



Session # D1

Use of Practice Integration Profile to Inform Quality Improvement Processes

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Faculty Disclosure

The presenters of this session have NOT had any relevant financial relationships during the past 12 months.

Conference Resources

Slides and handouts shared in advance by our Conference Presenters are available on the CFHA website at http://www.cfha.net/?page=Resources_2018



Slides and handouts are also available on the mobile app.



Learning Objectives

At the conclusion of this session, the participant will be able to:

- ...describe the six domains of the Practice Integration Profile.
- ...analyze the six domains of the Practice Integration Profile.
- ...apply the data from Practice Integration Profile reports in a Lean QI process.



Bibliography / Reference

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8. Neilsen M. Behavioral Health Integration: A Critical Component of Primary Care and the Patient-Centered Medical Home. *Families, systems & health*. 2014;32(2):149-150.
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11. Spear S, Bowen K. Decoding the DNA of the Toyota Production System. *Harvard business review*. 1999;77(6):97-106.
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Learning Assessment

A learning assessment is required for CE credit.

A question and answer period will be conducted at the end of this presentation.

Key Concepts & Activities

- **PIP: Practice Integration Profile**
- **QI: Lean Design of Workflow**
- **Application: Case Study Redesign Team**

Goal & Plan

- Goal

- Apply the data from Practice Integration Profile reports in a Lean QI process using a team-based simulation

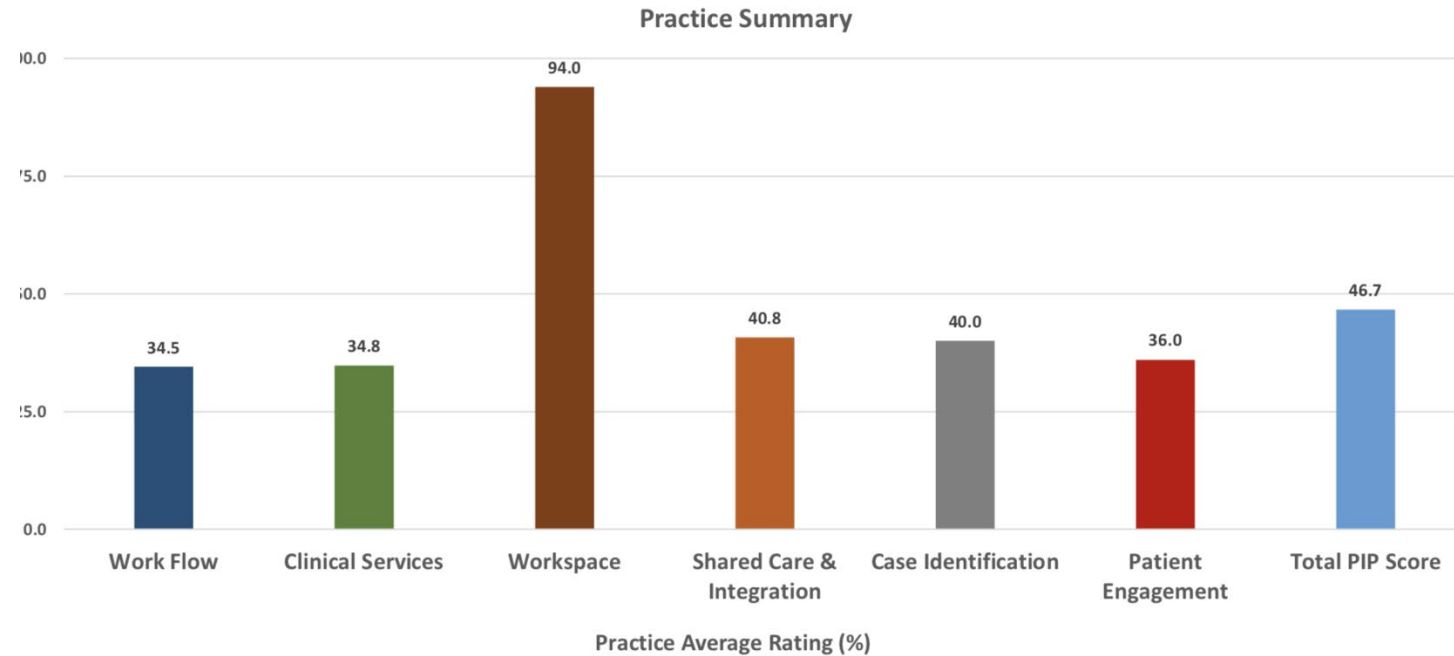
- Plan

- You are members of a QI design team to improve integration
- BH provider is co-located on-site, but not fully integrated:
 - Workflows, Office systems, Space, EHR
- You have data from your most recent PIP
- Your team has started to work on the first steps of redesign
- Today: identify opportunities for changes in integration

