

MONITOR & SUSTAIN

# Six Building Blocks

*A Team-Based Approach to Improving  
Opioid Management in Primary Care*



- The Monitor and Sustain guide walks you through transitioning your organization from intensive opioid management improvement work to less intensive continuous improvement and sustainability.
- The guide walks you step-by-step through preparing for and facilitating a Success and Sustainability Meeting with your Opioid Improvement Team.
- To keep track of the Monitor and Sustain process, we suggest you use the checklists in this document.

### Stage 3: Monitor & Sustain

Assess and celebrate progress from baseline

Develop a plan for sustainability

Reassess evidence, guidelines, & regulations and revise approach as needed

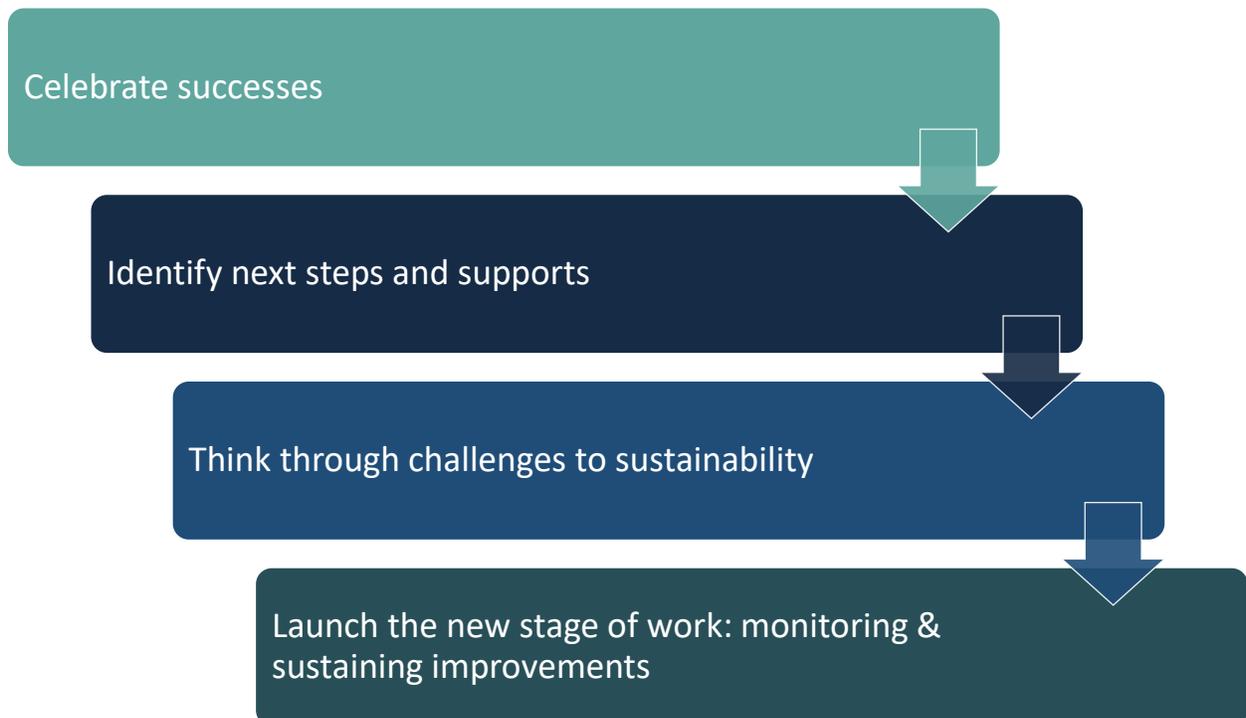
## Acronyms and Terms

The following acronyms and terms are used in this Workbook.

- **Agreement:** this refers to a Patient Agreement/Patient Contract
- **Clinic, organization, and site:** These terms are used interchangeably to refer to the organization implementing the opioid management improvements.
- **CDC:** Centers for Disease Control & Prevention
- **EHR:** electronic health record
- **LtOT:** Long-term opioid therapy, sometimes referred to as chronic opioid therapy (COT)
- **MA:** Medical Assistant
- **MAT:** Medication assisted treatment
- **MED:** morphine equivalent dose, also known as MME or morphine milligram equivalents.
- **PA:** Physician Assistant
- **PDMP:** state prescription drug monitoring program; also referred to as PMP
- **VA:** Department of Veterans Affairs

## Monitor & Sustain Process

An organization is ready to move on to the Monitor and Sustain Stage once they have completed the majority of their prioritized Six Building Blocks Design and Implement Milestones and they are feeling capable of continuing the improvement work with less hands-on time. Generally this happens about 6-12 months into the second stage, Design and Implement Stage. The Monitor and Sustain Stage takes about one month to put into place and then it is a continuous monitor and sustain process. It is a time to thoughtfully transition to less intensive focus on opioid management improvement while sustaining the successes achieved through the Design and Implement Stage.



# Monitor and Sustain Progress Tracking

Use this section to track progress through the Monitor and Sustain Stage.

## Activities

- Preparatory work for the Success and Sustainability Meeting

### Objective

Prepare to facilitate the Success and Sustainability Meeting.

- Facilitate a Success and Sustainability Meeting

### Objective

Take time to celebrate successes and think through next steps and a sustainability plan.

- Launch new stage of work: monitoring and sustaining success

### Objective

Ensure there is a plan in place to continue to provide quality care to patients on long-term opioid therapy.

# Preparatory Work Ahead of the Success and Sustainability Meeting

## Objective

Prepare for the Success and Sustainability Meeting.

