

# The Power of Teams

Navigating Scopes of Practice in  
Health Care Teams

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**Primary Care  
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# Disclosure of Financial Support

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



# Mitigating Potential Bias

- Scientific Planning Committee

Contributed to the consideration of:

- learning needs
- the determination of learning objectives
- the development of program content
- choice of speakers or presenters

- No Sponsorship

No funds received

- Content Reviewed

The scientific planning committee has reviewed presentations and ensured it's evidence-based and free of undue influence.



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# Introductions

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# Presenter Disclosure

🌸 Presenter: **Dr. Lori Montgomery**

🌸 Relationships with financial sponsors:

- Grants/research support: Hotchkiss Brain Institute, Alberta Innovates, CIHR THINC Grant
- Speakers Bureau/Honoraria: none
- Consulting Fees: none
- Other: Alberta Health Services, Alberta Medical Association – Accelerating Change Transformation Team, University of Calgary, UBC, Alberta College of Family Physicians, PEIP by PEER, CBT Canada



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# Presenter Disclosure

🌸 Presenter: **Dr. Janet Craig**

🌸 Relationships with financial sponsors:

- Grants/research support: none
- Speakers Bureau/Honoraria: none
- Consulting Fees: none
- Other: Alberta Medical Association – Accelerating Change Transformation Team, Alberta College of Family Physicians, Health Quality Council of Alberta, University of Calgary



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🌸 Presenter: **Cheryl San Juan**

🌸 Relationships with financial sponsors:

- Grants/research support: none
- Speakers Bureau/Honoraria: none
- Consulting Fees: none
- Other: AMA-ACTT employee, University of Calgary



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# Learning Objectives

1

Participants will learn about the National Interprofessional Competency Framework and engage in exercises to explore scopes of practice within their unique settings.

2

Participants will explore barriers to implementing team-based care and learn how to address resistance

# How?

1

Participants will learn how to navigate scopes of practice within their unique settings

2

Participants will learn how to use validated tools to make teams more effective

Let's Talk

# Table Discussion

- What do you like about working in teams?
- What do you find challenging?

# Large Group Discussion

- What do you like about working in teams?
- What do you find challenging?

Multidisciplinary Care &  
Interprofessional Practice:

What's the difference?

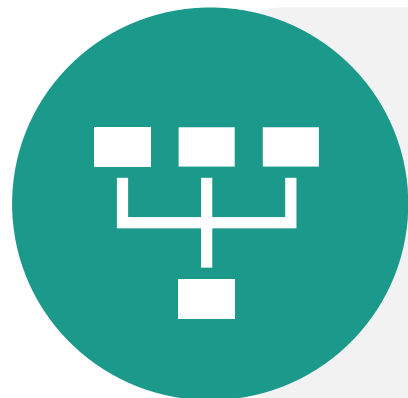
# Multidisciplinary Care



Team members from different disciplines working parallel to one another to treat clients



Members share information but do not necessarily share common understandings



The group does not generally follow formal processes

# Multidisciplinary Care



Usually an established leader



A clear definition of roles and responsibilities



Little overlap in care provided

# Interprofessional Practice

“An active and ongoing partnership between professionals from diverse backgrounds with distinctive professional cultures and possibly representing different organizations or sectors working together in providing services for the benefit of health care users.”

Morgan, Sonya J et al. “Observation of interprofessional collaborative practice in primary care teams: An integrative literature review.” *International journal of nursing studies* 52 7 (2015): 1217-30 .