Self-Assessment: PIP Results

Validated self-assessment in six domains:

- Workflow
- Clinical services
- Workspace
- Shared Care
- Case identification
- Patient Engagement



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Registry Tracking

- A registry uniquely flags patients for easy identification
- Steps:
 - Create roster for selected patient populations
 - Review as patients arrive: on/off list
 - Track patients needing follow up



PIP Report – Practice Workflow

<i>Response Rating:</i> 0, Never 1, Sometimes 2, Often 3, Frequently 4, Always	Priority	Practice Average Rating	Respondent 1 Rating	Respondent 2 Rating	Respondent 3 Rating	Respondent 4 Rating
PRACTICE WORKFLOW: includes standard activities to support consistent delivery of evidence-based services for patients in need						
WF1 ...we use a standard protocol to identify, assess, treat, and follow up patients who need or can benefit from integrated Behavioral Health (BH).	Low	2.00	3	1	2	2
WF2 ...we use registry tracking to identify and follow patients with identified BH issues.	High	0.75	1	0	2	0
WF3 ...we coordinate clinical care and or provide bidirectional communication for patients with BH issues who would benefit from specialty services (not primary care).	Medium	1.75	2	1	2	2

Priority key – level of need (ranging from low to high) for attention



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Previous Work Accomplished: Team's Focus

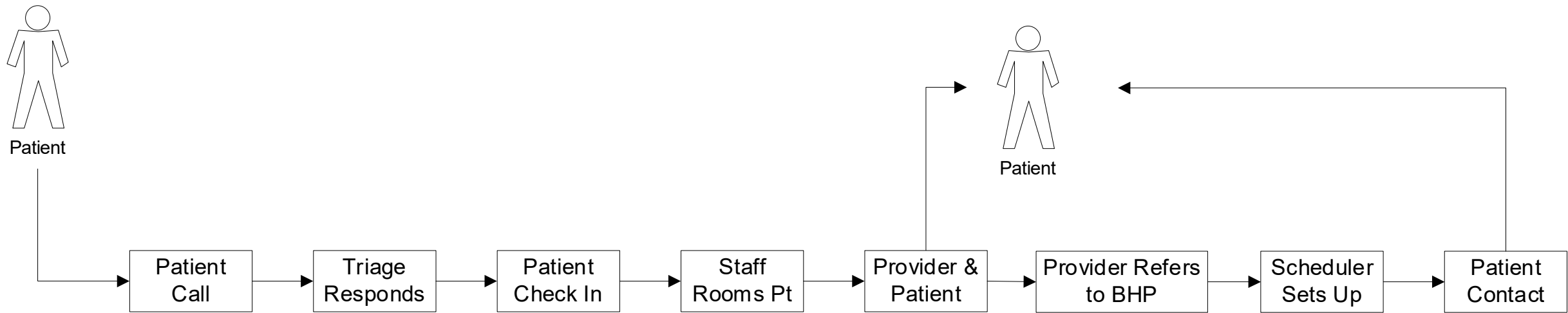
“Integrated care will support a patient experience of collaborative effort between patient and care team with seamless communication to enhance mind/body wellness.”

Previous Work Accomplished:

