

Introduction to Team-Based Care



Welcome!

House Keeping



Virtual Etiquette

Meeting participation:

- We will be using the raise your hand feature by clicking on the little blue hand
- We will be using chat function
- When we are taking breaks be sure not to leave the meeting but rather mute your audio and video

Environment:

- Be aware of your backgrounds to not be distracting.
- Position yourself in the light.

Successful Completion Requirements:

- Attend the entire Introduction to Team-Based Care course, in-person or live virtual
Attendance criteria:
 - If the Learner misses > 30 minutes; the Learner will not be counted as “attended” and will need to retake the course.
 - If the Learner misses < 30 minutes; the Learner will be counted as “attended”. The Learner will need to review the missed course content located here: <https://micmt-cares.org/training>
 - If course is virtual – must attend by audio and video/internet
- Complete the Michigan Institute for Care Management and Transformation (MICMT) Intro to TBC post-test and evaluation.
 - Achieve a passing score on the post-test of 80% or greater. If needed, you may retake the post-test

You will have (5) business days to complete the post-test.



**Please take the
post test within 5
days for CE credit!**

Disclosures

There is no conflict of interest for anyone with the ability to control content for this activity.

Claiming Credits:

The AAFP has reviewed Team Based Care and deemed it acceptable for AAFP credit. Term of approval is from 10/23/2021 to 10/22/2022. Physicians should claim only the credit commensurate with the extent of their participation in the activity.

- Credit approval includes the following session(s):

7.50 In-Person, Live (could include online) AAFP Prescribed Credit(s) - Team Based Care

Social Work:

This course is approved by the NASW-Michigan Social Work Continuing Education Collaborative

- *Approval # 080821-00 7.0 Credits*

Agenda

Topic	Speaker	Time	Objective
Who, what, why and how: Team Based Care	Susan J. Vos BSN, RN, CCM	8 am – 9:30 am (90 minutes)	Identify key aspects of TBC
		10 Minute Break	
Care Coordination and Care Management across the team	Susan J. Vos BSN, RN, CCM Robin Schreur RN, BS, CCM	9:40 am – 10:20 am (90 minutes)	Review the roles of the team members in relation to care coordination and care management
		10 Minute Break	
Care Coordination and CM continued	Robin Schreur RN, BS, CCM	10:30 – 12:00 am (90 minutes)	Review the roles of the team members in relation to care coordination and care management
		Lunch 12 – 12:30	
Care Coordination and CM continues	Susan J. Vos BSN, RN, CCM Robin Schreur RN, BS, CCM	12:30 – 1:00 pm	Review the roles of the team members in relation to care coordination and care management
Outcomes and Quadruple AIM	Robin Schreur RN, BS, CCM	1:00 – 1:30	Discuss and link outcomes to the goals of triple AIM
		5 Minute Break	
Billing and Coding	Robin Schreur RN, BS, CCM	1:35 – 2:50 (60 minutes)	Identify codes available to sustain the work
Role Play	Susan J. Vos BSN, RN, CCM Robin Schreur RN, BS, CCM	2:50 – 3:35 (45 minutes)	Identify strengths and opportunities of the team in delivering TBC
Wrap Up and Evaluations		3:35 – 3:50 (15 Minutes)	Identify next steps and application within the practice

Reference Guidelines

“Material based off of the Introduction to Team-Based Care course developed through a collaborative effort facilitated by Michigan Institute for Care Management and Transformation and participating Training Organizations.”

Introductions: Polling

- Your name
- Your discipline
- How long have you been in your role
- What's most important for you to learn today



Pre-Work

Completion of pre-work material

- Share the Care Document
- SBAR Article



*If you didn't not have a chance to view the pre-work, please make sure to review

Why Team-based Care?

<https://www.youtube.com/watch?v=Kn3pXHcgG0A>

Team Based Care



The provision of health services to individuals, families, and/or their communities by at least two health care 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.

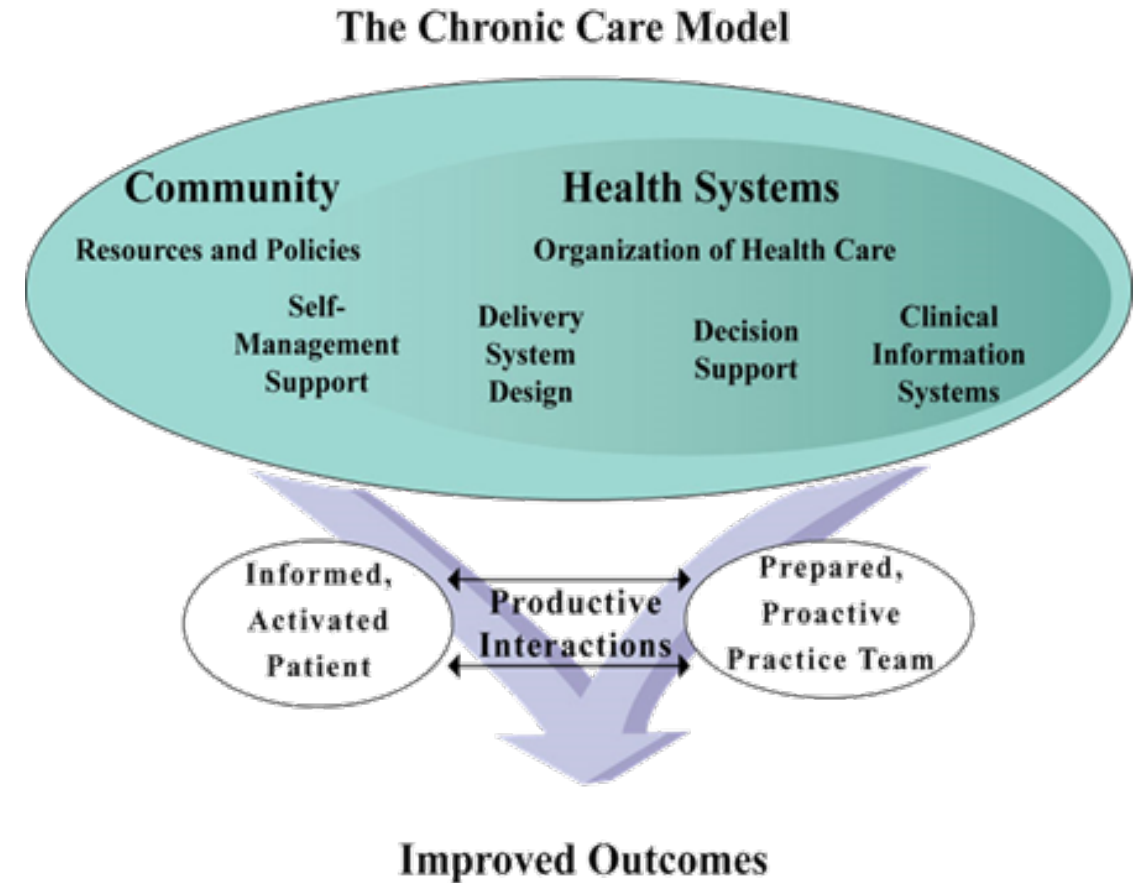
Evolution of Team-Based Care



Dr. Tom Simmer, MD, Retired
Served as Senior Vice President and Chief Medical Officer for BCBSM

The Chronic Care Model

- An organized and planned approach to improving patient and population level health.
- Focus is on productive interactions to improve healthcare outcomes.



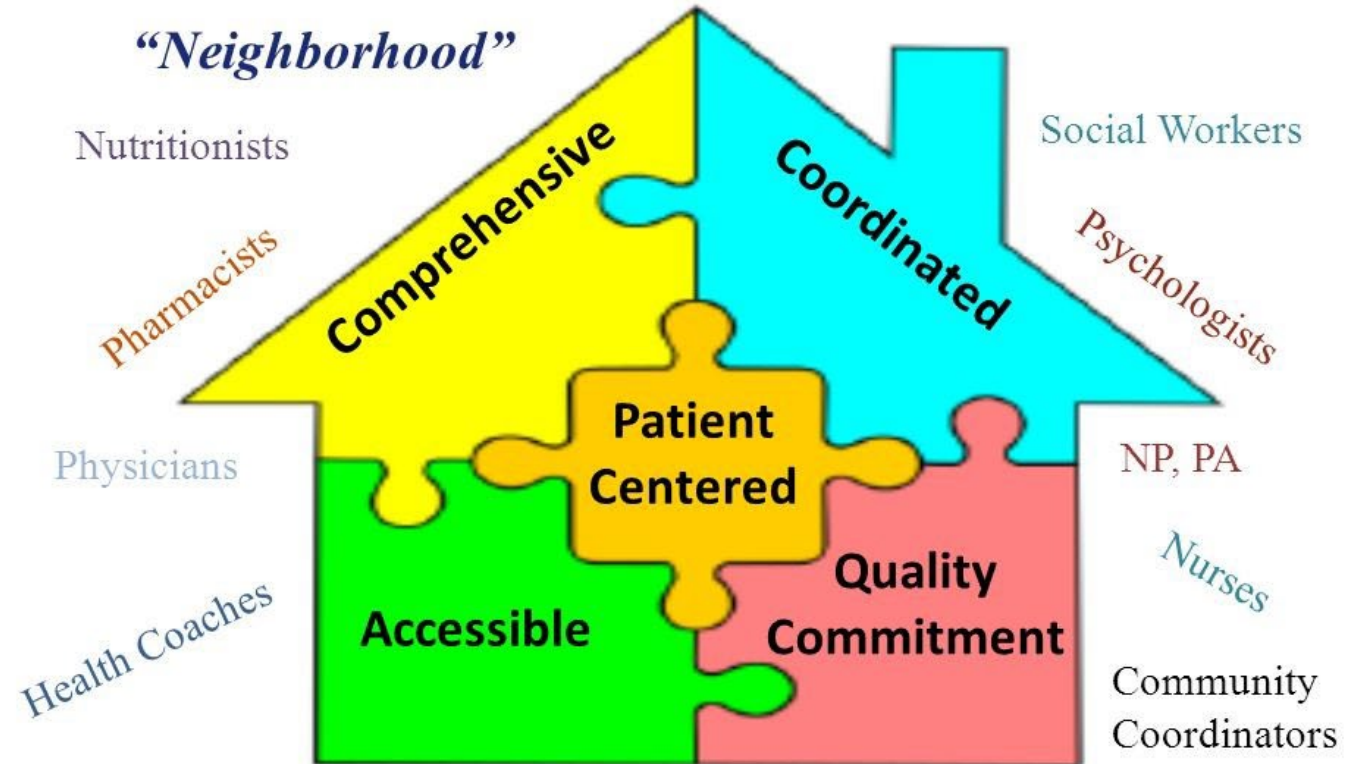
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Patient Centered Medical Home (PCMH)

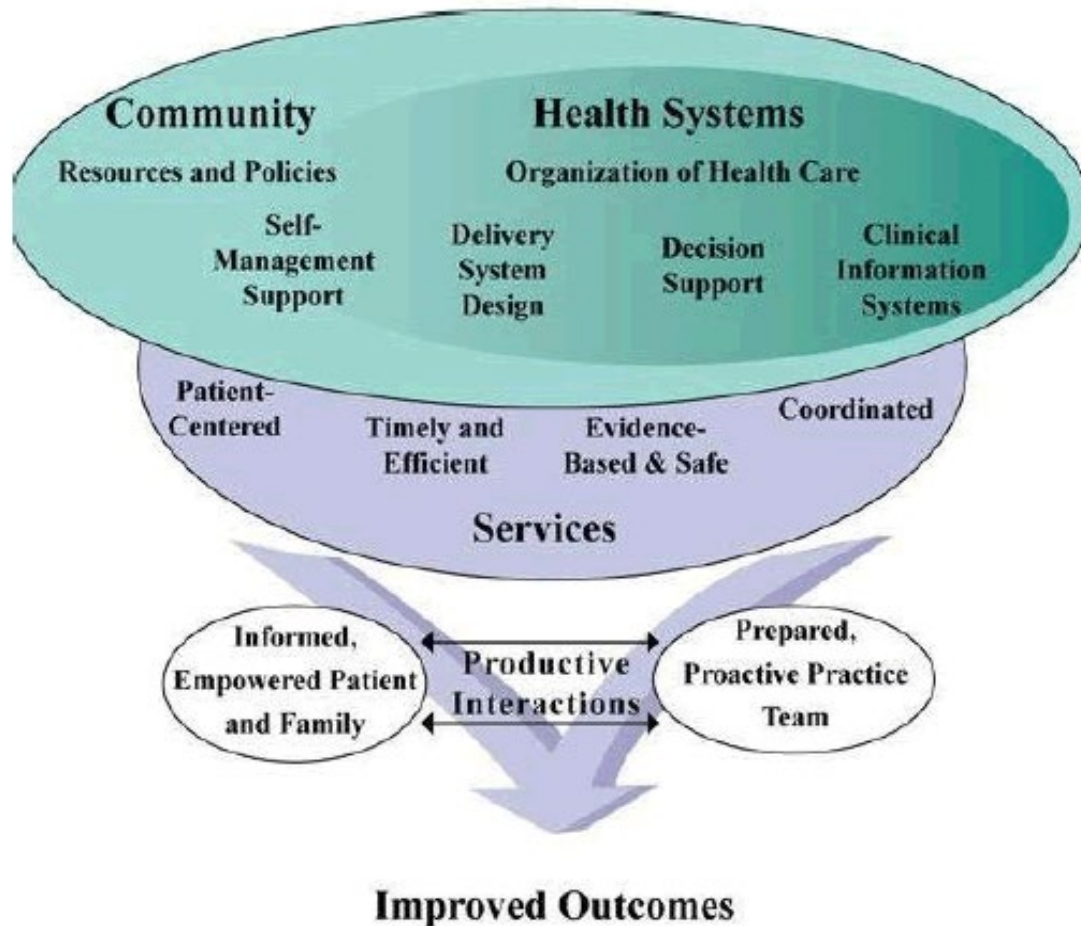
PCMH is a care delivery model in which patient treatment is coordinated through primary care teams to ensure patients receive the necessary care when and where they need it, in a manner they can understand.

Patient Centered Medical Home

“Neighborhood”



PCMH and Chronic Care Model Alignment



- Comprehensive Evidence-Based Framework for improving care delivery and patient-centered chronic condition management across the spectrum of healthcare
- Recognizes Primary Health Care as the necessary foundation from which the Community and Health System link to the patient
- Formal Quality Improvement process
- Self Management Support becomes universally accepted practice to engage patients across the spectrum of care continuum

Activating Patients – Self-Management Support

<https://www.youtube.com/watch?v=m8jr7gM-1vA&t=6s>

The Value of Team Based Care: *Patient, Practice and Payer Perspective*

Patient

- **Improved health and outcomes**
- Improved engagement and satisfaction
- Decreased unnecessary visits to the emergency department and hospital
- Improved ability to self manage
- Improved ability to engage with the practice team

