

# Advancing Team-Based Care

## Learner Guide Session 1



# Share the Care: Part 1

**Goal:** Determine who is currently responsible for primary care functions, then consider whether someone else on your team might be able to perform these functions.

## Part 1: Who Does it Now?

1. Place a checkmark in the column that matches who is currently performing each of these tasks in your clinic. If more than one person performs the tasks, pick whoever is mainly responsible.
2. Add up the checkmarks vertically.

## Part 1: Discussion

- How many tasks fall under each person?
- Are there people with too many responsibilities?
- Were there times where members of your team thought different people were assigned to a particular task?
- Are there people who are underutilized and could lend support to other team members?



## Share the Care Activity: Who's doing it now?

Tasks: Diabetes Routine Visit	No one	Front office	MA	RN	Behavioral Health Clinician	PCP	Health Coach	Other: such as PharmD
Outreach & scheduling								
Chart scrub								
Insurance verification								
Secure records from specialists or hospital visits								
Obtain patient questions / priorities for visit								
Assess patient understanding of diabetes & diabetes management								
Review each medication to determine how/whether they are taking it								
Ensure patient is up to date on routine lab work								
Discuss lab results with patient								
Provide immunizations if not up to date								
Screen patient for social needs, such as food insecurity								
Connect patient with community-based resources as needed								
Talk with patient about health eating and physical activity								

## Share the Care Activity: Who's doing it now?

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Screen patient for depression/anxiety or other behavioral health concerns								
Provide support for patient experiencing depression / diabetes distress								
Review glucometer readings with patient								
Obtain vitals (height, weight, BMI, BP)								
Retake blood pressure if high								
Conduct diabetic foot exams								
Refer for diabetic eye exams (or take in-house images)								
Make changes in medications as needed								
Help patient create self-management goal to improve their health								
Follow up with patient about changes in medications/treatment								
Follow up with patient about progress toward personal goal								
Connect patient to peer support								
Other:								

# Share the Care: Part 2

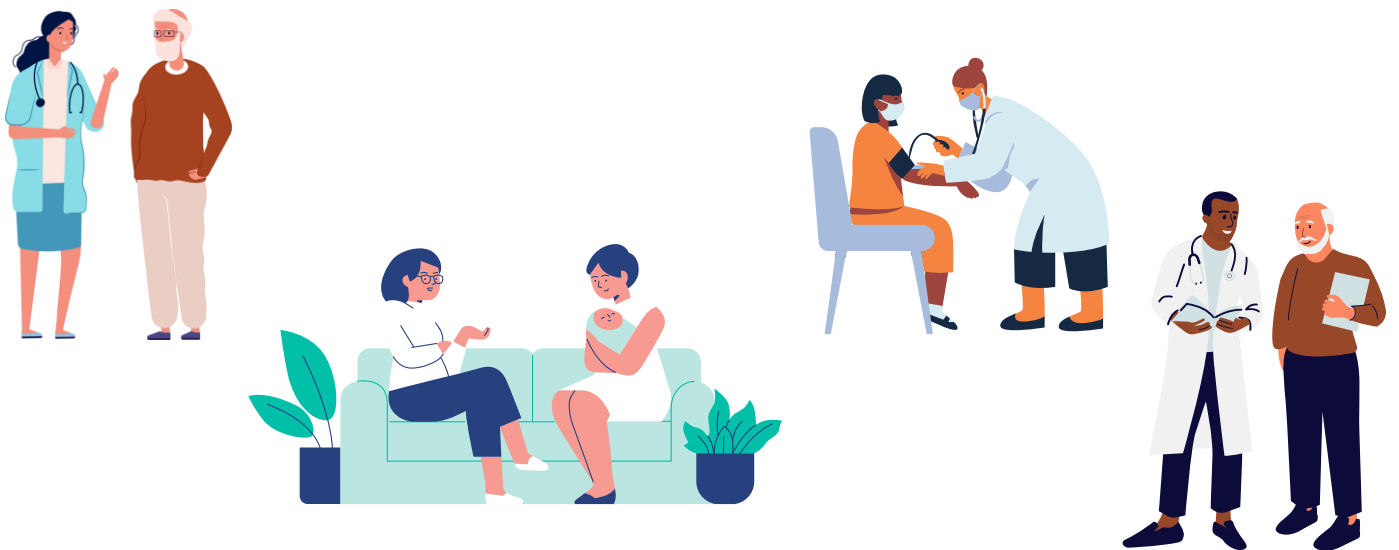
**Goal:** Determine who is currently responsible for primary care functions, then consider whether someone else on your team might be able to perform these functions.

## Part 2: Who could do it?

1. After reviewing your “Who does it now?” responses, change your answers to indicate who could complete the task.
2. Add up the checkmarks vertically.

## Part 2: Discussion

- What do you observe?
- Stoplight reflection:
  - **Red:** Is there anything you would change or stop doing based on this activity?
  - **Yellow:** Is there anything where you need to gather more information or where you’d like to learn more?
  - **Green:** Is there anything you want to start doing based on this activity?



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