Integration Begins at the Top

John V Caron, DMD, MPH
National Primary Oral Health Conference
October 26, 2011
Cliff Notes:

• HealthPoint’s experience

• Integration starts at the top

• Integration means more than clinical services

• A healthcare home without integration is just a house of services
8 Medical Locations
210,865 Visits
148,993 Medical
34,250 Dental
17,072 Behavioral
10,550 Complementary and Alternative

455 Employees

2010
62,562 Patients

Locations

HealthPoint
Your Community Health Center

40th Anniversary
Integration:

(from the Latin *integer*, meaning whole or entire) generally means combining parts so that they work together or form a whole.

Products, components or groups said to be integrated appear to meet one or more of the following conditions:

A) They share a common purpose or set of objectives.

B) They all observe the same standard or protocol.
Integration as a Team Concept

- Beyond mission and vision
- Shared common purpose
- Shared values
Integration as a Team Concept

Matrix Organization

- Project Management Organization
- Functional Manager
- Functional Manager
- Functional Manager
- Project Manager
- Team Member
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- Team Member

Colored Boxes Represent Team Members Assigned to the Same Project
<table>
<thead>
<tr>
<th></th>
<th>CEO</th>
<th>COO</th>
<th>CFO</th>
<th>Planning &amp; Development</th>
<th>Med Dir</th>
<th>Dent Dir</th>
</tr>
</thead>
<tbody>
<tr>
<td>Medical Operations</td>
<td>Team Member</td>
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<td>Dental Operations</td>
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<td>Medical Support</td>
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<td>Resource Management</td>
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<td>Information Systems</td>
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<td>Human Resources</td>
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Developing An Integrated Leadership

Executive Leadership Team
- Come together around a common purpose and shared values
- Rise to the “purposeful” level of performance

Board
Purposeful Leadership

“Purposeful Leadership is the art and science of harmoniously coordinating the minds of an organization towards a clearly defined shared vision while cultivating a corporate culture committed to continuous learning and improvement.”

Niurka
Executive Leadership Team

Chief Executive Officer
Chief Financial Officer
Medical Director

Chief Operations Officer
Director for Planning and Development
Dental Director

Integrity:
We have high expectations and support for honesty, sincerity, and standing up for beliefs.

Responsibility:
We collectively accept a high level of accountability for meeting or exceeding business and organizational goals.

Core Purpose:
“We are creating a better world by guiding individuals, families, and communities to health and well-being, and transforming the concept of healthcare.”

Wisdom:
The team considers both the large context of the business and the long range impact on society in making strategic business decisions (What would our customers say?)

Creativity
We encourage imaginative thinking and are willing to entertain new and challenging opportunities

Cooperation:
As a team, we take care of ourselves, we take care of each other and we take care of the place.
Behaviors supporting our Team Values

**Integrity**
- Share your perspective
- Listen to understand
- Consider other perspectives
- Engage in open and honest dialogue
- Assume best in others; assume positive intent
- Align with our core purpose
- Create an environment of safety with each other to speak up

**Creativity**
- What is new and innovative about ____?
- What problems or opportunities are we facing?
- We are continually transforming (not just satisfied in testing what we have)
- We learn from within and the outside world and knowledge that might apply to a new way of thinking

**Cooperation**
- Ask for and offer help and expertise

**Wisdom**
- How does this align with our purpose, mission and strategy?
- What is the business case?
- Do we have the information we need to make a wise decision?
- Can we function in an ambiguous situation and make the best decision possible?

**Responsibility**
- Do what we say we are going to do or renegotiate in a timely manner
- Make decisions and clearly communicate that we support it as one
- Set expectations
- Monitor progress
- Celebrate success
- Be open to revisiting decisions with new information

Created 12/11/09
Directors Team

Pharmacy Director
Finance Director
Human Resources Director
Information Systems Director

Dental Operations Director
Medical Operations Director
Assistant Medical Director
Revenue Management Director

Core Purpose:
“We raise the bar in every decision we make to achieve the greater good. We speak with one voice.”

Integrity:
We have high expectations and support for honesty, sincerity, and standing up for beliefs.

Respect:
We demonstrate a high value for each other’s contribution and each other as an individual.

Cooperation:
As a team, we work well together.