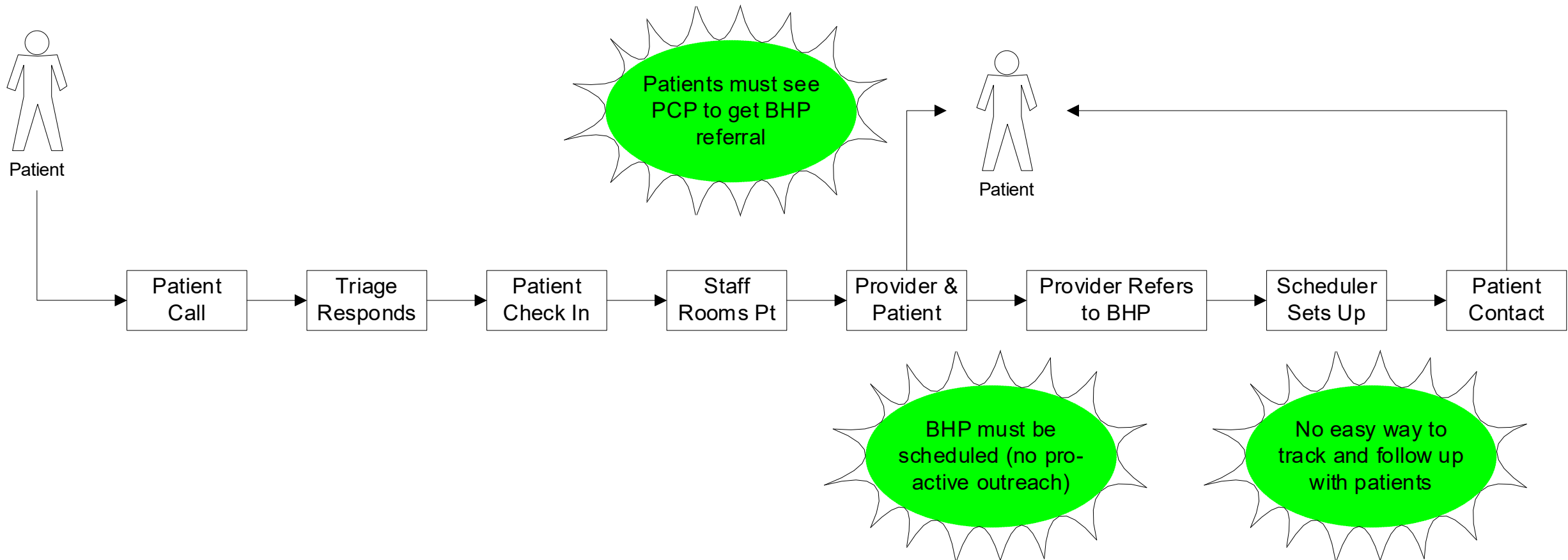
Background related to the Focus

- Hard to identify, track, and follow up with patients over time
- Lack of bi-directional communication among providers
- Few community mental health resources (psychiatrists...)
- Lack of continuity when patient does not see own PCP
- Communication barriers: patient's expectations for care

Previous Work Accomplished: Observed Current State



Previous Work Accomplished: Analyzed the Current State



QI: Lean Design of Workflow

“Every system is perfectly designed
to get the results it gets.
To get different results,
you need to improve the design of the system.”
--Hanna, 1988



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Team Exercise



Team Assignment: Apply Tactics & Create New Workflow

- Discuss: ideas and tactics that will improve workflow
- List: specific changes (or replacements) to the current state diagram
- Draw: the new workflow so that all of us can see what your team envisions



Example Tactics Using a Registry

- Create a registry to identify patients who might be or are in need of integrated BH
- Report regularly on registry patients and when the last visit with the BH provider
- Identify patients who should be screened at future visits
- Identify patients who should be contacted for visits with PCP or BHP
- Reach out to non-responding patients to provide care

Start your team meeting – and remember:



Design Problems
Really Can Slow You
Down



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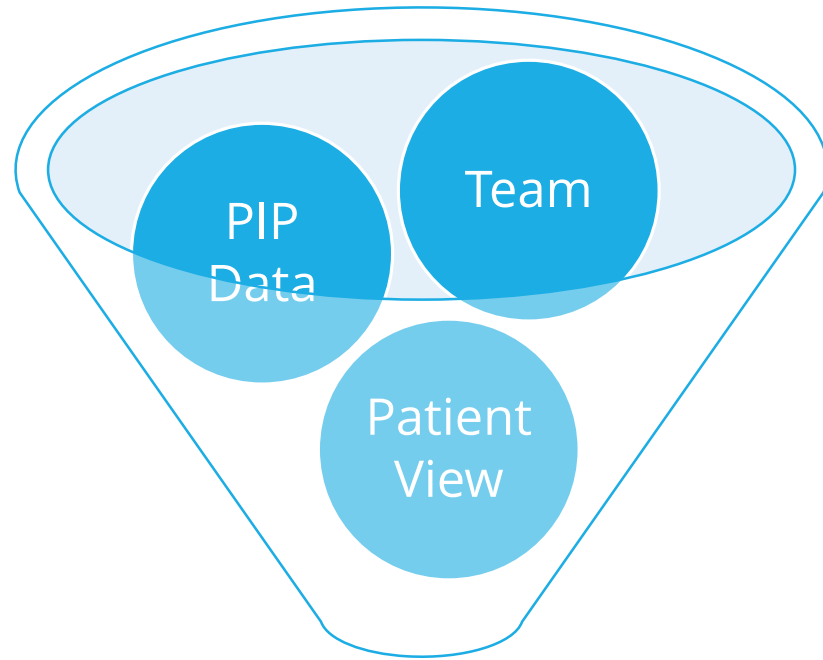
Team Report

- What specific changes (or replacements) to the current state diagram did your team identify?
- What does the new workflow look like?