## What's Going on During This Step

- Complete the *Measuring Outcomes Survey*.
- Prepare a summary of progress from baseline and potential next steps for the Opioid Improvement Team.
  - Review your Prepare and Launch Stage notes, baseline Self-Assessment summary, Kickoff Survey summary, the milestones checklist you have maintained, and the Measuring Outcomes Survey.
  - Use these documents to prepare the summary. Consider using the *Success and Sustainability PowerPoint template*.

# Success and Sustainability Meeting Overview

## Time

1 hour

## Objectives

Celebrate successes, identify potential next steps, and think through sustainability.

## Who Should Attend

Opioid Improvement Team

## Relevant Materials to Bring To This Meeting

- [Success and Sustainability slides](#)
- [Sustainability handout](#)
- [Monitor and Sustain activities checklist](#)
- [Relevant Six Building Blocks resources](#)

## Agenda

1. Celebrating successes
2. Next steps
3. Think through challenges to sustainability

# Success and Sustainability Meeting

## Content

Use the [\*Success and Sustainability slides\*](#) you updated to guide the Opioid Improvement Team through the content of this meeting.

### Celebrating Successes

- Review and celebrate key successes of the opioid management improvement work.
- Share any data that illuminates progress over time. For example, comparing baseline and end of project data from the [\*Measuring Outcomes Survey\*](#) or any [\*run charts\*](#) in use.

### Next Steps

- Reflect on challenges identified both at baseline and through the improvement process, as well as identified priorities. Celebrate progress and make a plan for any areas that present an opportunity for improvement.
- Review any milestones not yet achieved and develop a plan and supports for that work.

### Think Through Challenges to Sustainability

Consider the following sustainability concepts (from the [\*Sustainability Handout\*](#)) to help make a sustainability plan. The concepts were adapted from: [\*How to Build Sustainability into the Innovation Process | AHRQ Health Care Innovations Exchange\*](#).

#### Engagement

Continue to keep leadership, staff, and clinicians engaged in the process by:

- Continuing to share data related to opioid management publicly at clinician and staff meetings and promote success stories (both about patients and about improved work life) to remind everyone of the value of the work.
- Checking in at least annually to see if the processes are still working and that any new changes are in fact improvements (e.g., by scheduling regular check-in meetings or integrating this work into standing quality improvement processes).
- Continuing to identify ways that you can make changes in policies, agreements, workflows, tracking and monitoring, resources for complex patients, etc. in response to feedback. Ensure there are compelling reasons for any changes and that changes are supported and evaluated to see if a change results in an improvement.

## Education

Continue to educate staff and clinicians by:

- Integrating opioid management training into regular staff meetings, trainings, newsletters, etc. Training is not “one and done.”
  - Including opioid management training in onboarding. Make sure new staff understand the key opioid policies and processes and why they are important.
  - Continuing to provide opportunities for staff and clinicians to receive education on opioid management. Evidence-based medicine evolves. See the [Clinical Education Opportunities](#) resource for ideas.
  - Continuing to adapt and improve in response to new evidence-based guidelines. Educate clinicians and staff about the compelling reasons for any changes and involve them in developing and iterating new workflows to support the changes.

## Culture

If possible, integrate opioid management into a culture of patient safety and continuous improvement at your organization. One way to do this is to make reviewing measures a regular part of clinic activities.

## Measurement

By continuing to monitor opioid management measures and share them with key stakeholders (e.g., leadership, involved staff and clinicians), you are able to:

- Encourage continual buy-in for the processes.
- Identify if there is an issue that needs further investigation and adjustment.

## Infrastructure

Identify ways to “hardwire” your changes. You’ve done much of this already by writing policies and workflows and updating your EHR templates. You might also consider including tasks integral to maintaining the opioid management program in job descriptions.

## Staffing

Your opioid improvement team has been instrumental in keeping this work moving forward. But what if one of you leaves? It is important to have a back-up for key roles.

# Launch New Stage of Work: Monitoring and Sustaining Improvement Work

Below are suggested activities after transitioning to less-intensive opioid management improvement in order to continually improve quality of care for patients on long-term opioid therapy.

## Ongoing Activities

### Leadership & consensus

- Continue to protect time to monitor and sustain the work (e.g., include opioid management improvements in standard quality improvement processes)
- Continue to engage leadership, staff, and clinicians by regularly sharing opioid performance measure data and stories
- Periodically assess adequacy of resources needed to support opioid management processes and identify additional resources if needed
- Obtain feedback from staff and clinicians about what is working and what is not working and test approaches to address concerns
- Identify reluctant clinicians and staff and identify strategies to improve engagement
- Stay up to date with evidence-based guidelines and new regulations (Medicaid, CDC, state, etc.)

### Policies, patient agreements, & workflows

- At least annually, revisit and revise policies, patient agreements, and workflows, as needed based on feedback and new evidence, regulations, etc.

### Tracking & monitoring patient care

- Adjust and iterate best possible tracking & monitoring approaches

### Planned, patient-centered visits

- Offer educational opportunities in opioid management, empathic communication, and patient involvement to clinicians and staff
- Integrate opioid management processes into standard trainings, including onboarding new employees
- When workflows need development or updating, involve those who will do the work and do small cycle tests of change before implementing changes across the organization



### Caring for complex patients

- Ensure clear referral pathways for complex patient resources and close the loop on referrals
- If not already in place, consider providing opioid use disorder treatment within the clinic

### Measuring success

- Produce clinician-specific reports on measures and discuss during medical staff meetings
- Regularly review performance measure data at the level of the clinic during staff meetings and other opportunities
- Identify additional opportunities for improvement and implement small cycle tests of change