

Engaging Patients to Validate QI Processes Session #1

February 11, 2025

WELCOME EVERYONE!!



Who Is On This Journey with You?

Affinity Group Planning Team:

- Margaret Franckhauser, PHMI SME (Adult Preventive Care)
- Jen Powell, PT Coach and PHMI SME (Patient Engagement)
- Jackie Nuila, PHMI SME (Equity)
- Hithu Kodicherla, PHMI Program Manager
- Sandra Afful, PHMI Program Coordinator

PT Coaches:

- Lyn Yasumura
- Elena Thomas Faulkner
- Eugenia Black
- Claire Richardson
- Denise Armstorff

Session 1 Agenda

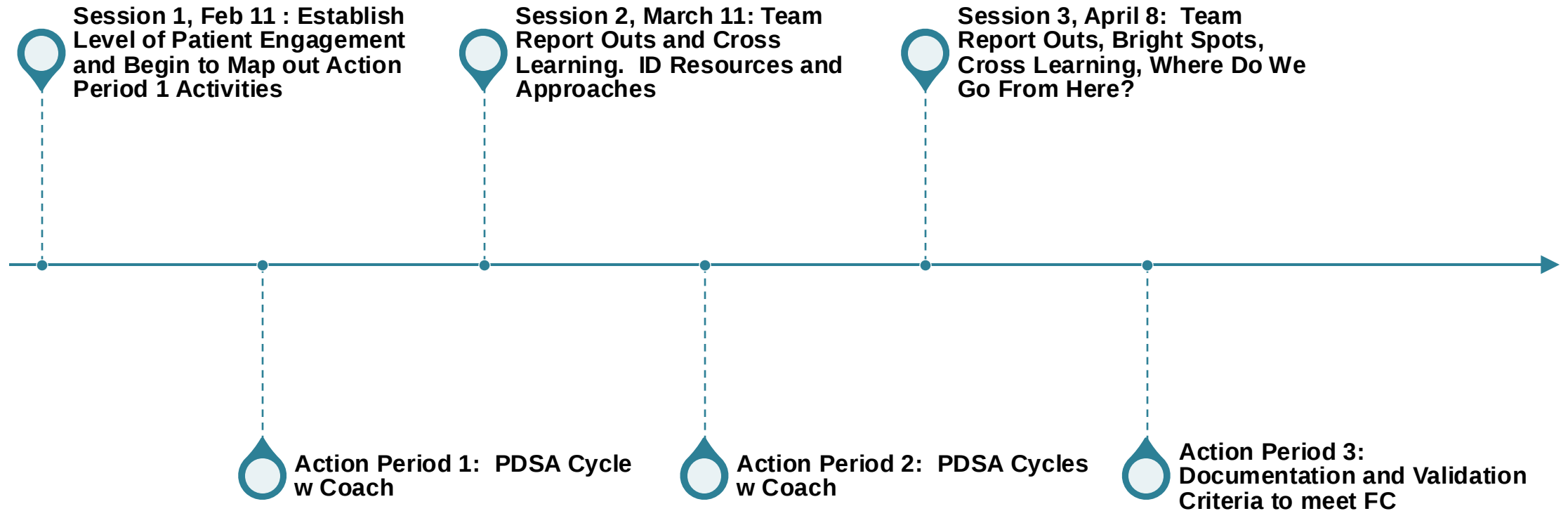
- Learning Objectives, Setting the Stage and Timeline
- PHMI's Three Levels of Patient Engagement
- CHC Team Time
- Share backs: Team Introductions & Report Out
- Next Steps/Wrap Up

Please rename with your full name and CHC affiliation

Affinity Group Learning Objectives

1. Advance your team's competency in engaging patients in QI/PHMI processes.
2. Accomplish the needed steps to validate this foundational competency.
3. Define meaningful patient engagement strategies to inform process improvement strategies.
4. Explore how patient engagement can serve as a tool to advance health equity.
5. Exchange insights and experiences with peers.
6. Explore actionable change ideas that can be tested.

Patient Engagement Strategies & Implementation Timeline



Foundational Competency

"Engage patients served by your practice to validate any of your proposed process improvements and to propose alternative methods to improve quality in your focus area."

