



NCC Pediatrics Continuity Clinic Curriculum:

PCMH 5: Continuity and Patient Hand-off *Faculty Version*

Goals & Objectives:

Upon completion of this module, the learner should be able to:

- a. List the benefits of assigning each patient a primary care manager (PCM).
- b. Describe the medical home's responsibility to support patients selecting or changing their PCM.
- c. Perform patient panel maintenance, including adding patients to your panel and signing over your patients to their new provider.
- d. Use the IPASS communication method to transition patients between PCMs.

Pre-Meeting Preparation:

Please do the following:

- Read the pre-meeting preparation document.
- Ensure you are able to access your patient panel directly through Carepoint. You may also find your panel in the Share Drive [Pediatrics-->SERVICES--> PRIMARY CARE-->07 RESIDENTS IN CLINIC--> Continuity Clinic --> Panels 2023-2024
- Skim medical home SOP entitled Continuity in Share Drive [PRIMARY CARE --> Medical Home SOPs --> Signed SOPs --> Continuity_05-2017]

Conference Agenda:

- Log onto [Carepoint](#) to review your patient panel; sort by IBI and RUB. You should have received your patient panel via email prior to meeting. ***<https://carepoint.health.mil>, access CAC-enabled***
- Departing residents should ensure appropriate handover of their identified patients.

Extra Credit:

- Filter your patient panel to find the patients with low IBI (illness burden index, ie low-risk based on demographics and existing diagnoses) but high RUB (resource utilization band, high resource users.) What type of patient might have a low IBI and high RUB? What considerations are important in the care of this type of patient?
- Log onto Tricare Online and try to [change your own PCM](#) and make an appointment with your PCM.
- More on ACG IBI and RUB available [here](#) starting at slide 17.

WRNMMC Pediatric and Adolescent PCMH

Continuity and Patient Hand-off

Providing and coordinating medical care is one of the cornerstones of the Patient Centered Medical Home (PCMH). Each patient is assigned a designated primary care manager (PCM), and each PCM cares for a designated panel of patients. All patient appointments - including well, acute, follow-up and preventive care – are ideally completed with the patient’s PCM or another provider on the PCM’s team. Improved PCM continuity is associated with higher quality of care and improved patient and provider satisfaction. The goal for continuity is 70% for PCM continuity and 90% for team continuity.

Patients have the right to choose a PCM, and the PCMH has the responsibility of supporting their decision by providing information about each PCM.

Patients can change their PCM choice at any time. The easiest way for them to change PCMs is to log onto TricareOnline.com, which will bring them to the Tricare beneficiary web enrollment site. (If you have never signed onto Tricare Online, do so before you come to the continuity discussion!) They can also speak with any clinic staff member (in person or by phone), who will fill out the PCM change form; this form is also in every exam room drawer for providers and nurses to use during face-to-face visits. The sponsor’s signature is not required! The person filling out the form must give the form or send an email to lisa.m.smith132.civ@health.mil or dha.bethesda.j-11.mbx.bds-enrollment@health.mil. Tricare will mail the family confirmation of the change in PCM.

The size of each provider’s panel is based on their “full time equivalent” (FTE), or how many available appointments the PCM has in clinic. By Military Health System standards, we enroll 1100 patients per full-time provider (“1100 per FTE”). Interns have capacity for 50 patients; PGY2/3s have 99 patients. Resident may over-enroll their panels to add patients over the course of the academic year. Staff providers, depending on their clinic availability, have from 200 to 700 patients. Each of the medical home teams has approximately 2500 patients.

Assuming a patient is assigned to your panel, how does the patient actually get an appointment with you? Does the appointment booking process support the relationship between a patient and his/her PCM (i.e. support continuity)? When booking an appointment, the patient may use the MHS Genesis patient portal (check to make sure your name is on the portal), send a message to our clinic on the portal, or call the IRMAC. They may book future appointments with their assigned PCM or a provider on the same team; they may not book future appointments with a provider on another team. For acute visits, all booking methods attempt to book patients on

their medical home team, but if this is not possible (due to reduced appointment availability on the team or patient preference), patients can be booked on other teams. Using these booking protocols, our PCM continuity is ~30%, and our team continuity is nearly 100%.

It is helpful to occasionally scrub your panel of patients to ensure: (1) that you are familiar with the complex patients assigned to you, and (2) that the patients you *think* are assigned to you are, in fact, assigned to you. You should reassign unfamiliar complex patients on your panel to a PCM who is more familiar with their medical problems; similarly, you may need to reassign patients that you *are* familiar with who are on other provider panels to your patient panel.

