



Developing A Standardized Enabling Services Data Collection Model At FQHCs

Live Virtual Learning Series: Part 1 – Thur., Oct. 15, 2020 9am-10:30am PST



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BACKGROUND



Providing enabling services, such as connecting people to housing, food and employment resources is important for increasing access to care and leads to better health outcomes. Health centers need to collect data on the enabling services they provide to demonstrate the complexity of the clients they serve and the value of this work to payers and policy makers.

During a 3-part live virtual learning series, Health Outreach Partners (HOP) will train health centers how to codify enabling services, create a standardized data collection model to improve data collection, and better understand impact on health care access and outcomes.



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TRAINING OBJECTIVES



As a result of the training, participants will be able to:

- Delineate and define each enabling service category
- Use the enabling services data collection protocol
- Understand how the protocol can be implemented and data used
- Develop a proposed work plan for pilot implementation at their health center
- Provide guidance or train staff on the protocol

Three-Part Learning Series

Pre-Training: Video Review

Part 1 : Thur., Oct. 15, 2020 9:00am-10:30am PST

- Module 1: Enabling Services Data Collection Protocol
- Breakout: Enabling Service Documentation Practice #1

Pre-Training: Homework & Video Review

Part 2: Thur., Oct. 22, 2020 9am-10:30am PST

- Breakout: Enabling Services Documentation Practice #2
- Module 2: Data Collection & Analysis

Pre-Training: Video Review

Part 3: Thur., Oct. 29, 2020 9am-10:30am PST

- Module 3: Planning for Implementation
- Breakout: Making Enabling Services Data Collection Work
- Next Steps

INTRODUCTIONS



Host:
Patricia Gepert
Health Access Coordinator



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Presenter:
Cynthia Selmi
Executive Director



Presenter:
Beleny Reese
Project Manager



Health Outreach Partners

WWW.OUTREACH-PARTNERS.ORG

WE SUPPORT HEALTH OUTREACH PROGRAMS by providing training, consultation, and timely resources.

OUR MISSION IS TO BUILD STRONG, EFFECTIVE, AND SUSTAINABLE HEALTH OUTREACH MODELS by partnering with local community-based organizations across the country in order to improve the quality of life of low-income, vulnerable and underserved populations.

WE SERVE Community Health Centers, Primary Care Associations, and Safety-net Health Organization



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Agenda

- **Welcome and Introductions, Icebreaker (10 min)**
- **Module 1:Enabling Services Data Collection Protocol (30 min)**
 - **Brief review of Enabling Services Accountability Project**
 - **Enabling Services Category Definitions**
 - **Documentation Guidelines and Criteria**
 - **Presentation of Sample ES EHR Template**
- **Breakout Groups: Enabling services Documentation Practice (30 min)**
 - **Group Practice**
- **Re-Group and Share Back : (10 min)**
- **Session 2 Preview and closing (5 min)**



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Group Agreements

We aim to create a safe space to learn and share with each other.

To do so, we will:

- Respect the value of each other's opinions and experiences
- Maintain confidentiality
- Acknowledge its okay to disagree, respectfully and openly
- Remain present and engaged
- Listen to each other
- Seek to understand our blind spots
- Assume positive intent
- Honor the limitations of time, speak concisely
- Know when to *Step up* and *Step back*
- Practice mindfulness and self-care
- *Mute microphones when not speaking
- *Keep cameras on



Ice Breaker Poll



VS.



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Enabling Services Data Collection Protocol

- **Enabling Services Accountability Project**
- **Category Definition**
- **Documentation Guidelines**
- **Presentation of Sample EHR Template**



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Definition of Enabling Services

...non-clinical services that are provided to health center patients that promote support and assist in the delivery of health care and facilitate access to quality patient care.

- NACHC/MGMA 2000



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Enabling Services Accountability Project

What is the ES Accountability Project?

