



June 22, 2015

The Honorable Orrin Hatch
Chairman, Senate Committee on Finance
104 Hart Senate Office Building
Washington, DC 20510

The Honorable Ron Wyden
Ranking Member, Senate Committee on Finance
221 Dirksen Senate Office Building
Washington, DC 20510

The Honorable Johnny Isakson
United States Senator
131 Russell Senate Office Building
Washington, DC 20510

The Honorable Mark Warner
United States Senator
475 Russell Senate Office Building
Washington, DC 20510

Mr. Chairman, Ranking Member Wyden, and Senators Isakson and Warner:

We are writing on behalf of the Eldercare Workforce Alliance (EWA), which is comprised of 31 national organizations united to address the immediate and future workforce crisis in caring for an aging America. Following, please find our responses to the May 22, 2015 Senate Committee on Finance open letter to the health care community for input on recommendations and thoughtful policies based on rural world experience and data-driven evidence that will improve care for Medicare beneficiaries with chronic conditions. We greatly appreciate the Committee's attention to these issues and especially its formation of a workgroup to further analyze current law, discuss alternative policy options, and develop bipartisan legislative solutions.

Indicatives aimed at improving care coordination are especially timely. The prevalence of multiple chronic conditions and functional impairment within the aging population is increasing. Older individuals with multiple chronic conditions need high quality care that coordinates health needs with any needed long-term services and supports.

Within the next 20 years, one in five Americans will be over age 65 and today, among Americans aged 65 years and older, as many as three out of four persons have multiple chronic conditions. Yet, there is a critical workforce shortage—of both health care professionals and direct care workers—that are adequately prepared to care for older adults.ⁱ It is estimated that by 2030, 3.5 million additional health care professionals and direct care workers will be needed.

We would like to stress to the Committee that care coordination is different from disease management. Care coordination takes a holistic approach to coordinate care and supportive services for individuals overall, rather than focusing on a particular disease. We encourage the committee to avoid programs that do not take a holistic, person- and family-centered approach to providing care. Additionally, we believe the Committee's objectives can only be achieved if quality – quantified by results such as reduced hospitalization and improved quality of life – remains a major focus of any policy changes. To achieve this goal, there need to be quality metrics for practitioners and providers that promote quality care and recognize the complexity of caring for older adults with multiple chronic conditions, including individuals with cognitive impairment, and support the need to work collaboratively with family caregivers.

In 2012, EWA along with the National Coalition on Care Coordination (N3C) developed an issue brief on care coordination which identifies effective elements of care coordination, including models that provide person- and family-centered, team-based, and evidence based care. In order to realize the full potential of care coordination to improve the quality of care – especially for the aging population – EWA and N3C made the following overarching recommendations for policy changes and future research and believe they are essential for the Committee’s work on chronic care:

- Encourage payment and delivery models that support improved coordination and communication among members of the interdisciplinary team of providers, direct care workers, the individual, family caregivers and others chosen by the individual.
- Strengthen family caregiver capacity to manage care, as appropriate, and provide support to the individual, as well as assess family caregiver capacities, needs and coping ability.
- Ensure that the individual and family caregiver are involved in shared decision-making at each step of care and transitions between settings.
- Target the highest-risk individuals, especially those at risk of hospitalization.
- Develop, support, and use technology, such as health information technology (HIT) and interoperable electronic health records (EHRs) to support effective care coordination and individual and family caregiver engagement. Encourage policies that will enable individuals, family caregivers, and providers to use this technology.
- Craft policies which ensure efficiency, transparency, individual self-determination and safeguards, while supporting access to high quality, coordinated care.
- Promote care coordination models that emphasize care coordination across disciplines and settings of care, including long-term care and other non-medical settings.

We would now like to address and provide evidence based models for these issue areas, which outline specific policy categories the Committee plans to consider as part of its chronic care reform efforts:

2. Transformative policies that improve outcomes for beneficiaries living with chronic diseases either through modifications to the current Medicare Shared Savings ACO Program, piloted alternative payment models (APMs) currently underway at CMS , or by proposing new APM structures;

Care coordination is centrally important for the success of Medicaid managed care models in place in an increasing number of states, as well as Patient-Centered Medical Homes, and Accountable Care Organizations.

Piloted Alternative Payment Models

In 2011, the Alliance issued a [comprehensive list of principles](#) in designing and implementing models of care for all pilot projects and demonstrations, including those in the Patient Protection and Affordable Care Act. These principles speak directly to addressing our nation’s eldercare workforce crisis by building a caring and competent workforce. EWA firmly believes these principles will help address not only the quality of care provided to older adults, especially those who are dually eligible, but also lower the cost of care through prevention. We urge the Committee to include workforce innovation as a requirement of any new chronic care pilot projects and to require grantees to report and disseminate best practices. Evaluation of these efforts, in order to identify the elements related to success, would be important to enhancing the knowledge of the field as a variety of models are designed and implemented.

Accountable Care Organizations

Roughly, 82 percent of beneficiaries served by Accountable Care Organizations (ACO) are over the age of 65.ⁱⁱ Additionally, more than ten percent of ACO beneficiaries are dually eligible for Medicare and Medicaid. A significant amount of money is spent on the provision of care, services and supports to meet dually eligible beneficiaries' often complex needs. In the Medicare program—which for dually eligible individuals primarily pays for their acute and hospital care, and prescription drugs—dually eligible individuals make up only 21 percent of enrollees but 36 percent of expenditures.ⁱⁱⁱ

Given the high proportion of older adults who are ACO beneficiaries, the Alliance recommends that Congress direct the Centers for Medicare and Medicaid Services (CMS) to require ACOs to partner with geriatrics education and training programs to provide continuing education to the entire ACO health care team. More specifically, the Alliance recommends that Congress direct CMS to work with the Health Resources and Services Administration (HRSA) to develop application requirements for organizations seeking to renew their ACO program to bolster the connection between ACOs and Geriatrics Workforce Enhancement Program (GWEP) grantees. ACO program applications should require applicants to demonstrate a partnership with GWEPs or other geriatrics and gerontology training programs within their state or region.

