optimally together...



The Team Dance teaches you the steps to optimize your work together.

The Team Dance: *Red Carpet the Patient*

No more yelling out patient names in lobby!



1. MAs see patient arrival in EMR with description of patient.
2. MA walks to lobby, finds patient, and quietly tells them they are ready to take them back.
3. MA introduces themselves to patient and walks side-by-side to exam room to begin visit.

No private HIPAA information discussed in hallway.



RED CARPETING

RED CARPET ENTRY

- Go out in the waiting room (rather than yelling their name from the doorway)
- Walk side-by-side to the exam room (rather than patient trailing behind)

RED CARPET EXIT

- At the end of the visit (when possible) walk the patient to the door and ensure that all needs are met (rather than having them walk themselves out from the exam room)

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+ The Team Dance: *Robust Intake*

More than just getting vitals

The MA takes info learned in huddle and begins conversation with patient

Confirms reason for visit

Evaluates patient appearance, mood, behavior to gather clues to drive conversation



Goal is to gather as much info that will be helpful for provider

+Team Dance

30-Second Report

1

MA completes intake



2

MA searches for provider and asks if provider is ready to hear about next patient.



3

MA shares information learned during the Robust Intake



4

The provider gives MA instructions if appropriate and they try to anticipate what the provider might need for the visit



+ 30-Second Report

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The MA and provider confer briefly to discuss any new info, any labs ordered, other anticipated needs, and to redeploy themselves.

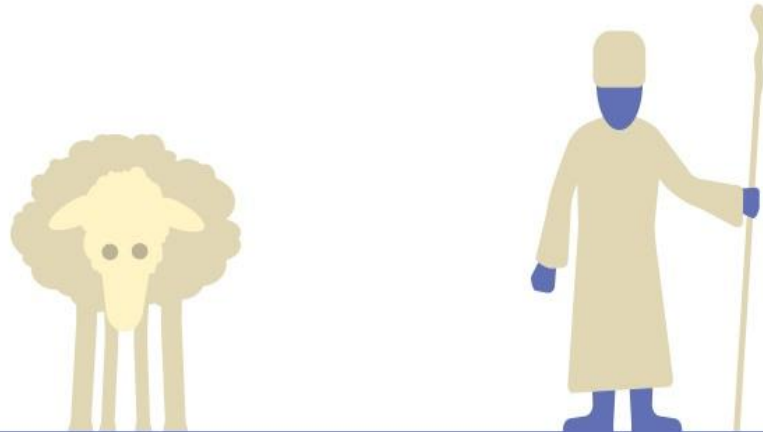


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+ Sheep and Shepherd

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+ Today's Takeaways





The Team Dance: *Chart at the Time of Visit*

Redesign Principle: **Do Today's Work Today!**



Provider charts as much as possible during the visit.



To avoid the “staring at the screen” syndrome, tell patient what you are doing as you document.

Getting all or almost all charts done means that the team's work is all **done**. It gives the MAs time to stay in sync and the providers don't have to take work home.



Chart At The Time Of Visit



Allow time to chart at the end of each visit.



Getting all or almost all charts done means that the team's work is all done

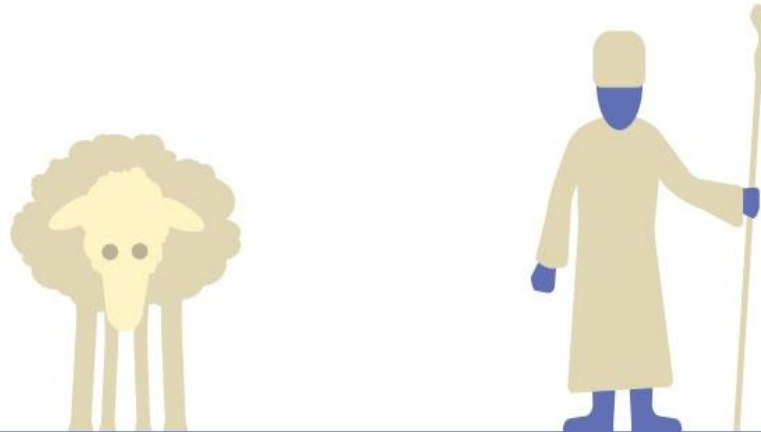


You can become more efficient seeing patients. It's faster to chart in the moment than to remember hours later.

