CWC PCN physician Monday.com boards

PHYSICIAN USER GUIDE

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CWC PCN physician members

Accessing your account

Account login

- Go to https://cwcpcn.monday.com
- Input login details
  - For first access, an email will be sent from Monday.com with an invitation to join.

Account set-up (first time only)

- An email will be sent from Monday.com on behalf of the team member inviting you to join (your Health Information Coordinator, Quality Improvement Coordinator, etc.).
- Clicking **accept invitation** will bring you to Monday.com to join your PMH board.
- A sample invitation email can be seen below:
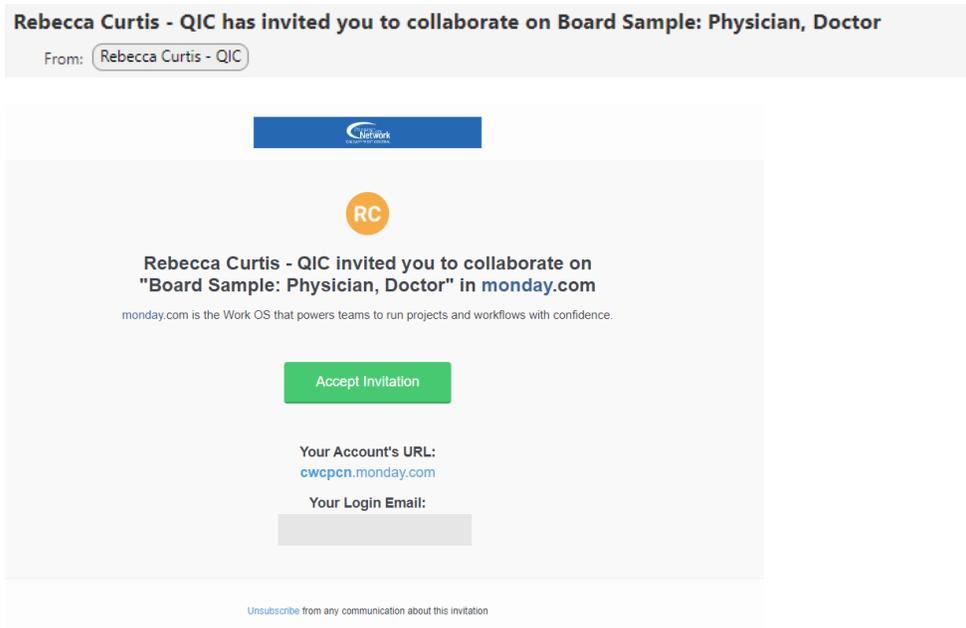
Figure 1: Sample Monday.com invitation email

- After clicking **accept invitation,** you will be directed to the following screen:
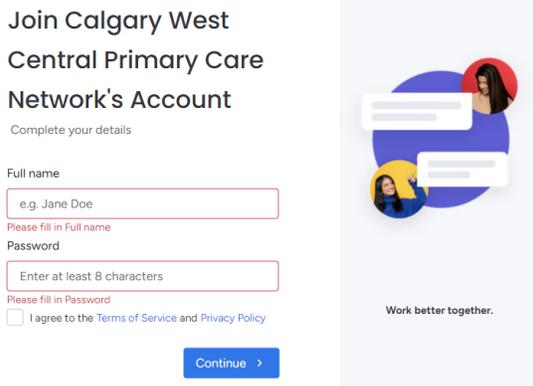
Figure 2: Sample screen for joining Monday.com from the invitation email

- Enter your full name (what will be displayed on Monday.com for your teammates), and a password you will use for subsequent logins.

