



# Leveraging Lessons Learned: Implementing Telehealth to Sustain Integrated Behavioral Health

**Stephen Shearer, Facilitator/Presenter**

**Sophia Shepard, Co-Facilitator**

**Bonni Brownlee, Presenter**

**Thursday, March 25, 2021**

**Vision: Healthy Communities, Healthy People**





**We are delighted you are part of  
this exciting project.**

**Vision: Healthy Communities, Healthy People**



# Session 8

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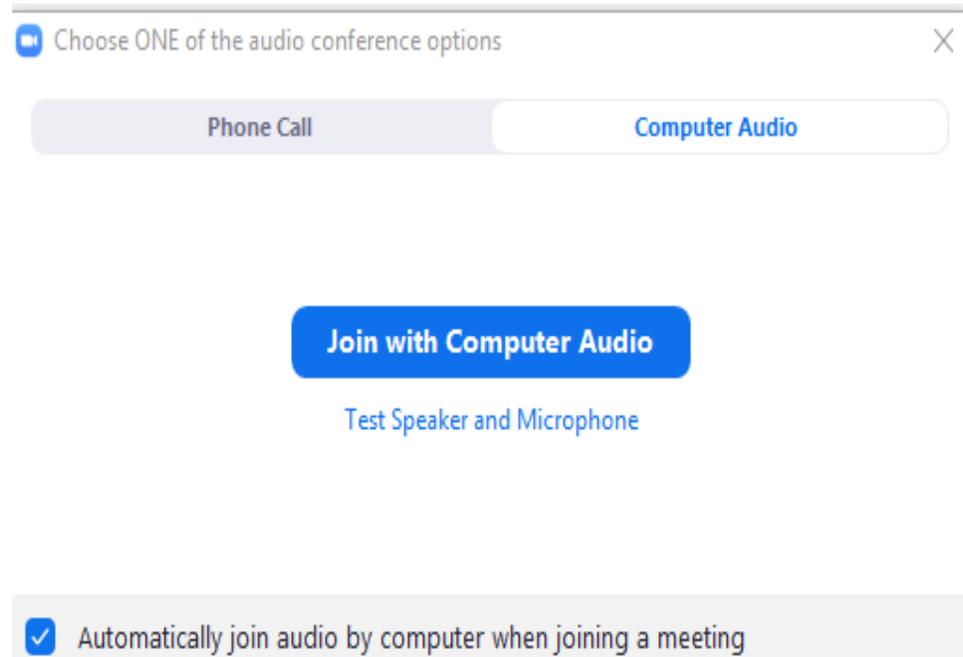
## Patient Experience of Telehealth - Measuring the Patient Telehealth Experience



# Connecting to Audio

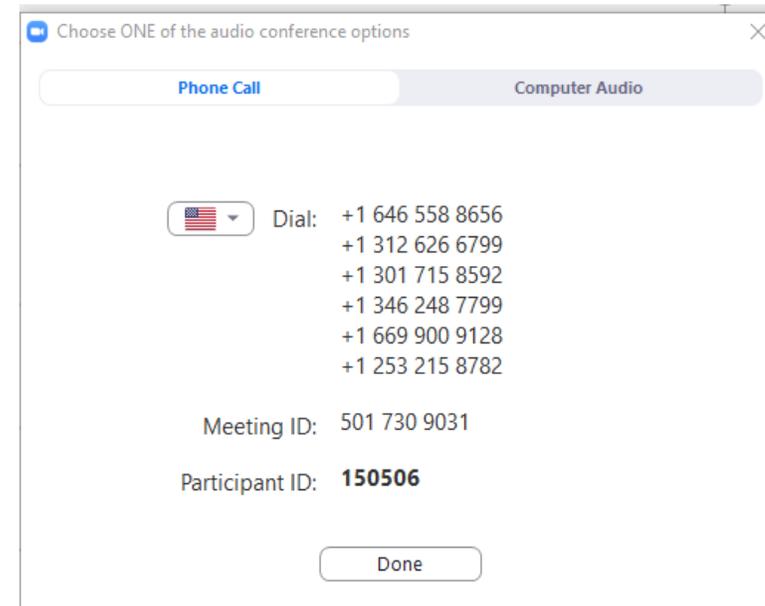
By computer:

- Click **Join with Computer Audio**.