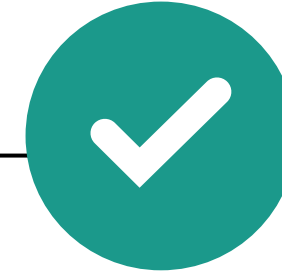
# Interprofessional Practice



Leadership is fluid



Scopes of practice overlap



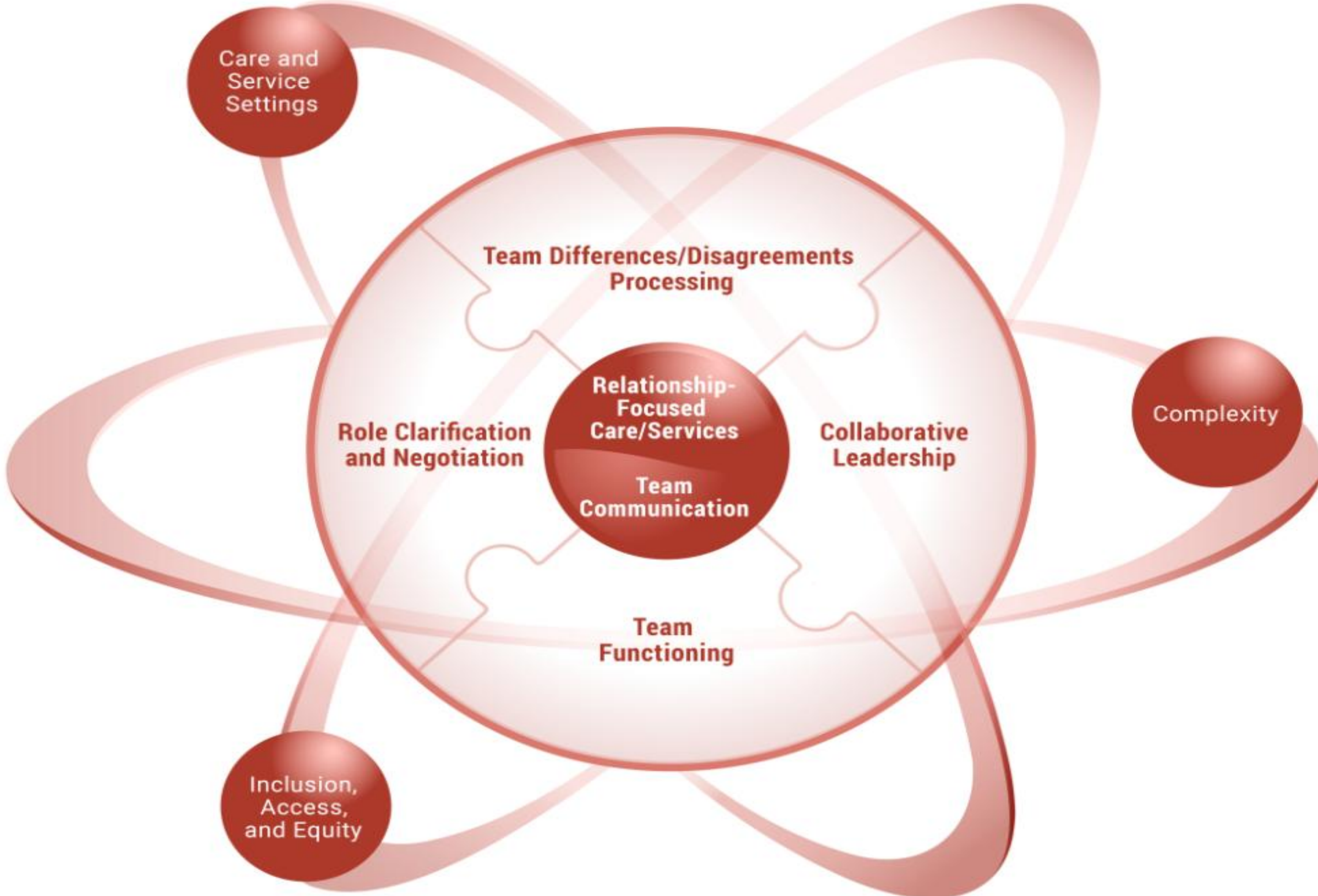
Members have a shared understanding and a shared goal

There is a role  
for both of these.



# Canadian Interprofessional Health Collaborative

CIHC  
Competency  
Framework for  
Advancing  
Collaboration



# CIHC Competency Framework



# Leading Change: Developing Role Clarity

# A Challenge for Teams...



“The lack of role clarity, lack of understanding of the boundaries between roles and poorly defined scope of practice can jeopardize teamwork.”

Kilpatrick et al. (2020) Systematic review of the characteristics of brief team interventions to clarify roles and improve functioning in healthcare teams

# Barriers to creating role clarity within teams



Transforming traditional physician-centred models of care



Low staffing resources



Limited time for training



Poor understanding of professional roles & scopes of practice



Overlapping scopes of practice amongst interdisciplinary team



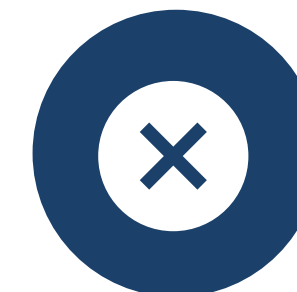
Lack of agreement about what core team members should do



Lack of trust and respect between team members



Threats to professional identities



People resist collaboration and try to assert authority

# Role Clarity

“Role clarity is associated with improved care coordination and professional autonomy balanced with interdependence.”

