

WELCOME

Enhanced Care Management Webinar Fridays

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**We will begin at
12:03p.m.**

Thank you



L.A. Care
HEALTH PLAN[®]

For All of L.A.

ECM Webinar Fridays: The Assessment and Care Plan in ECM – Practical Strategies

February 25, 2022

Presented by:

**L.A. Care Health Plan | Health Net
Anthem Blue Cross | Blue Shield Promise Health Plan | Molina**

LA1263 0422



Housekeeping

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Webinar Overview

Topic	Time
Welcome & Introductions	5 minutes
Health Plan Updates	5 minutes
The Assessment and Care Plan in ECM: Practical Strategies	45 minutes
Summary and Q&A	5 minutes



The Assessment and Care Plan in ECM Practical Strategies

Guest Speakers:



Laura Collins, LICSW
Senior Consultant
Health Management
Associates



Karen Hill, PhD, ANP-C
Senior Consultant
Health Management
Associates



Cindy Toledo, LCSW
Clinical Social Worker II
L.A. Care



Objectives for this Session

At the end of this webinar, you will be able to:



Review best-practice content for completing the comprehensive assessment and care plan in the ECM Benefit



Describe the importance of collaborative, person-centered and strengths-based documentation that involves the patient in both the assessment and care planning process



Understand the effectiveness in utilizing motivational interviewing approaches in engaging the patient in their care while assessing and developing the care plan



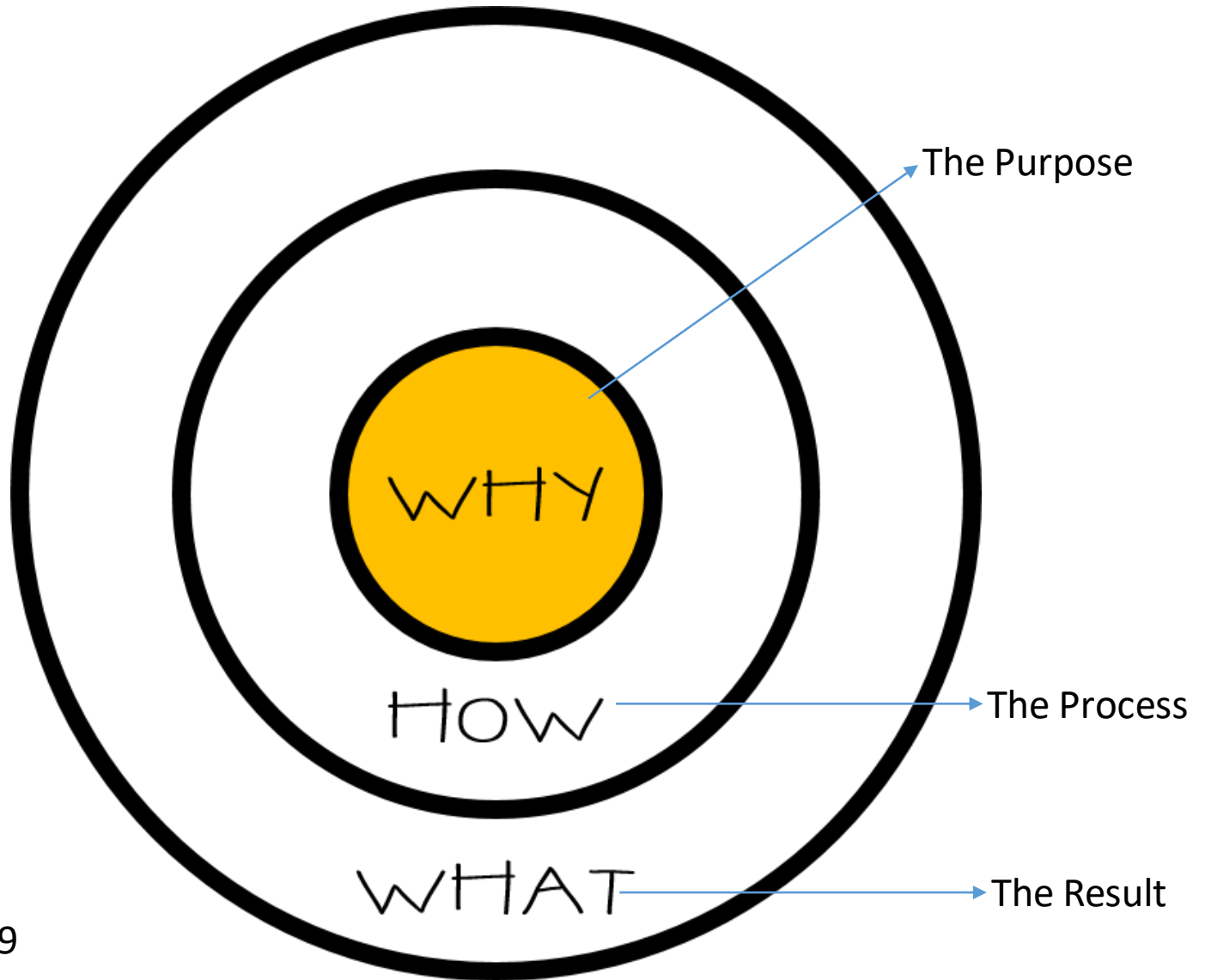
A top-down view of a light-colored wooden desk with various medical supplies. In the upper center is a white computer keyboard. To the left is a silver stethoscope. To the right are surgical forceps and a reflex hammer. In the lower right is a white pen and a syringe. The background is a soft-focus image of these items.

