Collaborating in Improving Population Health: Developing and Evaluating a Population Health Management Curriculum

US Department of Veterans Affairs
Centers of Excellence in Primary Care Education (COEPCE)

2017

Collaborating Across Borders VI

Banff, Canada
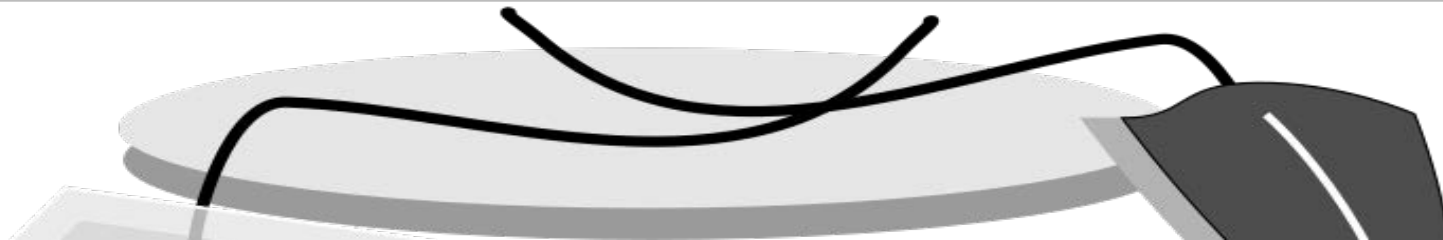
Stand Up
Check In
(get handouts)

Group Quiz

Question 1: Mr. J is a 65 yo male with T2DM (Hgb A1c 8.5 on 10/2016) and HTN. You saw him in March and ordered labs. In April, you finally get results and the A1c is 9.8. You ask your nurse to schedule him into a group visit.
What best describes this approach?

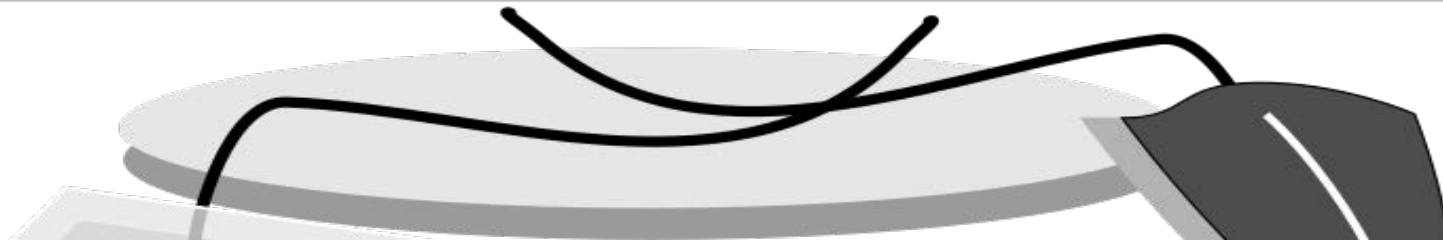a) Panel management
b) Alert management

Group Quiz

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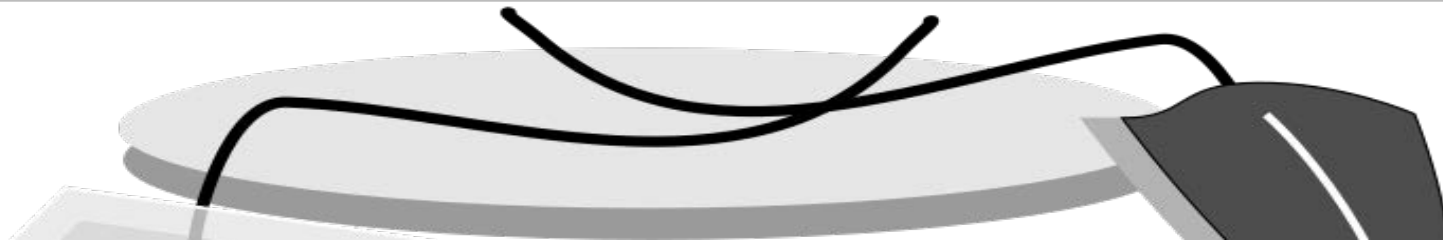**What best describes this approach?**

