Scaling up the Patient’s Medical Home
IN THE CALGARY ZONE

PCN Strategic Forum: February 7-8, 2020
Dr. Christine Luelo, Kari Remington, Peter Rymkiewicz
Faculty/Presenter Disclosure

• **Faculty:** Dr. Christine Luelo, Kari Remington, Peter Rymkiewicz

• **Relationships with financial sponsors:**
  - **Profit or not for profit employer:** Primary Care Networks (Dr. Christine Luelo, Peter Rymkiewicz)
  - **Profit or not for profit employer:** Primary Health Care Opioid Response Initiative (Dr. Christine Luelo)
  - **Profit or not for profit employer:** Alberta Medical Association (Kari Remington)
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OVERVIEW
SCALING UP

1. BACKGROUND >>
2. IN THE ZONE
3. GETTING STARTED
4. WHERE ARE WE NOW?
5. MAIN THEMES
6. MOVING FORWARD
7. QUESTIONS
1. BACKGROUND
LOCAL TO ZONAL

- Historically local solutions for local problems
- BUT common problems need common solutions
- “Standardization through collaboration”
- 2012 Calgary Zone Primary Care Action Plan
- 2016 GREAT relationships! But an emerging need to retrofit in order to continue to grow
- “New” provincial governance structure introduced in 2017
1. BACKGROUND
ELEVATION DAYS

Elevation Day I: May 2018

- **Vision:** A healthcare system centred around the Patient’s Medical Home enabling coordinated and continuous care

- **Mission:** Better together – leveraging our strengths and sharing our resources, to better serve patients through the Patient’s Medical Home

- **Values:** Accountability, collaboration, respect, patient-centered

- **Strategic principles**
1. BACKGROUND

ELEVATION DAYS

Elevation Day II: June 2019

- Operational change
- Zone Service Plan
1. BACKGROUND
CALGARY ZONE STRUCTURE

ZONE OPERATIONS
COORDINATING COMMITTEE

CALGARY ZONE
PCN COUNCIL

ZONE CO-CHAIRS

ZONE OPERATIONS
COORDINATING COMMITTEE

TASK GROUP CHAIRS

ZONE ADVISORY GROUP
Quarterly advisory role

Includes:
- AHS leads
- DFM
- MDs
- EDs
- Others

- Medical Home
- Supported Transitions
- Specialty Integration
- Other grant work

Zone Operations
Director
1. BACKGROUND
ZONE PLANNING

Zone Service Plan

- Submitted September 2019
- What did we agree to?
2. IN THE ZONE
TASK GROUPS

- **Patient’s Medical Home** task group:
  - Operations lead (e.g. Executive Director)
  - Patient voice
  - Physician voice
  - Representation from all PCNs (different roles)
  - Alberta Health Services
  - Alberta Medical Association (Zone Lead, EQuIP, pan-PCN practice facilitator group)
  - Project management support
3. GETTING STARTED
GOAL SETTING

- We thought big! For example, harmonizing composition of team, access etc.
- Landed on foundational work – panel and capacity for improvement
  - How does my patient move through the system?
  - Which patients are most at risk?
  - Culture of improvement: How is it defined?
  - What is our status now?
  - How would we measure our progress?
3. GETTING STARTED
SMART GOALS

Project objective: “To harmonize implementation of the Patient’s Medical Home by standardization of tools and resources across the Zone”

Goals:
- 1. 90% of Calgary Zone physician clinics will have established panels
- 2. Calgary Zone PCNs will agree on operational definition of ‘capacity for improvement’
3. GETTING STARTED

SMART GOALS

- 1. 90% of Calgary Zone physician clinics will have established panels
- 2. Calgary Zone PCNs will agree on operational definition of ‘capacity for improvement’
3. GETTING STARTED

OVERVIEW

• **Current state assessment:**

  Patient's Medical Home task group; advised by EQuIP
  
  - Objectives: Determine each PCN’s current state re paneling and capacity for improvement; baseline data for measurement
  
  - Questions re PCN demographics, panel readiness, capacity for improvement

*(Continued on next slide)*
(Continued: Current State Assessment)

- Worked together to determine questions; attempted to use objective measures
- Distributed Sept-Oct 2019
- Analyzed by task group
- Results shared with PCNs (opportunity for explanation, updates)
- Results shared with Zone Operational Coordinating Committee
4. WHERE ARE WE NOW?

OVERVIEW

- 1. Complete survey
- 2. Review results
- 3. Implementation and change management plan
4. WHERE ARE WE NOW?
INFORMING STRATEGIC PLANNING

- Measurement of paneling / capacity for improvement & activity
- Variation in results
- Validity and reliability
- Some findings
4. WHERE ARE WE NOW?
INFORMING STRATEGIC PLANNING

- Measurement of paneling / capacity for improvement & activity
- Variation in results
- Validity and reliability
- Some findings
### 4. WHERE ARE WE NOW?

