

Together2Goal[®]

AMGA Foundation
National Diabetes Campaign

Monthly Campaign Webinar

July 19, 2018

TODAY'S WEBINAR

- **Together 2 Goal[®] Updates**
 - Webinar Reminders
 - 2018 Institute for Quality Leadership (IQL)
 - 2019 Acclaim Award Application
- **Shared Medical Appointments for Diabetes Care**
 - Marianne Sumego, M.D. of Cleveland Clinic
- **Q&A**
 - Use Q&A or chat feature



WEBINAR REMINDERS

- Webinar will be recorded today and available the week of July 23rd
 - www.Together2Goal.org
- Participants are encouraged to ask questions using the “Chat” and “Q&A” functions on the right side of your screen



2018 Institute for Quality Leadership

Medicare Advantage and Risk: Delivering on the Promise of Value

November 13-15, 2018 • San Antonio, Texas



Together 2 Goal[®] Peer-to-Peer Breakout Session: Taking Diabetes to Heart: Finding Value in the Medicare Population

Featuring:



Registration now open at amga.org/IQL18

2019 ACCLAIM AWARD APPLICATION

Applications Due September 21

Honors the nation's premier healthcare delivery organizations that are high performing:

- Measurably improving the quality and value of care
- Improving patient experience and outcomes
- Continuously learning and innovating
- Improving population health

Contact Sunny Temesgen, at stemesgen@amga.org for more information



TODAY'S FEATURED PRESENTER

Marianne Sumego, M.D.

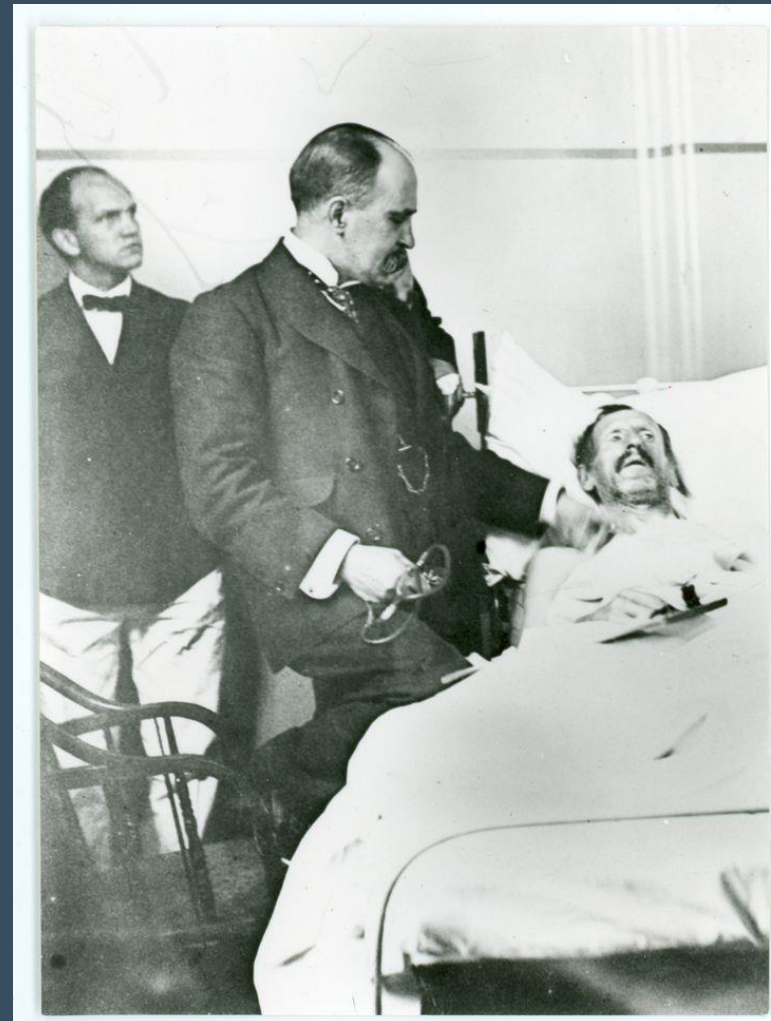


Medical Director, Shared Medical Appointment Program,
Cleveland Clinic

Our mission.....

“The good physician treats the disease, the great physician treats the patient who has the disease.”

Sir William Osler



Who I am...

