

West County Health Centers, Inc.
Clinical Protocol

Clinical Protocol:	Complex Care Management Intake	Category: Clinical
Staff Role:	RN Care Management	

Protocol Summary: Overview of intake process for initial interview with new patient in Complex Care Management program. Goal of intake is to 1) begin to establish a trusting, relational connection with the patient and care givers in their environment, 2) perform a broad overview of skills, strengths, resources and potential barriers to health, 3) assist patients and care givers in developing a realistic initial care plan, 4) communicate and coordinate care plan with Care Team.

- 1) Introduce the patient (and family/care givers if appropriate) to the Complex Care Management program. This will be more effective if it is coordinated with the Care Team and particularly the Care Team Provider. Strategically transferring the trust established by the Care Team provider or other members of the Care Team will allow the relationship to be more effective in behavior change.
- 2) Establish time and location of initial intake. This will likely take 1 ½ to 2 hours. Preferably this should be done at the patient's home or care environment and include significant family or care givers.
- 3) Perform a broad survey of skills, resources and potential barriers to health using the Comprehensive Assessment, SF12, PHQ9 and Patient Activation Measure.
 - Comprehensive Assessment – designed understand a get a broad range of information about the patient that may be helpful in further understanding relevant factors that contribute to the patient's current state of health and that could assist in creating a realist care plan. Comprehensive assessment can be completed using the "RN Care Management Intake" eCW template
 - SF 12 – goal for this survey is to capture practical, reliable, and valid information about functional health and well-being from the patient's point of view. This can be used as a marker of health over time from the patient's perspective.
 - PHQ9 – this survey is a validated marker of depression which can be trended over time.
 - Patient Activation Measure (PAM) – this measure is designed to gauges the knowledge, skills and confidence essential to managing one's own health and healthcare. The PAM assessment segments patients into one of four progressively higher activation levels.
- 4) Using the information gained from the 4 intake surveys, guide the patient and care givers toward a realistic initial care plan. Using skills of motivational interviewing is an important part of this step.
 - The care plan should include one or two areas of focus, be specific in what, when, how the plan will be carried out and next steps for the Care Team.
 - The Care Plan should also include areas of focus that you have identified from your intake that you will want to be strategic about in future interactions or to guide the Care Team in their management of care. The PAM level should guide level of focus and coaching style and complexity. (This portion can be completed after the intake session)
- 5) Establish a follow up plan with the patient and care givers.
- 6) Document the 4 assessments and Care Plan in eCW.

- 7) Meet with the Care Team to review the intake surveys and care plan (see RN Complex Care Management Case Conference protocol)

Effective Date:	Revision Date:
Supervisor Approval: <i>Initial</i>	Medical Director Approval: <u> JLC </u> <i>Initial</i>