Wisdom:
The team considers both the large context of the business and the long range impact on the community in making strategic business decisions.

Creativity
We encourage imaginative thinking and innovation.
Behaviors supporting our Team Values

**Integrity**
- Transparency:
  - What we are thinking?
  - Why we are thinking it?
  - Here are my concerns.
- We will do what we say we are going to do or we will renegotiate in a timely manner.

**Creativity**
- Having different frameworks to explore issues creatively.
- Having a disciplines approach by using research, best practices and knowledge.
- What do we know?
- What don’t we know.
- What do we need to learn?

**Cooperation**
- We will have a higher level of participation in decision making and problem solving.
- We will ask for and offer help.

**Wisdom**
- When we are considering a decision we will ask ourselves how does this align with our strategic initiatives?

**Respect**
- We will be honest with each other about the impact of their words and actions.
- We will seek to understand another’s intention.
- We will ask and listen for other’s perspective without judgment.
- We will ask questions for clarity and share our understanding of what the other is saying.
Developing An Integrated Leadership

**Executive Leadership Team**
- Come together around a common purpose and shared values
- Rise to the “purposeful” level of performance
- Develop a strategic direction that incorporates team integration
- Align the board and organization to the strategic direction
- Develop a few key measures to monitor strategic direction

**Board**
- Adopt the strategic direction
- Accept and monitors key measures
Mission:

HealthPoint strengthens communities and improves people’s health by delivering quality health care services, breaking down barriers and providing access to all.

Strategic Direction:
Our communities are the healthiest in the nation.
Health Care Home

Our “Health Care Home” is a philosophy of care that effectively engages the Health Center with its community to improve the health status of the population through “team partnerships” to ensure health care services are provided in a high quality, safe, and comprehensive manner.
Attributes of a Health Care Home

1. Accessible
2. Continuous and Sustainable
3. Coordinated and Comprehensive
4. Family Centered and Whole Person Oriented
5. Compassionate and Culturally competent
6. Environment of Quality and Safety
# Attributes of a Health Care Home

## 1. Accessible

<table>
<thead>
<tr>
<th>Attributes</th>
<th>Examples</th>
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</thead>
<tbody>
<tr>
<td>- Patients get care when, where and how they want and need it.</td>
<td>- Advance access work</td>
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<tr>
<td></td>
<td>- For “our” patients we have appointments available</td>
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<td></td>
<td>- Interpreters available</td>
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<td></td>
<td>- Sliding scale available</td>
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## Attributes of a Health Care Home

### 2. Continuous and Sustainable

<table>
<thead>
<tr>
<th>Example</th>
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<tr>
<td>- The relationship persists regardless of changes in insurance or coverage</td>
</tr>
<tr>
<td>- Each patient has an ongoing relationship with a personal provider trained to provide first contact, continuous and comprehensive care</td>
</tr>
<tr>
<td>- Advocacy is part of the work we do</td>
</tr>
<tr>
<td>- We are trainers of future generations of health care providers</td>
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<table>
<thead>
<tr>
<th>Example</th>
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<tbody>
<tr>
<td>- Every patient seen in medical has an identified Primary Care provider</td>
</tr>
<tr>
<td>- We educate ATSU students and students from other schools to create a pipeline of providers.</td>
</tr>
<tr>
<td>- We send recalls to invite patients in for care in dental and in medical.</td>
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</table>
### Attributes of a Health Care Home

#### 3. Coordinated and Comprehensive

<table>
<thead>
<tr>
<th><strong>Examples</strong></th>
<th><strong>Attributes</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td>- NextGen facilitates coordination amongst dental, medical and pharmacy</td>
<td>- The continuum of care will be coordinated by an accountable healthcare team</td>
</tr>
<tr>
<td>- We encourage a continuum of care by our work with Headstart by dental, and a new emphasis to get 1 yr olds into dental from medical</td>
<td>- Care plans are developed with the patient, family, and other involved care providers and agencies</td>
</tr>
<tr>
<td>- We are pursuing notes from ERs and specialists who see our patients</td>
<td>- The patient’s health record is accessible, but confidentiality is maintained</td>
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## Attributes of a Health Care Home