Practice

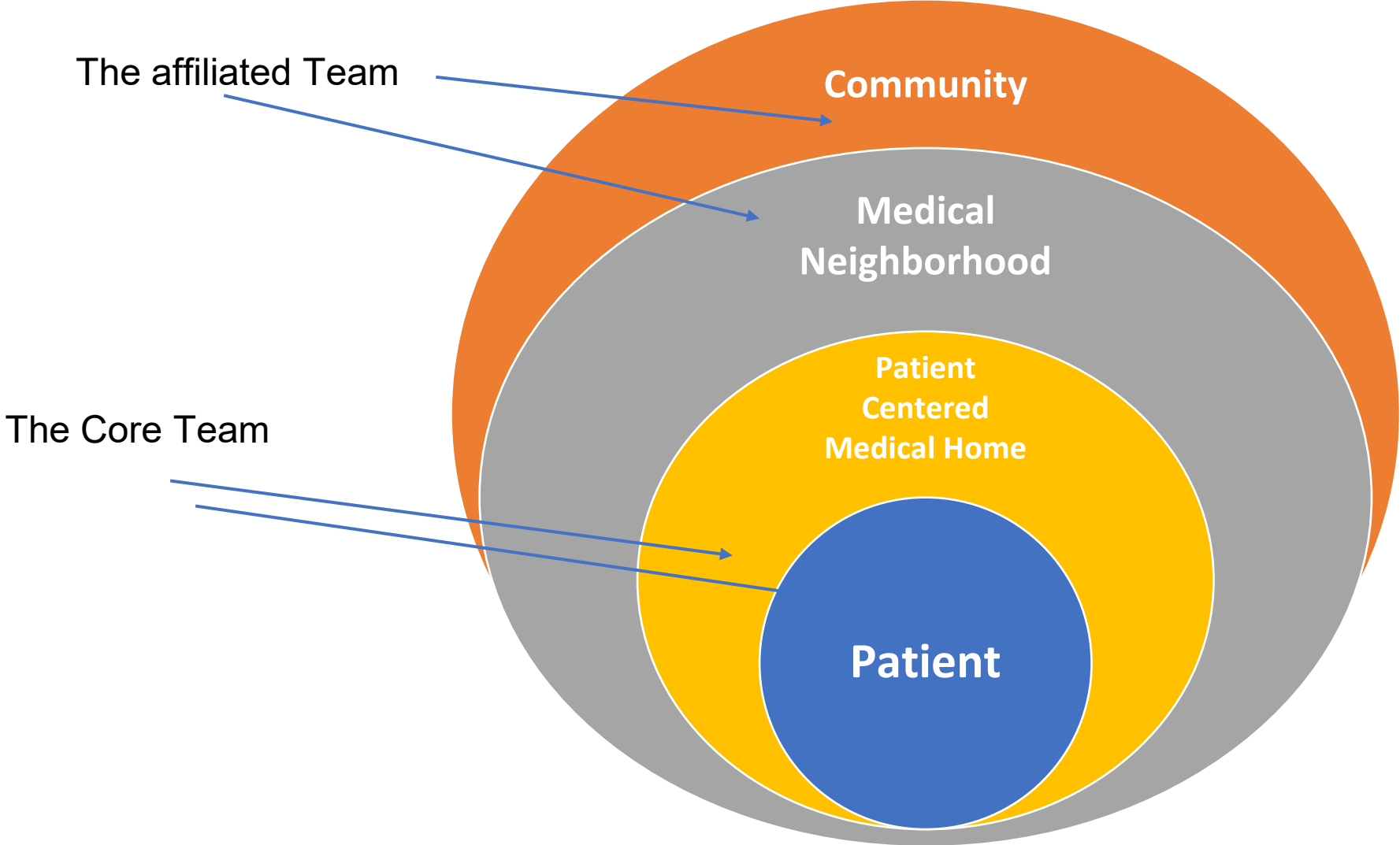
- Improved patient care
- Improved engagement of practice teams
- **Improved patient outcomes**
- **Decreased cost**
- Decreased burnout and turnover

Payer

- **Payers support programs that demonstrate improved quality and lower overall costs of care**
- **Outcomes measures, such as A1c, BP, Inpatient Utilization, and ED Utilization demonstrate improved quality of care resulting in decreased cost of care**
- **Improved patient care and quality resulting in decreased cost to all equates a successful program**

Who is on the team?

Community Team Members



Activity: Review Roles and Responsibilities

Responsibility	Role				
	Provider	Office clerical	Clinic MA	Care Team Member	Patient
Participate in huddle					
Identify patients for care management					
Call patients after inpatient discharge within 48 hours					
Complete proactive outreach using patient registry lists					
Check-in process					
Complete screenings					
Complete patient assessment for plan of care					
Assist in the development of the patient plan of care					
Assess and reassess patient goals for success					
Assist with navigation of services					
Review/assist with medication management					
Provide self-management support					
Document/communicate the plan of care					
Schedule follow-up visits					
Coordinate case closures					

Discussion: Review Roles and Responsibilities

Task	Role				
	Provider	Office clerical	Clinic MA	Care Team Member	Patient
Participate in huddle	X	X	X	X	
Identify patients for care management	X	X	X	X	X
Call patients after inpatient discharge within 48 hours			X	X	
Complete proactive outreach using patient registry lists		X	X	X	
Check-in process		X			
Complete screenings	X	X	X	X	
Complete patient assessment for plan of care	X			X	
Assist in the development of the patient plan of care	X			X	X
Assess and reassess patient goals for success	X			X	X
Assist with navigation of services	X	X	X	X	X
Review/assist with medication management	X		X	X	
Provide self-management support	X			X	
Document/communicate the plan of care	X		X	X	
Schedule follow-up visits		X		X	
Coordinate case closures	X			X	

The role of **practice leadership is to support the tasks of the provider, office clerical, clinic MA, and care team members. They are not directly involved in the day-to-day tasks of developing the patient's plan of care.*

Community Team Members

Referral Type	Where to Look
Community Team Members/Schools	<ul style="list-style-type: none"> • Community Resources (PO and Practice have a list) • School-Based Resources (Psychologist, Social Worker) • Faith-Based Partnerships
Health Department/Public Health	<ul style="list-style-type: none"> • Maternal/Infant Health (CSHCS: Children's Special Health Care Services) • Adult Resources • Education
Pharmacist	<ul style="list-style-type: none"> • Local Pharmacy (Walgreens, CVS, Rite Aid for drug specific questions)
Social Worker/Behavioral Health	<ul style="list-style-type: none"> • Referral from PCP • Local Community Mental Health • DHHS: Department of Health and Human Services • Public Health Services
Dietitian	<ul style="list-style-type: none"> • Referral from PCP • Online Resources (https://www.eatright.org/find-an-expert)
Other/General Help	<ul style="list-style-type: none"> • PO/Practice Leadership • MICMT (www.micmt-cares.org)

Let's Talk Team Communication

Communication is.....
...a taken-for-granted human
activity that is recognized as
important only when it has
failed.”

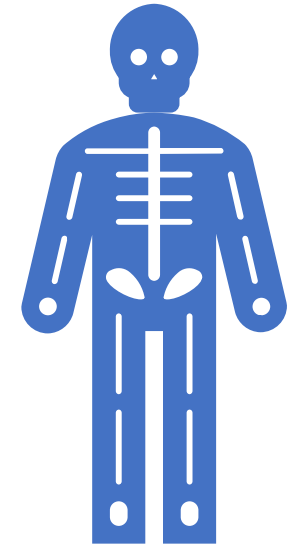
Complex
Setting

Complex
Patients

John is a 64-year-old male with a diagnosis of COPD. He has had COPD for the last 10 years.

Current findings:

- John was **recently hospitalized last month due to shortness of breath.**
- John is **a smoker** even though his physician has educated him on the problems associated with smoking.
- He also has **high blood pressure which at this time is borderline.**
- He currently takes Symbicort and albuterol for management of his COPD.
- He is currently **not on any medication for his blood pressure although when discussed John refuses to be on any medication.**
- John **lost his wife one year ago and is on his own.**
- The closest family he has lives out of state.
- He is on a fixed income and sometimes has difficulty paying his bills or putting food on the table.



Let's Try

Where would you start? Priorities	Preventive Screenings Needed	Who on the team?	Methods of Communication	Who in the Medical Neighborhood?	Methods of Communication

Let's Try

Where would you start? Priorities	Screenings Needed	Who on the team?	Methods of Communication	Who in the Medical Neighborhood?	Methods of Communication
SOB/Symptoms BP Plan	Disease Specific Medication Evaluation	Provider Pharmacist Care Manager		Pulmonary Cardiology Palliative Care?	
Loneliness/Social Isolation Insecurities	PHQ2/9 SDOH	Behavioral Health LMSW/MSW CHW			
Risk Factors	Smoking Cessation	Behavioral Health Care Manager		Smoking Cessation Programs	
Preventive Measure	Age appropriate Immunizations	MA Population Health			

A man with a beard and grey hair, wearing a grey suit jacket over a dark blue shirt, sits at a desk in a modern office. He is looking towards two women who are seated across from him. The woman on the left has short blonde hair and is wearing glasses and a white shirt. The woman on the right is partially visible, also in a white shirt. They appear to be in a collaborative meeting. The desk is cluttered with various items including laptops, notebooks, pens, and sticky notes. A potted plant is visible in the background.

It's about Relationship and Engagement with Team members Team Communication

- Seek out opportunities for interactions
- Shadow and reverse shadow team members
- Be curious
- Recognize common goals and values
- Recognize there may be differences in communication style
- Seek to understand-address proactively
- Assume the best

Team Communication

Barriers to Good Communication



Personal

- Memory limitations
- Stress/anxiety
- Fatigue, physical factors
- Multi-tasking
- Flawed assumptions
- New role/new team

Environmental

- Many modes communication
- Rapid change
- Time pressure
- Distractions
- Interruptions
- Variations in team culture

Communication Tools

- Clear patient encounter documentation in the EHR
- Messaging (skype)
- Ad hoc conversations
- SBAR (Situation, Background, Assessment, Recommendation)

Different communication tools serve different purposes – all are meant to keep the team informed of patient progress, plan of care changes, and operational changes that support better patient outcomes.

SITUATION

What is going on with the patient?

"Dr. Lu, this is Alex, a nurse from your 5th Street office. I am calling about your patient, Mr. Webb. He reports being in substantial discomfort and that there is not much urine in his catheter bag."

BACKGROUND

What is the clinical background or context?

"Mr. Webb is an 83-year-old patient that has a catheter in place during his recovery from bladder cancer treatment."

ASSESSMENT

What do I think the problem is?

"He also reports a temperature of 100.4 and that the urine in his bag is cloudy and slightly red. I am concerned he may have an infection and that his catheter may be clogged."

RECOMMENDATION OR REQUEST

What would I do to correct it?

"I would like him to come into the office this morning for you to see him. When he arrives, would you like us to get labs, including blood cultures, to check for infection?"

- Do not forget to introduce yourself—you should not assume that everyone knows who you are.
- SBAR is adaptable. Think of it as a menu: the parts you choose to use and the order in which they are used depend on your team's unique needs. Determine which parts of SBAR are relevant to your team's needs and use those when communicating critical information among your team members.
- SBAR can be modified for use by the patient or family caregivers to communicate with the care team. For example, your facility could provide patients with a summary of SBAR to enable them to share information about their own situation, background, assessment, and recommendations or to ask the care team about their care.
- Consider saying the actual words to keep yourself on track: "The situation is..., The background is..., My assessment is..., I recommend..."



SBAR Resource

AHRQ: <https://www.ahrq.gov/teamstepps-program/curriculum/communication/tools/sbar.html>

SBAR Ineffective Communication

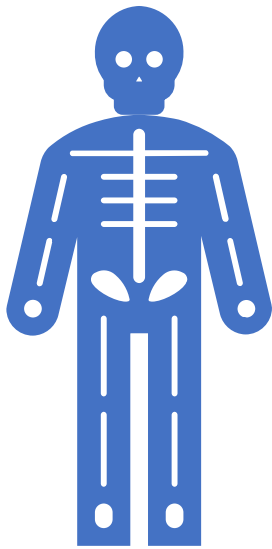
<https://www.youtube.com/watch?v=CtdNQ-sfKg8>

SBAR Effective Communication

<https://www.youtube.com/watch?v=fsazEArBy2g>

Thoughts on SBAR Videos

What made the difference?



Daughter calls the clinic: Pt has Increasing symptoms of fatigue, weakness, shortness of breath

- Age 83
- Hospitalized 3 months ago for exacerbation of his Heart Failure
- History of hypertension, coronary artery disease, Myocardial infarction
- Temporarily living with his daughter

Unsure about his medications

- Specifically, in the hospital they held his hydrochlorothiazide and on discharge did not give any directions on what to do about that

States feeling “low”

Not following the low sodium diet – can’t stand the food without seasoning

Worried about his living arrangements

- Wants to go back home but his daughter is concerned about that
- He has fallen once – no injuries other than bruises on his forehead
- He is unable to complete his own activities of daily living without some assistance
- Tires easily and needs help dressing
- He can do his own personal hygiene

He’s having trouble sleeping

He completed the SDOH screening

- Needs assistance with transportation to medical appointments
- Has housing needs (based on wanting to return home)

MR. B

Calls the clinic

Increasing symptoms of fatigue, weakness, shortness of breath

- Age 83
- Hospitalized 3 months ago for exacerbation of his Heart Failure
- History of hypertension, coronary artery disease, Myocardial infarction
- Temporarily living with his daughter

- Unsure about his medications
 - Specifically, in the hospital they held his hydrochlorothiazide and on discharge did not give any directions on what to do about that
- States feeling “low”
- Not following the low sodium diet – can’t stand the food without seasoning
- Worried about his living arrangements
 - Wants to go back home but his daughter is concerned about that
 - He has fallen once – no injuries other than bruises on his forehead
 - He is unable to complete his own activities of daily living without some assistance ○
 - Tires easily and needs help dressing
 - He can do his own personal hygiene
- He’s having trouble sleeping
- He completed the SDOH screening
 - Needs assistance with transportation to medical appointments
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Let's Try

Situation	Background	Assessment	Recommendation

Let's Try

Situation	Background	Assessment	Recommendation
<p>Increasing symptoms of fatigue, weakness, shortness of breath</p>	<ul style="list-style-type: none"> • Age 83 • Hospitalized 3 months ago for exacerbation of his Heart Failure • History of hypertension, coronary artery disease, Myocardial infarction • Temporarily living with his daughter – wants to go home 	<p>Unsure about his medications Specifically, in the hospital they held his hydrochlorothiazide and on discharge did not give any directions on what to do about that</p> <p>Difficulty Sleeping</p> <p>He is unable to complete his own activities of daily living without some assistance</p> <p>Feeling LOW</p>	<p>Appointment today with daughter.</p> <ul style="list-style-type: none"> • Physical assessment • Review meds and determine medication plan for heart failure. • Homecare referral for home assessment for supportive resources and DME needs <p>Comprehensive Assessment</p> <ul style="list-style-type: none"> • Depression screen₃₈ • SDOH assessment

Operating Guidelines: Policies & Procedures

- Collaborative Practice Agreements
- Standing Orders
- Meetings and Huddles



Meeting Examples – Varies within Organizations

Huddle	Meeting
Short, patient centered	Has an agenda, operational
Frequent, even daily	Less frequent, but scheduled regularly or ad hoc
Goal is to discuss arising situations that need multi-disciplinary support and are complex enough for a conversation: <ul style="list-style-type: none"> • High risk patients, complex Plans of Care • ED or IP visits • Requests for different referrals • Concerns for a patient 	Goal is to improve the overall program performance: <ul style="list-style-type: none"> • Review operational opportunities, such as scheduling or standing agreements/orders • Review process for referrals • Review outcomes measures / performance
Participants include the individuals directly involved with the huddle topics	Participants expanded to include all involved with the process on the agenda: front and back office, billing, PCP, Care Team, MA, Office Manager

Collaborative Practice Agreements

- A legal agreement that formally defines the relationship between the physician and care team member (usually used with Pharmacists) that expands the role of the care team member beyond the normal licensure confines.
- For pharmacists, this frequently gives the ability to provide medication management through titration of meds and ordering supplies.



Standing Orders/Agreements

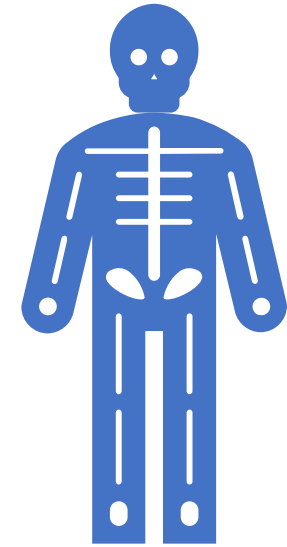
- Standing Orders/Agreements facilitate team-based care by giving blanket agreement for proactive outreach by the care team
- Standing orders examples:
 - Transitions of Care phone calls
 - Calling patients for gaps in care / other preventive care
 - Immunizations procedures
 - Enrollment into chronic care management



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Current findings:

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- He is currently not on any medication for his blood pressure although when discussed John refuses to be on any medication.
- John lost his wife one year ago and is on his own.
- The closest family he has lives out of state.
- He is on a fixed income and sometimes has difficulty paying his bills or putting food on the table.



What would you change? Anything added?

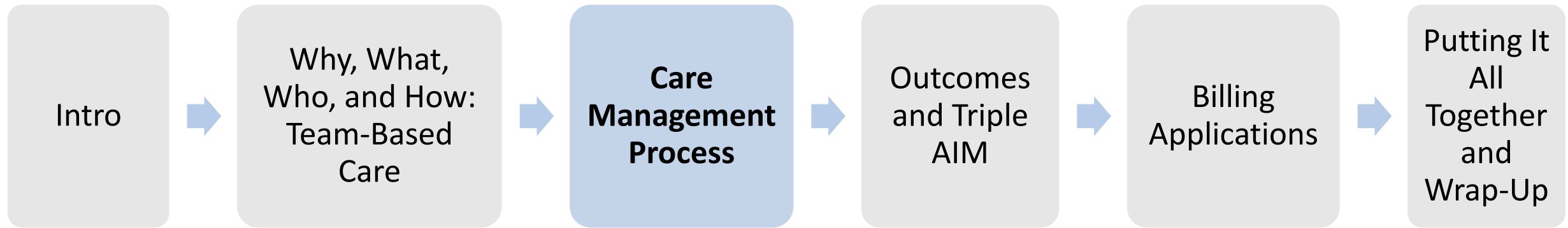
Where would you start? Priorities	Preventive Screenings Needed	Who on the team?	Methods of Communication	Who in the Medical Neighborhood?	Methods of Communication

Key Takeaways

- Team-based care is derived from the chronic care model and patient-centered medical home.
- Team structure and roles help define how the team can work together.
- Communication tools help improve the team's ability to provide patient-centered care.
- Feedback loops help assure that the sender's message has been understood by the receiver.



