Data-Driven Health Equity: Strategies for Collecting Patient Data in Health Centers

Thursday, March 7, 2024
1:00 – 2:00pm Eastern | 10:00 – 11:00am Pacific

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The Weitzman Institute is Committed to Justice, Equity, Diversity & Inclusion

At the Weitzman Institute, we value a culture of equity, inclusiveness, diversity, and mutually respectful dialogue. We want to ensure that all feel welcome. If there is anything said in our program that makes you feel uncomfortable, please let us know via email at nca@chc1.com

Moses Weitzman Health System Affiliates

National Training and Technical Assistance Partnership
Clinical Workforce Development

Provides free training and technical assistance to health centers across the nation through national webinars, learning collaboratives, activity sessions, trainings, research, publications, etc.

Team-Based Care
- Fundamentals of Comprehensive Care
- Advancing Team-Based Care

Training the Next Generation
- Postgraduate Residency and Fellowship Training
- Health Professions Training

Emerging Issue
- HIV Prevention

Advancing Health Equity

Preparedness for Emergencies and Environmental Impacts on Health

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Chief Diversity, Equity and Inclusion Officer
Moses/Weitzman Health System

Objectives

- Develop a foundational understanding of how to utilize key identity data to advance Justice, Equity, Diversity, and Inclusion (JEDI) goals

- Recognize the importance of collecting key identity data in addressing health disparities

- Outline strategies for collecting comprehensive demographic data to develop and monitor equity plans impacting health outcomes

Moses/Weitzman Health System JEDI Office

- **JEDI Office**: Small, but Mighty!
  - 1 Chief Diversity, Equity & Inclusion Officer (CDEIO) + 1,200 partners across the organization
  - Promotes the expectation that JEDI work is EVERYONE's responsibility
- JEDI Commitment Statement:

  Moses Weitzman Health System Inc., and affiliates, are committed to advancing its values of justice, equity, diversity, and inclusion (JEDI) across the organization. We acknowledge, embrace and value the diversity and individual uniqueness of our patients, students, employees and external partners. MWHS strives to foster a culture of equity and inclusion in broad and specific terms.

  Our commitment to JEDI presents itself in our quality health care delivered to our patients, our passion for inclusive excellence for our employees, the learning environment we foster for our students, and the attention paid to our equitable and inclusive policies and practices across the organization.

# Poll: Does your organization have difficulty collecting patient identity data?

- Yes
- No
- Unsure

Collecting the Right Data for the Right Reasons

- Collecting key identity data is crucial for addressing health disparities and improving patient outcomes

- Enables organizations to develop interventions precisely aligned with patient needs

- Helps understand shared community needs, including the profile of prevalent conditions

- Report key identity data to the Uniform Data System (UDS) if FQHC/FQHC look-alike, and to other entities that require such data

Health Equity

"Health equity is the state in which everyone has a fair and just opportunity to attain their highest level of health. Achieving this requires focused and ongoing societal efforts to address historical and contemporary injustices; overcome economic, social, and other obstacles to health and healthcare; and eliminate preventable health disparities"
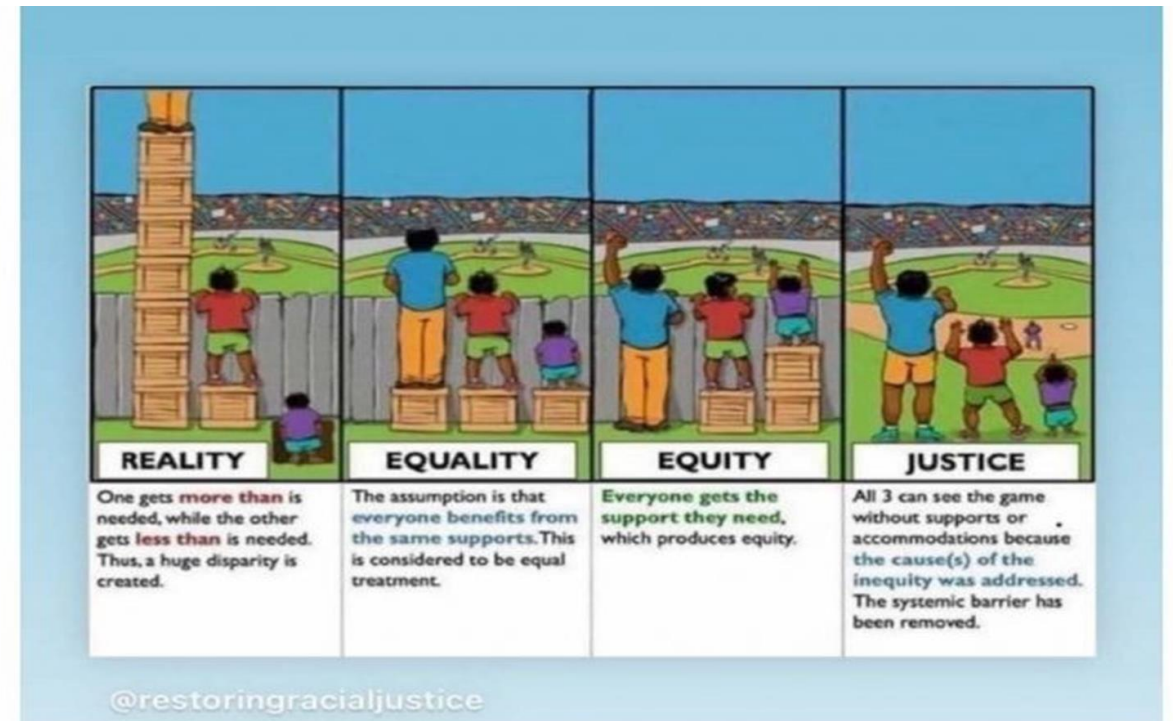
(Centers for Disease Control & Prevention, 2022)

