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COMMUNITY CLINIC ASSOCIATION OF LOS ANGELES COUNTY

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

March 31st & April 2nd

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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.

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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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Learning Objectives

PARTICIPANTS WILL RECOGNIZE THE PRINCIPLES OF GREAT COMMUNICATION

PARTICIPANTS WILL SUMMARIZE BEST COMMUNICATION EXAMPLES FOR PATIENTS AND STAFF

PARTICIPANTS WILL APPLY THE LEARNED INFORMATION TO THEIR OWN SCHEDULED COMMUNICATION

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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

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Your New Visit Model

1-2 Days Before

Financial Preparatory work done

- Eligibility verified
- Eligibility notes made in EMR

1 Day Before

Clinical Preparatory work done

- Visit Prep done
- Robust Confirmation Calls done
- Notes made in EMR

Day Of Appt.

Care Team Huddles

Provider, MA's, Front Desk

On time start

QuickStart

Team Dance

Jockey the Schedule
Red Carpet the Patient
Robust Intake
30-Second Report
[redacted]
Charts At Time of Visit
Cuddle/Debrief
Sheep and Shepherd

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Today's Takeaways

Midway Knock

Communicating with Staff

Communicating with Patients

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Steps in the Team Dance

- Robust Confirmation Calls
- Visit Prep
- PCT Huddle
- QuickStart
- Jockey-ing the Schedule
- Red Carpeting
- Robust Intake
- 30-Second Report
- Sheep & Shepherd
- Red Carpet Exit
- Charting in Real Time
- SoftLanding
- Over Communicate

- Midway Knock

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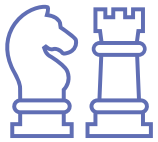
The Team Dance Steps



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.

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The Team Dance: *Midway Knock*

At this point:

1. Provider gives instructions of what they need: Lab drawn, flu shot, referral, help with procedure, follow up appointment, etc…
2. MA may do a second Midway knock if needed or requested.

Midway Knock allows MA to get things done synchronously while provider finishes up visit versus waiting until the end to begin working on these tasks for this patient.

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Midway Knock

- For a virtual visit, the MA and provider can decide how they would like that "knock" to take place. Perhaps it is a chat feature in the Electronic Medical Record (EMR) or a chat feature in the web platform

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Different Ways to "Knock"

- Exam Room Door
- Walkie Talkie
- Chat through the EMR or other software

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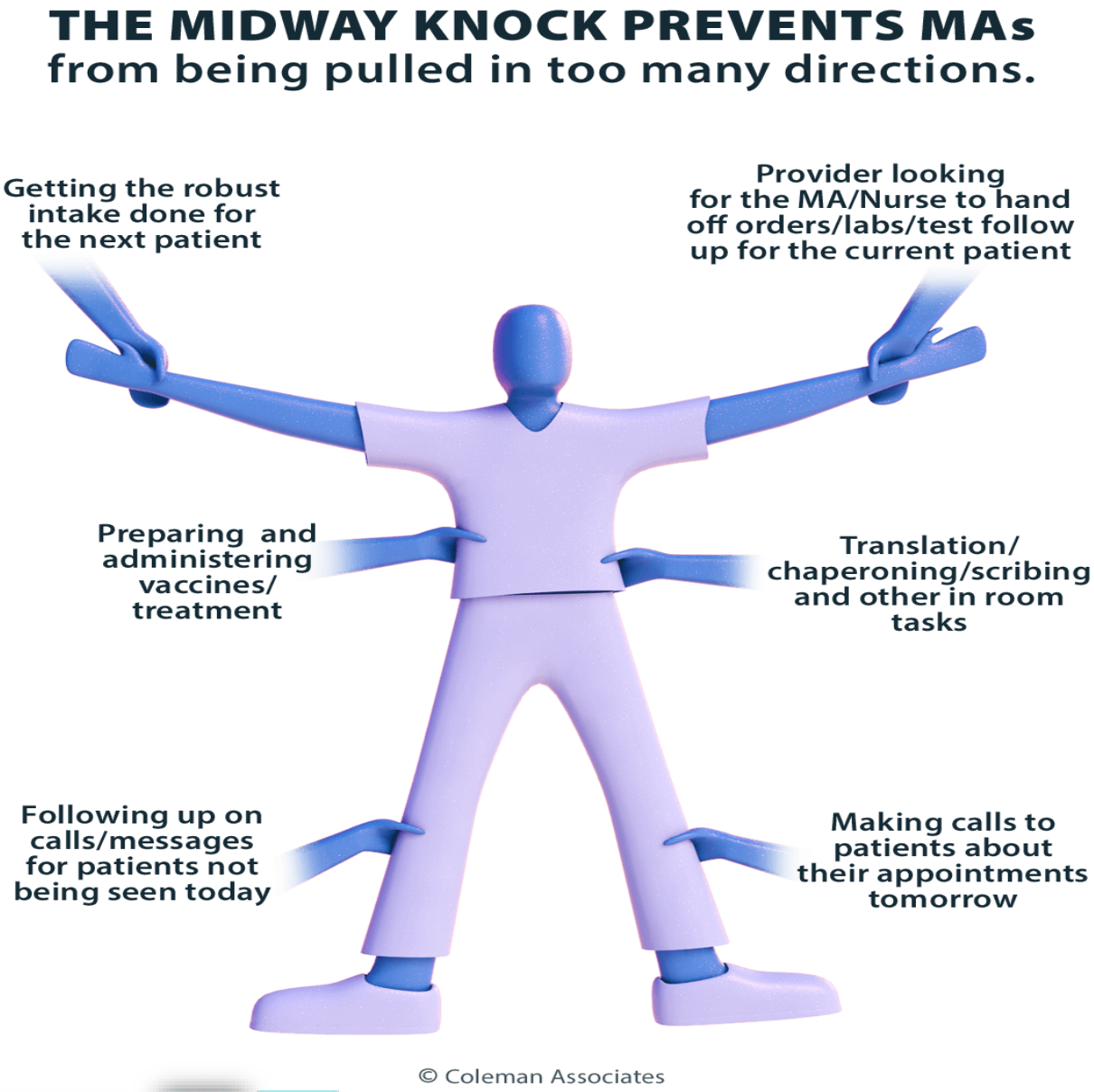
Midway Knock



- Keep the provider from having to "hunt" for their MA.
- MAs keep the provider on track and offer to provide support as well as a gentle reminder of time passed.