+ Sheep and Shepherd

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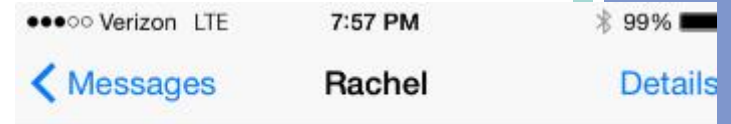
Success Stories

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Team Rachel + Alicia + Rebecca

Appt Time	In Time	Out Time	Cycle Time	Baseline = 82	Notes
7:40	7:34	7:58	24		✓
8:00	7:45	8:15	30		✓
8:40	8:35	8:55	20		✓
9:00	9:02	9:29	27		✓
9:20	9:14	9:55	39		✓
10:00	10:08	10:49	41		✓
10:20	10:28	11:02	54		✓
11:00	10:52	11:35	43		✓
11:20	11:04	12:07	63		✓
11:40	11:38	12:25	47		✓

Pts. Scheduled: 10 Avg Cycle Time 39.6 (52%)
Pts Seen 10 Charts Completed 10
#No-Shows 0 Pts Cancelled 1



Text Message
Today 7:21 PM

Amanda - finished by 5:20 got to see post op pt by 6pm and home by 7 to my hubby with NO work. I can look at the sunset tonight!!!!





QuickStart and SoftLanding

QuickStart and SoftLanding are bookends to each clinic session.

