Strengthening Primary Care Through Nurse-Physician Teams

California HealthCare Foundation
Webinar
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Disclosure of Financial Relationships

The speakers have no relationships with any entity producing, marketing, re-selling, or distributing health care goods or services consumed by, or used on, patients
Agenda

- Introduction
- Pre-visit planning
- Prescription renewals
- Empowered Teams
- Team Meetings
- Question and Answer

Take Home Messages

- It’s all about
  - Planning ahead
  - Sharing the load
  - Enjoying the work!
Integrated, Continuous Care

- Build-in rather than Carve-out
- Nurse-MD Team
- Pre-visit planning
- Office Visit
- Efficiencies and care coordination
- Between Visit Care

Mrs. Peters

- 65 year old annual exam
  - DM2
  - HTN
  - Depression
  - Prevention
- New c/o
  - Heartburn
  - Sleep disturbance
  - Fatigue

# of Quality measures?
There is a lot to be done!

- 65 year old annual exam
  - DM2 (9)
  - HTN (17)
  - Depression (10)
- Prevention (27)
- New c/o
  - Heartburn (3)
  - Sleep disturbance
  - Fatigue

# of Quality measures? 56


There is a lot to be done!

- Too much to be done by just one person
- Too important to be left to chance

# of Quality measures? 56

Snapshot of Practice

- **Staffing**
  - Primary nurse
  - Help nurse
  - 1.5 nurse: MD
  - (no MAs)

- **Space**
  - 3 exam rooms

- **Scheduling**
  - 1 Receptionist: 2 MDs

Snapshot of Practice

- **Typical Schedule**
  - 6-8 Annual
  - 8-10 Planned Care
  - 4-6 Rapid Access

- **Panel Size**
  - 1800-2000

- **Outpatient/Inpatient**
Core Team Model: Plan Ahead, Share the Load

- Right thing happens by default
- Staff work full level of ability
- Minimize work MD does that is within skill set of others

Planned Care Appointment

- Planned Care Appt
- Pre-appt lab
- Majority lab prior to appt
- Patient part of decision making
- 67 yo diabetic
- A1c 6.3
- LDL 160
- Order sets
- Empowered Team
- Pt. Questionnaire
- Prescription Mgm’t
- Visit Summary
- Annual Exam
- Rapid Access
- Intentional Behaviors
Planned Care Appointment

- Planned Care Appt
- Order sets
- Empowered Team
- Pt. Questionnaire
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- Annual Exam
- Rapid Access
- Intentional Behaviors

Efficiency
- “Just in time” info processing
- Close the loop during that appt

Results reporting
- 4 hr clinic → 2 hr post-appt

Safety
- Missing or overlooked inform
- Pt & family part of safety net

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Lab Summary

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<td>Microalb/Creat</td>
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Post-Appointment Order Sets

- Planned Care Appt
- Order sets
- Empowered Team
- Pt. Questionnaire
- Prescription Mgm't
- Visit Summary
- Annual Exam
- Rapid Access
- Intentional Behaviors

Acute Symptom Evaluation

PE & CBC 1 vol. 1 hr before app unless all results available within 90 min

Features and the hormones binding: 
- Create a new page
- Place the order on page 15

Acute Symptom Evaluation

- Acute Symptom Evaluation
- Physical Examination
- Blood Work
- Urinalysis
- Complete Blood Count (CBC)
- Hemoglobin (Hg)
- Hematocrit (Hct)
- Red Blood Cell Count (RBC)
- White Blood Cell Count (WBC)
- Platelet Count (PLT)
- Blood Chemistry
- Liver Function Tests (LFTs)
- Renal Function Tests (RFTs)
- Electrolytes
- Blood Glucose (BG)
- Lipids
- Basic Metabolic Panel (BMP)
- Electrolyte Panel
- Lipid Panel
- Glucose Panel
- Thyroid Function Tests (TFTs)
- Thyroid Stimulating Hormone (TSH)
- Thyroid Hormone Levels (T3, T4)
- Thyroid Antibodies
- Thyroid Ultrasound
- Thyroid Fine Needle Aspiration (FNAB)
- Thyroidectomy
- Parathyroidectomy
- Thyroid Nodule biopsy
- Thyroidectomy
- Parathyroidectomy
- Thyroid Nodule biopsy
- Thyroidectomy
- Parathyroidectomy
- Thyroid Nodule biopsy