Validation Criteria

A documented patient engagement process in your population of focus

Should include:

- A consideration of those who may be harmed by inequities.
- Where in the improvement process patient input (from patients in the PoF) is obtained
- How patient input is collected (e.g., patient advisory board with minutes, monthly call with notes, patient survey with results, focus group with notes, online surveys, surveys at the end of patient visits)
- How patient input is integrated
- Note: documentation can include a documented conversation between coach and center.

Setting the Stage: How Do We Want to Be In Community?

This is a starting point... Add other ideas to the chat box.

- **Join with computer and turn on your video:** this increases sense of connection and enables you to join in the white board activities.
 - We will be using breakout rooms and virtual white boards. We've found tech issues with iPads and phones are challenging for seeing documents.
- **Set the intention to be fully present.** This is the time for you to dive deep and fully take advantage of the wisdom in this room.
- **Be brief and succinct** when you share to make space for many thoughts/ideas.
- **Be open and honest.** Share what's not working as well as what is working!
- **Engaging patients can be challenging and creates vulnerability** for receiving information let's share what this is like as this evolves.
- **Relax and have fun.** We need it right now!

PHMI Three Levels of Patient Engagement

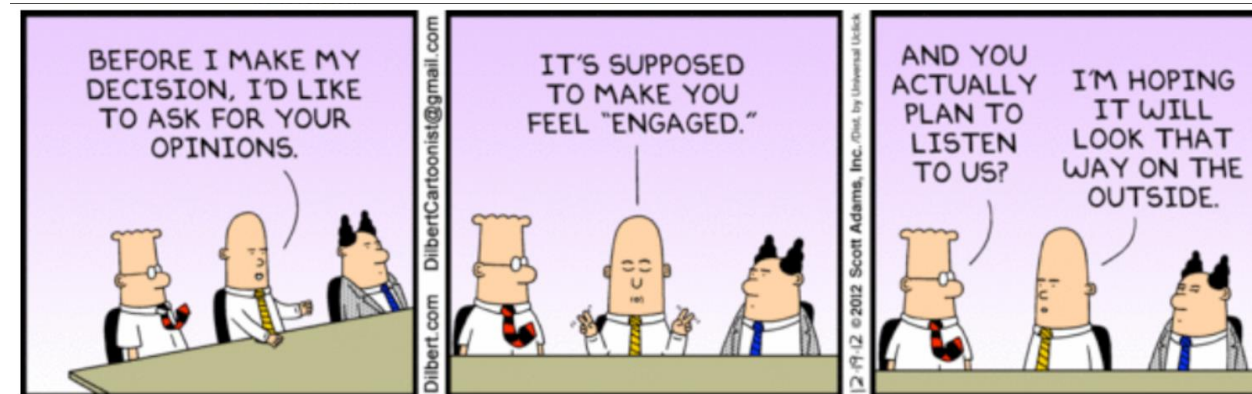
Creating conditions for meaningful engagement with patients in designing population health management strategies

Patient Engagement Principles and Approaches

We've created three approaches for patient engagement to give you options to get started. We've considered the following as we created these three approaches.

Each level strives to..

- Align with CMS and HRSA "patient-centered practice"
- Engage individuals with lived experience to better understand patient preferences, beliefs, assets, barriers and ideas
- Respect the patient's values, needs, and voice
- Support health equity by focusing on the unique aspects of populations
- Consider how we prepare to receive the feedback in a meaningful and intentional way
- Stretches centers to think outside of the 'normal' asynchronous feedback



Three Approaches to Patient Engagement

- Level 1: Verbal and/or Written Feedback at Point of Care
- Level 2: Utilize Patient/Family Councils
- Level 3: Establish PHM Patient/Family Advisors

Baseline: Asynchronous Patient Engagement
(Survey/Patient Interviews)

Level 1: Verbal and/or Written Feedback at Point of Care

- This is an active patient engagement strategy that takes it beyond asynchronous feedback.
- It may involve standardized questions before, during, or immediately after a visit to get direct feedback on a QI/PHM process you have selected.
- Advantages:
 - Gathers input while the patient is on-site and actively involved in receiving and thinking about the care and the delivery system
 - Is easy to do & can be implemented as part of the workflow by anyone on the care team
 - Allows for quick responses to timely questions
- Disadvantages:
 - Best used for simple concepts or short, non-detailed questions
 - Does not typically allow for detailed dialogue or probing questions
 - Patients may not understand the question
 - Patients may not respond honestly if they are concerned their care will be compromised with an honest response or if they fear offending the care team

Full description for Level 1 included in the email sent prior to this session and will be posted to the PHM Portal post session.