QUICKSTART & SOFTLAND

Keep the train running on time

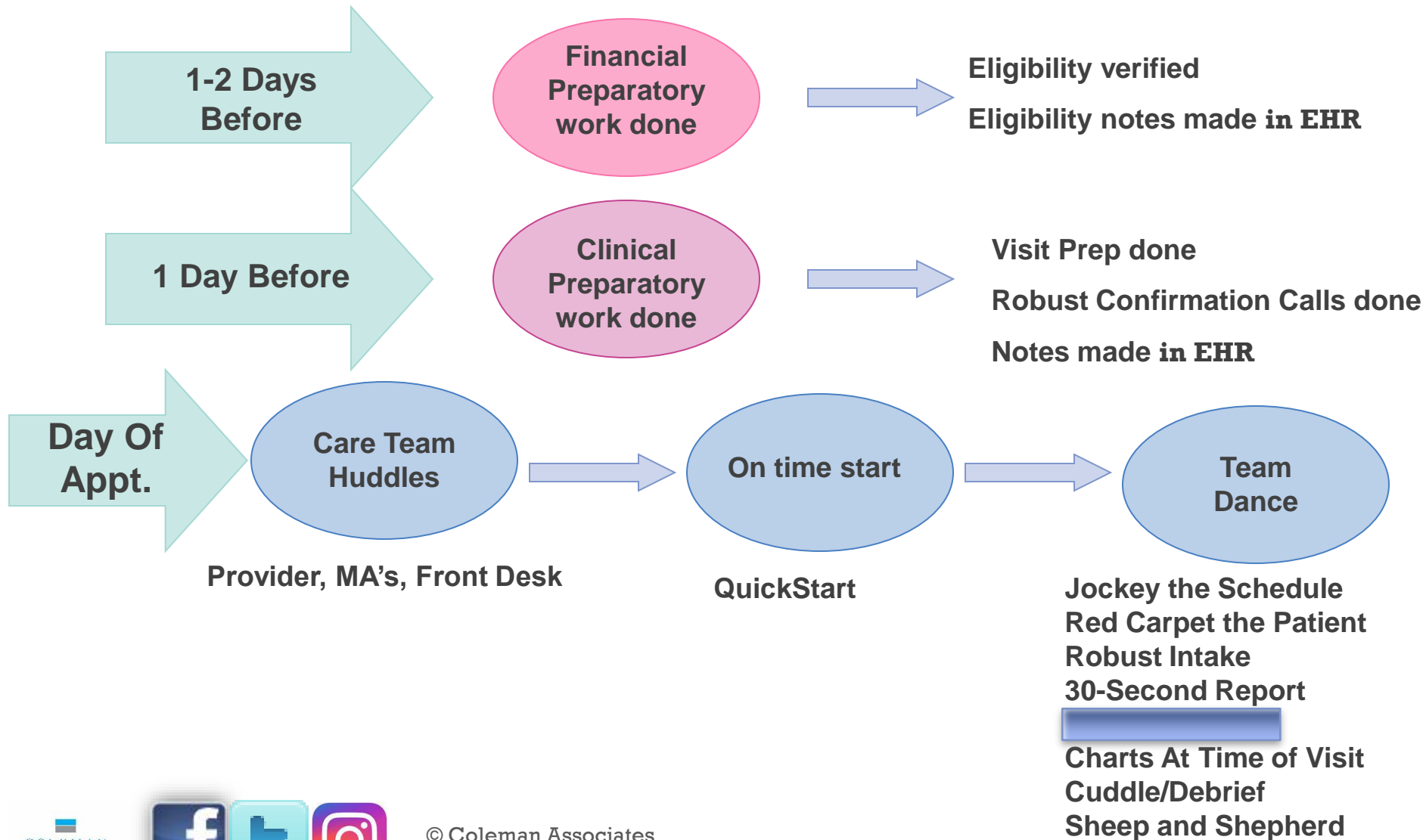