Agenda



Care team members improve outcomes by using evidence-based care within the framework of the Care Management Process and through productive interactions with the patient.



Care Management Process



Build a panel of patients that is related to the outcomes measures that indicate program success

Align Outreach with Outcomes

Work with your practice team and physician to identify patients who need support to improve the key outcomes measures.

Evidence-based Guidelines

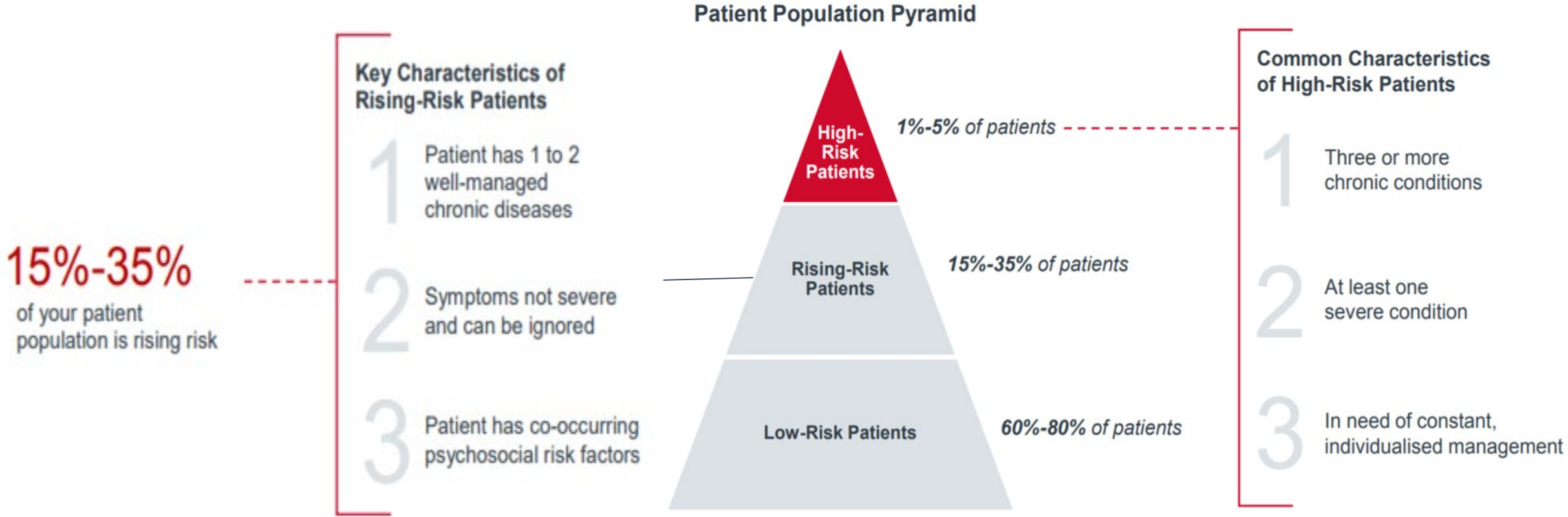
Top Adult Outcome Measures

- Lower ED Utilization
- Lower Inpatient Utilization
- A1c in Control
- BP in Control

Top Pediatric Outcome Measures

- Lower ED Utilization
- Lower Inpatient Utilization
- ED Visit Follow-Up for Mental Illness
- ADHD Medication Management
- Asthma Medication Management

Risk Stratification



Build a Targeted Patient Panel

- **Referrals:** Physicians and other care team members can identify patients - often through screenings - who would be appropriate and refer them to you for support.
- **Registry:** Proactive outreach using lists of patients from a registry can be an easy way to find patients with the diagnoses or gaps of focus.
- **Transitions of Care and Admission / Discharge / Transfer (ADT) Notifications:** Your PO / practice will have a way of knowing when somebody is discharged from the hospital / ED; usually on a daily basis, if not in real time!
- **PO or Practice Risk Stratification Processes:** Your PO / practice may have a way to identify high risk and rising risk patients.



Referral Process

- Developing a simple referral process for providers and care team members to send you patients is one of the ways that you can build your team.
- If your providers are open to the idea, set up regular short huddles to review the patients who are coming in for the day or for the week to see if there are appropriate people for care management.
- This keeps the provider engaged in the care and provides an opportunity for the care team member to learn more about the patient from the provider.

Proactive Identification: A Critical Step Using Your Registry

It will take considerable time to build caseloads and impact outcomes if we wait for patients to seek care and for members of the team to make a referral.

- Patients who may need your service may not seek care or come into the practice.
- Proactive outreach for gaps in care can help re-engage patients with evidence-based preventive care.

Admission / Discharge / Transfer (ADT) Notifications

- ADT notifications are the process by which your Physician Organization (PO) or office knows when patients are admitted to the hospital or present to the Emergency Department (ED).
- It's important to find out how your office receives ADT notifications so that you can support the patient.

Resource: [Improving Care Coordination Through Health Information Exchange, Oakland Southfield Physicians](#)

Transitions of Care (TOC)

- A set of actions designed to ensure the coordination and continuity of health care as patients transfer from hospital to home.
- TOC services are provided after a patient is discharged from one of these inpatient settings, with the goal of preventing a readmission:

Inpatient
acute care
hospital

Hospital
outpatient
observation

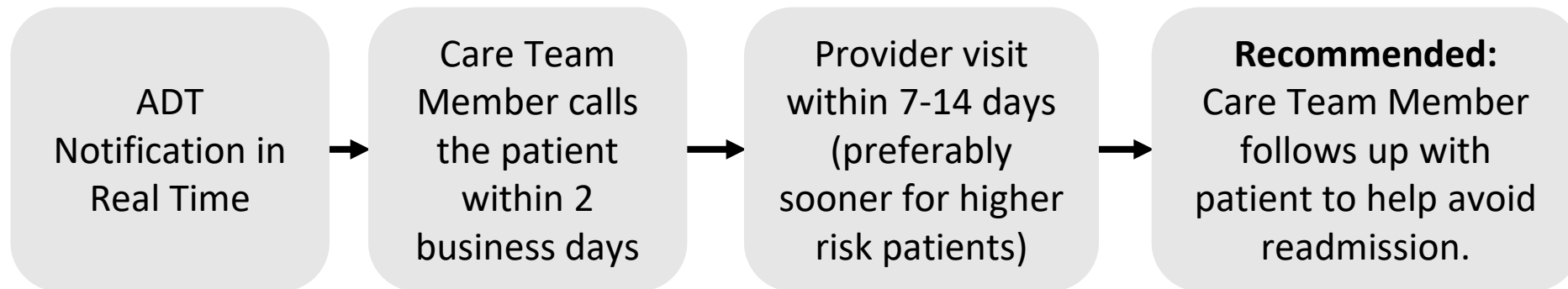
Skilled
nursing
facility (SNF)

Other
inpatient
settings

Resource: [Transitions of Care eLearning](#)

Transitional Care Management (TCM) Requirements

- TCM requirements are the steps needed for your provider to bill a higher level code (99495 and 99496) after a patient is discharged home from the inpatient setting.
- TCM requirements are also shown to reduce readmissions. Win/Win!



*Note: The 98966-68 phone call codes should not be billed when calling the patient as part of the TCM codes.

Resource: [CMS TCM Services](#)

Transition of Care : Poll

Key Elements of the Transitions of Care Call

** Reference the MiCCSI
post-discharge call
template on our website
under the training
documents



What is your elevator speech?
(Write it down!)

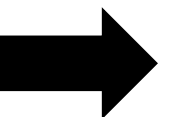


Engaging the patient!

Introducing team-based care management and other services to the patient/caregiver: Elevator speech



Meet the Patient Where They are At



Key Components of the Introduction

- Introduce team care concepts to include the provider and patient
- Value to the patient
- The patient's role
- What can the patient expect, to include timeline
- Addressing cost questions



Demonstration

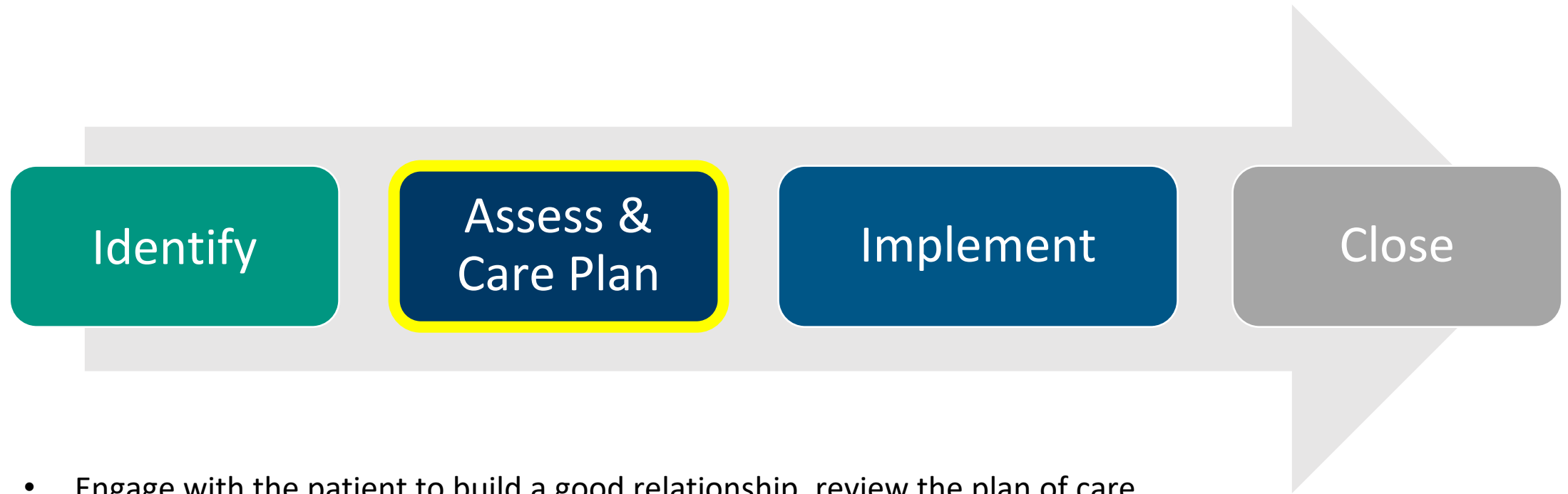
- Listen for key points to include in the introduction to demonstrate competencies of:
 - Acknowledging the patient
 - Permission and expected time
 - Describe the roles of the team
 - Relationship of the roles to the provider and other team members
 - Acknowledge and check-in
 - Patient value of TBC
 - Patient role
 - Expectations of TBC to include the timeline
 - Cost
 - Acknowledge questions

Key Takeaways

- Build a panel of patients that is related to the outcomes measures that indicate program success through:
 - Referrals
 - Proactive outreach through registry lists
 - ADT notifications to support transitions of care



Care Management Process



- Engage with the patient to build a good relationship, review the plan of care
- Review the Physical, Behavioral, Social characteristics of the patient, as well as the patient's desire to change
- Co-develop a plan of care that might include a Symptom Management plan
- Co-develop a Self-Management Action Plan with patient
- Determine the follow up plan

Assessment and Care Planning

Use of Motivational Interviewing: A Guiding Approach

<https://www.youtube.com/watch?v=SsNgZ47o2I4>

Patient Assessment

The assessment provides patient context and supports co-development of the Plans of Care.

Review historical screenings, gather information from the provider or other care team members as possible, and talk with the patient to understand the patient's understanding of and situation with regards to their:

- Physical diagnoses
- Behavioral diagnoses or symptoms
- Social needs (Social Determinants of Health)
- Desire for change



Licensed Care Team Members can bill a G9001 for a Comprehensive Assessment.

Assessment Elements for Plans of Care

Key Area of Focus	Screening tools/Methods
<p>Physical</p> <ul style="list-style-type: none"> Clinical diagnoses, medications 	<ul style="list-style-type: none"> Identify the extended care team (specialists, PCP, etc) Chronic conditions Functional status Utilization Patient's risk score Medication Review
<p>Behavioral</p> <ul style="list-style-type: none"> Behavioral health symptoms and/or diagnoses 	<ul style="list-style-type: none"> Behavioral health diagnoses and if the patient is working with a Behavioral Health Specialist Substance Use (smoking, alcohol, controlled substances) PHQ-9 GAD-7 Cognitive status
<p>Social</p> <ul style="list-style-type: none"> Social Determinants of Health (SDoH), health literacy, family / community support 	<ul style="list-style-type: none"> Evaluate patient's understanding of his/her health Social Needs Assessment Nutritional Status What is the support level? Does the patient have a caregiver?
<p>Patient or Caregiver's Ability / Desire</p> <ul style="list-style-type: none"> Desire and Ability Active role within the team Patient/Caregiver concerns, importance, priority, hope 	<ul style="list-style-type: none"> Discussion about ideal state / goals Confidence in achieving goals Review with the patient the visit activities and reasons for the visit Determine the patient's readiness to set self-management action plan goals

Engage the Patient for a Successful Assessment

- Use open-ended questions
- Demonstrate interest in the patient
- Active listening

Key Areas of Focus

- Linguistic and Cultural Needs
- Health Literacy
- Health Status
- Psychosocial Status/Needs
- Patient Knowledge/Awareness/Ability

Group Activity: Create an open-ended question for one of the Key Areas of Focus

Medical Concerns and Interventions Identified



Symptom Management



Medication Management



Education and coaching to self-manage condition/health



Planned interventions: tests, procedures

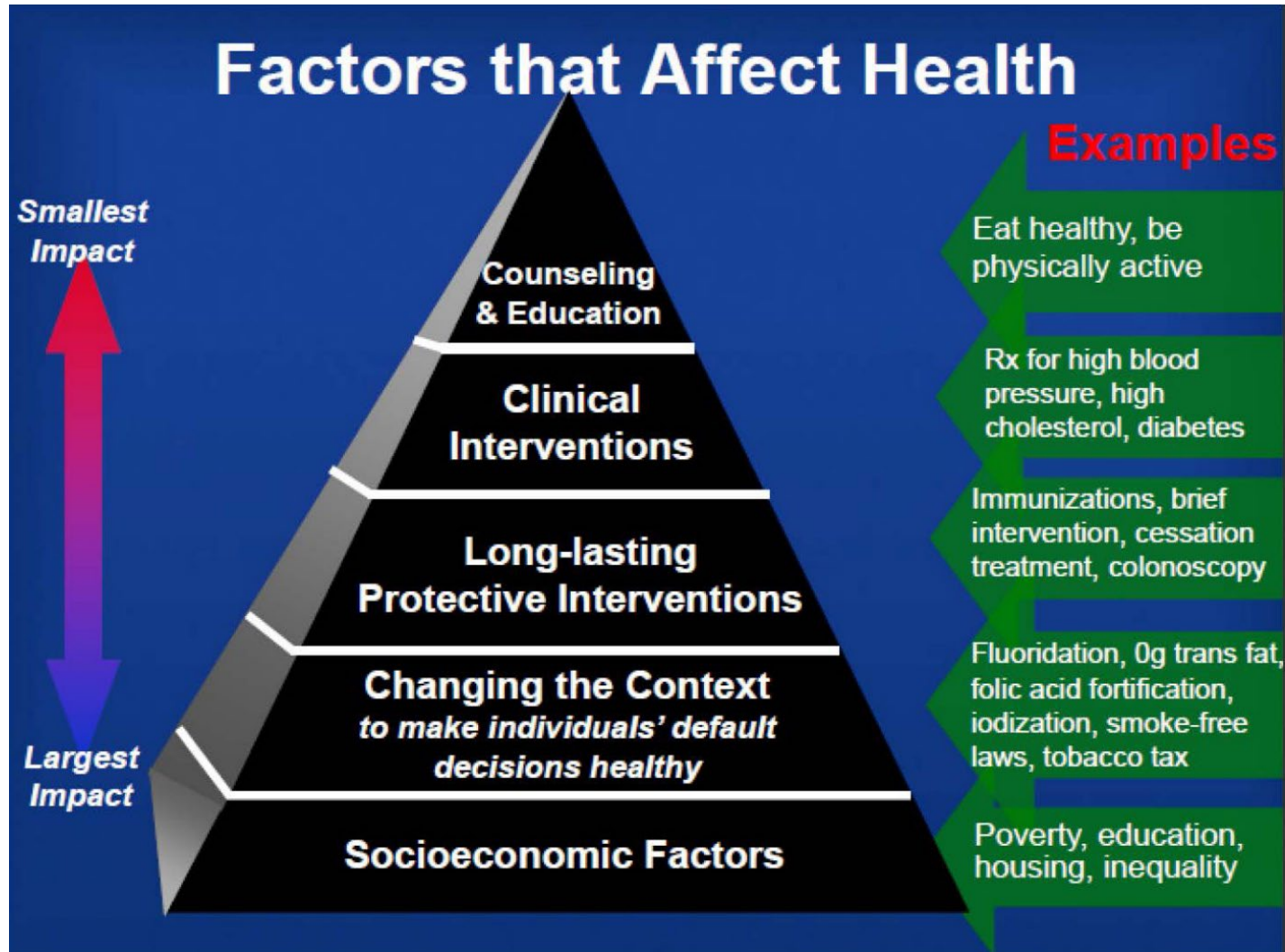


Follow up schedule: planned visits, phone calls



Coordination of care across settings: specialists, community, other services

Social Determinants of Health



Social Needs



<https://www.youtube.com/watch?v=I7iSYi3ziTI>

Poverty Facts

Poverty in the United States is concentrated in specific regions, counties, and neighborhoods. These areas face obstacles such as:

- Poor housing and health conditions
- Higher crime and school dropout rates
- Lower employment opportunities
- Lack of healthy foods, contributing to social determinants of health.