- Collaborative effort between AAPCHO and 4 FQHC health centers –
 - Waianae Coast - HI Comprehensive Health Center
 - Charles B Wang Community HC in NY NY
 - International Community Health Services in Seattle
 - Kalihi-Palama Health center in Honolulu
- Increased Electronic Medical Record Data collection
- The project illustrated the role ES play on increased access, improved quality of care for underserved communities, and improved health outcomes
- Provided compelling data to compensate health centers for providing these services



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Key Areas of Study

- Included 8 Enabling Services measures or categories (updated to 15 categories by AAPCHO)

• Social Services Assessment	• Case Management
• Referral (2)	• Interpretation
• Health Education (4)	• Eligibility Assistance/Financial Counseling
• Transportation (2)	• Outreach
• Inreach	• Other Services

- Two performance measures/outcomes
 - Adult Diabetes
 - Childhood Immunization
- The study also compared the demographics between Enabling Services users and non-users.

Outcomes of Study

- Better outcomes on both measures for the ES users
- Illustrates- that vital role of ES in reducing health disparities and improving service quality
- Illustrates developing long term federal and state initiatives to fully fund and support these services
- Preliminary evidence shows that Health education plays a critical role in improving health access. Without the data – health education will be inadequately financed by health centers and funders



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Health Outcomes



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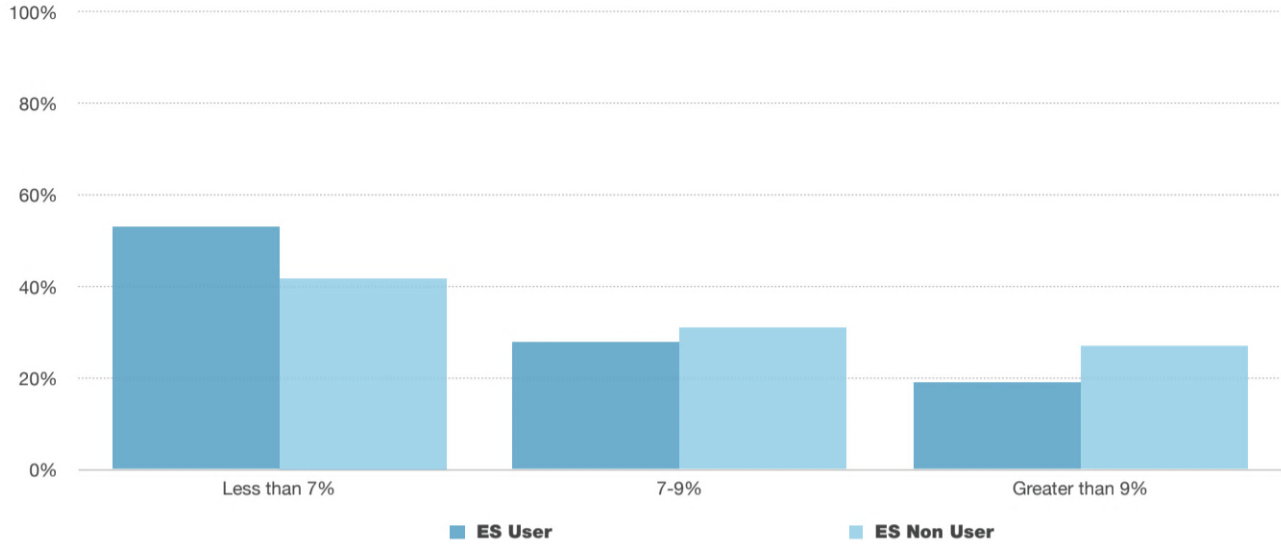