Today's Agenda

- 1. Overview of the standardized content for the ECM Comprehensive Assessment and Care Plan**
- 2. Discuss the “how” of this work, including strategies during COVID**
- 3. Using Motivational Interviewing techniques to engage patients in the assessment and care planning process**



The Golden Circle



Sinek, 2009

{ #START WITH THE WHY }

A **comprehensive assessment** that covers the “whole person” is important because...

Type your answer into the chat



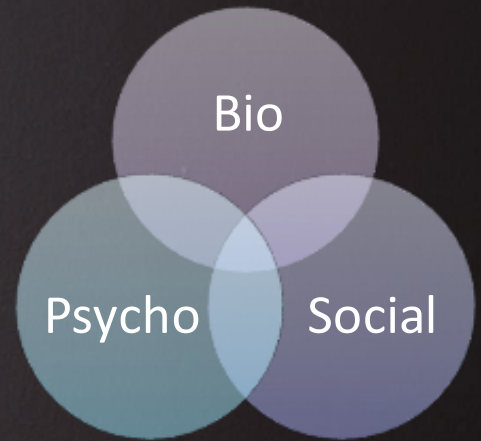
THE WHY, continued



Involving the patient in the development of the **care plan** is important because ...

Type your answer into the chat





Today's What:
The
Comprehensive
Assessment &
Care Plan



What is your Comfort Level Completing a Comprehensive Assessment with your new ECM Patients?



Poll Question

- A. To be honest, it always feels awkward to ask some of the more personal questions**
- B. It sometimes feels OK, especially if I already know the patient**
- C. Most of the time I feel comfortable asking these questions**
- D. I feel very comfortable and skilled in asking all the questions in the comprehensive assessment**
- E. *Other comments – Chat In!***



The ECM Comprehensive Assessment

Starting with an *introduction statement* that highlights the importance of the patient's role in the ECM benefit:

By participating in the Enhanced Care Management benefit, you are committing to partnering with me in your care

Our team is here to provide support to help you work towards your health and social goals;

We will work with you to help you develop your own management of your health and daily life.

Today and over the next 1-3 visits, we will complete this assessment together,

and from there develop goals and next steps that support your overall health and wellness.

The ECM Comprehensive Assessment

Engagement Questions: Purpose/Meaning and Strengths

Ask 3 or more of these during or at the end of the assessment

1. How strongly do you agree with this statement? **I lead a purposeful & meaningful life.**

2. **Strengths:** What is something that you are good at or really proud of?