Poverty is shown to influence health outcomes, with unmet social needs, environmental factors, and barriers to accessing health care contributing to worse health outcomes for people with lower incomes.

Rural poverty rates continue to be higher than urban rates, with Black Americans being the most likely to live in poverty in nonmetro areas.

Those who qualify as impoverished may have more difficulty obtaining health insurance or paying for expensive procedures and medications.

Children comprise the largest age group experiencing poverty and childhood poverty is associated with:

- Developmental delays
- Toxic stress
- Chronic illness
- Nutritional deficits.

**Visit the ASPE's [FAQs](#) for poverty guidelines and general poverty.

Behavioral Needs

Screenings conducted to identify patients with risk

- Depression Screening (PHQ-9)
- Anxiety Screening (GAD-7)

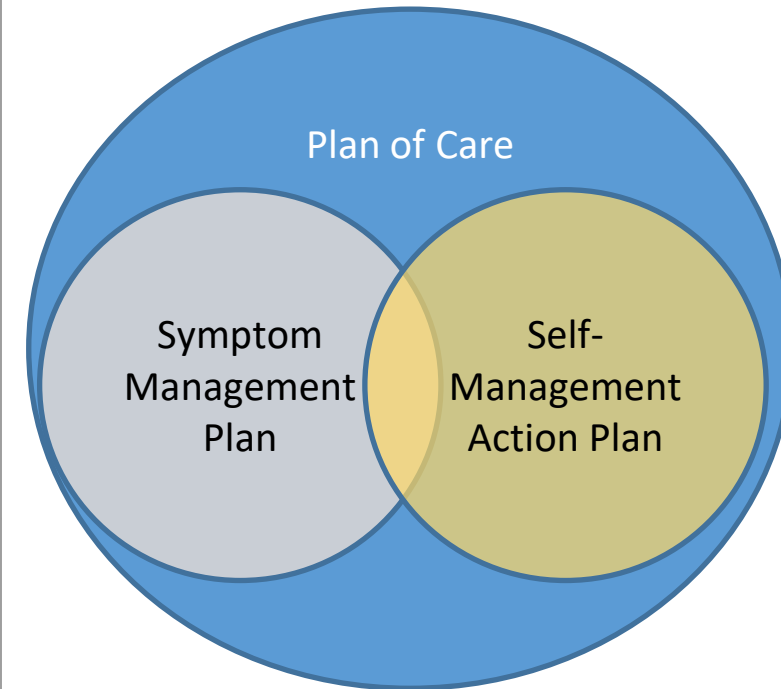
Workflows

- Documentation
- Confirm diagnosis
- Treatment plan



Plans of Care

Care Plan Type	Definition	Example
Plan of Care	<p>Clinical care plan that identifies the outcomes goals recommended by the care team. It includes the symptom management plan and the self-management action plan.</p> <p>A follow up plan with the care team is part of the Plan of Care.</p>	<p>Mrs. Brown comes into the office with shortness of breath. Peak flow is evaluated; respiratory assessment is done. Provider team develops a plan of care that includes follow up visits and care management visit on a weekly basis for a month.</p> <p>The patient is given an asthma action plan showing symptom management progression and appropriate actions to take if her asthma exacerbates.</p> <p>The patient discussed self-management goals with the care manager. Mrs. Brown's desire is to go walking again with a group of friends without discomfort from shortness of breath. She committed to using her medication regularly as a first step to being able to walk regularly again.</p>
Symptom Management Plan	Identifies the appropriate next steps based on symptoms –i.e. when to use the emergency department, call the office, self-care.	<p>From the above example: The Asthma Action Plan is the symptom management plan. It shows Mrs. Brown when to go to the ED, when to call the office, and when the symptom is something she can handle on her own with an inhaler.</p>
Self-Management Action Plan	Small, usually life-style goals driven by the patient's desired outcomes. Can also include elements of the symptom management plan.	<p>From the Plan of Care: Mrs. Brown committed to using her medication regularly.</p>



Self-Management Action Plan

- Supports the team-developed Care Plan
- Developed by the patient with support from the care team to set mutual goals and actions to support improved health outcomes.
- Should be reviewed and potentially revised at every visit.

Components can include

- SMART goals (developed with patient)
- Lifestyle changes
- Symptom Management Plan
- Medication Management
- Education and coaching to self-manage condition/health
- Planned interventions: tests, procedures
- Follow up plan (both planned visits with the provider and in-between visits with the care team)
- Coordination of care across settings: specialists, community



Specific

Who, What, Where,
When, Why, Which

Define the goal as much
as possible with no
ambiguous language.

WHO is involved, WHAT
do I want to accomplish,
WHERE will it be done,
WHY am I doing this
(reasons, purpose),
WHICH constraints /
requirements do I have?



Measurable

From and To

Can you track the
progress and measure
the outcome?

How much, how many,
how will I know when
my goal is
accomplished?



Attainable

How

Is the goal reasonable
enough to be
accomplished? How so?

Make sure the goal is
not out of reach or
below standard
performance.



Relevant

Worthwhile

Is the goal worthwhile
and will it meet your
needs?

Is each goal consistent
with other goals you
have established and
fits with your
immediate and long
term plans?



Timely

When

Your objective should
include a time limit. "I
will complete this step
by month/day/year."

It will establish a sense
of urgency and prompt
you to have better time
management.

“Guidance of the team reflects the needs of the patient”

- While the care team may have goals for the patient, it's really the *patient* who decides the goals that they can and want to work on.
 - This frequently means the focus is on behavioral, not outcomes goals.
- Use a scale from 1-10 to measure the patients' confidence in achieving the goal. Higher confidence = more likely to succeed!



Symptom Management Plan Tool

Helps patients recognize and monitor their symptoms:

- Assist patients in recognizing early symptoms with the goal of avoiding unnecessary utilization.
- Identifies the symptoms to be aware of and appropriate corresponding actions.

Frequently follows the 'stoplight' model:

- **Green**: Maintaining Goal(s)
- **Yellow**: Warning when to call provider/office
- **Red**: Emergency symptoms

Action Plan Examples

Polling Your Experience

Self-Check Plan for HF Management

RISE ABOVE Heart Failure

Excellent – Keep Up the Good Work!

- No new or worsening shortness of breath
- Physical activity level is normal for you
- No new swelling, feet and legs look normal for you
- Weight check stable Weight: _____
- No sign of chest pain

GREAT! CONTINUE: Daily Weight Check, Meds as Directed, Low Sodium Eating, Follow-up Visits

Pay Attention – Use Caution!

- Dry, hacking cough
- Worsening shortness of breath with activity
- Increased swelling of legs, feet, and ankles
- Sudden weight gain of more than 2-3 lbs in a 24 hour period (or 5 lbs in a week)

CHECK IN! Your symptoms may indicate: A need to contact your doctor or provider

Medical Alert – Warning!

- Frequent dry, hacking cough
- Shortness of breath at rest
- Increased discomfort or swelling in the lower body
- Sudden weight gain of more than 2-3 lbs in a 24 hour period (or 5 lbs in a week)
- New or worsening dizziness, confusion, sadness or

WARNING! You need to be evaluated right away.

I'm sick or hurt... Where do I go?

(Or, where do I take my child or parent?)

CALL OR SEE MY DOCTOR

Need medical care and feel safe to wait a day.

EXAMPLES ARE:

- Runny nose
- Simple backache
- Sore throat
- Earache

Need medical care today and feel safe to wait a few hours.

EXAMPLES ARE:

- Tried but could not reach my doctor
- Reached the doctor and told to go to an Urgent Care Center

Need medical care now and do not feel safe to wait.

EXAMPLES ARE:

- Trouble breathing or chest pain
- Fainting
- Sudden numbness or weakness
- Uncontrolled bleeding
- Severe pain or serious injury

Council, © 2013 coalition

My Asthma Action Plan

Age ≥ 5 years

Patient Name: _____ Medical Record #: _____

Physician's Name: _____ DOB: _____

Physician's Phone #: _____ Completed by: _____ Date: _____

Long-Term-Control Medicines	How Much To Take	How Often	Other Instructions
		_____ times per day EVERY DAY!	
		_____ times per day EVERY DAY!	
		_____ times per day EVERY DAY!	
		_____ times per day EVERY DAY!	
Quick-Relief Medicines	How Much To Take	How Often	Other Instructions
		Take ONLY as needed	NOTE: If this medicine is needed frequently, call physician to consider increasing long-term-control medications.

Special instructions when I feel **good**, **not good**, and **awful**.

GREEN ZONE I feel **good**. (My peak flow is in the GREEN zone.)

YELLOW ZONE I do **not** feel good. (My peak flow is in the YELLOW zone.)

RED ZONE I feel **awful**. (My peak flow is in the RED zone.)

PREVENT asthma symptoms everyday:

- Take my long-term-control medicines (above) every day.
- Before exercise, take _____ puffs of _____
- Avoid things that make my asthma worse like: _____

CAUTION I should continue taking my long-term-control asthma medicines every day AND:

- Take _____
- Add _____
- Call _____

If I still do not feel good, or my peak flow is not back in the Green Zone within 1 hour, then I should:

- Increase _____
- Add _____
- Call _____

MEDICAL ALERT! Get help!

- Take _____ until I get help immediately.
- Take _____
- Call _____

Danger! Get help immediately! Call 9-1-1 if you have trouble walking or talking due to shortness of breath or lips or fingernails are gray or blue.

Plans of Care: Communication Needs

- Plans of Care should be documented and shared in the EHR/patient record.
- Communication of the Plans of Care are also important across locations of care:
 - Verbally at huddles or with the provider in the office
 - Between PCPs and Specialists
 - With the patient and his/her caregivers (there may be multiple caregivers!)



Key Takeaways

- Assessment includes the following components:
 - Physical
 - Behavioral
 - Social
 - The patient's desire to change
- The assessment informs the patient's Plans of Care, which outline overall health goals, what the patient believes he/she can do to improve health outcomes and the follow up plan between the care team and the patient.

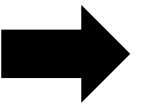
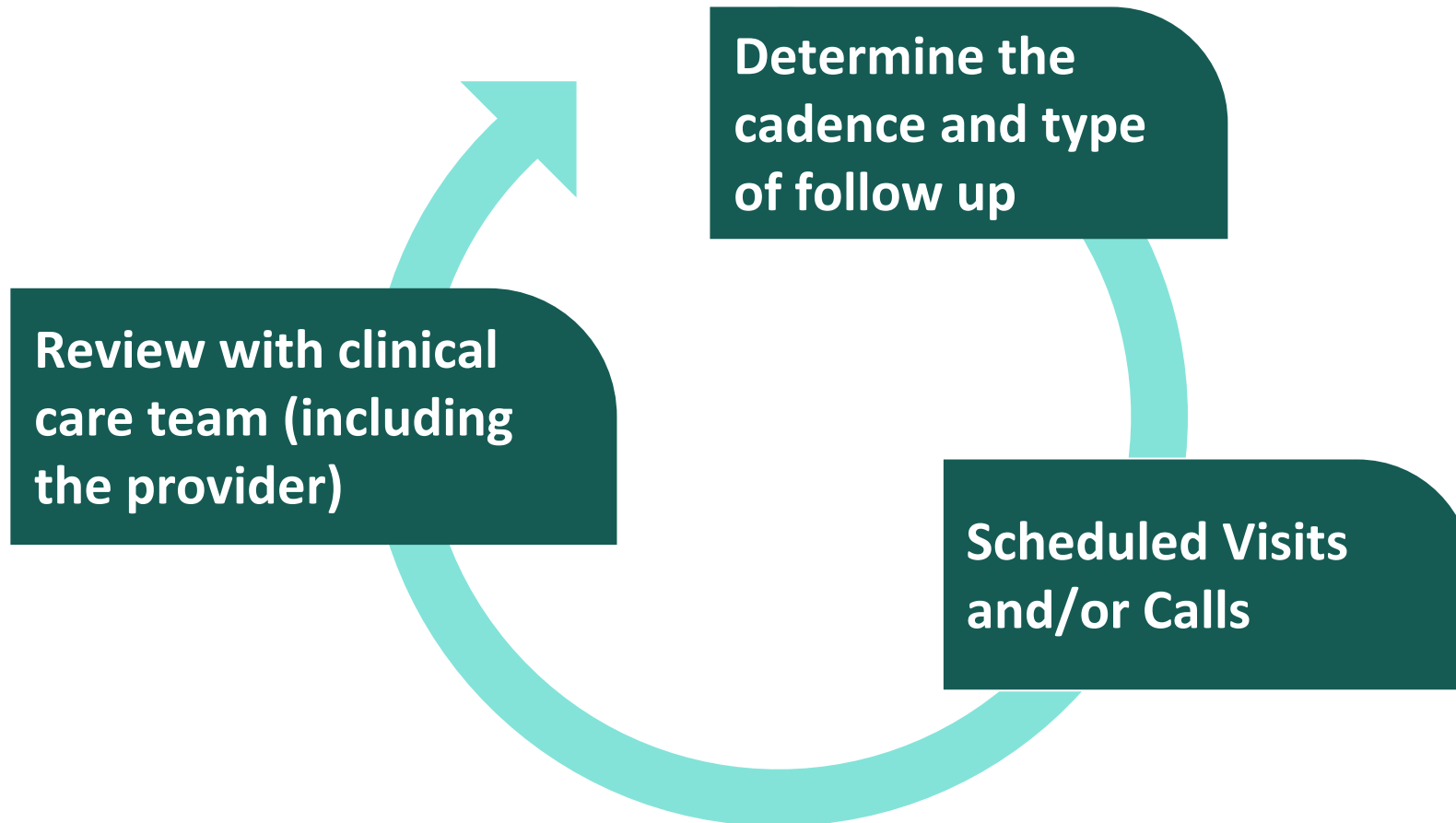


Care Management Process



- Implement the Plans of Care through scheduling follow up interactions, continuously re-assessing the patient's progress.

Implementation: Follow Up and Monitoring



Follow-Up and Next Interaction: Frequency

The follow up plan is based on patient level of:

- Risk
- Safety issues
- Changes in condition or care: new diagnosis or medication
- Treatment to target goals/trend
- Self-management abilities
- Support needed to accomplish their goals

Schedule the next interaction, whenever possible!

- Consider the use of agenda setting to frame up the follow up visits

Relapse Prevention

How to maintain goals achieved

Warning signs

Coping skills

Contacts

- See handout with an example on the MiCCSI website

Reassessing when patients don't meet goals...

The patient's needs drive the approach.



- Achieving targeted goals in the Plans of Care
- Not the right goals; refocus
- Not engaging
- Not progressing; identify barriers
- Transition to another level of care
- Different service or specialty

Key Takeaways

- Implementation of the Plans of Care involve:
 - A clearly outlined, hopefully pre-scheduled set of visits
 - Goal re-assessment at every visit
 - “Guidance of the team reflects the needs of the patient”



Care Management Process



- Close care management support when the patient seems able to maintain and is consistently achieving goals.
- Patients can re-enroll as necessary.

