

Care Coordination: Empowering Families Facilitator's Notes

This is a sample for organizations interested in partnering with Heartland to offer the training. Each section includes an example from the facilitators' notes. Section IV, Expanding Care Coordination, is included in its entirety to provide a sense of the depth of the curriculum. Trainers will receive the full facilitation manual in conjunction with the facilitation training and trainer certification process. The certification process and facilitation training is required to maintain fidelity to the model.

This training curriculum is a product of the Region 4 Genetics Collaborative. The Region 4 Genetics Collaborative is a project of the Michigan Public Health Institute and is funded under the Maternal and Child Health Bureau of the Health Resources and Services Administration (MCHB/HRSA), Genetic Services Branch (GSB) grant U22MC03963 and H46MC24092. This curriculum was developed in partnership with Traci Riehl of Riehl Solutions Inc., Okemos Michigan, www.MakeltRiehl.com.

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OBJECTIVES:

By the end of the training participants will:

1. Identify the components of a Medical Home
2. Define their role in coordinating care for their child
3. Identify one technique they can use to build a health partnership
4. Understand basic guidelines for advocacy
5. Recognize effective communication skills
6. Identify key members of the child's care team
7. Expand concept of care coordination beyond medical.
8. Know how to use Coordinated Care Plan to facilitate communication between care providers
9. Understand the need to plan for child's transition
10. Identify two different methods of organizing information
11. Have increased knowledge of ACA as it applies to CYSHCN
12. Identify one resource that can help them navigate insurance
13. Identify one technique for dealing with denied insurance claims
14. Identify three key concepts for evaluating resources
15. Recognize the importance of self-care
16. Understand the value of peer support

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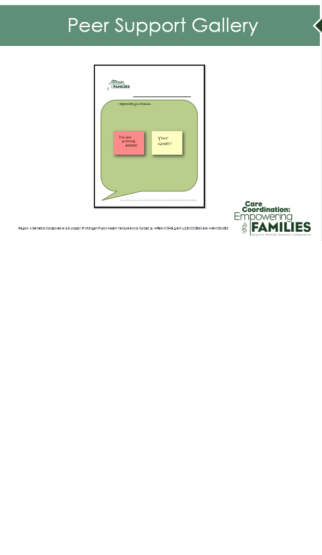
SCHEDULE FOR THE DAY

9:00 a.m. – 9:45 a.m.	Section I	Welcome
9:46 a.m. – 10:35 a.m.	Section II	Exploring Care Coordination
10:36 a.m. – 10:45 a.m.	<Morning Break>	
10:46 a.m. – 11:55 a.m.	Section III	Communication Skills for Advocacy
11:56 a.m. – 12:30 p.m.	<Lunch>	
12:31 p.m. – 1:30 p.m.	Section IV	Expanding Care Coordination
1:31 p.m. – 1:45 p.m.	Section V	Organizing Information
1:46 p.m. – 2:30 p.m.	Section VI	Navigating Insurance
2:31p.m. – 2:45 p.m.	<Afternoon Break>	
2:46 p.m. – 3:30 p.m.	Section VII	Finding Reliable Resources
3:31 p.m. – 4:10 p.m.	Section VIII	From Cope to Hope
4:11 p.m. – 4:30 p.m.	Recap and Conclusion	

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SECTION I WELCOME (9:00 a.m. – 9:45 a.m.)

Overview: This section is to orient participants to the training. They will become familiar with the facilitators, facility, classroom, fellow participants, supplies, and schedule. They will also be introduced to journaling.


Theme	Time	Discussion	Tools	Visual
Introduce Peer Support Gallery	0:02	<ol style="list-style-type: none"> 1. "One of the things we will be discussing today is the importance of peer support. Each person has a Peer Support sheet in front of them. Please place your name on it and tape it to the front of your table. Then I'd like everyone throughout the rest of the day to use your post it notes to encourage and support each other." 2. "Use statements like: I admire you because...., your story impacted me because...., you made me think differently...., you showed your strength when....., etc." 3. "Be aware of the need to support others. If someone's paper is a little light, think of ways you can support them." 4. As a facilitator, give a few examples and post them on a participant's gallery to start. The facilitator should try to provide one contribution to each participant's gallery throughout the day. (Note: have a sheet with all participants' name on it in front of you, so you know who you need to give post it notes to) 	Peer support sheet on tables	

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SECTION II EXPLORING CARE COORDINATION (9:46 a.m. – 10:35 a.m.)