3. **Self-Efficacy:** How confident are you in taking actions needed to maintain or improve your health?

4. **Coping Skills:** When you feel sad or worried, what helps you feel better? What do you do for fun or to relax?

5. **Problem-Solving:** When you had a difficult situation in the past, what did you do?

6. **Motivation:** What do you want to improve about your health? Why do you want to improve your health?



The Assessment: Covering all the Domains

Beliefs that Drive Approach to Care

- *Do you have any **cultural, religious and/or spiritual beliefs** that are important to your family's health and wellness?*

Health Literacy Questions

- *Do you need help taking your medicines?*
- *Do you need help filling out health forms?*
- *Do you need help answering questions during a doctor's visit?*



The Assessment: Physical Health

Ask about...

Ask the patient to rate their own health and compare to 1 year ago

Emergency room, hospital, nursing home and rehab visits in the last 6 months

Which providers/treatment they have been receiving (or may need), including dental, and OB-GYN (if pregnant), eye exams, wound care

Medical conditions (long list provided), including trouble with vision, hearing, swallowing

Preventative Care – vaccinations, screenings/tests (including labs)



The Assessment: Covering all the Domains

Medications & Pain – Ask about...

What **medications** the patient is taking. Has the patient had trouble filling these?

People sometimes miss taking their medications. Thinking over the past week, were there any days you didn't take your medications as prescribed? What gets in the way?

Would the patient like assistance with taking their medications as prescribed?

Does the patient experience **pain**, and if so how much does it interfere with the patient's normal activities?



The Assessment: Covering all the Domains

Activities of Daily Living (ADL's) – Ask...

Do you need help with any of these actions?

Including bathing, eating, making meals, shopping, toileting, walking, housework, going out for visits, using the phone, tracking appointments

Do friends or family members express concerns about your ability to care for yourself?



The Assessment - Behavioral Health

Mental Health & Substance Use

- **Mental Health Assessment Questions, starting with**
 - *Have you ever been told by a healthcare or mental health professional that you have a mental health diagnosis?*
 - ***Patient Health Questionnaire (PHQ – Depression)***

PHQ-2 plus Question 9

Over the last two weeks, how often have you been bothered by any of the following?

1. Have you experienced a reduction in interest or pleasure in doing things?

Not at all Several days More than half the days Nearly every day

2. Have you felt down, depressed or hopeless?

Not at all Several days More than half the days Nearly every day

3. (Q.9) Thoughts that you would be better off dead or of hurting yourself in some way

Not at all Several days More than half the days Nearly every day

- *Pay close attention to question 9 and seek supervision or consultation for further evaluation of suicide risk*

*Remember to
consult – safety
first!*

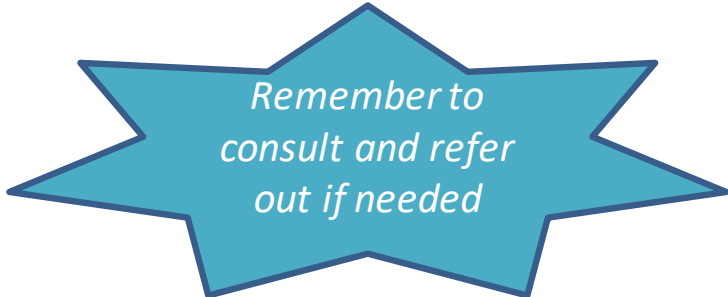


The Assessment - Behavioral Health

Mental Health & Substance Use

Mental Health Assessment Questions, including

- **Anxiety, Trauma and Stressor questions**
 - *Anxiety and Stress happens when someone feels tense, nervous, anxious, or can't sleep at night because their mind is troubled. How stressed are you?*
 - *Sometimes things happen to people that are unusually or especially frightening, horrible, or traumatic (examples listed) – have you every experienced events such as these or others in your life?*
- **Substance Use**
 - Asking about the patient's experience with and use of alcohol, nicotine, marijuana & other substances - *Would you like to talk with someone about this use, especially if you are thinking about quitting or cutting back?*