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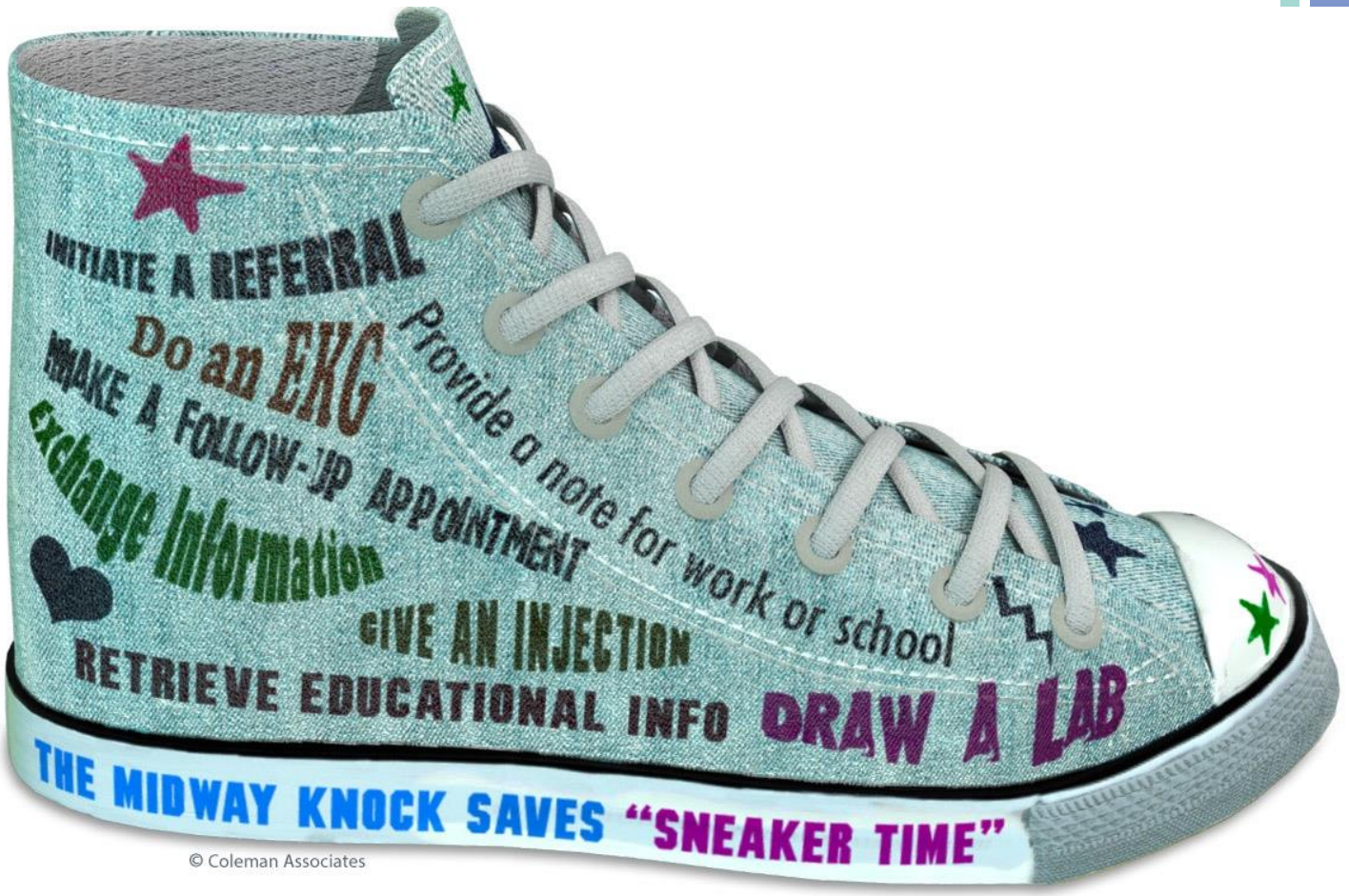
Possible Midway Activities



