

Implementing Case
Management in Primary
Care: Findings and
reflections from a multi-
province SPOR Study

PIHCIN Seminar – March 22, 2022



PriCARE
Partners for Patients First

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Funders and Partners



Réseau sur les innovations en soins de santé de première ligne et intégrés



Primary and Integrated Health Care Innovations Network



la fondation de ma vie



LE COLLÈGE DES MÉDECINS DE FAMILLE DU CANADA



BRIC-NS Pre-Funding Support:

- Help put **multi-disciplinary team** together
- Help find **matched funding**

BRIC-NS Post-Funding Support:

- Help hiring **project/research coordinator**
- Help identify **patient partners**
- Help identify **clinics** with health system partners

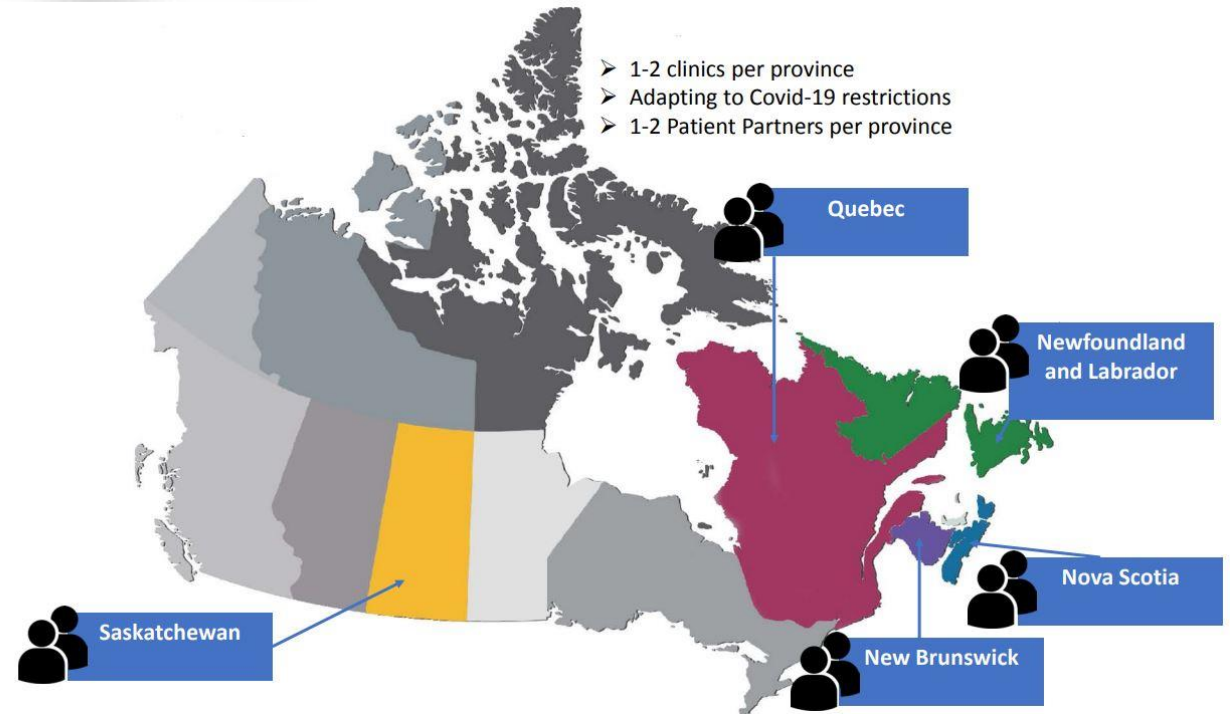


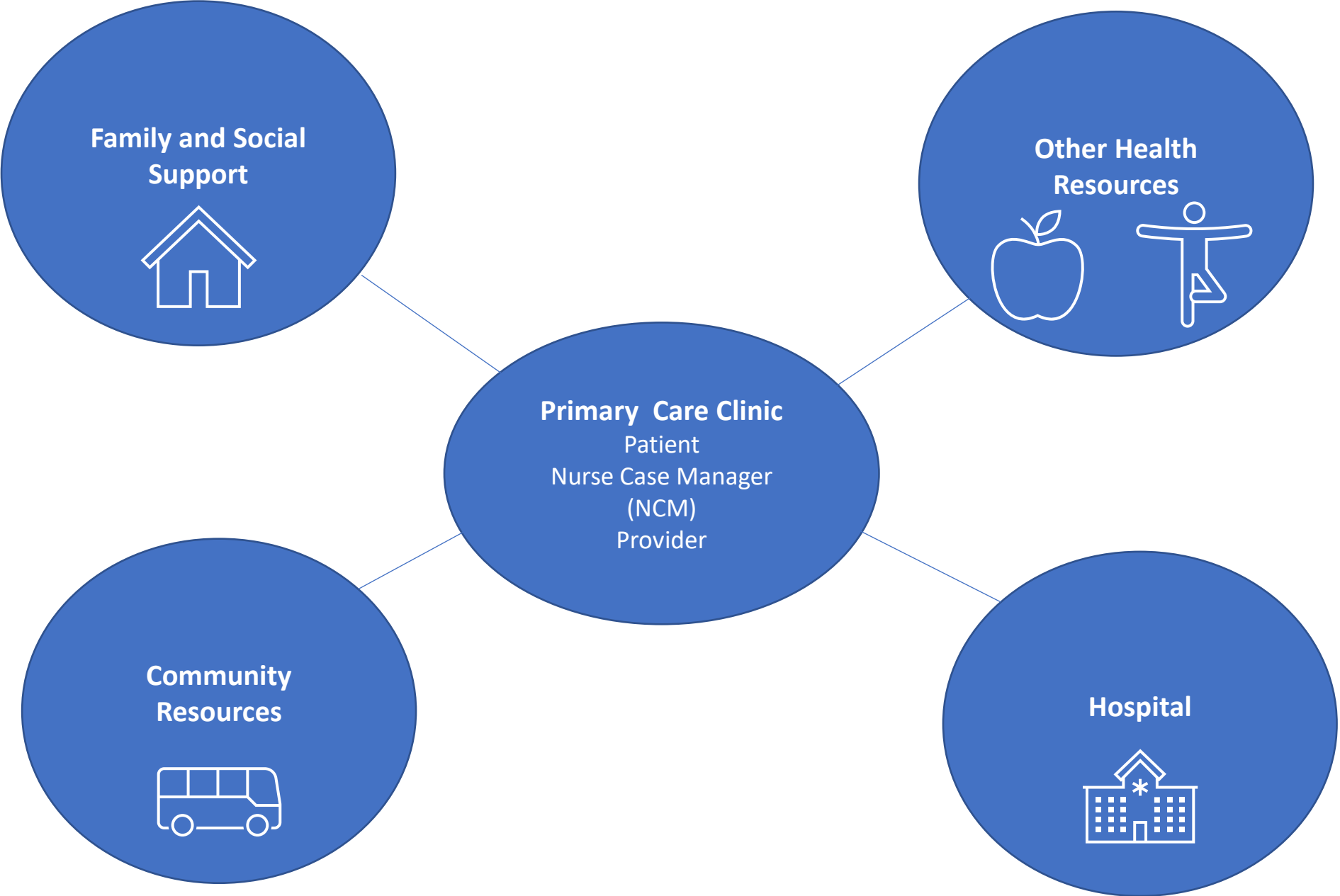
Building Research for Integrated Primary Healthcare

Presentation Aims

- The PriCARE Study & Case Management
- Implementation Study Methods
- Implementation Findings
- Patient Partner Reflections
- Global Reflections

- **Nurse-led** case management intervention (CMI)
- Patients with **one or more chronic conditions** and **complex care needs**
- Frequent users of the **healthcare system**
- **Bi-lingual, multi-provincial, multi-jurisdictional**





Case Management (CM) Steps

Patient-centred approach

Identification of patients with complex healthcare needs

Assessment of the patient's needs and preferences

Development and maintenance of an "individualized services plan" (ISP)

