# Goal Card Introduction

OCTOBER 19, 2020

#### Goals as part of Shared Plan of Care (SPoC)

- Excellent work so far, most families know they have a SPoC!
- Goals can be challenging
  - Hard for our team to ask
  - Hard for families to think of goals
  - "Hopes and dreams" vs SMART goals
- SMART goals
  - Specific
  - Measurable
  - Achievable
  - Realistic
  - Time-based

#### Commitment to Goals

SPA agreement for Medicaid payments requires a care plan that must:

- Specify the goals and actions to address the medical, social, educational, and any other identified need.
- Identify a course of action to respond to the member's assessed needs.
- Include timeframes for initiating and/or completing the identified actions

#### Audits

#### Annual Medicaid audits look for:

- Goals listed on shared plan of care
- Documentation that action was taken to work on goals
- Want to see when goals were met

#### Internal audits

Most goals don't have a timeline

## Our goal! Shared family goals

- Families need goals for multiple different purposes
  - Our Shared Plan of Care (mostly medical)
  - School/IEP
  - CLTS Waiver

#### Goal Cards!



## Learn how to tell others what I need







Communication

#### Get better sleep



Medical and Health

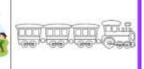




#### Play more







Community, Social, and School

## Get support for my brother(s) and sister(s)







Home and Family

# Be treated with respect







Independenc

# Improve my hygiene







Home and Family

#### Resources

- Physical cards in Conference Room and Clinic
  - English currently, printing Spanish copies
- Goal Cards Online:
  - https://healthtransitionwi.org/wpcontent/uploads/sites/178/2020/05/Goal-Cards-for-Families final.pdf
- Manual Online:
  - https://www.dhs.wisconsin.gov/publications/p02579d.pdf
- Coming soon: Web app that will print chosen Goal Cards and suggested resources

#### Next week

Becky Burns joins Monday meeting

- Designed Goal Cards and Manual
- Statewide Coordinator, Wisconsin Children and Youth with Special Health Care Needs

New workflow for using Goal Cards



#### Before Visit

- RN/CCA: Introduce Goal Cards to family in the month before a clinic/virtual visit
  - In monthly check-in call or during appt reminder call if possible
  - Always send Goal Card introduction and link by MyChart
  - New smartphrase: SNPGOALCARDS
- Provider:
  - Clinic: Bring Goal Cards to visit
  - Telehealth: Open Goal Card site in a tab so ready to share during visit

### **During Visit**

- Not dictating when in visit, you can do it when it comes up normally
- Either provider or nurse can lead discussion about goal cards, as it makes sense during the visit.
- Ask family if they had a chance to look at goal cards
- Scripting: We're trying out a new tool called Goal Cards. You got a MyChart message about it. Did you have a chance to look at it? What did you think? Can we look at them now?

### If they have chosen Goal Cards

- Use Manual for ideas for probing questions for discussion and resources related to each goal.
  - Can do this after the visit to send resources (and make sure to document that you do this!).
- Need SMART goals in documentation (for Medicaid payment requirements).
  - Specific
  - Measurable
  - Achievable
  - Realistic
  - Time-based

#### After Goal Card discussion

#### **Data Collection Sheet:**

- At end of visit (or end of goals discussion), ask family:
  - We are trying out the Goal Cards and want your honest option. How much did the Goal Cards influence the conversation around goals?
    - 1. They limited the conversation
    - 2. No change from usual
    - 3. They improved or supported the discussion
- Mark whether Goals were covered at end of visit or sometime sooner.
- Same 3 questions for team about Goal Cards

#### After Visit

- In note, document whether Goal Cards were used
- Send Data Sheet to Sarah J
- Make sure to document work on Goals between visits

#### Case Discussion

# Receive good dental care







Medical and Health

#### Case Discussion

# Feel like I belong in my community







Community, Social, and School