Medical Director of Shared medical
appointment program
Office of patient experience

SMA's for
Chronic disease,
Woman's Wellness



Passion:
Healthy
cooking



Agenda

- Overview
- Cheryl's story
- Quick take aways
- Next steps

Shared Medical Appointment (SMA)

- Similar condition or wellness care
- Multiple patients seen simultaneously
- Learning is enhanced through repetition, common education



SMA Benefits

Provider

- Improved access
- Leverage resources
- Maximize scope of practice
- Workflow efficiency
- Remove redundancy
- Satisfaction
- **Quality Visits**

Patient

- Prompt Access to Care
- Inc. physician time
- *Access to additional learning resources*
- *Learning enhanced through repetition*
- Satisfaction
- ***Quality of care***

Essential SMA Elements

- 90 minute appointment
- 8-12 patients with Diabetes
- Individual Appointments conducted in sequence
- Address labs, refills, care plan
- Privacy is addressed
- E&M visit



The How: It takes a team !!!!!



SMA team

- Clerical : Schedule , offer to patients, identify
- Clinical Intake : Medical assistant
- Primary Medical Provider :MD, DO, NP, PA
- Facilitator : NP, RN, Nutritionist, Social Worker, CDE, RD, Pharm
- Administration : Coordination and Support

Workflow

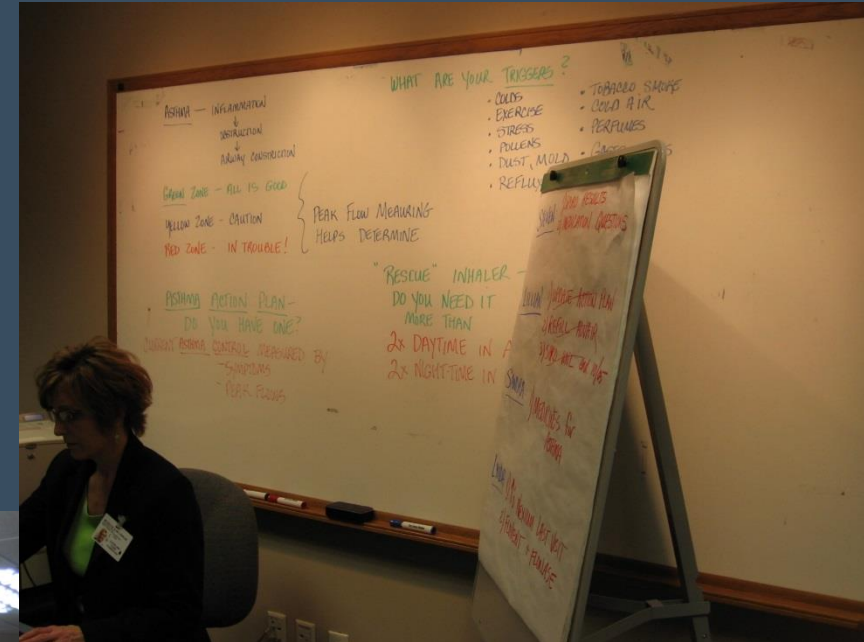
- **Clerical** – patients check in with co-pays 15 – 20 minutes early
8-12 patients (support)
- **Clinical Intake** – patients are roomed/intake, vitals and intake, gather results
(support), name tags, flip chart prep
- **Facilitator** – **Room prep**, Begins documenting concerns (HPI), facilitates teaching and discussion, supports provider with expertise, wraps up
- **Primary Medical Provider** - Conducts visit addressing each patient in sequence, documents exam, plan of care determined, close and billing

SMA Set-up



Facilitator

Provider



Patients



To facilitate.....