Level 2: Utilize CHC's Patient Council

- This is a more active level of patient engagement to provide feedback on selected processes over a defined period.
- You will be selecting a subset of patient council members who represent your Population of Focus and have lived experience.
- Advantages:
 - They are engaged and willing to support centers as a member of the patient council.
 - They are oriented to the CHC and have some level of understanding of how the center operates which can inform improvement feedback.
 - They may be acquainted with QI.
 - They have practiced the art of providing feedback to their CHC.
- Disadvantages:
 - Council members may not represent your Population of Focus and/or someone with lived experience, especially as you consider closing equity gaps.
 - The timing of your need for feedback (now) may not align with a patient advisor's availability or capacity.

Full description for Level 2 included in the email sent prior to this session, and will be posted to the PHM Portal post session.

Level 3: Dedicated PHM Patient Advisor

- This is an aspirational and mature level of ongoing patient engagement.
- A patient advisor will have a formal role as a member of your QI/Implementation Team with meaningful ways to provide ongoing feedback.
- A health center considering this option needs to assess their capacity to take this on.
- Advantages:
 - Enables the PHM team to co-produce with patients who can provide real time feedback.
 - Enables true partnership between centers and advisors
- Disadvantages:
 - Amount of time it takes to identify the right person
 - The ongoing communication and support needed for true engagement
 - Not be able meet the foundational competency by end of April

Full description for Level 3 included in the email sent prior to this session, and will be posted to the PHM Portal post session.

Team Time – 25 minutes

Team Time Agenda

Role of Facilitator: Move through the agenda and prepare one team member to report

Settling In: Introductions (if necessary). Select a reporter for the report out (3 m)

Part I: Determine level of engagement to focus on over the next 3 months and why (5-15m)

- Discuss what level our team is most interested in pursuing (or continuing) over the next 3 months. Reference the foundational competency and validation criteria (below)
- Review that level's overview document for key things to consider

Note that table below provides space for capturing comments from team members

Part II: For the level selected, review that level's planning worksheet and begin to map out the work in the time you have (10-15m).

- Review the planned worksheet for the level selected
- Identify at least two activities to focus on over the next month.

Part III: Prepare for report out (3-5m)

- The host will provide a 3-minute warning; this is a signal to prepare for report out
- Discuss prompt #4 below – what do you want to learn specific to this level/your work from other centers and experts?

Access the team time worksheet in the email sent prior to this call.

If your team needs support during team time, text message Sandra Afful (720-472-0809) and we'll send someone to your room.

Breakout Room #	Center	Facilitator	PT Coach
1	Alliance Medical Center	Paige	Lyn
2	CMC	Lyn	Lyn
3	MCHC	Margaret	Eugenia
4	Open Door	Eugenia	Eugenia
5	Golden Valley	Gena	Eugenia
6	West County Health Center & Redwood Coast	Claire	Claire
7	Asian Pacific Healthcare Venture	Poppy	Claire
8	Valley Community Healthcare	Denise	Denise
9	Santa Rosa	Jackie	Denise
10	Alexander Valley	Elena	Elena
11	Share back Breakout Room	Margaret	Eugenia and Lyn's CHC's
Main Room	Share back	Jen	Claire, Denise and Elena's CHC's

Team Time Share Back

Share Back

Team reporter to provide the following:

- Center name and team members
- Level of engagement you selected and why
- 2 key activities identified for focus in Action Period 1
- What you'd like to learn from peers in this AG