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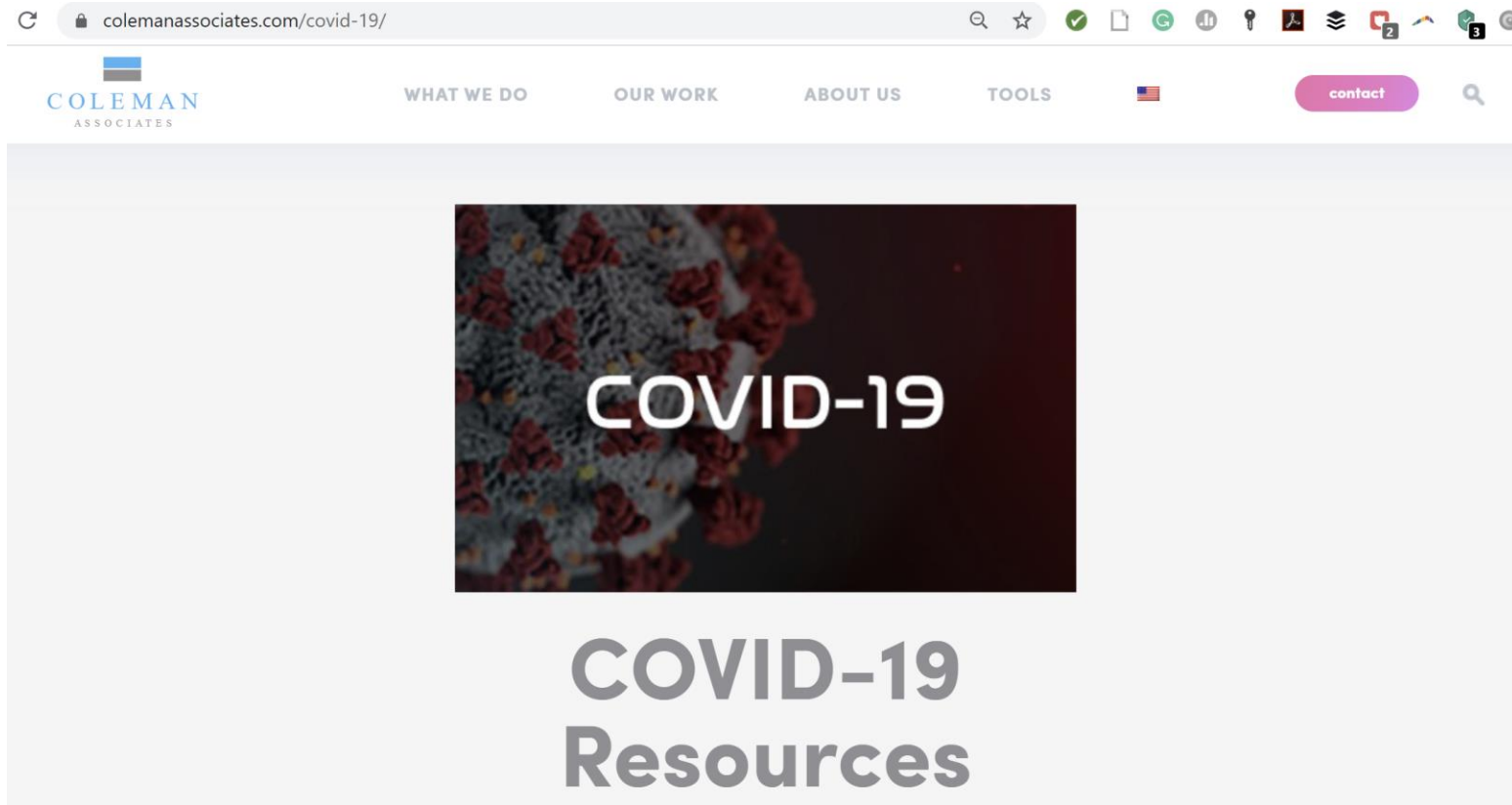
+ Today's Takeaways