To make something easier
To help something run smoother, more effective



Facilitator role

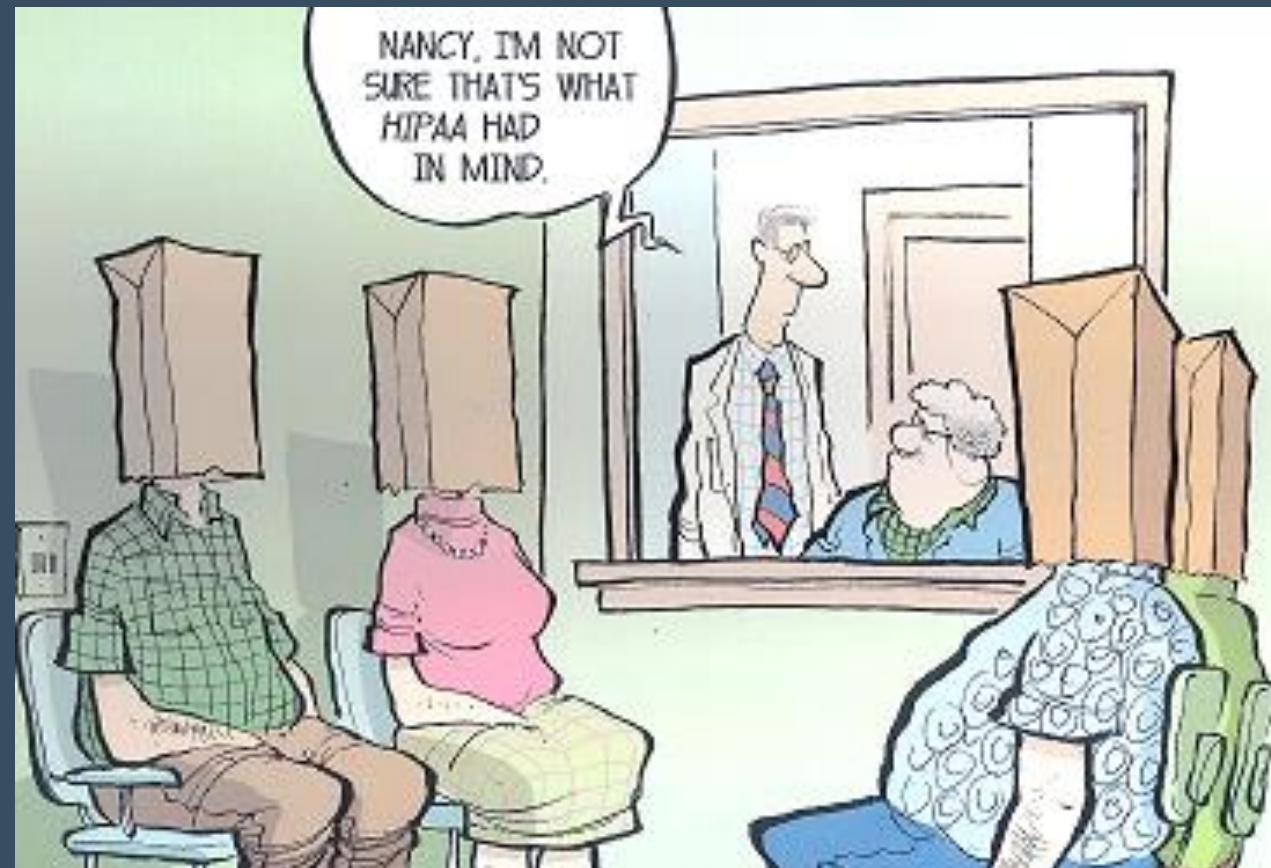
Pre-visit

- Frontload , abstract, review
- Address needed labs
- Room prep, name tags
- Educational materials

Appointment

- Meet and greet, expectations
- Review privacy
- HPI gathering
- Consider documentation
- Add value, education
- Discharge instructions
- Satisfaction survey

Privacy Concerns???



Privacy Waiver

- ❖ Discuss the form in front of entire group
- ❖ If family members are present they are required to sign the form also
- ❖ Collect forms and record/scan
- ❖ Needs to be signed at EVERY visit

Cleveland Clinic
 Shared Medical Appointments
 Shared learning for a healthier future

Place Cleveland Clinic Visit Label here

Shared Medical Appointment Acknowledgment

For the purposes of this form, "you" and "your" mean the individual(s) listed below who will attend the Shared Medical Appointment. The use of the words "Cleveland Clinic" means The Cleveland Clinic Foundation and its affiliated facilities.

By signing this form, you agree to respect other participants by not sharing their medical or personal information outside of this appointment. During your Shared Medical Appointment, you will have the opportunity to meet with a provider to discuss information and ask questions relating to your medical condition. The Shared Medical Appointment will take place in a group setting with other patients present. The personal information shared during an individual appointment is normally considered confidential, but this confidentiality may be lost by revealing the same information in a group setting. Other patients, family members, and other individuals may be present during the Shared Medical Appointment and may hear some of your discussions. It is also important to note that medical information provided in response to another patient's questions may not be appropriate for all patients.

