



A Day in the Life of the ECM Team Member

Practical Tips for Organizing the Work

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A DAY IN THE LIFE OF THE ECM TEAM MEMBER: TIPS FOR ORGANIZING THE WORK

AGENDA:

1. Introduction and Health Plan Updates
2. Review the ECM & Community Support Activities
3. Discuss routine and daily activities
4. Ideas, skills and tips to get organized



LEARNING OBJECTIVES

Upon conclusion of this webinar, participants will be able to:

1. Describe how to rank order the routine ECM tasks
2. Prioritize ECM activities
3. Time management skills 101
4. Name at least three tips for organizing the ECM workload
5. When to ask for help

Your ECM Support Team

Your Practice Coaches



Laura Collins, LICSW
Santa Cruz County



Karen Hill, PhD, ANP-C
Monterey County



Deb Peartree, RN, MS
Merced County



Marc Avery, MD
Curriculum Design Lead



Liz Arjun, MPH, MSW
Project Manager



**A TYPICAL ECM
DAY
THERE IS NO
SUCH ANIMAL!**

How often have you felt like you just can't get it all done or don't know where to start?

Poll

1. **Most days-I** just don't know where or how to get started!
2. **Occasionally**-some days just fall apart!
3. **Never**-I have it all together!



What are the biggest time-drains of your day?

– check all that apply



1. The time it takes for me to **document** my work.
2. Figuring out how to use the **documentation software**.
3. Figuring out the ECM **documentation requirements**.
4. How to develop a **care plan and SMART patient goals**.
5. **Chasing down authorizations** that are either approved, denied or lost
6. **Delayed responses** from agencies after submitting my **referral**.
7. **Patient's** that have been **to the ER, hospitalized**, or in some sort of transitional state.
8. **Housing** Resources
9. **Too many meetings** and no time to produce the work.
10. **Too many interruptions** during the day-I can never finish a task.

In Chat: List One or Two Things You Would Like to Learn Today About Organizing Your Work





Refresher: THE WHY



The “Why” of the ECM Care Manager: Goals & Roles

- Identify and manage patients' risk and needs [medical-behavioral] through patient-centered approaches
- Explore and address the social determinants of health
- Help develop a more consistent and seamless system by reducing complexity and increasing flexibility of services
- **Improve quality outcomes and experience**



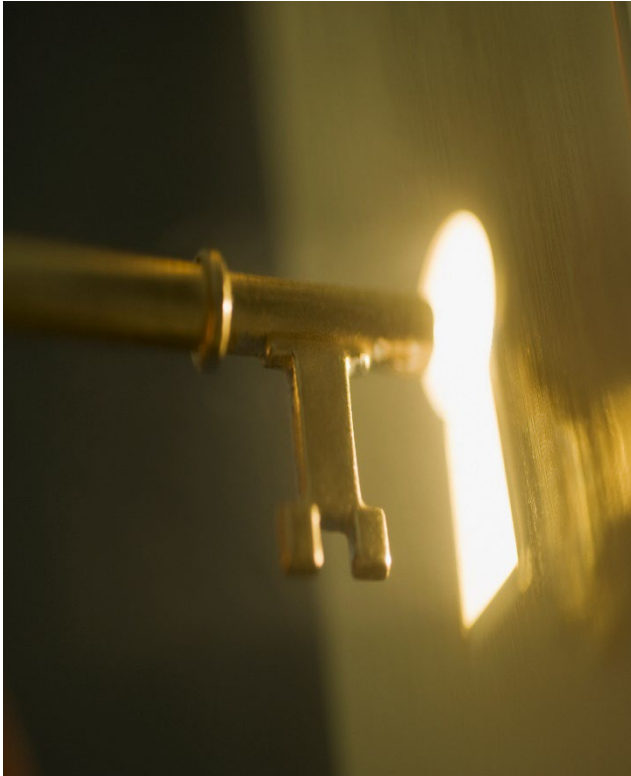


Enhance Care
Management

ROLE OF ECM CARE MANAGER

- Providing new information & perspective to the multidisciplinary team that are important to health outcomes
- Support health goals selected by patient-advocacy
- Support treatments initiated by multidisciplinary team
- Eyes and ears for the multidisciplinary and keep them apprised of patient updates, changes and needs

Key Tasks of the ECM Care Manager



Patient outreach & engagement, education and support for health promoting behaviors and adherence

Monitor patient progress through standardized reassessment /measurement-based care, brief interventions, behavior change

Help patients set goals and promote self-management

Communicate key info to multidisciplinary team and patient about concerns and progress in your case load