The coordination of care across sites and care delivered by interdisciplinary teams are the hallmarks of high quality and efficient geriatrics and gerontology care. This recommendation to require ACOs to partner with training programs in geriatrics and gerontology would enhance interdisciplinary team care and care coordination principles and competencies among individual providers across care settings who are treating beneficiaries living with chronic disease.

3. Reforms to Medicare's current fee-for-service program that incentivizes providers to coordinate care for beneficiaries living with chronic conditions;

Health care providers who care for older adults serve a complex, challenging population, and evidence shows that working with this population is highly satisfying. However, there are significant barriers to recruiting and retaining people in the field of geriatrics, gerontology, and eldercare due, in part, to financial disincentives. The costs associated with extra years of geriatrics and gerontological training do not translate into additional income, and specialists in aging tend to earn significantly less income than specialists in other areas.

To meet the need, financial incentives to increase the number of people who specialize in geriatrics and gerontology, such as funding to attract knowledgeable academic faculty, loan forgiveness, and scholarships should be offered. Additionally, reimbursement to support participation in interdisciplinary teams, as recommended by the Institute of Medicine report *Retooling for an Aging America: Building the Health Care Workforce* is needed.

EWA and N3C's Care Coordination Issue Brief (included below) contains models addressing the Committee's question.

4. The effective use, coordination, and cost of prescription drugs;

EWA found in its research with N3C that comprehensive teams can better meet the individual's needs, such as teams in which pharmacist participate to assist with medication management.^{iv} We would note however, less than half of pharmacy schools have a distinct course in geriatrics despite the fact that per capita prescription drug use by people 65 and older is triple that of younger individuals.^v

The Alliance, through a series of roundtable discussions with various members of the interdisciplinary care team, identified gaps in care and inefficient uses of the current workforce in a 2014 [issue brief](#) entitled “ADVANCED DIRECT CARE WORKER: A Role to Improve Quality and Efficiency of Care for Older Adults and Strengthen Career Ladders for Home Care Workers.”^{vi} In the brief, EWA proposes one solution for improving care for older adults. The Alliance believes that with the appropriate training, supervision, and support, some home care workers can play an enhanced role, with more responsibility for improving safety and quality of care for older adults and their family caregivers. We recommend fostering an Advanced Direct Care Worker (DCW) role that both improves the quality of person- and family- centered care and addresses current and future demand for a high-functioning eldercare workforce. Developing such a role and deploying workers in this capacity can lead to better health, better care, and potential cost-savings.

While restrictions differ from state to state, an advanced role for home care aides and certified nursing assistants (CNA) could also help support medication adherence by helping to monitor and/or administer medications, potentially including injectable, topical, oral, and suppositories.^{vii} Appropriate training could include the observation and recording of medications and side effects, importance of medication compliance, knowledge of negative drug interactions, and the reporting of individuals’ and families’ medication-related concerns.

In 2012, the Institute of Medicine released a report, *The Mental Health and Substance Use Workforce for Older Adults: In Whose Hands?*, analyzing the mental health and substance use needs of the aging population and the corresponding workforce across all settings. According to the report, at least 5.6 million to 8 million – or nearly one in five older adults – in America have one or more mental health or substance use issues. Depression, dementia, anxiety, and substance abuse among older Americans are growing problems that result in functional dependence, long-term institutional care, and reduced quality of life. Greater investments in the mental health and substance use workforce for older adults are sorely needed, especially for providers who work with older adults in home settings.

EWA and N3C’s Care Coordination Issue Brief (included below) contains models addressing the Committee’s question.

5. Ideas to effectively use or improve the uses of telehealth and remote monitoring technology

The Alliance believes that health information technology and telehealth applications have the opportunity to enhance the care provided by a well-trained workforce and support family caregivers in their role. EWA has found health information technology is a key element to support effective care coordination and individual and family caregiver engagement. Policies should encourage individuals, family caregivers, and the health care team to use this technology, while safeguarding the privacy of mental health information. Improved quality and safety, however, will require a geriatrically and gerontologically competent workforce as well as one that has additional training and support in the use of available technology. Any federal workgroups established to address the use of technology in the care of older adults should include health care professionals, direct care workers, older adults, and family caregivers.

6. Strategies to increase chronic care coordination in rural and frontier areas

EWA has consistently supported the Home Health Planning Improvement Act (S. 578) which would allow advanced practice registered nurses (APRNs), including nurse practitioners (NPs), clinical nurse specialists (CNSs), certified nurse midwives (CNMs), as well as physician assistants (PAs), to order home health services under Medicare in accordance with state law. Changing the Medicare law to allow APRNs to sign home health plans of care and certify Medicare beneficiaries for the home health benefit will help to deliver

vital care to older adults without unnecessary delays. This is especially important to older adults living in communities where access to physicians is limited, including underserved urban and remote rural areas.

The Alliance supports all interdisciplinary care team members being allowed and encouraged to practice to the full extent of their knowledge, training, and skills and work together to provide well-coordinated care, as each team member plays a valuable role in providing quality care.