By signing below and participating in the Shared Medical Appointment, you understand that you are choosing to participate in a group setting and Cleveland Clinic is not able to protect the privacy and confidentiality of what is discussed at the Shared Medical Appointment. Therefore, you agree that Cleveland Clinic shall not be liable for any financial or other damages resulting from the group nature of the Shared Medical Appointment and/or other participants in the Shared Medical Appointment.

In accordance with Cleveland Clinic's commitment to maintaining the privacy of its patients, you also agree to protect the privacy of other participants of the Shared Medical Appointment by not identifying other patients or discussing their personal information and/or medical condition outside of the Shared Medical Appointment.

You understand that you or your insurance may be billed for this appointment. You are aware of your responsibility to pay any copays or other costs associated with any services provided in the course of the Shared Medical Appointment that your insurance may not cover.

Patient Signature: _____ Date: _____

Support Person: Relationship: _____
(e.g., patient's family member, friend, home health aide)

Printed Name _____

Signature: _____ Date: _____

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How do we organize chaos ???

- Patient expectations
- What information is needed prior to the visit?
- White board data
- Efficient documentation



Pre-visit call:

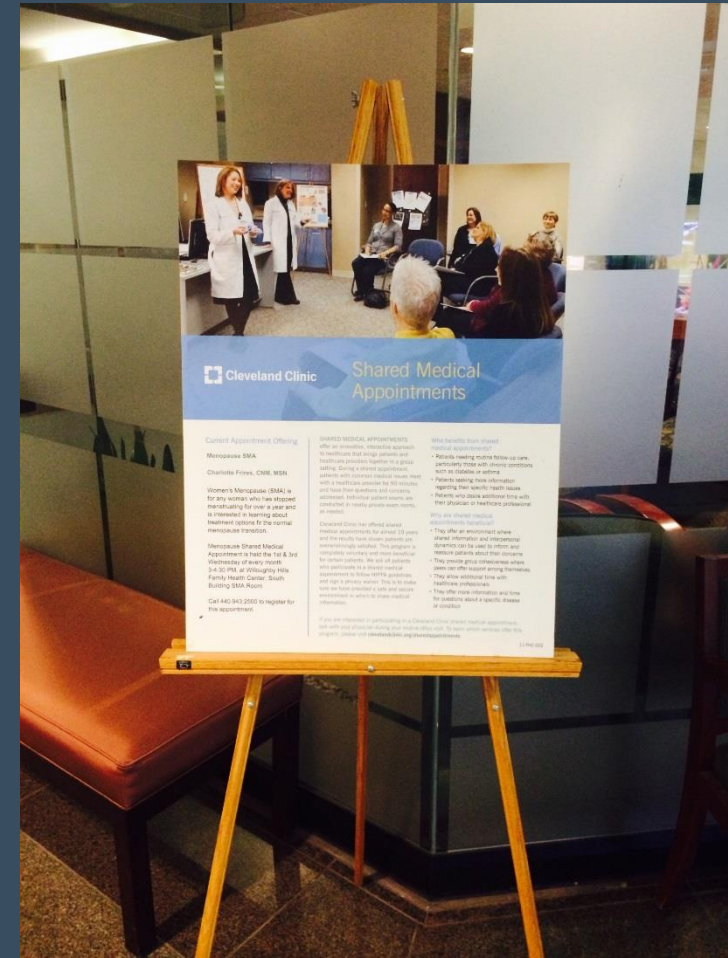
- ✓ Patient expectations
- ✓ Information gathering

The screenshot displays the Epic EMR interface for a patient named Annette Zeldin. The main window shows a summary of a telephone visit on 1/21/2016. The 'Reason for Call' section is highlighted, showing a table with the following data:

Reason for Call	Onset	Comment
SMA pre-visit [Other]	1/21/2016	

Below the table, there are buttons for 'Delete' and 'Add to Preference List'. The 'Vitals' section shows 'None Taken' for tobacco and smoking status. The 'Verify Pharmacy Benefits' section indicates that no pharmacy benefits eligibility data was found for this visit. The 'Surescripts Payer Disclaimer' and 'Reconcile Medication Dispenses' sections are also visible. The interface includes a navigation menu on the left, a top toolbar with various tools, and a Windows taskbar at the bottom.