Reasons for Case Closure

Reasons for case closure and discharge from care management support:

- Patient can be managed by the clinic
- Patient can self-manage
- Patient has met his/her goals
- Patient can maintain a good current state
- Patient moves out of region/state
- Patient is admitted to hospice care
- Patient declines further services
- Patient expires



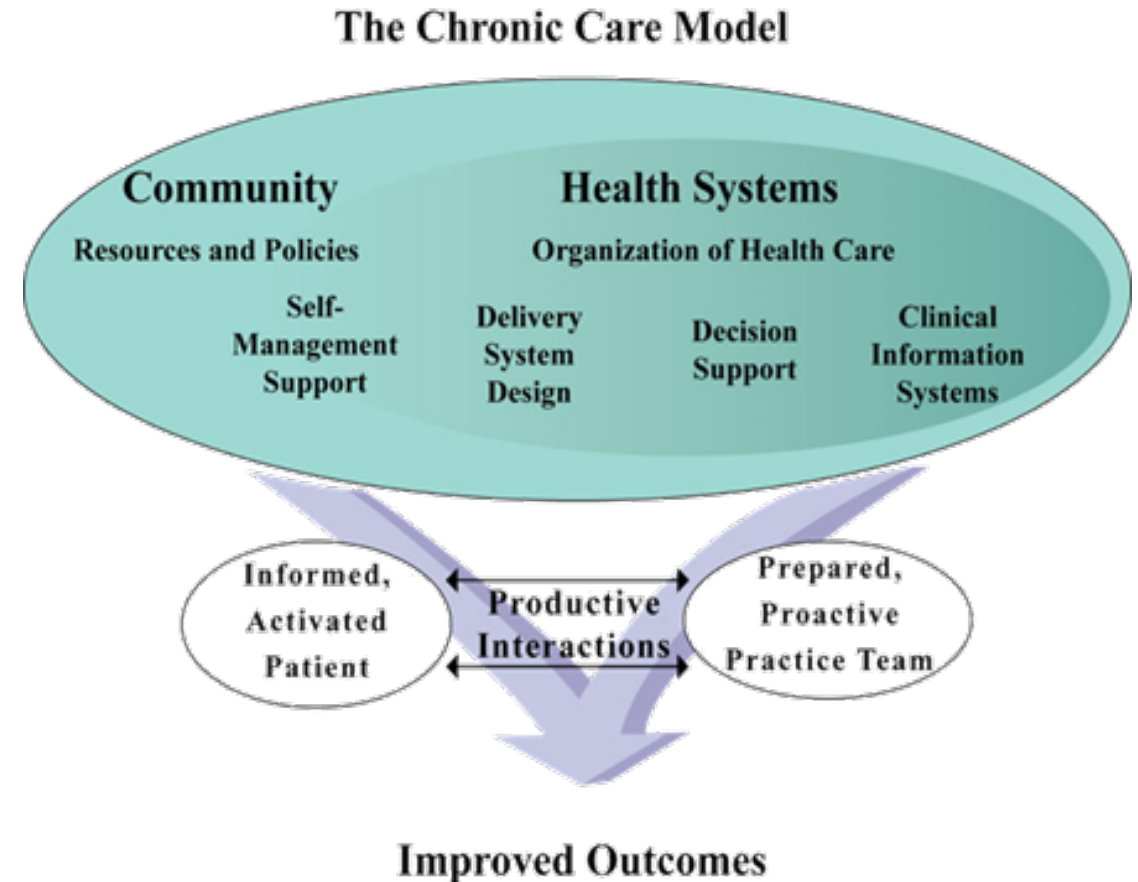
Discussion: What are other reasons?

Patient Can Self-Manage

“Informed and Activated Patient” was identified earlier in this course and is a critical component of the Chronic Care Model.

Practically, this means that the patient:

- Has the resources, knowledge to consistently manage his/her own care.
 - This might not mean perfection, but it does mean that the patient understands and has sufficient motivation to take care of themselves.
- Can problem-solve around their health care symptoms without needing additional guidance.
- Knows how to reach their care team for support as needed.



Developed by The MacColl Institute
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Communicating Case Closure

- Discuss case closure with provider and other members of the care team (both internal and external).
- Discuss with the patient.
 - Review the patient's journey: Lessons learned, goals achieved, symptom management plan.
 - Follow up with a letter that identifies how to get back in touch, as needed.
- Document within the record.
- Always keep the door open! The patient may need your services again.
- Review the ongoing support structure within the clinic and how the team will continue to support the patient, even if they're not specifically receiving care management support.



Post Case Closure

- Evaluate the impact of care management:
 - Did the patient get to target?
 - Lessons learned
 - Process improvement opportunities
 - Internal self-assessment for patient engagement skills
- How would patients be identified if they needed to be re-enrolled? (Keep the door open!)

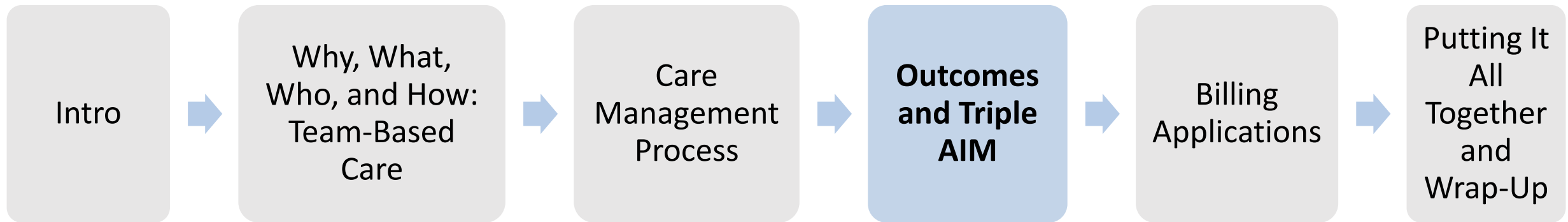


Key Takeaways

- Close care management support when the patient seems able to self-manage and is consistently achieving goals.
- Evaluate performance for opportunities.
- Patients can re-enroll as necessary.



Agenda



Outcomes Measures

- Better outcomes is part of the “Quadruple Aim”.
- Our primary objective is to help patients.
- Improving patient outcomes is why we practice in a team-based care model.
- Outcomes measures tell us if we have truly made a difference in patient care.



Quadruple Aim

Why: Connecting Heart

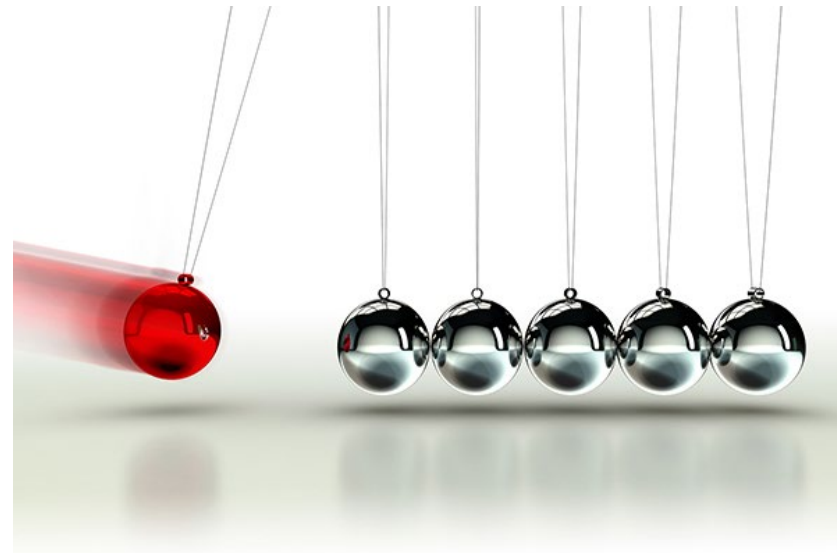
<https://www.youtube.com/watch?v=1ytFB8TrkTo&t=1s>

Think about a loved one or patient...

- **Step 1: Individually**
 - Please take about 30 seconds to think about a loved one or patient who had a difficult experience with lots of trips to the ER or hospital.
- **Step 2: Individually**
 - Now, please take 30 seconds to think about how your role or the role of others on the team could have changed that experience.
- **Step 3: Group sharing**
 - Could at least two (2) people share the patient/loved one experience and how they think this role could have helped them?

Impact of Meeting Outcomes

What is the impact of being intentional to treat-to-target?



Evidence Based Care Guidelines

- **Evidence-based care guidelines** are a set of interventions that have been proven to improve patient outcomes.
- **Outcomes measures** are derived from evidence-based guidelines as a way of measuring whether or not a program is actually improving population health.

Evidence Based Guidelines: Michigan Quality Improvement Consortium (MQIC)

- The Michigan Quality Improvement Consortium (MQIC) is a diverse group of physicians, payers, researchers, quality improvement experts, and specialty societies.
- MQIC was formed to establish and implement consistent, evidence-based clinical practice guidelines and performance measures with a focus on improvement and positive health outcomes.



The following guideline applies to patients with type 1 and type 2 diabetes mellitus. It recommends specific interventions for periodic medical assessment, laboratory tests and education to guide effective patient self-management.

Eligible Population	Key Components	Recommendation and Level of Evidence	Frequency
Patients 18-75 years of age with type 1 or type 2 diabetes mellitus	Periodic assessment	Assessment should include: Height, weight, BMI, blood pressure [A] Assess cardiovascular risks (tobacco use, hypertension, dyslipidemia, sedentary lifestyle, obesity, stress, family history, age > 40) Comprehensive foot exam (visual, monofilament, and pulses) [B] Screen for depression [D] Dilated eye exam by ophthalmologist or optometrist [B] , or if no prior retinopathy, may screen with fundal photography [B]	<ul style="list-style-type: none"> • Perform periodic assessment at least annually • Record BP at every visit • In the absence of retinopathy repeat retinal eye exam in 2 years
	Laboratory tests	Tests should include: A1C [D] Urine microalbumin measurement [B] (unless already on ACE or ARB) Serum creatinine and calculated GFR [D] Lipid profile [B] , preferably fasting Consider TSH and LFTs [D]	<ul style="list-style-type: none"> • A1C every 3-6 months based on individual therapeutic goal; other tests annually
	Education, counseling and risk factor modification	Comprehensive diabetes self-management education and support (DSME and DSMS) from a collaborative team or diabetic educator if available Education should be individualized, based on the National Standards for DSME ¹ [B] and include: - Importance of regular physical activity including interrupting sedentary periods at least every 90 minutes with physical activity, and a healthy diet [A] , and working towards an appropriate BMI - Assessment of patient knowledge, attitudes, self-management skills and health status; strategies for making health behavior changes and addressing psychosocial concerns [C] - Description of diabetes disease process and treatment; safe and effective use of medications; prevention, detection and treatment of acute and chronic complications, including prevention and recognition of hypoglycemia - Role of self-monitoring of blood glucose in glycemic control [A] - Cardiovascular risk reduction - Tobacco cessation intervention ² [B] and secondhand smoke avoidance [C] - Self-care of feet including nail and skin care and appropriate footwear [B] ; preconception counseling [D] ; encourage patients to receive dental care [D]	At diagnosis and as needed
	Medical recommendations	Care should focus on tobacco cessation, hypertension, lipids and glycemic control: - Medications for tobacco dependence unless contraindicated - Treatment of hypertension using up to 3-4 anti-hypertensive medications to achieve adult target of 140/90 mmHg [A] (see <i>MQIC hypertension guideline</i>). Mortality increases if diastolic is < 70. - Prescription of ACE inhibitor or angiotensin receptor blocker in patients with chronic kidney disease or albuminuria [A] ³ - Moderate intensity statin ^{4,5} therapy for primary prevention against macrovascular complications (e.g. simvastatin 20-40 mg, atorvastatin 10-20 mg) - For patients with overt CVD, high intensity statin (e.g. atorvastatin 40-80 mg) - Anti-platelet therapy [A] : low dose aspirin for adults with cardiovascular disease unless contraindicated. - Individualize the A1C goal ⁶ . Goal for most patients is 7-8%. Mortality increases when A1C is > 9% [B] . - Assurance of appropriate immunization status [Tdap or Td, influenza, pneumococcal vaccine (PCV13 and PPSV23), Hep B] [C]	At each visit until therapeutic goals are achieved

¹National Standards for Diabetes Self-Management Education and Support

²There is no evidence that e-cigarettes are a healthier alternative to smoking or that e-cigarettes can facilitate smoking cessation

³Consider referral of patients with serum creatinine value > 2.0 mg/dl (adult value) or persistent albuminuria to nephrologist for evaluation

⁴Diabetes Care, January 2015: Cardiovascular Disease and Risk Management

⁵2013 ACC/AHA Blood Cholesterol Guideline Table 5. High-, Moderate-, and Low-Intensity Statin Therapy

⁶Diabetes Care, Volume 38, Supplement 1, January 2015, S37, Table 6.2

Levels of evidence for the most significant recommendations: A = randomized controlled trials; B = controlled trials, no randomization; C = observational studies; D = opinion of expert panel

This guideline lists core management steps. It is based on the American Diabetes Association Standards of Medical Care in Diabetes - 2015; Volume 38, Supplement 1, Pages S1-S93 (<http://care.diabetesjournals.org>). Individual patient considerations and advances in medical science may supersede or modify these recommendations.

Approved by MQIC Medical Directors June 2008, 2010, 2012, 2013, 2014, 2015

MQIC Guideline: Example

Incentive Programs

BCBSM

Value Based Reimbursement (increase on every E&M code and PDCM code)

PDCM Encounters – (measured at practice level) for attributed population:

- 4% with 2 touches = 7% VBR

Adult Outcomes VBR (measured at subPO level):

- HbA1c control
- Blood pressure control
- ED encounters
- Inpatient encounters

Pediatric Outcomes VBR (measured at subPO level):

- ED encounters
- Inpatient encounters
- Pediatric quality composite

- To be eligible to earn outcomes VBR, practices must meet 1% outreach with 2 touches
- VBR = Value-Based Reimbursement; it's essentially an increase in payment on every office visit and PDCM code paid in a primary care office.
- These are subject to change every year – so keep in touch with your PO for updates!

Priority Health

- Annual PMPM incentive payment if outreach achieved for 2- 5% of the patient population.
- 2 billed codes on different dates of service.
- Fee For Service on all codes billed.
- No patient co-pay.