7. Options for empowering Medicare beneficiaries to play a greater role in managing their health and meaningfully engaging with their health care providers; and

Successful care coordination programs incorporate significant in-person interaction with the individual and family caregiver; whereas, many disease management programs are telephone based. EWA and N3C found four specific person- and family-centered focused elements of effective care coordination:

- In-person interaction among the individual, family caregiver, care coordinator, and providers encourages better communication regarding the individual's needs and care. Significant in-person interaction between the individual and care coordinator is associated with reduced hospital admissions and Medicare spending.^{viii}
- Care coordination targeted to individuals with certain health conditions, hospitalization patterns, and functional limitations can generate Medicare cost savings of approximately \$100-\$120/month per individual.^{ix}
- Having the individual and family caregiver centrally involved in care plan development improves outcomes. Particularly for older adults, a family caregiver may play a central role in ensuring that the plan of care is implemented. Literature regarding effective self-management support emphasizes personal empowerment or activation, in addition to active participation, when setting goals and developing treatment plans.^x
- Effective models, including many of the ones named in this brief, include tools and supports specifically for family caregivers, as well as caregiver assessments.^{xi}

EWA and N3C's Care Coordination Issue Brief (included below) contains models addressing the Committee's question.

8. Ways to more effectively utilize primary care providers and care coordination teams in order to meet the goal of maximizing health care outcomes for Medicare patients living with chronic conditions.

The coordination of care across sites and care delivered by interdisciplinary teams are the hallmarks of high quality and efficient geriatrics and gerontology care. EWA and N3C found seven specific team-based care elements of effective care coordination:

- Close interaction between care coordinators and interdisciplinary team members, including physicians,^{xii} results in fewer hospital admissions.
- Integration of direct-care workers into care coordination teams can help create partnerships among providers, consumers, and their families.^{xiii}
- Encounters with registered nurses, as members of the interdisciplinary team, can lead to a reduction in emergency department visits and unnecessary office visits.^{xiv}
- Involvement from social workers, as members of the interdisciplinary care team, can help to meet the social support needs of frail individuals with chronic illnesses,^{xv} as well as ensure successful transition from hospital to home.^{xvi}

- Comprehensive teams can better meet the individual's needs, such as teams in which pharmacists participate to assist with medication management.^{xvii}
- Collaborative care models for depressive disorders, in which psychiatrists and psychologists collaborate with primary care providers, reduce depression and increase the individual's satisfaction with care across multiple populations, including older adults.^{xviii}
- When care coordination is team-based, interdisciplinary and maintains open communication, individuals feel most supported and quality of care improves.^{xix}

Medicare Graduate Medical Education

EWA recognizing's that the Committee did not specifically request feedback the Graduate Medical Education program, however we believe it is important to note this program has the unique opportunity to train and encourage medical residents and geriatric fellows to practice effectively in team based setting. EWA has supported strengthens geriatrics training in Medicare Graduate Medical Education (GME) programs and ensuring greater accountability and higher quality in Medicare GME programs.

The Alliance supports language in Senator Murray's Community-Based Medical Education Act of 2014 legislation that will include geriatrics within the definition of primary care for the Health Resources and Services Administration (HRSA) Teaching Health Centers and in the definition of shortage specialties that apply to the proposed Primary Care Teaching Centers program. There are currently approximately 7,500 certified geriatricians in the United States, but it is estimated that more than 17,000 geriatricians are needed now to care for approximately 12 million older Americans today. Additionally, exposure to geriatrics and gerontological principles and practices will be essential for training the health care teams serving older adults in the future.

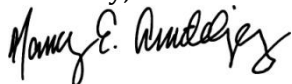
The Alliance also supports the following proposed measures of population health priorities for all Medicare GME programs in Senator Murray's legislation:

- The percent of residents training in shortage specialties (including geriatrics);
- The extent of training provided in a variety of settings;
- The coordination of patient care across various settings;
- Interprofessional and multidisciplinary care teams; and
- The number of graduates practicing in shortage specialties 5 years after graduation, including in shortage specialties in health professional shortage areas.

Collecting this information is essential to ensuring the Medicare GME program is meeting the needs of older adults served by the Medicare program.

On behalf of the members of the Eldercare Workforce Alliance, we thank you for this opportunity to submit comments on these important ideas for chronic care reform in the Medicare program and your commitment to improving the lives of older Americans.

