ECHO-Care Transitions Program Toolkit

Appendix



Appendix Contents

- 1. Program Publications
- 2. SNF welcome & expectation letter
- 3. SNF logistics survey sample
- 4. ECHO-CT orientation slides
- 5. Intake form sample
- 6. Case detail sample
- 7. Facilitator feedback example
- 8. SNF satisfaction survey example
- 9. Education session slides

For more information & to view a recorded ECHO conversation, please visit our website at: https://www.bidmc.org/research/research-by-department/medicine/gerontology/echo-care

Program Publications:

- Mariana Gonzalez, Lauren Junge-Maughan, Lewis Lipsitz, & Amber Moore (2021). ECHO-CT: An Interdisciplinary Videoconference Model for Identifying Post-Discharge Transition of Care Events. Journal of Hospital Medicine. DOI: 10.12788/jhm.3523 Link to Article Here
- Moore, A. B., & Lipsitz, L. A. (2020). ECHO's ECHO: Overcoming modern healthcare operational challenges with provider-to-provider video communication. Journal of Hospital Administration, 9(2), 48. doi:10.5430/jha.v9n2p4 Link to Article Here
- Junge-Maughan L, Moore A, Lipsitz L. (2020) Key strategies for improving transitions of care collaboration: lessons from the ECHO-care transitions program. J Interprof Care. Aug 18 1-4. PMID: 32811238.

 Link to Article Here
- Farris G, Sircar M, Bortinger J, Moore A, Krupp JE, Marshall J, Abrams A, Lipsitz L, Mattison M.(2017) Extension for Community Healthcare Outcomes-Care Transitions: Enhancing Geriatric Care Transitions Through a Multidisciplinary Videoconference. J Am Geriatr Soc. Mar 65(3):598-602. PMID: 28032896.

 Link to Article Here
- Moore, A., Krupp, J., Dufour, A., Sircar, M., Travison, T., Abrams, A., Farris, G., Mattison, M. and Lipsitz, L., (2017). Improving Transitions to Postacute Care for Elderly Patients Using a Novel Video-Conferencing Program: ECHO-Care Transitions. The American Journal of Medicine, 130(10), pp.1199-1204.

 Link to Article Here

ECHO-Care Transitions
Beth Israel Deaconess Medical Center
330 Brookline Ave, Boston, MA 02215

Welcome! We are thrilled that you are interested in participating in the ECHO-CT program and look forward to finding ways to partner with you in improving communication and transitions of care for patients. We're excited to be able to offer this program to you free of charge through a grant from the Agency for Healthcare Research and Quality. Below, you will find an outline of program expectations. If you have any questions about the list below, please feel free to reach out. Thank you so much for your interest.

All the Best,

Dr. Lipsitz and Dr. Moore

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Vice President for Academic Medicine and

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Program Expectations for SNF Teams:

- Attend in-person ECHO-CT kick-off meeting on (date)
- Regularly attend weekly video conferences
- Participate in online continuing education sessions which will occur once every
 6 months
- Agree to complete staff satisfaction survey every 6 months during program participation

SNF Logistics Survey Questions Sample

- 1. Choose your SNF from the list below (list SNFs)
- 2. We will be having our ECHO-CT kick-off conference on "insert date". We ask that each SNF sends one administrative lead and one clinical lead to the conference. Please list the names and emails for those two individuals who are planning to attend:

(text box to list names & emails)

3. The weekly ECHO sessions will be (tentatively) beginning the (insert start date for sessions). In order to prepare for the first session, we want to get a sense of who will be participating on a weekly basis from your site. We recommend choosing individuals who have first hand knowledge of the patient's transition and clinical status (such as Nurse Floor manager, bedside Nurse, NP, MD). Please list the name(s) and email(s) below. Please Note: We understand that this is subject to change.

(text box to list names & emails)

4. The ECHO sessions will be every (insert day of week you hold sessions). Each SNF will be assigned a 15 minute time slot in which to discuss their patients for the week. For the list of times below, please choose ALL times that work for your team. This will help the team to put together a schedule that will work well for everyone.