Navigating Monday.com

Monday.com sidebar navigation

- Monday.com functions like a virtual filing cabinet, with different levels and groupings, called **workspaces.**
    - Physician boards will be found in the PMH QI workspace.
- Icons on the sidebar (see below) are used to navigate around the Monday.com website:
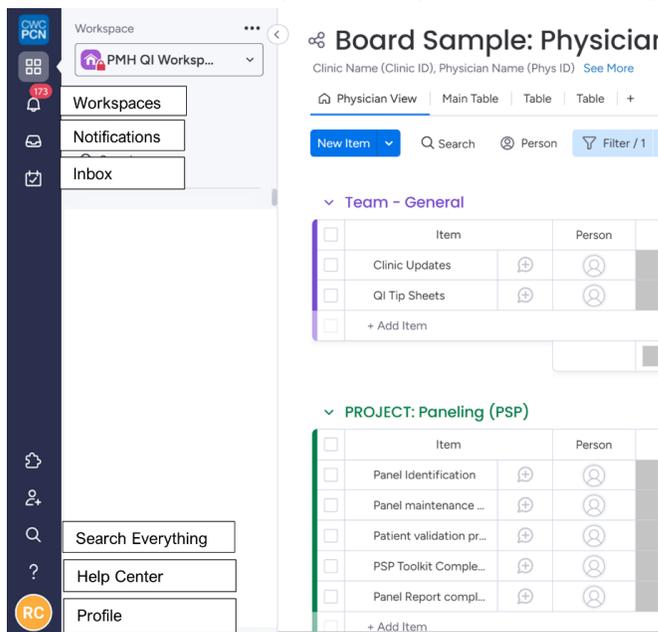
Figure 3: Monday.com navigation — sidebar icons with labels superimposed

- **Notifications —** the bell icon ⌂ opens a list of notifications specifically relevant to you: any replies to updates you authored, being "@" mentioned by a teammate, assignments, etc.

- **Inbox** — the mail icon ▢ shares all updates to your board(s), regardless of whether you are specifically noted in the update. This allows an overview of what your team is working on for any subscribed board.

- **Search everything** — the magnifying glass icon 🔍 provides the ability to search within anything you have access to (any board you may be on), including all updates, messages, files, etc.

- **Help Center** — the question mark icon ❓ provides articles and videos about Monday.com.

- **Profile** — the circle with your initials or a photo on the lower left of the screen 🔴 launches the account menu, where you can change notification preferences, your display name, or additional information.

  - *The default notification settings will send an email when you have been specifically mentioned — this allows you to monitor your emails instead of needing to log in for updates.*

Board Overview

- A **board** is a page specific to each physician and their CWC PCN team.

  - Additional clinic staff (e.g., clinic manager) can be added at a physician's request.

- Each board depicts any active PMH-related goals or work being supported by the CWC PCN PMH team and serves as both a communication and project management tool.

- Boards are organized into "groups" of items – each **group** represents a single project or project area (see Table 1, below)

- **Rows** within a group highlight project plan elements or steps to achieve the goal.

- **Columns** indicate if a person is assigned to the task, item status, dates for the goal, and/or any attached files.