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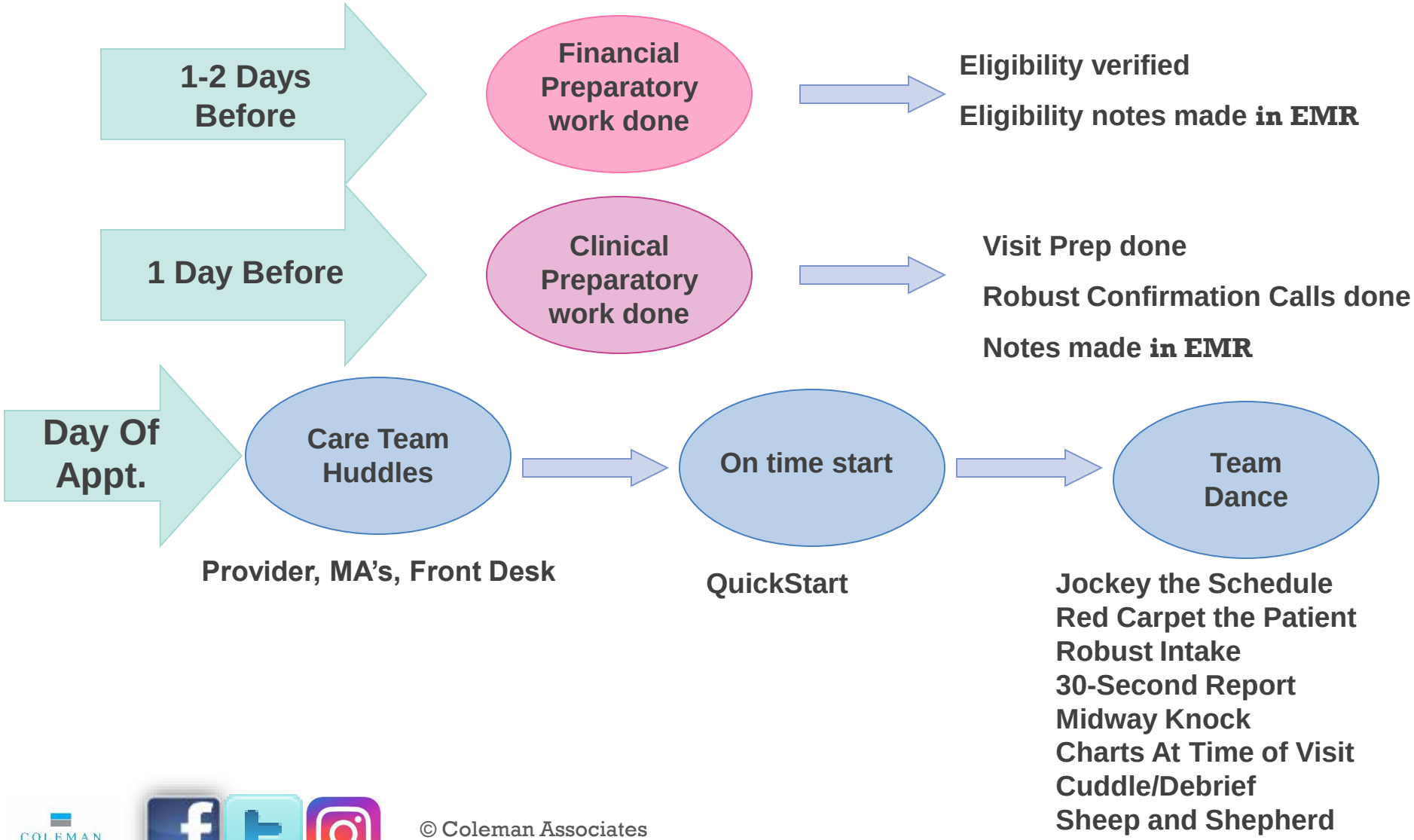
Your New Visit Model



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Today's Takeaways

Midway Knock

Communicating with Staff

Communicating with Patients

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Consistent, Clear, Accurate messaging is one of your most powerful tools.

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Confusion Creates…

Fear

Anger

Paralysis

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Letter to Staff

Dear [Insert Organization Name] Employees,

We want to thank you for your continued service to our patients and our communities through this trying time. We hope that you and your family are feeling healthy and well. As Michigan begins to reopen, we are writing to share what steps we are taking to keep you and patients safe in our new normal.

[Insert Organization Name] is using the current CDC guidelines and the guidelines from our state health department to guide our response. In addition to our regular cleaning schedule, we are taking the following steps to keep you safe:

- We are screening patients over the phone before they come for their appointments.
- We are screening all staff and patients that enter the facility for fever and symptoms of COVID-19. Staff responsible for screening will wear full PPE.
- Patients are being asked to come alone to their appointments or bring one caregiver when necessary.
- We have installed additional hand sanitizer dispensers.
- We are cleaning bathrooms every two hours.
- We are dividing the clinic into "sick" and "well" sides to control cross-contamination.
- Patients will be asked to wait in their cars whenever possible and the chairs in the waiting room have been spaced out to accommodate social distancing.
- We have installed barriers at the front desk to separate staff members and patients.
- We have removed all toys, reading materials, remote controls and other communal objects from the clinic.

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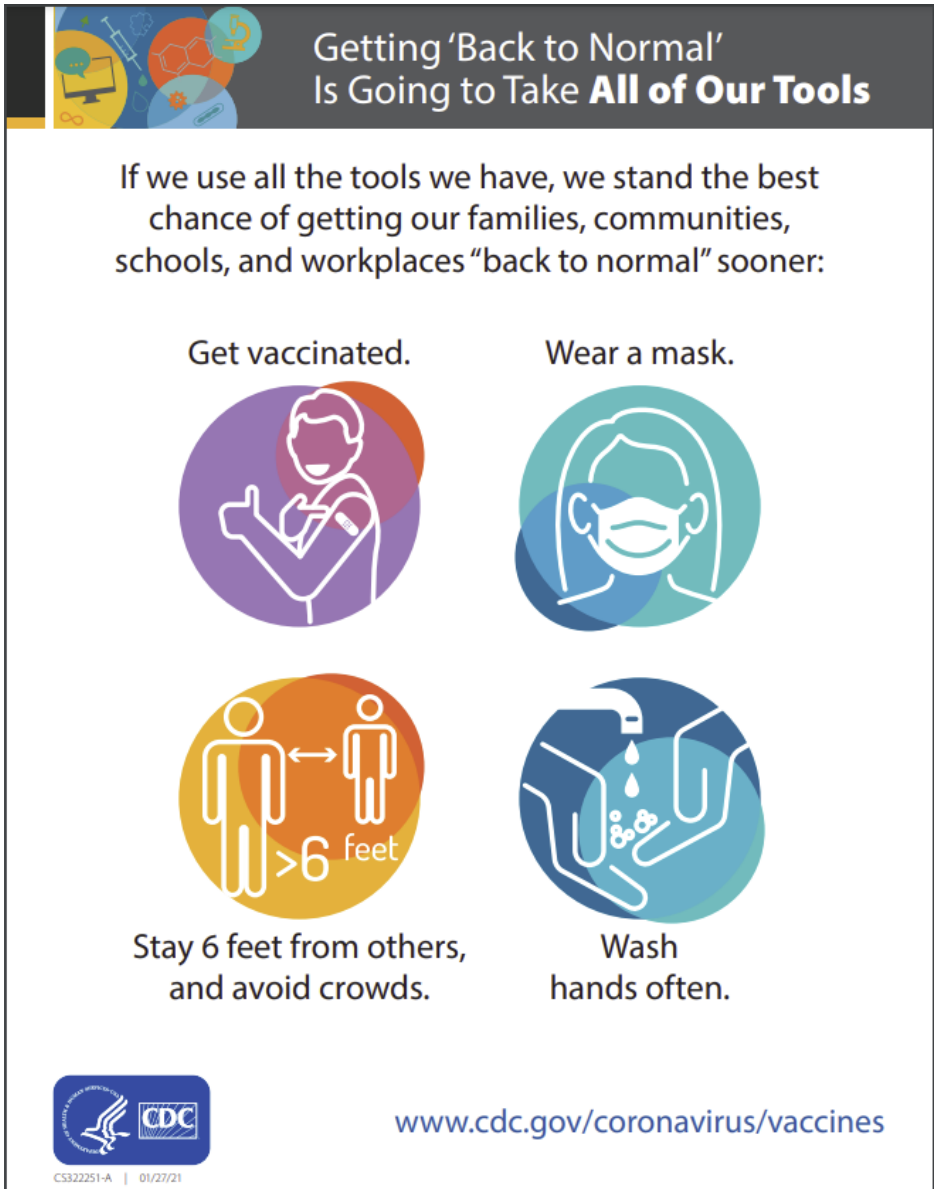
Clinic Signage



