

## Primary Care's Relaunch - Practical Approaches for the "New Normal"

#### Welcome! Thank you for joining early

**Start Time: 12:00 PM promptly** 

- Your mic and camera are disabled by default
- 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'

# Primary Care's Relaunch: Practical Approaches for the "New Normal"

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:
(Use the link in the chat)
https://support.zoom.us/hc/
en-us/categories/201137166

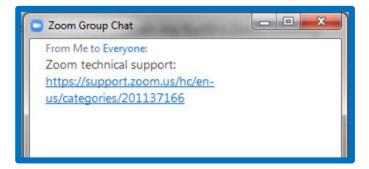
## Primary Care's Relaunch: Practical Approaches for the "New Normal"

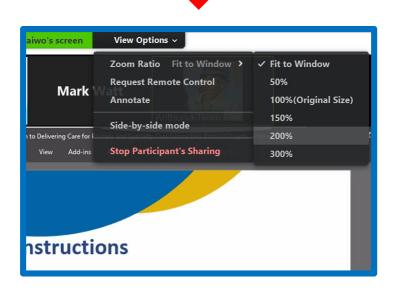
May 22, 2020

#### **Zoom Instructions**



## **Zoom technical support:** (Use the link in the chat)





## **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.

#### **Welcome:**

**Dr. Christine Molnar** Radiologist, AMA President

#### **Presenters:**

Dr. Brad Bahler

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

**Dr. Janet Craig** 

Family Physician, AMA Physician Champion (Edmonton Zone)

Dr. Michelle Warren

Family Physician, AMA President-Elect

#### **Session Moderator:**

#### **Sue Peters**

**AMA - Session Moderator** 

#### **Q/A Chat Moderators:**

#### **Sean Miles**

AMA - Live Q&A Moderator

#### **Jennifer Fernandes**

AHS, AIM Alberta - Speciality Access

#### **June Austin**

**AMA - Access Principles** 

#### **Michele Hannay**

**AMA - Access Principles** 

#### **Michelle Tobias-Pawl**

**AMA - Specialty Care** 

#### **Emily Johnston**

AMA - Health Service Reopening Schedule

#### **Caroline Garland**

AMA – Privacy & Virtual Care Technologies

#### **Norma Shipley**

AMA - Billing

#### **Barbra McCaffrey**

AMA - EMR, CII/CPAR



#### **Presenter Disclosure**



- Dr. Brad Bahler: AMA-Physician Contractor; Grant: CIHR Grant
- Dr. Janet Craig: Honoraria: UofA; Custom Learning Systems;
   Alberta AIM; AMA; Edmonton West PCN
- Dr. Michelle Warren: Honoraria: AMA; Associate Professor: UofA, UofC

#### **Moderator Disclosure**



- Sue Peters: AMA-contractor; IBI Group-contractor; HQCA
- Sean Miles: AMA-employee; ThinkFX Performance Group Inc.-director
- Jennifer Fernandes: AHS-employee
- June Austin: AMA-contractor; Vermont Oxford Networkcontractor; Alberta Innovates-contractor
- Michele Hannay: AMA-employee
- Michelle Tobias-Pawl: AMA-employee
- Emily Johnston: AMA-employee
- Caroline Garland: AMA-contractor
- Norma Shipley: AMA-employee; AHS-employee
- Barbra McCaffrey: AMA-contractor

## Welcome from AMA Board





#### **Session Overview**



- Welcome and Stage Setting Dr. Brad Bahler
- 4
- Dr. Janet Craig's Story
  - Panel Segmentation for Shaping Demand

- (3)
- Dr. Michelle Warren's Story
  - Innovations Sparked by COVID
  - Opportunities for Relaunch and Beyond
- Questions and Wrap-Up

## **Learning Objectives**



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

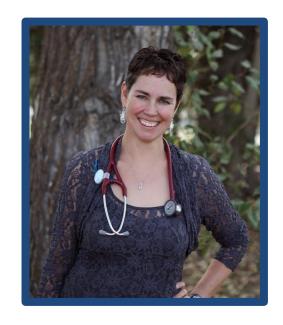
- Adapt and apply to context, strategies to maximize capacity for clinical care
- Apply panel management processes to identify and prepare for patients that require clinical care
- Describe how to optimize clinic and PCN team capacity to support access to continuity