Remember to
consult and refer
out if needed



The Assessment - Behavioral Health

Cognitive and Developmental factors

•Cognitive Functioning – with prompts as to next steps

- Changes in thinking, remembering, or making decisions
- *In the past month, have you felt worried, scared or confused that something may be wrong with your mind or memory*

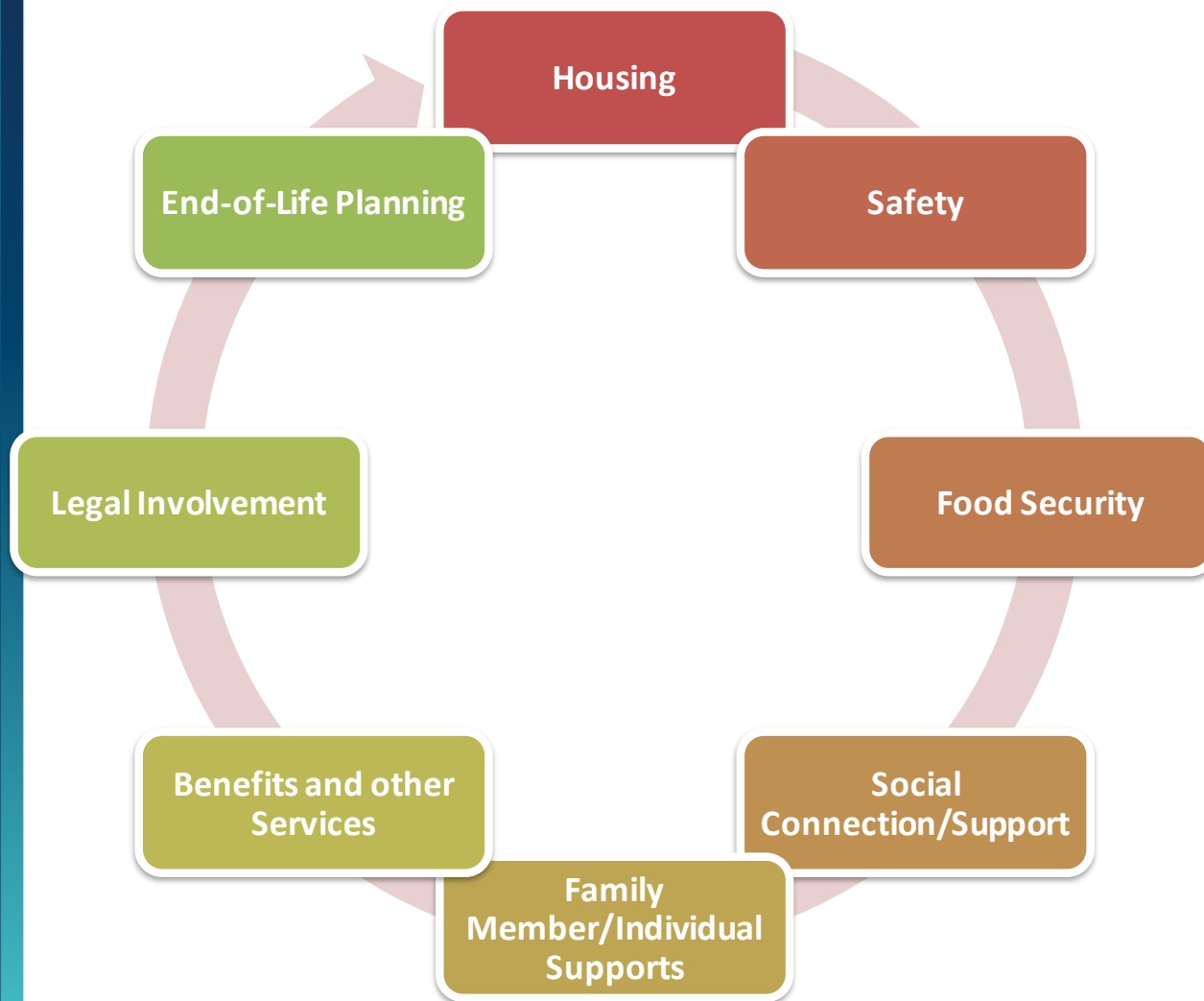
Developmental info – if not already available to the ECM Team

- Asking the patient or caregiver/family member about a developmental delay, intellectual disability or brain injury
 - Includes Autism Spectrum Disorder, ADHD, Learning Disabilities



The Assessment – Covering all the Domains

Social Determinants of Health (SDoH)



What are Social Determinants of Health (SDOH)?