Overview: This section will define care coordination, explore the concept of a Medical Home and consider the parent's role in coordinating care for their child.

Objectives: Participants will:
 Identify the components of a medical home
 Understand the relationship between care coordination and medical home
 Define their role in coordinating care for their child


Theme	Time	Discussion	Tools	Visual
Medical Home Activity	0:25	<ol style="list-style-type: none"> 1. "We are going to look at the characteristics of a medical home in the Medical Home Guide (pg. 6) for a group activity next." 2. Put participants into groups of 3-4 people. "Each group is going to create some advertising for a doctor's office that is a medical home. Read through and think about the characteristics on page 6 in your guide and pretend you have been asked to create a billboard designed to highlight what a medical home is. How would you create a billboard to advertise for them? You may use one, two or any number of the characteristics listed on page 6." 3. We will have about 10-15 minutes to draw your billboard. Feel free to get creative and use your imagination. Once we have created our billboards you will have someone from each group share it with the group". 4. Give 5 minute warning. 5. Have one person from each group come to the front of the room to share the group's billboard. Put each billboard on the wall around the room. 	<p><i>Divide into groups of 3-4</i></p> <p><i>A sheet of flip chart paper for each group and colored markers</i></p>	

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SECTION III COMMUNICATION SKILLS FOR ADVOCACY (10:46 a.m. – 11:55 a.m.)

Overview: Many parents express that advocating for their child is a priority. Often they may not consider communication skills as a way to improve advocacy. This section explores both while connecting back to the characteristics of a medical home.

Objectives: Participants will:
Identify one technique they can use to build a health partnership
Understand basic guidelines for advocacy
Recognize effective communication skills

Theme	Time	Discussion	Tools	Visual
Effective Communication	0:03	<p>1. "As you work on being a more effective communicator consider these tips:"</p> <ul style="list-style-type: none"> • State the challenge and set a positive tone. Notice I said challenge and not problem. How you approach someone right from the beginning can influence the outcome. • Explore each other's needs. Find out what each other needs to have happen. • Ask open-ended questions. How can we...? What would happen if...? Avoid yes/no questions • Use active listening. Watch talk/listen ratio, don't think of response when other person is talking. • Observe non-verbal cues. What are some non-verbal clues we may want to watch for? Examples are frowning, arms crossed, and not making eye contact. • Avoid interpreting motives. Again, assume good intentions and that the person is motivated by wanting the best for your child, even when you seem at odds. • Identify possible options and select the best one. Talk about what may work and decide together which best suits everyone involved. • Reach Resolution. 		 <p>Effective Communication</p> <ul style="list-style-type: none"> ✓ State the challenge & set positive tone ✓ Explore each other's needs ✓ Ask open-ended questions ✓ Use "active listening" ✓ Observe non-verbal cues ✓ Avoid interpreting motives ✓ Identify possible solutions and select best one ✓ Reach resolution <p>Care Coordination: Empowering FAMILIES</p>

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SECTION IV EXPANDING CARE COORDINATION (12:31 p.m. – 1:30 p.m.)

Overview: In this section, participants will identify key people in a care coordination team, expand thinking beyond just medical providers and be introduced to the Coordinated Care Plan as a means of facilitating communication between care providers. They will also be encouraged to think about different transitions in child's life.

Objectives: Parents will:
Identify key members of the child's care team
Expand concept of care coordination to beyond medical
Know how to use Coordinated Care plan to facilitate communication between care providers
Understand the need to plan for child's transition



Supplies: Flip chart and Markers
Coordinated Care Plan in Workbook
Several 25 piece puzzles with 3-4 pieces switched ahead of time

Time: 12:31 p.m. - 1:30 p.m. (59 minutes)


Notes: Important key idea here is to ensure parents of children 13+ will go back and discuss transition with their child's medical providers after the training.

