

# AWV Learning Collaborative

## Overview of the Journey

### February 27<sup>th</sup>, 2018

Timothy Hesselton, BA

Deborah Johnson, MHA

Daniel S. Moran, APRN

Ellen Flaherty, PhD, APRN, AGSF



**Dartmouth**

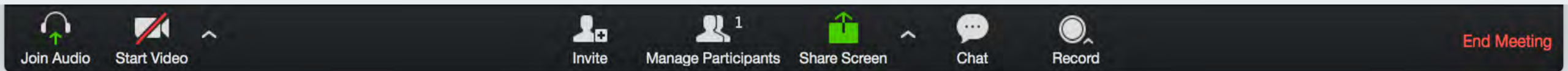
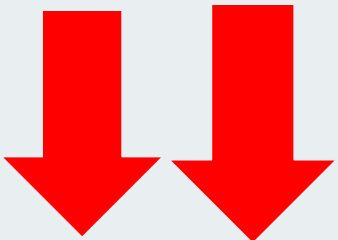
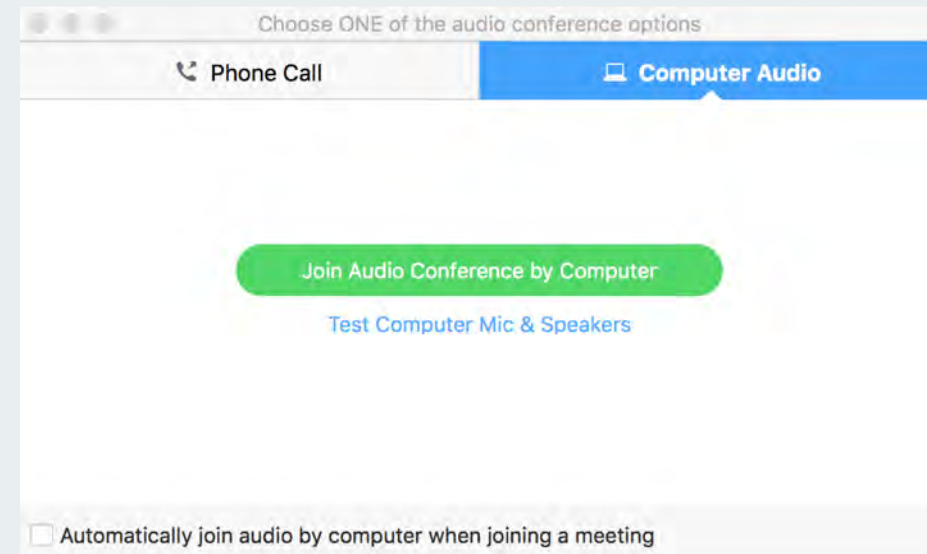
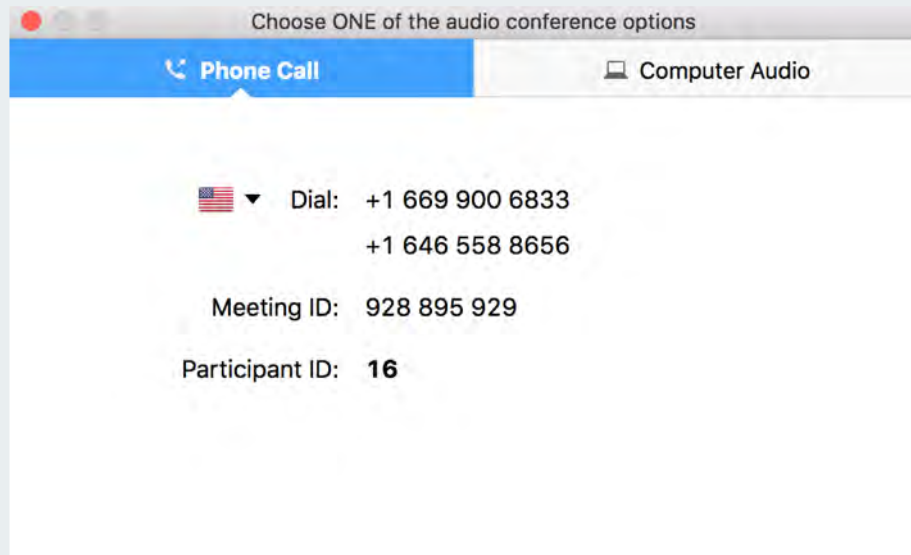
**CENTERS FOR HEALTH AND AGING**



# Activate Audio and Video

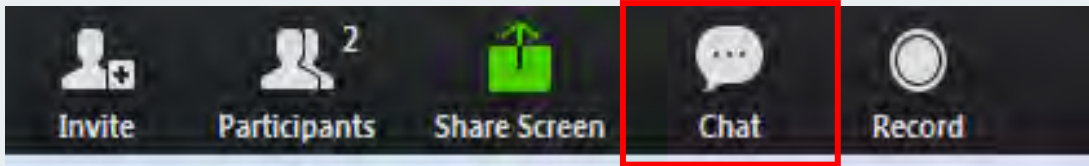
Step 1: Connect to Audio through prompt at sign on or by clicking Join Audio and following instructions