## **Today's Presenters**









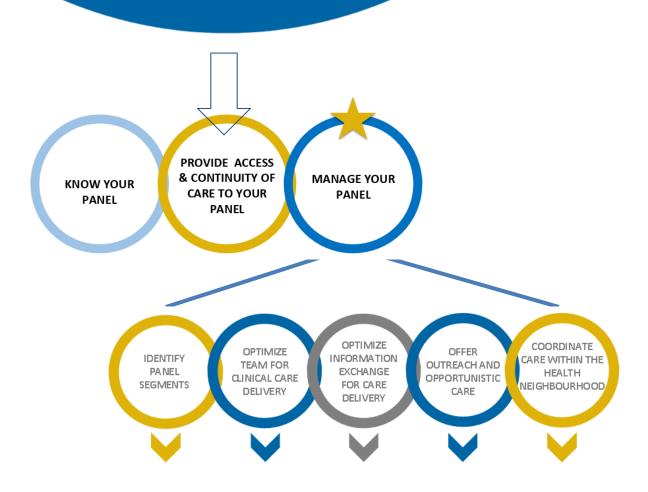
Dr. Brad Bahler
Family Physician,
ACTT Medical Director,
Alberta PCA Chair

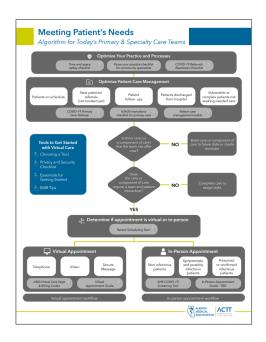
Dr. Janet Craig
Family Physician,
AMA Physician Champion
(Edmonton Zone)

Dr. Michelle Warren
Family Physician,
AMA President-Elect

## What We've Discussed:







Meeting Patients' Needs Algorithm

## Currently





## The 'New Normal'

**Decisions...** 



Safety

- Patient needs
- Virtual care
- Panel management
- Team optimization
- Access for appointments



'Demand' for appointments

## **Making Decisions**



Advice from colleges, organizations & colleagues

Status of labs, DI & other services

**Options for care provision** 

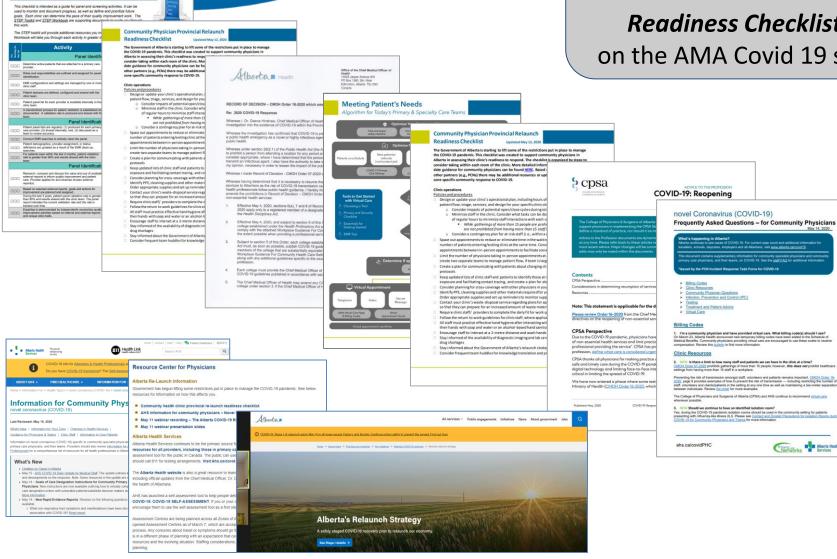
Safety advice from health officials

Prescriptions, referrals, care pathways



## **Supports & Information**

Supportive Tools for Every Panel (STEP) Checklist



Check out the

Community Physician

Provincial Relaunch

Readiness Checklist

on the AMA Covid 19 site

## **Finding the Balance**



## **SUPPLY**

- Appointments
- Virtual care
- Team







## **Dr. Janet Craig**

Family Physician, AMA Physician Champion (Edmonton Zone)