Use the attached instructions to view your patient panel in Carepoint, and filter the panel by “ACG IBI” (Adjusted Clinical Groups Illness Burden Index). The IBI is the most widely-used and -tested system for stratifying patients by illness severity using demographic, utilization, and pharmacy data. Ill patients have a higher IBI. Filter your panel of patients by IBI by clicking on the column header “ACG IBI” then clicking on the triangle. Your high IBI patients will appear at the top of the spreadsheet.

When combined with resource use relative to the US population, the ACG IBI can be used to calculate the ACG RUB (Resource Utilization Band). RUB is calculated on a 7-point system as follows:

- No data (patient has not been enrolled for an entire year)
- 0 = non user
- 1 = healthy
- 2 = low
- 3 = moderate
- 4 = high
- 5 = very high

Filter your patient panel by RUB by clicking on the column header, then clicking on the triangle. Patients with high utilization of medical resources appear at the top of the spreadsheet.

As you review your patients, remember that we have new resources available in the clinic that we may not have had when you last scrubbed your panel. For example, do you have patients that might benefit short term behavioral interventions from Dr. Cowan or Dr. Small? Do you have patients with poorly controlled asthma and high RUB that might benefit from nurse education? Consider talking with the patient’s new PCM about these resources and/or discussing it with the parent directly and placing a consult into MHS Genesis.

For rising PGY2/3s and staff remaining at WR for the next year: During this continuity clinic or over the next few weeks, identify high-IBI and “very high”/“high” RUB patients that you do not follow. Use the Excel spreadsheet in the Shares to indicate patient demographics and to which PCM the patient should be moved, or use the attached spreadsheet.

(This may require checking MHSB to see which provider the complex patient usually sees.)
Provide this list to Dr. Carr by the end of April.

For departing providers (staff, interns, and residents): All of your patients must be reassigned to another clinic provider. For your high-IBI and “very high”/“high” RUB patients, you will complete a verbal and written turnover **before** you leave the hospital using the IPASS sheet in this module. You may also choose to hand off healthy patients that you know well. Review your downloaded panel and use the spreadsheet to indicate patient demographics and to which PCM the patient should be moved, or use the attached spreadsheet and fill out by hand. Provide this list to Cassie Carr by the week of 29 April 2024. (Note: there is no patient approval needed – the patients will all be reassigned no matter what!)

For Residents Leaving the Program

Please review your patient lists in the Shares Folder. If there are complex patients you follow who are not on your patient list, please add them. Please identify a new resident PCM for your complex patients, perform an I-PASS handover for that patient with the new PCM, and email the new assignments to cassie.carr@nccpeds.com. Patients not specified will be transferred en bloc to an incoming PGY-1.



Walter Reed Pediatric Residency Continuity Clinic Schedule AY 23-24

PGY Year	Monday	Tuesday	Wednesday	Thursday	Friday
PGY-1	Anna Casey Genesis James	Karina Kauffman Brown Rebecca Morgis	Brandon Neal McKenzie Bowling	Anna Raymond Daniel Rochford	Madeleine Mascitti Kayla Sallander
PGY-2	Amy Davis Lisa Sukenaga	Samantha Hanciles Brian Fissel	Connor Liggett	Nicole Martin Andrew Warren	Kevin Westbrook
PGY-3	Marianna Caballero Bailey Howard	Emily Ferraro Anthony Lucido	Alexis Gherzi Rob Crutcher	Maggie Hasler Noelle Molter	Taylor Meyers Suhani Patel



Walter Reed Pediatric Residency Continuity Clinic Schedule AY24-25

PGY Year	Monday	Tuesday	Wednesday	Thursday	Friday
PGY-1	Marian-Joy (MJ) Spirnak Victoria Smith Melanie Yonko	Keegan Paulson Simal Ali Leanne Perez	Brenda Zhang Deborah Kolade Andrew Koury	Erin Scroggins Grace Manno	Keenan Caswell Jacquelin Doman
PGY-2	Anna Casey Genesis James	Rebecca Morgis Karina Kauffman Brown	Brandon Neal McKenzie Bowling	Anna Raymond Daniel Rochford	Madeleine Mascitti Kayla Sallander
PGY-3	Amy Davis Lisa Sukenaga	Samantha Hanciles	Connor Liggett	Nicole Martin Andrew Warren	Kevin Westbrook Brian Fissel