a) Panel management
b) **Alert management**

Group Quiz

Question 2: Which profession below has panel management language in accreditation documents?
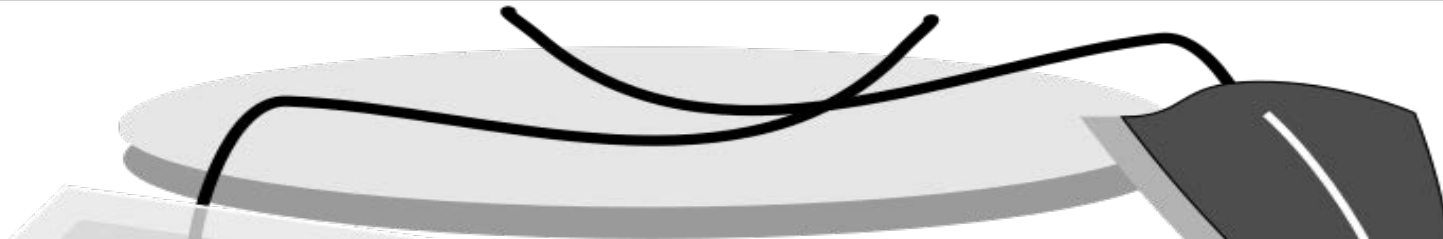
a) Pharmacy ACPE Standard 2
b) Psychology APA Cluster 5
c) Social Work CSWE Competency 9
d) All of the Above

Group Quiz

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d) **All of the Above**

Workshop Overview

- Overview (and definition!) of population health/panel management
- Curriculum development to date
- Small groups
  - Instructional Strategies
  - Assessment of Learners
- Wrap up

Panel Management Shared Definition

- The tools and processes for identifying patients in a primary care practice with unmet preventive and chronic care needs and working systematically as a team to address these needs
  - ➢ Individual Patients
  - ➢ Populations
  - ➢ Guidelines
  - ➢ Teamwork
  - ➢ Improvement
- Shared definition guided 2 ½ year collaborative effort of COEPCE Performance Improvement Workgroup

Objectives

- **What should we know? (Learning Outcomes)**
  - ➢ Consensus definition of panel management
  - ➢ COE's PM curriculum development to date

- **How do we teach it? (Instructional strategies)**
  - ➢ Optimal learning activities that lead to desired outcomes and allow observation of trainee behaviors
  - ➢ Develop approaches to implementation challenges

- **How will we know what is learned? (Assessment)**
  - ➢ Have plan for systematic assessment of learners and evaluation of population health management curriculum

Learning Outcomes

Instruction

Assessment
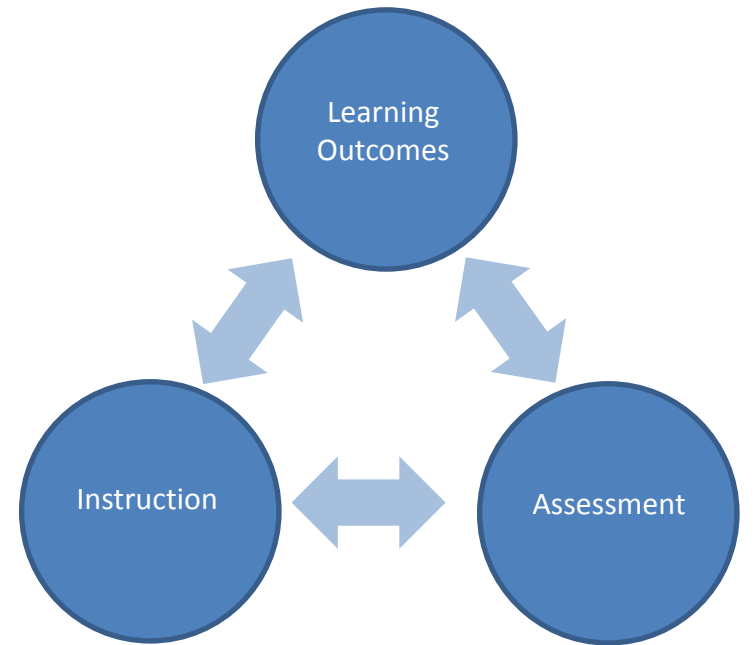
Panel Management Curriculum Development

- Identified and adapted Englander and IPEC 2016 competencies

- Wrote desired learning outcomes (DLO) for each competency

- Used developmental continuum
  - novice, advanced beginner, competent, and proficient