#### **Current State**



## Prior to COVID-19



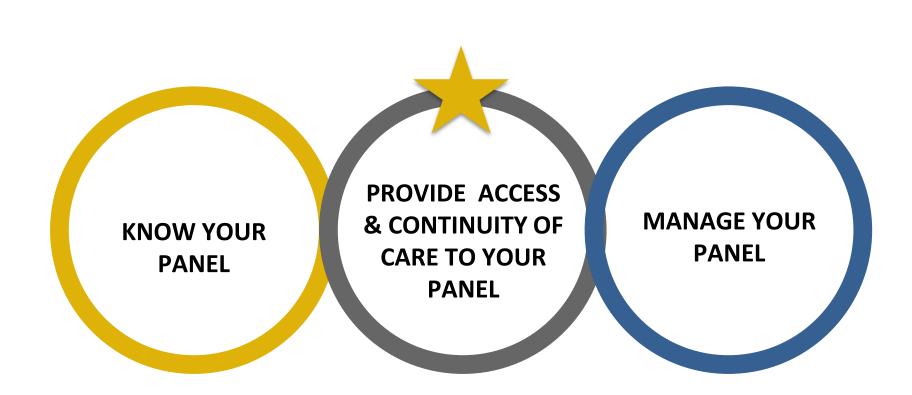
#### Current State

- 4-5 physicians
- 6 staff
- 5-15 patients in waiting room
- 20 patients/hr through clinic
- Saw patients for any reason

- 3 physicians
- 3 staff
- 0 patients in waiting room
- 3 patients/hr max through clinic
- See patients for priority concerns

# Approach to Panel Management





# Considerations for the 'New Normal'



## **Shaping 'Demand'**



Panel Management



Leveraging Team



Virtual Care



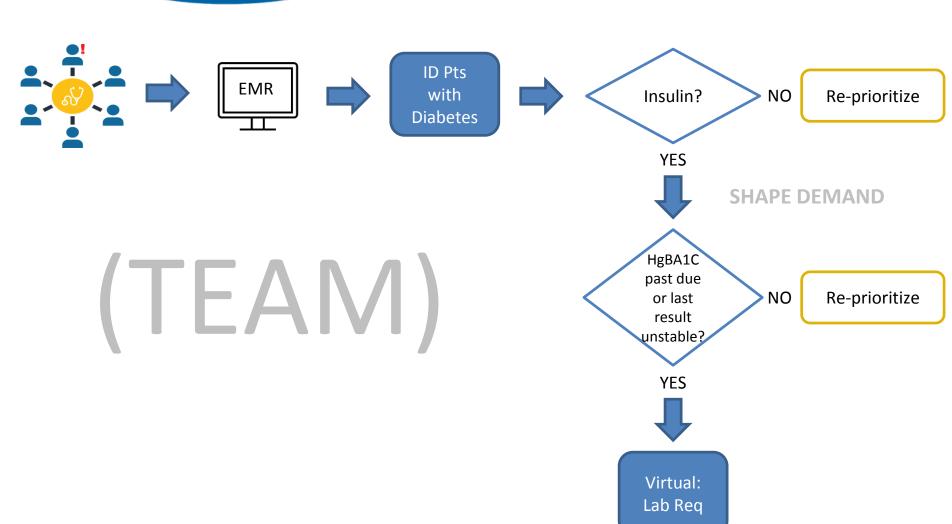
Safety (patients & team)







Panel Management Leveraging Team



## **EMR Integrated Tools**





#### QHR Notes:

- Medeo can be deple
- Lists can be easily ex Medeo - can send i
- was previously shan Cliniconex - Accuro
- Accuro patient mes
- Accuro Mobile: link
- Accuro Patient Mes Accuro Video: Link
- Accuro Patient form Accuro Online book

#### Microquest Notes

- HQ patient portal-
- Healthquest portal Healthquest - dowr
- the phone into the I
- Intake form capal
- dr2dr secure mes
- All tools (i.e. Patie developed and su

	. Health Myself . Chronometriq . CognisantMD	. Chronometriq . Cliniconex . CognisantMD		
TELUS Health Wolf	Via Wolf Patient Portal	Wolf Patient Portal via email Via TELUS Health Partner Program: . Cliniconex		

#### **TELUS Notes:**

- Mobile EMR works on desktops, tablet functionality that is available with the
- · TELUS EMR Mobile is not specific to a
- WOLF TELUS Virtual Visit should be lau For TELUS EMR virtual visit, the appoint
- notes that are documented by the pro of the chat feature are not stored in th
- · For TELUS EMR Virtual Visit, the patier
- · For TELUS Wolf patient portal and the new message is available for them in t · TELUS Wolf patient portal and the Hea
- configuration settings for managing th Health Myself patient portal offers sev
- patient messaging and broadcast notif the public facing website
- MedDialog is the TELUS solution for se MedDialog enabled providers can exch any MedDialog TELUS user can secure
- Wolf patient portal can be configured specific setting. With Health Myself po
- Cliniconex is a partner product availab notifications and bulk notifications.