Ly, Sibbald, Verma, & Rucker (2018). Exploring role clarity in interorganizational spread and scale-up initiatives: the 'INSPIRED' COPD collaborative

# How to Create Role Clarity

## Roles & Responsibilities Assignments

<b>[Topic/Project name]</b> <b>Team Tasks</b>	<b>Who?</b>			
	<i>Could do it (in scope)</i>	<i>Has interest/ experience/ availability</i>	<b>RESPONSIBLE</b>	<b>CROSS TRAIN</b>
<b>QI and clinical tasks:</b>				
<i>Example: Regularly schedule QI team meetings</i>				
<i>Example: Generate a referral(s), if needed</i>				
<i>Example: Add a point of care reminder to patient's chart</i>				

# Let's Practice!

1

Based on job descriptions and scopes of practice, who on your team can do this task?

Examples: physician, medical office assistant, LPN, RN, social worker, clinic manager, referral coordinator etc.

2

Identify a QI or a clinical task

Examples: generating a referral, taking patient's vital signs, filling out a QI project charter etc.

3

Team member

Who on your team has interest/experience or capacity to do this task?

4

Decision point:

Who do you assign responsible for this task? Who will be cross trained?

Break  
15 minutes



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# Leading through Resistance:

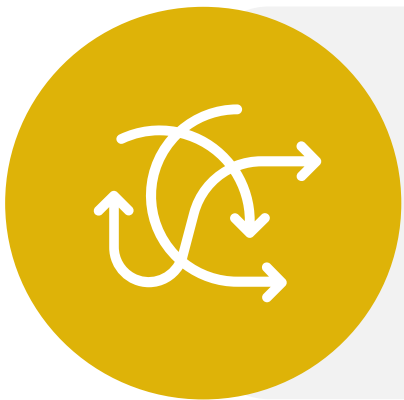
Practical Tools for Physicians and Teams

# Why is there resistance?



## Fear of increased medico-legal liability

Cited as a barrier to health professionals participating in collaborative care practices.



## Complexity

Implementation of effective teams is a complex undertaking with structural, procedural, and cultural dimensions.

Canadian Medical  
Protective  
Association  
(CMPA)

ACTT

According to the CMPA,  
collaborative care has  
many benefits:

- ✓ improves the distribution of workload
- ✓ reduces burnout
- ✓ boosts the quality of outcomes and patient experience

[www.cmpa-acpm.ca/en/education-events/good-practices/physician-team/collaborative-care](http://www.cmpa-acpm.ca/en/education-events/good-practices/physician-team/collaborative-care)

# Canadian Medical Protective Association

CMPA offers practice guidance, including:



Behaviours of effective and safe teams



The importance of scope of practice



Leading collaborative teams



Collaborative care: A medical liability perspective

# Collaborative Care

- “Healthcare professionals should understand and respect their own scope of practice and those of other team members.”
- “Scopes of practice can vary according to province or territory as well as from institution to institution and are continually evolving over time.”

# Alberta

	History	Physical Exam	Diagnosis	Ordering Tests	Prescribing	Facilitating Groups	CBT	Care Planning
Physician	✓	✓	✓	✓	✓	✓	✓	✓
Physician Assistant	✓	✓				✓	✓	✓
Registered Nurse	✓	✓		✓	✓	✓	✓	✓
NP	✓	✓	✓	✓	✓	✓	✓	✓
Pharmacist	✓	✓	✓	✓	✓	✓	✓	✓
Physiotherapist	✓	✓	✓	✓		✓	✓	✓
Occupational Therapist	✓	✓				✓	✓	✓
Social Worker	✓					✓	✓	✓
Psychologist	✓		✓	✓		✓	✓	✓

## Sidebar: Regulated Professionals

- healthcare, engineering, law, finance, education
- regulatory body issues licenses and monitors performance
- there is a defined scope of practice
- the professional carries liability for their own practice
- examples: physicians, nurses, pharmacists, physiotherapists

## Sidebar: Non-regulated Professionals

- training programs may be available, or may be provided on-the-job
- no licensing or monitoring of standards of practice (other than by employer)
- there is not a defined scope of practice
- scope of practice is delegated
- examples: care aids, physio assistants, kinesiotherapists

# Canadian Medical Protective Association

Tasks that fall within a physician's scope of practice may be delegated as appropriate to both regulated and unregulated team members

\*provided the physician is satisfied that the team member has the appropriate training and supervision.

