

Team Roles and Responsibilities

Module 10

Today's Presenters



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Program Manager for MI-CCSI's involvement in the Michigan Overdose Data to Action (MODA) program, content expert, faculty member, and participant in practice transformation initiatives. Dr. Nolan has experience in community, specialty, and ambulatory pharmacy.



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Trainer for MI-CCSI with care management experience in the primary care, behavioral health, and payer settings. She has trained hundreds of clinicians on the care management process and motivational interviewing. Her love of and partnership with patients, families and clinicians is rooted in early work as a psychiatric nurse and the deep conviction that care management is a privilege and calling.

Disclosure

MI-CCSI, or the presenter, does not have any financial interest, relationships, or other potential conflicts, with respect to the material which will be covered in this presentation.

Patient-Centered Treatment for Substance Use Disorder in Primary Care

Clinical

Module	Title
1	Navigating Buprenorphine Prescribing for the Primary Care Physician
3	Buprenorphine Medical Management: Monitoring the Patient
5	Challenging Clinical Scenarios in MOUD: Early Refills and Lost or Stolen Medication
7	Complex Cases in Buprenorphine Treatment, Part 1
9	Complex Cases in Buprenorphine Treatment, Part 2
11	Pain and Addiction

Operational

Module	Title
2	Substance Use Disorder and Patient Identification
4	OBAT Eligibility, Intake and Assessment
6	Patient Support for Induction and Maintenance
8	Operationalizing Team Meetings, Systematic Case Review, & Documentation
10	Team Roles and Responsibilities
12	Supporting the Patient Beyond Buprenorphine

Action Period Assignment





From Module 8

- **Identify the communication strategy, documentation tools, and billing strategies your team will utilize.**
- **Define how team meetings will be conducted within your practice and schedule them on the calendar.**
 - **What is the purpose?**
 - **Who will be involved?**
 - **How often will meetings occur?**
 - **Where will meetings occur?**



OBJECTIVES

At the conclusion of this presentation, the participant will be able to:

-  **Recognize key aspects of team-based care.**
-  **Understand the importance of defining team roles and responsibilities to support the prescribing provider.**
-  **List examples of roles and responsibilities of OBAT team members.**
-  **Develop workflows to support specific components of the OBAT model.**

AGENDA

1	Review
2	Team-Based Care Approach
3	Importance of a Roles and Responsibilities
4	Examples of Roles and Responsibilities
5	Creating Workflows
6	Practice Interviews