#### **EMR Integrated Tools**

https://www.albertadoctors.org/leaders-partners/ehealth/virtual-care#tools

May 11, 2020

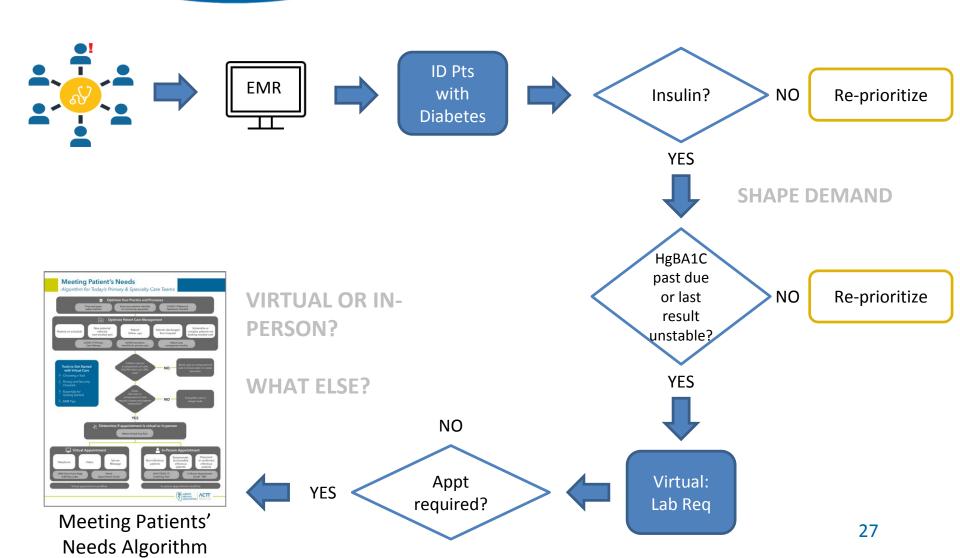
The following tools offer integration with common community EMRs and are known to be compliant with Alberta's privacy and security requirements. An asterisk beside the tool (\*) indicates that it can be used to stand alone outside of any EMR. For a more complete list of vendors, check out the Virtual Care Toolkit.

EMR Solution	On-line appointment booking	Appointment Reminders	Secure Patient Messaging	Patient Portal	Video Visits	Mobile EMR	Patient fillable forms (intake forms, surveys)	Broadcast messaging ability	Secure provider to provider messaging
Microquest/ Healthquest	Available, integrated with Healthquest EMR/HQO Clinic adds a link to online booking via the clinic website	Email, text or voice reminders with confirmations. Integrated with the EMR.	Available, integrated with Healthquest Accessible through clinic website	Available, integrated with Healthquest Accessible through clinic website	Will be integrated with Patient Portal. Available mid- May	Healthquest online (HQO) Download from the App store.	Intake form capabilities to send forms via email or text message link. Self check-in tool/kiosk available	Embedded	*dr2dr secure messaging Integrated with Healthquest
QHR/ Accuro	*Medeo integrated to Accuro schedule. Website link can be posted on clinic website or sent to patients	Appointment Confirmations powered by Cliniconex (integrated) s via Phone, email or text Appointment reminders can also be sent by secure message	*Medeo – (integrated) right click to send to patient, thread controlled by clinic, can be open or closed	Not yet Medeo account only to review past visits or anything clinic has sent the patient, like lab results	*Medeo	Accuro mobile is a light version of Accuro for viewing on smartphone or tablet The Citrix login can also be launched from phone/ iPad	Accuro forms and surveys powered by Ocean CognisantMD Forms can be sent via secure message and returned by patient via secure message	Yes, any query can be used to create a list of patients who can all be sent a secure message in blind copy	Currently in pilot as part of Healthmail (Electronic prescribing, Patient Messaging, Provider to Provider)
TELUS Health Med Access	Via TELUS Health Partner Program: . Health Myself . Chronometriq	Via TELUS Health Partner Program: . Health Myself . Chronometriq . Cliniconex	Via TELUS Health Partner Program: . Health Myself	Via TELUS Health Partner Program: . Health Myself	. TELUS EMR Virtual visit + chat Via TELUS Health Partner Program: . Health Myself	TELUS EMR Mobile	Via TELUS Health Partner Program: . Health Myself	Via TELUS Health Partner Program: . Health Myself	TELUS Health Med Dialog
TELUS Health PS Suite	Via TELUS Health Partner Program:	Via TELUS Health Partner Program: . Health Myself	Via TELUS Health Partner Program:	Health Myself Portal	. TELUS EMR Virtual visit + chat	TELUS EMR Mobile	Via TELUS Health	Via TELUS Health	TELUS Health Med Dialog



