



Enhancing Patient Experience Through Patient and Family Engagement

APRIL 12, 2024



The AAFP has reviewed *Enhancing Patient Experience Through Patient and Family Engagement* and deemed it acceptable for up to 1.25 Live AAFP Prescribed credit(s). Term of Approval is from 04/12/2024 to 04/12/2024. Physicians should claim only the credit commensurate with the extent of their participation in the activity.

Disclosures



- ▶ Melanie Cavaliere, Daphne LeBlanc, Kaelynne Switzer, and Keiron Bone Dormegnien, along with the members of the Education Committee and MDAFP staff (the content controllers) for this activity have no relevant financial relationship(s) with ineligible companies to disclose.

Learning Objectives



- ▶ Identify how patient and family engagement can lead to improved quality and safety
- ▶ Understand factors that influence patient and family engagement, including cultural factors
- ▶ Recognize how practices incorporate the feedback from patients and families



AGENDA

- ▶ **Amar Duggirala, MD, MDAFP**, Opening Remarks
- ▶ **Melanie Cavaliere, MHCC**, Overview MHCC Practice Transformation Initiatives
- ▶ **Daphne LeBlanc, MedChi CTO**, Subject Matter Expert
- ▶ **Kaelynn Switzer, PCA of Hagerstown**, Practice Perspective
- ▶ **Keiron Bone Dormegnie, IC Care, Inc.**, Practice Perspective
- ▶ **Q&A**





Amar Duggirala, MD

President-Elect,
MDAFP

Snapshot of Maryland



- ▶ 6.18 million people
(Source: [United States Census Bureau](#))
- ▶ 16.9% of population is age 65 and over (Source: [United States Census Bureau](#))





Advancing Practice Transformation



Background



- ▶ Advancing practice transformation has been an MHCC strategic priority for more than a decade
- ▶ Maryland law tasked MHCC with implementation and management of the Maryland Multi-Payor PCMH Program from 2011 through 2016
- ▶ The MHCC, MedChi, and the University of Maryland School of Medicine Department of Family and Community Medicine partnered with the New Jersey Innovation Institute to complete practice transformation activities in Maryland as part of the federal Transforming Clinical Practice Initiative from 2015 to 2019
- ▶ The MHCC has contributed to planning and policy development for the Maryland Primary Care Program since its inception in 2017

Health Equity Practice Roundtable



- ▶ The MHCC convened a Health Equity Practice Roundtable (Roundtable) in March 2022 with representatives from advanced care delivery practices to identify challenges and opportunities for practices seeking to address key health equity concerns in their communities
- ▶ The goal of the Roundtable was to advance health equity in ambulatory practices in Maryland through the development of practice resources informed by Roundtable feedback
- ▶ Feedback from the Roundtable informed a Health Equity Symposium in March 2023 focused on strategies for identifying patterns of need in the community, building referral networks for services related to social needs, and connecting patients to resources
- ▶ More information about the Roundtable is available at:
mhcc.maryland.gov/mhcc/pages/apc/apc_icd/apc_icd_learning_networks.aspx