(list session timeslots)

5. Each SNF will need to designate a point person(s) who will handle weekly pre-ECHO session logistics. This includes verifying the list of patients to be discussed and sending the patient's medication list to the Program Manager. Please list the name and email of this person(s) below.

(text box to list name & email)

6. Please list the name/email of the person from your site who can be contacted to discuss IT related topics. (text box to list name & email)



Please sign-in at the registration area and grab some breakfast. We'll be starting shortly.





Today's Agenda



Meet the Team:





































Participating Skilled Nursing Facilities





Introductions

We're going to go around the room and please let us know:

- Name
- Role
- · What facility you are from

We will also have a poll question up. Please $\underline{\text{text}}$ in your responses as we do introductions.

 $\underline{\text{https://www.polleverywhere.com/free_text_polls/vvJE0crt1nGWP1amZw01Z?preview=true}$

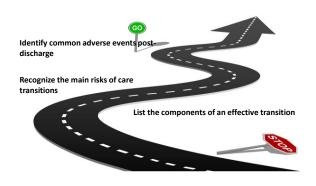




Conflict of Interest Disclosure

• I have no financial relationships with a commercial entity producing healthcare-related products and/or services.





Our patient: Ms. D

- 71 y/o woman who lives at home with her husband
- Originally from Ireland, came to the US at age 15
- Has been married > 50 years
- She has 4 children, 7 grandchildren, 1 great-grandchild

• Severe confusion, fall, decreased urine output over 2-3 days

• Diagnosed with acute kidney failure, hyperglycemia, severe confusion

• Recently started on NSAIDs for shoulder bursitis

• Brought to the ED for evaluation

• Admitted to the Intensive Care Unit

- Former secretary
- Uses a walker and a right leg prosthesis at home
- Husband helps with many ADLs



Our patient: Ms. D

- Past Medical History
 - Diabetes mellitus
 - HTN
 - Orthostatic hypotension
 - Peripheral neuropathy
 - PVD s/p right BKA
 - Chronic back pain
- Takes 25 different medications
 - daily
 - Opiates
 - Anti-HTN meds
 - Insulin pump
 - Anxiolytics
 - Antiplatelets



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- Mental status slowly clears
- · Kidney function improves
- Course complicated by severe high blood pressure
- Started on new anti-hypertensive agents
- Methadone started for pain control
- Insulin pump discontinued, long-acting insulin started
- · Discharged to a skilled nursing facility





- Develops acute kidney failure again
- Changes to blood pressure medication regimen due to side effect
- Diagnosed with urinary tract infection, started on antibiotics
- Pain regimen changed
- Discharged to home on a Saturday





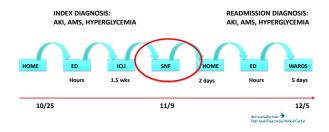
- Decreased urine output
- Two falls at home
- Slightly confused
- Noted by VNA to have "many many old meds around the house"
- Presents to the ED
- Found to be in acute kidney failure & hyperglycemic
- Admitted to Medicine



- Diagnosed with urinary retention again
- She was taking old oxycodone and morphine that she had at home
- She had re-initiated her insulin pump on her own
- Urinary retention resolves with foley placement
- Patient stabilized on long-acting insulin, methadone
- Discharged home with VNA



SIX MAJOR TRANSITIONS OVER SIX WEEKS



How do we define Transitions in Care?



"Set of actions designed to ensure the coordination and continuity of health care as patients transfer between different locations or different levels of care within the same location"

> Coleman EA. Falling Through the Cracks: Challenges and Opportunities for Improving fransitional Care for Persons with Continuous Complex Care Needs. J Am Geriatr Soc 1003;51(4):549-555.

Prevalence of Post-hospital Transitions

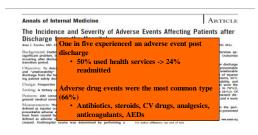
- Hospitalized Medicare beneficiaries
 - 73% -> HOME
 - 17% -> SNF or Acute Rehab
- $-\,$ 10% -> Different hospital or within the same hospital
- Number of transfers within 30 days
 - 61% single transfer
 - 18% two transfer
 - 8.5% three transfers
 - 4.3% four or more transfers

Coleman E, Min S, Chomiak A, Kramer A. Posthospital Care Transitions: Patterns, Complications, and Risk

Why is this important?