Procedures:

- Thyroidectomy
- Parathyroidectomy
- Thyroid Nodule biopsy
- Thyroidectomy
- Parathyroidectomy
- Thyroid Nodule biopsy
- Thyroidectomy
- Parathyroidectomy
- Thyroid Nodule biopsy
Planned Care Appt

Annual Comprehensive Care Visit

**Patient Information**
- Patient Name: [Redacted]
- Date of Birth: [Redacted]
- Gender: [Redacted]
- Address: [Redacted]
- Phone: [Redacted]
- Insurance: [Redacted]

**Medical History**
- Allergies: None reported.
- Family History: [Redacted]
- Current Medications: [Redacted]

**Testing and Results**

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<td>Platelets</td>
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<td>LDL</td>
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**Laboratory Results**

- CBC: [Redacted] (within normal range)
- Hemoglobin: [Redacted] (within normal range)
- Platelets: [Redacted] (within normal range)
- Sodium: [Redacted] (within normal range)
- Potassium: [Redacted] (within normal range)
- BUN: [Redacted] (within normal range)
- Creatinine: [Redacted] (within normal range)
- Glucose: [Redacted] (within normal range)
- Triglycerides: [Redacted] (within normal range)
- Total Cholesterol: [Redacted] (within normal range)
- HDL: [Redacted] (within normal range)
- LDL: [Redacted] (within normal range)

**Diabetes Status**
- Diabetes Control: [Redacted]
- Fasting Blood Sugar: [Redacted]
- 2-Hour Postprandial Blood Sugar: [Redacted]

**Smoking Status**
- Current Smoker: No
- Recent Quit Date: [Redacted]
- Tobacco Use: [Redacted]

**Weight and Height**
- Height: [Redacted]
- Weight: [Redacted]
- Body Mass Index: [Redacted]

**Physical Exam**
- Vital Signs: Blood Pressure: [Redacted], Heart Rate: [Redacted], Respiration Rate: [Redacted]
- Skin: [Redacted]
- Lungs: [Redacted]
- Heart: [Redacted]
- Abdomen: [Redacted]
- Musculoskeletal: [Redacted]

**Plan of Care**
- Follow-up: [Redacted]
- Referrals: [Redacted]
- Medications: [Redacted]
- Laboratory Tests: [Redacted]
- Other Services: [Redacted]

**Patient Education**
- Healthy Lifestyle: [Redacted]
- Nutrition: [Redacted]
- Exercise: [Redacted]
- Stress Management: [Redacted]

**Patient Comments**
- Patient Comments: [Redacted]

**Signature**
- Signature: [Redacted]
- Date: 8/17/2010

**Physician Signature**
- Signature: [Redacted]
- Date: 8/17/2010
Post-Appointment Order Sets

- Planned Care Appt
- Order sets
- Empowered Team
- Pt. Questionnaire
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- Rapid Access
- Intentional Behaviors

- 64 yo DM 2, hypothyroidism, atrial fibrillation, CRI
Post-Appointment Order Sets

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- "The next appointment starts today"
- A plan, a promise to continue the relationship
- "We want to see you again, and we will plan ahead to make that most meaningful."
Between Visit

- Extension of me when dealing with patients; patients recognize this.
- Coordinates transitions (hospital, NH, Hospice)
- Manages & returns most phone calls
- Does prescriptions

The Boss

- Updates EHR
- Completes all paperwork

Visit

- Initial review of lab
- Immunizations
- Colonoscopy
- Sx driven tests (PFT, EKG)
- Diabetic foot exam/eye exam
- Standardized, predictable
- Present patient (↓ info drop-off)

Mini-huddle

- Planned Care Appt
- Order sets
- Empowered Team
- Pt. Questionnaire
- Prescription Mgm’t
- Visit Summary
- Annual Exam
- Rapid Access
- Intentional Behaviors

- Staff deeply engaged
- Mentor nurses
- Physician better prepared
- Stronger handoff
Mini-huddle