Social determinants of health are the conditions in the environments where people are born, grow, live, learn, work, play and age that affect a wide range of health, well-being, functioning, and quality-of-life outcomes and risks.

The Assessment – The Summary

Concluding with the Patient's Priorities and Next Steps

What concerns you most about your physical or mental health?
What is one thing you would like to do right now to improve your health (such as cutting back on caffeinated or sugary drinks? – <i>provide easy, harm reduction examples</i>)
What would you like to achieve from our work and time together?
From our meeting today what comes to mind as your top 2-3 goals for your health, wellness and social and/or living situation for the next 3-6 months?

Narrative Summary

<i>Include Primary Needs identified from Assessment:</i>	
Next Steps	Person Responsible
1.	
2.	
3.	
Next Appointment/Location:	



The Care Plan



What are your challenges and strategies in completing a Care Plan with your ECM Patients?

Poll Question – check all that apply



- A. Some of my patients simply can't come up with a goal**
- B. I struggle with the fact that the patient's goals are not necessarily health-focused**
- C. It's very hard to refine the goal to be SMART with the patient**
- D. I find if we focus on smaller, more achievable goals then we get somewhere – it's just a slow process that requires patience**
- E. *Other comments – Chat In!***



The Care Plan – Meeting the DHCS Requirements

Highlighting – Patient & Team involvement, Strengths, Needs, Preferences

Enhanced Care Management Care Plan Template		
Initiation Date:	Current/Updated Care Plan Date:	Last Review Date:
Initial Care Plan developed within 60 Days of Enrollment? <input type="checkbox"/> Yes <input type="checkbox"/> No		
Input from the <input type="checkbox"/> Patient <input type="checkbox"/> Family Member <input type="checkbox"/> Guardian <input type="checkbox"/> Caregiver <input type="checkbox"/> Authorized Support Persons		
Care Plan Shared with: <input type="checkbox"/> Patient <input type="checkbox"/> Family Member <input type="checkbox"/> Guardian <input type="checkbox"/> Caregiver <input type="checkbox"/> Authorized Support Persons <input type="checkbox"/> Care Team <input type="checkbox"/> PCP or other Provider		
Patient Strengths :		
Patient Identified Needs :		
Patient Risks/Gaps in Care /Barriers :		
Recommendations for Service Needs:		
Patient Stated Goals/Preferences :		



The Evolving Care Plan using the Problem, Goal and Intervention (PGI) Format



Start Date	Problem	SMART Goal (<i>Specific, Measurable, Achievable, Realistic, Time-Bound</i>)		
Intervention/Action Steps		Assigned To/Responsible Party	Due Date	Completion Date
Notes (Including Outcomes)				

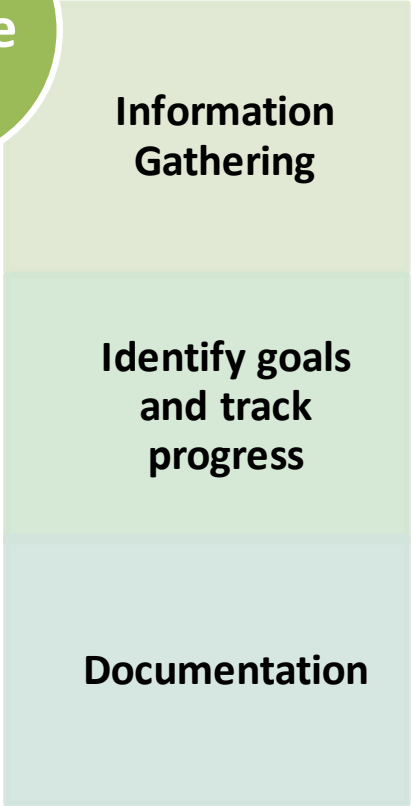
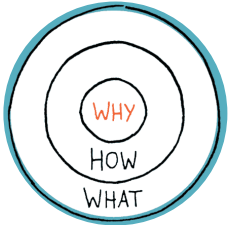
Think about patient-voice when identifying the problem and articulating the goals



