Implementation of a Transition Readiness Assessment and Transition Discussion Documentation in a Type 1 Diabetes Clinic

Sonalee Ravi

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Implementation of a Transition Readiness Assessment and Transition Discussion Documentation in a Type 1 Diabetes Clinic

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What are the barriers to transition?
## Transition Assessment

- Patients rate six areas of knowledge and eight skills

<table>
<thead>
<tr>
<th>Knowledge</th>
<th>Skills</th>
</tr>
</thead>
<tbody>
<tr>
<td>• I can describe my medical problem</td>
<td>• I refill my prescriptions by myself</td>
</tr>
<tr>
<td>• I can list my medical history</td>
<td>• I take my prescriptions by myself</td>
</tr>
<tr>
<td>• I can talk about how my medical problem could affect my sex life</td>
<td>• I can get to my doctor appointments on my own</td>
</tr>
<tr>
<td>• I can talk about how alcohol, drugs or cigarettes could affect my medical problem</td>
<td>• I talk with my doctor by myself</td>
</tr>
<tr>
<td>• I can tell someone what health insurance plan I have</td>
<td>• I keep a list of my medical problems</td>
</tr>
<tr>
<td>• I can list my medications</td>
<td>• I can recognize an emergency for my health problem</td>
</tr>
<tr>
<td>• I can tell someone how my medications work</td>
<td>• I carry my health insurance card every day</td>
</tr>
</tbody>
</table>

- Yes! I can do this
- I am learning how to do this
- I want to learn how to do this
- Someone else will have to do this. Who?
- N/A
Goals

- Patients rate confidence in ability to transfer care successfully prior to age 22.
- Patients select a goal for their next visit.

Rate on a scale of 1-10

- How important is it to you to prepare for/change to an adult doctor before age 22?
- How confident do you feel about your ability to prepare for/change to an adult doctor?

Goals

- Create a 3-sentence summary describing my medical condition.
- Be able to describe my medical condition and care I have needed.
- Provide a list of my medications.
- Explain how alcohol and drugs can affect my medical problem.
- Know when to ask for help in an emergency.
- Carry my insurance information and list of medical providers.
- Create a My Health Passport.
- Enroll in Patient Portal.
- Find an Adult Provider.
Discussions are documented in the medical record.
Aims

• Our aim was to implement this assessment with a 20% documentation rate after six months.
**Timeline**

- **Mar. 2021**: Added three diabetes-specific questions to the assessment tool
  - Insulin adjustments
  - Sexual function/pregnancy
  - Diabetes emergencies

- **Mar. 2021**: Trained providers and diabetes educators about the need for transition planning, the differences between transition planning and transfer, and the need for documentation.

- **May 2021**: All patients 17-years and older were asked to complete the transition assessment prior to their clinic visit.

- **June 2021**: Emails jointly sent to providers and educators the Friday prior to visit indicating patients who needed transition assessments.

- **July 2021**: Charting flow change to add quick access to the documentation form.
Results

Documentation rate over time

March: 4.81
April: 11.25
May: 21.05
June: 14.49
July: 40.54
August: 43.75

Percent Documented
Goal
Future Directions

Different surveys for 12-14 years, 15-17 years and 18+
- Developmentally appropriate knowledge and skills

Utilize the transition assessment as a skills tracker for targeted education

Webinar implementation for education topics
- Complications and Screening
- Driving
- High Risk Behaviors
- Prescription Management
- Type 1 Diabetes Refresher
- College Transitions and Accommodations
- Pregnancy and Diabetes
How to Find a Provider

Insurance and Finances

- Does the office accept your insurance? The list of adult providers is not complete. A list of covered providers can usually be found on your insurance provider's website. It's best to confirm with the office.
- Is there financial assistance available (e.g., payment plans for out-of-pocket costs)?
- What happens if you are admitted to the hospital? Does the office provide consultation services at certain hospitals, and if so, are you comfortable going there? Do they do this in person or over the phone? Is this the hospital in-network with your insurance provider?
- Does the office charge you to fill out additional forms (e.g., FANLA paperwork)?
- Does the office charge a fee if you miss an appointment? Please review office policies when scheduling your first (or consecutive) appointment.

Diabetes Devices/Lab Work

- Does the clinic download your device's log (e.g., meter/CGM pump/Bluetooth connected pod) or do you need to do that from home prior to the visit?
- Will the clinic obtain your lab or do you need to go to an outside lab prior to your Queen Diagnostics visit? They often order other labs in office as well?
- Will they provide for classes or information packets on new devices (e.g., meter/CGM/pump/Bluetooth connected pod)?

Office Details

- Do you know other adults with diabetes? Consider asking their recommendations. There are social media groups available for networking:
  - JDRF Kansas City Adult Type 1 (Facebook)
  - Kansas City Type 1 Diabetes Support (Facebook)
- Did you know you can schedule a visit just to meet the doctor and talk? There may be a fee for their time.
- How far is the office from where you live? Do you have transportation to your appointments or resources to obtain transportation? Are Walk-in options available (especially useful for college students, etc.)?
- New patient visits usually take longer, but how long is a typical follow-up appointment? Consider wait times.
- Does the office have a system for reminding you of your appointment? Do they call, text, or email?
- Is there an electronic method of communication with the clinic or access to records (e.g., patient portal)?
- Is your priority to see the same provider every time or to have the most flexibility for your schedule? How far in advance do you need to make routine appointments?
- Who will you see at appointments? Kaihatta, Diabetic Educators/Physician/Physician Assistant/Nurse Practitioners? Do you have access to support staff between appointments? Does the clinic have an after-hours line for emergencies? Does the office offer "urgent" or "test" appointments?
- Is there an option to participate in research studies?
Team Members

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