Training and Workflows for End Users

February 23, 2017
12:00 p.m. – 1:15 p.m. ET
Meeting Information

- Conference Line: 1-866-269-6685
- Conference Code: 6763836672#
- Reminders:
  - Please **hard-mute your computer speakers** and the speakers in the web conference
  - Please **mute your phone line** when you are not speaking to minimize background noise
- Technical difficulties? Email us at [chpinfo@academyhealth.org](mailto:chpinfo@academyhealth.org)
Chat Feature

- To share your comments using the chat feature:
  - Click in the chat box on the left side of your screen
  - Type into the dialog box and click the send button

- To signal to presenters you have a question / comment:
  - Click on the drop down menu near the person icon and choose *raise your hand*
We are All In!

COMMUNITY HEALTH PEER LEARNING PROGRAM
NPO: AcademyHealth, Washington DC
Funded by the federal Office of the National Coordinator
10 Participant (planning) & 5 SME communities

BUILD HEALTH CHALLENGE
Funded by 10 national & local funders (including Advisory Board, de Beaumont Foundation, the Colorado Health Foundation, The Kresge Foundation and Robert Wood Johnson Foundation)
18 implementation and planning awardees

DATA ACROSS SECTORS FOR HEALTH
NPO: Illinois Public Health Institute in partnership with the Michigan Public Health Institute
Funded by the Robert Wood Johnson Foundation
10 grantees

THE COLORADO HEALTH FOUNDATION: CONNECTING COMMUNITIES AND CARE
Funded by the Colorado Health Foundation
14 collaborations
All In: Data for Community Health

1. Support a movement acknowledging the social determinants of health

2. Build an evidence base for the field of multi-sector data integration to improve health

3. Utilize the power of peer learning and collaboration
Learning Objectives

▪ Hear three *All In* communities share best practices in approaching information systems training for end users in clinical and social service settings.

▪ Discuss ongoing challenges and lessons learned in work flow implementation.

▪ Provide an opportunity for participants to ask questions and dialogue with one another about challenges and opportunities.

▪ Identify opportunities for next steps/continuing the conversation.
Presenters

Allison C. Kenty
Director of Marketing and Communications
HealthInfoNet

Sharon Bearor
Clinical Educator, HealthInfoNet

Nate Tyler
Chief Operating Officer, Simply Connect

Meghan LaMacchia,
Implementation and Account Services, ACT.md

Susan Richardson
Research Specialist, Vermont Child Health Improvement Program
Training & Workflow

Working Together Toward Successful Information System Adoption

Sharon Bearor, RN, BSN
Clinical Educator

Allison Kenty
Director, Communications and Marketing
HealthInfoNet & DASH

HealthInfoNet is Maine’s statewide Health Information Exchange

- **DASH Project**
  - Working with an ACO composed of 2 CAHs, 7 FQHCs, 2 CAPs to incorporate SDOH in the HIE & Predictive Analytic tool.
  - Through the use of analytics, ACO members will work to reduce hospital/ED admissions and readmissions.
Analytics Training

**Challenge:** Develop a training program around the HIN Analytics Tool, train ACO members on 4 workflows that accomplish DASH goals.

**Starting Point:**

- No formal training approach, materials
- 1 staff person knowing the tool
- Internal training for Clinical Educator, Director of Client Services, Communications Director
- Develop training program based on user roles
- Develop supporting materials
Understanding the Scope

• Understand Project Scope (HIN Analytics)
• Scheduled meetings with Project Team
  – Administration/Project Manager
  – Clinical Staff
  – Technical Resources
• Discussion of goals and timelines
Understanding the Team

• Know the team
  – Roles/ Responsibilities
  – Patient panel and type of practice

• Understand the current work flow and processes
  – Role of the care manager/team
  – Managing their at-risk population

• HIE Audit
  – HIE usage statistics
  – Identify and work to close any education gaps

• Support & Philosophy
  – “I work for and with you” attitude
  – Support throughout the entire process (before-during-after)
Training Preparation

• Outline the expectations
  – Time, technical needs, space

• Participants (Who \textit{needs} to be at the table)
  – Managers
  – RN’s
  – MA’s

• Log-in credentials provided

• Prepare educational materials
  – Printed guides
  – Web resources
Training

• Set-up and log-in
• Introductions
  – Roles
• Presentation
  – Goals (DASH)
  – Workflow examples
• Live Demonstration
  – Show their patient population
Follow-Up

• Post-Training Communication
  – 2 weeks after training
  – Usage Audit
  – Verify connection for all users
  – Understand barriers, concerns
  – Coach