Marianna Caballero (124)
Bailey Howard (124)

Emily Ferraro (125)
Anthony Lucido (126)

Alexis Ghersi (73)
Rob Crutcher (124)

Maggie Hasler (125)
Noelle Molter (126)

Taylor Meyers (126)
Suhani Patel (175)

HOW TO PULL PROVIDER PATIENT PANELS IN CAREPOINT (5 easy steps)

- 1) LOG INTO CAREPOINT. GO TO “APPS” AT THE TOP, THEN “ALL APPS”, THEN OPEN MHSPSP. CONSIDER ADDING MHSPSP AS A FAVORITE FOR EASY ACCESS NEXT TIME.
- 2) CLICK ON “PHPM REGISTRIES”, THEN “ALL ENROLLEES”.

The screenshot shows the 'All Enrollees' page for Facility: 0067 - WALTER REED NATL MIL MED CNTR. The enrollment data is current as of 05/03/2017. The table lists 25 items per page, showing 1 - 25 of 6902 items. The 'All Enrollees' link in the left-hand navigation menu is highlighted with a box labeled '2'.

Name	EDIPN	PCM Name	DOB	Age	Provider Group	Next PC Appt Date	Home Phone	Discuss	Pending Entries	User Derived Tags	Notes
CARR CASSANDRA L		CARR CASSANDRA L			PED MED HOME GREEN BE		(616) 514-8409				
CARR CASSANDRA L		CARR CASSANDRA L			PED MED HOME GREEN BE	09/15/2017 13:20	(616) 514-8409				
ENGELHARDT KRISTYN AUGUST		CARR CASSANDRA L			PED MED HOME BLUE BE		(301) 947-8077				
CARR CASSANDRA L		CARR CASSANDRA L			PED MED HOME GREEN BE		(202) 246-0037				
CARR CASSANDRA L		CARR CASSANDRA L			PED MED HOME GREEN BE		(202) 246-0037				
CARR CASSANDRA L		CARR CASSANDRA L			PED MED HOME GREEN BE		(202) 246-0037				
HAWLEY SUSAN LYNN		CARR CASSANDRA L			PED MED HOME BLUE BE		(301) 789-8297				
MALCHODI LAURA M		CARR CASSANDRA L			PED MED HOME RED BE		(301) 648-8173				
BEHM NICOLE JEAN		CARR CASSANDRA L			PED MED HOME GREEN BE		(301) 570-1065				
BEHM NICOLE JEAN		CARR CASSANDRA L			PED MED HOME GREEN BE		(301) 570-1065				
BEHM NICOLE JEAN		CARR CASSANDRA L			PED MED HOME GREEN BE		(301) 570-1065				
BENCZE JENNIFER A		CARR CASSANDRA L			PED MED HOME BLUE BE		(301) 540-4250				
FALCON JENNIFER		CARR CASSANDRA L			PED MED HOME BLUE BE		(785) 210-7691				
FALCON JENNIFER		CARR CASSANDRA L			PED MED HOME BLUE BE		(240) 413-3329				
WELLS AMY MARIE		CARR CASSANDRA L			PED MED HOME BLUE BE		(808) 673-6905				
WELLS AMY MARIE		CARR CASSANDRA L			PED MED HOME BLUE BE	05/04/2017 09:45	(808) 673-6905				
JAMES CYLYNE A		CARR CASSANDRA L			PED MED HOME GREEN BE		(719) 671-3013				
JAMES CYLYNE A		CARR CASSANDRA L			PED MED HOME GREEN BE		(719) 671-3013				
THOMPSON JENNIFER LYNN		CARR CASSANDRA L			PED MED HOME RED BE						
EIGNER DAVID JOSEPH		CARR CASSANDRA L			PED MED HOME GREEN BE	05/17/2017 13:00	(313) 587-3568				

3.) CLICK ON THE DOWN ARROW BY PCM NAME. (You may have to press the right Keyboard arrow or click and drag right to view the column for provider group.)

4) HOVER CURSOR OVER THE WORD “FILTER”

5) IN THE “CONTAINS” BOX, WRITE “LAST NAME FIRST NAME” (LIKE “RICHARDS AUTUMN”). CLICK ON FILTER.