Patient awareness



Information: Sample White Board Patient data

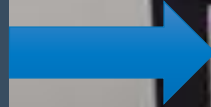
Name	A1C	Glucose (mg/dL)	LDL (mg/dL)	Triglycerides (mg/dL)	HDL (mg/dL)	Total Cholesterol (mg/dL)	Blood Pressure (mmHg)	Questions
<small>11/15/18 Learner: Dr. [unclear] Learner: [unclear] Learner: [unclear]</small>	7.2 ↓	103	79	109	45	146	132/78 ()	None
<small>11/15/18 Learner: Dr. [unclear] Learner: [unclear] Learner: [unclear]</small>	6.6 ↑	124	104	48	84	198	138/70 (111/77)	
<small>11/15/18 Learner: Dr. [unclear] Learner: [unclear] Learner: [unclear]</small>		105	82	147	53	164	134/78 (134/80)	
<small>11/15/18 Learner: Dr. [unclear] Learner: [unclear] Learner: [unclear]</small>	6.4 ↓	112	58	213	37	138	132/68 (134/78)	
<small>11/15/18 Learner: Dr. [unclear] Learner: [unclear] Learner: [unclear]</small>	6.4 ↓	99	113	34	46	166	120/78 ()	Red [unclear]



Sample white board.... Adding to documentation

- ✓ Last visit
- ✓ Medication change
- ✓ Disease status

Name	HGBA1C	Glucose (60-100)	LDL 2130 <70	Triglycerides 2150
Ann Other Dx: HTN HPL LOV: 517 Med Δ: none	7.2 ↓	103	79	109
Conn Other Dx: HTN HPL LOV: 517 Med Δ: Eido	6.6 ↑	124	104	48
Suzanne Other Dx: HTN HPL LOV: 517 Med Δ: none		105	82	147
Frank Other Dx: HTN HPL LOV: 6129 Med Δ: firofio	6.4 ↓	112	58	213
NOTTO Other Dx: none LOV: 7113 Med Δ: started	6.4 ↓	99	113	34



Cheryl's story

- Age 57 y/o
- Duration of DM: 2006, last A1c under 7.0 in 2012
- PMH: HTN, Hyperlipidemia, DM, Optic atrophy with visual impairment
Depression off and on since 2008
- Saw endocrinology and PCP for DM management off and on since 2011
- Recruited by her PCP to the DM SMA

Her SMA story

Entrance (11/17)

- Renal function normal
- A1c 9.3
- TC 260
- LDL 150
- weight : 262 #

Today (6/18)

- A1c 8.0 (2016) ↓
- A1c 7.0 ★
- TC 181
- LDL 104
- Weight 250 #

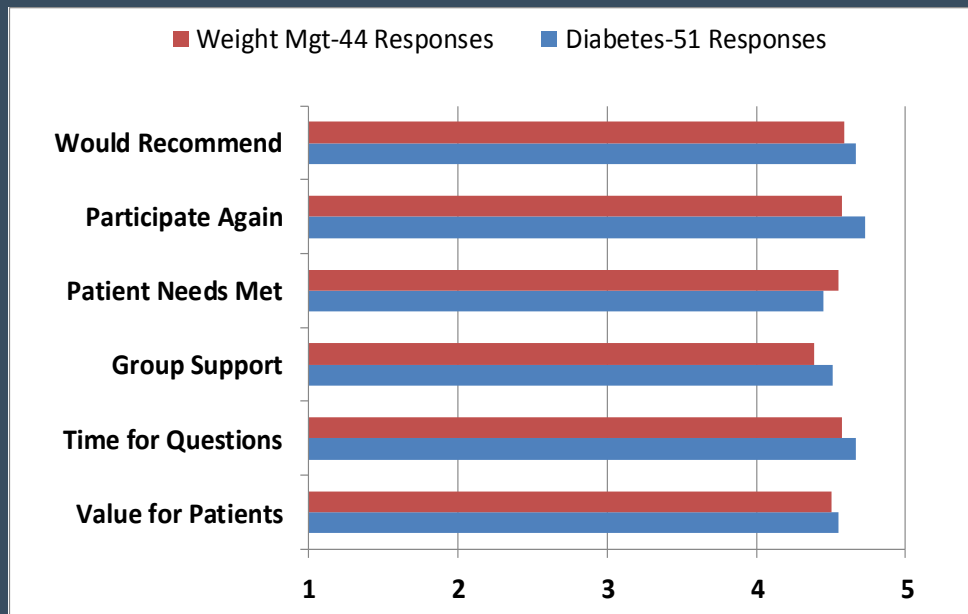
Actively working with nutrition and psychology
Personal accomplishments

