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 technical support
(+1.888.799.9666 ext. 2)
• 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:

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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  
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Dr. Michelle Warren  
Family Physician, AMA President-Elect

AMA Staff
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
Clinic

Panel

Clinic

PCN

Zone

ALBERTA MEDICAL ASSOCIATION
Zone

Panel

Clinic

PCN

Zone
Approach to Panel Management

- **KNOW YOUR PANEL**
- **PROVIDE ACCESS & CONTINUITY OF CARE TO YOUR PANEL**
- **MANAGE YOUR PANEL**
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

Panel

Patients with Financial Strain

Patients with Complexity
(COPD, Db, mental health, etc.)
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
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
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
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

COVID +

ATTACH

Patient’s Medical Home

Primary Care COVID Pathway

social services
mental health
income support
food security etc.

All patients
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

Stakeholders: Communicate Regularly

Patient’s Medical Home
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
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)

- Indigenous
- Mental Health
- Attached
- Complex
- Vulnerable
- Unattached
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.
Upcoming Webinars & Resources

- Deeper dive into patient care processes for community specialist clinics
  
  8\textsuperscript{th} May 2020

- Stay tuned for future opportunities
  
  actt.albertadoctors.org/cii-cpar
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