- Vulnerable time for patients
 - Shorter length of stay
 - Possible worsening of functional impairments
 - Changes in treatment regimen
 - Discontinuities during their transitions

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Medical Errors Related to Discontinuity of Care from an Inpatient to an Outpatient Setting

Carlton Moore, MD, Juan Wisnivesky, MD, Stephen Williams, MD, Thomas McGinn, MD J GEN INTERN MED 2003;

MAIN RESULTS: Forty-nine percent of patients experienced at least 1 medical error. Patients with a work-up error were 6.2 times (95%comfidence interval [95% CI], 1.3 to 30.3) more likely to be rehospitalized within 3 months after the first association between medication continuity errors (odds ratio (ORI, 2.5: 65%CI, 0.7 to 8.8) and test follow-up errors (OR, 2.4; 95%CI, 0.3 to 17.1) with rehospitalizations.

CONCLUSION: We conclude that the prevalence of medical errors related to the discontinuity of care from the inpatient to the outpatient setting is high and may be associated with an increased risk of rehospitalization.



Risks of Transitions

- · Adverse drug events
- · Missed results from pending tests
- · Lack of appropriate follow-up

ORIGINAL ARTICLES

Adverse Drug Events Occurring Following Hospital Discharge

Alan J. Foster, MD. FRCPC, MSc.¹ Harvey J. Murft, MD.² Josh F. Peterson, MD.² Tejal K. Gandhi, MD. MPH.³ David W. Bates, MD. MSc.³ Telial K. Gandhi, MD. MPH.³ David W. Bates, MD. MSc.³ Telial K. Wester of Characteritemal Mediction and Offowa levelth Research Institute, Wiewelly of Offowa, Offowa, Chaise, Canadas "Dividenced Hedicine, Varidettil Urivertity, Nashville, IN, USA "Dividion of General Medicine, Bigham and Women's Hospital, Harva Microsoft School, Distan, MA, USA."

87% of ADEs associated with certain meds

Almost all cases associated with new med or dose change

Risk of ADE increased with number of medications prescribed



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Discharge medication list

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Discharge medication list

charge Medications:

Calcitrate-Vitamin D (calcium citrate-vitamin D3) 315-250

Calcitrate-Vitamin D (calcium citrate-vitamin D3) 315-250

Fish Oil (Gnega 3) 1000 mg PD BID

Fish Oil (Gnega 3) 1000 mg PD BID

Fish Oil (Gnega 3) 1000 mg PD BID

Calcitric 0 0.25 mcg PD DAILY

Closidoprat 15 mg PD DAILY

Closidoprate Sodium 100 mg PD BID

Docusate Sodium 100 mg PD BID

Docusate Sodium 100 mg PD BID

Clucagon 1 mg IM PRH Low blood sugar

Levothyroxine Bodium 88 mcg PD DAILY

Lisanoprat 20 mg PD DAILY

Senna 2 TAB PD DAILY PINNI

Comparable 20 mg PD DAILY

Amiceline 10 mg PD DAILY

Amiceline 10 mg PD THE

Clastic 10 mg PD THE

Lidecaine 50 Packs 2 PTCH TD DAILY

Michadone 12.5 mg PD DAILY

Michadone
                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              Bethtrad Lakey Hoalth >
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What happened to our patient after discharge from the SNF?

- · Discharged on a Saturday
- Given new script for Methadone
- Pharmacy did not have the medication
- Began taking opiates that she had at home (oxycodone, morphine)
- Developed urinary retention, subsequent AKI, and altered mental

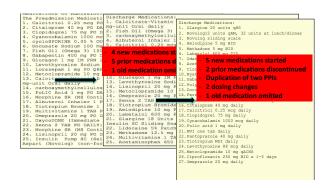


Frequency and Predictors of Prescription-Related Issues after Hospital Discharge

Smill Kripalani, se, see' BACKGROUND: In the period immediately following hospital discharge, patients with the set of the september of discharge and the set of the september of the set o additional assistance prior to discharge and receive a follow-up phone call to assess if discharge prescriptions have been filled. *Journal of Hospital Medicine* 2008;3:12–19. © 2008 Society of Hospital Medicine.