Sincerely,



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EWA Co-Convener



Michèle J. Saunders, DMD, MS, MPH
EWA Co-Convener

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- ⁱ Eldercare Workforce Alliance. *Geriatrics Workforce Shortage: A Looming Crisis for Our Families*. <http://www.eldercareworkforce.org/research/issue-briefs/research:geriatrics-workforce-shortage-a-looming-crisis-for-our-families/>
- ⁱⁱ Centers for Medicare and Medicaid Services. Fast Facts: All Medicare Shared Savings Program (Shared Savings Program) ACOs and Pioneer ACOs. <http://www.cms.gov/Medicare/Medicare-Fee-for-Service-Payment/sharedsavingsprogram/Downloads/PioneersMSSPCombinedFastFacts.pdf>
- ⁱⁱⁱ Kaiser Family Foundation. "Affordable Care Act Provisions Relating to the Care of Dually Eligible Medicare and Medicaid Beneficiaries." <http://kff.org/health-reform/issue-brief/affordable-care-act-provisions-relating-to-the/>
- ^{iv} Nelson, L. Lessons from Medicare's Demonstration Projects on Disease Management and Care Coordination. Congressional Budget Office Working Paper Series. January 2012; 2012-01: 7
- ^v IOM report Retooling for an Aging America: Building the Health Care Workforce, page 130.
- ^{vi} ADVANCED DIRECT CARE WORKER.
- ^{vii} *ADVANCED DIRECT CARE WORKER: A Role to Improve Quality and Efficiency of Care for Older Adults and Strengthen Career Ladders for Home Care Workers*. Eldercare Workforce Alliance. http://www.eldercareworkforce.org/files/EWA_Advanced_DCW_Issue_Brief-pub2014.pdf
- ^{viii} Nelson 4.
- ^{ix} Brown, R. The Promise of Care Coordination: Models that Decrease Hospitalizations and Improve Outcomes for Medicare Beneficiaries with Chronic Illness. March 2009, 22.
- ^x Wagner, et al., Finding Common Ground. Journal of Alternative and Complementary Medicine. 2005, vol. 11. P.S9
- ^{xi} Gibson, M, Kelly, K, Kaplan, A. Family Caregiving and Transitional Care: A Critical Review. Family Caregiver Alliance National Center on Caregiving. October 2012.
- ^{xii} Nelson 7.
- ^{xiii} Curtis, J, Hodin, R, Seifert, R. Special Delivery: How coordinated care programs can improve quality and save costs. Community Catalyst. May 2009, p.7.
- ^{xiv} American Nurses Association. The Value of Nursing in Care Coordination. June 2012. <http://www.nursingworld.org/carecoordinationwhitepaper>
- ^{xv} Brown 25.
- ^{xvi} Perry, A., Rooney, M., & Golden, R. (2011, May). Rush enhanced discharge planning program: Improving care across transitions from hospital to home.
- ^{xvii} Nelson 7.
- ^{xviii} Thota, et al. Collaborative care to improve the management of depressive disorders: A community guide, systematic review, and meta-analysis. American Journal of Preventive Medicine. 2012; 42(5): 525-538.
- ^{xix} Shortell, et al., The Role of Perceived Team Effectiveness in Improving Chronic Illness Care. Medical Care. Nov. 2004, Vol. 42, No. 11, p. 1046.

CARE COORDINATION

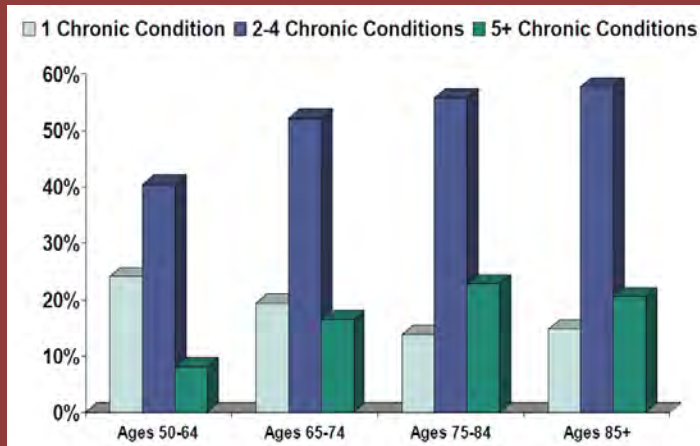
Care coordination has emerged as a promising element of successful health care and long-term service delivery models. It unites a team of providers to meet individual needs, improves health care access and outcomes, and synchronizes the variety of long-term services and supports. In these models, a care coordinator works closely with the individual, family caregivers, primary care provider, and other health care professionals to improve communication, resulting in improved individual well-being and outcomes.

Initiatives aimed at improving care coordination are especially timely. The prevalence of multiple chronic conditions and functional impairment within the aging population is increasing. Older individuals with multiple chronic conditions need health care that is well coordinated with any needed long-term services and supports. At the same time, the Center for Medicare & Medicaid Innovation (CMMI), created by the Affordable Care Act (ACA), is tasked with testing and rapidly disseminating innovative health care delivery models and alternative payment structures over the next eight years to improve quality while reducing cost.

THE PROMISE OF CARE COORDINATION

Eighty percent of Americans 65 and older have one chronic condition,¹ and almost 50% have multiple chronic conditions.² For individuals with certain chronic illnesses who are hospitalized, 33 to 50% are rehospitalized within 90 days.³ The 15 percent of Medicare enrollees with both chronic conditions and functional limitations who need long-term services and supports account for one-third of Medicare spending.ⁱ Care coordination can help to improve care for this population, and reduce the cost of treating them, if the most effective elements of care coordination models are identified, and challenges are addressed. The best care coordination models have much to contribute toward the goals of the ACA and CMMI; they are well-coordinated, and person- and family-centered, across service settings, and promote better communication and interaction among the respective members of the interdisciplinary team, individual, and family caregiver.⁴ EWA and N3C believe that CMMI's objectives can only be achieved if quality – quantified by results such as reduced hospitalizations and improved quality of life – remains a major focus of the models tested.

Older Americans with Multiple Chronic Conditions



Source: AARP—Beyond 50.09: Chronic Care

DISTINGUISHING BETWEEN CARE COORDINATION & DISEASE MANAGEMENT PROGRAMS

Recent research and evidence reviews have identified some of the elements of care coordination models which are most effective. A weakness of some recent reviews, however, has been failure to note the difference between care coordination and disease management programs, to address the oftentimes significant role of families in coordinating care, and to adequately value the impact of the interventions examined on improving care quality. Care coordination is different from disease management in that it takes a holistic approach to coordinating care and supportive services for the individual overall, rather than focusing on a particular disease. Successful care coordination programs also incorporate significant in-person interaction with the individual and family caregiver; whereas, many disease management programs are telephone based.

A January 2012 Congressional Budget Office report titled, "Lessons from Medicare's Demonstration Projects on Disease Management, Care Coordination, and Value-Based Payment," concluded that, on average, the interventions examined did not reduce Medicare spending or generate sufficient savings to offset program fees.⁵ It should be noted, however, that 22 of the 34 programs analyzed reduced hospital admissions by more than 6 percent, including four programs that

reduced admissions by 15 percent or more. Such reductions represent a significant increase in quality of life for the individuals who avoided hospitalization.