Discussion

Ingredients for Improving Integration



Lean Management Process

Improved Patient Care



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Lean Management

“A systematic approach
to identifying and eliminating waste (non-value added activities)
through continuous improvement
by flowing the product
at the pull of the customer in pursuit of perfection.”

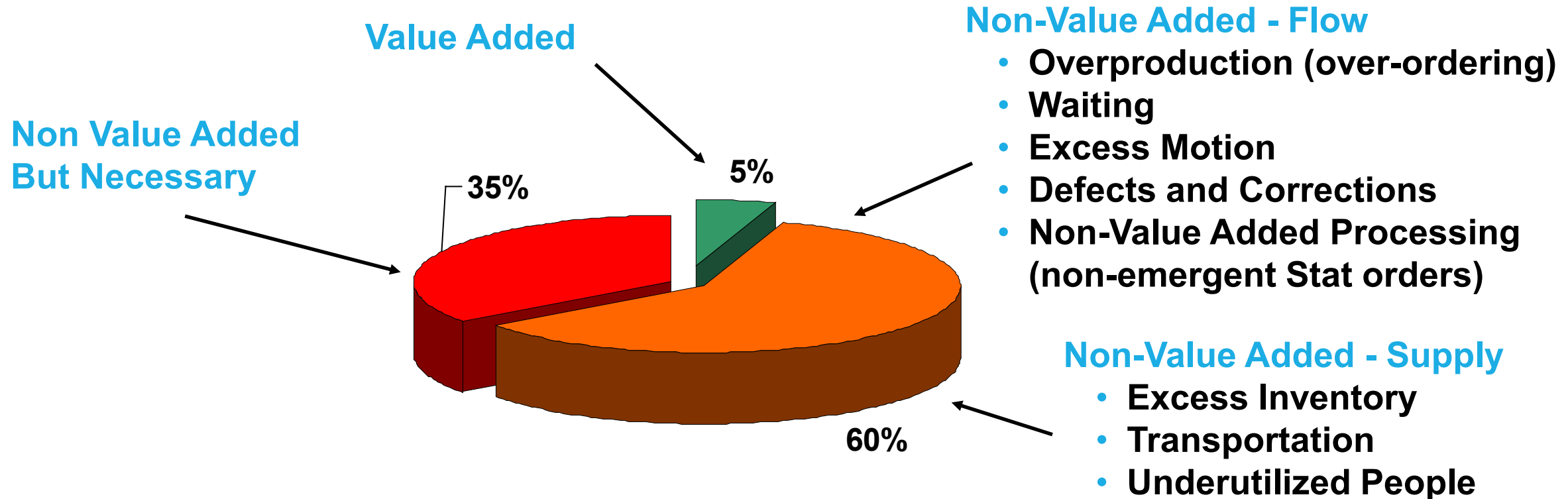
-- The Manufacturing Extension Partnership Lean Network



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Waste in Health Care



Lean A3 Problem-Solving Method

Current State	Future State
Focus	Review & Select Tactics
Background	Design Future Workflow
Current Workflow	Draft Implementation Plan
Analysis of Current Workflow	Communicate & prep PDSA