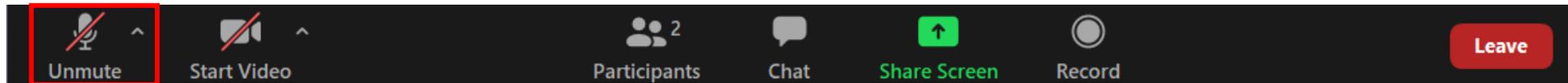
By phone:

- Click the **Phone Call** tab, dial a listed phone number, and **Enter Meeting ID and Participant ID**.

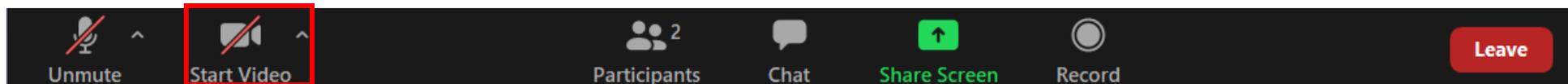


# Zoom Participation

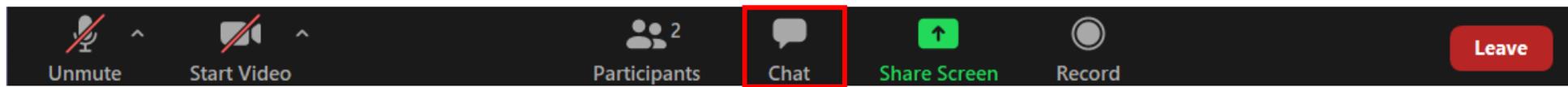
- You will begin muted. To **unmute/mute**, click the **microphone** icon located at the bottom left of your Zoom window.



- We encourage everyone to keep their video enabled. Click **Start Video** to join by webcam.



- To ask a question using the **Chat** feature, click the **Chat** icon located at the bottom center of your Zoom window.



# Session 8 Facilitators and Presenters



Facilitator:  
*Stephen Shearer, B.S., CPHQ,  
CEAP, CCM, CJCP, LADC*  
The Bizzell Group



Co-Facilitator:  
*Sophia Shepard, B.S.*  
JBS International, Inc.



Presenter:  
*Bonni R. Brownlee, M.H.A., CPHQ,  
PCMH-CCE*  
Advocates for Human Potential, Inc.

# Poll #1

We measure our patients' experience with their care through: (Check all that apply)

- In person interviews
- Mail in surveys
- Online surveys (kiosks, portals)
- Advisory Counsel
- Focus Groups
- Comment cards/Suggestion Boxes
- Complaints/Grievances
- Other





# Participant List

These clinics will be reporting out on their Action Plans in session 11 on **April 15, 2021**.

If you know that you *absolutely cannot attend* and need to switch days, let Sophia know by **March 25, 2021**.

State	Organization
AK	Sunshine Community Health Center
AL	AltaPointe Health Systems
CA	Tiburcio Vasquez Health Center
FL	Osceola Community Health Services
IA	Iowa Primary Care Association
IA	Community Health Centers of Southern Iowa
IL	Friend Health
IL	Esperanza Health Centers
KS	Health Partnership
MA	Community Health Programs
MA	Community Health Connections
MO	Ozark Tri-County Health Care dba ACCESS Family Care



# Participant List (cont'd)

These clinics will be reporting out on their Action Plans in session 12 on **April 22, 2021**.

If you know that you *absolutely cannot attend* and need to switch days, let Sophia know by **March 25, 2021**.