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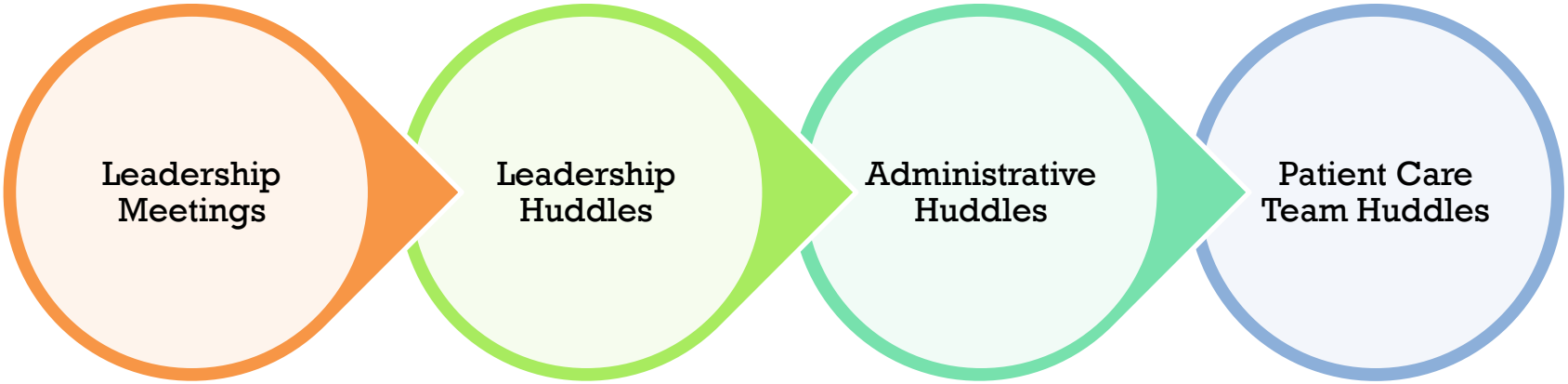
Structuring Staff Communication



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Leadership Meetings

- Leadership meetings should happen at least once per week.
- Can be separated into exec team and full leadership team.
- Discuss the most pressing issues.
- Decide on key messages for all staff about the most important issues.

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Leadership Huddles

- 3-5 times per week. More frequent during emergencies, such as the coronavirus pandemic.
- No more than 15 minutes.
- All leadership.
- Report out on the most important issues and the organization's response.
- Review and update key messages.

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Administrative Huddles

- Daily before Patient Care Team Huddles.
- All clinic staff.
- No more than 5 minutes.
- Review key messages.
- Review operational information such as staff outages.

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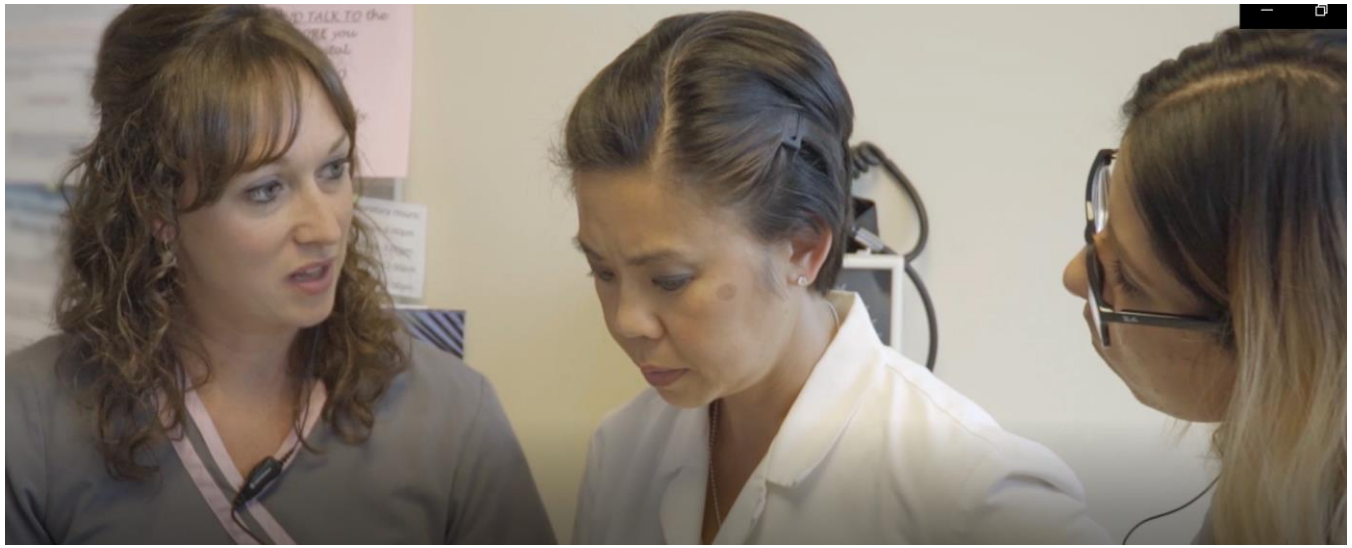
Patient Care Team Huddles