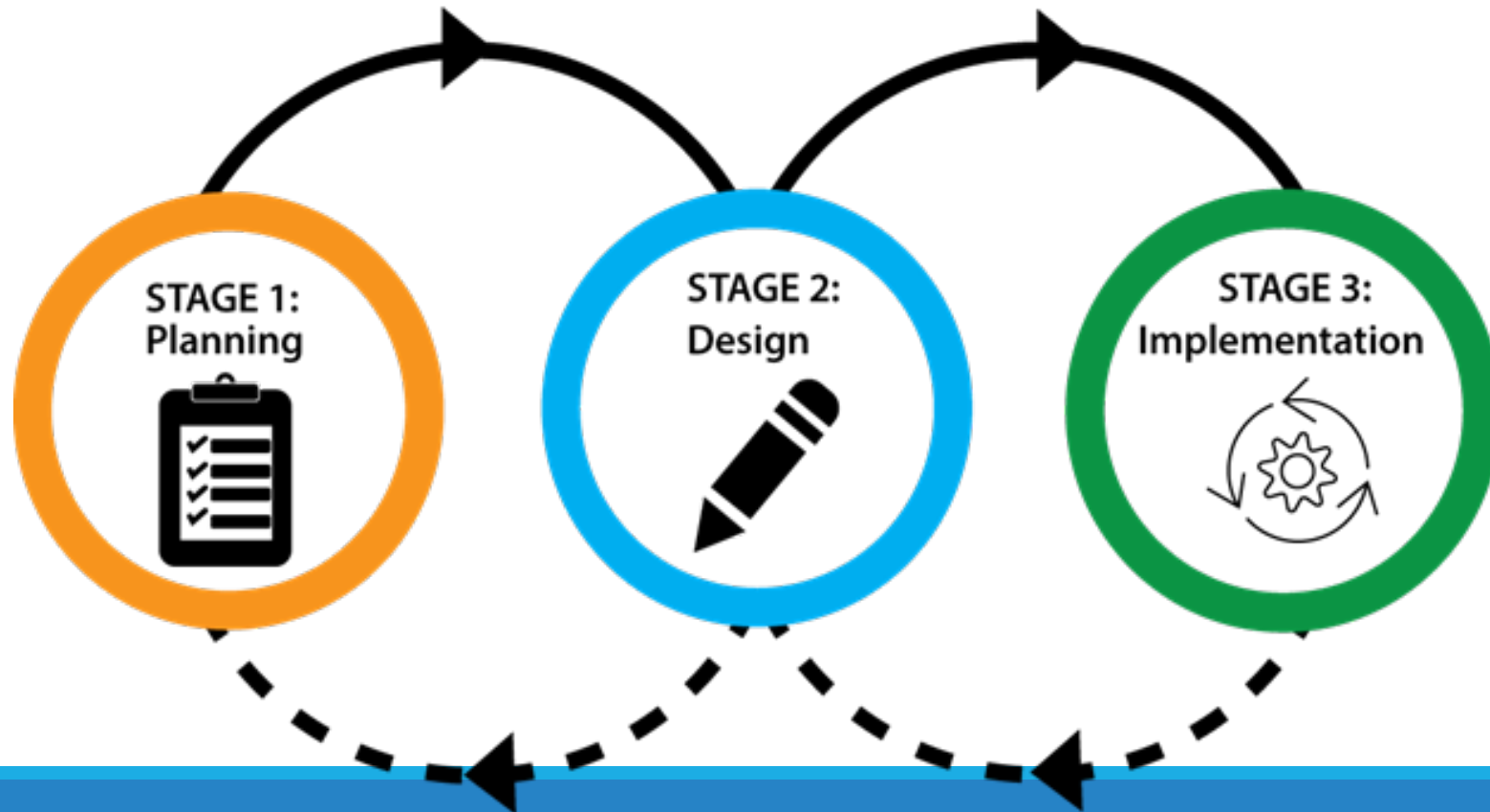


A3 Problem-Solving Method

Title/Opportunity for Change:		Tactics:		Ideas to counter reasons for "Why":			Look at new tactics in the IBHPC toolkit:				
Team:		Team Leader: Team Members: Meeting Dates and Times:		A standard method that everyone agrees to Visually easy signals New roles for staff Updated reward and recognition systems Improved work place layout			Clinical strategies Operational strategies Financial strategies Select those that can be included in the new process at this time				
Background:		Ask: What do we already know about the issue? List the answers, including the patient's perspective		Future Workflow:		Draw the steps horizontally. Identify the new changes or strategies used in each task. Identify the goals and how to measure them.					
Current Workflow		Describe the current process for caring for a patient with complex conditions. Make a list of each task in the process grouping together those done by one job function (receptionist, medical assistant, nurse, provider, etc.). Describe clearly the activities completed in each task, including what happens with the patient's information, so everyone shares a complete understanding.		Implementation Plan:							
		See the process from the patient's perspective and map the step-by-step activities to visually represent the path taken by a typical patient and the care team, from arrival at the office or telephone call to medication choices, referrals, and follow-up care. Be sure to include any steps that are outside of the visit, including calls to the patient.									
		The resulting diagram will assist the team in visualizing the order of patient		Test of Change		Start Date	Who	Scope	Due	Status	Measure of Success
Workflow Analysis											
For each step or space with a long delay, ask:		For each step missing, incomplete, or inaccurate data or materials, ask:									
Why?		Why?									
Why?		Why?									
Why?		Why?									
Why?		Why?									
Why?		Why?									
				Follow Up PDSA (Stage 3):							
				What		Who		When			
				Implementation Plan Milestone #1		(name)		(date due)			
				Implementation Plan Milestone #2		(name)		(date due)			