PATIENT EXPERIENCE



Internal SMA Patient Satisfaction Survey (1-5 Scale)

Patient Satisfaction Press Ganey



Ability to schedule SMA

Satisfaction with primary provider

Did you feel additional benefit from the SMA Visit?

Would you recommend an SMA to other patients?

Will you participate in another SMA?

Verbatims

- Thank you, I am aware of what my numbers mean and excited to have some ideas
- My daughter gained insight into my diabetes !!!
- "...hear from others who share the same concerns that you may have.
- Exposed to options that have proven **successful and useful for others**"
- "Things come up in discussion that I would not have thought to ask"**
- "Best of both worlds. Still have time with doctor, but learn lots of info"
- Feel empowered and not alone.
- One-on-ones are great - but being in a room with other patients with the same issues is not only comforting but educational."

Outcomes

- ↓ Days wait by 20-50%
- ↓ BMI, A1c
- ↑ Inc use of recommended medications
- ↑ Patient satisfaction (appt. when wanted and visit)
- ↑ High provider satisfaction
- ↑ Increasing visit volume

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Cleveland Clinic
Shared Medical Appointments
Shared learning for a healthier future

2017 SMA Patient Satisfaction Survey

Provider Name: _____

Date of Shared Medical Appointment: _____

Please respond to each question about your recent Shared Medical Appointment by circling the appropriate number.

1. Scheduling my Shared Medical Appointment was easy.

Strongly Disagree	Disagree	Neutral	Agree	Strongly Agree
1	2	3	4	5

Comments: _____

2. I gained valuable information from responses to other patients' questions.

Strongly Disagree	Disagree	Neutral	Agree	Strongly Agree
1	2	3	4	5

3. There was adequate time for my questions.

Diabetes value

Educational areas:

- nutrition
- exercise
- medication use
- symptoms
- comprehensive care recommendations



What didn't work

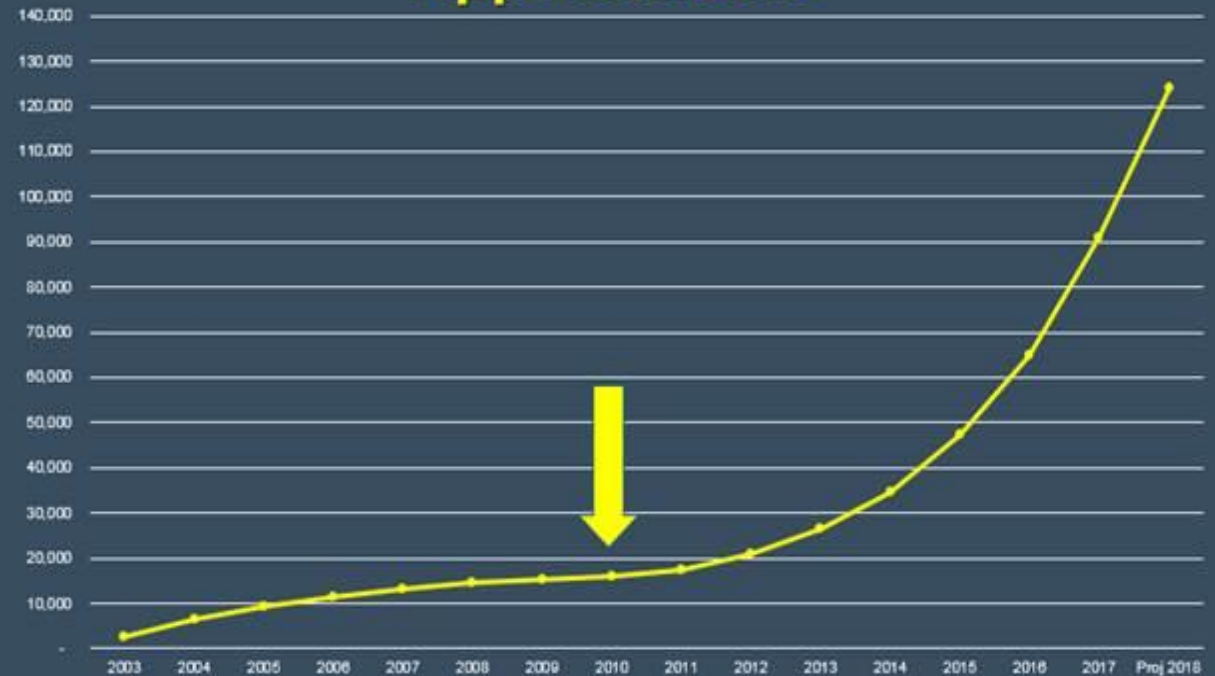
- Excluding clerical staff
- Not having core staffing
- Facilitator integration and guidance
- Doing as needed
- Single disease, single provider SMA
- Seeing as a class or curriculum
- ***Doing too much !!!!***