Also noteworthy are differences among the 34 programs CBO analyzed. The Medicare Coordinated Care Demonstration (MCCD) is separate from the remaining five that include less successful Disease Management Demonstrations. The disease management programs analyzed mostly rely on telephonic interventions, show minimal success in randomized trials, and have not generated savings.⁶ In contrast, independent policy researchers report that cost reductions and savings found in effective care coordination programs within the MCCD share common components linked to improved outcomes.⁷

Care coordination is centrally important for the success of Medicaid managed care models in place in an increasing number of states, as well as Patient-Centered Medical Homes, and Accountable Care Organizations.

CARE COORDINATION: Effective Elements

Elements of care coordination models found to be effective in improving quality of care and coordination of social supports while reducing system cost or remaining cost-neutral are:

Person- and Family-Centered Care

- The team should include providers across disciplines and settings, the individual, and family caregivers. Direct-care workers can serve an invaluable role on the care team due to their frequent and ongoing interactions with individuals receiving care.⁸
- In-person interaction among the individual, family caregiver, care coordinator, and providers encourages better communication regarding the individual's needs and care. Significant in-person interaction between the individual and care manager is associated with reduced hospital admissions and Medicare spending.⁹
- Care coordination targeted to individuals with certain health conditions, hospitalization patterns, and functional limitations can generate Medicare cost savings of approximately \$100-\$120/month per individual.¹⁰
- Having the individual and family caregiver centrally involved in care plan development improves outcomes. Particularly for older adults, a family caregiver may play a central role in ensuring that the plan of care is implemented. Literature regarding effective self-management support emphasizes personal empowerment or activation, in addition to active participation, when setting goals and developing treatment plans.¹¹
- Effective models, including many of the ones named in this brief, offer tools and supports specifically for family caregivers, as well as caregiver assessments.ⁱⁱ

Team-Based Care

- Close interaction between care coordinators and interdisciplinary team members, including physicians,¹² results in fewer hospital admissions.
- Encounters with registered nurses, as members of the interdisciplinary team, can lead to a reduction in emergency department visits and unnecessary office visits.¹³
- Involvement from social workers, as members of the interdisciplinary care team, can help to meet the social support needs of frail individuals with chronic illnesses,¹⁴ as well as ensure successful transition from hospital to home.¹⁵
- Integration of direct-care workers into care coordination teams can help create partnerships among providers, individuals, and their families.ⁱⁱⁱ

Promising Care Coordination Models*

<i>Comprehensive</i>	<ul style="list-style-type: none"> • Care Management Plus (CMP) • Geriatric Resources for Assessment and Care of Elders (GRACE) • Guided Care • Home Based Primary Care (HBPC) • Improving Mood-Promoting Access to Collaborative Treatment (IMPACT) • Program of All-inclusive Care for the Elderly (PACE)
<i>Transitional</i>	<ul style="list-style-type: none"> • Better Outcomes for Older Adults through Safe Transitions (Project BOOST) • The Bridge Model • Care Transitions Intervention (CTI) • Interventions to Reduce Acute Care Transfers (INTERACT II) • Re-engineered Discharge (RED) • Transitional Care Model (TCM)

* Please see Appendix A: *Program Details of Featured Comprehensive and Transitional Care Coordination Models*

- Comprehensive teams can better meet the individual's needs, such as teams in which pharmacists participate to assist with medication management.¹⁶
- Collaborative care models for depressive disorders, in which psychiatrists and psychologists collaborate with primary care providers, reduce depression and increase the individual's satisfaction with care across multiple populations, including older adults.¹⁷
- When care coordination is team-based, interdisciplinary and maintains open communication, individuals feel most supported and quality of care improves.¹⁸

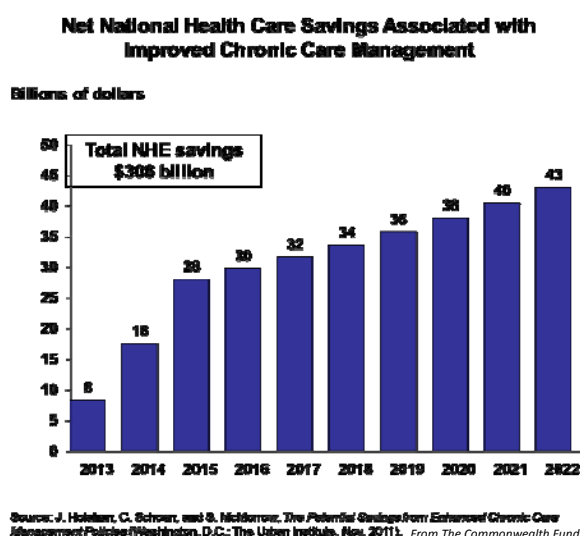
Evidence Base

Care coordination programs with positive, rigorously evaluated and broadly replicable results include comprehensive and transitional care models. While both approaches feature elements in common such as conducting an initial comprehensive assessment and implementing an evidence-based care management plan (including coaching, self-care education, and maintaining links with medical and community-based services), they are differentiated with regard to where the intervention takes place, who performs the intervention, and for how long. Additionally, targeting the highest-risk individuals yields the greatest success.