Sources: Region 4 Genetics, Care Coordination Workgroup, Coordinated Care Plan 2011 www.region4genetics.org
Lind, C., (2012, Sept 19) Durga's Toolbox, Durga Tool # 9: My Care Map, retrieved from <http://durgastoolbox.com/2012/09/19/durga-tool-9-my-care-map-or-the-picture-that-tells-a-thousand-words/>
The Medical Home Portal (2013) Transition to Adulthood, retrieved from <http://www.medicalhomeportal.org/living-with-child/navigating-transitions-with-your-child/transition-to-adulthood>



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Theme	Time	Discussion	Tools	Visual
Expanding Care Coordination	0:01	1. "The idea of building a Health Partnership and creating a team approach to caring for child has been a theme of today's training. By the end of this section parents will be able to identify key members of the child's care team, expand thinking beyond just medical providers and share how to facilitate communication between care providers. You will also understand the need to plan for your child's transition."		
Who Is On Your Care Coordination Team?	0:02	1. "We are going to start by thinking about "Who are the individuals that are part of your care coordination team?" By individuals clarify you mean role not actual name. 2. Go around room and ask participants to each name a few different people they may include on their child's care team. Record on flip chart.	<i>Round Robin Discussion</i> <i>Flip chart paper & markers</i>	

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Theme	Time	Discussion	Tools	Visual
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“Puzzled” Activity	0:10	<ol style="list-style-type: none"> 1. “Next we are going to do a team building exercise. This is a chance for you to work as a team to meet a goal.” (Puzzled is an exercise for participants to see that cooperation across real or perceived team boundaries can be beneficial (sometimes even crucial) to success) 2. Divide into 4 teams. Give each team a bag with a puzzle in it. Each bag is missing a few pieces and has a few of another team’s pieces. Do not disclose that the bags have been tampered with. Tell the participants that the goal is to complete the puzzle in less than 3 minutes. 3. Have them begin. If they ask for help, decline and encourage them to use the resources they have. Tell them, “All the pieces necessary to accomplish the goal are out.” 4. If they ask if they can work with other groups, say, “You know what your objective is; do what you need to do to achieve it.” 	4 Puzzles with several pieces of each mixed up	

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Theme	Time	Discussion	Tools	Visual
“Puzzled” Activity Debrief	0:10	<ol style="list-style-type: none"> Debrief with the following questions: <ul style="list-style-type: none"> What assumptions did you make at the beginning of this activity? Did you feel this was a competition? How did you react when you realized you did not have all the pieces you needed? How did you feel when other groups came offering pieces or asking for some of your pieces? Why is this similar to care coordination? Do you see the need for building a team and reaching beyond the team to work together? “Part of the exercise explored moving outside your team. When you think about your care coordination “team” you have built or are building, do you include anyone beyond a medical perspective? Now let us explore building your team beyond just medical.” “As you consider what we have talked about so far today, are there other individuals who should be part of your care coordination team?” Go around room and ask participants to each name a few different people you may wish to include on your child’s care team. Encourage them to think about people they may not have thought about before. 	<p><i>Large Group Discussion</i></p> <p><i>Round Robin Discussion</i></p>	 <p>Care Coordination: Empowering FAMILIES</p> <p>Who Else Should Be On Your Team?</p>  <p>Care Coordination: Empowering FAMILIES</p>


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Theme	Time	Discussion	Tools	Visual
Drawing A Care Map	0:18	<ol style="list-style-type: none"> 1. "As we identify the many different people on our care teams sometimes it is hard for us as well as others to understand what that looks like. This was the issue for a parent in Massachusetts, Cristin Lind, who was asked to speak to a group of primary care physicians about the complex medical needs of her son, Gabe. After being unable to put to paper the words to describe it, she started drawing a map. She put her son in the middle with his family around him and built outward from there." 2. "Today we are going to use her inspiration to draw our own care maps. The idea is to create a visual representation of your child and all the different people involved in his/her care. We are all surrounded by various people who work with us to care for our children. We are going to create a piece of art, a map, to remind us of this unrecognized structure that surrounds us". Show example you have created. 4. Allow 10 minutes to draw their care map. After 10 mins ask them to stop, reminding them this is just a start and they can take with them and add to at a later time. 5. Ask participants about themselves looking at their care maps. "In what ways could they use the map to share with the different people involved with their child?" 	<p><i>A piece of drawing paper 8"x11" for each participant</i></p> <p><i>Colored markers or pencils</i></p>	