Advancing Practice Transformation

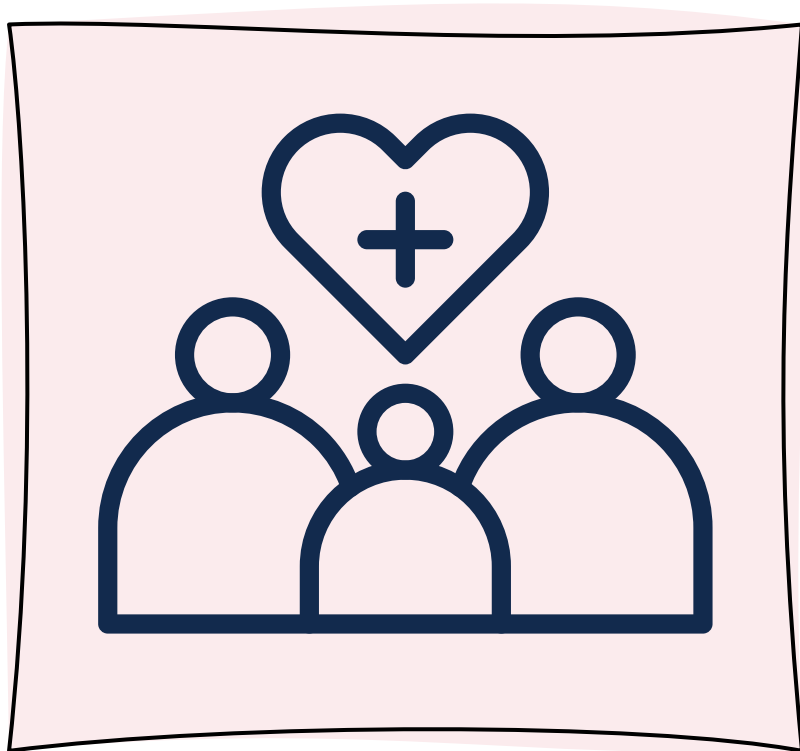
Program Overview



- ▶ In June 2021, MedChi CTO was competitively awarded a grant to complete transformation activities
- ▶ A crucial role of MedChi CTO is providing practice coaching on specific transformation topics and approaches, such as quality improvement and tools to help sequence and manage change essential to succeed in a value-based care model
- ▶ Program milestones:
 - Milestone 1 – Readiness Assessment
 - Milestone 2 – Workflow Redesign
 - Milestone 3 – Training
- ▶ Approximately 45 practices completed the program in June 2023
- ▶ An additional 27 practices are projected to complete Round 2 by June 2024

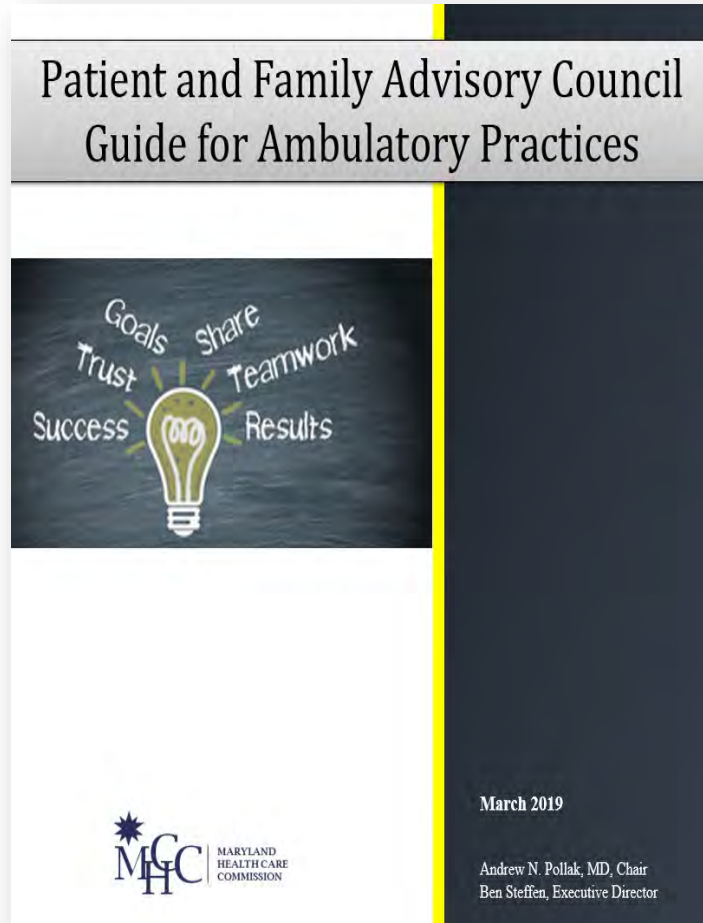


About Patient And Family Engagement



- ▶ Patient and family engagement is a key component for practice transformation and an ongoing mechanism to support meaningful partnerships among patient and family advisors (PFAs), staff, clinicians, and organizational leaders
- ▶ When PFAs' viewpoints are integrated to create a transformed delivery system, the practice is more prepared to respond to patient needs, priorities, and values

Patient and Family Advisory Council (PFAC) Guide Overview



- ▶ Provides Maryland ambulatory practices with information and resources to help practices establish PFACs, engage participants in meaningful activities to improve care, and expand the PFAC's impact