CARE COORDINATION: Lessons Learned

Key points to consider for implementation of effective care coordination models include:¹⁹

- Successful care coordination is more likely when the interdisciplinary team has access to timely data on care delivery, especially in regard to hospital admissions.
- Focusing on smooth transitions between care settings is crucial.
- Targeting the highest-risk individuals yields the greatest success in terms of improved quality of care and reduced cost.
- Attention to mental health and psychosocial issues must be incorporated into care coordination models.²⁰



MEETING FUTURE CHALLENGES:

Recommendations for Care Coordination Research & Policy

In order to realize the full potential of care coordination to improve quality of care – especially for an aging population – EWA and N3C make the following recommendations for policy changes and future research:

- Encourage payment and delivery models that support improved coordination and communication among members of the interdisciplinary team of providers, direct care workers, the individual, family caregivers and others chosen by the individual.
- Strengthen family caregiver capacity to manage care, as appropriate, and provide support to the individual, as well as assess family caregiver capacities, needs and coping ability.
- Ensure that the individual and family caregiver are involved in shared decision-making at each step of care and transitions between settings.
- Target the highest-risk individuals, especially those at risk of hospitalization.
- Develop, support, and use technology, such as health information technology (HIT) and interoperable electronic health records (EHRs) to support effective care coordination and individual and family caregiver engagement. Encourage policies that will enable individuals, family caregivers, and providers to use this technology.
- Craft policies which ensure efficiency, transparency, individual self-determination and safeguards, while supporting access to high quality, coordinated care.
- Promote care coordination models that emphasize care coordination across disciplines and settings of care, including long-term care and other non-medical settings.

APPENDIX A:

Program Details of Featured Comprehensive and Transitional Care Coordination Models

Comprehensive Care

Care Management Plus (CMP): A person-centered intervention designed to reduce mortality and hospital admissions for elderly patients of primary care practice.

- Evidence: Intervention individuals had lower two year all-cause mortality rates; intervention patients with diabetes had lower all-cause mortality and hospitalization rates compared to control group patients with diabetes.
- Target Population: Older adults, 65 years and older, who have multiple co-morbidities, diabetes, frailty, dementia, depression and other mental health needs; physician referral.
- Staffing: RN care manager located in primary care clinics. Each RN has a caseload of 350-500 patients.
- Duration: Ongoing.
- Focus: Person-centered assessment, comprehensive care planning, evidence-based treatment plans and protocols, disease and self-management education, continuity of care and regular follow up by RN care manager, continuity of care via specialized information technology system.²¹

Geriatric Resources for Assessment and Care of Elders (GRACE): A model to improve the quality of care for low income seniors by the longitudinal integration of geriatric and primary care services across the continuity of care.

- Evidence: Intervention patients at high risk of hospitalization in year two of a three year Randomized Controlled Trials had significantly lower hospital rates and ED visits compared to control group patients. The intervention was cost neutral in the first two years and showed a cost savings in year three.
- Target Population: Older adults, 65 years and older, who had income less than 200% of the federal poverty level.
- Staffing: An APN and social worker (SW) in collaboration with the patient's PCP and a geriatric interdisciplinary team led by a geriatrician. Each RN/SW team has a caseload of 100-125 patients.
- Duration: Ongoing.
- Focus: In-home assessment and individualized care plan; proactive monitoring; use of specific care protocols for evaluation and management of common geriatric conditions, use of an electronic medical record and web-based care management tool; integration with affiliated pharmacy, mental health, home health and community-based and inpatient geriatric services.²²

Guided Care: A model of comprehensive health care provided by nurse-physician teams for individuals with multiple chronic conditions.

- Evidence: Improves quality of care, reduces caregiver strain, and suggests a reduction in the use and cost of expensive services, especially in integrated health care delivery systems.
- Target Population: Older adults, 65 years and older, who are at high risk of using health services during the following year.
- Staffing: RN based in primary care practice working with 3-5 physicians. Each RN has a caseload of 50 to 60 patients.
- Duration: Ongoing.
- Focus: In-home assessment and individualized evidence-based comprehensive care guide and action plan; monthly monitoring; patient education and self-management; transitional care; coordinate access to community resources.²³

Home Based Primary Care (HBPC): The HBPC program was created in 1972 by the Department of Veterans Affairs to serve veterans with chronic conditions by focusing on providing a home-based approach to healthcare. The HBPC mission is to provide comprehensive, interdisciplinary, primary care in the homes of veterans with complex medical, social, and behavioral conditions for whom routine clinic-based care is not effective.

- Evidence: Since its creation, among high-cost individuals, hospital days have been reduced by 62%, nursing home days by 88% and costs by 24%.
- Target Population: HBPC targets primarily the following three types of patients in need of home care:
 - (1) Longitudinal care patients with chronic complex medical, social, and behavioral conditions, particularly those at high risk of hospital, nursing home, or recurrent emergency care.
 - (2) Longitudinal care patients who require palliative care for an advanced disease that is life limiting and refractory to disease-modifying treatment.
 - (3) Patients whose home care needs are expected to be of short duration or for a focused problem, when such services best help the interdisciplinary team meet the needs of this population.
- Staffing/Services: In home services include primary care visits at home by a physician, APN or PA; care management through a APN, PA, or RN; coordination of services by a SW; therapy visits from a physical,

- occupational, or speech therapist; specialized mental health services, including evaluation and treatment, by a psychologist and/or psychiatrist; nutrition counseling from a dietitian; assistance with medication management.
- Duration: Ongoing, comprehensive longitudinal care, often for the remainder of the veteran's life.
- Focus: Primary care services delivered in the veteran's home by an interdisciplinary team to improve quality without added cost, and maximizing veteran's independence through comprehensive longitudinal interdisciplinary care.²⁴

Improving Mood-Promoting Access to Collaborative Treatment (IMPACT): A person-centered, collaborative, team approach to the treatment of depression in the primary care setting.