2023 BCBSM PDCM Outcomes VBR – Adult

Payment Period: 09/1/2024-08/31/2025

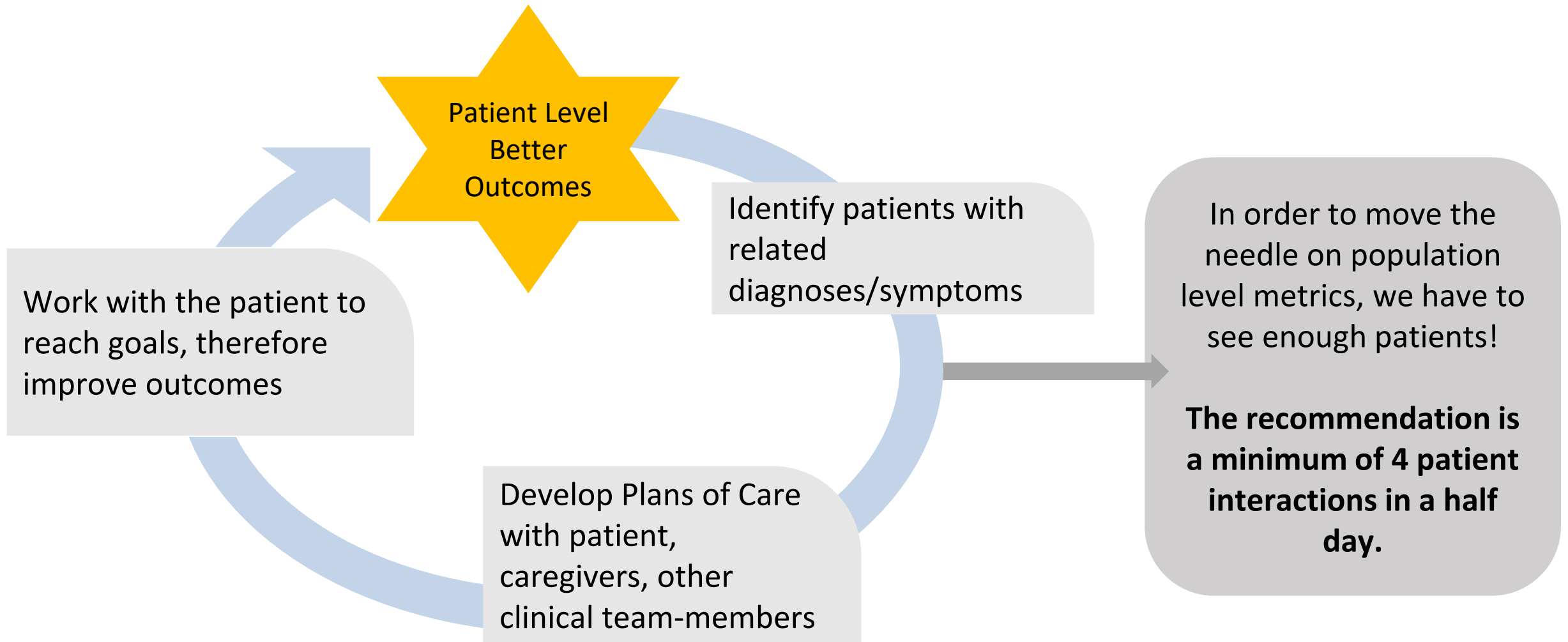
Measure	Performance Threshold	Improvement Percent
ED Visits (per 1000 members per year)	165	10%
IP Discharges (per 1000 members per year)	34	10%
Comprehensive Diabetes Control: HbA1c < 8%	72.2	10%
High Blood Pressure (<140/90 mm Hg for all adults age 18–64 with hypertension)	80.2	10%

2023 BCBSM PDCM Outcomes VBR - Pediatric

Payment Period: 09/01/2024-08/31/2025

Measure	Composite Measure	Performance Threshold	Improvement Percent
ED Visits (per 1000 members per year)	N/A	153	10%
IP Discharges (per 1000 members per year)	N/A	13	9%
Weight Management – age 5to 17 by 12/31/22	N/A	20%	5%
Follow-Up After Emergency Department Visit for Mental Illness	PEDCOMP1	0.720	N/A
Follow-Up Care for Children Prescribed ADHD Medication - Continuation and Maintenance Phase	PEDCOMP1	0.600	N/A
Asthma Medication Ratio - 5 to 11 Ratio > 50%	PEDCOMP1	0.960	N/A
Asthma Medication Ratio - 12 to 17 Ratio > 50%	PEDCOMP1	0.910	N/A

Impacting Outcomes: It Takes Quality & Quantity



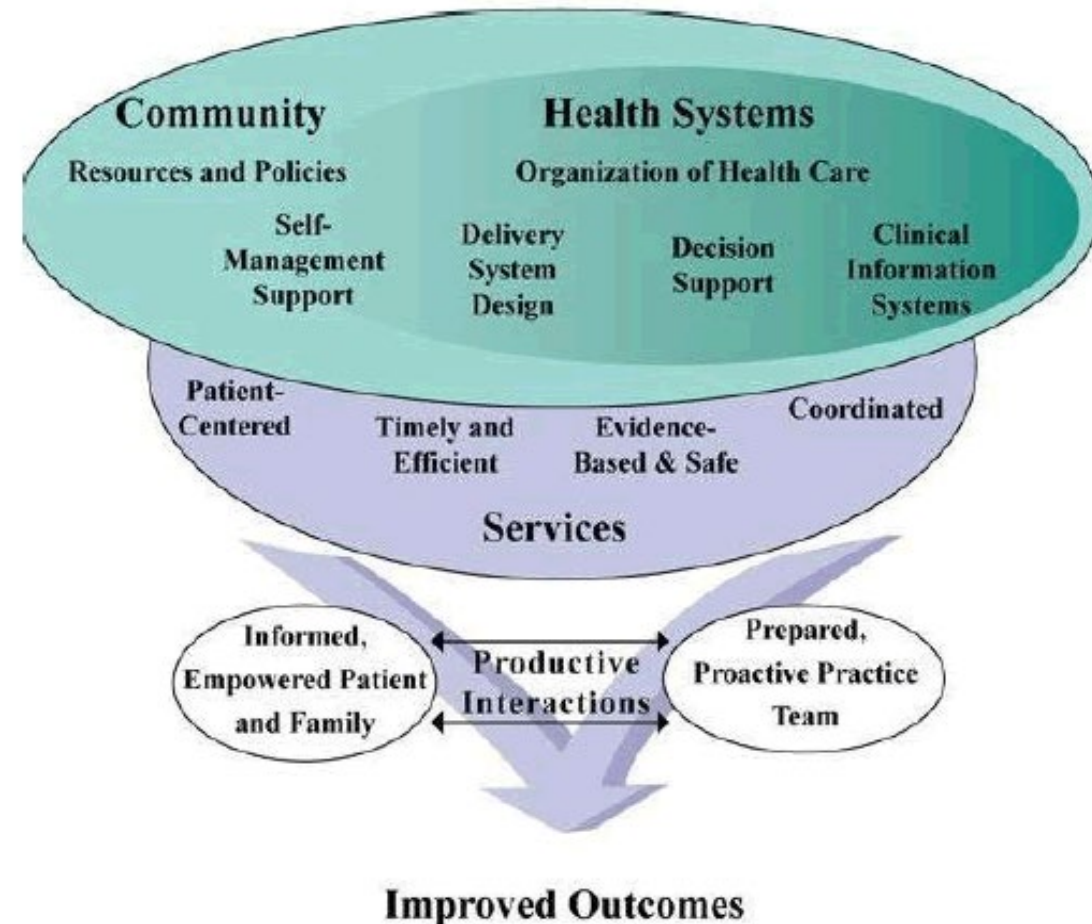
Tracking Quality to Evaluate Success

- Metrics resources:
 - EHR can provide a report on practice level performance
 - Registry can provide a report on metrics
 - List by payer or practice.
 - List of patients who are not in control or who are missing evidence-based care
- Payer reports and websites will additionally show your performance and the list of patients with a 'gap' in their care

Activity: How does your clinic track quality metrics?

How can Care Team Members impact outcomes goals?

1. Know your outcomes and where the team is in achieving their goals.
2. Proactively engage with patients who would contribute to improvement in the measure.
3. Design a patient-centered process that supports timely and evidence-based care.



Tracking Utilization

- Admission/Discharge/Transfer notifications can be tracked over time.
- Payer Reports can be used both as a way to identify patients and to follow performance over time.

BCBSM: Consolidated Dashboard, a PO level report, twice a year

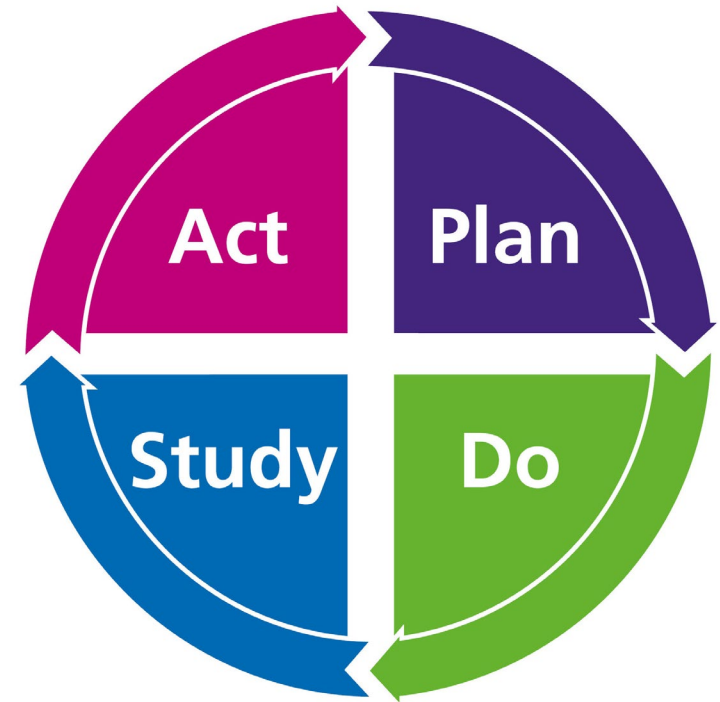
BCN: HealtheBlue (HeB), provides a utilization report

Priority Health: File Mart on the Priority Health website



Patient-Centered, Evidence-Based Processes

- In all models of care, it's important to take an active interest in *how* we things to make sure we're providing consistent and effective care.
- The “PDSA” or Plan, Do, Study, Act model is a simple method of process improvement.

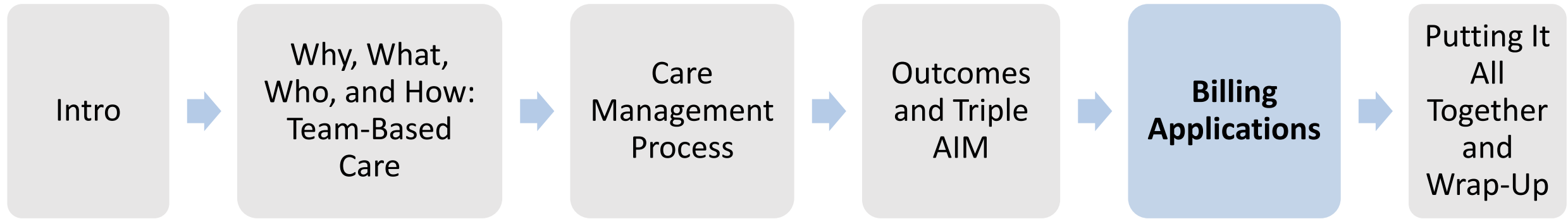


Key Takeaways

- Care teams can impact outcomes by using evidence-based care, productive interactions with patients and implementing the care management process.
- Adult and Pediatric populations have specific metrics that measure and track overall performance and improvement.
- Productive interactions with sufficient numbers will impact outcomes.



Agenda



Why is billing important?

- Billing for services and being paid for services places value on the patient care that you provide.
- Billing, along with care management incentive programs, is how team-based care can be sustainable.
- Sustainability comes from:
 - Seeing enough patients in a day
 - Minimum of 4 on average per half day
 - Could include telephone, initial comprehensive assessments, or other virtual/face to face follow ups
 - Billing consistently for all billable services.

PDCM Procedure Codes

- G9001* - Coordinated Care Fee – Initial Assessment
- G9002* - Coordinated Care Fee – Maintenance or follow up (quantity billed >45 minutes)
- 98961* - Group Education 2–4 patients for 30 minutes (quantity billed)
- 98962* - Group Education 5–8 patients for 30 minutes (quantity billed)
- 98966* - Phone Services 5-10 minutes
- 98967* - Phone Services 11-20 minutes
- 98968* - Phone Services 21-30 minutes
- 99487* - Care Management Services 31-75 minutes per month (care coordination in the medical neighborhood)
- 99489* - Care Management Services, every additional 30 minutes per month (care coordination in the medical neighborhood)
- G9007* - Team Conference
- G9008* - Physician Coordinated Care Oversight Services (physician only service and can only be billed by the physician)
- S0257* - End of Life Counseling

**HCPCS Level II and CPT codes, descriptions and two-digit numeric modifiers only copyright 2019 American Medical Association. All rights reserved*

Major Differences between Payers

BCBSM

- BCBSM removed the distinction between lead care managers and qualified health professionals – now they simply have “physicians” and “care team members”
 - Care team members are either licensed (e.g., social workers, nurses) or unlicensed (e.g., MAs, CHWs).
- The care team can be comprised of any health care or behavioral health professional the provider believes is qualified to serve on the care team.

Priority Health

*QHPs include: RNs, certified NPs, PA-Cs, licensed Master social workers (LMSWs), psychologists (LLPs and PhDs.), certified diabetic educators (CDEs), Registered Dietitians, Masters'-trained nutritionists, clinical pharmacists and respiratory therapists.

G9001 Comprehensive Assessment Code

BCBSM		Priority	
Licensed	X	QHP	X
Unlicensed MA, CHW			

- **BCBSM**
 - Individual, face to face (or video for commercial)
 - One per patient per day
- **Priority Health**
 - Individual, face to face
 - May be billed once annually for patients with on-going care management.

Codes for Care Team Members:

BCBSM		Priority	
Licensed	X	QHP	X
Unlicensed MA, CHW			

Coordinated Care w/ patient

G9001 - Initiation of Care Management (Comprehensive Assessment)
G9002 – Maintenance

Group Visits w/ patient

98961 - Education and training for patient self-management for 2–4 patients; 30 minutes
98962 - Education and training for patient self-management for 5–8 patients; 30 minutes

Counseling Advanced Directive

S0257 - Counseling and discussion regarding advance directives or end of life care planning and decisions

Member liability if patient does not have the Care Management Benefit.

G9001 Comprehensive Assessment Code

BCBSM		Priority	
Licensed	X	QHP	X
Unlicensed MA, CHW			

The **Comprehensive Assessment (G9001)** is a meeting which results in a patient-centered care plan that the care team and the patient agree upon and follow.

- The comprehensive assessment is a holistic approach and involves screenings (ex. SDOH, PQ 2), understanding and discussion of patient’s concerns/goals and the medical treatment plan.
- The care plan:
 - Guides the patient and caregiver towards self-management
 - Requires monitoring and evaluation of the effectiveness of the plan over time
 - Adjust goals and interventions as needed, until goals are met

G9001 Comprehensive Assessment Code

BCBSM		Priority	
Licensed	X	QHP	X
Unlicensed MA, CHW			

- **BCBSM**
 - Individual, face to face, video, or *phone
 - One per patient per day
- **Priority Health**
 - Individual, face to face*
 - May be billed once annually for patients with on-going care management

*During pandemic, video allowed

G9002 Maintenance Visit Code

BCBSM		Priority	
Licensed	X	QHP	X
Unlicensed MA, CHW			

BCBSM (Commercial and Medicare Advantage):

Quantity Billing

- Individual, face to face, video, or phone
- If the total cumulative time with the patient adds up to:
 - 1 to 45 minutes, report a quantity of one; 46 to 75 minutes, report a quantity of two; 76 to 105 minutes, report a quantity of three; 106 to 135 minutes, report a quantity of four.

Priority Health (Commercial, Medicare Advantage, Medicaid):

No Quantity Billing

- In person visit with patient, may include caregiver involvement.*
- Used for treatment plan, self management education, medication therapy, risk factors, unmet care, physical status, emotional status, community resources, readiness to change.

* During pandemic, video allowed

BCBSM: 2P Modifier for G9002- Payable when contact is made with patient to discuss the program and patient does not enroll in care management

Coordinated Care Codes with Patient

BCBSM		Priority	
Licensed	X	QHP	X
Unlicensed MA, CHW			

G9001 Comprehensive Assessment

- Results in a care management plan that all care management team members and the patient will follow.
- This is a holistic, encompassing type of patient visit that helps define a significant change in how the patient approaches managing their health: new diagnosis, transition of care, addressing a symptom that requires a significant change to the previous care plan.

G9002 Maintenance

- Focused on addressing a piece of the care management plan.
- This type of visit should additionally address patient goals and a follow up plan.

98961, 98962 Group Education Code

- **98961 Group Education**
 - 2-4 patients for 30 minutes
 - Face to Face with patient or caregivers
 - Quantity bill per 30 minutes
- **98962 Group Education**
 - 5-8 patients for 30 minutes
 - Face to Face with patient or caregivers
 - Quantity bill per 30 minutes

BCBSM		Priority	
Licensed	X	QHP	X
Unlicensed MA, CHW			

S0257 End of Life Counseling Advanced Directive Discussion Code

BCBSM		Priority	
Licensed	X	QHP	X
Unlicensed MA, CHW			

Individual face to face, video or telephone

- **BCBSM:** one per day
- **Priority:** no quantity limits

Note that physicians can also bill this code. It differs from the 99497 and 99498 codes, which are for physicians and require that the forms for ACP be completed.

S0257 Counseling/Discussion for Advanced Directives Code

BCBSM		Priority	
Licensed	X	QHP	X
Unlicensed MA, CHW			

Discussion with patient/caregiver may include one of the following:

Share information and answering questions: “what is an advance directive?”, “what is advance care planning? what is Physician Orders for Life Sustaining Treatment (POLST)?