**BY THE NUMBERS**

<table>
<thead>
<tr>
<th>Element</th>
<th>Bow Valley PCN</th>
<th>Calgary Foothills PCN</th>
<th>Calgary Rural PCN</th>
<th>Calgary West Central PCN</th>
<th>Highland PCN</th>
<th>Mosaic PCN</th>
<th>South Calgary PCN</th>
<th>Total Calgary Zone PCNs</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Total # of physician members</strong></td>
<td>55</td>
<td>483</td>
<td>157</td>
<td>466</td>
<td>71</td>
<td>359</td>
<td>260</td>
<td>1851</td>
</tr>
<tr>
<td><strong>Total # of Nurse Practitioner</strong></td>
<td>0</td>
<td>3</td>
<td>1</td>
<td>0</td>
<td>0</td>
<td>9</td>
<td>0</td>
<td>13</td>
</tr>
<tr>
<td><strong>Total # of family docs with panel</strong></td>
<td>42</td>
<td>364</td>
<td>136</td>
<td>367</td>
<td>62</td>
<td>252</td>
<td>237</td>
<td>1460</td>
</tr>
<tr>
<td><strong>Total # of Pediatricians with panel</strong></td>
<td>1</td>
<td>1</td>
<td>2</td>
<td>31</td>
<td>2</td>
<td>9</td>
<td>7</td>
<td>53</td>
</tr>
<tr>
<td><strong>Total # of NPs with panel</strong></td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td><strong>Total # of clinics (Medical Homes)</strong></td>
<td>10</td>
<td>95</td>
<td>39</td>
<td>141</td>
<td>22</td>
<td>99</td>
<td>63</td>
<td>469</td>
</tr>
</tbody>
</table>
4. WHERE ARE WE NOW?

PCN EMRs

Proportion of physicians by EMR use in the Calgary Zone

- **Telus Wolf**: 33%
- **Telus Med Access**: 24%
- **Telus PS Suite**: 11%
- **Accuro**: 16%
- **Healthquest**: 1%
- **Other EMR**: 5%
- **Paper chart (no EMR)**: 3%

Proportion of Physicians
4. WHERE ARE WE NOW?
PANELING, VALIDATION, ENGAGEMENT

- Proportion of physicians with 80% validated rate or higher
- Proportion of physicians with a validation rate less than 80%
- Proportion of physicians who indicate they are working on paneling however validation rates not measured or not available
- Proportion of physicians not engaged in paneling or status unknown
4. WHERE ARE WE NOW?

PANEL

Proportion of physicians with a process in which a patient verifies relationship to physician

<table>
<thead>
<tr>
<th>Azalea</th>
<th>Begonia</th>
<th>Carnation</th>
<th>Daffodil</th>
<th>Daisy</th>
<th>Iris</th>
<th>Lilly</th>
<th>Calgary Zone PCNs</th>
</tr>
</thead>
<tbody>
<tr>
<td>31.7%</td>
<td>81.2%</td>
<td>96.9%</td>
<td>96.6%</td>
<td>77.0%</td>
<td>97.7%</td>
<td>51.7%</td>
<td></td>
</tr>
</tbody>
</table>

Proportion of physicians with a process in which a physician verifies relationship to the patient

<table>
<thead>
<tr>
<th>Azalea</th>
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<th>Daisy</th>
<th>Iris</th>
<th>Lilly</th>
<th>Calgary Zone PCNs</th>
</tr>
</thead>
<tbody>
<tr>
<td>30.7%</td>
<td>0.0%</td>
<td>0.0%</td>
<td>0.0%</td>
<td>0.0%</td>
<td>0.0%</td>
<td>20.5%</td>
<td></td>
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</tbody>
</table>
4. WHERE ARE WE NOW?
CAPACITY FOR IMPROVEMENT

Workforce: Calgary Zone

- Total # of Practice Facilitators: 24
- Total # panel support: 144
- Total # of EMR IT staff: 46
- Total # of other change agent staff (e.g. evaluators, researchers): 16
- Total # of PCN physician champions in a formal position: 21
4. WHERE ARE WE NOW?
CAPACITY FOR IMPROVEMENT

Workforce: By PCN

- Total # of Practice Facilitators (or similar role)
- Total # panel support (Panel managers, POETs, PCCs PCCEs, etc.)
- Total # of EMR IT staff (support panel, eg data cleaning, setting up flags, etc.)
- Total # of other change agent staff (staff hired to support quality improvement, e.g. evaluators, researchers)
- Total # of PCN physician champions in a formal position
4. WHERE ARE WE NOW?

QUALITY IMPROVEMENT

Proportion of physicians involved in QI activities from Jan 1 to October 1st 2019

- Azalea: 56%
- Begonia: 85%
- Carnation: 77%
- Daffodil: 84%
- Daisy: 18%
- Iris: 77%
- Lilly: 44%
- Calgary Zone PCNs: 18%
5. MAIN THEMES
DATA ANALYSIS

- Trust is foundational
- A current state assessment is an engagement strategy
- More points of divergence than convergence
- Engagement ≠ measurable outcomes
- Our data showed we need to step back and work together to define our standards, tools, measurement approach
6. MOVING FORWARD
CO-DESIGN

Implementation and Change Management Plan

- Build on the good that we are already doing
- Reduce divergence
- Standardization through collaboration
- Working together
- Alignment with other Zone working groups
- Zone Service Plan – stay within PMH objectives
- Create standards that allow measurement of progress within Zone
- Change management and communication tactics
7. QUESTIONS
SCALING UP
Thank you

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