- Evidence: In the original research study, 55% of intervention patients and 34% of usual care patients showed a 50% or greater reduction in their depression symptoms. IMPACT patients also had higher remission rates for depression, more depression-free days, less fatigue, a better quality of life, less functional impairment and fewer thoughts of death. Many of the benefits lasted up to a year after active treatment had ended. Also, adults over the age of 60 who received a year of the IMPACT intervention had lower average costs of about \$3,300 for all of their health care over a 4 year period, including the cost of the intervention.
- Target Population: Adults of all ages. Research has been effective with older adults (60 years of age and older) diagnosed with diabetes or cancer.
- Staffing/Services: A depression care manager (RN, SW or psychologist), with consultation from a psychiatrist and an expert Primary Care Provider (PCP), works with patients and their PCP to treat depression. The patient's PCP works with the care manager to develop and implement a treatment plan (medications and/or brief, evidence-based psychotherapy, and the care manager and PCP consult with the psychiatrist if a change is needed because patients do not improve. The depression care manager educates the patient about depression; supports anti-depression therapy prescribed by the patient's PCP (if appropriate); coaches patients in behavioral activation and pleasant events scheduling; offers a brief (6-8 session) course of counseling in problem solving; monitors depressive symptoms; and completes a relapse prevention plan with each patient that has improved.
- Duration: Up to one year of follow-up; significant improvements expected within 10-12 weeks of treatment.
- Focus: Collaborative, team based care, with treatment adjusted based on clinical outcomes and an evidence-based care algorithm. If a patient has not significantly improved in 10-12 weeks of treatment (50% reduction in depressive symptoms), treatment plans are changed, to include: increase in medication dosage, a change in medications, addition of psychotherapy, a combination of medication and psychotherapy, or other treatments suggested by the team psychiatrist.²⁵

Program of All-Inclusive Care for the Elderly (PACE): A fully-integrated, provider-sponsored model of care designed to meet the specific health care needs of Medicare and/or Medicaid beneficiaries with both chronic medical conditions and functional and/or cognitive impairments.

- Evidence: PACE was evaluated in 1 cross-sectional time series and 3 cohort studies, each of which compared PACE participants with control participants who were receiving different packages of medical and supportive services in their local communities.
 - In the cross-sectional time series PACE had fewer hospital admissions and preventable hospital admissions, as well as fewer total and preventable emergency department visits, compared with a community-based comparison group in which medical care was provided by independent primary care physicians.
 - A 6-year cohort study compared PACE participants with similarly disabled Medicaid enrollees who were receiving community-based supportive services. PACE participants had less pain and fewer unmet needs for assistance in bathing, dressing, and getting around. PACE participants had more nursing home admissions, probably reflecting PACE's use of nursing homes for subacute, postacute, and respite care.
 - A 12-month cohort study compared PACE participants and those in a Medicaid-sponsored, managed long-term care plan. PACE had fewer hospitalizations, more nursing home stays, and shorter median lengths of stay than participants receiving nurse-provided case management in the managed care plan.
 - A 5-year cohort study found longer median survival among individuals enrolled in PACE than in those who received case management and community services.
- Target Population: Most individuals are medically complex, low income, are "dual eligibles" (enrolled in both Medicare and Medicaid), and have disabilities that are that make them dependent on others to assist them with their ADL/IADL limitations. They must be over 55 years old, need a nursing home level of care, and be able to live safely in the community.
- Staffing/Services: Each PACE site provides a comprehensive set of services, including: primary and specialty interdisciplinary team services; emergency, hospital, home, palliative, and long term care; case management, prescription drugs, dentistry, laboratory testing, radiology, adult day care, transportation, prosthetics, DME, meals; and respite and education and support for family caregivers.
- Duration: Ongoing.

- Focus: Interdisciplinary team care that is responsible for assessments, care planning, and coordination of 24-hour delivery of care, every day of the year.²⁶

Transitional Care

Better Outcomes for Older Adults Through Safe Transitions (Project BOOST): A person-centered intervention that focuses on identifying the needs, abilities, and desires of patients, their immediate caregivers and their outpatient patients for the safe transition out of the hospital during the discharge process.

- Evidence: *Not Reported*. Goal is to improve the care of patients as they transition from the hospital to home.
- Target Patients: Older adults hospitalized for any of the following: cancer, stroke, diabetes/glycemic complication, COPD, heart failure, depression, risky medications, 5 or more medications, poor health literacy, absence of a formal or informal caregiver, an unplanned hospitalization in the prior 6 months, or need for palliative care.
- Staffing: BOOST is implemented in combination with other care-transitions models such as CTI or TCM.
- Duration: One phone call to high-risk patients within 3 days of hospital discharge, not contact for low-risk patients.
- Focus: BOOST specifies components to be included in the intervention (risk assessment, teach-back process, written discharge instructions communicated to patient and PCP), and provides implementation tools (risk-assessment tool with specific recommended interventions for each identified risk). The BOOST program also includes training and one year of technical assistance to participating hospitals.²⁷

The Bridge Model: A social work-led, person-centered, interdisciplinary model of transitional care. Bridge Care Coordinators conduct a comprehensive pre- and post-discharge assessment and intervene until all identified needs are resolved and stabilized. Bridge is designed to reduce preventable re-hospitalizations and ED visits, improve satisfaction, and improve quality of life for both clients and caregivers.