### 4. Family Centered and Whole Person Oriented

<table>
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<tbody>
<tr>
<td>- Families and patients are involved at all levels of decision making</td>
</tr>
<tr>
<td>- Behavioral Health Consultants, RNs, CAM providers and case managers assist patients and families to make decisions and behavior changes leading to improved health.</td>
</tr>
<tr>
<td>- Pregnant medical patients are encouraged to establish a dental home during their pregnancy</td>
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</table>
## Attributes of a Health Care Home

### 5. Compassionate and culturally competent

<table>
<thead>
<tr>
<th>-The patient’s and family’s cultural needs are recognized, valued, respected and incorporated into the care provided</th>
<th>Examples</th>
</tr>
</thead>
<tbody>
<tr>
<td>- We hire staff from many of the communities we serve</td>
<td>- We facilitate transportation when needed</td>
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<tr>
<td>- We partner with groups serving specific population groups such as Lutheran Community Services</td>
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</table>
## 6. Environment of Quality and Safety

<table>
<thead>
<tr>
<th>Examples</th>
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<tr>
<td>- We use nationally recognized guidelines to decide when to invite patients in for health care screenings or monitoring of chronic disease</td>
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<tr>
<td>- We set self-management goals with our patients who have chronic diseases</td>
</tr>
<tr>
<td>- NextGen facilitates running reports for managing the care of our patient populations</td>
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</tbody>
</table>

- Evidence-based medicine and clinical decision-support tools guide decision-making
- The practice accepts accountability for continuous quality improvement and learning
- Patients actively participate in decision-making and feedback is sought to ensure patient expectations are being met
- Information technology is utilized appropriately to support optimal care, performance measurement, patient education and enhanced communication
- The care we provide is: safe, effective, patient centered, timely, efficient, and equitable
Integration

Patient Centered Health Care Home

Adminstration
Medical
Dental
Patient
Behavioral Health
Complementary Alternative Medicine
Pharmacy
Mission:
HealthPoint strengthens communities and improves people’s health by delivering quality health care services, breaking down barriers and providing access to all.

Strategic Direction:
Our communities are the healthiest in the nation.

Areas of Focus
- Well-being
- Clinical Outcomes
- Quality of Care
- Financial Stewardship
- HealthPoint niche
- Customer service (clients and employees)
- Revenue Maximization: Current and Future
- Healthcare Home
- Healthcare Reform
- Patient and community engagement
- Connections to Key Organizations and Community Leaders
- Street reputation
- Obesity rates - Body Mass Index (BMI) over 30
  Baseline: 08 – 09 = 3.5% increase  Target: 0%
- The DUKE Health Profile (measure of emotional/physical health)
  Baseline: Collected 3Q 2010  Target: TBD
- Net Income
  Baseline: 2009 = 4%  Target: 5%
- Net Operating Expense
  Baseline: 2009 = -11%  Target: 0%
- Managed Care Enrollment
  Baseline: 2009 = 19410  Target: TBD
  2010 budget = 22,690
- Resources to care for uninsured
  Baseline: 2009 = $101.89 rev per visit  Target: $230
- Patient satisfaction – % who definitely will refer
  Baseline: 2009 Medical = 79.2%  Target: 90%
  2009 Dental = 84.4%  Target: 90%
- Employee Turnover
  Baseline: 2009 = 21.7%  Target = 18%
- Patient Satisfaction – appointment availability
  Baseline: 2009 Medical = 84%  Target = 89%
  2009 Dental = 75.6%  Target = 80%
- Integration - % patients accessing 2 or more services
  Baseline: 2009 = 26%  Target = 40%
- Integration - % pregnant patients with one dental visit in 9 mo.
  Baseline: 2009 = 30%  Target = 50%
- # of individual donors
  Baseline: 2009 = 120  Target = 500
- Awareness of HealthPoint
  Baseline: Number of hits on our website  Target = 1M
- Board participation in external activities
  Increase Board participation in 3+ activities to 100%

3-5 years
Integrating Staff Leadership

The Clinic Leadership Teams

- Site level teams
- Site Managers and Lead Providers
- Dental sites include front and back office coordinators
- Monthly meetings with CEO, Operations and Clinical Directors
- Alignment with Strategic Direction and Key Measures
Staff Integration the Process