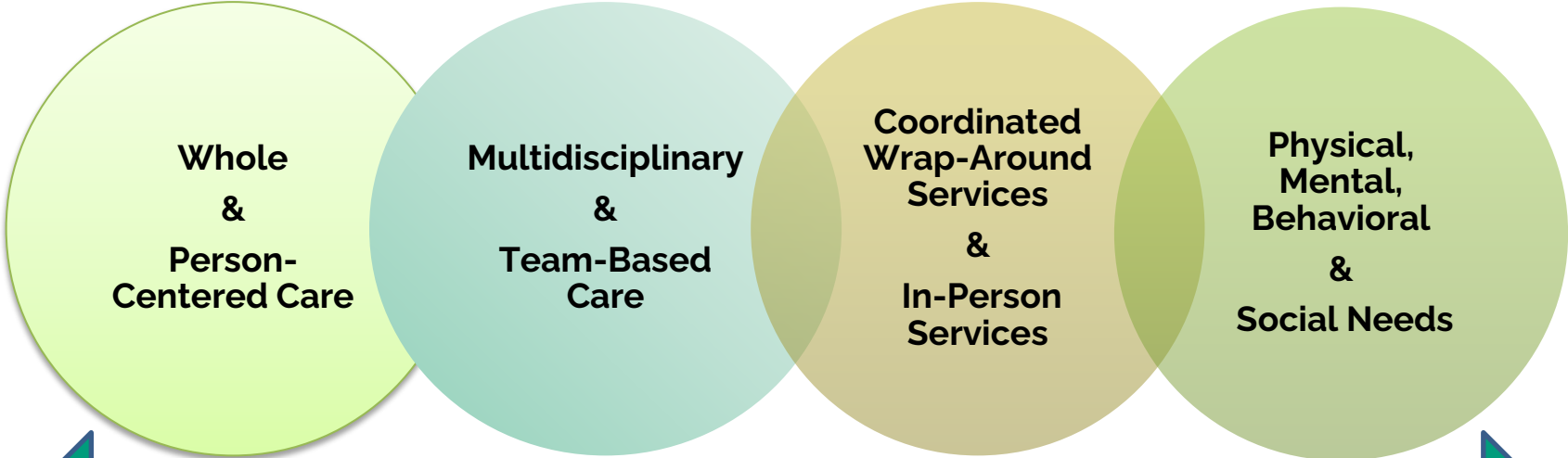
Maintain accurate documentation and keep it updated

Regular review caseload with the team, clinical consult and/or PCP

Coordinate referrals, needed resources and/or coordinate hand-offs to others on or outside of the team

Following up and transitions of care

Enhanced Care Management Framework Review



Addresses High Cost and High Need Medi-Cal Managed Care Members



ECM Core Services: which of these core service tasks are the most challenging for you to organize? (POLL)

PICK TWO

Outreach & Engagement

Comprehensive
Assessment
&
Care Plan

Enhanced Coordination
of
Care
Referrals

Health Promotion
Patient Education

Comprehensive
Transitional Care

Individual
&
Family Social Support

Coordination of
&
Referral to Community
&
Social Support Services





**STEPS TO
SUCCESS**



ECM Best Practice TIPS

**Risk Stratification:
Low, Med, High**

**Develop strong
relationships with PCP, CS,
BH, SUD providers, housing
and health plan**

**Face to face interactions
with patients on a regular
basis**

**Use electronic methods for
documentation &
communication team &
patients if possible**

**Strong emphasis & support
for adherence to
medication management**

**Comprehensive,
planned methods for
transitions of care
involving multi-
disciplinary teams**

**Recognition of the impact
of social determinants of
health & trauma
And individual strengths**

**Recognition that the
medical team must also be
included**



General Organizing Tips to Help Achieve the ECM Goals

Case Finding

- Health plan, community supports and/or referrals
- Knowing your patient case panel and load will assist you organizing

Stratify your cases by acuity:

- Low, Medium and High
- Who are: early risers, can keep appts, least organized,
- Who is erratic and will just drop-in, in crisis?
- What their temperaments and moods are like



General Organizing Tips to Help Achieve the ECM Goals

End of EACH Day Tasks: Before you go home prepping for the next day

Have a TO-DO list and prioritize each item by A, B, or C

- Review ECM schedule
 - ✓ New referral assessments
 - ✓ F/U calls
 - ✓ Meetings
 - ✓ Visits
 - ✓ Appts
 - ✓ Transitions
- Make sure you have needed documents, numbers, forms
- Try to group activities
- Prepare in advance for care team and patients encounters (instant message, huddle, through EMR?)