Patients wishes:

- Types of medical care preferred
- Comfort level that is preferred
- Identify a person to make decisions for the Patient if the Patient cannot speak for him or herself
- How the patient prefers to be treated
- What the patient wishes others to know

Individual face to face, video or telephone

- **BCBSM:** one per patient per day
- **Priority:** no quantity limits

Care Management Codes for: QHPs, Licensed, and Unlicensed

BCBSM		Priority	
Licensed	X	QHP	X
Unlicensed MA, CHW	X		

Telephone with patient

98966: Telephone assessment 5-10 minutes of medical discussion

98967: Telephone assessment 11-20 minutes of medical discussion

98968: Telephone assessment 21-30 minutes of medical discussion

Care Coordination (not with patient or provider)

99487: First 31 to 75 minutes of clinical staff time directed by a physician or other qualified healthcare professional with no face-to-face visit, per calendar month

99489: Each additional 30 minutes after initial 75 minutes of clinical staff time directed by a physician or other qualified healthcare professional, per calendar month. (An add-on code that should be reported in conjunction with 99487)

BCBSM: 2P Modifier for 98966, 98967, 99868
Payable when contact is made with patient to discuss the program and patient does not enroll in care management.

Member liability if patient does not have the Care Management Benefit for BCBSM.

98966, 98967, 98968 Phone Service Codes

Call with patient or caregiver to discuss care issues and progress towards goals.

98966 for 5-10 minutes

98967 for 11-20 minutes

98968 for 21-30 minutes

BCBSM: 2P Modifier for 98966, 98967, 98968 - Payable when contact is made with patient to discuss the program and patient does not enroll in care management

BCBSM		Priority	
Licensed	X	QHP	X
Unlicensed MA, CHW	X		



99487, 99489

Care Coordination Codes

BCBSM		Priority	
Licensed	X	QHP	X
Unlicensed MA, CHW	X		

Call on behalf of the Patient to coordinate care.

- **99487** for first 31 to 75 minutes of clinical staff time working on behalf of the patient with someone other than the patient or provider.
 - Examples: coordinating DME for a patient; reaching out to a resource to help support a SDOH need.
- **99489** for each additional 30 minutes after 75 minutes per calendar month.

Codes for Providers/Physicians

Care Team Member and Provider Discussion

Physician discussion with patient, other physicians, extended care team members not part of the care team.

End of Life Counseling Advanced Directive

G9007: Coordinated care fee, scheduled team conference

G9008: Physician Coordinated Care Oversight Services (Enrollment Fee)

S0257: Counseling and discussion regarding advance directives or end of life care planning and decisions

BCBSM member liability if patient does not have the Care Management Benefit.

Provider Code: G9007 Team Conference Code

- PCP and a care team member formally discuss a patient's care plan.
- Can be billed once per day per patient regardless of time spent.
- May be billed by a physician or APP.



Physician Code: G9008 Physician Coordinated Care Oversight Services (Enrollment Fee)

BCBSM

- Once per day, but no quantity limit.
- May be conducted face to face, via video, or by telephone. This does not include email exchange or EMR messaging.
- Communication with paramedic, patient, other health care professionals not part of the care team when consulting about patient who is engaged in care management.

Priority Health

- One time per practice.
- Only be conducted face to face. May be done virtually
- Can only be billed when the physician has discussed the care plan with the patient and if the licensed care team member has had a face to face with the patient on or before the day of the physician's discussion with the patient.

Major Differences between Payers (cont.)

G9001 (NOT BILLABLE BY PHYSICIAN)

BCBSM: Billed per practice/per patient/per qualified licensed care team member.

Completed via telephone only if patient declines in person office visit due to discomfort presenting to office

PH: Billed Annually only per qualified licensed care team member

G9008 (BILLABLE BY PHYSICIAN ONLY)

BCBSM: No quantity limit. Physician discussion with paramedic, patient, or other health care professionals not part of the care team. Does not require patient to be involved.

PH: Limited one per practice/ per patient. Coordinated care delivered by a physician which must include patient and other health care professionals involved in oversight of services.

98961 and 98962 Group Education - (NOT BILLABLE BY PHYSICIAN)

BCBSM: May quantity bill per 30-minute increments. Completed via telephone only if patient declines in person office visit due to discomfort presenting to office

PH: These codes are not included within incentive program effective 2022.

Update on BCN and BCN Advantage

MARCH-APRIL 2023

Patient
Care/
Quality

Cover Story

Network Operations

BCN Advantage

Patient Care/Quality

Behavioral Health

Pharmacy News

Billing Bulletin

Provider-Delivered Care Management expands to BCN and BCN AdvantageSM

Effective January 1, 2023, if you are a Patient-Centered Medical Home designated provider, or mid-level provider billing under a PCMH-designated provider, you can bill for provider-delivered care management services for Blue Care Network and BCN Advantage members.

You can now use the same PDCM codes you currently use with your Blue Cross Blue Shield of Michigan PPO members for your BCN and BCN Advantage members.

These codes are:

- HCPCS Codes: G9001, G9002, G9007, G9008, S0257
- CPT Codes: *98961, *98962, *98966, *98967, *98968, *99487, *99489

We published an introductory article about PDCM in the **Jan.-Feb. 2023 issue of BCN Provider News, on page 16.**

As mentioned in the article, some self-funded employer groups may elect to not participate with the PDCM program. FCA's new Healthy Blue ChoicesSM POS health plan has chosen not to participate in PDCM.

If you have questions about PDCM, you can contact valuepartnerships@bcbsm.com.

Nonclinical, transitional care program available to members discharged to additional post-acute care facilities

In 2021, we announced that Blue Cross Blue Shield of Michigan and Blue Care Network had contracted with naviHealth to reduce avoidable inpatient readmissions through a nonclinical, transitional care program.

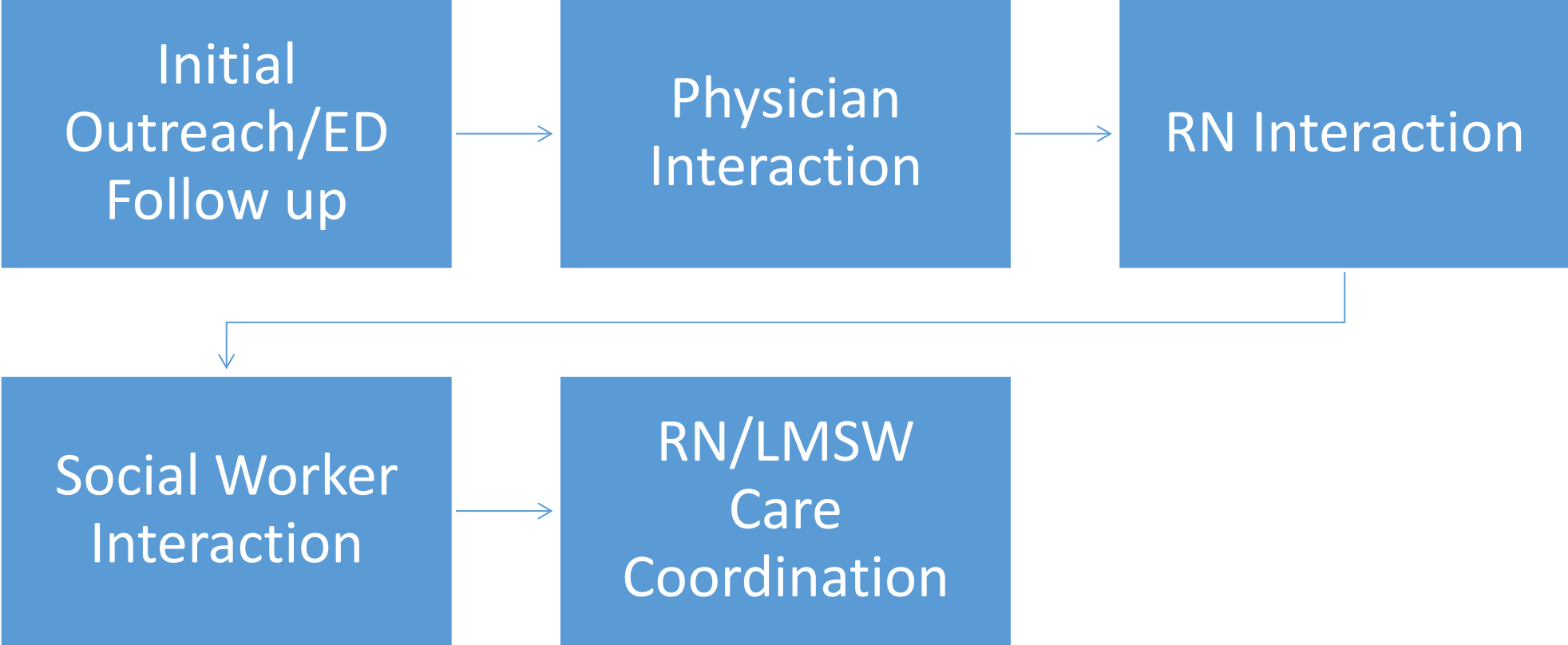
This program is available to Medicare Plus Blue and BCN Advantage members who are discharged from inpatient acute care facilities in Michigan directly to their homes or to certain post-acute care facilities.

On Jan. 1, 2023, this program expanded to include members who are discharged to additional post-acute care facilities. To view the list of post-acute care facilities that participate in this program, see this **provider alert**.

For details about the nonclinical, transitional care program, see the November 2021 **Record article** or the November-December 2021 **BCN Provider News** article.

naviHealth is an independent company that provides select care management services for Blue Cross Blue Shield of Michigan and Blue Care Network members who have Medicare Advantage plans.

Overview of Example Patient Interaction



Patient Interaction Example

Tara is a 43-year-old woman

- **Past Medical History:** Type 2 diabetes, depression, anxiety, hypertension, GERD, tobacco use, obesity
- **Social History:** recently divorced, has one school aged child, lives in an apartment with monthly rent and works full-time outside of the home
- **Current Needs:** dietary needs (pertinent to HTN & diabetes), has traditional BCBSM, her insulin and diabetic testing supplies are expensive with insufficient pharmacy coverage
- **Presenting to the PCP:** she has not been seen in the clinic in over a year, during that time she has presented to ED 6 times within the past 3 months

Physician Interaction Outcomes

Based on complexity of needs, Physician would like to involve the clinic care manager to continue the visit so patient does not need to come back at another time (and reduce the number of times she has to come to the office).



“I’d like to enroll you in our CM program. I’d also like you to see our social worker. It sounds like you have a lot that may be distracting you from your health.”

Patient Interactions

Physician addresses with patient:

- Frequent ED visits
- Gaps in Care
- Inquires about diabetes management

Physician orders:

- Mammogram, and flu shot for gaps in care
- Labs (for diabetes)

Based on physician referral:

- Social Worker discusses anxiety and depression
- RN discusses physician orders and goals of care

Care Coordination

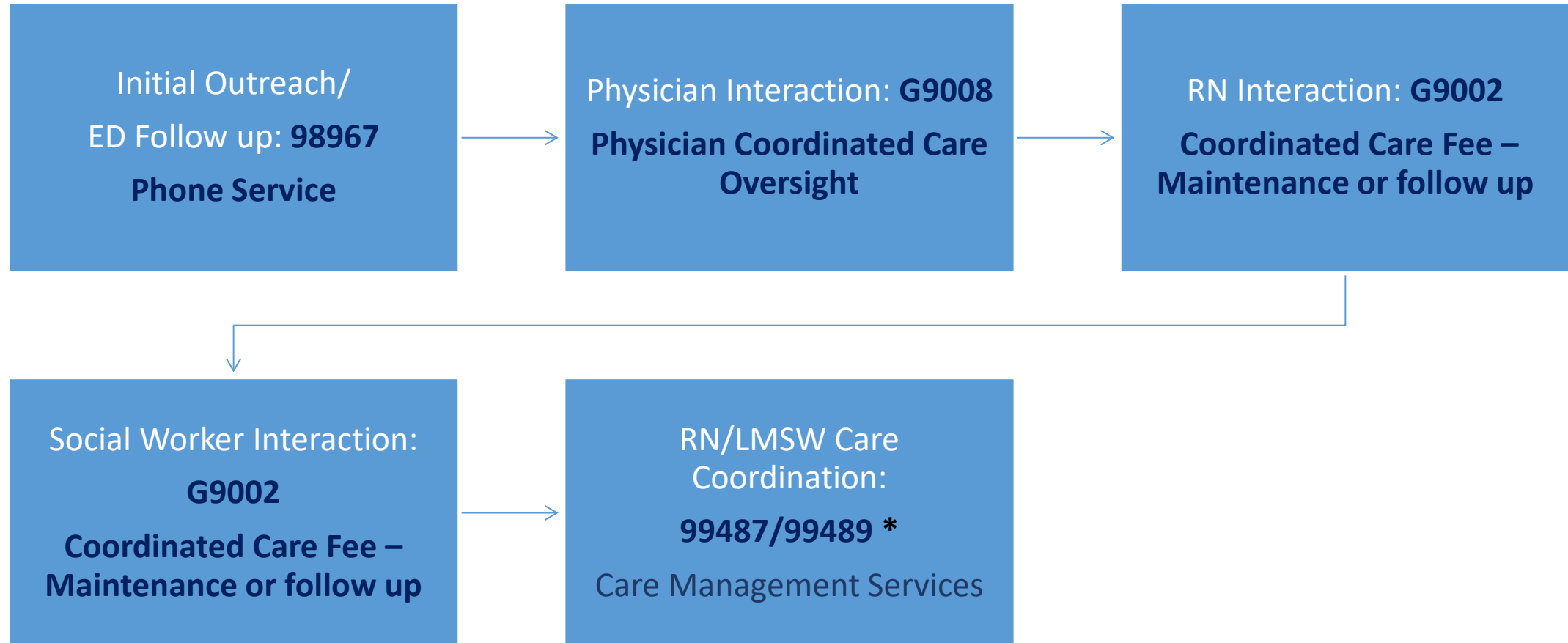
RN addresses:

- Contacts DME provider to assist with obtaining new supplies – Glucometer
- Inquires about diabetic education class
- Discussion with dietician

LMSW coordinates services:

- Community resources: contacting agencies for assistance with child care
- Behavioral health referral: coordinating appointment
- Connecting with legal aid
- Child care

Example Patient Interaction: Codes



* Depending on quantity for the month

High Risk Patient

Identify the codes:
G9007, G9001

- Patient is flagged as high risk by a payer list.
- Care manager discusses overall care plan goals with provider, and it is determined the patient is appropriate for care management.
- Care manager reviews the chart, recent screenings (SDOH, PHQ-9), problem list, medications, and utilization history.
- Care manager sees the patient in a face-to-face visit, patient agrees to care management. CM evaluates the patient's current ability to steward completing the comprehensive assessment.
- Patient develops a SMART goal, and the care manager connects the patient with various resources that address identified barriers.
- Care manager discusses care plan with the provider. Provider agrees with the care plan.
- Patient and care manager agree on a follow up plan.
- Care manager documents in the chart and adds the appropriate billing codes.

Identify the code:
99487

Coordination of Care

- Care manager contacts the home health agency to schedule in-home visits and conduct a safety assessment.
- In addition, a call was made to the DME provider to arrange for delivery of home O2.
- Time spent coordinating care was over 30 minutes.

Gaps in Care

- RN notices during chart review that several of the patients who are enrolled in care management have not received their cancer screenings, even though the RN and provider reminded them.
- RN shows the list to the Medical Assistant.
- Per the Standing Agreement that has been put in place with the physician, the Medical Assistant calls the patient enrolled in care management to discuss gaps in care and facilitate closing the gaps.
Time more than 31 mins.

Advance Directives

End of Life

Identify the code: **S0257**

*Note: this code allows for phone visit and meeting may be with the patient, care giver, or family member.

- CM conducts a 20 minute in person meeting with a patient regarding their advance directives.
- During the discussion, information is given to the patient to review regarding advance directives.
- Discussion includes:
 - How the patient prefers to be treated.
 - What the patient wishes others to know.
- CM and patient agree to follow up via a phone call in 2 weeks.

Identify the code:
98966 BCBSM

Reducing ED visits

- Proactive patient education to consider the PCMH practice first for acute healthcare needs, suggesting nearby urgent care, or ED for true emergency.
- Follow up each ED visit with a call to identify issues, coordinate follow up care, and encourage seeking care through the practice rather than the ED when appropriate. Often, this can be performed by a medical assistant.
- Medical assistants, operating under a protocol, may call patients, ask if the ED physician recommended follow up care, coordinate the needed care, transfer to clinician for issues requiring immediate medical assessment or guidance, and encourage the patient to bring in all medications. Call takes 10 minutes.