Generally, tasks do not need to be delegated or supervised by a physician when that task is part of the scope of practice of another team member who will be completing the task.

\*If a physician does delegate or supervise where it is not required, they will assume responsibility for the delegation and for appropriately supervising the delegated task.

## Checklist: Collaborative care

Expand all

Working together to improve the quality of patient care

### Working well as a team

Individual team members are responsible and accountable for the care they provide to patients.

#### As a member of a well-functioning team, have you:

- Confirmed your role on the team?
- Understood the roles and responsibilities of individual team members, based on their scopes of practice and on each person's knowledge, skill, and ability?
- Clarify who is responsible for care delivery decisions?
- Communicated clearly and as often as necessary?
- Contributed to the creation and maintenance of a culture of psychological safety?
- Documented your care and the rationale for it clearly, to help others make good decisions and ensure continuity of care?
- Participated in continuous improvement processes to review team function and patient outcomes?

#### Each team member should be able to answer the following questions:

- What are the anticipated health outcomes for the patient?
- Am I ensuring the patient is an integral member of the team?
- How will the team manage expectations of patients and respond to their concerns?
- Is a quality improvement mechanism being used to monitor the functioning of the team and health outcomes?
- Is a policy and procedural framework in place to define and support the team?
- Does the team have sufficient resources to achieve the desired health outcomes?
- Who will coordinate care, manage the team, and ensure efficient and effective communication among team members and across teams?

# CMPPA: A Checklist for Success

- Take time to get to know each other as people and as professionals
- Make dedicated time and space for collaboration
- Be explicit about expectations, communication, roles and goals
- Understand a team will take time to mature and to be its best
- Define success and have a plan for continuous quality improvement