Step 2: Connect to Video if capable by clicking Start Video



# Additional Zoom functionality

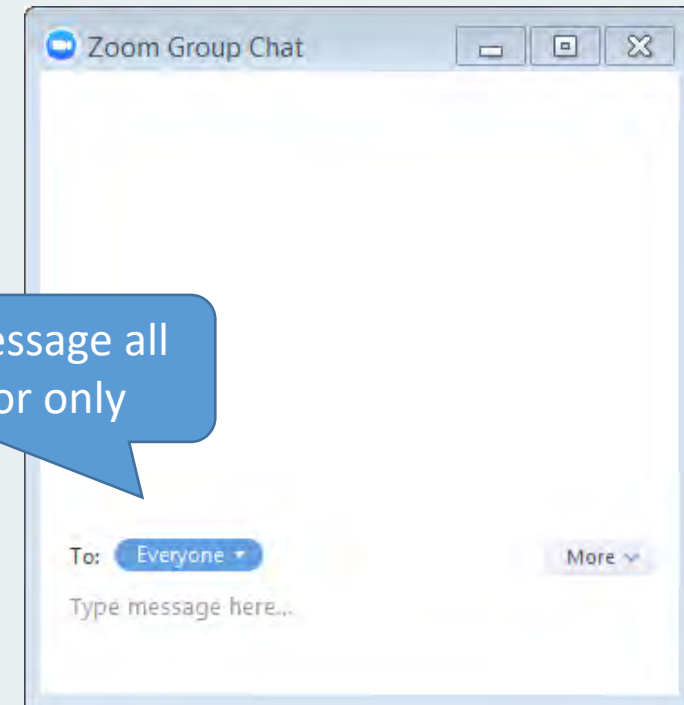
- Use chat to send the names of everyone participating, or if you have any questions or comments during presentations
- All sessions will be recorded and archived



Incoming Message



Option to Message all  
or Facilitator only



# Agenda

Topic	Time	Minutes
Meeting sign-on (Zoom)	2:45 – 3:00	15
Welcome & Roll Call	3:00 – 3:05	5
Introduction to Learning Collaborative: Expectations & Ground Rules	3:05 – 3:15	10
Data Dashboard: Review & Expectations	3:15 – 3:25	10
GWEP's Website	3:25 – 3:30	5
Skills Burst: PDSA	3:30 – 3:40	10
Discussion	3:40 – 3:55	15
Polling Questions & Wrap-up	3:55 – 4:00	5
Adjournment	4:00	

# Welcome & Roll Call

- Institute for Sustainable Health and Optimal Aging
- University of Louisville Physicians - Family Medicine at Newburg
- Please send us the email of any members who should be present who were not invited

# Introduction to Learning Collaborative, Expectations & Ground Rules

# AWV Learning Collaborative Syllabus

Date	Topic	Content & Activities	Data Due
2/27/2018	Overview of the Journey	Introduction to Learning Collaborative Expectations & Ground Rule Data Dashboard Review & Expectations GWEP's Website Skills Burst: PDSA Discussion	3/9/2018
3/27/2018	Pre-Visit Site Readiness	Measurements Update Practice Progress Report Pre-Visit Site Readiness Checklist Skills Burst: Flow Mapping & Swim Lane Flow Charts Discussion	4/13/2018
4/24/2018	Pre-Visit Patient Readiness	Measurement Update Practice Progress Report Pre-Visit Patient Readiness Checklist Skills Burst: Based on Need Discussion	5/11/2018
5/22/2018	During the Visit	Measurement Update Practice Progress Report During the Visit Checklist Skills Burst: Using Your EMR's Tools Discussion	6/8/2018
6/26/2018	Post Visit	Measurement Update Practice Progress Report Post Visit Check List Skills Burst: Poster Development Discussion	7/13/2018
7/24/2018	Sustaining	Measurement Update Practice Progress Report Final Debrief and Adjournment of Learning Collaborative	8/10/2018

# Learning Collaborative Timeline

Jan 30  
AWV Bootcamp



2018

2019

Jan Feb Mar Apr May Jun Jul Aug Sep Oct Nov Dec Jan Feb

Learning  
Collaborative

#1

#2

#3

#4

#5

#6

Sustainability

Feb 27  
Overview

Mar ??  
Site  
Readiness

Apr ??  
Patient  
Readiness

May ??  
During  
Visit

Mar ??  
Post  
Visit

Apr ??  
Sustaining  
Progress

# Learning Collaborative Expectations

- In person Orientation✓
- 6 one-hour long monthly web based learning sessions
- Monthly Data Collection via Data Dashboards

# Learning Collaborative Expectations

- Learning Collaborative Team
  - **Anyone** assisting in implementing AWW's including:
    - Nurse(s) - RN and LPN
    - Practice Manager
    - Physician / Non-Physician Practitioner
    - Medical Assistant
    - Secretary
    - Coder / Billing
- Teams should **meet at least once** between learning sessions
  - Include leadership in these meetings if possible
- As many members of the team that can attend calls should
  - Must be prepared to provide a brief update on the status of your team's progress, including pearls of wisdom or barriers

# Learning Collaborative Ground Rules

- Log in on time
- Participate
- Use chat function
- One speaker at a time
- Mute when not speaking
- Courtesy and Respect
  - We're all learning together
- Submit data and progress reports ON TIME
- Complete Post-webinar evaluation
  - We need to know how we can improve

# Post-Webinar Evaluation

**Who:** Individual team members

**What:** Short Survey (1-2 minute max)

**When:** End of each Webinar (day of)

**Why:**

- What went well?
- What could be improved?
- Overall quality of session?
- 'Zoom' IT experience?
- Other (Optional)?