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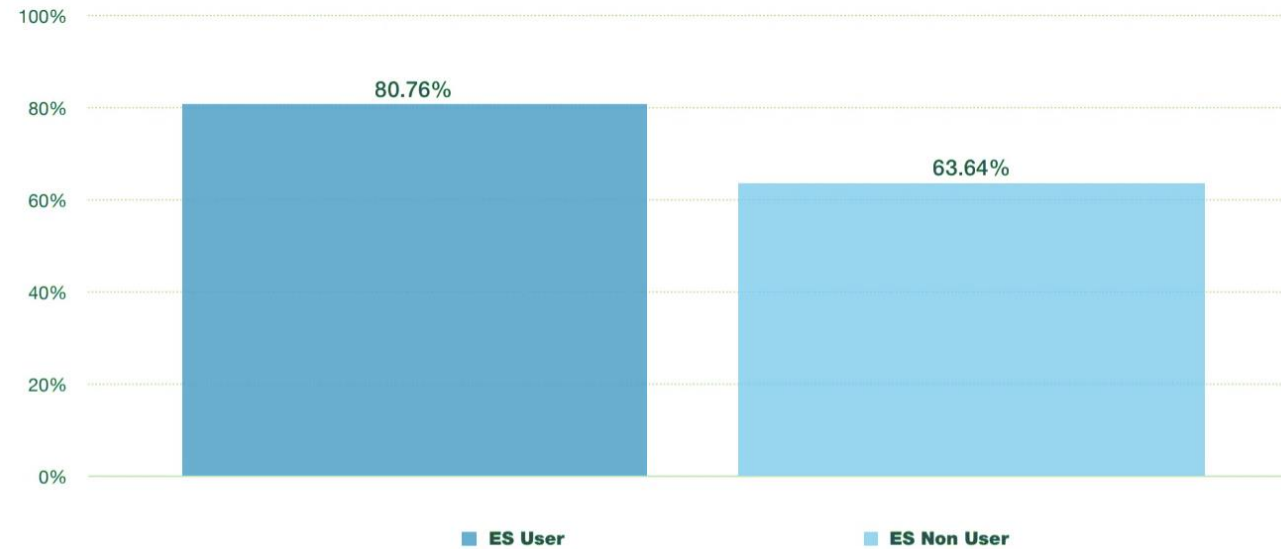
HBA1C LEVELS

+ More ES users had their HbA1c under control compared to ES nonusers.



APPROPRIATE IMMUNIZATION PERCENTAGE

+ ES users had a higher percentage of patients that received appropriate immunizations.



Enabling Services Categories

Revised Categories	Code
Social Services Assessment	SS001
Case Management	CM001
Referral- Health	RF001
Referral- Social Services	RF002
Financial Counseling/Eligibility Assistance	FC001
Health Education- Individual (one-on-one)	HE001
Health Education- Small Group (2-12)	HE002
Health Education- Large Group (13 or more)	HE003
Supportive Counseling	SC001
Interpretation	IN001
Outreach	OR001
Inreach	IR001
Transportation- Health	TR001
Transportation- Social Services	TR002
Other	OT001



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Social Service Assessment

Non-medical assessment that includes the use of an acceptable instrument measuring socioeconomic status, wellness, or other non-medical health status



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Case Management

An encounter with a patient or their household/or family member in which a comprehensive patient centered care plan is developed or monitored.



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Referral Health & Social Services

Facilitation of a visit with a patient to a healthcare or social service provider.



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Eligibility Assistance/ Financial Counseling

Counseling of a patient with financial limitations and assessing the patient's eligibility to a sliding fee scale or health insurance program (i.e. Medicaid, Medicare, CHIP, etc.) or pharmaceutical benefits program; or assistance in the development of a payment plan.



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Health Education/ Supportive Counseling

Provision of learning experiences
designed to help individuals improve
their health.



SUBCATEGORIES

HE001 – Health Education - Individual

HE002 – Health Education – Small
Group 2-12

HE003-Health Education-13 or more

HE004 – Supportive Counseling



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Health Education Subcategories

- **Individual:** The provision of learning experiences in an one-on-one encounter designed to help an individual improve their health.
- **Small Group:** The provision of learning experiences to a small group designed to help individuals improve their health.
- **Health Education (13 or More):** same as above to a larger group
- **Supportive:** The provision of support to patients to mitigate distress or concerns regarding diagnosis or other issues affecting their health or wellbeing.



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Interpretation

The provision of interpreter services by a third party (other than the service provider) intended to reduce barriers to a limited English-proficient (LEP) patient or a patient with documented limitations in writing or speaking skills sufficient to affect the outcome of a medical visit or procedure. [Includes sign language]



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Transportation

Health: Providing transportation assistance [directly or via referral] to a patient requiring transport to receive appropriate medical care

Social Services: Providing transportation assistance [directly or via referral] to a patient requiring transport to receive appropriate social services.



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Outreach & Inreach

OUTREACH: Providing information about health center services in order to recruit new patients.