- Iteratively adapted DLO language for interprofessional learners
 - *Handout #1 – Panel Management Desired Learning Outcomes*

Learning Outcomes

Instruction

Assessment
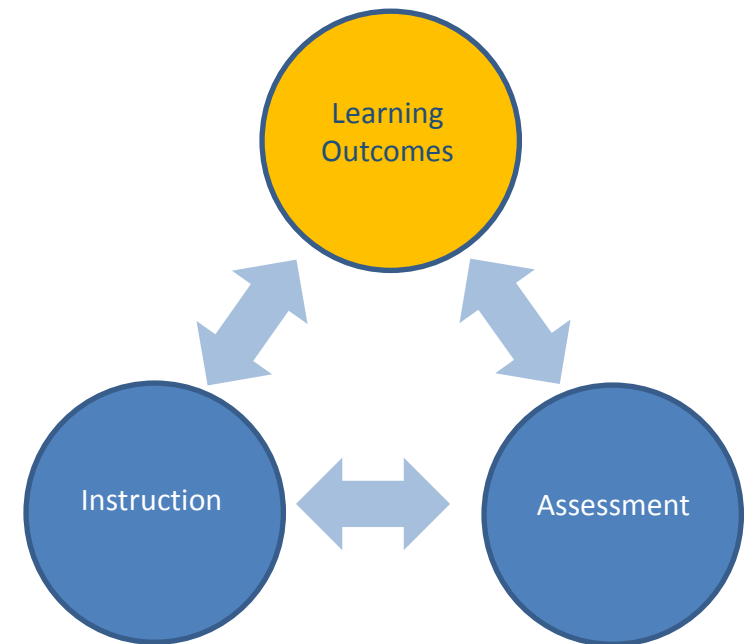
Handout #1 – PANEL MANAGEMENT DESIRED LEARNING OUTCOMES – DOMAINS AND LEVELS

	Level 1 - Novice	Level 2 – Adv. Beginner	Level 3 - Competent	Level 4 - Proficient
Individual patients	(1) Identifies own panel or team's panel and patients on those panels who are not meeting specific population-appropriate measures	(2) Demonstrates skills for accessing panel data/reports (as system allows) and is prepared to participate in panel data review with interprofessional team (3) Identifies patients within team's panel who are highest risk for adverse outcomes	(4) With input from team members, prioritizes and justifies approach to addressing gaps in care for individual patients using a patient-centered approach that is sensitive to the patient's context (5) Uses databases to identify patients with chronic disease or preventive care gaps to address overall population health of team's panel	(6) Leads and coaches others in developing panel management skills (7) Offers meaningful suggestions for improvement of (or participates in development of) the dashboard or panel management tools
Population	(8) Demonstrates how to access panel management data/reports (9) Explains how population care differs from individual disease care	(10) Identifies causes for not reaching population performance goals and identifies an approach to address some of these causes	(11) Uses panel management data/reports to monitor progress on desired performance metrics	(12) Identifies root causes for not reaching performance goals and routinely addresses causes (13) Develops realistic goals for improvement in care for specific disease/condition population metrics over time
Guidelines & Measures	(14) Identifies and describes chronic disease and preventative care performance measures for specific populations (i.e. diabetes, heart failure, chronic pain)	(15) Locates current chronic disease and preventive measure guidelines for common conditions in healthcare setting (16) Relates health system performance measures to guidelines	(17) Interprets current chronic disease and preventive measure guidelines for common conditions in healthcare settings and applies guidelines to the care of individual patients	(18) Describes various approaches to developing chronic disease and preventive medicine guidelines including risk of bias in determining performance measures
...ork	(19) Identifies members of the panel management team	(20) Describes profession-specific panel management responsibilities for each interprofessional team member	(21) Performs profession-specific roles and responsibilities in interprofessional team panel review meetings, including leadership role when appropriate (22) Engages interprofessional team members	(24) Elicits and engages interprofessional team members in brainstorming specific interventions for most challenging patient populations (25) Identifies and recruits additional