Take-aways

- *Consistent support*
- *Optimization of workflows (huddle)*
- *Data and feedback: hurdles and success*
- *Multiple areas impacted*
- *Benefits: quality and access*
- *Patients like it:*



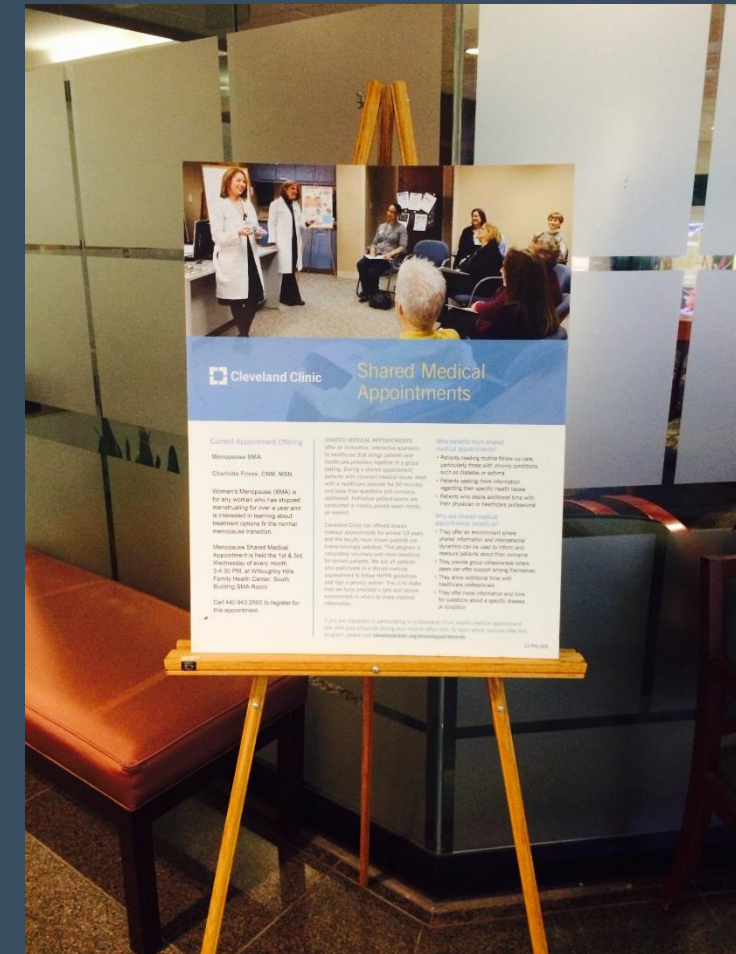
Cumulative Shared Appointments



1600% growth

Next Steps...

- Build an SMA team
- Clear schedules and develop the appointment
- Add value.....
- Create your recruitment plan
- Design forms and surveys for the SMA
- Promote meetings, staff meetings
- Commit to 6 months !!!!



Traditional and New can Intersect



Chihuly in the Garden

Marianne Sumego: sumegom@ccf.org
Anne Maggiore: maggioa2@ccf.org

AUGUST 2018 MONTHLY WEBINAR

- **Date/Time:** Thursday, August 16, 2-3pm Eastern
- **Topic:** Diabetes and Obesity
- **Presenter:** Tim Garvey, M.D. of University of Alabama Birmingham



QUESTIONS?