# Alberta's Health Professions Act (HPA)

## The Act:

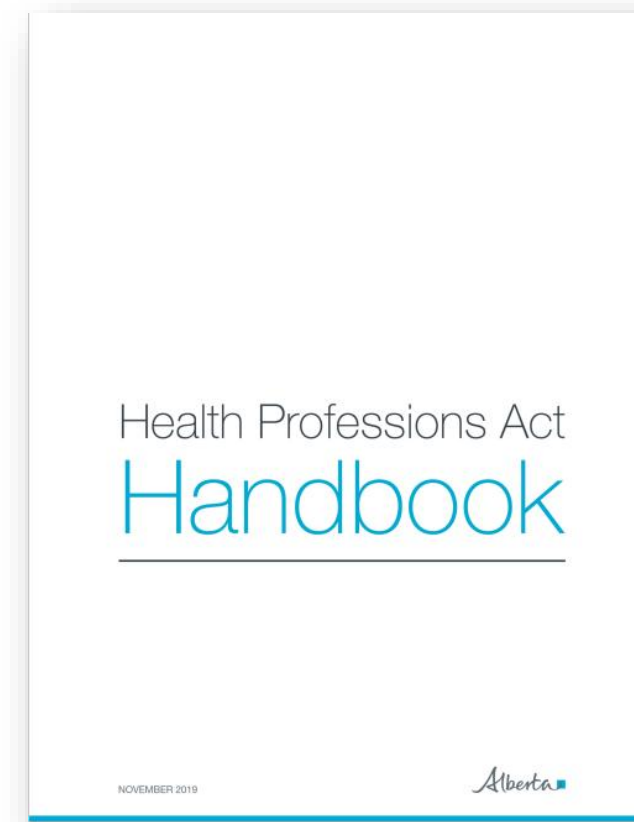
1

Governs the practice of regulated health professions

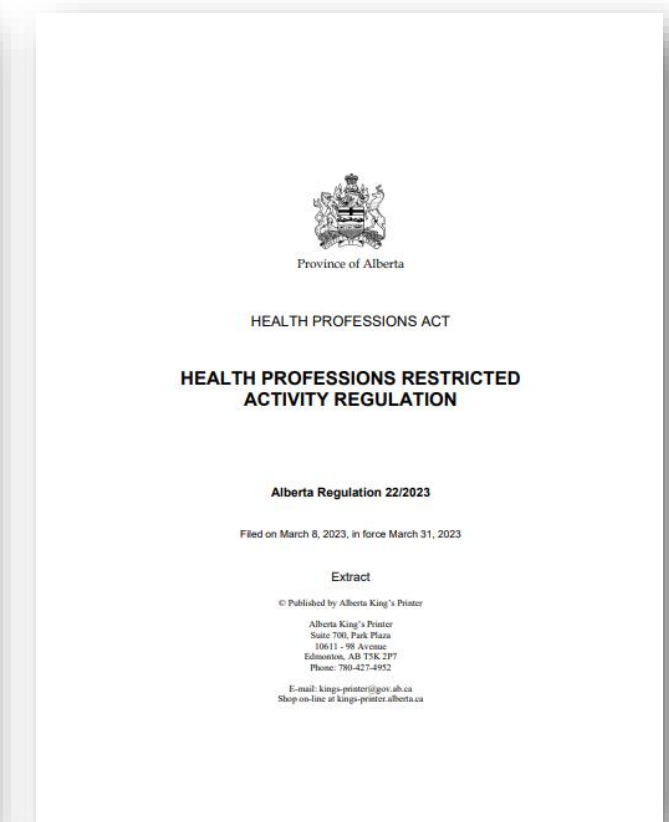
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Sets out standard processes for colleges for registration, continuing competence, complaints and discipline

## Useful Resources



HPA Handbook



Health Professions Restricted Activity Regulation

# Health Professions Act



The HPA was developed to regulate health professions in a way that allows for *non-exclusive, overlapping scopes of practice*.



Different professions may provide the same health services.

# Regulatory Colleges in Alberta

- 1) Acupuncturists
- 2) Audiologists
- 3) Chiropractors
- 4) Combined Laboratory and X-ray Technologists
- 5) Dental Assistants
- 6) Dental Hygienists
- 7) Dental Technologists
- 8) Dentists
- 9) Denturists
- 10) Dietitians
- 11) Hearing Aid Practitioners
- 12) Licensed Practical Nurses
- 13) Medical Diagnostic and Therapeutic Technologists
- 14) Medical Laboratory Technologists
- 15) Midwives
- 16) Naturopaths
- 17) Occupational Therapists
- 18) Opticians
- 19) Optometrists
- 20) Paramedics
- 21) Pharmacists
- 22) Pharmacy Technicians
- 23) Physiotherapists
- 24) Physicians, Surgeons, Osteopaths and Physician Assistants
- 25) Podiatrists
- 26) Psychiatric Nurses
- 27) Psychologists
- 28) Registered Nurses
- 29) Respiratory Therapists
- 30) Social Workers
- 31) Speech-Language Pathologists




# Wrap-up


# How to Create Role Clarity

## Roles & Responsibilities Assignments

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# Revisiting Role Clarity

-  After our discussion today, is there anything that surprised you?
-  Would you change anything?
-  Is there someone else who could do a task that you hadn't considered?



# PHYSICIAN LEADERSHIP NETWORK

Supporting leadership development, effective  
teambuilding and practice activities for  
Alberta doctors

Regular 60-minute online sessions | Variety of topics | Resources | Free





# ELECTRONIC MEDICAL RECORDS NETWORK

Supporting EMR best practices to improve  
patient outcomes and clinic efficiency

Regular 60-minute webinars | Resources | Exclusive discussion board | Free





# PRACTICE FACILITATION NETWORK

Supporting skill building, idea sharing and  
fostering connection for those involved  
in practice facilitation

Monthly 60-minute webinars | Resources | Exclusive discussion board | Free





# CLINIC MANAGERS NETWORK

Supporting skill building, idea sharing and fostering connection for Alberta clinic managers

Regular 60-minute online sessions | Variety of topics | Resources | Free



Physician  
reviewed



*Now available!*

# Access Training for Primary Care

Supporting clinic teams to provide timely access to care

- ✓ 4-hour *online* time commitment
- ✓ Available on AMA-ACTT's online platform: [Learn@AMA](#)
- ✓ Optional complementary webinars via Networks of Practice, *facilitated by AMA-ACTT*



Physician  
reviewed



ALBERTA  
MEDICAL  
ASSOCIATION

ACTT  
Accelerating Change  
Transformation Team

New!