Small Group Breakouts

- What should we know? (Learning Outcomes)
- **How do we teach it? (Instructional strategies)**
  - ➢ Optimal learning activities that lead to desired outcomes and allow observation of trainee behaviors
  - ➢ Develop approaches to implementation challenges
  - ➢ *Handout #2 – Instructional Strategies*
- How will we know what is learned? (Assessment)
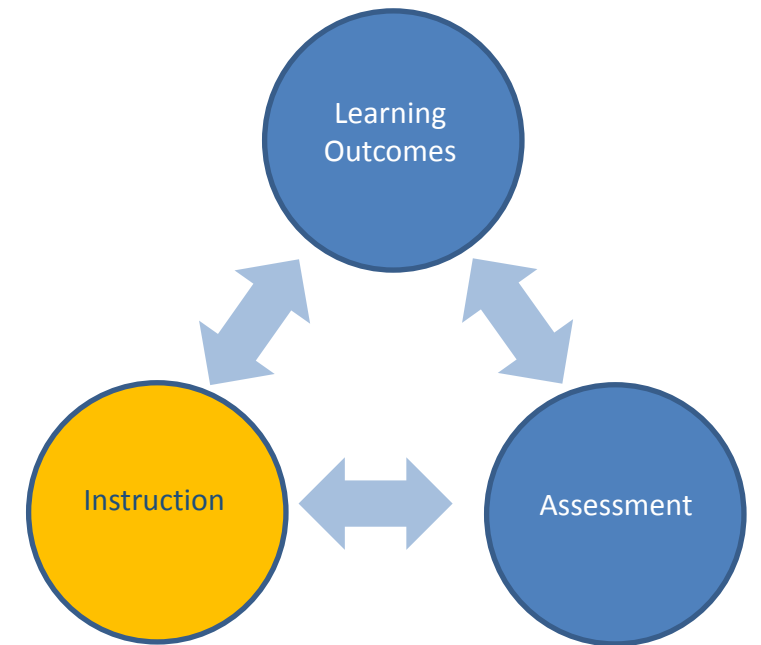
Handout #2 – Instructional Strategies

Examples of Panel Management Instructional Strategies Used by VA Centers of Excellence in Primary Care Education

Site	Typical #/ Type of learners in session	Setting	Faculty	Health Conditions/ Performance Measures Addressed	Tools/Teaching strategies
BOI	**12 Total** *(5 MD, 2 NP, 3 Pharm, 2 Psych)*	• Staffing room in clinic	1 MD 1 NP 1 Pharm 1 RN	• DM • Opioid Safety • End of year transition	• Interprofessional teaching quick topics • Registry demonstration and consult • Team time to work with RN and other clinic staff • Telephone time
CLE	**10 Total** *(6 MD, 2 NP, 1 Pharm, 1 Psych)*	• Computer lab • Conference room	1 MD 1 Pharm 1 Psych	• Admissions • DM • HTN • ED utilization • Obesity	• Chart Review Tools • Excel Tracking Worksheets • Practice Improvement Plans
SEA	**10 Total** *(3-5 MD, 1-4 NP, 2 Pharm, 1 Psych)*	• Computer lab • Library classroom with multiple computers	1 MD 1 NP 1 Pharm 1 RN (variable)	• DM • HTN • ED utilization • Obesity • Opioid Safety • Tobacco Cessation	• Overview of topic; rationale for session; current literature • Instruction/demonstration: data acquisition and interpretation, chart review • Chart Review Tool • Case presentations • Construct Pareto chart • Discussion of individual-focused action plans • Identify system resources for care/disease management

SF	**10 Total** *(3 MD, 3 NP, 3 Pharm, 1 Psych)*	• Computer room
		• Conference room
			1 MD
			1 NP
			1 Pharm
			1 MD chief resident
			1 Psych (variable)
				• DM
				• HTN
				• ED utilization
				• Opioid safety
				• CHF
				• COPD
				• Medication Safety
					• Excel Tracking Worksheets
					  - Highlight systems resources, guideline based care
					  - Some worksheets shared by professions, some profession specific
					• Flipped classroom – teaching pearls from trainees
					• Time to collaborate with interprofessional trainees and staff

	8 Total	• Conference room			

How do we teach it:
1/2/Share on Instructional Strategies (Activity #1)

- ***Instructions for One/Two/Share***

- ***One*** *- Thinking about Desired Learning Outcomes (DLO's) for Population Health/Panel Management curriculum, please fill out the worksheet below for your current (or planned) setting.*

- ***Two*** *- After you have completed this, chose a person from a different profession or location to share your proposed instructional strategies.*

- ***Share*** *- Following this, we will debrief as a group.*

Fill out on your own…

Trainees involved: __ Nurse Practitioner __ Pharmacy __ Physician __ Psychology __ RN __ Social Work
Other: _____

