Continuing the Journey: Pastoral Services in Clinic Locations

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Objectives

1. Learn about Mercy’s on-going effort to address spiritual needs in physician offices/clinic setting
2. Identify skills and tools that chaplains need when working in physician offices
3. Share current practices in working with physician offices
   - Identifying spiritual needs/screening tools
   - Formal and informal spiritual assessments
   - Documentation/communication with the clinical team
   - Measuring impact on patient outcomes

Mercy is the 7th largest Catholic Health System in the US (31st overall) based on Net Patient Service Revenue, serving in over 140 communities and seven states. Source: Modern Healthcare Survey, June 2013

Where we serve

- Over 2,100 integrated physicians and 800 advance practitioners serve in 276 locations
- Primary care doctors and specialists are linked by electronic health record
- Physician led, professionally managed
- Holistic care/interdisciplinary approach
What if every Mercy patient—at all 5.4 million visits—were introduced to spiritual care and the availability of a chaplain?

Why reach out to clinics?

- 96% of patient encounters are outside of the hospital
- Pastoral Services strategic goals are aligned with Mercy's

*Everywhere and every way that Mercy serves, attention to spiritual needs will be evident.*

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**Mercy's Journey**

First Year (FY2011)
- Some outreach
- Learning: Need to be more intentional and focused in adapting to clinic setting

Second Year (FY2012)
- Approached clinic leaders as "learning partners"
- Developed Pilot Projects in 37 clinics

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**Mercy’s Journey**

Third Year (FY2013)
- More Pilot Projects
- Ministry-wide Smart Teams
  - Shared successful practices
  - Set up referral process in EHR
  - Developed training for chaplains
  - Standardized promotional materials
  - Obtained feedback from clinics
**Current Year (FY 2014)**

- Build on success of 2013 feedback
- Increase number of clinics served
- Track referrals systematically
- Initiate pilots RE: Screening processes
- Define standard referrals for specific groups, e.g., oncology, palliative care
- Work to standardize documentation

**Survey Results from 2013**

- Chaplains positively influence patient satisfaction: 84%
- Chaplains promote cultural and religious diversity: 85%
- Chaplains play positive role in supporting staff: 81%

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**What do chaplains do in clinic setting?**

- Introduce Pastoral Services
- Train staff RE: identifying spiritual needs and referral process
- Provide staff support
- Provide direct patient care
  - Responding to referrals
    - Phone
    - In person
- Complete spiritual assessment
- Document care plan in EHR
- Follow-up with interventions, as needed

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**Some data from referrals**

- 379 Referrals in Feb 2014
- Average time spend with patient, family member or staff referred: 20-21 minutes
- All patient referrals charted in electronic medical record
Who was referred for pastoral services consult?

- 76% patients
- 14% Co-workers
- 10% Family

Top Reasons for referrals

- Coping: 210
- Prayer/meditation: 124
- Fear/anxiety: 93
- New diagnosis: 85

* Reason for referral may include more than one response

Chaplain connected with the patient/family/co-worker referred

- By phone
- In person, need arose during rounding
- In person by appointment or planned by clinic staff
- By e-mail
- By video conference

Current Focus: Screening Tool

Initial Screening Tool Objectives

- Clinician user-friendly
- Introduction to promote holistic care
- Clinician approach—“Tell me your concerns"
- Significant spiritual distress indicators included
- 2+ indicators marked = Referral
- Eventual placement in EHR
Current Focus: Screening Tool

“Our team is committed to the well-being of the whole person. Are there any current concerns that are affecting your emotional or spiritual well-being?”

If “No”: “If that happens to change please let us know, our clinic chaplain is available for support.”

If “Yes” Ask: “Tell me what your concerns are.”

Current Focus: Screening Tool

Results of Screening Tool Pilot

• Proved clinician friendly
• Increased referrals
• Increased awareness of unmet emotional and spiritual needs
• Revealed commonality of spiritual distress needs identified
• Need ongoing evaluation of number of indicators marked

Lessons Learned

Screening

• Recognized the difference between screening and assessment
• Continue to evaluate appropriate groups of patients to be screened

Lessons Learned

Redesign Priorities from Hospital to Clinic Setting

• Philosophy ‘come to us’ to ‘we meet you where you are’
• Cannot simply export what exists in hospitals to the clinics
• Use new technology to connect chaplains with patients in clinics
Lessons Learned

Build Support
• Maintain consistent and various modes of communication with clinic team
• Need clinic leadership and key staff support

Be Adaptive
• Learn clinic culture/rhythm
• Build on what is present

Lessons Learned

Referrals
• Education is not enough to generate referrals
• Needed screening tools and “triggers” to ensure appropriate referrals

Lessons Learned

Chaplain Staffing for Clinics
• Technology enables coverage
  • Phone
  • Email
  • Electronic prayer requests
  • Referrals through clinic EHR
  • Future vision of telemedicine

Lessons Learned

Where to start
• Identify and build upon what strengths you already have
• Try something
• Pilot projects
  • Fail small, succeed BIG!
  • Build on successes
  • Clarify questions
Lessons Learned

Using Electronic Health Record (EHR)
- Referrals
- Communication
- Keeping track of patients
- Inpatient/Outpatient continuity of care

Lessons Learned

Emerging Chaplain Skills/Characteristics
- Passionate about ministry in clinic setting
- Proactive, autonomous/self-starter, independent yet team oriented
- Good communicator
- Confidence in professional expertise

Lessons Learned

Emerging Chaplain Skills
- Comfortable with new technology
- Be flexible/like variety
- Empowers/teaching
- Comfortable with multiple accountabilities
- Able to “close” patient intervention/relationship as needed

Questions
Table Top Discussion

1) Share your successes

2) Share your challenges