• Together 2 Goal® Updates
  – Webinar Reminders
  – 2018 Institute for Quality Leadership (IQL)
  – 2019 Acclaim Award Application

• Shared Medical Appointments for Diabetes Care
  – Marianne Sumego, M.D. of Cleveland Clinic

• Q&A
  – Use Q&A or chat feature
WEBINAR REMINDERS

• Webinar will be recorded today and available the week of July 23rd
  – www.Together2Goal.org

• Participants are encouraged to ask questions using the “Chat” and “Q&A” functions on the right side of your screen
Together 2 Goal® Peer-to-Peer Breakout Session:
Taking Diabetes to Heart: Finding Value in the Medicare Population

Featuring:

Mercy
SHARP Rees-Stealy Medical Group
Utica Park Clinic

Registration now open at amga.org/IQL18
Applications Due September 21

Honors the nation's premier healthcare delivery organizations that are high performing:

- Measurably improving the quality and value of care
- Improving patient experience and outcomes
- Continuously learning and innovating
- Improving population health

Contact Sunny Temesgen, at stemesgen@amga.org for more information
Marianne Sumego, M.D.

Medical Director, Shared Medical Appointment Program,
Cleveland Clinic
Our mission......

“The good physician treats the disease, the great physician treats the patient who has the disease.”
Sir William Osler
Who I am...

Medical Director of Shared medical appointment program
Office of patient experience

SMA’s for Chronic disease, Woman’s Wellness

Passion: Healthy cooking
Agenda

• Overview
• Cheryl’s story
• Quick take aways
• Next steps
Shared Medical Appointment (SMA)

- Similar condition or wellness care
- Multiple patients seen simultaneously
- Learning is enhanced through repetition, common education
SMA Benefits

Provider

• Improved access
• Leverage resources
• Maximize scope of practice
• Workflow efficiency
• Remove redundancy
• Satisfaction
• Quality Visits

Patient

• Prompt Access to Care
• Inc. physician time
• Access to additional learning resources
• Learning enhanced through repetition
• Satisfaction
• Quality of care
Essential SMA Elements

• 90 minute appointment
• 8-12 patients with Diabetes
• Individual Appointments conducted in sequence
• Address labs, refills, care plan
• Privacy is addressed
• E&M visit
The How:

It takes a team !!!!!!
SMA team

- **Clerical**: Schedule, offer to patients, identify
- **Clinical Intake**: Medical assistant
- **Primary Medical Provider**: MD, DO, NP, PA
- **Facilitator**: NP, RN, Nutritionist, Social Worker, CDE, RD, Pharm
- **Administration**: Coordination and Support
Workflow

• **Clerical** – patients check in with co-pays 15 – 20 minutes early
  8-12 patients (support)

• **Clinical Intake** – patients are roomed/intake, vitals and intake, gather results
  (support), name tags, flip chart prep

• **Facilitator** – **Room prep**, Begins documenting concerns (HPI), facilitates teaching and discussion, supports provider with expertise, wraps up

• **Primary Medical Provider** - Conducts visit addressing each patient in sequence, documents exam, plan of care determined, close and billing
SMA Set-up

Facilitator

Provider

Patients
To facilitate.....

To make something easier
To help something run smoother, more effective
Facilitator role

Pre-visit
• Frontload, abstract, review
• Address needed labs
• Room prep, name tags
• Educational materials

Appointment
• Meet and greet, expectations
• Review privacy
• HPI gathering
• Consider documentation
• Add value, education
• Discharge instructions
• Satisfaction survey
Privacy Concerns???
Discuss the form in front of entire group
If family members are present they are required to sign the form also
Collect forms and record/scan
Needs to be signed at EVERY visit
How do we organize chaos ???

- Patient expectations
- What information is needed prior to the visit?
- White board data
- Efficient documentation
Pre-visit call:

- Patient expectations
- Information gathering
Patient awareness
Information:
Sample White Board
Patient data

<table>
<thead>
<tr>
<th>Name</th>
<th>Na (mEq/L)</th>
<th>Glucose (mg/dL)</th>
<th>LDL (mg/dL)</th>
<th>Triglycerides</th>
<th>HDL (mg/dL)</th>
<th>Total Cholesterol</th>
<th>Blood Pressure</th>
<th>Notes</th>
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<tbody>
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<td>79</td>
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<td>44</td>
<td>106</td>
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</tbody>
</table>
Sample white board.... Adding to documentation

- Last visit
- Medication change
- Disease status

<table>
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<th>Name</th>
<th>HGBA1C</th>
<th>Glucose (60-100)</th>
<th>LDL</th>
<th>Triglycerides (50-150)</th>
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<td>Nancy</td>
<td>6.4</td>
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<td>34</td>
</tr>
</tbody>
</table>

Note: Arrows indicate changes or updates.
Cheryl’s story

• Age 57 y/o
• Duration of DM: 2006, last A1c under 7.0 in 2012
• PMH: HTN, Hyperlipidemia, DM, Optic atrophy with visual impairment
  Depression off and on since 2008
• Saw endocrinology and PCP for DM management off an on since 2011
• Recruited by her PCP to the DM SMA
Her SMA story

Entrance (11/17)
- Renal function normal
- A1c 9.3
- TC 260
- LDL 150
- weight: 262 #

Today (6/18)
- A1c 8.0 (2016)
- A1c 7.0 ⭐
- TC 181
- LDL 104
- Weight 250 #

Actively working with nutrition and psychology
Personal accomplishments
Internal SMA
Patient Satisfaction Survey
(1-5 Scale)

Patient Satisfaction
Press Ganey

Ability to schedule SMA

Satisfaction with primary provider

Did you feel additional benefit from the SMA Visit?

Would you recommend an SMA to other patients?

Will you participate in another SMA?
Thank you, I am aware of what my numbers mean and excited to have some ideas

My daughter gained insight into my diabetes !!!

“...hear from others who share the same concerns that you may have.

Exposed to options that have proven successful and useful for others”

“Things come up in discussion that I would not have thought to ask”

“Best of both worlds. Still have time with doctor, but learn lots of info”

Feel empowered and not alone.

One-on-ones are great - but being in a room with other patients with the same issues is not only comforting but educational.”
Outcomes

- Days wait by 20-50%
- BMI, A1c
- Inc use of recommended medications
- Patient satisfaction (appt. when wanted and visit)
- High provider satisfaction
- Increasing visit volume
Diabetes value

Educational areas:
- nutrition
- exercise
- medication use
- symptoms
- comprehensive care recommendations
What didn’t work

- Excluding clerical staff
- Not having core staffing
- Facilitator integration and guidance
- Doing as needed
- Single disease, single provider SMA
- Seeing as a class or curriculum
- Doing too much !!!!
Take-aways

- Consistent support
- Optimization of workflows (huddle)
- Data and feedback: hurdles and success
- Multiple areas impacted
- Benefits: quality and access
- Patients like it:
Next Steps...

- Build an SMA team
- Clear schedules and develop the appointment
- Add value......
- Create your recruitment plan
- Design forms and surveys for the SMA
- Promote meetings, staff meetings
- Commit to 6 months !!!!
Chihuly in the Garden

Traditional and New can Intersect

Questions?

Marianne Sumego: sumegom@ccf.org
Anne Maggiore: maggioa2@ccf.org
• **Date/Time:** Thursday, August 16, 2-3pm Eastern
• **Topic:** Diabetes and Obesity
• **Presenter:** Tim Garvey, M.D. of University of Alabama Birmingham
QUESTIONS?