Driving Clinical Transformation in a Practice Setting with Health Information Technology

Learning Guide Executive Summary

The increase in health IT adoption brings with it both opportunities and challenges in transforming primary care delivery. With new EHR-based tools to use information within the practice, as well as access to information about care that occurs beyond their clinic walls, providers are adapting their practice workflows in order to better care for their patients. Clinical transformation and performance improvement as supported and driven by health IT are key areas of focus for all Beacon Communities. This Learning

> A Learning Guide describes a promising IT-enabled intervention that can be deployed in a community to accelerate health care transformation.

Guide distills the experiences and lessons learned from Beacon Communities[1] as they engaged practices, assessed readiness, considered practice transformation models, and collaborated on the effective deployment and use of health IT in their communities. The Learning Guide is designed for individual practices, communities, and learning collaborative organizers that are interested in using transformation models and health IT to improve practice performance and care management.

Inside the Learning Guide

Setting the Stage for Success. The Beacon Communities' vision of transforming the health of communities through technology made them early adopters in the transformation of primary care. Their work can be instructive to a single practice, a small group of practices, or a group of community stakeholders (including multiple practices, hospitals, and other stakeholders, such as laboratories and long-term care facilities). In considering a primary care transformation initiative, the Beacon Community experience highlights several key considerations, including: identifying assets and strengths as well as key areas for improvement; ensuring sufficient local broadband capability to effectively support health

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[1] The Beacon Communities who contributed to this Learning Guide are: Bangor Beacon Community, (Maine), Colorado Beacon Consortium, San Diego Beacon Community (California), Hawaii Island Beacon Community, Central Indiana Beacon Community, Beacon Community of the Inland Northwest (Washington), Crescent City Beacon Community (Louisiana), Greater Cincinnati Beacon Collaboration (Ohio), Greater Tulsa Health Access Network Beacon Community (Oklahoma), Southeast Michigan Beacon Community, Western New York Beacon Community, Keystone Beacon Community (Pennsylvania), Southeast Minnesota Beacon Community, Delta BLUES Beacon Community (Mississippi), Rhode Island Beacon Community, Southern Piedmont Beacon Community (North Carolina), and the IC3 Beacon Community (Utah).

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IT; clearly communicating expectations for participation with stakeholders; and building on the efforts of early adopters.

Lessons from the Beacon Community Experience. The Beacon Communities represent a vast array of experiences with the use of technology to support clinical transformation. Differences in their experiences stem from many factors, such as the existing health IT infrastructure in the clinical practice and community, the extent of health system integration, the level of maturity with health information exchange, the community's goals and objectives, the readiness of the clinical practices to change, and the presence of informal and formal leadership. The lessons and insights from these communities are presented in the form of five Learning Guide Implementation Objectives:

1. **Establish Goals and Confirm Value Proposition.**

This section emphasizes the importance of establishing clinical transformation goals that are aligned with organizational goals, while also confirming the value proposition for the work. These priorities help establish the focus and buy-in that will increase the likelihood of team success. The Beacon Communities' experiences underscored the need for each team to align clinical transformation with internal organizational goals and external requirements and confirm the value proposition.

2. **Develop a Culture of Continuous Quality Improvement.**

The ultimate aim of clinical transformation is to improve the health of populations through more cost-effective systems of care. Technology can be a key resource for fostering a culture of continuous improvement in the clinical practice. In building a culture of continuous quality improvement, communities and practices should focus on goal-setting, forming an interdisciplinary improvement team, training staff on improvement methods and tools, and testing and ongoing evaluation of change ideas to refine the change before moving to scale.

3. **Consider Models and Methods for Facilitating Clinical Transformation.**

Practices participating in clinical transformation initiatives must also consider the combination of models and methods that will help them reach their goals. This section reviews models for facilitating clinical practice transformation, such as embedded care managers and practice coaches, and methods for collaborative learning and improvement such as *The Breakthrough Series*[2] model, transparent sharing of measure results, clinical network meetings, web and action series, and challenges.

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[2] *The Breakthrough Series: IHI's Collaborative Model for Achieving Breakthrough Improvement.* IHI Innovation Series white paper. Boston: Institute for Healthcare Improvement; 2003. (Available on www.IHI.org)

4. Optimize the Use of Health IT to Support Clinical Transformation.

Clinical practices seeking to optimize their use of health IT will need to adopt the appropriate analytic tools to improve care delivery. The exchange of data and health information about the patients and population served can offer many insights to providers. The Beacon Community experience identified several key steps for using technology to support clinical transformation:

1) Optimize EHR usage within the practice and through working with vendors
2) Assess data integrity
3) Empanel patients and optimize registry functions
4) Implement workflow changes
5) Provide report and query management
6) Analyze data
7) Promote transparency and feedback
8) Use health information exchange capabilities to communicate across the medical neighborhood

5. Support Patient Engagement Through the Use of Health IT.

One of the most exciting frontiers in clinical transformation is the role technology can play in engaging patients. Patients who are self-activated and empowered to self-manage have better outcomes. Technology is increasingly providing new opportunities for substantive engagement of patients and families to empower them to better manage their health care conditions and overall well-being. This section includes an overview of Beacon patient engagement technologies, including mobile texting, in-home monitoring, use of iPads and VOIP, and patient portals.

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The full Learning Guide is available at http://www.healthit.gov/policy-researchers-implementers/beacon-community-program/learning-guides