State	Organization
MO	Swope Health
MS	Central Mississippi Health Services
MT	Montana Primary Care Association
MT	Bullhook Community Health Center
NM	Mora Valley Community Health Services
OH	Neighborhood Health Association
PA	Northside Christian Health Center
SC	Family Health Centers, Inc.
TX	AccessHealth
TX	Healthcare for the Homeless - Houston
WI	Community Health Systems



# Today's Learning Objectives



Source: iStock

- Describe the reasons, we measure patient's experience with their care.
- Discuss the reasons that patients like and don't like telehealth.
- Discuss the number one priority for patients' satisfaction.

# Session 8: Patient Experience of Telehealth - Measuring the Patient Telehealth Experience



Bonni Brownlee, M.H.A., CPHQ, PCMH-CCE  
*Senior Consultant, Healthcare Solutions Division*  
Advocates for Human Potential, Inc.

# Poll #2

We share our aggregation and trend data on our patients' experience with their care with: (Check all that apply)

- The Board
- Providers
- Line staff
- Peer staff
- Patients
- On our website
- On Social Media platforms



# Discussion Question

What might be some of the benefits of sharing patient satisfaction data with patients and the community?



Source: ThinkStock

# Why measure patient experience?



- Positive patient experiences increase engagement in, and adherence to, care plans and recommendations.
  - Better engagement in prevention and chronic disease management protocols
  - Adherence to medication regimens
  - Experience better health outcomes
- Positive patient experiences are associated with health center benefits.
  - Lower malpractice risk
  - Higher employee satisfaction
- Ongoing assessment of patient experience and satisfaction can inform quality improvement and contribute to program sustainability.
  - Identify gaps in communication skills and patient-centered attributes
  - Highlight inefficiencies and/or poor behavior



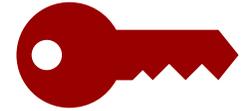
# JD Power Telehealth Experience Survey - 2020

**Surveyed 4,300 individuals in June-July 2020 who had used telehealth in the past 12 months**

- 48% seamless experience with TH services
- 46% primary motive for choosing a telehealth encounter was safety
- 24% services too limited, not able to address my complex issues
- 35% experienced at least one technology issue during a telehealth visit
  - ✓ 26% of those issues were related to audio (the top-cited TH issue)
- 17% technology requirements were too confusing
- 15% didn't know how much telehealth would cost them



# JD Power – Additional Key Learnings 2020



## Overall Health Status

- Patients with lower self-reported health and wellness levels tended to be less satisfied with telehealth.

## Age Bands

- Gen Y, Gen Z
  - highest interest in telehealth across age bands
  - seek telehealth for clinical conditions that trend more towards mental health and behavioral health
- Medicare population
  - highest satisfaction with telehealth across age bands
  - seek telehealth for more classic clinical conditions

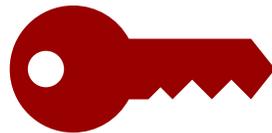


# JD Powers – Key Drivers of Satisfaction

## Respect, Communication

- \*Less than 65% reported an experience in which the provider showed respect and explained things well
- \*Less than 65% reported that they were able to understand the medical professional
  - \*The point they make in the study (Powers) is that it's hard to convey the “soft skills” of empathy and respect in a TH format, and that providers really need help in developing these skills.

#1 priority for patients: An authentic experience between the patient and the healthcare practitioner



# Discussion Questions

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- How do you think telehealth promotes and/or prevents an “authentic” care experience for patients?
- Is your clinic doing any staff training aimed at trying to help staff make each telehealth session feel “authentic” to patients?
- How could staff across as more “authentic” during telehealth sessions?



# Four Key TH Communication Skills and Tools

## **AUTHENTICITY**

- Warm opening and closing; Smile!
- Confirm patient can see you and hear you clearly
- Allow a pause after patient speaks to avoid interruptions
- Explain when you look away from the patient to use the EHR or reference documents

## **AGENDA SETTING**

- Ask the patient to identify priorities
- “Is there anything else?”
- Negotiate the most pressing concern
- Restate the agenda for today’s visit

## **EMPATHY**

- Deliberately address patient concerns
- Use caring language throughout, especially at closing