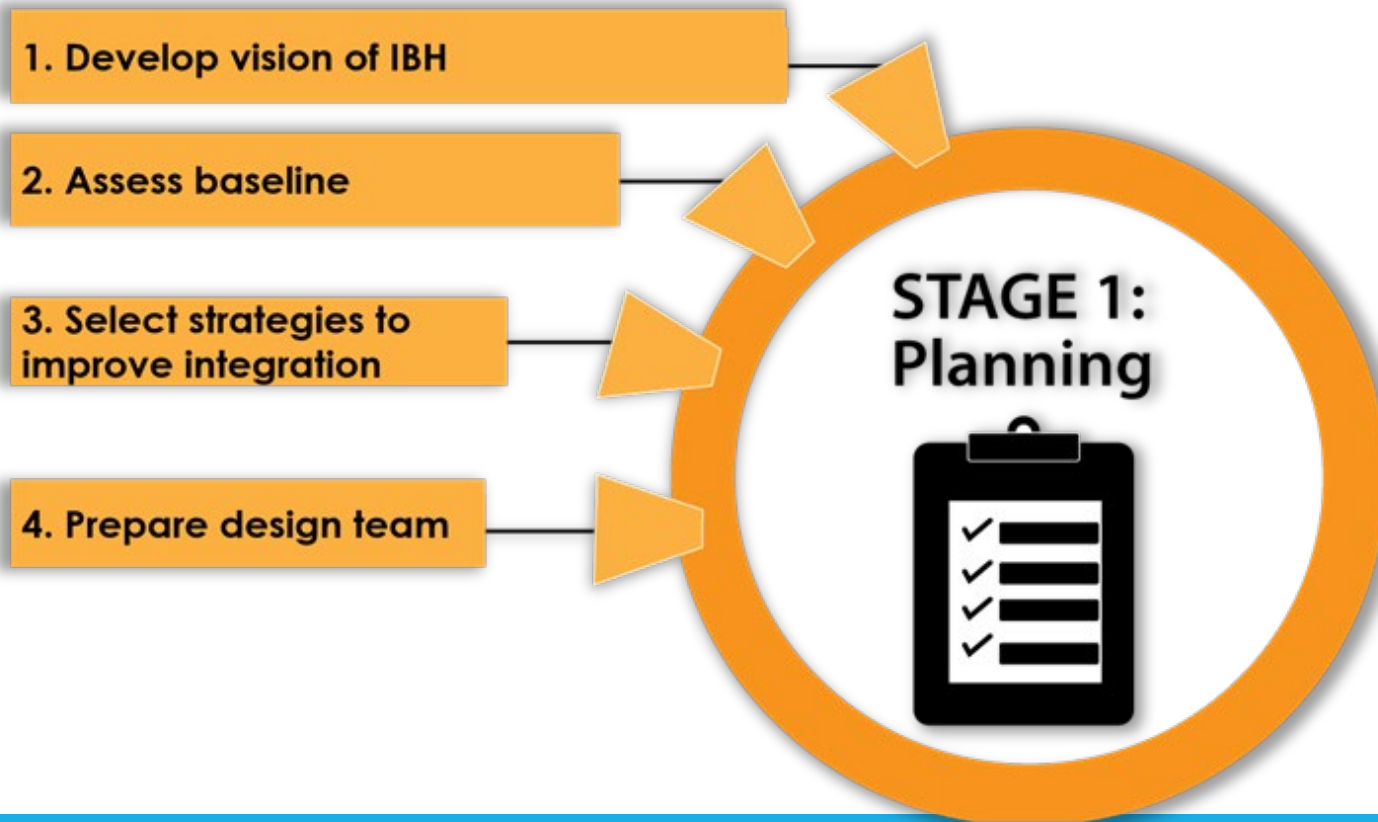


Lean & Integrated Behavioral Health and Primary Care in 3 Stages

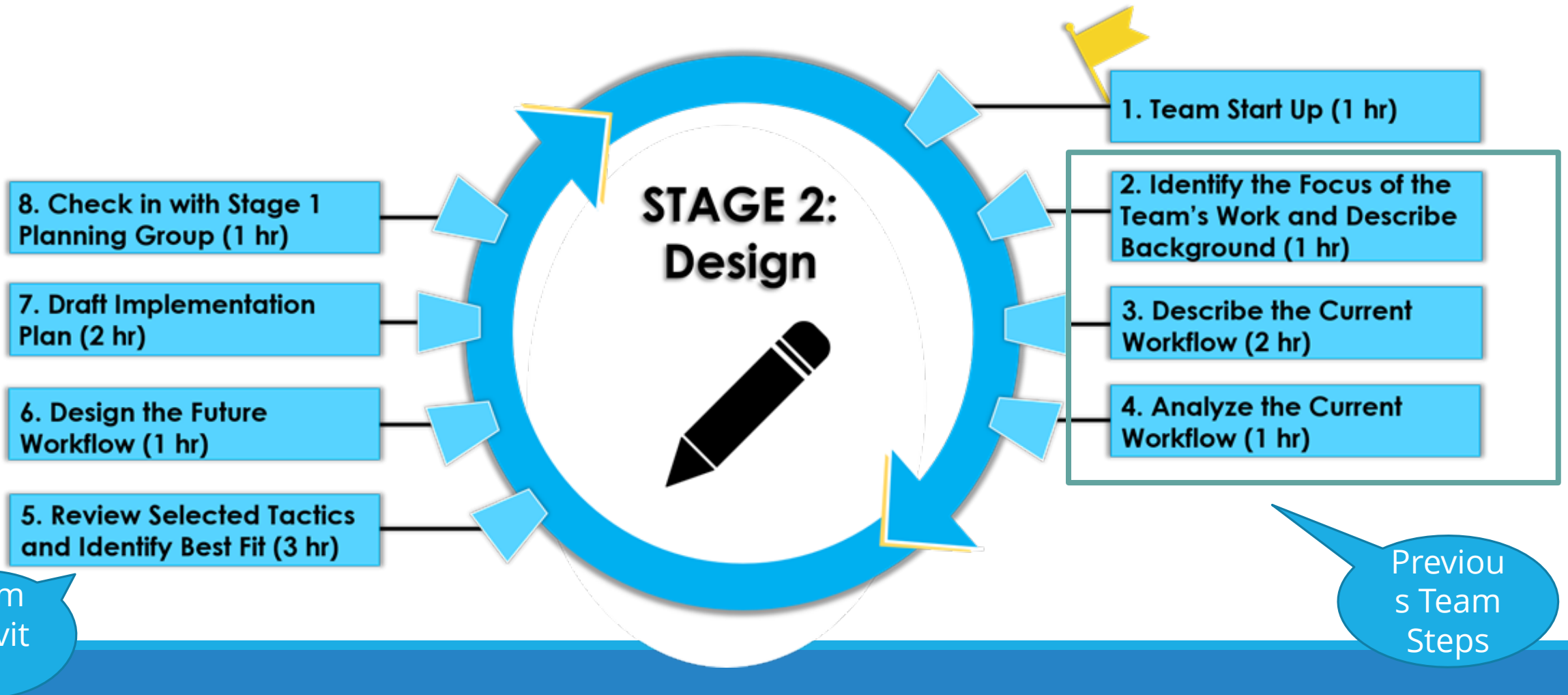


Defining Vision & Strategies: Stage 1 - Plan

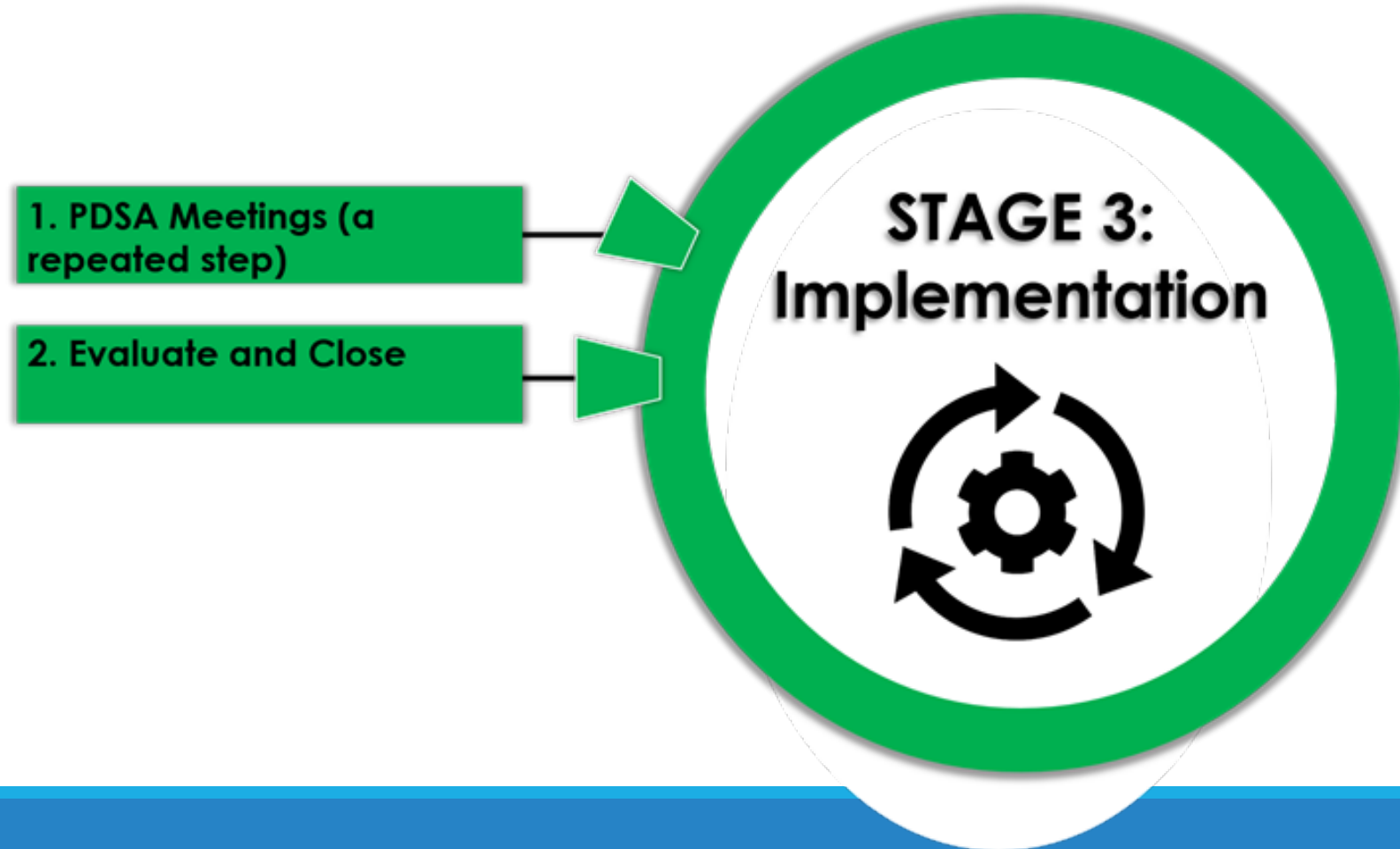
Analyze
PIP
results



Analyzing & Developing Workflows: Stage 2 - Design



Tests of Change: Stage 3 - Implementation



Small Rapid Testing Cycles (PDSA)



```
graph TD; Act[Act] --> Plan[Plan]; Plan --> Do[Do]; Do --> Study[Study]; Study --> Act;
```

Act

- **Adopt, adapt or abandon based on what was learned**
- **Build knowledge into next PDSA cycle**

Plan

- **State objectives**
- **Make predictions**
- **Who will do what by when**

Study

- **Complete analysis**
- **Compare data to prediction**
 - **Summaries what was learned**

Do

- **Carry out the test**
- **Document problems, surprises, observations**

What to think about on your way home

- Ask questions – be curious & ask unscripted questions.
- Focus on **your** quality issues
- Count something – you need data to influence
- Re-design something – team-based problem solving
- Be an early ADOPTER – it won't be a risk if you:
 - Plan
 - Design
 - Implement: Plan, Do, Study, Act
- Write something – share what you learn



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Practice Integration Profile link:

practiceintegrationprofile.com



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Session Evaluation

Use the CFHA mobile app to complete the evaluation for this session.

Thank you!

