Creating Patient-Centered Team-Based Primary Care

August 13, 2015
3:00–4:00 p.m. EDT
Janice Genevro, Ph.D.
Health Scientist
Agency for Healthcare Research and Quality
I. Welcome, background, and acknowledgements (5 minutes)

II. Overview of white paper: “Creating Patient-Centered Team-Based Primary Care” (10 minutes)

III. Panel discussion (40 minutes)

IV. Wrap-up (5 minutes)
Overview and Resources

- White paper will be available this fall at [www.pcmh.ahrq.gov](http://www.pcmh.ahrq.gov)
  - Presents framework and strategies for adopting a patient-centered approach to planning and delivering team-based care
  - Based on literature and input/interviews with experts
  - Other resources on patient engagement and primary care also are available at [www.pcmh.ahrq.gov](http://www.pcmh.ahrq.gov)
Thanks to our Technical Expert Panel

- **Susan Edgman-Levitan**, P.A., Executive Director, John D. Stoeckle Center for Primary Care Innovation and Massachusetts General Hospital
- **Amy Edmondson**, Ph.D., A.M., Professor of Leadership and Management, Harvard Business School
- **Soma Stout**, M.D., Lead Transformation Adviser, Cambridge Health Alliance and Executive External Lead, Institute for Healthcare Improvement
- **Jessie Gruman**,* Ph.D., President and Founder, Center for Advancing Health
- **Jeannie Walker McAllister**, M.S., M.H.A., Associate Research Professor of Pediatrics, Indiana University School of Medicine, Indiana Children's Health Services Research
- **Holly Miller**, M.D., M.B.A., Medical Director, Taconic IPA
- **Pamela Mitchell**, Ph.D., M.S., Past President, American Academy of Nursing, and Executive Associate Dean, University of Washington School of Nursing
- **Ron Stock**, M.D., M.A., Associate Professor of Family Medicine, The John Kitzhaber, M.D., Fellow in Health Policy, The Foundation for Medical Excellence; and Director of Clinical Innovation, Oregon Health Authority Transformation Center, Oregon Heath & Sciences University
- **Jennifer Sweeney**, M.A., Vice President, National Partnership for Women and Families

*Deceased July 2014.*
Thanks to Our Other Contributors

- **Kathy Hutcheson**, M.B.A., M.S., Consumer Engagement Coordinator, Aligning Forces for Quality (AF4Q) – South Central Pennsylvania
- **Phyllis Kaye**, M.P.A., PEK Consulting
- **Judith Schaefer**, M.P.H., Senior Research Associate at MacColl Center/GroupHealth Research Institute
- **Southcentral Foundation Team:**
  - **Steve Tierney**, M.D., Medical Director
  - **Thomas Mitchell** (Nurse Case Manager)
  - **Matai Manu** (Certified Medical Assistant/Manager)
  - **Guil Prickette** (Behavioral Health Consultant)
  - **Adrienne Tveit** (Pharmacist)
  - **Brandi Hennard** (Registered Dietician)
  - **Darius DiMascio** (Case Management Support)
  - **April Kyle** (Customer-Owner)
II. Overview of White Paper

Lisa Schottenfeld, M.P.H., M.S.W.
Health Research Analyst
Mathematica Policy Research
Team-Based Care and Patient-Centered Care

- **Team-based care:** “The provision of health services to individuals, families, and/or their communities by at least two health providers who work collaboratively with patients and their caregivers – to the extent preferred by each patient – to accomplish shared goals within and across settings to achieve coordinated, high-quality care.”¹

- **Patient-centered care:** “Care that is relationship-based with an orientation towards the whole person, and that includes partnering with patients and their families to understand and respect each patient’s unique needs, culture, values, and preferences.”²

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The Issue

- Why do we need to ensure that team-based care is actually patient-centered?

Concerns:

- Difficulties coordinating care across multiple team members
- Communication challenges, so that not all members are well informed about a patient’s medical history, values, and preferences
- Loss of relational continuity between patient and providers
- Focus on building team structures can distract from a focus on delivering patient-centered care
1. Adopt a patient-centered approach to planning and delivering care
   - Helps promote a culture in which provider teams prioritize relationship-building with patients, view patients as partners in care, and seek patients’ input

2. Build structures and processes so teams will be coherent and identifiable to patients
   - Enables patients and provider teams to effectively partner with each other
Strategies for Adopting a Patient-Centered Approach

• Engage patients in setting practice-level policies and procedures
  ▶ Patient advisory councils, patient partners, surveys
• Develop and implement philosophy of care
  ▶ Use to inform decisions and human resources policies
• Hire team members who match philosophy of care
  ▶ Incorporate patient-centeredness into job descriptions
  ▶ Hire from communities served
• Prepare provider teams to apply philosophy of care
  ▶ Training on shared decisionmaking, cultural competence, etc
• Create infrastructure to support ongoing learning
  ▶ Define and track measurable outcomes
Strategies for Creating Teams to Provide Patient-Centered Care

• **Develop team coherence**
  - Promote respectful and egalitarian working relationships and processes
  - Define roles and standard work procedures while encouraging flexibility
  - Create written and verbal information-sharing structures

• **Ensure teams are identifiable to patients**
  - Introduce patients to team members and explain roles
  - Create visual cues
  - Reiterate “teamness” to patients
  - Use “warm handoffs” between providers
III. Panel Discussion

Dana Petersen, Ph.D., M.P.H.
Senior Health Researcher
Mathematica Policy Research
Moderator
Our Panelists

Jonathan Sugarman, M.D., M.P.H.
President and C.E.O.
Qualis Health
Our Panelists

Pamela Mitchell, Ph.D., M.S.
Executive Associate Dean
University of Washington
School of Nursing
Our Panelists

Jennifer Sweeney, M.A.
Vice President
National Partnership for Women and Families
Why is it important for practices transitioning to team-based care to consider what it means to provide patient-centered care as a team, as well as the steps they can take to provide this kind of care?
Can you describe an example of a practice that successfully engaged patients in its transition to team-based care (or in efforts to improve team-based care)? What steps did they take to make sure that patients were meaningfully involved?
The paper discusses several strategies to help achieve strong communication among team members. In your experience, what techniques have been most successful for encouraging effective communication?
What steps can practices take to successfully bring front-office staff onto the provider team? In practices that employ dietitians, care coordinators, or other staff who might not work within the practice full-time, how can these individuals be fully integrated into the team?
What are some strategies for helping teams develop and sustain more egalitarian approaches to decision making during the provision of care and other processes?
One strategy discussed in the paper involves training team members in how to invite and be responsive to the needs and preferences discussed by patients. In your experience, what types of training have you seen be most successful in helping team members better provide patient-centered care?
Dana Petersen, Ph.D., M.P.H.
Senior Health Researcher
Mathematica Policy Research
Moderator
V. Wrap-Up: Janice Genevro, AHRQ

• Key points from the discussion
• Join our Practice Facilitation (PF) community:
  Sign up for AHRQ’s biweekly primary care practice facilitation newsletter at
  https://pcmh.ahrq.gov/page/practice-facilitation
• Stay tuned for the paper!
  http://www.pcmh.ahrq.gov/page/patient-centered-care