## **CLOSING CHECKLIST**

- Summarize the plan
- Reinforce provider actions – Rx, lab orders
- Reinforce patient actions – diet, exercise, meds
- Review questions and answers
- Provide guidance for side effects or worsening symptoms
- Offer instructions for follow-up concerns



Source: Press Ganey white paper, May 4, 2020



# 6 Constructs in TH Survey Design – Best Practice

	CONSTRUCT	DEFINITION
1	Satisfaction	Evaluation about whether the user’s expectations were met <b>(overall satisfaction, willingness to use in the future)</b>
2	Experience	Evaluation of the user’s experience of the TH service <b>(comfort, ease, wait times, level of attention to patient’s needs)</b>
3	Technical Quality	Evaluation of the quality of the technology used <b>(audio, video, ease of use, privacy and security)</b>



Source: Center for Care Innovations, May 28 2020, How to Measure Patient Experience and Satisfaction with Telehealth



# 6 Constructs in TH Survey Design (cont'd)

	CONSTRUCT	DEFINITION
4	Perceived effectiveness	Assessment that the telemedicine visit helped improve the health status or wellbeing of the patient <b>(change in health status, measures of health/wellbeing, patient empowerment, patient knowledge, patient reported outcomes)</b>
5	Perceived usefulness	Assessment that the TH visit produced some benefit and achieved the purpose of the visit <b>(convenience, time consequences, cost impact, accessibility, continuity of care, acceptability)</b>
6	Impact of TH on patient-clinician interaction and how it compares to an in-person visit	Assessment that the modality affected patient clinician interaction and/or similarity of TH to an in-person interaction <b>(ease of communication, ability to conduct physical exam, completeness of information, preference for telehealth vs. in-person care)</b>



Source: Center for Care Innovations, May 28 2020, How to Measure Patient Experience and Satisfaction with Telehealth

# What are practices measuring? 10 key performance indicators

## 69% of practices are measuring these top 5 indicators

1. Spent enough time to provide quality care (Experience)
2. Completely resolved medical concern(s) on visit (Perceived Usefulness)
3. Followed up after visit (Perceived Usefulness)
4. Online: Question/problem resolved on first contact (Perceived Effectiveness)
5. Phone: Question/problem resolved on first contact (Perceived Effectiveness)



Source: JD Power 2020 Telehealth Experience Survey

# What are practices measuring? 10 key performance indicators (cont'd)

## Fewer than 66% of practices are measuring these 5 indicators

1. Consultation: Treated me with courtesy and respect (Experience)
2. Consultation: Listened carefully (Experience-Communication)
3. Consultation: Explained things clearly (Experience-Communication)
4. Consultation: Cost-effective for the service I received (Perceived Usefulness)
5. Consultation: Gave easy-to-understand information on health questions or concerns. (Experience-Communication)



Source: JD Power 2020 Telehealth Experience Survey



# Patient Experience Data Collection

QUANTITATIVE	QUALITATIVE
In-person surveys (interview)	Patient/Family Advisory Council
Mail-in surveys	Focus Groups
On-line surveys, portals, kiosks	Leadership Rounds
	Interviews
	Comment Cards, Suggestion Boxes
	“Above and Beyond” Staff Recognition Boards
	Patient Complaints/Grievances

# Sample Patient Experience Survey Questions

**I could clearly see the therapist during the visit.** Technical Quality

**I could clearly hear the therapist during the visit.** Technical Quality

**The telehealth visit was as good as a face-to-face visit.** Perceived Effectiveness

**The camera and other equipment embarrassed me or made me feel uncomfortable.** Experience

**I would have to miss school/work to see the therapist, if it were not for telehealth.** Perceived Usefulness

**My parents like it that I use telehealth (for students only).** Perceived Usefulness

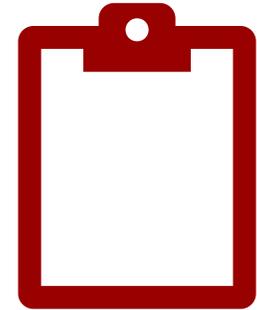
**Overall, I am satisfied with using telehealth.** Satisfaction