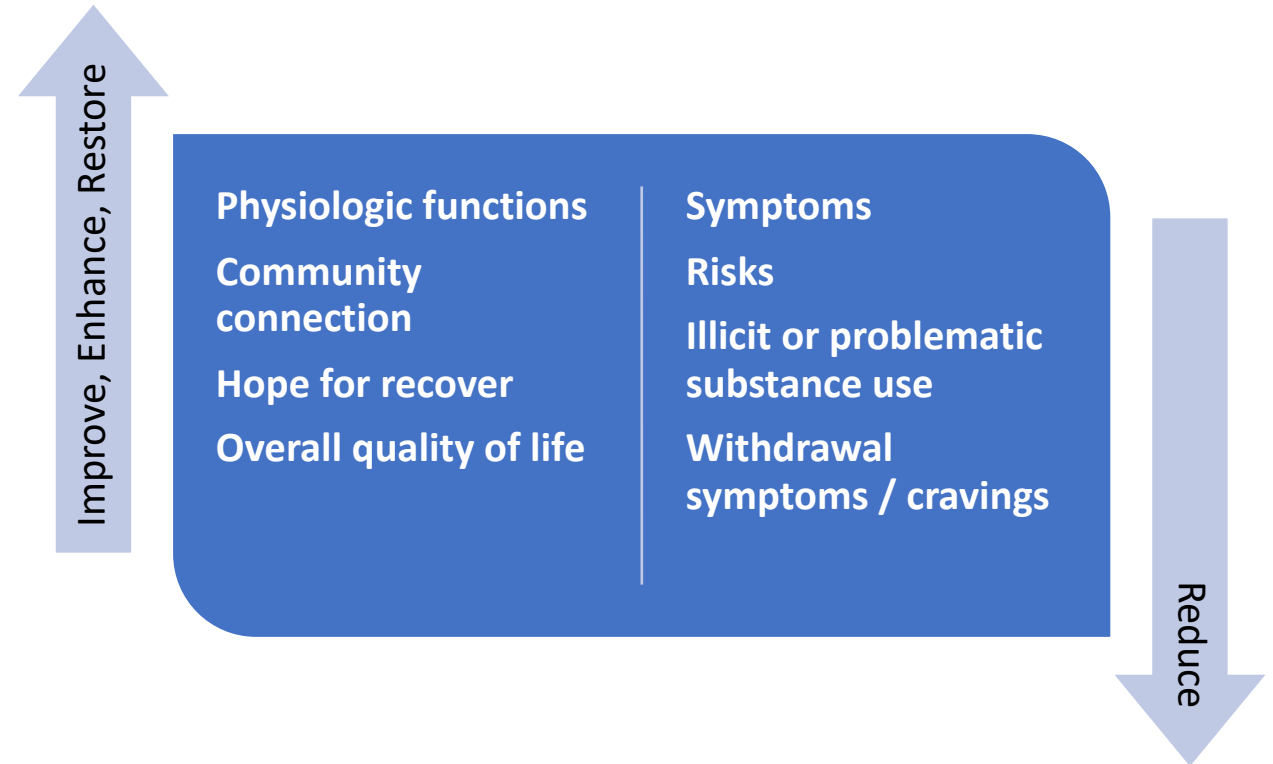
REVIEW

Previous Modules

Office-Based Addiction Treatment (OBAT)

