



PROGRAM SPOTLIGHT

GROWING TO LOVE PROGRAM MONITORING

Tools Available to Design and Implement Electronic Monitoring System for Patient Encounters – the Alivio Medical Center Experience

Also known as process evaluation, program monitoring consists of the systematic evaluation of 1) program coverage, or the extent to which the program is reaching its target population; 2) program delivery, or whether the services provided by the program are, in fact, consistent with design specifications; and 3) the resources expended to conduct the program (Rossi, Lipsey, and Freeman, 2004). In practice, program monitoring helps ensure that a program is implemented as designed.

This article describes the design and implementation of an electronic monitoring system at Alivio Medical Center in support of its ¡Mi Salud es Primero! program. Whether you may be interested in creating a similar system or adapting our model for your needs, **Peers for Progress is eager to share tools** we've developed and lessons learned – see box at the end of this article.

Diabetes Self-Management through Peer Support and Outreach with the Patient-Centered Medical Home

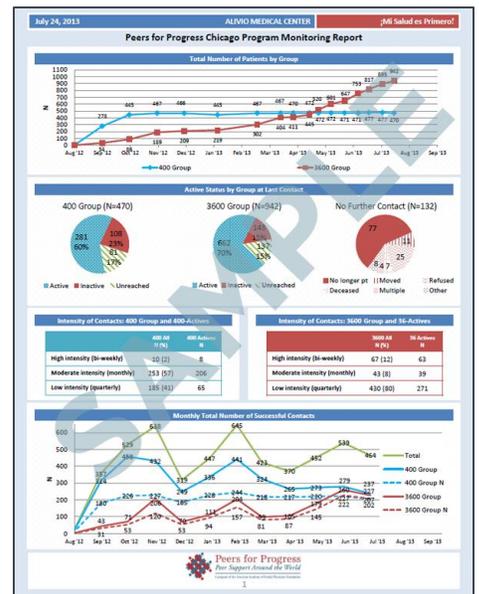
In 2011, Peers for Progress was awarded a grant from the Bristol-Myers Squibb Foundation's *Together on Diabetes Initiative* to demonstrate and evaluate the ability of a comprehensive approach to diabetes management based in a primary care patient-centered medical home (PCMH), and emphasizing peer support and community outreach activities to improve health outcomes of the target population (4,000 low-income Latinos with diabetes).

The project is being implemented at Alivio Medical Center in Chicago, IL, a federally-qualified health center dedicated to providing quality, cost-effective health care to the Latino community. Furthermore, two partners are lending their expertise to support this project. *TransforMED* is assisting Alivio with PCMH enhancement and practice change, while the *National Council of La Raza* is assisting in resource development and nationwide dissemination.

¡Mi Salud es Primero!

Among the 4,000 patients with diabetes at Alivio, a research sample of 400 high needs patients were selected to receive intensive, ongoing peer support. The *Compañeros en Salud* (Community Health Workers; promotores) were trained in flexible, nondirective approaches to engage patients in peer support, which include low demand initial contacts, telephone check-ins, and ongoing availability. The remaining 3,600 patients are receiving regular care, which includes quarterly visits, care plans, diabetes self-management education, and support groups.

Compañero en Salud Contact Note



Sample Monitoring Report

The Alivio Diabetes Self-Management Education and Support Team:

- 10 Primary Care Providers
- 4 Registered Nurses
- Certified Diabetes Educator
- Diabetes Trainer
- Medical Assistants
- ¡Mi Salud es Primero! Manager and Coordinator
- 9 Compañeros en Salud

Building a Three-Component Program Monitoring System

Component 1:

Contact note to document intervention delivery

To ensure that the ¡Mi Salud es Primero! program was reaching the target population and that compañeros were properly delivering the intervention, Alivio Medical Center needed to monitor the compañeros' work and track patient interactions. Peers for Progress and Alivio staff worked closely to develop a contact note to document patient encounters (top image above). The Alivio staff ensured that compañeros were appropriately trained to collect data using this form.

Component 2:

Access database as an interim solution for electronic data entry and management

Inspired by Alivio's transition to a PCMH, the team agreed that data collected on paper forms should be entered into an electronic database to allow ease of access and frequent program monitoring. However, delays in the implementation of Alivio's new electronic medical record system meant that data would be piling up for months and compañeros were understandably unhappy about the possibility of entering in a backlog of forms. As an interim solution, Peers for Progress developed an Access database and Alivio trained compañeros to enter data into this new system.

Component 3:

Monitoring reports to help interpret results, celebrate accomplishments, and identify areas for improvement

The first report from this database was presented in late February. This version presented the data in tabular form but feedback from the compañeros indicated that they were having trouble interpreting the results in this format. Peers for Progress responded to this need by creating a visual dashboard (bottom image above). The first page shows data on patient engagement over time and the second page shows type of support provided to patients, assistance and self-management next steps, and goal-setting. The reports are presented every two weeks to the entire team at Alivio, NCLR, and TransforMED. The staff at Alivio then shares the data with the compañeros. The reports have been praised by the executive leadership, physicians, and compañeros alike.

Prior to the reports, the Alivio staff didn't know which patients the compañeros were reaching. With each report, they could tell that the compañeros were reaching more and more of the high needs group, but it was apparent that more targeted efforts were required to reach the general population. In response, the staff began setting up information tables in the clinic to engage patients and their families, which led to greater engagement with the group of 3,600 patients.

At a [summit of Together on Diabetes grantees](#), one of the compañeros from Alivio described how the visual dashboard transformed her view of program monitoring. Initially, the lack of rapid reporting made it difficult for compañeros to see the benefit of meticulously collecting and entering so much data. However, once they saw the reports and began using the data to improve their services, the reports became a source of power that demonstrated the value of the compañeros and their work. Prior to the reports, few people at Alivio knew exactly what the compañeros were doing and how many people they were reaching. The reports were invaluable in winning organizational buy-in from physicians and the executive leadership.

Through our close collaboration, Peers for Progress and Alivio Medical Center were able to design a program monitoring system that's comprehensive, low-resource, user-friendly, and responsive to the needs of program staff. Beyond its value as a tool for program monitoring, the reporting has been enthusiastically embraced by the compañeros as a source of validation and empowerment.

Tools and Resources Available

You can obtain a fully customizable Access database, SPSS codes, and visualization package to use as templates for your programs. If you would like to explore whether the monitoring system at Alivio could be adapted to fit your program needs, Peers for Progress would be glad to provide the necessary technical assistance. Furthermore, our staff is available to help you establish a workflow for generating visual dashboards from your raw data.

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