# Using TH survey metrics to tell your story

## Number or percentage of patients:

- Using telehealth in your health center
- CHOOSING telehealth over in-person visit for first encounter
- CHOOSING telehealth over in-person visit for subsequent encounters
- Indicating effectiveness of telehealth encounter
- Reporting lack of technology devices
- Reporting poor broadband
- Reporting lack of privacy at home and need for external space to participate in TH visits



# Q&A

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# Wrap Up

- What final questions do you have?
- Next steps:
  - Start working on your Report Out presentation for sessions 11 and 12. (slide template will be sent out in the session 8 follow-up email)
  - Review and be prepared to discuss the Session 9 slide titled "Care is More than the Visit: What is the Telehealth Impact?"



Source: iStock by Getty Images

# Instructions \*do not include this instruction slide when submitting your presentation\*

- The purpose of your presentation is to provide your peers with a brief summary of your Action plan.
- If you had multiple SMART Goals, please **choose only one SMART Goal** to share and base your presentation off of.
- Presentations will be **maximum 3 minutes** long.
- There will be a brief Q&A after each presentation.
  
- **DUE DATE for Session 11 Presenters: COB Friday, April 9, 2021**
- **DUE DATE for Session 12 Presenters: COB Friday, April 16, 2021**



# [Insert Organization Name] Implementation Team

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- Name and title of person on the implementation team
- Name and title of person on the implementation team
- Name and title of person on the implementation team
- Name and title of person on the implementation team
- Name and title of person on the implementation team



# Team Goals and Activities

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- **SMART Goals**

- Insert the SMART goal your implementation team identified to work on throughout the CoP

- **Activities**

- Insert the activities your implementation team undertook at part of your work plan to meet your goal(s)

# Changes

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- **Changes**

- Insert any organizational changes your team implemented or observed as a result of CoP learnings

- **Next Steps**

- Insert any next steps your team and/or organization is thinking about related to your work in this CoP

# Successes and Challenges

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- **Strategies for Success**

- Insert what worked for your team as you implemented your work plan

- **Challenges**

- Insert any challenges or barriers your team experienced in implementing your work plan and working toward your goal(s)

# What Comes Next

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- **Lessons Learned**

- Insert any key lessons learned from the CoP and/or your experience implementing your workplan

- **Next Steps**

- Insert any next steps your team and/or organization is thinking about related to your work in this CoP

# Q&A



# Reflecting on Today: Plus, Delta

- + What worked for you today?
- $\Delta$  What would you change?
- What inspired you today that you could implement in your health center next week?



# Office Hours

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- **Wednesdays 2:00–4:00 p.m. ET**
- Designed to discuss progress and/or challenges related to
  - The session topic,
  - Your team's CoP goal, and
  - Support in between session activity.



# Continuing Education

- We will be offering **1.5 CE credit per session** attended for a maximum of 18 CEs for participation in all 12 CoP sessions.
- You **must** complete the Health Center Satisfaction Assessment after **each** session you plan on receiving CEs for.
- **CE credits will be distributed for all sessions at the conclusion of the CoP.**



This course has been approved by JBS International, Inc. as a NAADAC Approved Education Provider, for educational credits. NAADAC Provider #86832, JBS international, Inc. is responsible for all aspects of their programming.



JBS International, Inc. has been approved by NBCC as an Approved Continuing Education Provider, ACEP No. 6442. Programs that do not qualify for NBCC credit are clearly identified. JBS International, Inc. is solely responsible for all aspects of the programs.

# CoP Satisfaction Assessment

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- Please complete a satisfaction assessment of today's session.
- If you plan to obtain CEUs for your time in this CoP, the Satisfaction Assessment is required.
- There are two ways to navigate to the assessment:
  1. Follow the link provided in the chat.
  2. You will be emailed a link from us via Alchemer, our survey platform.