- 1-2 times per day
- Patient Care Team
- 10-15 minutes
- Review the patients on the schedule for that session
- Don't throw out your good processes just because you are virtual



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Don't fall back into the email trap…

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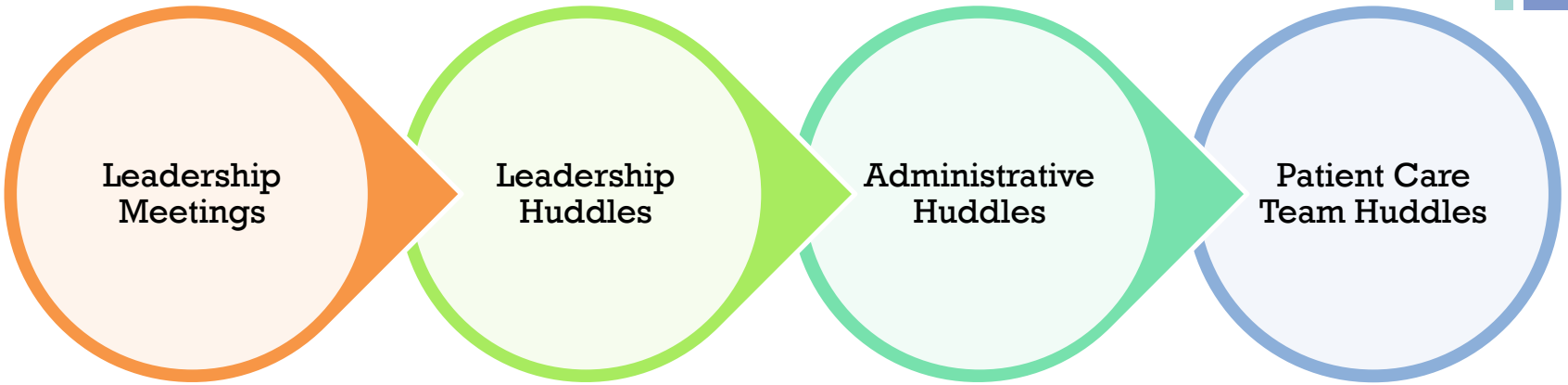
Structuring Communication



Everyone in the organization receives the same key messages in a timely manner.

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Sample Schedule for Communication

Time	Monday	Tuesday	Wednesday	Thursday	Friday
7:45 am-7:59 am	Leadership Huddle	Leadership Huddle	Leadership Huddle	Leadership Huddle	Leadership Huddle
8:00 am-8:05 am	Administrative Huddle	Administrative Huddle	Administrative Huddle	Administrative Huddle	Administrative Huddle
8:06 am-8:15 am	Patient Care Team Huddle	Patient Care Team Huddle	Patient Care Team Huddle	Patient Care Team Huddle	Patient Care Team Huddle
3:00 pm-5:00 pm	Leadership Meeting				

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Today's Takeaways

Midway Knock

Communicating with Staff

Communicating with Patients

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Letter to Patients

Dear Patients of [Insert Organization's Name],

We hope you are doing well and feeling healthy. We are writing to let you know that as your primary care provider we are still here and are opening up our doors for increased access to care over the next couple of weeks. As always, our commitment is to you and our community. We are here to keep you healthy and safe.

Below we have included some information that could help you should you or any family need our services. We still encourage all of our patients to follow CDC guidelines when it comes to social distancing, hand-washing, and protecting vulnerable populations who are particularly prone to COVID-19.

1. We are OPEN for both in-person and telehealth visits. Our current hours are [Insert Hours] If necessary, include any changes to normal business hours here as a standout or if you are canceling preventative visits at this time. Any changes to our hours will be posted here [Insert link to updated hours].
2. We are following the current recommendations of the CDC and Michigan Department of Health and Human Services.
3. As always, the best way to reach us is by phone or email. Please don't walk-in. You can reach us to make an appointment by calling [insert phone number]. Our phones are open from _____ a.m. to _____ p.m. Monday- Saturday.
4. Did you know that another way to reach us is through our Patient Portal? [insert link here]. You can get logged in by going here [insert instructions].

Here are a few screening questions we will ask you the day before your appointment:

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Scripts for Patient Phone Calls

"Good Afternoon, [Insert Organization's Name]. May I help you?"

If the Patient says they may need an appointment, "Great, I can help you with that. We wanted to let you know that we have been adjusting our workflows to make sure we are doing everything we can to keep the community safe at this stage in the COVID-19 response. I'll explain more about those changes. First, let's get you what you need. What would you like to see the provider for?"

> *If the patient wants to be seen but isn't sure about telehealth or in-person, refer to the organization's guide for good telehealth visit candidates. [Insert link here.]*

Document reason for the visit and schedule the patient in their chosen slot for telehealth or in-person visit. "Great, we can get you scheduled for that. Does _____ (day), _____(date) and _____ (time) work ok for you?

"We wanted to let you know we are screening all of our patients before their appointment, is it ok if I ask you some questions?"

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In-Office Visit: Explain the New Process

- Review the organization's process for in-office visits with the patient.
  - What can they expect when they arrive?
  - What will they be asked to wear?
  - What does social distancing look like?
  - Will they be asked to wait in the car?
  - What happens if they have a fever?