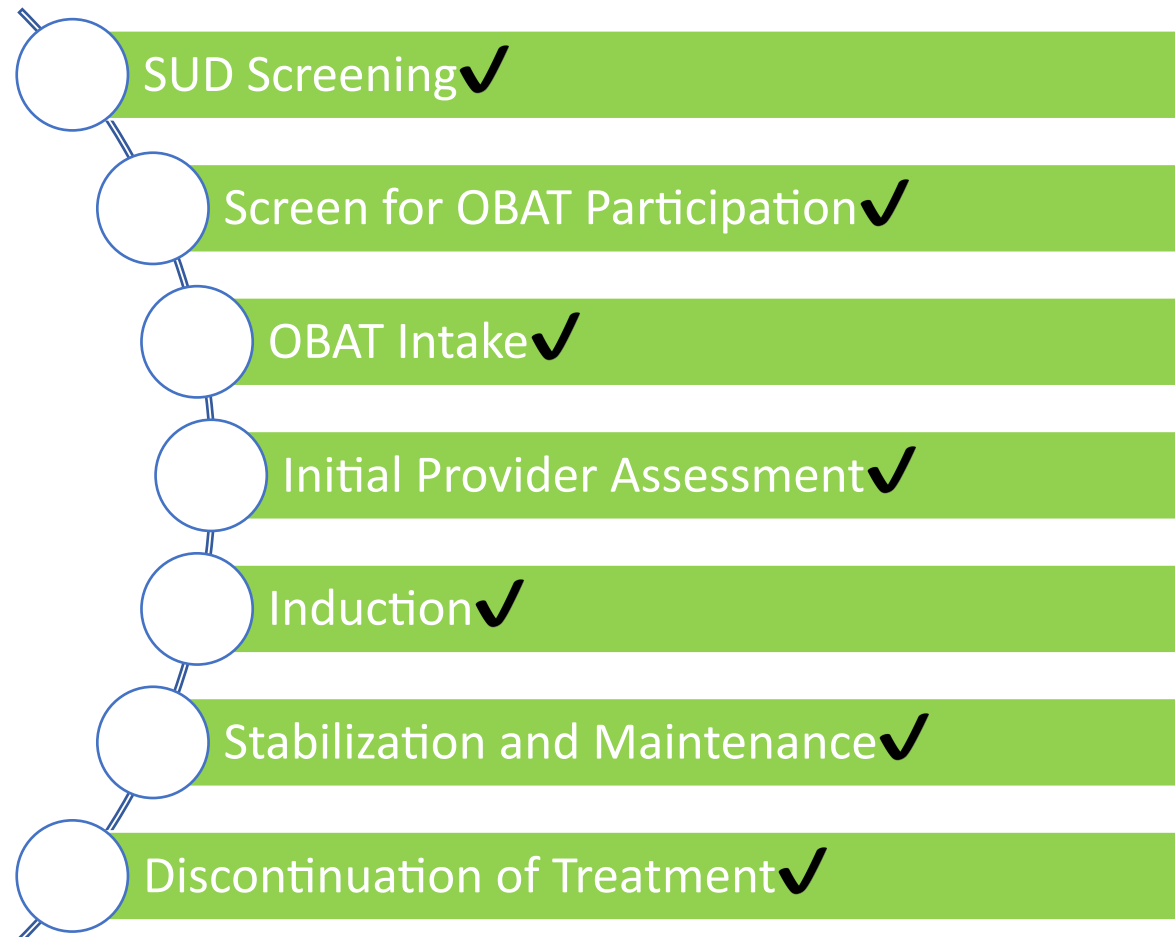
Overview

- Patient-focused
- Evidence-based
- Primary care / community model
- Offer of medication and psychosocial therapies as a component of a comprehensive care plan
- Select patients identified via screening may be candidates for OBAT