Achieving health equity requires that we:

✓Identify health disparities across all identities

✓Screen for and address social determinants of health that contribute to health disparities

✓Recognize the history of unethical healthcare practices and their lasting impact on the health outcomes for members of certain groups

✓Collect identity data in order to understand who our patients are for the purpose of developing appropriate and equitable practices and interventions

✓Allow the data to guide the development interventions

How are identity data used to achieve health equity?

To ensure access to care

Available identity data have been used to document important differences in access between identity groups

Supports targeted efforts to promote access to care within those communities which seek primary care at a lower rate

https://www.ncbi.nlm.nih.gov/books/NBK215740/

Note…

- It is important to understand, however, the practice of collecting key identity data or describing health care disparities, alone, do not lead to better health outcomes or clinical experiences for patients

- Key identity data must be incorporated into the development and implementation of policies and practices in order to effectively address health disparities

AND…strive for the data to be complete, reliable, and robust

Sample

If we consider only patients who report their race, 25% are identified as Black/African American.

Patients By Race & Ethnicity	
% Racial and/or Ethnic Minority Patients	
% Black/African American Patients	25.44%
% Hispanic/Latino Patients	
% Non-Hispanic White Patients	
% Asian Patients	
% Native Hawaiian/Other Pacific Islander Patients	
% American Indian/ Alaska Native Patients	
% More than one race Patients	

If we include all patients, regardless of available race data, 12% are identified as Black/African American.

Patients by Race & Ethnicity (where denominator includes patient of unknown race or ethnicity)	
% Racial and/or Ethnic Minority Patients	
% Black/African American Patients	12.47%
% Hispanic/Latino Patients	
% Non-Hispanic White Patients	
% Asian Patients	
% Native Hawaiian/Other Pacific Islander Patients	
% American Indian/ Alaska Native Patients	
% More than one race Patients	

Developing a Data Collection Strategy

✓Establish precise goals and objectives for the data collection process

✓Determine the specific data points or information you need to collect

✓Consider target audience and ensure approach is respectful and inclusive

✓Choose suitable data collection methods

✓Develop effective data collection tools

✓Pilot

Establishing Goals and Objectives

➢ Assess any existing plans or strategies to build upon prior work

➢ Conduct a needs assessment to identify current challenges or gaps

➢ Gather input from partners involved in different parts of the process

➢ Consider regulatory requirements for reporting identity details

➢ Define measurable objectives that demonstrate progress on each goal

➢ Establish realistic timeframes to track objectives over time

➢ Pilot objectives on a small scale initially before organization-wide

➢ Revisit goals and objectives periodically based on feedback and lessons learned

Determining Key Identity Factors

- Reference regulatory requirements such as UDS data

- Incorporate common demographic elements like race, ethnicity, gender, etc.

- Think about social factors that have an impact on health

Key Data Point Examples

Age

Race

Ethnicity

Sexual Orientation Gender Identity and Expression (SOGIE)

Disability

Education Level

Socioeconomic Status

Veteran Status

Citizenship

Consider Target Audience

➤ Understand who your organization serves (demographic, languages, cultures, etc.)

➤ An inclusive approach promotes equity, access, and trust

➤ Assess needs through community input/surveys in multiple languages

➤ Enable self-reported identification using broad categories that encompass diversity

➤ Explain that any data sharing complies with privacy laws and anonymous aggregate information is used for analysis, not individual records

Which roles or departments may contribute to the process of collecting identity data?