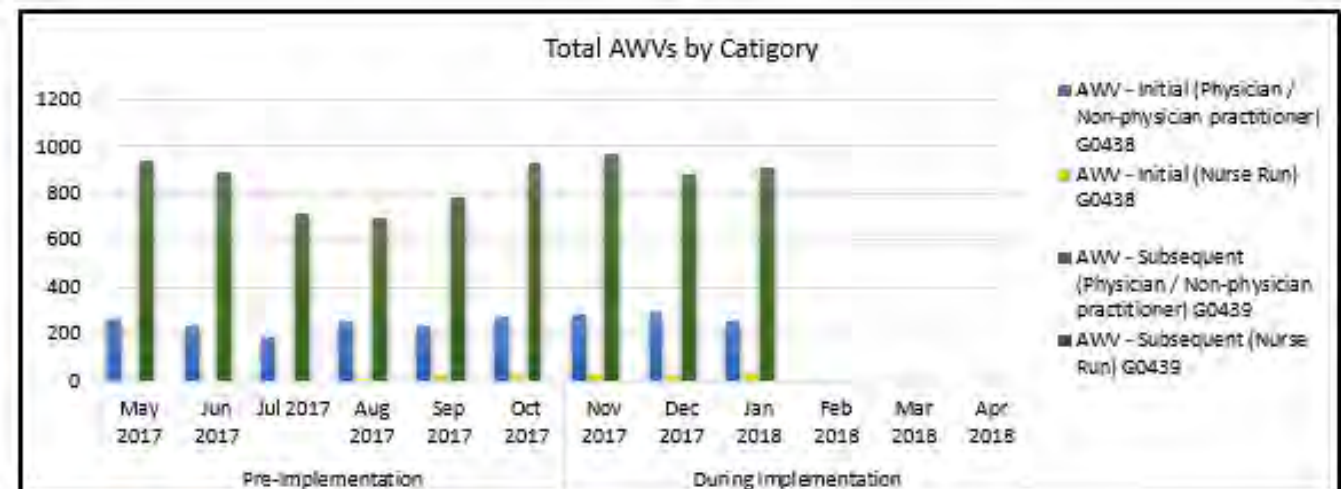
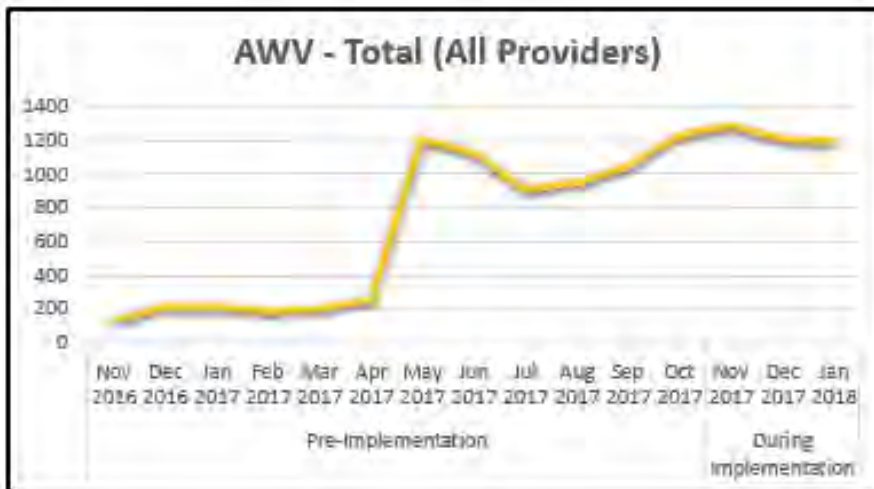
# Introduction to Data Dashboard & Expectations

# Data Dashboard

- Excel workbook - one per site
- Includes
  - Outcome measures – number of visits
  - Process measures – steps in the process
  - Monthly progress report
- The workbook automatically creates descriptive and analytic displays which we can use for improvement, posters, and publications
- We will aggregate to the collaborative level here and will review together in collaborative sessions

# Data Dashboard Outcome Measures

Total ICD Codes per Month		Pre-Implementation												During Implementation						Post Intervention					
Visit Type	ICD	Nov 2016	Dec 2016	Jan 2017	Feb 2017	Mar 2017	Apr 2017	May 2017	Jun 2017	Jul 2017	Aug 2017	Sep 2017	Oct 2017	Nov 2017	Dec 2017	Jan 2018	Feb 2018	Mar 2018	Apr 2018	May 2018	Jun 2018	Jul 2018	Aug 2018	Sep 2018	Oct 2018
IPPE	G0402	9	4	14	8	9	6	49	51	36	34	38	55	57	41	41	0	0	0	0	0	0	0	0	0
AWV - Initial (Physician / Non-physician practitioner)	G0438	35	40	41	43	41	39	271	241	190	256	238	276	290	300	256	0	0	0	0	0	0	0	0	0
AWV - Initial (Nurse Run)	G0438	0	0	0	0	0	0	0	0	0	4	22	26	28	26	27	0	0	0	0	0	0	0	0	0
AWV - Subsequent (Physician / Non-physician practitioner)	G0439	104	183	170	150	169	218	937	888	716	697	780	929	971	880	911	0	0	0	0	0	0	0	0	0
AWV - Subsequent (Nurse Run)	G0439	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Total Medicare Patients (if known)		90	147	150	107	138	167	1075	988	769	2850	3248	3384	2500	2386	2329	0	0	0	0	0	0	0	0	0
AWV - Total (Physician / Non-physician practitioner)		139	223	211	193	210	257	1208	1129	906	953	1018	1205	1261	1180	1167	0	0	0	0	0	0	0	0	0
AWV - Total (Nurse Run)		0	0	0	0	0	0	0	0	0	4	22	26	28	26	27	0	0	0	0	0	0	0	0	0
AWV - Total (All Providers)		139	223	211	193	210	257	1208	1129	906	957	1040	1231	1289	1206	1194	0	0	0	0	0	0	0	0	0