  - Additional documents may also be found as an icon under the **Files** column.
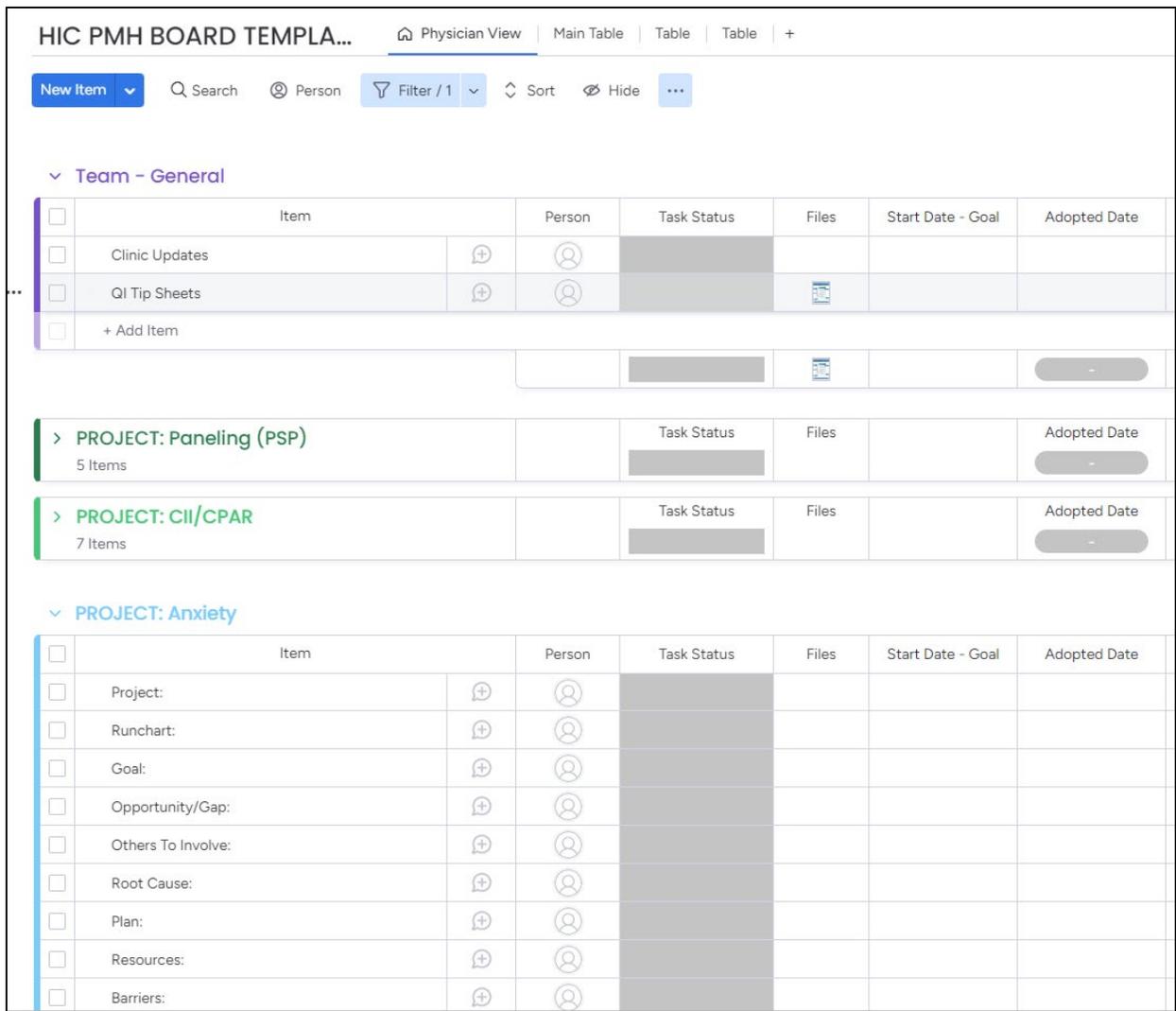
Figure 4: Screenshot of sample PMH physician board

Table 1: PMH physician board standardized group names

Group name	Brief description
Team – General	Includes clinic updates, clinic profile, and QI tip sheets
PROJECT: Paneling (PSP)	Standard steps to achieve paneling as per the Panel Support Program (PSP)
PROJECT: CII/CPAR	Standard steps for onboarding and support to Community Information Integration and Central Patient Attachment Registry (CII/CPAR)

PROJECT: Anxiety	Each project is listed individually and in alphabetic order of condition Each additional project labelled with consecutive numbers *i.e., if there are two active diabetes related projects with separate goals, they would be indicated as* *PROJECT: Diabetes* *PROJECT: Diabetes 2*
PROJECT: Asthma	
PROJECT: COPD	
PROJECT: COVID 19 GOALS	
PROJECT: Depression	
PROJECT: Diabetes	
PROJECT: Heart Failure	
PROJECT: Hypertension	
PROJECT: Opioids	
PROJECT: Osteoporosis	
PROJECT: Smoke cessation	
PROJECT: Women's health	
PROJECT: Individual physician goals	Projects not captured by the chronic condition/MH areas above
PROJECT: Screening run chart	If a run chart captures more than one screening maneuver, the run chart can be found in this group
PROJECT: Screening – Blood pressure	Projects related to the ASaP screening maneuvers, in order of the ASaP menu
PROJECT: Screening – Height	
PROJECT: Screening – Weight	
PROJECT: Screening – Exercise assessment	
PROJECT: Screening – Tobacco assessment	
PROJECT: Screening – Pap	
PROJECT: Screening – Mammo	
PROJECT: Screening – CRC	
PROJECT: Screening – Diabetes	
PROJECT: Screening – Lipids	
PROJECT: Screening – CV risk	
PROJECT: Screening – CPx	Projects for other common screening goals CPx – complete physicals AAA – abdominal aortic aneurysm
PROJECT: Screening – Vaccinations	
PROJECT: Screening - AAA	

Project documentation

- Paneling and CII/CPAR project have a standard set of steps.

- All other projects (e.g., screening, diabetes) are documented according to a series of **prompts,** informed by CPSA PPIP action plan.