Identify the codes:

3 patients 98961

6 patients 98962

Group Education Visit

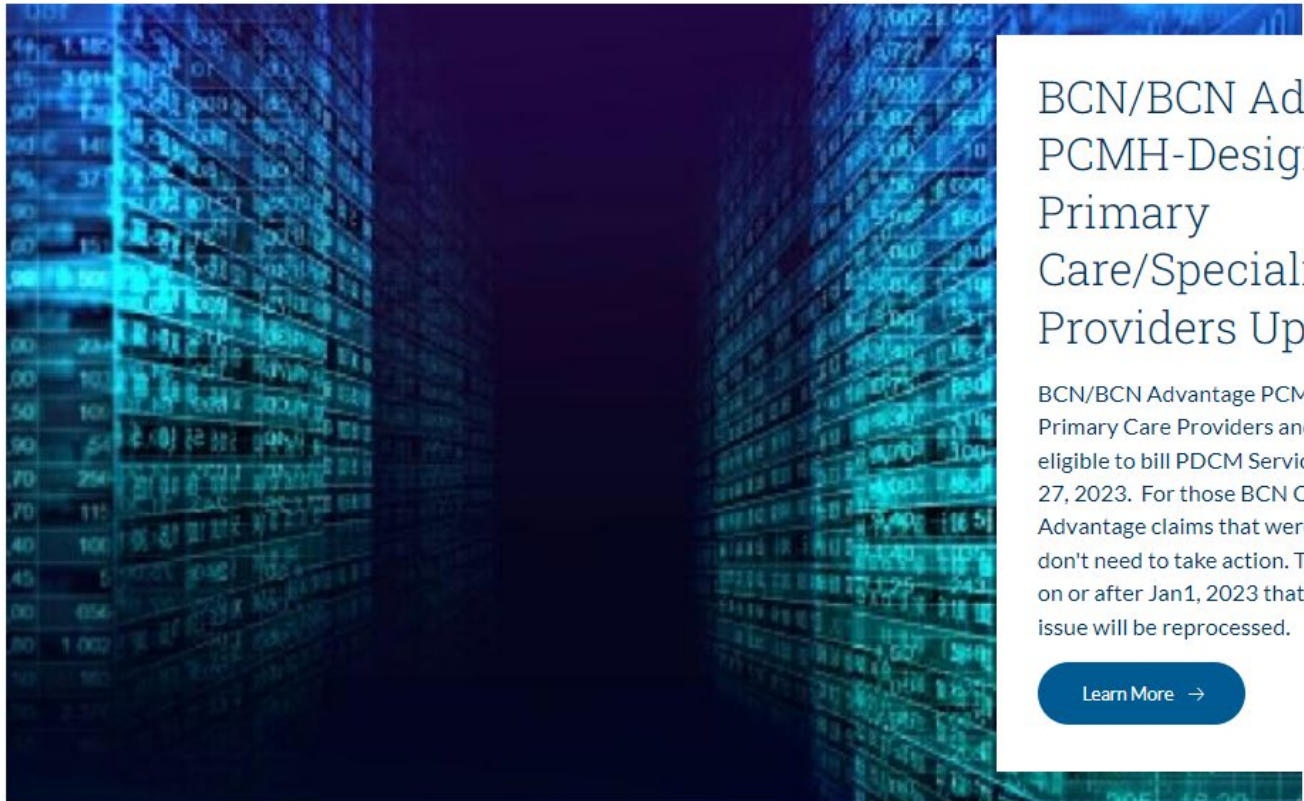
- Patient and caregiver indicate interest in Asthma Education class.
- Patient attends with caregiver with 3 other patients for 30 minutes.
- Patient attends a second class with 6 other patients for 30 minutes.

MICMT - Billing Resources



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Home Programs **Billing** Training Events Past Webinars About Contact



BCN/BCN Advantage PCMH-Designated Primary Care/Specialist Providers Update

BCN/BCN Advantage PCMH-Designated Primary Care Providers and Specialist are now eligible to bill PDCM Services effective March 27, 2023. For those BCN Commercial and BCN Advantage claims that were denied in error, you don't need to take action. The claims with DOS on or after Jan1, 2023 that were affected by this issue will be reprocessed.

[Learn More →](#)



Billing Resource

- Billing code descriptions, delivery methods and scenarios
- PDCM Reference Materials
- PDCM FAQ's

PDCM Billing Codes

G9001: Comprehensive Assessment

G9002: Maintenance

98966-98968: Telephonic

99487, 99489: Care Coordination (without patient)

G9007: Team Conference

98961, 98962: Group Education

G9008: Care Oversight

S0257: Counseling Regarding Advance Directives

PDCM Reference Materials

PDCM FAQs

CoCM Billing Codes

Collaborative Care Services

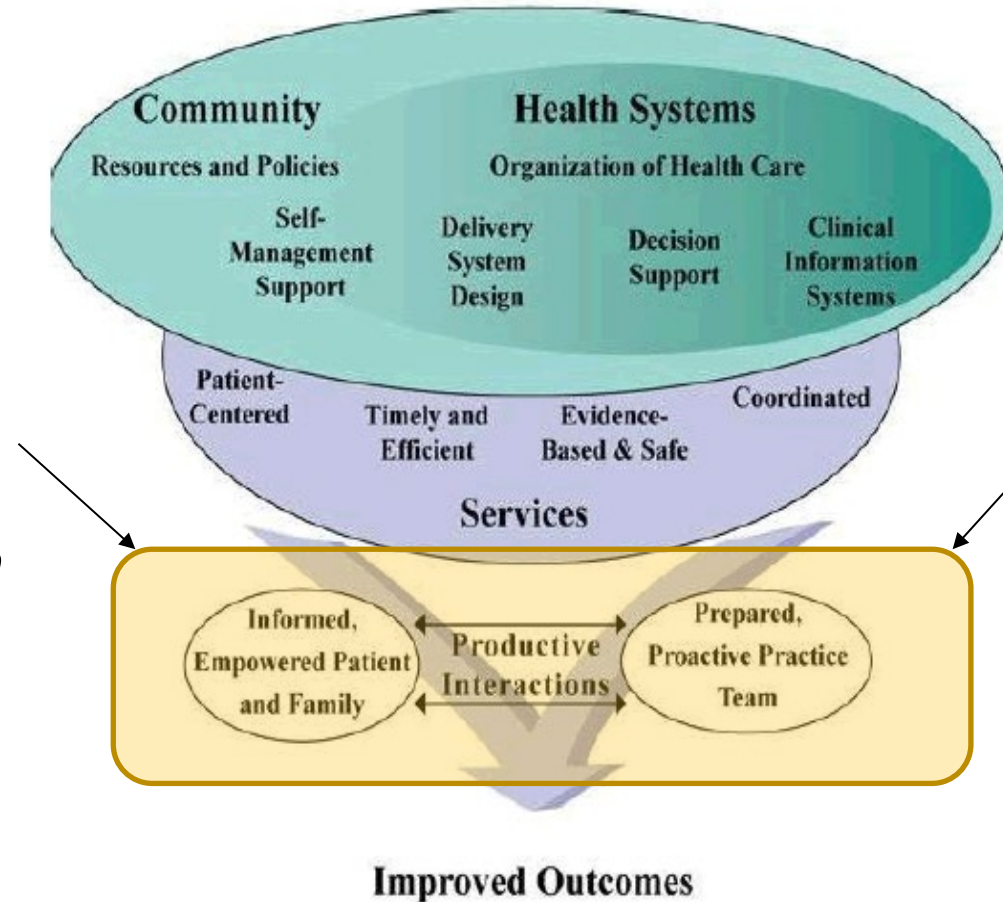
General Behavioral Health Integration

CoCM Reference Materials

CoCM Billing FAQs

Productive Interactions, Outcomes, and Sustainability

Many productive interactions with individual patients will lead to improved outcomes that can be measured at a *population level*.



Productive interactions are also *billable* interactions, which supports the sustainability of the care management program through payments and successful incentive program participation.

Frequent Asked Questions

Q: How can I get reimbursed for time spent coordinating services with other providers/services (i.e., home health, specialty offices, community resources, etc.)?

A: When providing non-face-to-face clinical coordination with the patient centered medical neighborhood, a care team member can add up time spent within a calendar month and bill using codes: 99487 and 99489.

Q: Do Z codes count as primary diagnoses?

A: Yes

Q: Can a care team member bill if the initial assessment was completed and a patient declines services?

A: A provider may bill once per condition, per year when a PDCM program is discussed with a patient and patient declines engagement.

Q: Can a care team member bill for advance care planning conversations?

A: Yes, care team members who complete end of life (advance care planning) conversations with either the patient or “surrogate” can bill S0257.

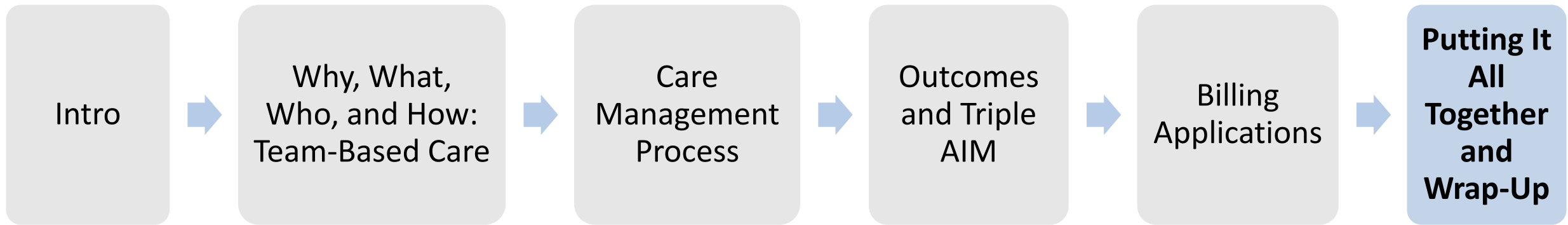
Q: Can care management services be billed the same day the patient sees the physician?

A: Yes

Q: Can care management services be provided and billed virtually?

A: Yes, services identified as virtual may require GT modifier.

Agenda



Role Play

- Patient Identification and Outreach
- Introduction of TBC concepts
- Establishing Patient Knowledge and Desire



Activity: Breakouts to Apply Key Skills Affiliated with TBC

Patient Identification and Outreach Group: The group develops scripting to use when outreaching to Judy Toody to rescheduled her diabetes check-up appointment.

- Address the reason for the call
- Be prepared to demonstrate empathy to Judy's recent loss
- Inquire on barriers to making the appointment

Describing TBC Group: The group, acting as the primary care provider, develops scripting to explain the multi-disciplinary approach to TBC and how this brings value to Judy.

The group also identifies ways for the provider to message the value of the team members Judy is being referred to. "Managing up" the team to demonstrate confidence in the extended team members.

Identifying Judy's Knowledge and Desire: The group, acting as the care manager, develops scripting to explore Judy's understanding of why she was referred, what her knowledge of the reason is, and based on this, where would Judy like to start with the care plan.

Team Care
Conference
on Judy

Participant for Team
Conference
Simulation Activity

Create an SBAR Format to
report out to others on the
team

What have we discussed?

We have covered four main topics:

1. The why, what, who, and how of successful team-based care.
2. The care management process: how to identify, assess and collaboratively create a plan of care, how to implement that plan of care, and how to close out a patient.
3. Outcome measures and how the care team member can improve the measures.
4. The importance and application of billing codes.



What will you start using in your role as care team member tomorrow?

Recommended Next Steps:

Seek to Understand:

- Does your practice conduct virtual and telehealth visits?
- What screening tools does your practice use?
- What clinical guidelines is the practice following?
- What outcome measures are your practice's area of focus?
- What role do you play in ensuring the metrics are being met?
- Can you shadow your team members?

Set yourself up for success:

- Prepare a team-based care elevator speech to engage the patient
- Identify the organizations expectations on caseload size, number of contacts per day and use of billing codes

Training Completion Next Steps

1. For this training, CE/CME are provided through MiCCSI.
 - a. After the training, the link to the evaluation will be shared in chat.
 - i. Click on the link and complete the evaluation
 - ii. After submitting the evaluation, you will be directed to the certificate for your license/role.
 - iii. The certificate will include your licensure information
 1. There are CE for Social Worker
 2. There are CME for providers and nursing
 3. CMA's, CNA's can use the general certificate and agenda for submission to your professional certification program
 - b. Questions regarding the training or CE/CME – contact Amy Wales at amy.wales@miccsi.org

Next Steps Training Credit and Compensation

1. **For BCBSM PDCM training requirements**, post-training steps must be completed via MICMT. This includes the completion of Introduction to Team-Based Care within six months of initiating billing of PDCM codes and annual completion of BCBSM Longitudinal Learning Credits.
 - a. Within 24 hours, (for those attending this training to meet the BCBSM PDCM Program requirements), your names will be submitted to MICMT.
 - i. You will receive an email with a link to the MICMT evaluation and post-test.
 - ii. As a reminder, completion of the MICMT evaluation and post-test is **required** to meet the BCBSM PDCM training requirements.
 1. A score of 80% or greater is required to meet the expectations.
 2. If you do not receive an 80%, you can retake the post-test.
 3. The evaluation and post-test must be completed within **5 business days** of attending the training.
 4. Upon completion, you will receive a certificate of completion. This is proof of successful completion of the training and will be used to confirm that you have met the training requirements for the BCBSM PDCM program.
 5. The CE/CME information is on the certificate from MiCCSI.
 - b. Questions regarding the post-training requirements for the BCBSM PDCM Program – contact MICMT at micmt-requests@med.umich.edu.

What's Next – Additional Training Opportunities

- [Patient Engagement Training](#): learn how to use evidence based motivational interviewing and self-management support skills to engage with patients. This training is reimbursable to your affiliated Physician Organization.
- [CM Fundamentals MICMT Webinar Series](#): participate in monthly on-going educational webinars for care management teams new to their role by addressing topics relevant to their daily work.
- [General MICMT Webinar Series](#): participate in multiple monthly webinars on various topics.

MICMT webinars are free of charge and recorded/posted to the [MICMT website](#). Feel free to send MICMT your ideas at micmt-requests@med.umich.edu.

For additional information on the [Training Framework](#) and [Training Opportunities](#)

Successful Completion of Introduction to team-based Care includes:

- Completion of the one day in-person/virtual training.
- Completion of the Michigan Institute for Care Management and Transformation (MICMT) post-test and evaluation.
- Achieve a passing score on the post-test of 80% or greater. *If needed, you may retake the post-test.

You will have (5) business days to complete the post-test.

Contact Us

micmt-requests@med.umich.edu



Resources

MICMT Resources

<https://micmt-cares.org/>

MICMT
Michigan Institute for Care Management & Transformation

Log in search

HOME ABOUT PROGRAMS TRAININGS RESOURCE LIBRARY NEWS & EVENTS EVALUATION & ASSESSMENT

**ADVANCING
TEAM-BASED CARE**

SHARING
best practices with statewide partners to improve and expand throughout Michigan.

ENGAGING
providers through trainings, resources, and toolkits.

MEASURING
impact on quality and utilization services.

Additional Resources on Huddles and Meetings

Creating Patient-centered team-based Primary Care

<https://pcmh.ahrq.gov/sites/default/files/attachments/creating-patient-centered-team-based-primary-care-white-paper.pdf>

UCSF Center for Excellence in Primary Care- Healthy Huddles

<https://cepc.ucsf.edu/healthy-huddles>

Huddles: Improve Office Efficiency in Mere Minutes

<https://www.aafp.org/fpm/2007/0600/p27.html>

IHI Optimize the Care Team Communication

<http://www.ihl.org/IHI/Topics/OfficePractices/Access/Changes/IndividualChanges/UseRegularHuddlesandStaffMeetingstoPlanProductionandtoOptimizeTeamCommunication.htm>

MICMT Website Online Resources

- [Care Manager Introduction Phone Script](#)
- [Care Management Explanation Flyer](#)
- [Share the care: Assessment of Team Roles and Task Distribution](#)
- [Michigan Community Resources](#)
- [MDHHS Community Mental Health Services Programs](#)
- [Michigan 2-1-1 Informational Guide](#)

Resources: Care Management Services

- [Michigan Institute for Care Management and Transformation](#)
- BCBSM
 - [PDCM Billing online course](#)
 - [PDCM Billing Guidelines for Commercial](#)
 - [Medicare Advantage](#)
- [Priority Health](#)
- Centers for Medicare & Medicaid
 - [Chronic Care Management](#)
 - [Behavioral Health Integration](#)

Other Training Options and Strategies for Patient Engagement

Trainings / Courses

- [Patient Engagement Course](#)

Webinars

- [Care Management Fundamentals: Motivational Interviewing Skill-Building](#)
- [Care Management Fundamentals: Motivational Interviewing Advanced Skill-Building](#)
- [Motivational Interviewing in Team-Based Care: The Secret Weapon of Behavioral Change](#)

Resources

- [Readiness Ruler](#)
- [Taking Care of my Health Action Plan](#)