PFAC Guide Elements



Section One: Creating a PFAC (Beginner)

Assessing a Practice's Readiness for Partnership with Patients and Families

WHAT:	A practice should assess its capacity for and commitment to partnership with patients and families. <i>PFA Application, Page 1</i>
WHY:	Ensuring readiness will help practices develop sustainable partnerships with patients and families that lead to longer-lasting benefits, such as better coordinated care.
HOW:	<ul style="list-style-type: none">Start by identifying initial strengths, needs, and challenges (before recruiting PFAs and building expectations among practice).Explore the questions below in meetings with practice leaders, staff, and clinicians such as:<ul style="list-style-type: none">Are key practice leaders, staff, and clinicians supportive of partnership with patients and families?

Patient Perspective

"Being a part of the newly designed Patient Family Advisory Council allows me to really feel like I am making a difference in the way the patient is seen through the eyes of the caregivers..." – Emma Course, Patient Family Advisor

Patient & Family Advisor Application

Would you be a partner with us to deliver patient- and family-centered care every time in every encounter? To reach this goal, we need your ideas, feedback and participation as together we improve the experience of care for our patients and families. We are seeking individuals for a variety of opportunities – both short term and ongoing.

Date: _____

Name: _____
Last First MI

City: _____ State: _____ Zip: _____

Work Phone: _____ Cell Phone: _____

How do you prefer to be contacted? (circle one) Home Work Cell Email

Address: _____
of hospital/clinic or facility

What service(s) do you receive services? _____

Number of patient from _____

I am a patient with a chronic health condition (e.g., diabetes, heart failure, asthma, depression, arthritis)

- ▶ Key elements of the Guide include:
 - What, Why, How
 - Frequently Asked Questions
 - Tips
 - Quotes from Patients and Providers
 - Printable Forms
 - Links to Resources
 - Glossary
 - Acronyms

How To Use The PFAC Guide



▶ The Guide is organized into three sections:

1. Creating a PFAC (Beginner)
2. Strategic PFAC Integration (Intermediate)
3. Expanding the PFAC's Influence and Impact (Advanced)

▶ A practice should:

- Select the section most applicable to their needs and capacity
- Review and implement the strategies outlined in the section(s)
- Utilize additional resources provided in each section to further inform implementation

The PFAC Guide can be found on MHCC's website: mhcc.maryland.gov/mhcc/pages/apc/apc/apc.aspx

PFAC Guide Update

- ▶ Addendum on the use of PFACs during the COVID-19 public health emergency (PHE) based on data from ambulatory practices
- ▶ Data gathering:
 - Virtual focus groups provided qualitative data on the impact of the PHE on PFACs and PFAs
 - Environmental scan to assess how PFAs were engaged during the PHE



Learning Network Events



- ▶ The MHCC convenes peer learning network events in collaboration with local and national health care leaders on topics such as health equity, advanced care delivery, and practice transformation
- ▶ More information on learning network events is available at:
mhcc.maryland.gov/mhcc/Pages/apc/apc_icd/apc_icd_learning_networks.aspx



Advanced Care Delivery Events



- ▶ Prior events available on the [Learning Network](#) include:



Health Equity Symposium

March 2023

Challenges around addressing health equity issues are discussed during this symposium, which was convened in collaboration with the Health Services Cost Review Commission and MedChi, The Maryland State Medical Society. Discussions focus on strategies for identifying patterns of need in the community, building referral networks for services related to social needs, and connecting patients to resources.

[Watch Now](#) [Download Slides](#)



THE EVOLVING ROLE OF SOCIAL WORKERS IN TEAM-BASED ADVANCED CARE DELIVERY

November 2023

A social worker and medical director share how the role of social workers in team-based models is evolving. The presentation includes information about why some advanced care delivery practices employ in-house social workers and demonstrate how advanced care delivery practices share social worker resources.