INREACH: Provision of services not linked to an existing care plan that are aimed at engaging existing patients in order to ensure appropriate and timely care

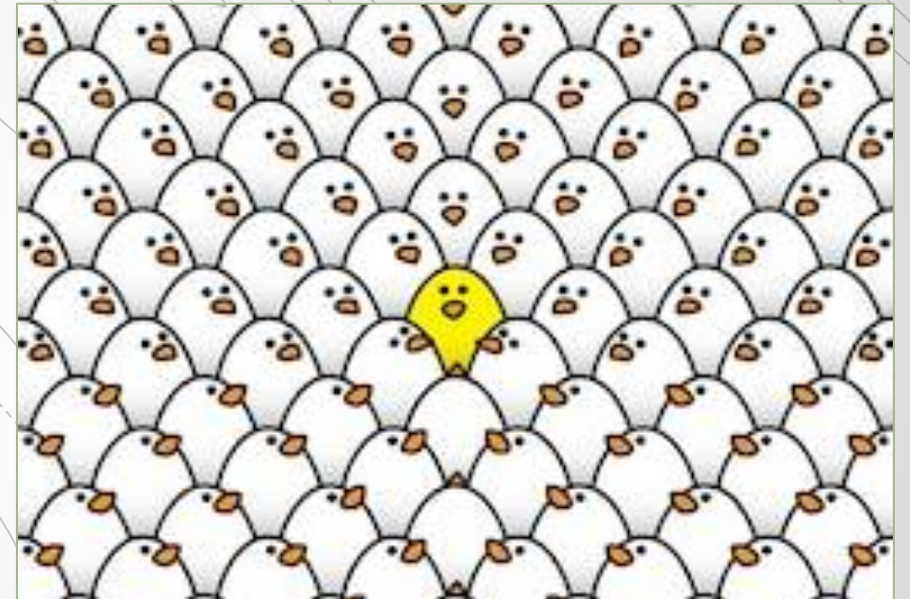


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Other Services

Provision of services that reduces access to barriers to health care and addresses social services needs of a patient and that do not fall into the other established service categories.



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Documenting Guidelines & Criteria

How to accurately describe and record Enabling
Services encounters



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Documentation Criteria

IN ORDER FOR AN ES ENCOUNTER TO BE VALID, THE SERVICE MUST:

- be provided by a staff member or volunteer of the health center/contractor
- be linked to a medical patient of the health center
- be provided directly to the patient or to their primary caregiver (e.g. parent)
- Be documented on one encounter form per patient, even if multiple services were provided



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Documentation Criteria: Time

- A valid ES encounter must be at least **10 minutes** in duration
- Any encounter *less than* 10 minutes should **not** be recorded
- Encounters lasting *more than* 10 minutes should be recorded in 10-minute increments
 - Direct patient time only
 - Does not include documentation time
- For encounters that fall in between 10-minute increments:
 - Round down if ≤ 4
 - Round up if ≥ 5



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Sample ES Standardized EHR Template

Enhanced Services						
Patient: Man Zztest			Age: 30 Years		Gender: Male	
Current Provider: Kimo C. Hirayama MD						
Service Date	Provider ID	Staff ID	Patient ID	DOB	Gender	Zip Code
05/20/2010	Kimo C. Hirayama MD	Jian Z. Wong	267440	02/19/1980	M	98104
Encounter Type		<input type="radio"/> Face to Face		<input type="radio"/> Telecommunication		<input type="radio"/> Off-site
Appointment Type		<input type="radio"/> Scheduled		<input type="radio"/> Walk-in		
Group or individual		<input type="radio"/> Group		<input type="radio"/> Individual		
Primary Language				Race		Ethnicity
Vietnamese				Asian		
Check if applicable <input type="checkbox"/> Service provided in language other than English				Place of Birth		
Person Providing Service						
<input type="radio"/> Case Manager		<input type="radio"/> Health Educator		<input type="radio"/> Nurse		<input type="radio"/> Physician's Assistant / ARNP
<input type="radio"/> Community Health Worker		<input type="radio"/> Interpreter		<input type="radio"/> Nutritionist		<input type="radio"/> Psychologist
<input type="radio"/> Counselor/Therapist		<input type="radio"/> Medical Assistant		<input type="radio"/> Outreach Worker		<input type="radio"/> Receptionist
<input type="radio"/> Dental Personnel		<input type="radio"/> Midwife		<input type="radio"/> Pharmacist		<input type="radio"/> Social Worker
<input type="radio"/> Eligibility/Financial Worker				<input type="radio"/> Physician (MD or DO)		<input type="radio"/> Other
Enhanced Service(s) Provided						
Place of Service						
Case Management - Assessment					Save	
Case Management - Treatment Plan & Facilitation					Save	
Case Management - Referral Service					Save	
Financial Counseling / Eligibility Assistance					Save	
Health Education / Supportive Counseling					Save	
Interpretation / Translation					Save	
Outreach Services					Save	
Transportation Services					Save	
Other Enhanced Services					Save	