• Executive Leadership Team developed the Strategy Map and 14 Key Measures

• ALL STAFF brainstormed activities to accomplish Key Measures at an all staff retreat

• Executive Leadership Team, Directors Team, and Clinic Leadership Team together discussed activities and prioritized them into timeframes (120 days, 1 year, 2013)

• Executive Leadership Team selected executive sponsors and team leaders to follow up on activities for each of the Key Measures
Key Measure #10: Integrated Care. Increase the % of patients accessing 2 or more services to 40% by end of 2013

Executive Sponsor: John Caron

Team Leader: Pamela Gorsuch

Activities that will drive progress in 120 days:
- Standardized brochures list services and special events/activities; educate staff on all services; patient surveys about needs/wants
- Integrate medical and dental teams completely; expand dental access
- Information booths in lobbies with CSR or PCC to answer questions, give out information
- Some type of DVD or photos advertising our services, providers, clinic mission, etc. in each lobby
- Sign/poster in all waiting rooms (medical/dental) with interest signup
- Patient education: phone messages, TV (lobby), DVD about HealthPoint services, lobby bulletin board with “service of month,” staff education about HealthPoint services

Activities that will drive progress in one year:
- Group visits with multiple providers; outreach to cultural groups; TV monitors with ads and information in waiting rooms
- Streamline internal referral process; followup on internal referrals to be sure patient made appointment; expand warm handoffs to CAM, nutrition – have slots available in schedule; share best practices
- Video of all services on each computer in exam room (like Group Health)
- Advertising/informing not only staff but patients about our topics of the month; referring to appropriate providers
- Incentivize patients who engage in their care by using a new service at HealthPoint
- Change/add hours for medical, dental, pharmacy

Activities that will drive progress in long term (December 2013):
- Call center ability to schedule all appointments (dental, WIC, mammo); also offers other appointments while on phone procedure; EPM alerts for health maintenance (help call center & FO)
- Advertising and education: inform/advertise services – videos in waiting room, brochures, posters in waiting room and exam rooms – include price lists, multiple languages; have info on services while on phone hold
- Coupon book for discounted first visit for other services
- Increase advertising in the media and with community partners
- Better integration between M/D by having a dentist or hygienist go to the clinics without dental clinic to see patients monthly or dental van
- Add more in-house specialties: dermatology, neurology, orthodontist, ortho, radiology, psychiatry, ENT, oral surgeon
Key Measure #10 Integrated Care

40% of Dental patients are also Medical patients

12% of Medical patients are also Dental patients
Locations
8 Medical
4 dental
Facilities Development (example)

Average Panel Size Medical
1800

Average Number of visits per patient
2

Average Number of visits per FTE physician
3600

Average Number of exam rooms to support visits
3

1200

Average Panel Size Dental
1500-1600

Average Number of visits per patient
2

Average Number of visits per FTE dentist
3000

Average Number of chairs to support visits
2

1500

1500
Right Sizing

- 12 exam rooms
- 1 procedure room
- 9 dental operatories
Key Measure #11: Integrated Care. Increase the % of pregnant medical patients with at least one dental visit in the 9 months prior to delivery to 50% by end of 2013

Key Measure #11a: Integrated Care/ Increase the % of medical children ages 0-2 with a dental visit to 20% by end of 2013

Executive Sponsor: John Caron Team Leader: Pamela Gorsuch

Activities that will drive progress in 120 days:
- Automatic referral to dental for all pregnant patients
- Referral to dental and follow-up every to ensure patient went to appointment
- Patient education/flyer in OB packets
- Referral at OB intake and ask at each follow-up if they went
- Giving dental a list of OB patients and having dental call and make dental appointments (2 PCC can coordinate services), designated OB slots for dental

Activities that will drive progress in one year:
- Education packets: more focus from medical and dental about why dental care is important in pregnancy, standard packets to give to all pregnant women
- Education
- NextGen – add dental check box to standardize process of dental referral; MA or dental clinic doing call backs for appointments
- Educate patients about why it is important; assurance that X-ray is OK
- Position of OB coordinator's

Activities that will drive progress in long term (December 2013):
- Changing how to schedule: integrate medical and dental scheduling, several slots each week specifically for pregnant women
- Expand patient referrals and add PCC to every dental clinic – increase dental staff
- Opening multicultural SeaTac dental clinic; overcome multiple language barriers
- More dental staff – either a PCC in dental clinics or a dental clinic with each medical site (specifically those with OB)
- Opening more dental clinics/ more access to dental
Integrated Electronic Health Record
Key Measure #11: Increase the % of pregnant medical patients with one dental visit prior to delivery to 50% by end of 2013.

