

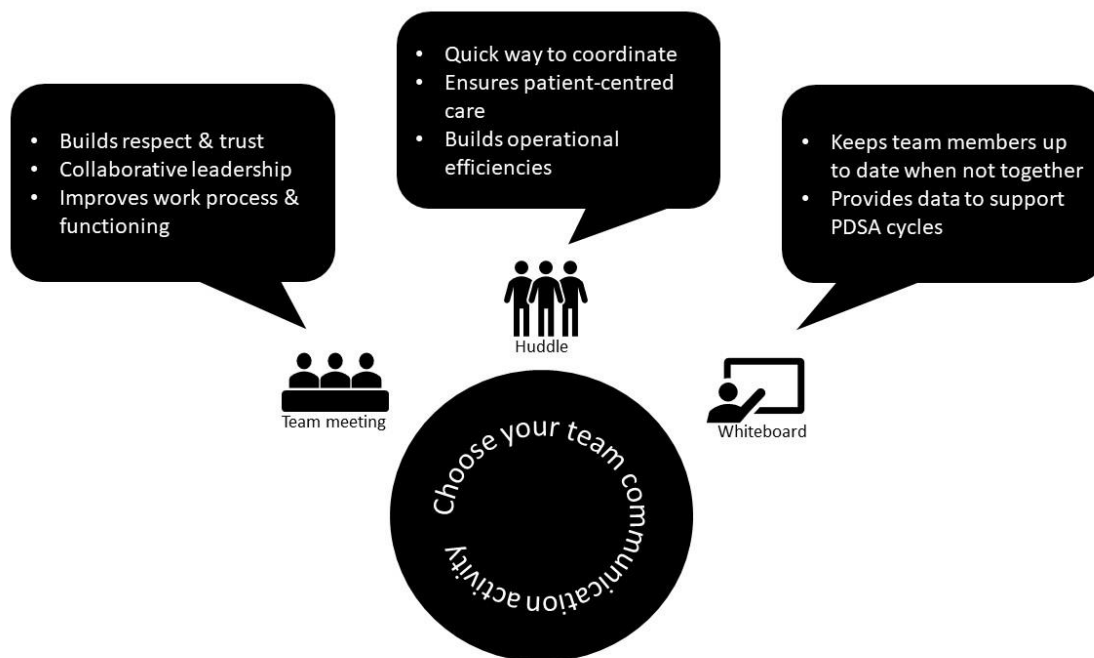
# Team Toolkit - Decision Support

## PSP Team Based Care Small Group Learning Series

Session: Team Functioning  
 Resource: Team Toolkit  
 Activity: Identify tools to support team functioning

Activity description: In this activity participants will select from some optional tools to support team functioning and consider how to implement the tool in practice.

1. Look at the tools below and see which ones may be of interest.
2. Use the table to select tools that would support your team and fit best into your practice.
3. Pick one or two, consider how to implement the tool in your practice. (sample tools provided)



# Team Toolkit - Decision Support



## PSP Team Based Care Small Group Learning Series

Session: Team Functioning  
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 Activity: Identify tools to support team functioning

	Team Meeting	Huddle	White Board	Your Ideas
<b>Why to use?</b>	Practice collaborative leadership Build trust and respect Improve work process and functioning	Prepare for the day Anticipate patient needs Get instant updates Review any improvements that need to be made (QI)	Visual displays of information that provide effective ways to make adjustments	
<b>How long does it take?</b>	1-2 hours	5-10 minutes	Ongoing updates Asynchronous (not all team members have to be together at the same time)	
<b>When to use?</b>	Weekly/monthly	Daily/Multiple times per day	Daily/weekly	
<b>When not to use</b>	For urgent issues related to patient care	To make long-term plans	For topics that require discussion/ further information	
<b>How to use?</b>	Schedule regularly Create engaging agendas	Meet briefly as a team around an EMR to quickly plan the day for	Set goals for information sharing	

# Team Toolkit - Decision Support

## PSP Team Based Care Small Group Learning Series



Practice Support Program

Session: Team Functioning  
 Resource: Team Toolkit  
 Activity: Identify tools to support team functioning

	Team Meeting	Huddle	White Board	Your Ideas
	Ensure full participation from all team members	efficient operation	Assign team members to update as needed	
<b>Benefits</b>	<p>Helps establish how appointments and referrals should be made</p> <p>Opportunity to discuss the appropriateness of referrals</p> <p>Determine how to maintain clear records</p> <p>Establish reliable methods of message leaving and retrieving</p> <p>Develop a structure for patient-centred action plans to share goals, objectives, vision and mission, and how to talk as a team about patient goals</p>	<p>Ensures that all team members are aware of patient needs, team absences and anything that can be prepared in advance of a patient visit</p> <p>Way for team members to become more aware of the clinical insights and skills brought by other team members</p>	<p>Shares information even when team members are not together</p> <p>Effective way to make adjustments in the schedule, coordinate emerging patient needs, or reassign responsibilities</p>	
<b>Constraints</b>	Requires facilitation skills	Team members must all be available at the	Requires regular updating to remain fresh	

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	Team Meeting	Huddle	White Board	Your Ideas
	Building effective meetings takes planning	same time in the practice	May need additional time to discuss changes as a result of information presented Should be kept somewhere accessible only to team members	