Level of training: __Classroom/prelicensure __ Clinical/prelicensure __ Postlicensure

Location of training: __ Didactic/Lecture __Small Group __ Simulation __ Workplace learning

Physical location of training: __ Lecture hall __ Small group setting ___ Computer training room ___ Clinical setting

Population (what is the disease state or population of patients of focus?) _____

Empanelment method (how will you "assign" a list of patients to each trainee to be reviewed?)
_____

Pick 2 rows, fill out, then share…

Based on this setting, please list an instructional strategy to achieve the DLO/Performance Assessent FOR ONLY TWO OF THE ROWS BELOW:

Performance Assessment statements (representing focused DLOs)	Instructional Strategy	Barrier(s)
EXAMPLE: *Analyzes clinical performance data to identify individuals with care gaps in panel population*	*Provide trainees with a list of their assigned patients diabetes quality metrics from the electronic health record*	*Identifying a list of "assigned" patients for pharmacy and psychology trainees is difficult, as they don't have specifically empaneled patients.*
Reviews clinical performance reports to monitor progress on key performance indicators		
Elicits and integrates patient's context and preferences when making care recommendations for individual patients		
Applies current evidence and guidelines to populations with chronic diseases and preventive care needs		
Uses findings from panel management to initiate quality improvement work with interprofessional team members and other		

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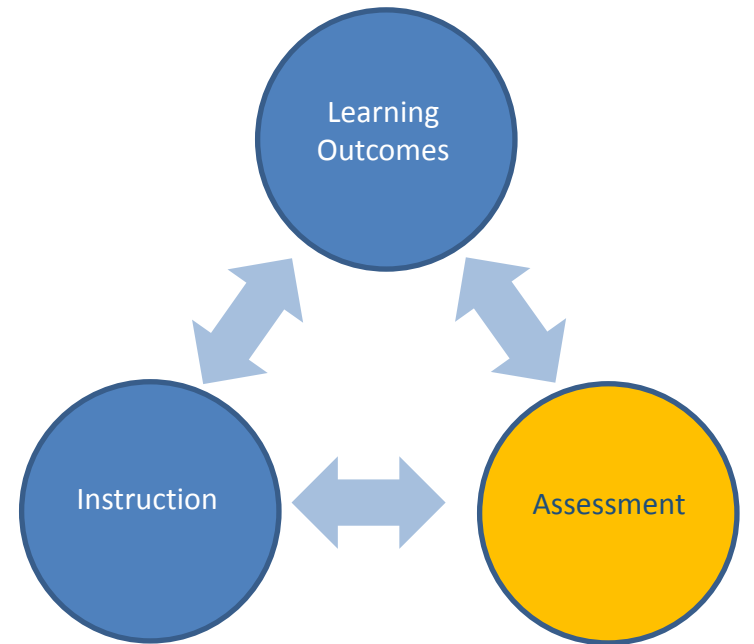- ***Share*** *- Following this, we will debrief as a group.*

How will we know: Assessing our learners and evaluating our curriculum

Kirkpatrick model:

- Level 1: Satisfaction
- Level 2: Knowledge
- Level 3: Behaviors
- Level 4: Pt Outcomes

Measurement:

Minute papers

~Self-monitoring

Direct-observation

Patient measures

How do we assess it?
Evaluating learners' behaviors during PM activities

- Meet your avatar learner (handout)
  - ➢ Assign an Avatar!
  - ➢ Listen to avatar's recent experience with panel management
  - ➢ Feel free to ask questions!

- Use Direct Observation tool (handout) to rate your avatar learner
  - ➢ What behaviors does your avatar reflect?

Wrap Up

Please complete Minute Papers!

CoE Performance Improvement Workgroup

PIWG Representatives

- Maya Dulay, MD – San Francisco VA/UCSF

- Anne Poppe, PhD, MN, RN – VA Puget Sound HCS/University of Washington

- Pete Spanos – Cleveland VAMC/Case Western Reserve University

- William G. Weppner, MD, MPH – Boise VAMC/University of Washington

- Danielle Wojtaszek, PharmD – West Haven VAMC

Thanks to Judith Bowen, MD, PhDc –Oregon Health Sciences University

And Joyce Wipf, MD – VA Puget Sound HCS/University of Washington