



# 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

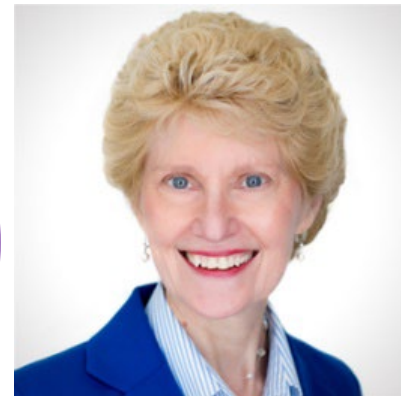
## Your Practice Coaches



**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 photograph of a Black male doctor with short, dark, curly hair, smiling while talking on a black mobile phone. He is wearing a white lab coat over a blue patterned shirt, with a stethoscope around his neck. He is sitting at a desk in an office, with a bookshelf filled with books in the background and a computer monitor visible on the right. The entire image has a light teal overlay.

**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**



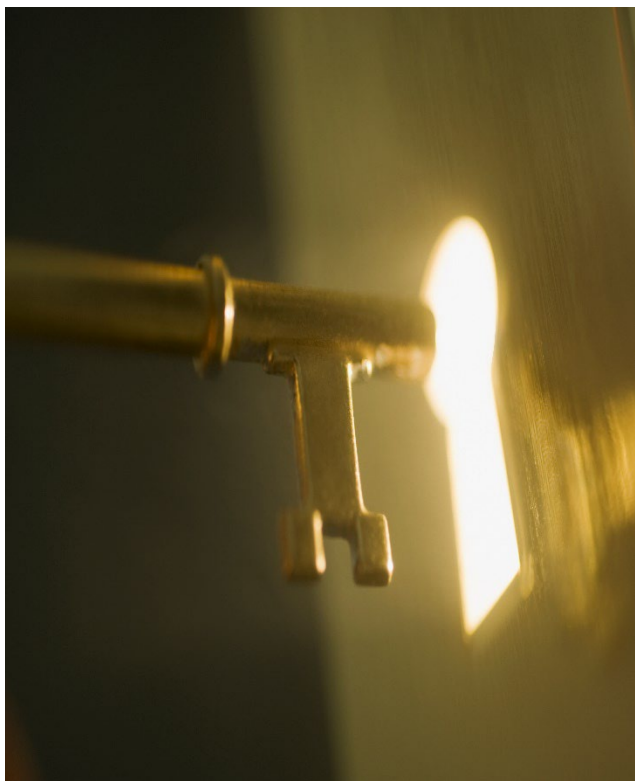


Enhance Care  
Management

## 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

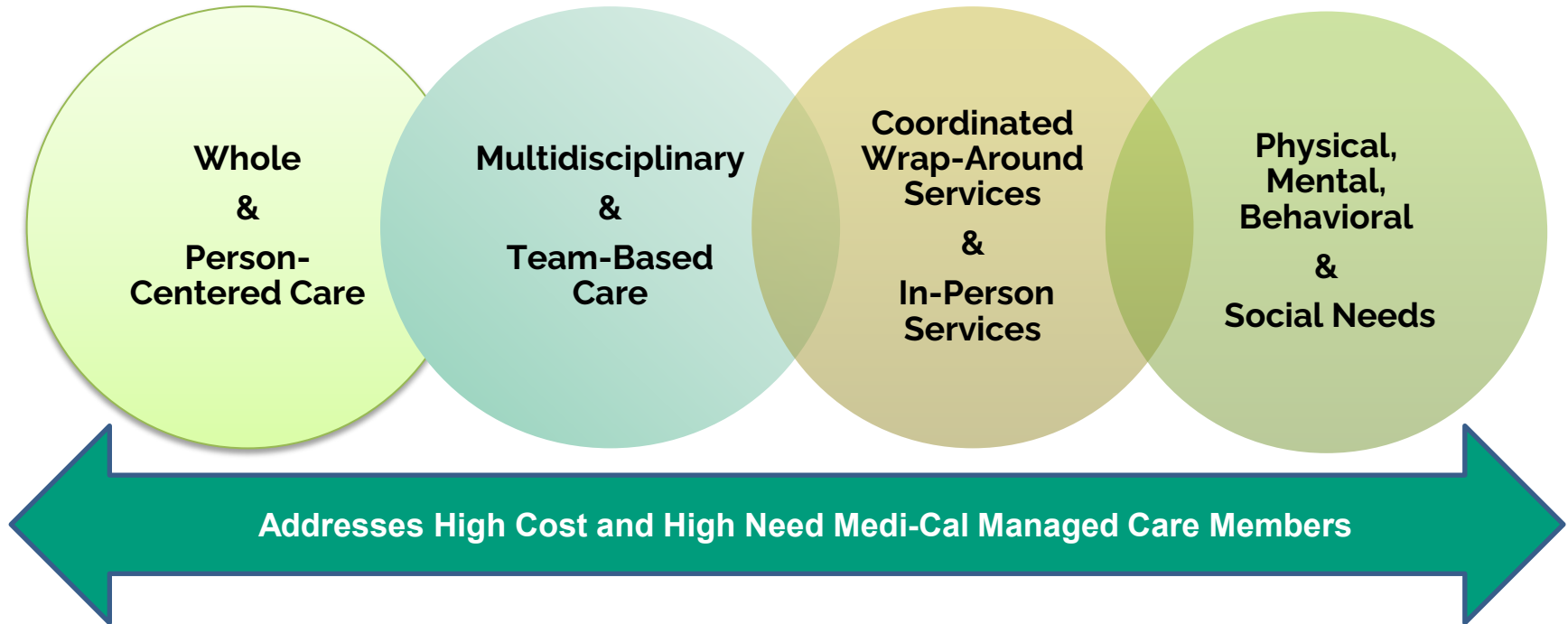
Maintain accurate documentation and keep it updated

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



# 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

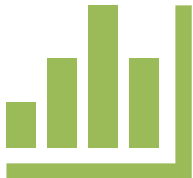
Enhanced Coordination  
of  
Care  
Referrals

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



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Phone numbers and email scripts

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Referral Documents

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Enrollment forms

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Care Plans

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Relapse Prevention/Maintenance Worksheet

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Assessment forms

---

Motivational Interviewing

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Patient Engagement and Self-Management tools

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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"><li>• <i>Low, med, high risk strategy</i></li></ul>
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://chcf.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 LIFE OF AN ECM TEAM MEMBER - TIPS FOR ORGANIZING YOUR WORK



From all of us...

THANK YOU