Reflections & Wrap Up

Patient Engagement Affinity Group



Coach: Lyn Yasamura
PoF: Adults - Preventive



Coach: Lyn Yasamura
PoF: Pregnant People



Coach: Eugenia Black
PoF: Adults - Preventive



Coach: Eugenia Black
PoF: Pregnant People



Coach: Eugenia Black
PoF: Children



Coach: Elena Thomas Faulkner
PoF: Adults - Preventive



Coach: Elena Thomas Faulkner
PoF: Behavioral Health



Coach: Claire Richardson
POF: Adults- Chronic Conditions



Coach: Denise Armstorff
PoF: Adults - Chronic Conditions

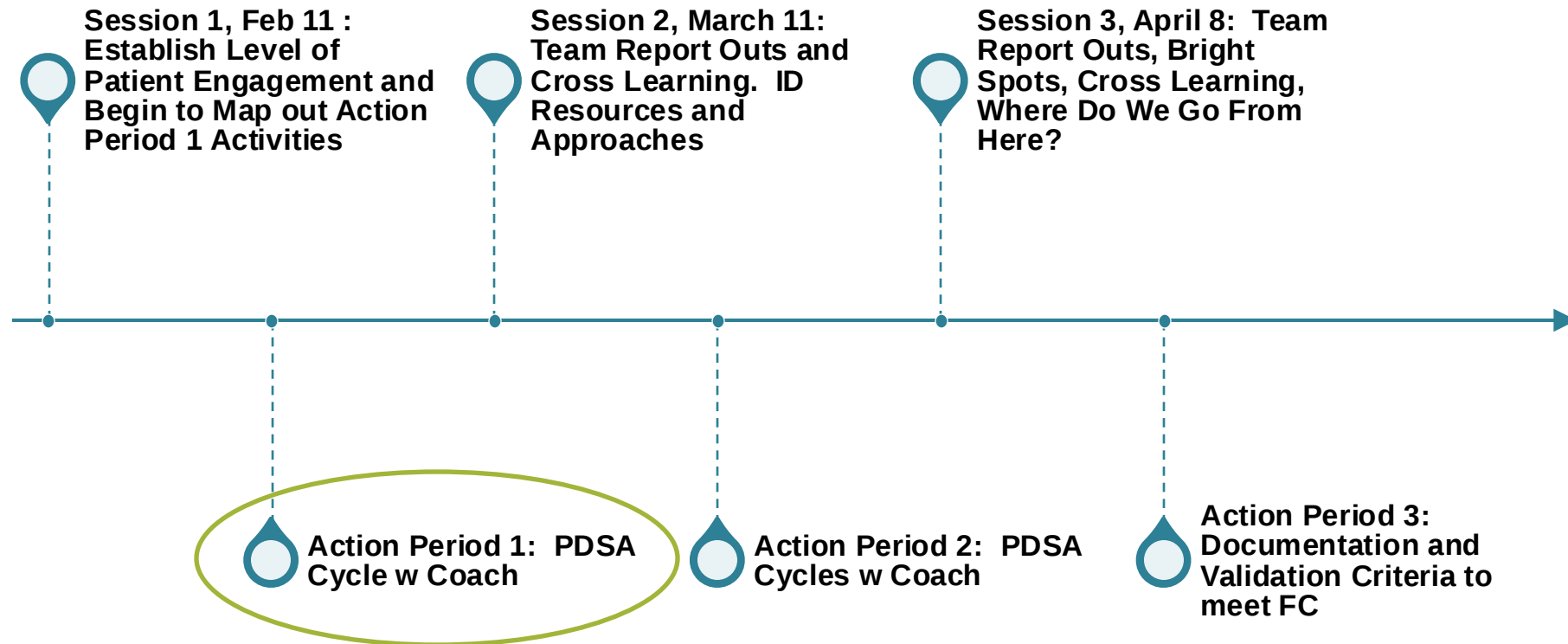


Coach: Denise Armstorff
PoF: Children



Coach: Claire Richardson
PoF: Behavioral Health

Patient Engagement Strategies & Implementation Timeline



Action Period 1: With your coach, work on the key activities. Select the QI process for patient feedback, determine who and how you will get the feedback, bring questions back to the group in March

Wrap Up & Next Steps

- Please complete the **pulse check questions** before you leave the webinar
- We will share the cohort portal link on a dedicated page for this affinity group. This will include slides, materials and recording
- Move into Action Period 1 with your coach
- As you have questions, work with your coach
- We'll see you on March 18th at noon!