

## SAMPLE AGENDA

### Integrated Care Certification

Time	DAY 1 - Activity		Organization Participants
	Reviewer 1	Reviewer 2	
8:00 – 8:30	<b>Opening Conference</b> <ul style="list-style-type: none"> <li>• Introductions</li> <li>• Overview of certification program (surveyors)</li> <li>• Review organization’s goals and expectations for the on-site visit (organization)</li> <li>• Review visit agenda and logistics (e.g., sites included in visit, travel to sites, timing of group meetings)</li> </ul>		
8:30 – 8:45	<b>Orientation to Organization’s Integrated Care Program</b> <p>The organization is asked to provide a high-level overview of their integrated care program in either a 10-15 minutes presentation or in discussion that focuses on the following:</p> <ul style="list-style-type: none"> <li>• Vision and planning for patient-centered, integrated care, treatment and services</li> <li>• Scope of care, treatment and services included in the integrated care program (i.e., hospitals and ambulatory clinics, primary care and specialty care physicians, medical groups, urgent care, convenient care)</li> <li>• Patient populations that integrated care program covers</li> <li>• Program structures and processes that support the provision of patient-centered, clinically integrated care</li> <li>• Leaders and staff involved in the design, development and operations of the integrated care program</li> <li>• Current program status, that is, what is currently in place that reviewers will see and hear about from staff throughout the organization’s integrated care program</li> <li>• Clinical integration related initiatives that are in design, planning, development, and testing phases</li> </ul>		
8:45 – 9:30	<b>Care Integration Design and Planning</b> <p>Discussion will build upon the introduction from the previous activity and explore in more depth the following topics:</p> <ul style="list-style-type: none"> <li>• Strategic planning process</li> <li>• Program leadership</li> <li>• Ambulatory and hospital care alignment efforts</li> <li>• Program design influences (e.g., community needs assessments, clinic and physician office patient population, patient population risks and outcomes, evidence-based information)</li> <li>• Integration incentives, influencers <ul style="list-style-type: none"> <li>▪ Group purchasing/negotiation power</li> <li>▪ Technology planning, affordability, and access (e.g., hospital IT support with equipment purchases,</li> </ul> </li> </ul>		

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Time	DAY 1 - Activity		Organization Participants
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	maintenance, security <ul style="list-style-type: none"> <li>▪ Service availability and accessibility (e.g., centralized scheduling, urgent care or convenient care)</li> <li>▪ Medical specialty resources</li> <li>▪ Access to patient-centered care resources (e.g., interpreter services, translated written materials)</li> <li>▪ Patient health and self-management education resources</li> <li>▪ Resources to monitor emerging trends</li> <li>▪ Population/community health data</li> <li>▪ Facilitating access to interdisciplinary care, treatment and service needs of patients</li> <li>• Communication planning and processes</li> <li>• Performance improvement related to patient-centered, integrated care program               <ul style="list-style-type: none"> <li>▪ Patient involvement</li> <li>▪ Focus of priorities and activities</li> <li>▪ Scope of performance improvement activity— that is, does it span the inpatient and outpatient setting</li> </ul> </li> </ul>		
9:30 – 10:00	<b>Tracer Activity Planning Session</b>		
10:00 – 12:30  Includes travel time to ambulatory sites	<b>Individual Tracer Activity</b>	<b>Individual Tracer Activity</b>	
12:30 – 1:00	Lunch		
1:00 – 3:00	<b>Individual Tracer Activity</b>	<b>Individual Tracer Activity</b>	
3:00 – 4:00	<b>Multi-Disciplinary (Interdisciplinary) Group Interview</b> <i>(Note: This could be an already established group or committee of representatives that lead or guide clinical activities and priorities of the integrated care program.)</i>  Discussion will focus on how clinical integration manifests on the front-line. Surveyors and participants will explore <ul style="list-style-type: none"> <li>• Processes supporting clinical integration (e.g., information sharing, hand-offs between providers and settings, facilitating patient transitions)</li> <li>• Role of the multi-disciplinary group</li> <li>• Patient-centric interdisciplinary team composition and planning</li> <li>• Coordination and collaboration between settings, services and care providers</li> </ul>		

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Time	DAY 1 - Activity		Organization Participants
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	<ul style="list-style-type: none"> <li>• Influence of different disciplines on the program design</li> <li>• Patient and family participation in treatment planning</li> <li>• Patient and family access to the team, to ambulatory services</li> </ul>		
4:00 – 4:30	<b>Reviewer Team Meeting / Planning Session</b>		

Time	DAY 2 - Activity		Organization Participants
	Reviewer 1	Reviewer 2	
8:00 – 8:30	<b>Daily Briefing</b>		
8:30 – 11:00	<b>Individual Tracer Activity</b>	<b>Individual Tracer Activity</b>	
11:00 – 12:00	<p><b>Patient Group Interview</b> (If possible; or surveyors will continue tracer activity)</p> <p><i>Note: This could be an established group or patient members of other organization committees, such as: patients who are part of a support group, patients scheduled for monitoring and education group appointments, patient relations committee members, patient advisory committee, or any other organized patient and family groups.</i></p> <p>Discussion topics include:</p> <ul style="list-style-type: none"> <li>• Describe your experiences moving between hospital and ambulatory care (doctor visit, specialty clinic visit). Did you have any concerns?</li> <li>• Does the access you have to doctors or your other care team members meet your needs?</li> <li>• When you have questions related to medications, or need to clarify instructions you received or concerns about your health and treatment, whom do you call?</li> <li>• How do you communicate with your doctor or other care team members (phone, email, text, patient portal)?</li> <li>• Have you been involved in planning your care and treatment? How? What does the doctor or care team expect of you?</li> </ul>		
12:00 – 12:30	Lunch	Lunch	

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Time	DAY 2 - Activity		Organization Participants
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12:30 – 2:00	Individual Tracer Activity	Individual Tracer Activity	
2:00 - 3:00	<b>Program Performance Improvement</b> Discussion with program representatives will include topics such as: <ul style="list-style-type: none"> <li>• Integrated care program’s priorities for performance improvement</li> <li>• Efforts to measure performance across health care settings</li> <li>• Outcomes of interest to employed and community physicians</li> <li>• Outcomes of interest to other ambulatory care partners</li> <li>• Performance measurement already taking place that relates to patient-centered, integrated care program efforts</li> <li>• Patient satisfaction data</li> <li>• Physician and care team member performance information needs</li> </ul>		
3:00 – 4:00	<b>Reviewer Report Preparation</b>		
4:00 – 4:30	<b>Exit Conference</b>		

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