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<thead>
<tr>
<th>Month</th>
<th>Aug-10</th>
<th>Sep-10</th>
<th>Oct-10</th>
<th>Nov-10</th>
<th>Dec-10</th>
<th>Jan-11</th>
<th>Feb-11</th>
<th>Mar-11</th>
<th>Apr-11</th>
<th>May-11</th>
<th>Jun-11</th>
<th>Jul-11</th>
</tr>
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<tbody>
<tr>
<td>%</td>
<td>30.8%</td>
<td>29.0%</td>
<td>29.8%</td>
<td>29.0%</td>
<td>30.1%</td>
<td>32.3%</td>
<td>29.4%</td>
<td>29.2%</td>
<td>29.6%</td>
<td>28.4%</td>
<td>27.7%</td>
<td>26.3%</td>
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Key Measure #11a: Increase the % of medical children ages 0-2 with a dental visit to 20% by end of 2013

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<tr>
<th>Month</th>
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<tr>
<td>%</td>
<td>4.4%</td>
<td>4.2%</td>
<td>3.9%</td>
<td>3.9%</td>
<td>4.2%</td>
<td>4.2%</td>
<td>4.6%</td>
<td>6.0%</td>
<td>7.0%</td>
<td>7.4%</td>
<td>8.4%</td>
<td>8.7%</td>
</tr>
</tbody>
</table>
Percent of medical children ages 0-2 with a dental visit at HealthPoint 2009-2011ytd

- Auburn: 16.4%
- Federal Way: 7.2%
- Kent: 23.3%
- Redmond: 18.2%
Train and Collaborate to integrate

- Physicians
- Interpreters
- Clinic Leadership Team
- Health Center Managers
- Patient Care Coordinators
- Medical Assistants
- Client Service Representatives
- Front and back office Coordinators
- Promotoras - volunteers
Smiles for Life is the nation’s only comprehensive oral health curriculum. Developed by the Society of Teachers of Family Medicine Group on Oral Health and now in its third edition, this curriculum is designed to enhance the role of primary care clinicians in the promotion of oral health for all age groups through the development and dissemination of high-quality educational resources.

**For Individual Clinicians**

We’ve made it easy for individual physicians, physician assistants, nurse practitioners, students, and other clinicians to access the curriculum and learn on their own time and at their own pace. Each of the courses is available online. Free CME credit is available.

**For Educators**

The curriculum is available in a presentation format easily implemented in an academic setting. Included is a comprehensive set of educational objectives based on the Accreditation Council for Graduate Medical Education (ACGME) competencies, test questions, resources for further learning, oral health web links, an implementation guide, and detailed outlines of the modules.

Funded by:

- DentaQuest Foundation
- Washington Dental Service Foundation

Endorsed by:

- American Academy of Family Physicians
- American Academy of Pediatrics

A Product of:

- Society of Teachers of Family Medicine
Integrating Medical/Dental Education

- **ATSU SOMA**
  - One of 11 sites
  - 10 medical students years 2, 3, 4
  - Dental rotation 2nd year
  - 7 hour course on Oral Health

- **ATSU ASDOH**
  - One of 52 sites
  - 3 4th year dental students
  - 4-6 week rotations
  - Integrated medical/dental record
  - Meet with medical students monthly
ATSU SLOMA Class of 2011
Summary

• Create Purposeful Leadership environment
• Establish an integrated Strategic Direction
• Define an integrated Health Care Home
• Right-size capacity to support integration
• Install an integrated electronic Health Care Record
• Train all levels of the organization to sustain integration
Challenges

- Reimbursement
- Clinic Locations
- Other sources for care
- Patient and Staff attitudes and preconceptions
Opportunities

- Medical and Dental panels
- Dental as part of a Medical Team
- Health Care panels
- Integrated Health Care Team

- Screensaver