Coordination of services among health and social services partners

Provision of education and self-management support for patients and families

Study Phases



Phase 1

Implementation of Case Management

Phase 2

Realist Evaluation of Case Management

Phase 3

Scalability of Case Management

Implementation Steps

CM Training

3hr case
management
module

Research Orientation

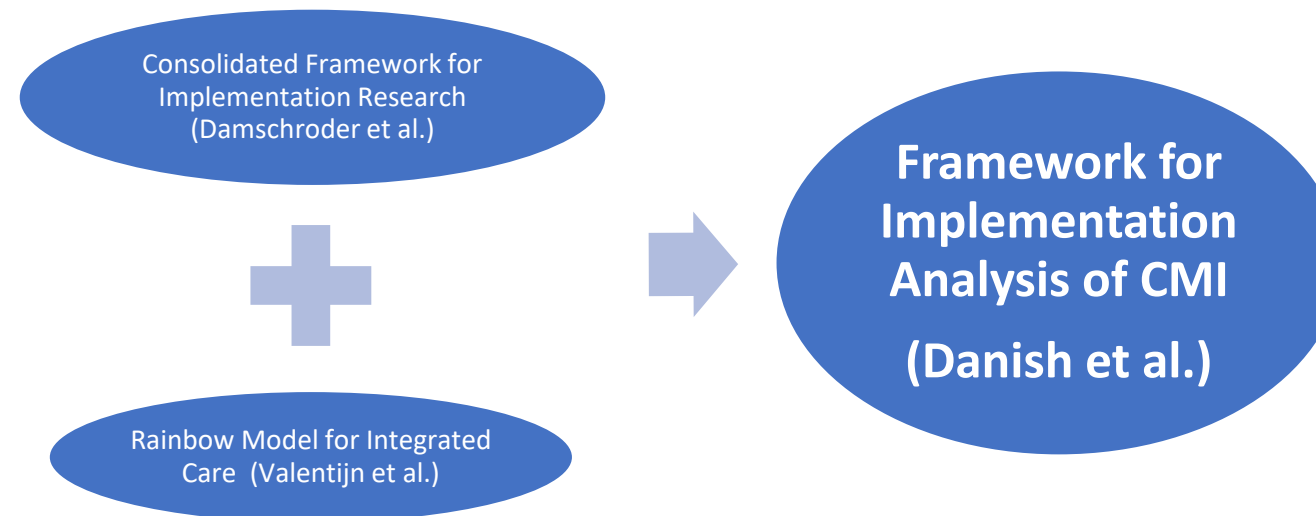
Consent
process,
questionnaires,
interviews

Peer Support and CM Expert

Patient Partner
support
opportunities

Implementation Study Design

Conceptual Framework for a Qualitative Mixed Case Study



¹Danish A, Chouinard MC, Aubrey-Bassler K, Burge F, Doucet S, Ramsden VR, et al. Protocol for a mixed-method analysis of implementation of case management in primary care for frequent users of healthcare services with chronic diseases and complex care needs. *BMJ Open*. 2020;10(6):e038241.

²Damschroder LJ, Aron DC, Keith RE, Kirsh SR, Alexander JA, Lowery JC. Fostering implementation of health services research findings into practice: a consolidated framework for advancing implementation science. *Implementation Science*. 2009;4(50)

³Valentijn PP, Schepman SM, Opheij W, Bruijnzeels MA. Understanding integrated care: a comprehensive conceptual framework based on the integrative functions of primary care. *Int J Integr Care*. 2013;13:e010.

Implementation Study Methods

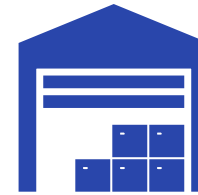
Data Collection

1. Semi-structured **individual and group interviews**
2. **Field notes** by provincial research coordinators

Implementation Study Sample

Purposeful sampling recruited:

- **6** primary care clinics in **4** provinces, each considered a case
- Key informants in each clinic – health services managers, nurse case managers (NCM), family physicians, and other healthcare providers



Implementation Study Sample

Individual interviews:

- NCM (n=10)
- Health services managers (n=5)
- Family physician and other healthcare providers (n=4)

Six focus groups:

- Family physicians (n=20)
- Other healthcare providers (n=8)

Implementation Study Demographics (self-reported)

Sex of Respondent:

Female = 42 Male n=6

Age Range:

25-74

Professional experience – years:

1-42 (mean=13)

In clinic – years:

1-32 (mean=8)

Implementation Study Data Analysis

Participatory mixed thematic analysis process:



Developed codebook



Coded transcripts and field notes



Synthesized and discussed emerging themes



Organized themes in a cross-case table



Revised and validated final themes

Implementation Facilitators

- **Provider engagement** a key element to successful case management (CM) implementation
- **Strong managerial leadership, engagement and support** with introduction to CM & implementation **planning amongst clinic staff**
- **Trained, skilled and experienced** nurses as case managers supports positive implementation
- **Capacity development** including team meetings and debriefs

Implementation Barriers

- **Provider concerns about** time commitment, increased workload, program need
- **Lack of or varying access to medical records** and charts
- Patient **recruitment** challenges
- Anticipated challenges with **planning** and **organizing collaborative care** (ISP)
- **Challenges anticipated** with more **complex patients'** motivation, care access and health literacy