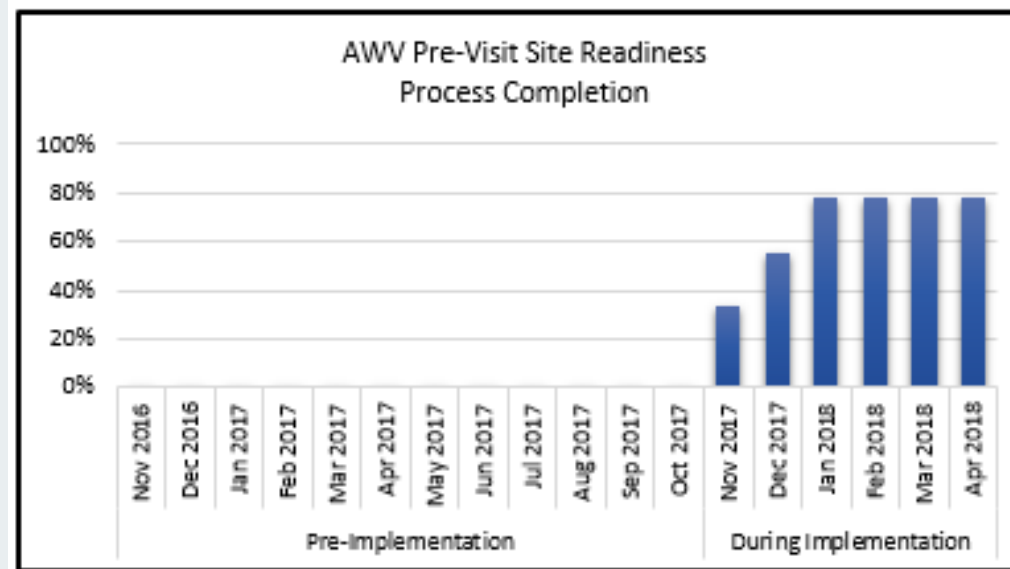


# Data Dashboard Process Measures

- Four Process Measures
  - Pre-visit Site Readiness
    - 9 steps
  - Pre-Visit Patient Readiness
    - 7 steps
  - During the Visit
    - 6 steps
  - Post Visit
    - 8 steps

# Data Dashboard Process Measures

			AWV Process Measures (from Checklists): Enter "1" for each category initiated and completed by																							
Pre-Visit Site Readiness			Pre-Implementation												During Implementation						Post Intervention					
			Nov 2016	Dec 2016	Jan 2017	Feb 2017	Mar 2017	Apr 2017	May 2017	Jun 2017	Jul 2017	Aug 2017	Sep 2017	Oct 2017	Nov 2017	Dec 2017	Jan 2018	Feb 2018	Mar 2018	Apr 2018	May 2018	Jun 2018	Jul 2018	Aug 2018	Sep 2018	Oct 2018
Step	Process (Checklist Items)	Definition / Notes																								
Pre-Visit Site Readiness	1	Identification of Team Members	0	0	0	0	0	0	0	0	0	0	0	0	1	1	1	1	1	1	1	1	1	1	1	1
	2	Team Preparation	0	0	0	0	0	0	0	0	0	0	0	0	1	1	1	1	1	1	1	1	1	1	1	1
	3	Staff Education and Create Training Tools	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
	4	Create a workflow	0	0	0	0	0	0	0	0	0	0	0	0	0	0	1	1	1	1	1	1	1	1	1	1
	5	Create a Health Risk Assessment	0	0	0	0	0	0	0	0	0	0	0	0	1	1	1	1	1	1	1	1	1	1	1	1
	6	Create a Visit Note Template	0	0	0	0	0	0	0	0	0	0	0	0	0	0	1	1	1	1	1	1	1	1	1	1
	7	Create Auditing Tools	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
	8	Create a Pre-Appointment Letter	0	0	0	0	0	0	0	0	0	0	0	0	0	1	1	1	1	1	1	1	1	1	1	1
	9	Setup a Tracking System	0	0	0	0	0	0	0	0	0	0	0	0	0	1	1	1	1	1	1	1	1	1	1	1
Total			0	0	0	0	0	0	0	0	0	0	0	0	3	5	7	7	7	7	7	7	7	7	7	7
Percent			0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	33%	56%	78%	78%	78%	78%	78%	78%	78%	78%	78%	78%



Enter a '1' for each step completed, under each process, in the month it was completed