# Team Toolkit - Sample Meeting Agenda



## PSP Team Based Care Small Group Learning Series

1. Pick a time to meet as a team
2. Use this meeting agenda as a template

### Sample meeting agenda:

Time	Topic	Objective	Topic Lead*
9:00-9:10	Check in	Check in regarding goals for the meeting and everyone's ability to participate	Kavita Thomas
9:10-9:20	Referral process	Determine how to manage referrals for chronic care patients to specialists and social agencies	Judy Chang
9:20-9:35	Patient care plans-self-management	Determine key messages to patients regarding self-management aspects of their care plans	Will Sigh
9:35-9:50	Team messages	Create a process for sharing messages regarding medication changes for frail elderly patients	Emma Smith
9:50-10:00	Scheduling update	Provide updates on schedule changes and discuss impacts on other team members. Decide on any needed changes to workflow.	Flavio Burns

\* The Topic Lead is the person who prepares any materials in advance, structures and leads the presentation/discussion.

### Template Meeting Agenda: Design your own agenda

Time	Topic	Objective	Topic Lead*

# Team Toolkit - Sample Meeting Agenda

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1. Pick a time to meet as a team
2. Use this meeting agenda as a template

### Meeting Agenda Checklist

	Is there time for a check in at the beginning of the meeting?
	Have key roles been assigned? (Chair/Facilitator, Topic Leads, Timekeeper, Notetaker)
	Have Topic Leads been identified?
	Do those people know they are the Topic Leads?
	Do the Topic Leads know what information they need to bring to the group during the meeting?
	Are the objectives of each topic clear?
	Is the time allocated sufficient for the discussion topic?
	If there are too many items for the meeting time, have items been prioritized and some left off the agenda?
	Do all team members know the process for suggesting an agenda item?
	Has a timekeeper been assigned?
	Has someone been assigned to take notes?
	Does the notetaker know how to record action items?
	Has someone been assigned to follow up on action items?

### Meeting Process Considerations

- Have you decided how you'd like to run the meeting? ex: will someone act as chair?
- If there isn't sufficient time for certain items, have they been deferred or dealt with in another way?
- Where will action items and notes be stored and shared so that all team members can access them?
- Is there a process for reviewing notes for accuracy?

### Elements to consider for Action Planning

1. Consider how to create an **engaging agenda**
  - a. Have all team members had the opportunity to be involved?
  - b. Are the objectives clear for each topic so that the team can focus the discussion?
2. Consider **scheduling** at times where the majority of team members can attend, and consider occasional alternatives to ensure that members not available at the original meeting can participate.
3. Determine how the team will **decide collectively if this meeting process is working**, and what **improvements** could be made.

# Team Toolkit - Sample Daily Huddle Checklist

## PSP Team Based Care Small Group Learning Series

1. Pick a time to meet briefly for **5-10 minutes** around an EMR to quickly plan (or re-plan) the day for efficient operation
2. Use this checklist as a guide

Morning Huddle (before first patient of the day)	
Team Check-in	Notes
How is everyone feeling today?	
Are there any external team members here today? (e.g. PCN team, residents, etc.)	
Is anyone away? How will we manage that?	
Is anyone leaving early? How will we manage that?	
Is there anything else we should know today?	
Schedule Review	
Who is coming in today? Cancellations? Squeeze-ins?	
Is there anything the team should know about? (e.g. patient grieving, will be receiving a diagnosis, often late or no shows, etc.)	
Can we offer proactive care while they're here? (e.g. care plan update, screening due, requisitions, administer screen/self-assessment, pap prep, etc.)	
Are we doing any PDSA's today? What's the plan?	
Afternoon Huddle (before first patient of the afternoon)	
Any change in team status (e.g. leaving early, gone home sick, etc.)	
Any change to the schedule? (e.g. running late, new cancellations, squeeze-ins, etc.)	
Does anyone need help?	
PDSA update (if applicable)	
End of Day Huddle	
Brief review of incident(s)	
What went well?	
What could we have handled differently?	
Actions required?	

# Team Toolkit - Whiteboard

## PSP Team Based Care Small Group Learning Series

### Create a template whiteboard

1. What information do you want to share?
2. Why do you want to share this information?
3. Where is it located?
4. Does it contain any sensitive information? (if so, how will this be protected?)
5. Who is authorized to update it?
6. How regularly will it be updated?
7. Draw a sample whiteboard to see which elements you want to have as a template





# Team Toolkit - Whiteboard

## PSP Team Based Care Small Group Learning Series



Examples:

*Patients that keep us up at night (high needs)*

<i>Patient Name</i>	<i>Today</i>	<i>This Week</i>		<i>This Month</i>		
	<i>What</i>	<i>Who</i>	<i>What</i>	<i>Who</i>	<i>What</i>	<i>Who</i>

<i>Who is away today? (who is covering?)</i>	<i>Does anyone need special care? (who needs to be involved?)</i>	<i>Priorities</i>

# Team Toolkit - Whiteboard

## PSP Team Based Care Small Group Learning Series



<i>Issues prioritized by team</i>	<i>New Improvement Opportunities</i>		<i>Work in Progress</i>	<i>Ideas Implemented</i>
	<i>Implement Possible</i>	<i>Challenge Kibosh</i>	<i>Difficult problems</i>	