OBAT

Program Components



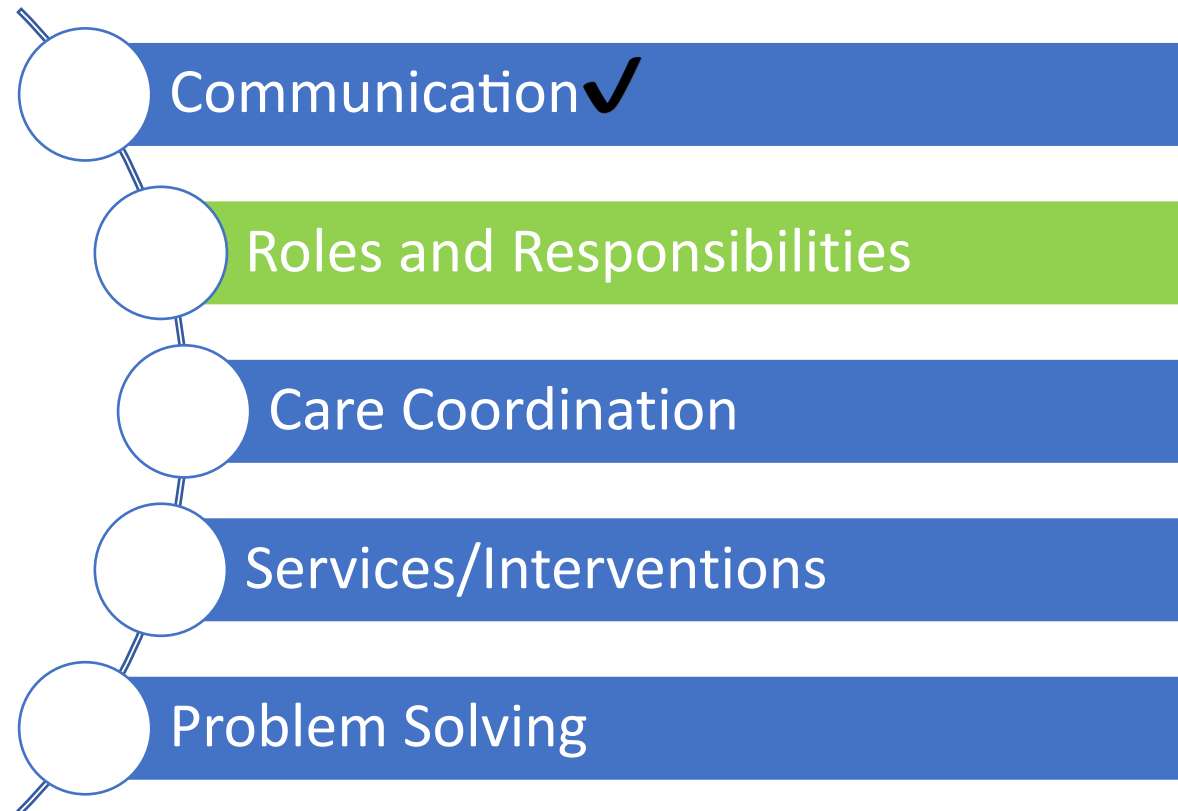
Team-Based Approaches

Complementing OBAT



Team-Based Approaches

Complementing OBAT





Team-Based Care Approach

Team-Based Care

An Overview

National Academy of Medicine definition:

"...the provision of health services to individuals, families, and/or their communities by at least two health providers who work collaboratively with patients and their caregivers—to the extent preferred by each patient - to accomplish shared goals within and across settings to achieve coordinated, high-quality care."

Key aspects:

- ≥ 2 health care providers working together to provide care for a panel of patients
- Shared goal setting in collaboration with patient and caregiver
- Coordinated high-quality care

Creating Patient-Centered Team-Based Primary Care. (2016). AHRQ, U.S. DHHS.
<https://pcmh.ahrq.gov/page/creating-patient-centered-team-based-primary-care>

Team-Based Care

Example: Team Roles

Primary Care Provider	Registered Nurse Care Manager	Social Worker / Behavioral Health Specialist	Clinical Pharmacist	Community Health Worker	Clerical	Medical Assistant
<ul style="list-style-type: none"> • Annual physical • Orders for preventative care • Diagnosis • Discussion of treatment options • Management of acute and chronic conditions • Coordination of care and care team • Referrals to specialists • On call 	<ul style="list-style-type: none"> • Care management for high-risk patients • Chronic illness monitoring – response to treatment and titrating treatment according to delegated order sets 	<ul style="list-style-type: none"> • Provide behavioral health services in the practice or by referral • Response to immediate behavioral health needs 	<ul style="list-style-type: none"> • Medication review • Review prescribing practices • Assist with non-adherence, side effects, cost concerns, medication questions / challenges • Titrate medications under standing orders • Manage chronic conditions under Collaborative Practice Agreement 	<ul style="list-style-type: none"> • Self-management support • Coordinate care by helping patients navigate the healthcare system and access community services 	<ul style="list-style-type: none"> • Outreach to overdue patients • Referral appointments, pre-authorization orders, follow-up reports 	<ul style="list-style-type: none"> • Collaborate with provider to manage panel • Preventative service outreach • Self-management coaching or follow-up phone calls • Scrub charts • Provide pre-visit screenings • Review medication list

Massachusetts Nurse Care Model of Office Based Addiction Treatment: Clinical Guidelines. (2021). Office Based Addiction Treatment Training and Technical Assistance. Boston Medical Center.
https://www.bmcobatt.org/resources/index.php?filename=22_2021_Clinical_Guidelines_06.22.21.FINAL.pdf