Patient Partner Reflections

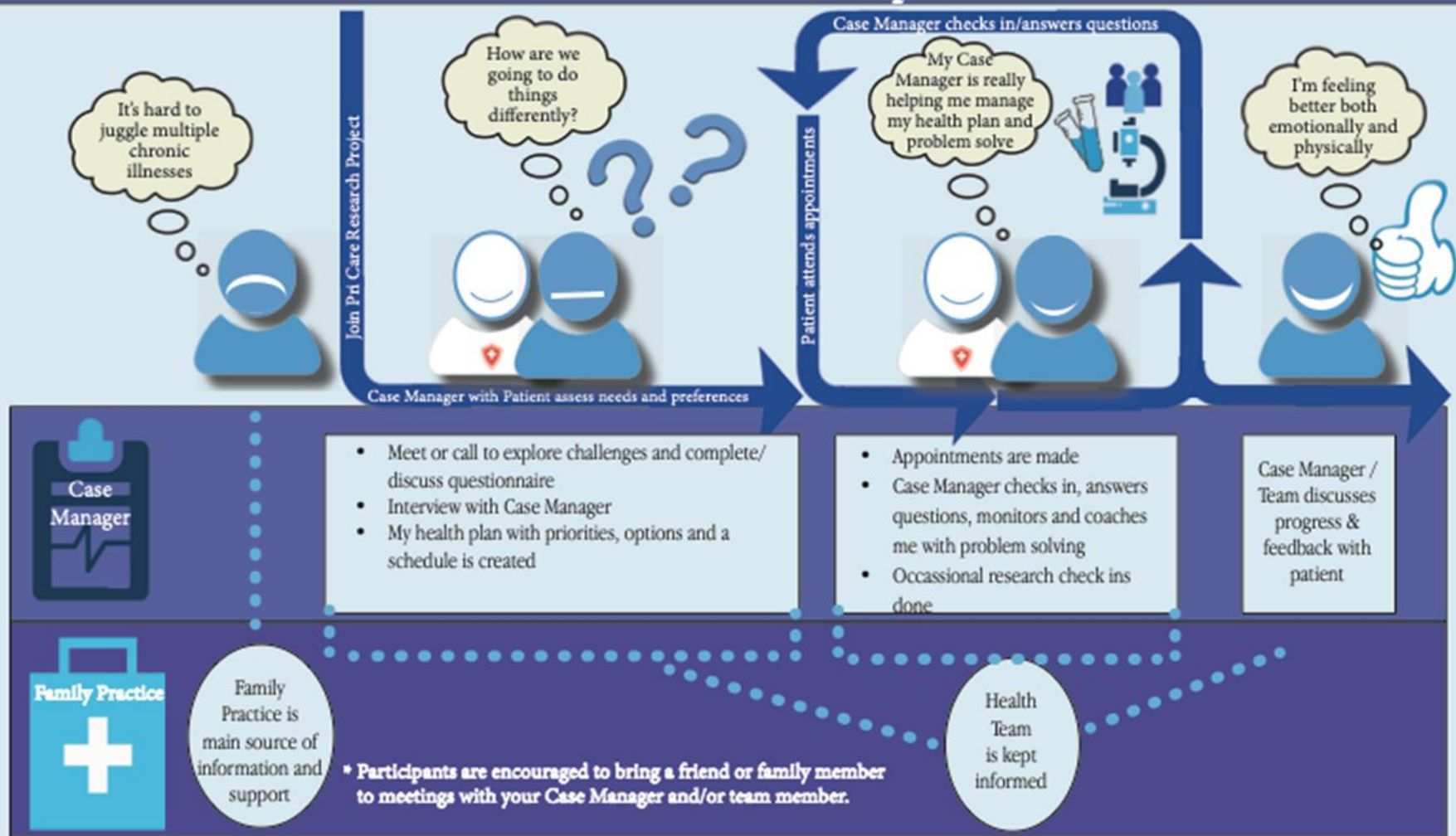
Patient Partners can help overcome barriers:

- **Provider concerns** – PPs can reflect on lived experience and discuss how **CM can improve health outcomes**
- **Implementation challenges** – PPs can support **recruitment** of patients and NCM/patient **relationship building**

Patient Partners can support facilitators:

- **Trained, skilled and experienced** nurses as case managers – PPs can **offer insight** with training and patient relationship building

PriCARE - Patient Map



My Case Manager's Name: _____

Notes: _____

Telephone #: _____

Email: _____

File #: _____



PriCARE Research Checklist

A member of the research team will call you for:

Date Completed

- Questionnaire when you begin study (15-30 minutes) _____
- Questionnaire at 6 months into study (15-30 minutes) _____
- Questionnaire at 12 months at end of study (15-30 minutes) _____

- Interview at 3 months into study (60-90 minutes) _____
- Interview at 12 months at end of study (60-90 minutes) _____

Notes: _____

Global Reflections



Front end time/workload is key to successful CM implementation



Clinic/NCM and researcher relationship evolves over time



Research team relationship evolves over time



Actualizing SPOR guidelines

Thank you!

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