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Sample EHR Template: Tailored

SW Enabling Service: ASTHMA TEST

Time per Enabling Service (in minutes)

Assessment <input type="checkbox"/> SW Intake Assessment <input type="checkbox"/> SW Ongoing Assessment	Health Education <input type="checkbox"/> SW Individual <input type="checkbox"/> SW Group
Treatment and Facilitation <input type="checkbox"/> SW Individual Support Counseling <input type="checkbox"/> SW Marriage/Partnership Counseling <input type="checkbox"/> SW Family Counseling <input type="checkbox"/> SW Parenting Counseling <input type="checkbox"/> SW Review Reproductive Health Care Options <input type="checkbox"/> SW Case Coordination <input type="checkbox"/> SW Case Advocacy <input type="checkbox"/> SW Provide Information/Resource	Financial/Eligibility Counseling <input type="checkbox"/> PCAP <input type="checkbox"/> Medicaid <input type="checkbox"/> Medicare <input type="checkbox"/> Managed Care <input type="checkbox"/> SSI <input type="checkbox"/> Public Assistance <input type="checkbox"/> Public Housing <input type="checkbox"/> Other
Referral Services <input type="checkbox"/> SW Early Intervention/Special Education <input type="checkbox"/> SW Skilled Nursing <input type="checkbox"/> SW Domestic Violence Service <input type="checkbox"/> SW Home Care <input type="checkbox"/> SW Children/Elderly Protective Service <input type="checkbox"/> SW Preventive Service <input type="checkbox"/> SW MH Service <input type="checkbox"/> SW WIC <input type="checkbox"/> SW Other Referral	Interpretation Services Outreach Services Transportation Other

Health Education: AB TEST

Health Education

Encounter Date: Department Referral:

Encounter Type:
 Face to face
 Off-site
 Telephone
 E-mail

Appointment Type:
 Scheduled
 Walk-in

Group or Individual:
 Group
 Individual

Language Used:
 Cantonese
 Mandarin
 Other Chinese dialect
 English
 Korean
 Other

Person Educated:

Time Per Enabling Service (In Minutes)

Assessment	Interpretation Services
Treatment and Facilitation	Transportation
Referral Services	Outreach Services
Health Education	Other Enabling Services (13 or more)
Financial/Eligibility Counseling	

Topics

Healthy Lifestyle <input type="checkbox"/> Child Development <input type="checkbox"/> Healthy Aging <input type="checkbox"/> Nutrition <input type="checkbox"/> Physical Activity <input type="checkbox"/> Prenatal Care <input type="checkbox"/> Smoking Cessation <input type="checkbox"/> Weight Management <input type="checkbox"/> Other	Disease Prevention and Self-Management <input type="checkbox"/> Asthma <input type="checkbox"/> Cancer <input type="checkbox"/> COPD <input type="checkbox"/> Diabetes <input type="checkbox"/> Gastrointestinal Disease <input type="checkbox"/> Heart Disease <input type="checkbox"/> Hepatitis <input type="checkbox"/> Hypertension <input type="checkbox"/> Kidney Disease <input type="checkbox"/> Medication Management <input type="checkbox"/> Preventive Health <input type="checkbox"/> Other
Access to Care <input type="checkbox"/> Provider-Patient Communication <input type="checkbox"/> Electronic Access To Health Information <input type="checkbox"/> Other	

Comments:

Completed by:

Sample EHR Template: Tailored 2

Health Education Time <input type="text"/>	Health Education/Supportive Counseling (HE001) <input type="checkbox"/>
Group Education Time <input type="text"/>	Group Health Education/Supportive Counseling (HE002) <input type="checkbox"/>

Provision of health education or supportive services to individuals or groups of 12 or less in which wellness, preventive disease management or other improved health outcomes are attempted through behavior change methodology.