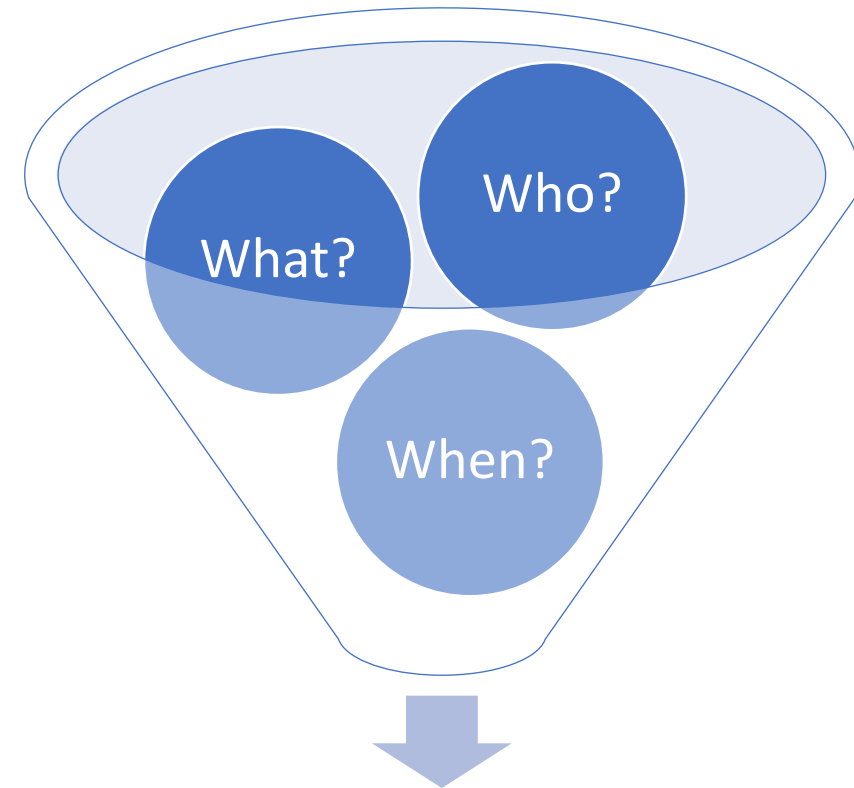
Importance of Defining Roles and Responsibilities

The “Why”

Defining Roles and Responsibilities

The “Why”

- Screening tool for patient identification
- Criteria for screening
- Documentation and billing standards
- OBAT eligibility determination
- Program intake
- Induction process
- Relapse prevention planning
- Follow-up and monitoring
- Team meeting logistics



Team Roles and Responsibilities

Defining Roles and Responsibilities

Task List Tool

Task	Front Desk	MA	Provider	Office Nurse	RN Care Manager	BH Specialist	Pharmacist	Psychologist	Care Coordinator	Biller	Other (List Role)
Gives the patient a screening tool to fill out for SUD											
Provides the patient with the purpose of the SUD screening tool											
Provide SUD counseling for patients than score low risk (provide affirmation and education)											
Provide SUD counseling for patients than score at risk (provide brief intervention)											

Massachusetts Nurse Care Model of Office Based Addiction Treatment: Clinical Guidelines. (2021). Office Based Addiction Treatment Training and Technical Assistance. Boston Medical Center.
https://www.bmcobatt.org/resources/index.php?filename=22_2021_Clinical_Guidelines_06.22.21.FINAL.pdf



Example Roles and Responsibilities

Care Team Members

Examples from OBAT Manual

- All teams are different
- Patient-centered care is the goal
- Role clarity provides comfort and confidence
 - Care team members
 - Provider



Nurse Care Manager

Example Roles and Responsibilities (OBAT Manual)

- Initial intake and assessment
- Support through medication initiation, stabilization, and maintenance phases
- Documentation
- Care coordination
 - Social workers/counselors, psychiatrists, pharmacies, primary care providers, recovery support persons, specialty care providers

Medical Assistants

Example Roles and Responsibilities (OBAT Manual)

- Collection and preparation of laboratory specimens
- Record vital signs
- Rooming
- Documentation
- Greeting, scheduling, telephone communication

Recovery Coaches / Peer Supports

Example Roles and Responsibilities (OBAT Manual)