[Watch Now](#) [Download Slides](#)



Daphne Leblanc

*Practice Transformation
Specialist,*
MedChi CTO



Questions to Consider

- ▶ How do you currently get patient feedback (i.e., comment box, CAHPS Survey, other)?
- ▶ How often do you review, assess, and implement the feedback given?
- ▶ Have you implemented a PFAC in your practice?
- ▶ If so, how has the feedback/recommendations enhanced your patient experience and overall practice?

Patient and Family Engagement



- ▶ Provides an opportunity for patients and families to advise, offer guidance and promote positive change to improve the patient and family experience.
- ▶ A round table conversation to discuss the practice's strengths and weaknesses.
- ▶ Should include practitioners, clinical and non-clinical staff, patients, families/caregivers.
- ▶ An open forum for feedback and recommendations from the patients/caregiver's perspective.
- ▶ This is a non-clinical conversation.

Recruit



- ▶ Ask the care team for suggestions of patients who may be good candidates.
- ▶ Must be comfortable speaking in group settings.
- ▶ Must be willing to share their experiences and provide feedback that would benefit others.
- ▶ No special skills or qualifications required.
- ▶ Participants should represent a diverse group of your patient population and community.
- ▶ Approximately 5-6 participants.
- ▶ Members can rotate or stay the same year to year.

Meeting Place And Time



- ▶ Can be in-person or virtual (via Zoom or similar platforms).
 - If virtual, be sure participants are comfortable using the technology.
- ▶ May offer light refreshments and beverage.
- ▶ Consider providing a small gift for participating (i.e., grocery store or gas gift card).
- ▶ Set times convenient for all attendees (i.e., after work /office hours)

Agenda Topic Sample



- ▶ Front Office/ waiting room
 - How would you describe your experience when checking in?
 - Is the waiting area welcoming/comfortable?
 - What recommendation would you give to make it better?
- ▶ Exam Room
 - How would you rate the cleanliness of the exam rooms?
 - Do you find supplies and resources are available (i.e., hand sanitizer, tissue, informational poster or pamphlets)?

Agenda Topic Sample (continued)



▶ Access

- Are you able to reach the office staff easily by phone?
- How would you describe our messaging?- Too long/short? Clear and precise?
- New patients-> Can you locate our office easily (i.e., address, suite number)?
- Are the current office hours convenient and adequate for your scheduling needs?
- What would you recommend to make it a better experience?

▶ Communication

- Are calls answered in a friendly and timely manner?
- Does the care team speak with words you can easily understand?
- How would you enhance our response time?

Implement



- ▶ Be sure to take notes of the discussion points.
- ▶ Assess all recommendations and feedback given.
- ▶ Assign tasks to staff when you are ready to implement changes.
- ▶ Gradually implement recommendations as you see fit.
 - Start with the simplest changes first (i.e., tissue boxes in the waiting area).
- ▶ Set timelines of those recommendations you wish to implement.



Kaelynnne Switzer

Care Manager,
Primary Care Associates
of Hagerstown



Questions to Consider

- ▶ What challenges has your practice faced with patient and family engagement?
- ▶ What benefits has your practice attributed to patient and family engagement efforts?

Navigating the Terrain: Exploring Challenges in PFAC



- ▶ **Finding Our Way:** The Challenge of Selecting the Right Members for Our PFAC
- ▶ **Clarifying the Mission:** Communicating the Purpose of PFAC to Patients and Families
- ▶ **Breaking Through:** Overcoming Barriers to Engaging Patients and Families in PFAC

Finding Our Way: The Challenge of Selecting the Right Members for Our PFAC



- ▶ **Office-Wide Collaboration:** Every member of the office contributed to this, fostering a sense of teamwork and shared responsibility.
- ▶ **Diverse Representation:** Striving for inclusivity, we wanted a blend of backgrounds and ages among PFAC members to ensure a rich tapestry of perspectives.
- ▶ **Critical Thinking:** Emphasizing diversity of thought, we deliberately avoided selecting individuals prone to mere agreement or those likely to offer only superficial praise

Clarifying the Mission: Communicating the Purpose of PFAC to Patients and Families



- ▶ **Social Media Engagement:** Leveraging Facebook for PFAC awareness.
- ▶ **Office Flyers:** Eye-catching flyers to inform about PFAC.
- ▶ **Direct Patient Engagement:** Engaging patients in conversations during office visits.
- ▶ **Personalized Invitations:** Sending letters inviting participation and explaining PFAC.