# TA Offerings for Health Centers

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- Webinars
- One-on-One Coaching
- Virtual Site Visits to Improve Outcomes
- Communities of Practice (CoPs)
- Strategies for Community Outreach: Social Media for Social Marketing



# Upcoming TA Opportunities!

## Webinars

- **Social Determinants of Health and Addressing Health Disparities in Integrated Care Settings**

*Wednesday April 7 - 3:00 – 4:00 PM ET*

*Registration Link: [https://zoom.us/webinar/register/WN\\_gidstu1QRfGspYkBhZtQ1A](https://zoom.us/webinar/register/WN_gidstu1QRfGspYkBhZtQ1A)*

- **Implementing Depression Screening in a Primary Care Setting**

*Wednesday May 5 - 3:00 – 4:00 PM ET*

*Registration Link: [https://zoom.us/webinar/register/WN\\_wlDnh513T8uUMYxdjKaJcg](https://zoom.us/webinar/register/WN_wlDnh513T8uUMYxdjKaJcg)*

You can receive **1 hour of Continuing Education** credit for your participation.



# Upcoming TA Opportunities!

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## Informational Session

- **Using Social Media for Expanding Access to Integrated Care**  
*Thursday, April 15, 1:00–2:00 p.m. ET*

*Registration Link:*

[https://zoom.us/webinar/register/WN\\_yQBnpib0QOm\\_OfqBfK-CwQ](https://zoom.us/webinar/register/WN_yQBnpib0QOm_OfqBfK-CwQ)



# Upcoming TA Opportunities!

## Communities of Practice (CoP) – Weekly for 6 Sessions

- **Social Determinants of Health and Integrated Care**
  - *Cohort 1: Tuesdays, 4/27/21 – 6/1/21, 2:30–4:00 p.m.*  
**REGISTRATION CLOSED.**
  - *Cohort 2: Tuesdays, 6/8/21 – 7/13/21, 2:30–4:00 p.m.*  
<https://zoom.us/meeting/register/tJYkdeivqz4jHNGwrJzV8L4gUoaxTCSCPLu>
- **Integrated Behavioral Health and Value-Based Reimbursement: Two Sides of the Sustainability Coin**
  - *Cohort 1: Thursdays, 4/29/21 – 6/3/21, 2:30–4:00 p.m.*  
<https://zoom.us/meeting/register/tJwuCeCsrDkvGdZGr9I1dXPcdLEkmPq3nSg4>
  - *Cohort 2: Thursdays, 6/10/21 – 7/15/21, 2:30–4:00 p.m.*  
<https://zoom.us/meeting/register/tJUuduqhpluHtwabD2xSdKmuHLR5Qju0XeD>



# BPHC-BH TA Portal

<https://bphc-ta.jbsinternational.com/>

- Request TA
- Access Learning Management System (LMS) modules
- Learn more about BH TA options
  - One-on-one Coaching
  - E-learning Webinars
  - Strategies for Community Outreach
  - Virtual Site Visits to Improve Outcomes
  - Join a Community of Practice (CoP)



**BPHC-BH TA**  
Bureau of Primary Health Care Behavioral Health Technical Assistance

Home | Request Technical Assistance | Learning Management System | About Us | Contact Us

## Welcome to the BPHC-BH TA Resource Portal!

[View](#) [Edit](#) [Delete](#) [Revisions](#)

The Bureau of Primary Health Care (BPHC) Behavioral Health (BH) Technical Assistance (TA) portal is designed to meet the specific needs of HRSA health centers and shall focus on both mental health and substance use disorders (referred to jointly as “behavioral health”), with an emphasis on the opioid epidemic.

### Learn About BH TA Options

- One-on-One Coaching
- E-learning Webinars
- Strategies for Community Outreach
- Virtual Site Visits to Improve Outcomes
- Join a Community of Practice (CoP)

### Complete the Readiness Assessment



# Thank You!

Facilitator Contact Information:

Stephen Shearer: [sshearer@thebizzellgroup.com](mailto:sshearer@thebizzellgroup.com)

Sophia Shepard: [sshepard@jbsinternational.com](mailto:sshepard@jbsinternational.com)

Vision: Healthy Communities, Healthy People

