

Team Roles and Workflow with Patients



PSP Team Based Care Learning Series

Session: TBC Practice Approach
Tool: Team Roles and Workflow with Patients
Deliverable: Create an approach to coordinating and collaborating when working with patients

Activity Description: Team members determine key functions with patients, identify strategies to coordinate and collaborate among team members, and support consistent messaging with patients.

Tools:

This activity builds on the below tools completed as part of earlier TBC learning sessions.

- Team Mapping (Foundations)
- Team communication priorities (Interprofessional Communication)

In your practice team:

1. List all team members and their roles
2. Identify the key functions of each team member with patients (examples may include assessment, diagnosis, patient education, etc.)
3. Each team members can list some of the *messages about the team process* they may have with patients to ensure that the patient understands the approach of the whole team.
 - a. To help you focus, here are some suggested approaches:
 - i. You may choose to focus on a priority population
 - ii. Focus on areas where you have already received questions or seen confusion expressed from patients

This builds on *team communication priorities*, which is more specific to the particular health concerns of an individual patient.

e.g. “Here is your diagnosis and this is your treatment. The social worker will now talk with you about how you can manage some of the other things which have been making it hard to follow your treatment.” “I will take your blood pressure today, and then the doctor will come in to talk about how this may affect your medication. After that, I’ll come back to talk to you about some community programs that you may want to access.”

TBC Practice Approach



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Team Member/Role	Key Function with Patients	Messages about Team for Patients
Nurse	Blood pressure, education about patient self-management and community programs	“I will take your blood pressure today, and then the doctor will come in to talk about how this may affect your medication. After that, I’ll come back to talk to you about some community programs that you may want to access.”

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1. As in the table above, list all team members and their roles
2. From your Team Mapping tool, insert the areas of overlap and gaps (if there is more than one patient population, select one as an example)
3. Describe how team members will collaborate when there is an area of overlap- what is the most appropriate role for each team member, what would trigger participation of another team member, and how would this be communicated?
4. Describe how team members will coordinate when there is a gap- where/when do the gaps occur, how would the gap be filled, and who is responsible for initiating that process?

Team Member/Role	Areas of Overlap	How team members will collaborate	Gaps	How team members will coordinate
Nurse	Patient education around diabetes	GP- explains diagnosis, test results and suggested treatment Nurse-explains patient self management and access to community resources Nurse sees patient once GP has made diagnosis- GP to create flag in EMR to inform MOA to schedule patient appointment with nurse	Patient calls nurse and gives important health history- but does not schedule appointment	Nurse to initiate patient appointment and document additional history, to share with GP in team huddle

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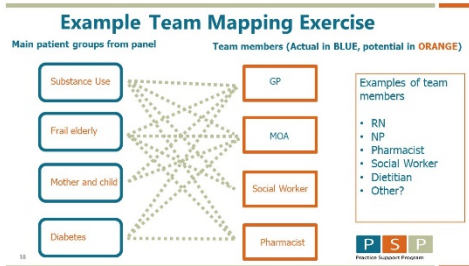
Bring these completed tools:

Team Mapping

From session: Foundations

Team Communication Priorities

From session: Interprofessional Communication



Team Communication Priorities

Team-Based Care Content

Practice Support Program

Session: Interprofessional Communication
 Resource: Team Communication Priorities
 Activity: Determine communication perspectives for each team member and create team communication priorities

Activity Description:
 Team members may be co-located or using a network model. Ask each team member to fill in this form. Once they are completed, discuss the following questions as a team.

About You	What is your role? <i>(e.g., GP, Nurse Practitioner, Social Worker, Pharmacist, etc.)</i>	What is your style? <i>(e.g., direct, informal, succinct, empathetic, funny, neutral, conversational, etc.)</i>
About Your Work	How do you document patients' medical records? <i>(e.g., private LHM, Health Authority LHM, PARS, paper file, Pharmacist, etc.)</i>	What is your care goal? <i>(e.g., making the patient comfortable, making a concise diagnosis, etc.)</i>
About Your Patients	Where do you see patients? <i>(e.g., clinic, patient home, pharmacy, hospital, etc.)</i>	What are patients' biggest concerns when they see you? <i>(e.g., health diagnosis, health treatment, mental health concerns, family situation, financial situation, etc.)</i>