The HOW



How to Assess: Science and Art



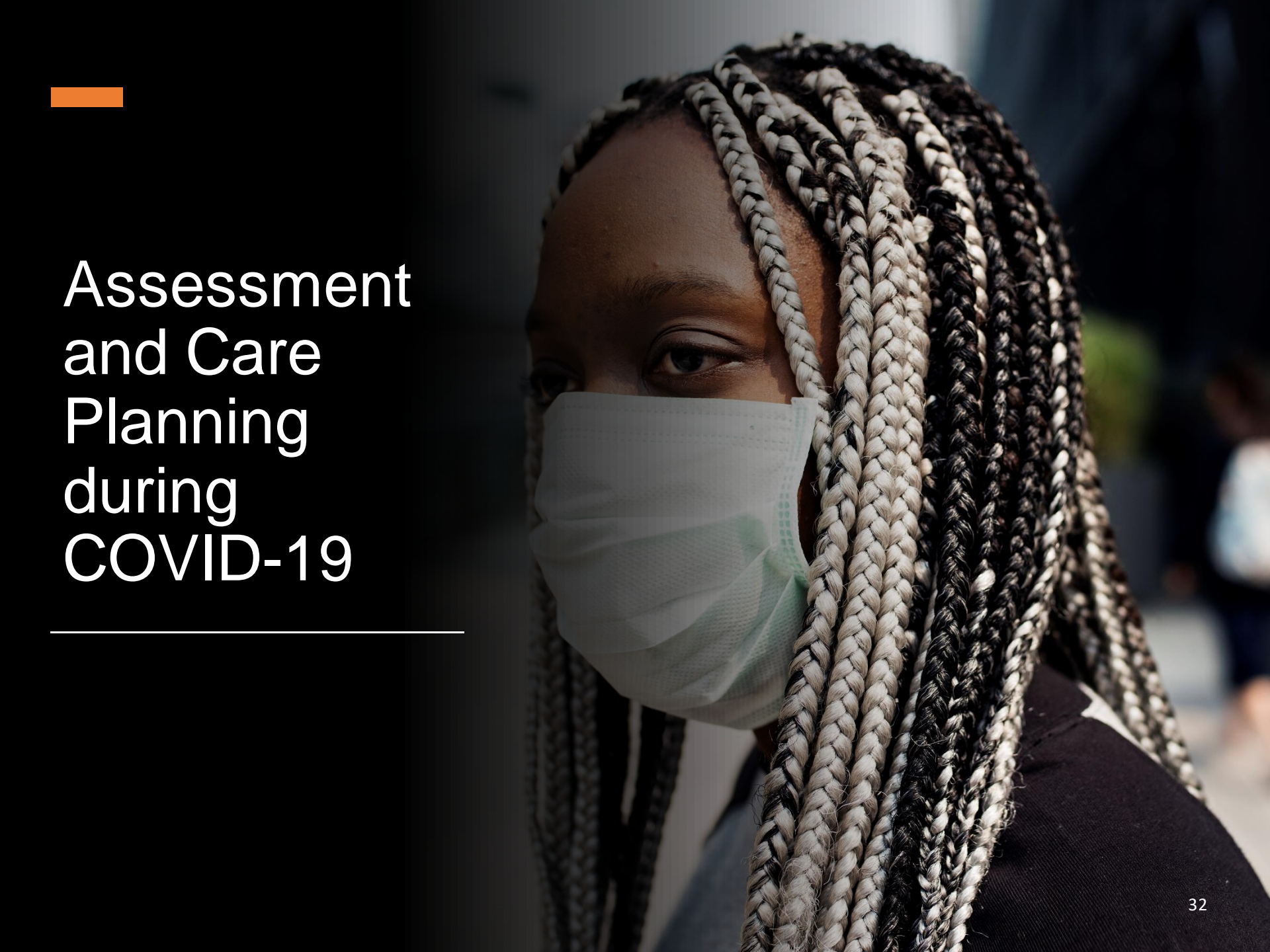
Person-First Language Examples

Lack of family/social support – “I don’t have any family or anyone able to help me”