- Planned Care Appt
- Order sets
- Empowered Team
- Pt. Questionnaire
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- 47 yo “Rapid Access” new patient
  CC: dysphagia
- Nurse Mini-huddle
  - “She seems depressed”
  - “Is anyone hurting you?”
- Physician better prepared

Introduction to Partnership

- Planned Care Appt
- Order sets
- Empowered Team
- Pt. Questionnaire
- Prescription Mgm’t
- Visit Summary
- Annual Exam
- Rapid Access
- Intentional Behaviors
Introduction to Partnership

- Planned Care Appt
- Order sets
- Empowered Team
- Pt. Questionnaire
- Prescription Mgm’t
- Visit Summary
- Annual Exam
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Welcome to our practice.

Our goal is to make you an active, involved, and active partner in your care. We want to empower you to take charge of your health.

Your healthcare team

Dr. Grammar leads a 2-hour seminar on the fundamentals of chronic disease management. In this seminar, you will learn about:

- Disease management
- Lifestyle changes
- Medication management

Dr. Grammar also provides a hands-on demonstration of the latest technologies and devices.

Empowered Team

- Pt. Questionnaire
- Prescription Mgm’t
- Visit Summary
- Annual Exam
- Rapid Access
- Intentional Behaviors

Survey: majority calls for scripts

Systems: all scripts 1 yr at annual

Efficiency: ↓ phone calls by 50%

Synchronized, Bundled Renewals
Prescription Management

- Planned Care Appt
- Order sets
- Empowered Team
- Pt. Questionnaire
- Prescription Mgm't
- Visit Summary
- Annual Exam
- Rapid Access
- Intentional Behaviors

We don’t use scripts as hook
- Planned care appts (not expired script) trigger disease monitoring
- Avoid loading interval visits with unnecessary, redundant work

Team Meetings

- Meeting q 2 weeks
- Participants:
  - 2 MDs
  - 4 nurses
  - Receptionist
  - Nurse Manager
  - “just immediate family”
- Agenda
  - Posted and Pre-planned
Team Meetings: Goals

- “Operation QES”
  - Quality
  - Efficiency
  - Satisfaction
- Improve experience care
  - Pt
  - Staff
  - Physician
- Streamline processes
  - ↓ re-work, unnecessary work, mis-directed work

Team Meeting: Agenda

- Check in 1:00-1:10
- Check-back 1:10-1:20
  
  *Pt’s weigh selves and mark BMI on graph
  “Fail fast, fail often … and learn”*
- Refinement of Workflow 1:20-1:50
  
  *Value stream mapping: improve timeliness*
- Education 1:50-2:00
  
  *Diabetic targets, HINI, Diuretics, Mammograms, Motivational Interviewing*
Building Self-Management into Every Aspect of Clinic Care

Not every idea is a keeper

Team Meeting: Agenda

- Check in 1:00-1:10
- Check-back 1:10-1:20
  - Pt’s weigh selves and mark BMI on graph
  - “Fail fast, fail often … and learn”
- Refinement of Workflow 1:20-1:50
  - Timeliness initiative
- Education 1:50-2:00
  - Diabetic targets, HINI, Diuretics, Mammograms, Motivational Interviewing
Team Meetings

- Protected time for communication, mentoring
- Attention to nitty-gritty details
- Everyone sets the agenda
- Staff as problem solvers
- Feedback from those doing the work
- Changes discussed/approved then implemented
- Continually refine the choreography of work day

Integrated, Continuous Care

![Diagram showing Integrated, Continuous Care process]

- Planned Care: HTN, Chol, Glucose, Osteoporosis, Depression, LDL 75, A1c 6.2
- Lab: Sept, Lab
- Orders: Comprehensive, Prevent, Same Day Surgery Appt
- Nurse-MD Team

Efficiencies and care coordination
Take Home Messages

- It’s all about
  - Planning ahead
  - Sharing the load
  - Enjoying the work!
Questions or Comments?

Resources: Sinsky Model

- Sinsky CA et al. Core Teams: Nurse-Physician Partnerships Provide Patient Centered Care at an Iowa Practice. *Health Affairs* 2010;29:5