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Theme	Time	Discussion	Tools	Visual
Coordinated Care Plan	0:07	<ol style="list-style-type: none"> 1. “An important issue to address next is communication and keeping everyone “on the same page” 2. Ask “what are some of the ways you share information or care plans with everyone?” 3. “One way of doing this it by using the Coordinated Care Plan. Unlike the EHI or care notebook which record historical information over time, the Coordinated Care Plan is intended to include the most up-to-date information about your child. It should be a “snapshot” of what is happening with your child now. It can...” <ul style="list-style-type: none"> • Be updated regularly • Include information from all of your child’s care plans • Describe your child’s goals, the role of each provider in helping your child reach those goals, and progress on each goal • Be shared with those providing care for your child 4. “Take a moment to look over the Coordinated Care Plan and think about how you could use this to improve communication with the people in your child’s life.” 	<p><i>Large Group Discussion</i></p> <p>Coordinated Care Plan in workbook</p>	

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Theme	Time	Discussion	Tools	Visual
Transitions	0:05	<ol style="list-style-type: none"> 1. "As you begin to expand your thinking on who should be included on your care coordination team, start thinking about the transition to adulthood for your child and the possible shift in team members. Children and families experience many transitions, large and small, over the years." 2. "Some predictable transitions occur such as moving from early intervention to preschool, from preschool to kindergarten, when they approach adolescence and when children move into adulthood. Other transitions children make may include moving into new programs, or working with new agencies or providers." 3. "Transitions involve changes; adding new expectations, responsibilities and resources and letting go of others. As a parent with a child who may have special health care needs, a disability or developmental delays, you may be caught up in day to day survival. You may ask "How can I think about tomorrow when I'm just trying to make it through today?" " 4. "But when those moments come when you can catch your breath it may be helpful to be aware of those transitions and allow yourself to think about the future. How can you prepare yourself?" 		 <p>Transition To Adult Care</p>

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SECTION V ORGANIZING INFORMATION (1:31 p.m. – 1:45p.m.)

Overview: Organizing Information provides an opportunity to share organization techniques for managing care coordination.

Outcomes: Participants will:
Identify two different methods of organizing information

Theme	Time	Discussion	Tools	Visual
Ways To Organize	0:10	<ol style="list-style-type: none"> 1. "Web based tools are one way to organize. One helpful tool available on the web is <i>My Family Health Portrait</i> by the U.S. Surgeon General. It allows you to collect and store your family medical history to share with your child's physician." 2. "Some people find using Smart Phone Apps to be very helpful. What are some apps you have used that helped you get organized? Here is a site that you can go to that lists many different apps under Health that you can use to help you keep track of information." 3. "Some parents find it helpful to build a care notebook. There are a lot of good resources available to help you build a care notebook. One website that has links to multiple types of care notebooks is the National Center for Medical Home Implementation." Explore the link and demonstrate the various types of forms parents can use to build a care notebook. 	Internet access	

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SECTION VI NAVIGATING INSURANCE (1:46 p.m. – 2:30 p.m.)

Overview: This section on Navigating Insurance explores the basics of understanding coverage, the impact of the Affordable Care Act, tips for resubmitting a claim, and resources to guide you through an appeal process.

Objectives: Participants will:
Have increased knowledge of the Affordable Care Act as it applies to CYSHCN
Identify one resource that can help them navigate insurance
Identify one technique for dealing with denied insurance claims

SAMPLE

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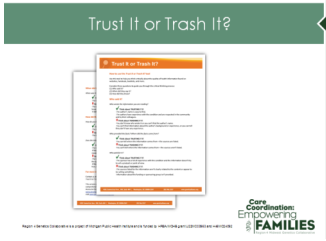
Theme	Time	Discussion	Tools	Visual
Understanding Your Coverage	0:05	<ol style="list-style-type: none"> 1. "Obtain a copy of your health care plan. It is often available online, from your employer that provides the coverage, or via mail by contacting your provider. A table may be available to explain coverage however it is beneficial to read actual contract of coverage." 2. "Look at specifics in contract language including "Prior Authorization" and "Medical Necessity" paying attention to if/or and if/and. Review Non-Covered Services and Exclusions. Information may be in several places and services may have different names." 3. "Review your explanation of benefits. They may be available online or mailed after claim is processed by your insurance. This shows any discounts you receive, what is covered, and patient responsibility. The EOB should pair up with bill." 4. "Maximize your benefits- seek out other ways to get additional coverage/benefits. Two specific examples: www.Benefits.gov and www.InsureKidsNow.gov Important for families to know there may be programs they are eligible out there that they can apply for to help, or to find additional coverage. May be eligible for Children's Special Health Care, Medicaid, SSI, Waiver programs, etc. When in doubt...APPLY!!" 	Internet access	

SECTION VII FINDING RELIABLE RESOURCES (2:46 p.m. – 3:30 p.m.)