JEDI Office	Populations Health	IT
Operations	Communications	Telehealth
Clinical Leaders	Regional Vice Presidents	Data Team

Data Collection Infrastructure

Action Steps:	
Ensuring Systems Can Collect Data Appropriately	Developing Processes Across IT and Operations Departments
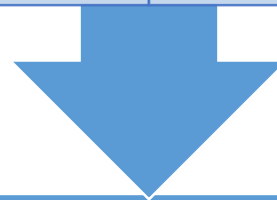
Recommended Departments:	
IT	Operations

Language and Messaging

Action Steps:	
Establish a slogan	Develop consistent messaging to be used across the organization

Recommended Departments:	
Involvement of Data Team	JEDI

Language and Messaging Examples:

"EQUITY: We Do the Just Thing"

Hartford Healthcare

"We Ask Because We Care"

Yale New Haven Health

"Working Together for a Healthier Philadelphia"

Temple Health

Messaging and Collateral

Action Steps:

| Record educational videos to play on waiting room monitors at each of the sites | Record telephone messaging for callers to hear while on hold | Add messaging to Patient Portal | Develop promotional signage for sites, tabling events and other distribution | Purchase buttons, lanyards, etc. for patient facing employees |

Recommended Departments:

| JEDI Office | Communications | Telehealth | IT |

Sample Messaging for Patient Portal

*At **organization name**, we collect information about our patients' race and ethnicity to understand and help with their health needs. This helps us see patterns in health outcomes for different groups.*
Add slogan

Poll: Does your organization train staff on why you collect identity data and how it relates to health equity?

- Yes

- No

- Unsure

Staff Training

Action Steps:

Provide training on the importance collecting race and ethnicity data and the relationship to health equity	Train appropriate staff on how/where to collect the data

Recommended Departments:

JEDI Office	Operations	Clinical Leaders

Communication, Promotion & Outreach

Action Steps:
Utilizing Various Platforms - Webpages, Patient Portal, Emails, Meetings

Recommended Departments:			
Communications	IT	Leadership	All Employees

Data Analysis and Reporting

Action Steps:	
Develop a plan for analyzing and interpreting the collected data	Reviewing with Key Stakeholders

Recommended Departments:			
Populations Health	IT	Regional VP's	Data Team

Continuous Improvement

- Action Steps:

  - Establishing mechanisms for ongoing evaluation and feedback to improve the data collection process

  - Review and update strategy based on lessons learned and evolving best practices

  - Continuously engage with patients and the community to ensure the strategy remains relevant and effective

- Recommended Departments:

  - Data Team, Operations, IT, All Employees

Questions?

Wrap-Up

Scan to learn more about
Dr. Oliveira and JEDI at
Moses/Weitzman Health System!

Comprehensive & Team-Based Care Learning Collaborative

- Free eight-month participatory experience designed to provide knowledge, tools, and coaching to support health centers and look-alikes in improving a UDS measures by implementing a model of team-based care

- Outcomes of the learning collaborative:
  – Identified a clinical team to work on a quality improvement project
  – Improved UDS measures, such as hypertension, cancer screenings, etc.
  – Implemented pre-visit planning and morning huddles
  – Integrated behavioral health with warm welcomes/handoffs

- For more information/questions, please reach out to Meaghan Angers (angersm@mwhs1.com) or click here!

Team-Based Care

- **Fundamentals of Comprehensive Care**
- **Advancing Team-Based Care**

Explore more resources!

National Learning Library:
Resources for Clinical Workforce Development

https://www.weitzmaninstitute.org/ncaresources

Health Center
Resource Clearinghouse

https://www.healthcenterinfo.org/
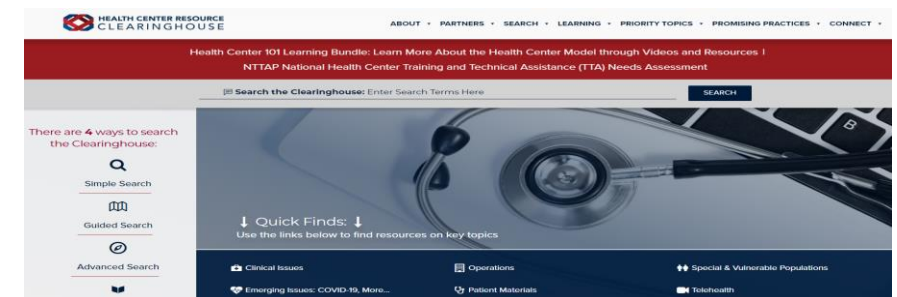
Contact Information

For information on future webinars, activity sessions, and learning collaboratives: please reach out to nca@chc1.com or visit https://www.chc1.com/nca