Income instability – “I’ve run out of money to pay for food, bills, and medicine”

PHQ-9 score is 15 – “I just feel down, and I can’t get motivated”



A close-up photograph of a woman with dark skin and long, thick braids. She is wearing a white surgical-style face mask that covers her nose and mouth. Her eyes are looking slightly to the left of the camera. The background is blurred, suggesting an outdoor or public setting. In the top left corner, there is a small orange horizontal bar.

Assessment and Care Planning during COVID-19

What are your strategies for completing the assessment and care plan during COVID?



Using the Assessment as an Engagement and Retention tool Starting with the Spirit of Motivational Interviewing (MI)

Imagine yourself in the patient's shoes and how it feels to be meeting a new person for the first time, knowing they are collecting lots of sensitive information about you.



Motivational Interviewing: Using OARS to Engage the Patient During the Assessment and Care Plan

- An **Affirmation** that would highlight the patient's strengths – some examples
 - For the Assessment
 - I appreciate that it must have taken a lot of courage to talk about your drinking habits today
 - For the Care Plan:
 - You completed all the tasks we discussed this week, which I know wasn't easy – that was a big assignment!
 - I see you are working really hard to change your routine at home
- **What affirmations have you used with your patients?**

Type your answer into the chat!



OARS

Using **Summary** to inform the Assessment & Care Plan

Steps

1. Announce that you are about to summarize
 - *“Let me stop and summarize what we’ve just talked about”*
2. Summarize the main theme
 - *“We’ve covered a lot but I’m hearing the main thing on your mind is keeping your apartment right now”*
 - *“You’re also worried about the fact that you are having trouble with your vision and haven’t wanted to go to a doctor to be checked out”*
3. Include both sides of the ambivalence about changing
 - *“At the same time, you mentioned that you’ve had some nagging thoughts of your own about your physical health, including your vision”*
4. Invite the person to correct anything missed
 - *“Did I miss anything?”*
5. Encourage continued conversation
 - *“Is there more?”*



Summary of Today's Session

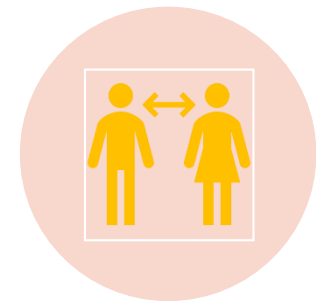
Engaging our patients in the assessment and care planning process



**BEST-PRACTICE
DOCUMENTATION IS PATIENT-
CENTERED, STRENGTHS-BASED
AND IN THE PATIENT VOICE**



**COLLABORATIVE
DOCUMENTATION IS CRITICAL
TO THE DEVELOPMENT OF A
COMPREHENSIVE ASSESSMENT
AND CARE PLAN**



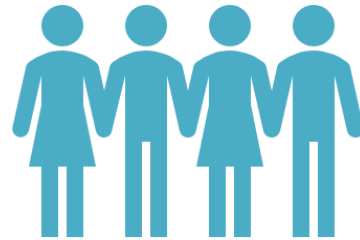
**THE MI APPROACH IS A KEY
STRATEGY FOR ENGAGING
PATIENTS DURING THE
ASSESSMENT AND CARE PLAN**



Questions and Comments?



Coming Up Next



Community Supports Referral Process

When: Friday, March 11, 2022

Time: 12:00 p.m.

ECM@LACare.org



Before You Go...

Please Complete the Evaluation of Today's Session

Complete the pop-up questions on your screen



From all of us...