# Data Dashboard Monthly Progress Report

**1. Please describe your progress in the past month.**

--

**2. What were your biggest challenges in the last month?**

--

**3. Were there any successes or 'pearls' you'd like to share?**

--

**4. What has your experience been like so far being part of this collaborative and do you think it has been helpful?**

--

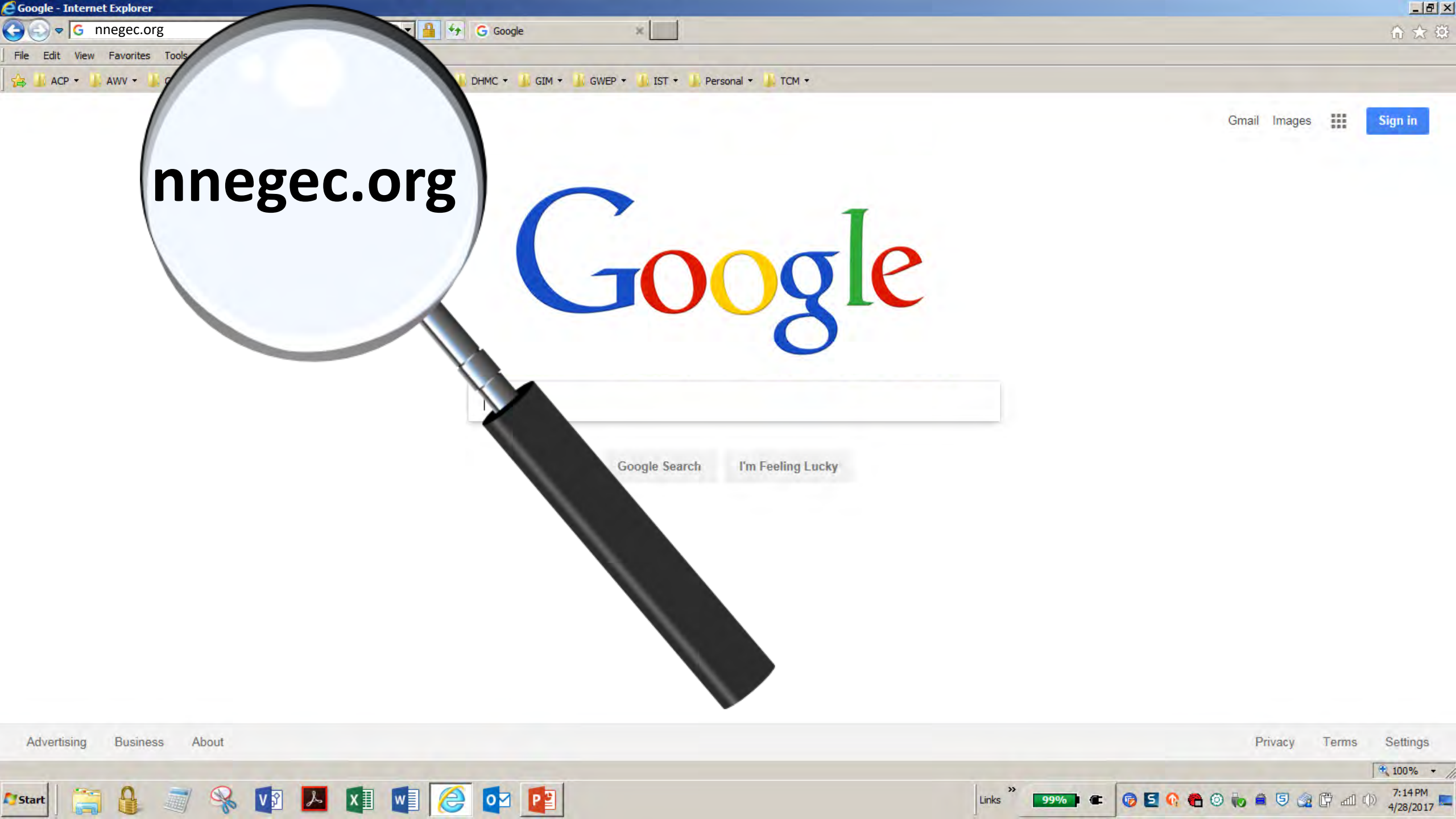
**5. Other comments or feedback? (Optional)**

--

# Data Dashboard Expectations

- Complete pre-implementation data for 12 months
- Data should reflect a generated report on the AWWs billed each month
- Review & update previous months numbers – accounts for lag time in data report
- Data due the second Friday of the month
- ***Pre-implementation data submissions due by March 9th***
- Send a copy of the whole workbook to Tim at Timothy.M.Hesselton@Hitchcock.org

# GWEP's Website

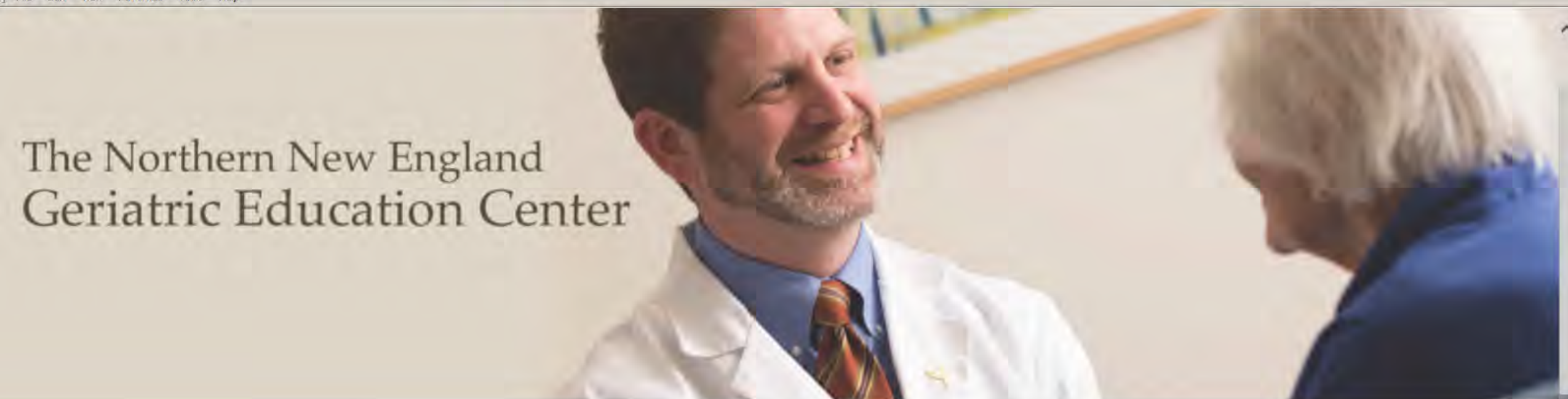


nnegec.org

Google

Google Search

I'm Feeling Lucky



# The Northern New England Geriatric Education Center

## Home Page

[Member Login](#)[About Us](#)[About the Team](#)[Learning Collaborative](#)[Annual Wellness Visit Toolkit](#)[Patient and Family Education](#)

The Northern New England Geriatric Education Center (NNEGEC), also known as the Northern New England Geriatric Workforce Enhancement Program (NNEGWEP), is one of 44 federally funded programs through the Health Resources and Services Administration to the Dartmouth Centers for Health and Aging. The Northern New England Geriatric Education Center (NNEGEC) helps to improve the health and quality of life for older adults in New Hampshire and Vermont by expanding the capacity of the healthcare workforce to provide high-quality, safe, and interdisciplinary care to older adults, with a specific emphasis on rural and underserved areas of New Hampshire and Vermont. Some of NNEGEC's programs include intensive trainings for professionals working with older adults on various subjects, educational materials, and consultation to professionals and providers on best practices in geriatric care. Some of the topics that the NNEGEC has provided education on in the past year include:

- Medicare Annual Wellness Visit

Home Page

Member Login

About Us

Learning Collaborative

**Annual Wellness Visit Toolkit**

Chronic Care Management Toolkit

Geriatric Interprofessional Team Transformation –  
Primary Care

Dementia Care Toolkit

Patient and Family Education

Professional Education

Events

User Registration

## Annual Wellness Visit Toolkit

The NNEGEC team is proud to present the Annual Wellness Visit Toolkit. This toolkit designed to provide primary care practices with educational resources and important forms to conduct the Medicare Annual Wellness Visit effectively and efficiently.