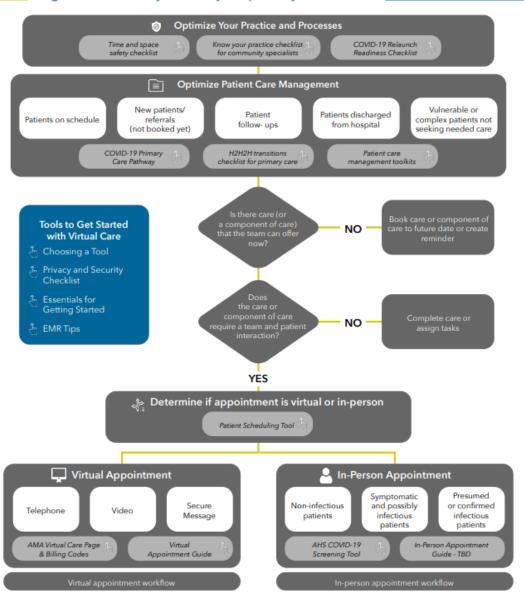






#### **Meeting Patient's Needs**

Algorithm for Today's Primary & Specialty Care Teams

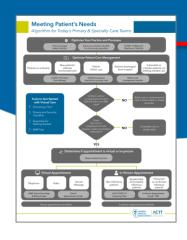


MEDICAL

ASSOCIATION Accelerating Change
Transferration Team



https://actt.albertadoctors.org/M PN-Algorithm







Organize Time and Space for Patient & Staff Safety

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'Organize Time and Space for Patient and Staff Safety' Tool

## Janet's Tips



- 1. If just starting, request and use your HQCA Panel Report to identify top chronic diagnoses, etc.
- 2. Consider watching (or asking team to watch) the other webinars in this series
- 3. Meet regularly with clinic team members to develop a clear plan for re-opening





## Dr. Michelle Warren

Family Physician, AMA President Elect (2020-21)

# Considerations for the 'New Normal'



## **Shaping 'Demand'**



Panel Management



Leveraging Team



Virtual Care



Safety (patients & team)

## Easing into the 'Surge'







Could this be managed with a phone call? Video?



"Stay home! We can care for you safely while you're home sick."



Virtual Care

We need to run on time!

## **Video Tips**



Video
Appointments...
What we've learned

- Macros to auto-populate EMR
- EMR templates to document



Virtual Care

How can we schedule for team safety?



Safety (patients & team)



#### In-person required?

Strategic Scheduling – 'Clean to Dirty'

If necessary, do our patients know when it's safe to come in?



## Clinic & PCN Team

- Avoid service duplication
- Efficient CDM

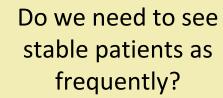


Leveraging Team How can we communicate as a team?

- EMR ('task' or 'messages')
- Huddles



Who should we be prioritizing?





Panel Management

Can we increase Rx intervals?

