

INTEGRATIVE SHARED MEDICAL APPOINTMENTS

The following describes the content and subject matter pertaining to Renee Kakareka's 2018 special project for the Health for America at MedStar Health fellowship. This project was performed in parallel with other assignments to support the MedStar Institute for Innovation integrative medicine team.

Exploration

1

Problem

According to the CDC in 2015, **seven out of the ten top causes of death** in the United States were preventable, chronic diseases and some predictions show that **18% of men and more than 21% of women** will be obese by 2025. The World Health Organization recognizes that **chronic diseases are preventable** through proper management of **lifestyle factors** such as diet, exercise, tobacco use, stress and community support which effect the pathology and prevalence of chronic diseases. However, today's health care systems often lack adequate resources and structures to provide the long-term education, monitoring, and support necessary for sustainable lifestyle change.

Ideation

2

Project Proposal

Solution: To address these challenges, we began looking at Shared Medical Appointments (SMAs) as a solution. SMAs are encounters where a group of patients receives education and/or consultations for common challenges of disease management, health maintenance and wellness. SMAs provide an interdisciplinary, cost-effective approach to providing medical care, health education and hands-on lifestyle and culinary medicine. **Project:** Develop a systematic and sustainable model for Shared Medical Appointments (SMAs) in MedStar Health. Design and test user-friendly tools for providers and project managers to create new SMA programs.

Tools include:

1. **SMA Guide** - A comprehensive booklet which describes the system and process of designing, running and assessing SMAs at MedStar.
2. **SMA Spreadsheet** - A spreadsheet that aligns with the guide to document and automate the planning, the business case and execution of SMAs.
3. **Document Templates** - Flyers, recipe cards, intake forms and more!

Implementation

3

SMAs at MedStar

The SMA model described in the tools created throughout the 2017-2018 HFA fellowship was initially piloted with patients and clinicians from Cardiology Associates and Internal Medicine at MedStar Lafayette Center in the fall of 2017. These initial pilots successfully demonstrated improvements in patients' habits through lifestyle education and hands-on lifestyle and cooking activities. Patient-reported changes included: switching to a vegan lifestyle and losing over 60 lbs, influencing family members to make healthy food swaps and developing a sense of community among patients.

Tools created during this HFA project will be used for the following SMA programs:

1. Fresh and Savory at MedStar Lafayette Center
2. Sports Performance powered by Fresh and Savory
3. Washington Cancer Institute Lifestyle Medicine feasibility study
4. Integrative Medicine SMA at MedStar Georgetown University Hospital

SMA GUIDE AT A GLANCE

30 STEPS TO EFFECTIVE SHARED MEDICAL APPOINTMENTS

I INTRODUCTION TO SMAS
Provides an overview of SMAs; the basic structure; the planning process; the general business case; clinical evidence; and outlines how to use the guide

II SMA HIGH-LEVEL PLANNING
Basic questions to decide if an SMA is right for the provider and his/her patient population

III SMA DETAILED PLANNING
Each of the steps in this section run in parallel and help the SMA team to design the details of the program

VI CONDUCT SMAS
Steps to plan, prepare and operate an effective SMA program

- 1** WHY run an SMA program?
- 2** WHERE will your program be held?
- 3** WHO are the patients?
WHO is on your SMA Team?
- 4** WHEN will your program be held?
- 5** WHAT content will you include?
HOW will you structure your program?

- 6** Schedule SMA time for your team
- 7** Design your detailed SMA content
- 8** Confirm speakers & create your SMA schedule
- 9** Estimate your food & drink costs

- 18** Time block your SMA workflow & designate staff roles
- 19** Plan your room layout
- 20** Create your weekly preparation plan
- 21** Order supplies & groceries
- 22** Prepare patients for each session
- 23** Prepare speakers & presentations
- 24** Processes for patient intake & provider consultations
- 25** Gather patient feedback & make real-time improvements
- 26** Review & wrap up your SMA program

V PATIENT RECRUITMENT
Guidelines on recruiting adequate patients, providing information about the SMA and registering patients

- 15** Develop your recruitment message
- 16** Recruit 3x your patient target volume
- 17** Register patients for the SMA program

IV BUSINESS CASE
The SMA Spreadsheet helps to develop a budget, calculate reimbursement and relative value units (RVUs) which ultimately calculates financial return and provider productivity

- 10** Start-up costs
- 11** Calculate personnel costs
- 12** Develop supplies costs
- 13** Other fees & service costs
- 14** Calculate insurance reimbursement, patient volume & relative value units (RVUs)

VIII SUSTAINABILITY & PATIENT FOLLOW-UP

- 29** Monitor Patient Progress
- 30** Explore Community Partnerships

Planning another SMA Program?

Use the data you collected, feedback and lessons learned to make program improvements. Create a new SMA Spreadsheet and start again!

VII PATIENT METRICS

- 27** Collecting patient data
- 28** Documenting quality improvement research

IX TRAINING
Resources for books, research, other SMA guidelines and online or in-person classes

X APPENDIX
Resources and templates for each step of planning and execution