**Like most tools, proper instruction will help you get the most out of the tool.**

### AWV Abstract

- Abstract Poster: Implementing the nurse run AWV - [Poster](#)

### PRE-VISIT SITE READINESS

- AWV – [ABCs](#) / [FAQs](#)
- Comparing Wellness Visits - [PDF](#)
- Preventive & Screening services – [Website](#)
- Practice Flow - [Checklist](#) / [Swim Lane](#)
- Scheduler - [Training](#) / [One-Pager](#)
- HRA - [Requirement](#) / [Sample](#)
- Note Template – [Layout](#) / [EPIC Sample](#)
- Visit Auditing Tool - [PDF](#)
- AWV Video - [Video](#)

### PRE-VISIT PATIENT READINESS

- Patient Introduction Letter - [Word](#)
- Pre-Appointment Letter - [Word](#)
- Home Safety Checklist – [PDF](#)
- How's Your Health – [Website](#)

### DURING VISIT ASSESSMENTS

### POST-VISIT

#### • Health Risks

- Alzheimer's Association - [Website](#)
- Curbside for Dementia - [Dementia Care Page](#)
- Dementia, The Journey - [Patient and Family Education Page](#)
- Dartmouth-Hitchcock ARC – [Website](#)
- Health & Human Services - [NH](#) / [VT](#)
- Healthy Aging (CDC) - [Website](#)
- NCOA Falls - [Website](#)
- Falls Prevention – [NH](#) / [VT](#) / [Stop Falls](#)

#### • Psychosocial Risks

- Mental Health (CDC) - [Website](#)

#### • Behavioral Risks

- Assessing and Counseling Older Drivers – [Website](#)
- Elderly Driver Safety (DMV) – [Website](#)
- Tobacco Prevention – [NH](#) / [VT](#) / [DH](#)

#### • ADL

#### • IADLS

- Scams That Target Older Adults (CFPB) – [Website](#)
- Tips to Avoid Financial Exploitation – [Website](#)

**Medicare Annual Wellness Visit Auditing Tool**  
**To bill Medicare Annual Wellness Visit you must be able to check each box**

**Health Risk Assessment**

Demographic data  
 Age  
 Gender  
 Race / Ethnicity  
 Self-assessment of health status  
 Health status  
 Frailty  
 Physical functioning  
 Memory  
 Psychosocial risks  
 Depression / life satisfaction  
 Stress / anger  
 Loneliness / social isolation  
 Pain  
 Fatigue  
 Behavioral risks  
 Tobacco use  
 Physical activity  
 Nutrition  
 Oral health  
 Alcohol consumption  
 Sexual practices  
 Motor vehicle safety (seat belt use)  
 Home safety  
 ADL  
 Dressing  
 Bathing  
 Walking  
 IADL  
 Shopping  
 Housekeeping  
 Managing own medications  
 Handling finances  
**Establish**  
 List of current providers  
 List of current suppliers  
 Past medical history  
 Past surgical history

Medications  
 Supplements (calcium & vitamins)  
 Allergies

Family history  
 Parents  
 Siblings  
 Children

**Screening instrument**

Depression – for beneficiaries without current diagnosis of depression

**Direct observation or screening questions / questionnaire recognized by national professional medical organizations**

ADLs  
 Fall risk  
 Hearing impairment  
 Home safety

**Obtain**

Height  
 Weight  
 BMI / waist circumference  
 Blood pressure

**Assess by direct observation with due consideration of information obtained via beneficiary reports and concerns raised by others**

Cognitive impairment

**Establish written screening**

Screening schedule

**Establish a list of risk factors with recommended interventions**

Risk factors including treatment options with associated risks and benefits

**Furnish personalized health advice & referral, as appropriate, to health education or preventive counseling services or programs**