#### **Shaping Demand**



## Proposed schedule based on AJOG-MFM Guidelines

#### Traditional Approach = Approx. 13 in-person appointments



Every 4 weeks until 28 weeks = approx. 5 in-person appointments



Every 2 weeks until 36 weeks = 4 in-person appointments



Every 1 week until birth = approx. 4 in-person appointments

#### Our New Approach = Approx. 7 in-person appointments



Week 11-13 in person Week 16 virtual Week 20 in person



Week 26-28 in person Week 30 virtual Week 32 in person Week 34 virtual



Week 36 in person Week 37-38 either Week 39-41 in person

#### Capacity Created

Approx. 60 min of clinical care time created/patient (based on 20 min in-person & 15 min virtual care appointments)

Approx. 6.25 additional clinical care days created per year (based on caring for approx. 50 low risk prenatal patients)

## Michelle's Tips



- 1. It's not about being perfect try it and see what works
- 2. Your team is there to help how can the workload be shared?
- 3. Be creative this is an opportunity to think outside the box and do things differently

## **Brad's Tips**



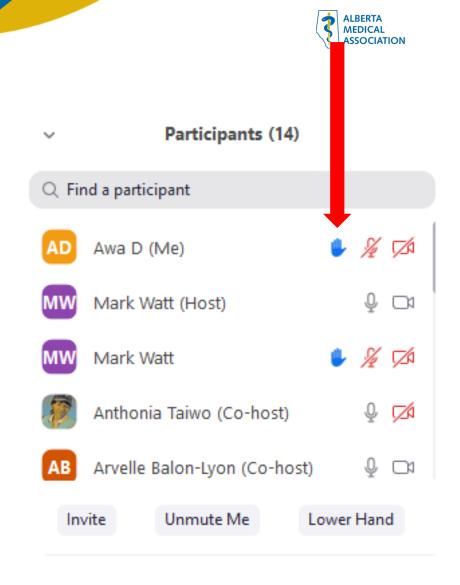
1. There's no cookbook – every patient & situation is unique

2. Making decisions is what we do; relaunch is no different

 Consider using the decision-making principles + key sources of information (email coming soon)

## **Live Q&A and Polling**

- 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



#### **Evaluation**



#### Please complete the post-session evaluation!

Click the Evaluation Link in the Chat

or

**Use the QR Code Below** 



#### **Podcast**





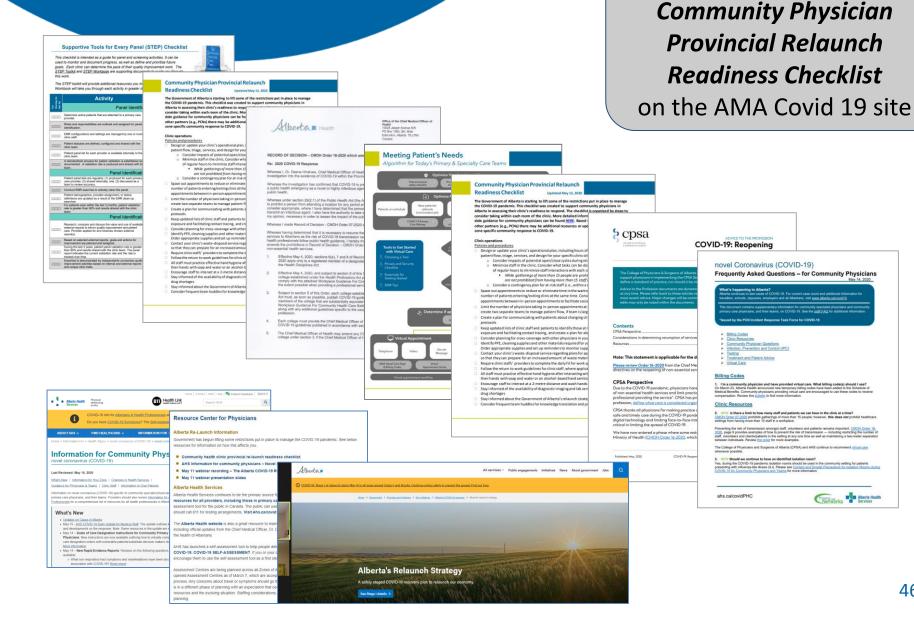
#### Available on:

- Apple Podcast
- Spotify
- Google Podcast
- Stitcher

#### Suggested episodes:

- 11 | Tips for Enhancing Access with Dr. Janet Craig
- 14 | Teamwork in the Time of COVID-19 with Dr. Rick Ward
- 15 | CII-CPAR: Part 1 with Dr. Heidi Fell
- 16 | CII-CPAR: Part 2 Stories from the Field

## **Supports & Information**



Check out the



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

#### **Evaluation**



## Click the Evaluation Link in the Chat or Use the QR Code Below