- Proactive outreach to patients not yet ready to engage in formal treatment
- Wellness planning
- Service navigation
- Sharing of and linkage to resources
- Community outreach and advocacy
- Social and emotional support

Behavioral Health Partners

Example Roles and Responsibilities (OBAT Manual)

- Coordination and delivery of behavioral health treatment
 - Identifying and maintaining motivation for recovery
 - Developing insight into triggers for recurrent use
 - Creating safe and effective coping strategies
 - Building community connection
- Use of specific counseling techniques
 - Cognitive behavioral therapy
 - Motivational interviewing

Support Staff

Example Roles and Responsibilities (OBAT Manual)

- Greeting patients
- Scheduling appointments
- Administrative tasks
- Overdose identification and response
- Telephone communications



Creating Workflows

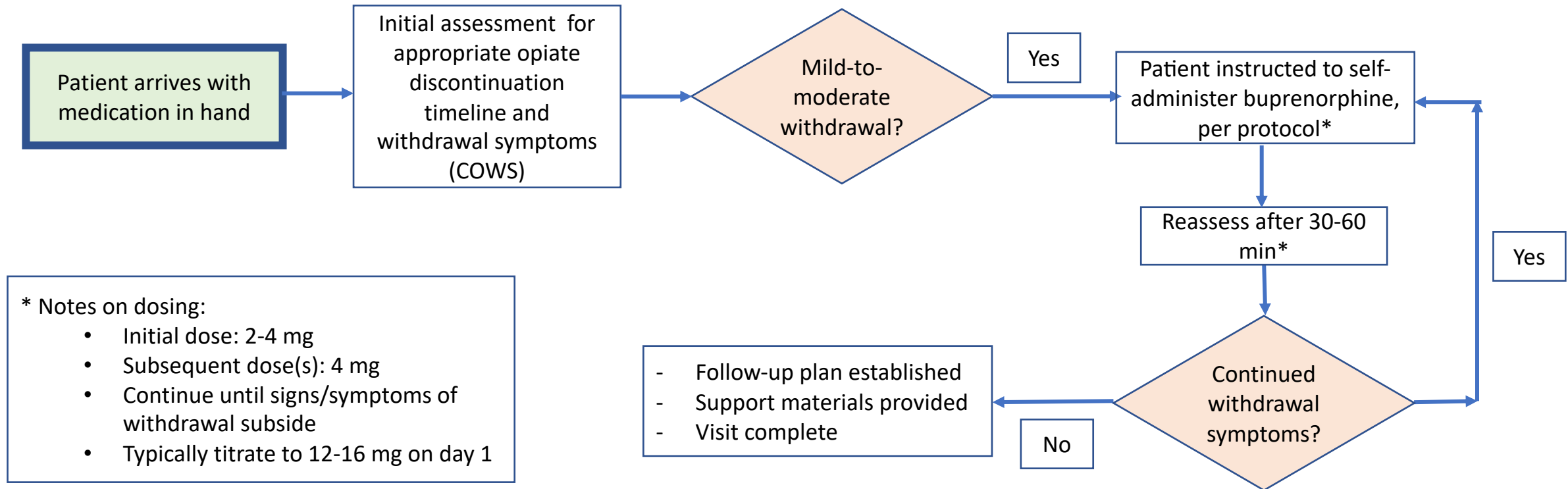
Creating Workflows

General Principals

- Team activity
- Map the “patient journey”
- Consider:
 - Who? How? When? Where?
 - Decision points
 - Warm handoffs
- Define your start and end points
 - Example: Patient identification to medication induction

Example: In-Office Induction

Day 1 Workflow – Patient Arrives in Withdrawal



HOMework

Action Period

- Use the Task List Tool to define roles and responsibilities for your team.
- Develop workflows for key processes.





Thank You

Please email Claire.Nolan@miccsi.org with any questions.

Examples From Practice

Team Roles and Responsibilities

Describe the journey your practice has taken to determine roles and responsibilities for each team member in the care of patients with substance use disorder.