Breaking Through: Overcoming Barriers to Engaging Patients and Families in PFAC



Question Adaptation:

- ▶ Initially, our questions centered around our office's performance, yielding minimal engagement and discussion.
- ▶ Refocused on patients' healthcare experiences, fostering robust dialogue and insights.
- ▶ Expanded to inquire about community needs, revealing enlightening perspectives and uncovering hidden office resources.

Turning Insights into Action: The Impact of Patient-Driven Engagement



- ▶ **Diverse Representation:** Our PFAC boasted a diverse membership, ensuring a broad spectrum of perspectives.
- ▶ **Increased Patient Engagement:** There was an increase in patient engagement, with members expressing a desire for more frequent meetings and ongoing communication.
- ▶ **Expanded Program Participation:** There has been greater involvement in initiatives like MDPCP, HEART, Comprehensive Medication Management and Care Management, showcasing our PFAC's proactive contributions to enhancing healthcare delivery.



Keiron Bone Dormegnien

Office Manager
IC Care, Inc.



Questions to Consider

- ▶ What surprised you about you about patient & family engagement efforts?
- ▶ How do you reach out to participants?
- ▶ Does anyone use social media channels effectively?
- ▶ What would you like to do differently in your engagement efforts?

Engaging the Patient Family Advisory Council

Enhancing Patient Experience

IC Care Team (Spring 2024)

The Stories We Tell Are Important

They are the..

- Healing process
- Provider information
- Connection/community



Challenge

Enhancing Patient Experience

- Identify ways to **improve our service** and to learn about **issues important to patients**
- Grow with the **values** important to our organization and community.

Patient Family Advisory Council

The primary objectives of the PFAC are:

- To provide ongoing feedback that aids in **establishing organizational priorities** and in addressing patient service issues.
- To assist in **promoting highly effective practices** in response to patient/family needs and priorities.
- To **improve the patient experience** as measured by patient satisfaction survey scores, personal letters and other data-gathering tools.
- To educate PFAC membership so they can become **ambassadors** to and for I C Care and the community.
- To **strengthen** communication and **collaboration among patients, families, caregivers and staff**.
- To **promote patient and family advocacy and involvement**.

IC Care Strategic Growth

2021 to present

THE IC CARE GROWTH 2021-2022

Try New Approaches ▼

Focus on Positive Health

Learning Communities

Home based Tools

More Telehealth

Less Patient Wait Time

Transparency ▼

Clear Objectives

IC Care Approval

Verify with Patients ▼

Is this working?

Is it inclusive?

Making a difference?

Try Again ▼

Continue PFAC feedback

Try new community based partnerships

What are other values to ensure continued trust in IC Care?

What We Did

Starting in 2019

- **Invited clinic patients and family members** through in-office flyers, email campaign, and sign-up sheets
- Distributed **general surveys** (paper, electronic) for folks who couldn't attend, or were not interested in a meeting
- We **held 2-3 meetings** over the year: 1 virtual and 1 in-person

Feedback

Meetings of 3-7 attendees

- **Service offerings**
 - Saturday hours, Diabetes management learning groups, Walk-out notes
- **Marketing ideas**
 - 1. **testimonials** of good work of office. 2. best **social media** usage/channels. 3. **health booth** at job fairs, schools, churches. 4. **hiring process**: interviews, shadowing. 5. **incentivize staff** to bring on new patients
- **Praise & Challenges**
 - Specific team members and anecdotes of style of care

Benefits

Small forum for patient engagement

- **Recruitment assistance**
 - Interview questions and interviewers for new providers
- **Refine Positive Health focus**
 - Copy for Office manifesto on “Trusted Care”.
- **Word of mouth & Ambassadors Training**
- **Medical Assistants**
 - Group facilitation skills & community organizing

We help sick people get healthy!

Contact: Keiron Bone Dormegnie - (301) 773-9700 x101, keiron@ICCare.US

Q & A





THANK YOU



Melanie Cavaliere

Chief, Innovative Care Delivery

melanie.cavaliere@maryland.gov



mhcc.maryland.gov