Have Your Tools Close at Hand



Phone numbers and email scripts

Referral Documents

Enrollment forms

Care Plans

Relapse Prevention/Maintenance Worksheet

Assessment forms

Motivational Interviewing

Patient Engagement and Self-Management tools

Communication tools

Time Management Skills 101

- Organize your desk, forms, computer, and paperwork:
 - *if you must look longer than 5 min you need to organize*
- Make a list of all your activities and the amount of time you spend on each
- Put your cell phone on vibrate (or “do not disturb”)
 - *how many times a day do you check it??*
- Set specific times of the day when you will open your cell phone and e-mails.
- Set an appointment with yourself to do the bigger tasks and break them up into smaller units
- Try setting specific times you will read emails [morning, after lunch, end day]



Time Management Skills 101

- Learn how to maximize your outlook and automate as much as possible-ask for training.
- Set up email rules in your email program,
- Set an appointment with yourself to do the bigger tasks and break them up into smaller units
- Know when it is better to pick up the phone
- Learn the tricks in your documentation software
- Create form email responses in a text file for messages that you send regularly



Time Management Skills 101

- Schedule your lunch breaks and mid-day breaks for a short walk
- Sometimes you must say no-this is my time to.....
- Prioritizing your tasks and what is most important to get done
- Minimize interruptions when possible
 - do you need a sign on your door?
- Stop avoiding tasks that you really don't want to do but must do-do the hardest 1st
 - can you delegate?
- Stop unnecessary interruptions



Day in the Life of ECM

- Check for any new referrals, patient updates or transitions
- Prepare and prioritize for the regularly scheduled weekly case reviews with team
- Participate in daily team huddles with multidisciplinary teams
- Huddle as an ECM team and review work for the day and week
- See or talk with enrolled patients for follow- up appointments/contacts
- Enter Activate Care activity note and any brief care –save longer entries for protected time
- Ad hoc meetings/communications back to the PCP and other team members as needed
- Be visible and nimble for warm-hand-offs – scripting your first touch with the patient is important!



The ECM DAY can Change on a DIME:

Daily AM Tasks

Review	your “Prep or To Do List”
Return	voice mails and emails from overnight or weekend
Huddle	with your team
Connect	with the multidisciplinary team
Check	patient referrals, authorizations etc.
Update	patients with new info (the early risers, voicemail for users)



The ECM DAY can Change on a DIME:

Daily AM Tasks

Make	f/u outreach calls to patients using the: <ul style="list-style-type: none">• <i>Low, med, high risk strategy</i>
Make	patient visits: if in-person try to group if possible
Document	as much as you can immediately <i>leither during or directly after</i>
Connect	with clients and others about updates and changes



ECM Workflow – Weekly

Pick a Day of the Week & Block Time



Review engaged patients making up your caseload



Depending on the acuity level [low, med, high] of each patient, outreach contacts are made on a regular basis



Shared care plan is created, reviewed, and updated

Problem statements

Goals

Interventions

Barriers



For ongoing care/case management and supporting the core services

Sample Typical Weekly Schedule (Morning)

	Monday	Tues	Wed	Thurs	Friday
8-9 Review to-do list	VM, emails, referrals, calls	VM, emails, referrals, calls	VM, emails, referrals, calls	VM, emails, referrals, calls	Protected time, mtgs, Training, document High risk f/u
9-10:30	Huddle, New Pt referral, Multi-check, Outreach	Huddle	Huddle	Huddle	Care plan and goal updates, Drop in time

Sample Typical Weekly Schedule - Afternoon

	Monday	Tues	Wed	Thurs	Friday
10:30-12	Care Coordination, Completion of paperwork Check emails, VMs	In-person or Site visits, Reminder calls	In-person or Site visits, Connect with Team	Document Training	Protected time, mtgs, Training, document High risk f/u
12:00-1pm 1-4pm	Lunch, In-person Visits, Document, Referrals, Outreach	Drop-in Visits, Reminder calls, Outreach	Connect with Team, Outreach	Start wrapping up week and look to Friday, planning	Care plan and goal updates, drop-in time, Outreach

**Your Day in the Life Tips:
Share In Chat what you do to get the work
done?**



Ask for Help When...



You are constantly behind



You are feeling overwhelmed



Your patients are not making any progress



You feel your load is more than you can successfully carry



Asking for help is a strength



How Can Leadership Help?

- Schedule meetings on a single day of week or month and honor the agenda
- Having scripted huddles with multidisciplinary teams are essential
- Monitoring staff case loads and acuity
- Providing tech training and solve software issues
- Be available to problem-solve
- Provide protected time for: documentation and training
- Assist in developing formal relationships and problem-solving with collaborating organizations
- Attend Case Conferences to debrief
- Reviewing documentation and institute quality improvement activities
- Insist on staff self-care measures: lunches, vacations, breaks, teambuilding activities



References

- <https://aaacn.org/>
- [California Health Care Foundation - Health Care That Works for All Californians \(chcf.org\)](https://www.californiahealthcarefoundation.org/)
- <https://www.healthmanagement.com/>
- <https://www.reliasmedia.com/Relias.com>
- <https://corporatefinanceinstitute.com/resources/careers/soft-skills/time-management-list-tips/>



Q&A Chat in!



Coming Up Next



Care Planning and SMART Goals in ECM

When: Thursday May 26, 2022

Time: 10:00 a.m.

Before You Go...
Please Complete the Evaluation of Today's Session

Please Click on the Link in the Chat Box





A DAY IN THE
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TEAM MEMBER -
TIPS FOR
ORGANIZING
YOUR WORK