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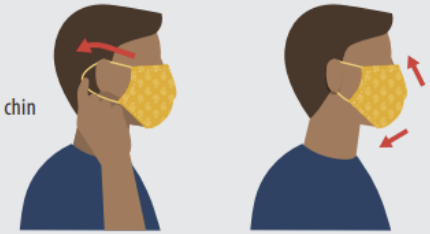
Clinic Signage

How to Safely Wear and Take Off a Mask

Accessible: https://www.cdc.gov/coronavirus/2019-ncov/prevent-getting-sick/diy-cloth-face-coverings.html

WEAR YOUR MASK CORRECTLY

- Wash your hands before putting on your mask
- Put it over your nose and mouth and secure it under your chin
- Try to fit it snugly against the sides of your face
- Make sure you can breathe easily
- Do not place a mask on a child younger than 2



USE A MASK TO HELP PROTECT OTHERS

- Wear a mask over your nose and mouth to help prevent getting and spreading COVID-19
- Wear a mask in public settings when around people who don't live in your household, especially when indoors and when it may be difficult for you to stay six feet apart from people who don't live with you
- Don't put the mask around your neck or up on your forehead
- Don't touch the mask, and, if you do, wash your hands or use hand sanitizer

FOLLOW EVERYDAY HEALTH HABITS

- Stay at least 6 feet away from others
- Avoid contact with people who are sick
- Avoid crowds and places with poor ventilation
- Wash your hands often

TAKE OFF YOUR MASK CAREFULLY, WHEN YOU'RE HOME

- Untie the strings behind your head or stretch the ear loops
- Handle only by the ear loops or ties
- Fold outside corners together
- Place mask in the washing machine
- Wash your hands with soap and water

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https://www.cdc.gov/coronavirus/2019-ncov/symptoms-testing/symptoms.html

Symptoms of Coronavirus (COVID-19)

Know the symptoms of COVID-19, which can include the following:

Symptoms can range from mild to severe illness, and appear 2–14 days after you are exposed to the virus that causes COVID-19.

Seek medical care immediately if someone has Emergency Warning Signs of COVID-19

- Trouble breathing
- Persistent pain or pressure in the chest
- New confusion
- Inability to wake or stay awake
- Pale, gray, or blue-colored skin, lips, or nail beds, depending on skin tone

This list is not all possible symptoms. Please call your healthcare provider for any other symptoms that are severe or concerning to you.

Centers for Disease Control and Prevention
National Center for Emerging and Zoonotic Infectious Diseases

cdc.gov/coronavirus

CS-317142-A

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https://espanol.cdc.gov/coronavirus/2019-ncov/symptoms-testing/symptoms.html

Síntomas del coronavirus (COVID-19)

Conozca los síntomas del COVID-19, que pueden incluir:

Los síntomas pueden ser de leves a graves, y aparecer de 2 a 14 días después de la exposición al virus que causa el COVID-19.

Busque atención médica de inmediato si alguien tiene signos de advertencia de una emergencia del COVID-19

- Dificultad para respirar
- Dolor o presión persistentes en el pecho
- Estado de confusión de aparición reciente
- No puede despertarse o permanecer despierta
- Color pálido, gris o azulado de la piel, los labios, o el lecho de las uñas, dependiendo del tono de piel

Esta lista no incluye todos los síntomas posibles. Llame a su proveedor de atención médica si tiene cualquier otro síntoma que sea grave o que le preocupe.

Centers for Disease Control and Prevention
National Center for Emerging and Zoonotic Infectious Diseases

cdc.gov/coronavirus-es

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أعراض مرض فيروس كورونا (كوفيد-19)

تعرّف على أعراض كوفيد- 19، والتي تشمل ما يلي:

قد تتراوح الأعراض من خفيفة إلى شديدة وتظهر بعد يومين إلى 14 يومًا من تعرضك للفيروس الذي يسبب كوفيد-19.

اطلب الرعاية الطبية فورًا إذا ظهرت على أي شخص العلامات التحذيرية الطارئة لمرض كوفيد- 19

- صعوبة التنفس
- ألم أو ضغط مستمر في الصدر
- ارتباك جديد
- عدم القدرة على الاستيقاظ أو البقاء مستيقظًا
- جلد، أو شفاه، أو فراش أظافر شاحبة أو رمادية أو زرقاء اللون حسب لون البشرة

هذه القائمة لا تشمل كل الأعراض المحتملة. يُرجى الاتصال بمقدم الرعاية الصحية المتابع لك في حالة ظهور أي أعراض أخرى شديدة أو مثيرة للقلق.

cdc.gov/coronavirus

Centers for Disease Control and Prevention
National Center for Emerging and Zoonotic Infectious Diseases

CS-317142-I

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APPENDIX A

COVID-19 Vaccine **Communication and Confidence Checklist**

Use this checklist to promote COVID-19 vaccine confidence among your healthcare personnel.