Overview: This section addresses what to consider when finding resources, in particular on the web. Participants will learn how to vet resources by considering a set of basic questions. The section also explores where to find local resources.

Objectives: Participants will:
Identify three key concepts for evaluating resources

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<p>"Trust it or Trash it" Tool</p>	<p>0:07</p>	<ol style="list-style-type: none"> 1. "One of the leading ways parents search for information is on the web. The old adage "You can't believe everything you read" plays true when obtaining information from the web." 2. "A good resource for evaluating information is published by the Genetic Alliance and included in your binder. The tool is called: Trust It or Trash It." 3. Walk thru Trust it or Trash it with group. Ask them for examples of times they questioned information they found on the web. 4. "This tool can be helpful not just for evaluating the web. It gives you the questions that can be applied to all types of information, not just websites. What are other times you could use this tool?" 	<p>"Trust It or Trash it" handout in workbook</p>	
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SECTION VIII FROM COPE TO HOPE (3:31 p.m. – 4:10 p.m.)

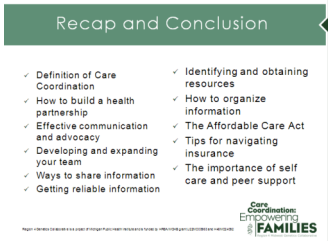
Overview: This section is to examine the areas of being able to cope, assessing self-care, and the value of peer support. Through self-awareness, parents may find that they travel a spectrum of trying to cope to finding joy and hope and it likely ebbs and flows.

Objectives: Participants will:
 Recognize the importance of self-care
 Understand the value peer support

Theme	Time	Discussion	Tools	Visual
Self-Care, <i>continued</i>	0:05	<p>1. "Lowering stress can change the way you handle stressful situations. The National Association for the Young Child provides advice to reduce stress and beat burnout. We feel these are great ideas for parents"</p> <ul style="list-style-type: none"> • Do Something you Enjoy • Get Support from other Parents • Exercise Regularly • Eat a Healthy Diet • Get Enough Sleep • Adjust Expectations • Put Yourself First • Ask for Support When You Need It • Practice Stress Relief Techniques • Get Inspired <p>2. "What are other ways you can beat stress and take care of you? Explore how to make self-care happen. Self-care needs to be more than a wish. Take a moment and think about what gives you energy. Make sure activity is healthy for <u>YOU!</u> Self-care is about nurturing you not engaging in behaviors that are temporarily distracting but a drain on your resources." Share an example such as getting an expensive manicure may feel good but drain limited resources. A bubble bath or walk alone may feel just as nice.</p>	<i>Large Group Discussion</i>	 <p>Self-Care Activities</p> <ul style="list-style-type: none"> ✓ Do something you enjoy ✓ Get support from other parents ✓ Exercise regularly ✓ Eat a healthy diet ✓ Get enough sleep ✓ Adjust expectations ✓ Put yourself first ✓ Ask for support when you need it ✓ Practice stress relief techniques ✓ Get inspired <p>Care Coordination: Empowering FAMILIES</p>

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RECAP (4:11 p.m. – 4:30 p.m.)

Theme	Time	Discussion	Tools	Visual
Recap Topics	0:03	<ol style="list-style-type: none"> 1. "Hopefully all the pieces are coming together for you now. We are going to recap today's topics and what we learned." 2. Today we covered: <ul style="list-style-type: none"> • Definition of Care Coordination • How to build a health partnership • Effective communication and advocacy • Developing and expanding a care coordination team • Ways to share information between providers • How to Identify and obtain resources • Organizing Information • Discovering Reliable Information • Tips for Navigating Insurance • The importance of self-care and peer support 3. "Our hope is that you now have a better understanding of how collaboration benefits your child and your family through care coordination." 4. Visit Parking Lot if any items and ask if any additional questions for the day. 		 <p>Recap and Conclusion</p> <ul style="list-style-type: none"> ✓ Definition of Care Coordination ✓ How to build a health partnership ✓ Effective communication and advocacy ✓ Developing and expanding your team ✓ Ways to share information ✓ Getting reliable information ✓ Identifying and obtaining resources ✓ How to organize information ✓ The Affordable Care Act ✓ Tips for navigating insurance ✓ The importance of self care and peer support <p>Care Coordination: Empowering FAMILIES</p>

CONCLUSION