# Access Training

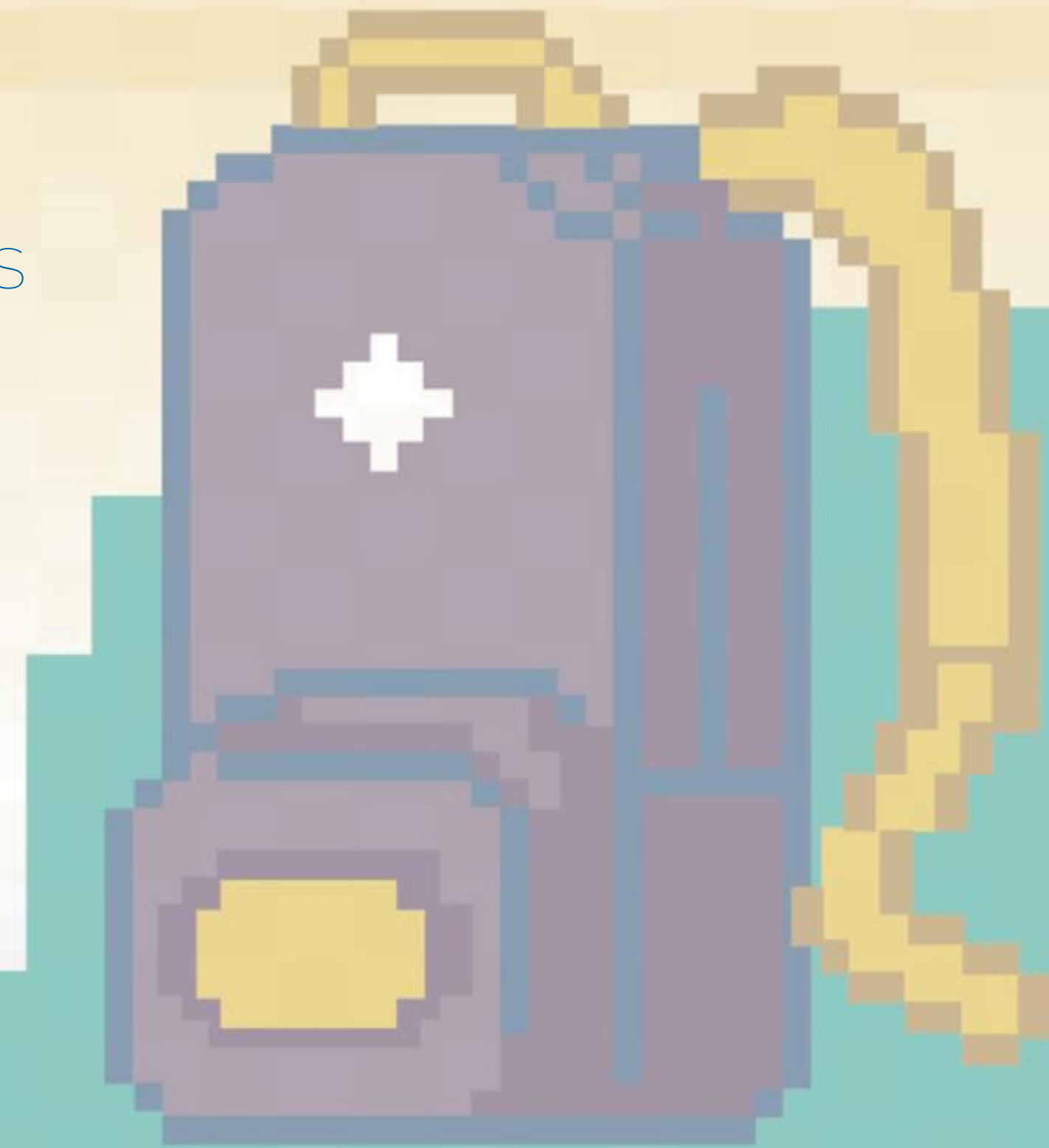
for Specialists and Team Members  
with a Caseload



2.5-hour online time  
commitment



Available on AMA-ACTT's  
online platform:  
[Learn@AMA](#)



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Thank you  
for attending



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