		Activity
1	☐	Give COVID-19 vaccine communication and confidence basics presentation to healthcare personnel. **CDC Resources:** ▪ Building Confidence in COVID-19 Vaccines Among Your Patients: Tips for the Healthcare Team (*PowerPoint*) ▪ How to Build Healthcare Personnel's Confidence in COVID-19 Vaccines (*Guide*)
2	☐	Hold an initial discussion with 8–10 staff to identify strategies for making vaccine confidence visible. **CDC Resource:** COVID-19 Vaccine Confidence Conversation Starter (*Guide*)
3	☐	Provide training and education ☐ Educate all staff about COVID-19 vaccine. ☐ Train healthcare teams about the vaccines, how to build vaccine confidence, and how to have effective conversations about vaccines with patients. **CDC Resources:** ▪ COVID-19 Vaccine Basics: What Healthcare Personnel Need to Know (*Flyer*) ▪ Building Confidence in COVID-19 Vaccines Among Your Patients: Tips for the Healthcare Team (*Flyer*) ▪ Quick Answers to Common Questions People May Ask about COVID-19 Vaccines: Tips for Healthcare Professionals (*Flyer*)
4	☐	Post COVID-19 vaccine educational materials in staff break rooms and common areas in your health facility (*posters, handouts, FAQs*).
5	☐	Post COVID-19 vaccine information blogs and/or articles on your website, intranet, and social media platforms (*blog posts, social media, videos*).
6	☐	Create and publicize a feedback mechanism for staff members to ask questions or receive guidance about COVID-19 vaccination (*email inbox, phone number, point of contact*).
7	☐	Share regular staff updates on COVID-19 vaccination efforts (*staff meetings, email blasts*).
8	☐	Communicate where, when, and how healthcare personnel will be offered the vaccine. Share any plans to support personnel needing time away from clinical care if they are experiencing any expected post-vaccine side effects (*posters and flyers in break rooms, staff meetings, email blasts*).
9	☐	Have conversations with staff about the vaccines, and use strategies identified during staff discussions to make vaccine confidence visible in your facility. **CDC Resource:** ▪ COVID-19 Vaccine Confidence Conversation
10	☐	Share testimonials from healthcare personnel who volunteer to speak about why they got vaccinated and promote among staff, such as on the intranet or internet, in staff meetings, and on social media (*social media, blog posts*).
11	☐	Recognize healthcare personnel who have been effective vaccine confidence boosters (*staff meetings, email blasts, social media, blog post*).

www.cdc.gov/coronavirus/vaccines

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Patient Handouts

How our facility is keeping patients safe from COVID-19

Our facility is prepared for the possible arrival of patients with coronavirus disease 2019 (COVID-19). We are committed to keeping patients safe and are taking the following steps to reduce the risk of COVID-19 in our patients and staff:

We are providing extra training for staff and education for patients about the importance of hand hygiene, face masks, respiratory hygiene and cough etiquette.

Tissues, alcohol-based hand sanitizer, and trashcans will be provided in the waiting area and treatment area. Soap and water will continue to be available at all hand-washing sinks and in the restrooms.

We are monitoring patients and families for symptoms of COVID-19.

Call ahead if you have fever, new cough, sore throat, tiredness, muscle aches or shortness of breath. This allows us to connect you with appropriate care ahead of your arrival.

Call us at [Insert Phone Number]

We are prepared to quickly identify and separate patients and families with symptoms of COVID-19.

All patients and visitors will be screened upon entry to the facility and instructed to continue wearing their cloth face covering (or offered a face mask, if available.

We are training staff about proper use of personal protective equipment for COVID-19.

You may see a change in the personal protective equipment (i.e. gowns, masks, gloves) that staff are asked to wear.

We are monitoring all staff for symptoms of COVID-19.

We are instructing staff who have symptoms of COVID-19 (e.g., fever, cough, shortness of breath, sore throat, muscle aches, tiredness) to stay home and not come to work.

We are continuing our routine cleaning and disinfection procedures as these procedures are recommended for protecting patients from COVID-19 in health centers.

Any surface, supplies, or equipment located within the patient area will continue to be disinfected or discarded between patients.

We are limiting staff and visitors coming into the facility.

We are limiting non-essential staff entry into the facility by exploring ways to provide care to patients remotely and allowing some staff to work remotely.
We are restricting visitor access to only those who are essential for the patient's care. Visitors will be screened for fever and symptoms of COVID-19 prior to entry. Visitors will be asked to wear their cloth face covering and limit their movement in the facility.

We are encouraging patients and staff to share all questions and concerns related to COVID-19. .

Don't be afraid to use your voice. It is okay to ask staff questions about treatment changes and ways to protect yourself and your family

[Insert Logo]

For more information, visit our website at [insert website].

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Leveraging Community Partners

- List the organizations as community partners and resources on each other's websites
- Create joint Social Media posts
- Send a staff member, such as an MA, to outreach patients at the Community Partners' location
- Create a list of Community Partners for staff to share with patients

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Potential Community Partners

- Food banks
- Domestic Violence Shelters
- Homeless Shelters
- Unemployment Offices
- Senior Centers
- Meals on Wheels
- Schools
- Hospitals
- Etc.

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Sample Email for Community Partners

Dear [Insert Organization Name],

My name is [insert name] and I work at [insert organization name]. As you know, the COVID-19 crisis has hurt individuals and families in our community. I was hoping that we could connect to talk about how we can work together to serve our community better. I would love to learn about the work you are doing, and I can share how our organization can help. [I attached a flyer about the services we can provide below.]

Thank you for your time,

[Insert name]