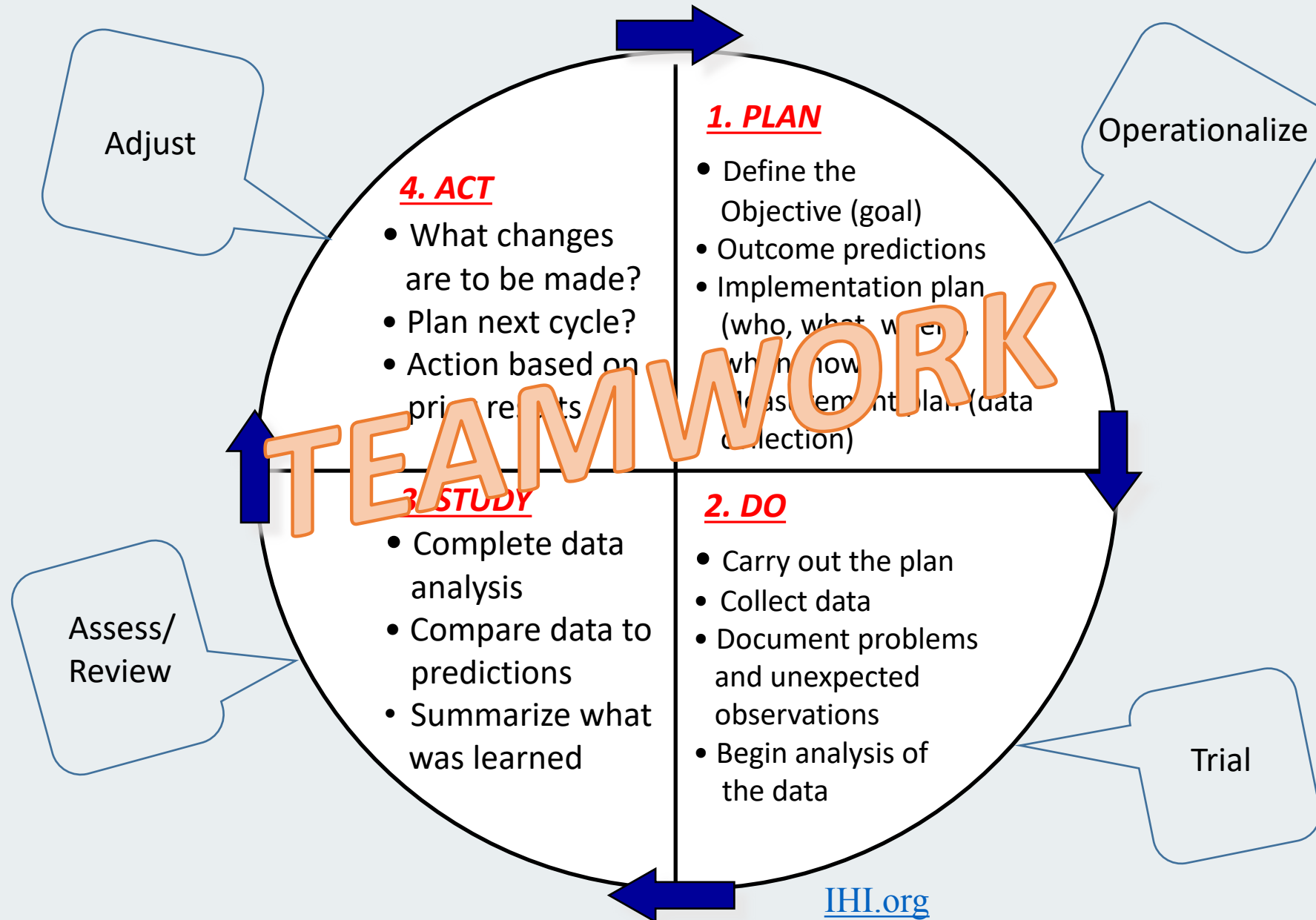
Personalized health advice & referrals as appropriate



# Skills Burst: PDSA



# The P-D-S-A Cycle



# PDSA Documentation Worksheet

Team/Practice Name: \_\_\_\_\_

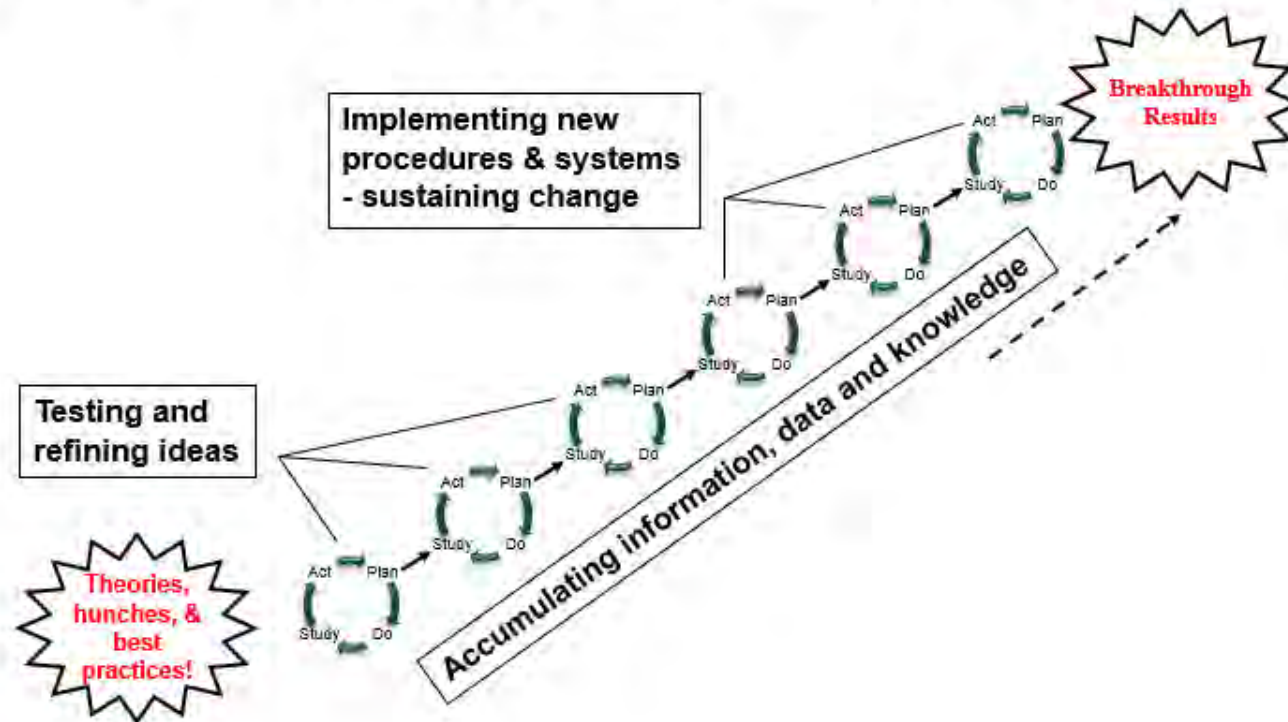
Overall Team/Project Aim: \_\_\_\_\_

Objective (what are you going to measure): \_\_\_\_\_

Cycle	PLAN			DO		STUDY		ACT
	We plan to:	When: (Date)	Done as planned ? Y/N	Observations	What did we learn?	Conclusions from this cycle	Modification(s) for next cycle	
1								
2								
3								
4								
5								
6								
7								
8								
9								
10								