• Monitor usage
  – Send emails to keep in touch
  – Provide additional training as necessary
Best Practices

• Get to know the team/develop relationships
• Meet them where they are
• Use real case studies to relate to their specific clinical setting
• Connect with others; share best practices
• Offer CEU for trainings if possible
Challenges

• Technical implementation completed
• Resources
  – 1 trainer for Analytics & HIE
• Maine
  – Large, rural Northern New England state
• In-person training vs. virtual webinars
• Shoulder-to-shoulder with Analytics users
  – Spend time in their work environment
  – Understand workflows
Lessons Learned

• Be flexible
• Understand this is another new change and process; be patient and understanding
• Point Person (Super User)
  – Buy-in and continued enthusiasm
• Consistent follow-up critical to success
  – Post implementation project meetings
Thank you!
Integrating Electronic Shared Plans of Care into Clinical Workflow
February 23, 2017
VCHIP at University of Vermont
electronic Shared Plan of Care (e-SPoC)

Our Families & Family Health Partners

Vermont Department of Health

Patient-Centered Medical Homes

VCHIP at University of Vermont
Data Flow Diagram: electronic Shared Plan of Care
Integrating new HIT

Susan Richardson, Research Specialist
Vermont Child Health Improvement Program

Meghan LaMacchia, Implementation and Account Services
ACT.md
Workflows

The “who, what, where, when and how things get done in your clinic. This includes both clinical and administrative work.” –AHRQ Health IT Tools and Resources Workflow Assessment

- Our Focus
  - How does care coordination happen in your clinic now
  - Highlight areas where new HIT will change/add to workflow
START

Conduct previsit planning

Patient comes into office for visit

Patient has existing care coordination

*Introduce ACT.md

Patient is new to care coordination

Refer patient to CHT in EHR

Schedule in-person patient visit (Care Coordinator)

Pt referred to CHT SW and/or CSHN SW

Care Coordinator meets with pt/family

Enroll family in e-SPoC

Care Plan copied into ACT.md

Create Care Plan with pt/family in EMR

PCP signs off on care plan

Share Care Plan with pt/family

Revised Care Plan copied into ACT.md

Parent asked to comment on Care Plan in ACT.md

PCP signs off on revised care plan

Revise Care Plan per pt/family request (as needed)

*This type of box signifies a step in your care coordination process that will potentially involve e-SPoC.

This type of dashed line signifies a step in your care coordination process that does not always happen, but happens sometimes.
Challenges we faced:

- Different roles = different perspectives
- Big picture vs Little Picture

How we overcame them:

- Review workflow with multiple users
- Group time for big picture review
- Site visits to troubleshoot procedural issues
Training and Support

- Pre-launch: Demo Site
- At-the-elbow training
- Zoom training (online)
- Webinars
- Training Content Development
- Other

ACT.md project space
Training and Support

Challenges we faced:
• External Provider engagement

How we overcame them:
• Explain the value
• Provide user specific training content
• Personalization
• Constant follow-up
Lessons Learned

Workflow
• Take the time to know what you are doing now
• Gather multiple perspectives on workflow

Training
• Formal monthly meetings/practice visits
• Superusers
Resources

- AHRQ Workflow Assessment for Health IT Toolkit
  https://healthit.ahrq.gov/health-it-tools-and-resources/workflow-assessment-health-it-toolkit
- ACT.md
  http://act.md/
  http://act.md/product/care-coordination-record/
Event Notification

Patient/Person Receiving Services
[With a PHR]

Event Driven Bi-Directional & Actionable Communications

Clearly Defined Care Team

Clearly Defined Events

- Life Events
- Gen. Change
- Med Errors
- Adv. Reaction
- Coercive Sex
- Illness
- Accident
- Hospitalization

- ER Visit
- Exploitation
- Injury
- Depression
- Abuse
- Srvc Barrier
- Behavior Chng
- Aggression
Areas of focus

- Change Management Activities
- Training
- Reinforcing Desired Behavior
Change Management

• Ensure each stakeholder group understood the ‘why’
• Demonstrate the wins for each group required to take action
• Create champions at each organizational level
Training: College of Direct Support
Connect with Us!

- **Continue the conversation on the online platform**
- **Sign up for news from *All In***
- **Contact information for speakers**
  - Sharon Bearor - [sbearor@hinfonet.org](mailto:sbearor@hinfonet.org)
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  - Meghan LaMacchia - [meghan@act.md](mailto:meghan@act.md)
  - Nate Tyler - [nate.tyler@simplyhie.com](mailto:nate.tyler@simplyhie.com)
- **Evaluation**

- **A resource list, slides, and recording will be available**