Division of General Medicine, Department of In-ternal Medicine, University of Colorado School of Madicine, Deswer Colorado

Prospirate Meeticative precipitate death bases, most often not filling duchange prescriptions. In mul-tivariable analyses, prescription-related bases were more common among adults any 58-46 women; patients with Medicate IMMC coverage, Medicated on in insurance solids with higher severity of filmess urings and partients prescribed to are consistent of the control of the control





Original Study

Medication Reconciliation in Continuum of Care Transitions: A Moving Target Liron Danay Sinvani MD**, Judith Beizer PharmD*¹⁰, Meredith Akerman MS*, Renee Pekmeraris Pph. S**-de**, Christian Nouyan MA*, Larry Lustky PhD*, Charles Cal RN, MS, MBA*, Yosef Dlugacz PhD***, Kevin Maskk PhD*, Gisele Wolf-Klein MD****. JAMDA 2013;14:668-672

Number of meds per patient increased with each transition: (6.5 -> 10.7 -> 12.6)

Average of 7.5 medication changes per patient per transition



Medication discrepancies across multiple care transitions: A retrospective longitudinal cohort study in Italy

Marco Bonaudo¹*, Maria Martorana¹, Valerio Dimonte¹, Alessandra D'Alfonso², Giulio Fornero³, Gianfranco Politano⁴, Maria Michela Gianino¹

Results

Of 366 included patients, 25.68% had at least one discrepancy. The most frequent type of discrepancy was from medication omission (N = 74; 71.15%). Only discharge from a long-stay care setting (T4) was significantly associated with the onset of discrepancies (p = 0.045). When considering a lack of adequate documentation, not as missing data but as a discrepancy. 43.72% of patients had at least one discrepancy.



Risks of Transitions

- · Adverse drug events
- Missed results from pending tests
- · Lack of appropriate follow-up



IMPROVING PATIENT CARE

Patient Safety Concerns Arising from Test Results That Return after Hospital Discharge

Christopher L. Roy, MD; Eric G. Poon, MD, MPH; Andrew S. Karson, MD, MPH; Zahra Ladak-Merchant, BDS, MPH; Robin E. Johnson, B. Saverio M. Maviglia, MD, MSc; and Tejal K. Gandhi, MD, MPH

pending when patients are discharged from the hosp an important patient-safety problem. Few data are the epidemiology of test results pending at discharg sician awareness of these results.

Objective: To determine the prevalence, characteristics, and physician awareness of potentially actionable laboratory and radiopole test results returning after hospital discharge.

Setting: Two tertiary care academic hospita

Patients: 2644 consecutive patients discharged from hospitalist services from February to June 2004.

MCALIFERICIES: The main outcomes were the prevalence and householdered operatually actionable test results returning after hospital discharge, awareness of these results by impatient and primary care physicians, and satisfaction of impatient physicians with current systems for follow-up on test results. The author prospectively collected data not set results pending at the time of discharge and, as results returned after discharge, surveyed hosters are supported to the properties of the properties of the sensities that were potentially actionable according to a physiciansensitie that were potentially actionable according to a physiciandischarge. Of these results, 191 (9.4% [95% CI, 8.0% were potentially actionable. Surveys were sent regard-results in the surveys with responses, physicians had been un-

aware of 65 (61.6% [Cl. 51.3% to 70.9%)); of these 65, they agreed with physician-reviewers that 24 (37.1% [Cl. 25.7% to 50.2%)) were actionable and 8 (12.6% [Cl. 6.4% to 23.3%)) their equired urgent action. Inpatient physicians were dissatisfied their systems for following up on test results returning after disharge.

Limitations: The authors were unable to determine whether physicians' lack of awareness of test results returning after discharge was associated with adverse outcomes.

