Change Idea Presentation/Exercise: Systematic Caseload Reviews (SCR) (Care Coordination Clinical Team Meetings)

July 23rd, 10:15-11:30am

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Learning Objectives

Conducting Systematic Caseload Review team meetings to systemically review care coordination caseload using population management principles to assess and adjust care for patients with complex conditions.

• Identify at least three approaches to holding care coordination meetings for clients with complex conditions.
• CCC teams will develop structure, identify participants and initial schedule for their CCC population-based care coordination meeting(s).
• Teams will share “Systematic Caseload Review” team meeting strategies with other CCC teams.
Overview of Session Process

• **(15 min)** Goals and elements of CC Systematic Caseload Review (CC-SCR) meetings

• **(30 min)** Teams design CC-SCR meeting structure and process for their partnership

• **(20 min)** Report out on teams’ CC-SCR plans—how will you test and modify, if needed?

• **(10 min)** Teams identify/make adjustments in CC-SCR plan based on ideas from prior discussion
Types of CC Meetings

Effective communication requires various kinds of meetings. Today we are focused on CC-Systematic Caseload Reviews. Here are some examples of other CC meeting types:

Table 1: Example Clinical Meeting schedule for non-co-located Integrated care teams.

<table>
<thead>
<tr>
<th>Meeting Type</th>
<th>Frequency</th>
<th>Patient / Consumer</th>
<th>Care Coordinator</th>
<th>PCP</th>
<th>Nurse</th>
<th>SU</th>
<th>Counselor</th>
<th>Medical Consultant</th>
<th>Psychiatric Consultant</th>
<th>Others</th>
</tr>
</thead>
<tbody>
<tr>
<td>Daily Medical Huddle</td>
<td>Daily</td>
<td>(x)</td>
<td></td>
<td></td>
<td>x</td>
<td>x</td>
<td></td>
<td></td>
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<td></td>
</tr>
<tr>
<td>Care Coordination Meeting</td>
<td>Weekly</td>
<td>x</td>
<td></td>
<td></td>
<td></td>
<td>x</td>
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<tr>
<td>Systematic Caseload Review</td>
<td>Weekly</td>
<td>x</td>
<td></td>
<td></td>
<td></td>
<td>x</td>
<td></td>
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</tr>
<tr>
<td>CD Caseload Review</td>
<td>Monthly</td>
<td>x</td>
<td></td>
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<td></td>
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<td></td>
<td></td>
<td></td>
<td>MH Case Manager Family / Advocate Psychiatrist Peer Counselor</td>
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<tr>
<td>Multidisciplinary Meeting</td>
<td>Quarterly</td>
<td>x</td>
<td>x</td>
<td>x</td>
<td>x</td>
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</table>
Elements of/Conducting CC-SCR Meetings

Key Principles of CC-SCR Meetings

- **Population-based**: Assure all patients in a given population or caseload receive systematic care oversight and necessary care coordination.

- **Treat to target**: Use structured data (such as PHQ nine scores or be the most recent blood pressure) to guide us in selecting patients for discussion.

- **Evidence-based**: Use evidence to guide decisions re: how the care plan should be adjusted. ‘Evidence’ could be know effective treatments, or information obtained from the team/CC, consumer or family.
Doing Population-Based Care in a CC-SCR Meeting—How is it Different?

- Identify population using registry or spreadsheet
- Establish process for who gets discussed...how many clients?
- Structure for CC-SCR case review—what gets discussed?
- Technology and space for meeting
- Who needs to be present routinely?
  - medical expertise (Psychiatrist and Primary Care MD)
  - Care Coordinator
  - Other Providers?
  - Note: Patients/significant others would participate in individual Care Conferences
- Results—Recommendations (based on Treat to Target/Evidence) and how are CC-SCR results shared?
Teams design CC-SCR meeting structure and process for their partnership (30 min)

Use the CC-SCR Planning Worksheet (in packet)

1. Who will routinely attend the CC-SCR meeting?
2. How often? Where? How long?
3. Who runs the meeting?
4. Logistics: What do you need for space, telephone, computers, etc?
5. What patient information will you bring to the meeting? A registry/spreadsheet? Patient files?
6. Who takes notes?
7. How will recommendations be communicated to care providers and incorporated in CC Plan?
8. How can you test CC-SCR plan prior to full implementation?
Report Out and Discussion of Teams’ CC-SCR Plans

• Briefly describe your planned CC-Systematic Caseload Review process
  – Structure, use of registry or spread sheet, frequency, participants, communicating results, etc...

• What challenges do you anticipate?

• How might you test and then implement using PDSA Cycles?
Teams identify/make adjustments in CC-SCR plan based on full group discussion.

- In the next 10 minutes, discuss and add to your worksheet any changes that you may want to make to your CC Systematic Caseload Review plan.