Shared Governance Led Pilot to Implement a Multidisciplinary Case Review Process

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Background
- Ambulatory Care Management (ACM) is a multidisciplinary team, providing telephonic chronic disease management care in Wisconsin and Illinois.
- With an increase in the age and complexity of individuals with chronic disease, there has been a greater need for ACM services.
- Inpatient environments have successfully utilized Multidisciplinary Case Review (MCR) teams to optimize patient outcomes, facilitate collaboration, and expedite plans of care.
- Implementation of an MCR process would support IHI’s Quadruple Aim for Healthcare.

Methods:

**Process Planning**
- ACM PC identified key elements to support the MCR process:
  - Identify participating roles/disciplines
  - Identify priority patient populations
  - Develop defined workflows for participants
  - Implement use of template for preparation and presentation
  - Use technology to support information gathering and sharing
- Wisconsin Star Method was selected as template for MCR².

**Methods (Continued)**

**MCR Team**
- Defined MCR roles and responsibilities:
  - MCR Facilitator
  - MCR Case Presenter
  - MCR Coordinator
- Identified required participants for MCR based on current evidence and departmental needs
- Identified additional ad-hoc participants to include based on clinical concerns

**Toolkit Development**
- Use of a template for MCR supports consistency in process and outcomes.
- ACM PC used Wisconsin Star Method and key elements to create a Toolkit.
- MCR Toolkit includes:
  - Recommendations and Guidelines
  - Preparation Tool (Fig. 2)
  - Summary Tool
  - Teammate Education

**Pilot Implementation**
- Following establishment of process, team and tools, ACM PC organized a pilot of the new MCR Method.
  - Clinical cases identified to pilot new processes and tools.
  - Cases presented virtually to Multidisciplinary Team utilizing Microsoft Teams.
  - Participants completed post-MCR survey.

Outcomes / Conclusions
- ACM Practice Council identified that standardization of MCR improves clinician preparedness and promotes uniformity of the communication process.
- Feedback obtained following the pilot phase indicated:
  - The MCR provided clear interventions to utilize in practice.
  - The MCR was organized and easy to understand.
- MCR attendees felt comfortable participating.

Implications for Practice
- MCR utilizes a multidisciplinary approach and a standardized framework to explore patient scenarios with the primary goals of optimizing patient outcomes, facilitating collaboration, and executing care planning.
- MCR can be an effective tool to assist in identifying interventions for use when managing patients with complex chronic conditions and/or barriers to care.
- Future research is needed post pilot phase to understand if there are any gaps in implementation or barriers to use across departments or in virtual settings.

References

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