- Evidence: Improved communication with providers and improved attendance at follow-up medical appointments; ongoing evaluation of a randomized control trial, Administration on Aging care transitions grant data, and Community-based Care Transitions Program data.
- Target Population: Older adults, 60 years or older, with at least 1 chronic condition and a previous hospitalization within the last 6 months. In addition, eligible participants must have at least one of the following: discharged with home health, living alone, or discharged to a skilled nursing facility.
- Staffing: Masters-level clinical Social Worker with experience in aging and community resources.
- Duration: Length varies on need; the average intervention during a randomized control trial was 5.5 days.
- Focus: Ecosystem-based, comprehensive social work assessment; Social Worker leads and facilitates post-discharge care (Aging network, primary care physician, home health, pharmacy, durable medical equipment, other community-based service providers); Motivational Interviewing to improve patient activation and health literacy; support caregivers to reduce stress/burden.²⁸

Care Transitions Intervention (CTI): A person-centered intervention designed to improve the quality and contain costs for patients with complex care needs as they transition across care settings.

- Evidence: Intervention patients had lower 90 day re-hospitalization rates and lower hospital costs at 180 days post discharge.
- Target Patients: Individuals being discharged from the hospital with a diagnosis of: stroke, heart failure, coronary artery disease, cardiac arrhythmias, COPD, diabetes, spinal stenosis, hip fracture, peripheral vascular disease, deep venous thrombosis, and pulmonary embolism.
- Staffing: A transition coach, which can be an APN, RN, SW or occupational therapist. Each transition coach has a caseload of approximately 40 patients.
- Duration: 30 days post hospital discharge.
- Focus: Continuity of care by helping family maintain a personal health record, understand how and when to obtain timely follow-up care, coach patients to ask the right questions of their care providers, help patients increase self-care skills (medication management, increased awareness of chronic illness symptoms, recognizing "red flags" and warning signs and how to respond); initial home visit (48 to 72 hours post hospital discharge), and three follow-up calls 30 days post discharge home.²⁹

Interventions to Reduce Acute Care Transfers (INTERACT II): A quality improvement program designed to improve the early identification, assessment, documentation, and communication about changes in the status of residents in skilled nursing facilities. The goal of INTERACT is to improve care and reduce the frequency of potentially avoidable transfers to the acute hospital.

- Evidence: INTERACT II was evaluated in 25 nursing homes (NHs) in 3 states in a 6 month quality improvement initiative. The 25 NHs experienced a 17% reduction in hospitalization rates compared with the same 6 month period in the previous year. It was estimated that this reduction in hospitalization resulted in Medicare savings in a

100 bed NH of about \$125,000 per year.

- Target Patients: All residents of a skilled nursing facility.
- Staffing: All NH staff, especially certified nursing assistants (CNAs), RNs and LPNs, NPs, PAs, and physicians.
- Duration: Ongoing, quality improvement initiative.
- Focus: The intervention addresses 3 strategies: identifying, assessing, and managing conditions to prevent them from becoming severe enough to require hospitalization; managing selected conditions, such as respiratory and urinary tract infections in the NH; and, improving advance care planning and developing palliative care plans as an alternative to acute hospitalization for residents at the end of life. INTERACT II has a diverse set of tools and resources available to NHs that implement the initiative.³⁰

Re-Engineered Discharge (Project Red): Project RED at Boston Medical Center standardizes the hospital discharge process through the use of 11 separate but mutually reinforcing steps that health care professionals follow from patient admission to post discharge. The steps incorporate the provision of patient education, care coordination with PCPs, and postdischarge follow-up with a pharmacist.

- Evidence: Intervention patients had 30 day readmission rates that were 30% lower compared to control group patients and 30 day ED visits were 33% lower in the intervention group compared to the control group. The revised discharge planning process enhanced patient's understanding of post discharge roles and responsibilities; increased patient's perception of preparedness for discharge; and, increased the likelihood of follow-up appointments with their PCP after discharge.
- Target Patients: Adult, non-acute, non-surgical patients, who are discharged to the community (home).
- Staffing: Hospital discharge advocate (RN) and a pharmacist.
- Duration: 2 days following discharge. RN discharge advocate meets with the patients at least once in the hospital and a clinical pharmacist calls the patients 2 to 4 days after discharge to reinforce the discharge plan, review medications, and problem solve.
- Focus: Within the first 24 hours of admission, the RN discharge advocate provides a number of services to and for the patient, including: general patient education, medication reconciliation, communicating with hospital physicians, locating a PCP (if needed), arranging follow-up PCP appointments, connecting patients to pharmacies, explaining discharge information, creating and explaining the post discharge plan, and telling patients who to contact if they have any questions or if a problem arises. The pharmacist calls patients 2 to 4 days after discharge and as necessary thereafter.³¹

Transitional Care Model (TCM): A person-centered intervention designed to improve quality of life, patient satisfaction, and reduce hospital readmissions and costs for elderly patients.

- Evidence: Results demonstrate significant improvements in patient safety and health care outcomes, enhancements in quality of life and satisfaction with care, and reductions in overall health care costs. Intervention elderly patients discharged from the hospital to home with Heart Failure had few re-hospitalizations and lower total health care costs.
- Target Patients: The initial studies were elderly patients, 65 years and older, discharged to home from the hospital with HF. Currently, patients are eligible for TCM if they have multiple chronic conditions and complex therapeutic regimes.
- Staffing: APNs as Transitional Care Nurses (TCN) with a caseload of approximately 40 patients.
- Duration: Three months following hospital discharge (index hospitalization).
- Focus: The TCN, as part of a nurse-led, multidisciplinary intervention, follows patients from the hospital to their homes, using an evidence-based care coordination approach, provides services targeted to prevent medication and other medical errors, and helps patients and their caregivers with early symptom recognition, management of chronic conditions, and recommendations for future care.³²

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Additional contact information can be found at:
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