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Today's Takeaways

Midway Knock

Communicating with Staff

Communicating with Patients

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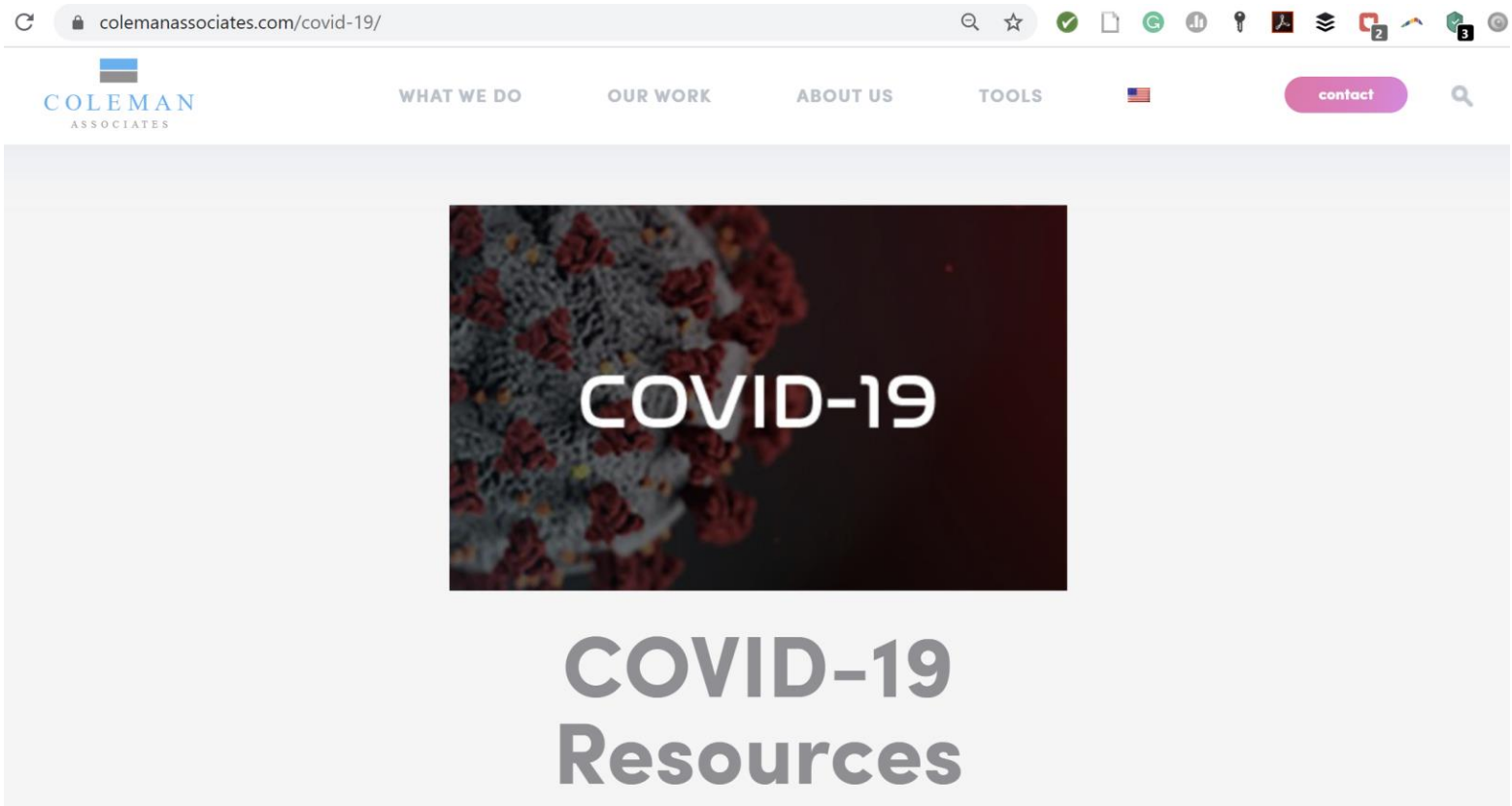
More Resources Are Available



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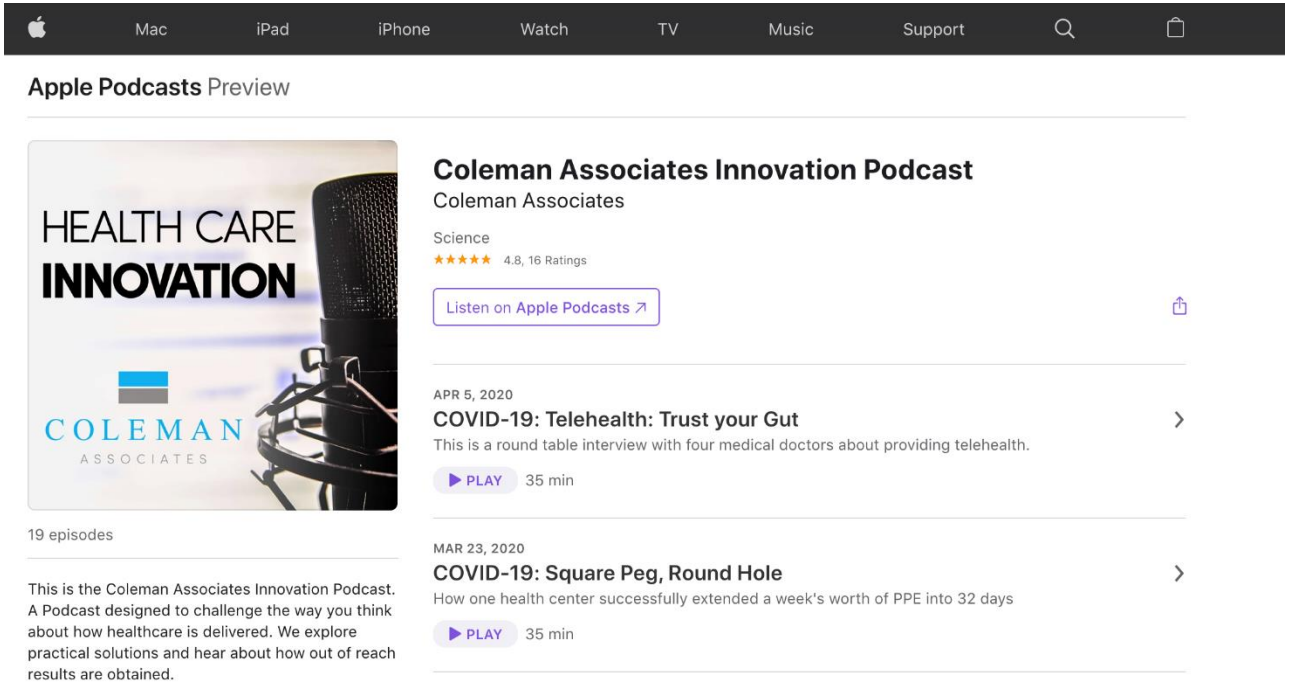
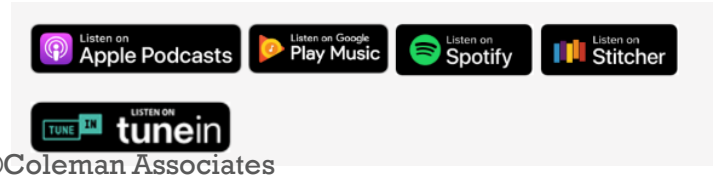
Coleman Associates Innovation Podcast Instructions

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





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