Individual	Group
<input type="checkbox"/>	<input type="checkbox"/> Breast/Cervical Cancer Education X5201
<input type="checkbox"/>	<input type="checkbox"/> Individual Education X5008
<input type="checkbox"/>	<input type="checkbox"/> Immunization/EPSTD X5098
<input type="checkbox"/>	<input type="checkbox"/> Injury Prevention X5099
<input type="checkbox"/>	<input type="checkbox"/> Harm Reduction X5106
<input type="checkbox"/>	<input type="checkbox"/> Nutrition X5107
<input type="checkbox"/>	<input type="checkbox"/> Individual Supp Counseling X5116
<input type="checkbox"/>	<input type="checkbox"/> Lifestyle Supp Counseling X5132
<input type="checkbox"/>	<input type="checkbox"/> Family Supp Counseling X5118
<input type="checkbox"/>	<input type="checkbox"/> Family Planning X5229

[Page Down](#)

Interpretation Time <input type="text"/>	Interpretation (IN001) <input type="checkbox"/>
<input type="checkbox"/> Linguistic Services X5023	

The provision of interpreter services by a third party (other than the primary care giver) intended to reduce barriers to a limited English-proficient patient or a patient with documented limitations in writing or speaking skills sufficient to affect the outcome of a medical visit or procedure.

<input type="checkbox"/> Svc. Provided in other language X5340
--

Enabling provider interpreting



Practice

Identification & Documentation



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Practice Scenario 1

As an Outreach Worker, your clinic is hosting a booth at the local Grandparents and Parents conference. A 52 year old, uninsured grandmother spends 15 minutes speaking with you regarding applying for insurance and her need for a primary care physician. You schedule an appointment for her to see a nurse practitioner in two weeks. After the day of her appointment, you follow-up and she kept her appointment with your clinic's medical provider.

What type of services were provided and for how long?



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Practice Scenario 1 - Answer

- **Type of service(s) provided:**
 1. Outreach
- **Duration: 20 minutes**



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Practice Scenario 2

A 34-year-old female patient from Mexico has several conditions, including diabetes and back pain from her work in the tomato fields. She and her husband are both undocumented and they have two young children. During her most recent scheduled visit, you first spent 8 minutes to assess her children's eligibility for Medicaid. Then you spent another 34 minutes to develop a management plan for her diabetes. You also spent an additional 17 minutes to arrange a referral to a physical therapist. You are bilingual in English and Spanish and provided all services to her in Spanish.

What type of services were provided and for how long?



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Practice Scenario 2 - Answer

- **Type of service(s) provided + duration :**
 1. **Case Management – 30 mins**
 2. **Referral - Health – 20 mins**
 3. **Eligibility Assistance?**
 4. **Interpretation?**



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Practice Scenario 3

A 55-year old man who is experiencing homelessness came to your health center's mobile medical unit during its weekly rounds at a local church. You performed a psychosocial assessment, which took 24 minutes. You also spent 18 minutes talking with him about his challenges related to alcohol dependency and 12 minutes talking to him about a supportive housing program.

What type of services were provided and for how long?



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Practice Scenario 3 - Answer

- **Type of service(s) provided + duration:**
 1. **Case Management – 20 mins**
 2. **Supportive Counseling – 20 mins**
 3. **Other – 10 mins**



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Homework Assignment

With your group members:

- Create 2-3 sample scenarios based on recent ES encounters at your sites
- Don't be afraid to use challenging examples
- Have an answer key!
- Have one member of your group email scenarios and answers to beleny@outreach-partners.org by Midnight on Tuesday Oct. 20th



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Next Week:

Data Collection & Analysis

See you then!



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