Your New Visit Model

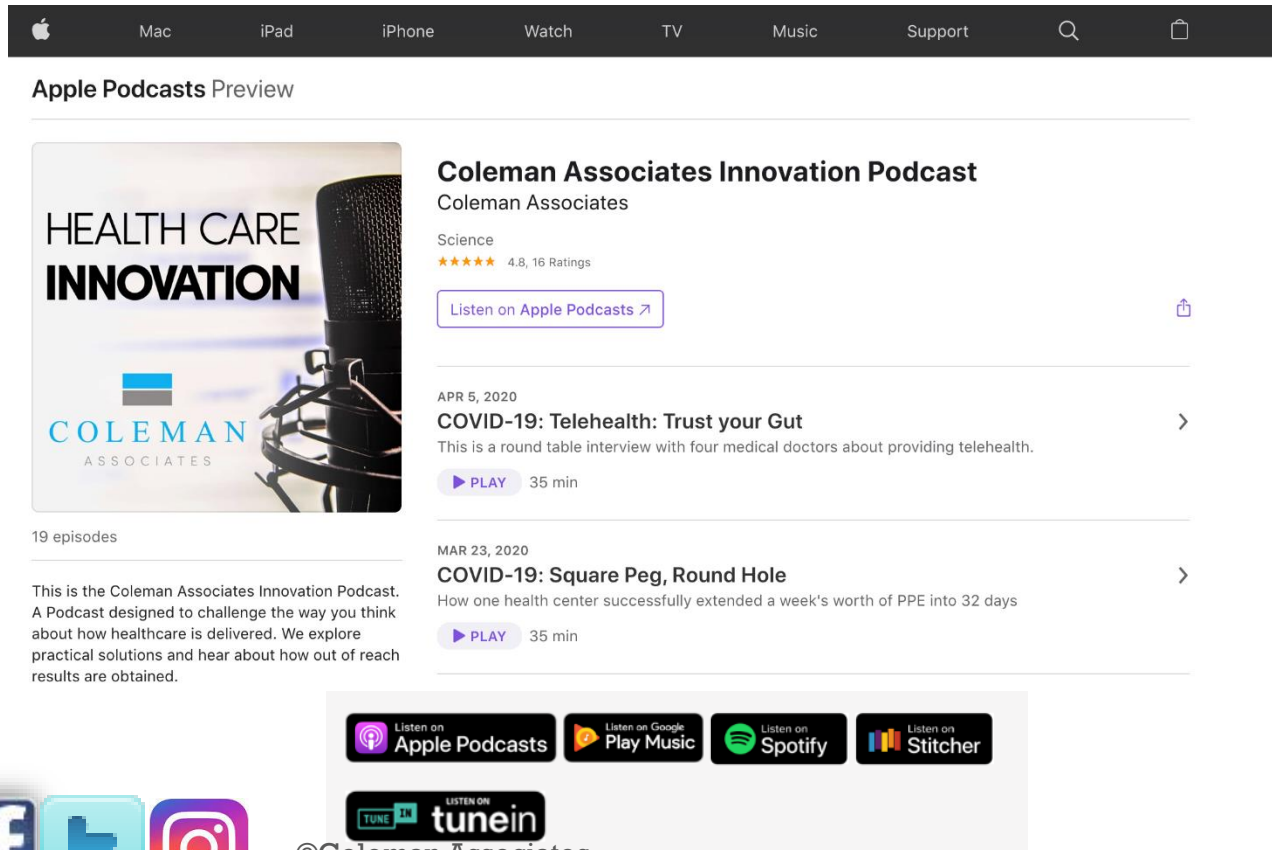


+ More Resources Are Available



+ Coleman Associates Innovation Podcast Instructions

1. Wherever you Listen to Podcasts
2. Search “Coleman Associates Innovation”



The screenshot shows the Apple Podcasts interface for the Coleman Associates Innovation Podcast. At the top is a navigation bar with links to Mac, iPad, iPhone, Watch, TV, Music, Support, a search icon, and a shopping bag icon. Below the navigation bar is the "Apple Podcasts Preview" section. On the left is a large podcast cover image featuring a microphone and the text "HEALTH CARE INNOVATION" and "COLEMAN ASSOCIATES". To the right of the cover, the podcast title "Coleman Associates Innovation Podcast" is displayed, followed by the publisher "Coleman Associates", the category "Science", and a rating of 4.8 stars from 16 reviews. A button labeled "Listen on Apple Podcasts" with a share icon is present. Below this, two episodes are listed: "COVID-19: Telehealth: Trust your Gut" (dated APR 5, 2020, 35 min) and "COVID-19: Square Peg, Round Hole" (dated MAR 23, 2020, 35 min). A description at the bottom states: "This is the Coleman Associates Innovation Podcast. A Podcast designed to challenge the way you think about how healthcare is delivered. We explore practical solutions and hear about how out of reach results are obtained." At the bottom of the page are social media icons for Facebook, Twitter, and Instagram, and a row of "Listen on" buttons for Apple Podcasts, Google Play Music, Spotify, and Stitcher. A "TUNEIN" logo is also visible.

Apple Podcasts Preview

Coleman Associates Innovation Podcast
Coleman Associates

Science
★★★★★ 4.8, 16 Ratings

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19 episodes

This is the Coleman Associates Innovation Podcast. A Podcast designed to challenge the way you think about how healthcare is delivered. We explore practical solutions and hear about how out of reach results are obtained.

APR 5, 2020
COVID-19: Telehealth: Trust your Gut
This is a round table interview with four medical doctors about providing telehealth.
[PLAY](#) 35 min

MAR 23, 2020
COVID-19: Square Peg, Round Hole
How one health center successfully extended a week's worth of PPE into 32 days
[PLAY](#) 35 min

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