DICLUSIONS: Many patients are discharged from hospitals with t results still pending, and physicians are often unaware of tentially actionable test results returning after discharge. Further kt is needed to design better follow-up systems for test results uming after hospital discharge.

Ann Intern Med. 2005;143:121-128.

www.annals.c



Only 11% of these tests were documented in the discharge

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Risks of Transitions

- Adverse drug events
- Missed results from pending tests
- Lack of appropriate follow-up



ORIGINAL INVESTIGATION

Tying Up Loose Ends

Discharging Patients With Unresolved Medical Issues

Curlon More, MD, Thomas McGinn, MD, NPH; Ethan Halm, MD, MPH
Greater than 1 in 40 discharged patients had recommendations for an outpatient work-ups

Background: 1
36% of these work-ups were not completed
beams requiring or 5 Curimmaries with documentation of recommended
work-up here work-up being completed
overlying or 5 Curimmaries with documentation of recommended
work-up increased likelihood of work-up being completed
increased time to initial post of wish with PCP decreased
likelihood of work-up being completed
ilkelihood of work-up being completed
and December 31
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Results: Of 693 hospital discharges, 191 discharged patients (27,6%) had 240 outpatient workups recommended by their hospital physicians. The types of workups were diagnostic procedures (47,9%), subspecialty referrals (33–4%), and laboratory tests (16,7%). The most tient workups after hospital discharge is common. P many care physicians' access to discharge summaries doe menting the recommended workup is associated wi better completion of recommendations. Future r search should focus on interventions to improve the qui ity and dissemination of discharge information to pr many care physicians.

Arch Intern Med. 2007;167:1305-1311

Back to our patient: what is her understanding & perspective?

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Discharge instructions from the ICU:

You were admitted on 10/30 for altered mental status, high blood sugars, and high blood pressures. Your confusion and high blood pressures. Your confusion and high blood pressures are supported to several medications to manage your put on several medications to manage your blood pressure and at discharge it is moderately well controlled. You should follow up with your primary care provider for further monitoring and treatment.

You came to the hospital with high blood sugars. You were taken off your insulin pump and were put on long acting and short acting insulin. Please continue this insulin regimen until you see your endocrinologist.

in addition, you were on many pain medications at home, which likely contributed medications at home, which likely contributed your home medications and put on a long-acting opioid medication, methadone, with plans to slowly titrate it down. At discharge please see your primary care physician for further management of your pain.

"I felt the doctors and the nurses did a good job taking care of me. I didn't know I had problems with my blood pressure. I remember I had a problem with my kidneys, but I don't know what caused it. At the rehab, I had some physical therapy. I don't think I had any problems while I was there. I didn't know I had a urine infection or problems with my kidneys again."



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"I couldn't get methadone when I went home. I had so much pain so I took oxycodone and morphine that I had at home. I didn't know what else to do. I didn't know the morphine was causing the problems with my kidneys. But I know now not to take this anymore."

"I feel I have a good system with my medications. I divide my morning medications, evening medications, and once-a-day medications in different plastic bags. I put away old medications in the back of the bathroom shelf."



Original Article

Patients' Understanding of Their Treatment Plans and Diagnosis at Discharge

Amgad N. Makayus, MD*, Eli A. Friedman, MD* ≜. as Mayo Clin Proc. 2005 Aug;80(8):991-4.

RESULTS

ACM 27 salems surveyed, 4 were excluded, Of the remaining 43 patients, 12 (27.9%) were able to list all their medications, in (4.0%) were able to list all their medications, in (4.0%) were able to state the common side effect(s) of all their medications, and 18 (41.9%) were able to state their diagnosis or diagnoses. The mean number of medications prescribed at distincturage was 3.9%.

CONCLUSIONS

Less than half of our study patients were able to list their diagnoses, the name(s) of their medication(s), their purpose, or the major side effects). Locking waveness of these factors affects a patient ability to comply billy with discharge treatment plans. Whether lack of communication between physician and patient is actually the cause of patient unawareness of discharge instructions or if this even affects patient outcome requires further study.



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