The screenshot shows the 'All Enrollees' page with a filter applied to the PCM Name column. The filter is set to 'Contains' and the value is 'Bencze'. The filtered results show patients with the last name Bencze. A box labeled '3' points to the down arrow next to the PCM Name column header. A box labeled '4' points to the 'Filter' button in the dropdown menu. A box labeled '5' points to the 'Contains' filter type. A box labeled '6' points to the filtered results.

Name	EDIPN	PCM Name	DOB	Age	Provider Group	Next PC Appt Date	Home Phone	Discuss	Pending Entries	User Derived Tags	Notes
BENCZE JENNIFER A		BENCZE JENNIFER A	04/20/2002	15	PED MED HOME BLUE BE		(301) 515-6279				
BENCZE JENNIFER A		BENCZE JENNIFER A	05/18/2002	14	PED MED HOME BLUE BE		(301) 540-4250				
BENCZE JENNIFER A		BENCZE JENNIFER A	04/20/2002	15	PED MED HOME BLUE BE		(301) 963-0074				
BENCZE JENNIFER A		BENCZE JENNIFER A	05/18/2002	14	PED MED HOME BLUE BE		(301) 218-8959				
BENCZE JENNIFER A		BENCZE JENNIFER A	12/25/2002	14	PED MED HOME BLUE BE		(301) 218-8959				
BENCZE JENNIFER A		BENCZE JENNIFER A	05/24/2002	14	PED MED HOME BLUE BE		(301) 888-2276				
BENCZE JENNIFER A		BENCZE JENNIFER A	12/06/2003	13	PED MED HOME BLUE BE		(443) 957-4808				
BENCZE JENNIFER A		BENCZE JENNIFER A	02/15/2004	13	PED MED HOME BLUE BE		(301) 599-0645				
BENCZE JENNIFER A		BENCZE JENNIFER A	11/08/1998	18	PED MED HOME BLUE BE		(301) 717-9106				
BENCZE JENNIFER A		BENCZE JENNIFER A	08/15/2006	10	PED MED HOME BLUE BE		(301) 725-0908				
BENCZE JENNIFER A		BENCZE JENNIFER A	07/13/2006	10	PED MED HOME BLUE BE		(702) 343-5607				
BENCZE JENNIFER A		BENCZE JENNIFER A	03/13/2006	11	PED MED HOME BLUE BE		(540) 428-8581				
BENCZE JENNIFER A		BENCZE JENNIFER A	10/11/2006	10	PED MED HOME BLUE BE		(360) 917-5935				
BENCZE JENNIFER A		BENCZE JENNIFER A	03/16/2007	10	PED MED HOME BLUE BE		(443) 957-4808				
BENCZE JENNIFER A		BENCZE JENNIFER A	04/29/2007	10	PED MED HOME BLUE BE		(301) 963-0074				
BENCZE JENNIFER A		BENCZE JENNIFER A	09/24/2007	9	PED MED HOME BLUE BE		(301) 963-0074				
BENCZE JENNIFER A		BENCZE JENNIFER A	12/16/2007	9	PED MED HOME BLUE BE		(619) 426-8609				
BENCZE JENNIFER A		BENCZE JENNIFER A	01/14/2008	9	PED MED HOME BLUE BE	05/26/2017 09:20	(301) 366-9892				

I-PASS Handoff

- Departing residents and staff will prepare handoffs for *ALL* of their chronic/high utilization patients, and complete verbal and written handoff before leaving the hospital for a new duty station.

I	<u>Patient ID & Illness Severity</u> (stable vs. “watcher”)
P	<u>Patient Summary</u> (organize by problems or systems, with plan for each item)
A	<u>Action List</u> (“To-Do” list with timeline—consults, follow-up appts/studies/education needed)
S	<u>Situation Awareness & Contingency Planning</u> (plan for what might happen; social issues)
S	<u>Synthesis by Receiver</u> (“read-back” and questions)

If a provider has a patient that they would like to add to their panel I am happy to assist.

There are just a few caveats.

1. If the patient is not currently enrolled in DEERS or if the patient is empaneled to a provider outside of the NCR (Maryland, DC, VA), then the patient would need to contact Humana at 1 800 444 5445 for assistance.
2. If the patient is currently empaneled to another provider here at WR, then I can move them to the requested provider provided that they have eligibility.
3. If the patient is currently empaneled to another MTF say Ft Belvoir, and they now want to be seen here at WR. I can process that request also.

Also I updated the PCM Change form with some information. Please take a look and let me know your thoughts.

I hope this helps.

Thank you.

V/r,

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