# P-D-S-A Cycles to Test Changes

## Multiple PDSA Cycles to Test Changes



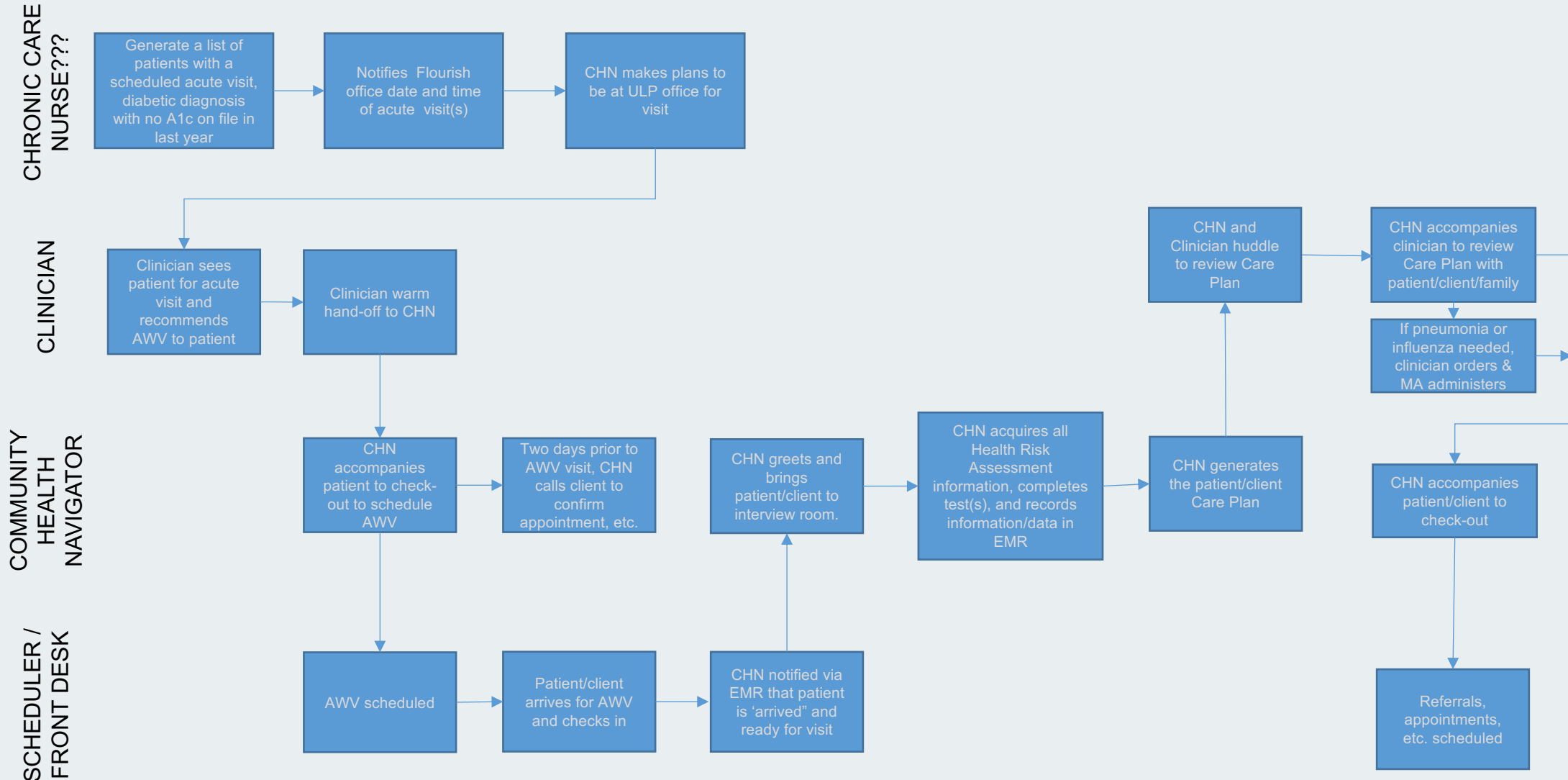
# Discussion

# Discussion

- Quick update on where your practice is with AWW implementation – Any progress since Bootcamp?
  - Institute for Sustainable Health and Optimal Aging
  - University of Louisville Physicians - Family Medicine at Newburg
- Dates for ongoing Learning Collaboratives

## P-D-S-A #1

## University of Louisville Geriatrics-Newburg



# What's Next

Date	Topic	Content & Activities	Data Due
2/27/2018	Overview of the Journey	Introduction to Learning Collaborative Expectations & Ground Rule Data Dashboard Review & Expectations GWEP's Website Skills Burst: PDSA Discussion	3/9/2018
3/??/2018	Pre-Visit Site Readiness	Measurements Update Practice Progress Report Pre-Visit Site Readiness Checklist Skills Burst: Flow Mapping & Swim Lane Flow Charts Discussion	4/13/2018
4/??/2018	Pre-Visit Patient Readiness	Measurement Update Practice Progress Report Pre-Visit Patient Readiness Checklist Skills Burst: Based on Need Discussion	5/11/2018
5/??/2018	During the Visit	Measurement Update Practice Progress Report During the Visit Checklist Skills Burst: Using Your EMR's Tools Discussion	6/8/2018
6/??/2018	Post Visit	Measurement Update Practice Progress Report Post Visit Check List Skills Burst: Poster Development Discussion	7/13/2018
7/??/2018	Sustaining	Measurement Update Practice Progress Report Final Debrief and Adjournment of Learning Collaborative	8/10/2018

Thank You!