  - *See accompanying document **Monday Physician Board Action Plan 2023** for specific details on how the prompts align with the PPIP Action Plan requirements.*

- **Prompts** ensure appropriate and consistent information is documented for all physician goals.

Table 2: Prompts used for PMH physician board project details

Prompt	Details/explanation
Project status:	- The general project title will be entered as the main item under a CDM heading - This item is where the overall status of a project will be tracked
Run chart:	All projects contain a run chart at the top so team members can easily access it
Goal:	- Indicates the SMART goal for a project - Smart goals are specific, measurable, attainable, relevant/realistic, and timely.
Opportunity/gap:	Addresses the intention of a project goal
Others to involve:	Indicates any PCN or clinic team members who will need to be included in the project plan development and updates
Root cause:	Identifies the baseline issue that is contributing to the opportunity/gap
Plan:	Generic summary of the plan, that will be detailed in STEPs below
Resources:	Lists any resources that will be needed for achieving the goal and measuring success (team members, materials, tracking)
Barriers:	Indicates any barriers that may interfere with achieving the goal
Mitigation:	Determines how we can address some of the barriers within our control to achieve the goal

Strategies for success:	• Brainstorm ideas on how to have this goal endure over time, and to positively sustain change
Project review in:	• Determines the next check point for the project to assess success
Step:	• Includes as many steps as needed to indicate the detail of the plan • Each individual task will be indicated with STEP, as well as be assigned to the relevant team member
Action:	• Determines how the project will be adopted, adapted, or archived based on goal progress
Step:	• If there is an ADAPTATION to the project, new steps will be indicated, followed by another ACTION
Action:	• End action will either be the adoption of a project **or** archival • If adopted, ongoing status with time for repeated work as steps will be indicated • If archived, details will be given as to why

Communications

Board use and management

- Health Information Coordinators (HICs) oversee the board — ensuring it is up to date and accurately reflects any ongoing projects.

- Physicians and team members can add comments or questions using the small quotation bubble found on any line ⬭ which opens **updates**.

Figure 5: Location of the quotation bubble to access comments and updates

- To ensure a team member is notified, **tag** the member using the "@" symbol followed by their name of click @ Mention , then choose a team member from the drop-down menu.

- o Mentioned team members will receive a notification to their notification inbox or email depending on their preferences.

- Comment on an update with a **thumbs up** 👍 Like , or ↩ Reply with GIFs, files, emojis, and @mentions. Check who has seen an update by putting your mouse on the eye icon 👁 1 Seen under your update.

- The **task status column** indicates the current state of a given step. Definitions of the different status labels can be found below. Statuses are based off both project management and QI terminology.

Table 3: Task status definitions (colour corresponds to colour on Monday.com board)

Used for	Table status label	Definition
Prompts determining project details and individual steps	Blank	Current status still to be updated or determined
	Complete	Task has no additional follow up needed; done
	In progress	Task actively being completed, actioned, or confirmed for details
	Stalled	Task has been delayed; may occur for various reasons and additional detail will be provided as an update *Note: This status sends a notification to the Quality Improvement Consultant for additional support*
	Stuck/support needed	Task has been halted, often due to external factors and troubleshooting is necessary *Note: This status sends a notification to the Quality Improvement Consultant for additional support*
	Ongoing	No confirmation or decision making needed, the task will remain active and continue as is for a certain time duration (usually found in the comments) *e.g., Run Chart is Ongoing (will be updated on monthly basis by team member)*
Prompts regarding overarching project status	Archived	Project or task will no longer be pursued. This may be a result of a change in priorities,

(e.g., Project Status & Action)		resources, or eligibility. Archived projects can be revisited once resources are available again.
		e.g., During COVID, many screening projects were archived as preventative care screening was unavailable. These projects were archived, as we could not actively support or were supporting higher priority goals at the time, but were reinstated once screening resources returned.
	Adapted	QI terminology that follows an 'action' prompt; indicates that a goal has been assessed according to a pre-determined review timeframe, and progress is being made. Process may need to be adapted or edited to fully achieve the goal. Additional steps or project support will continue until project is **adopted** or **archived.**
		E.g., clinic has a goal for decreasing the number of patients on a wait list. At a review point, we are making progress towards but have not reached the SMART goal defined. To reach the goal, an additional step of adding a reminder phone call will be added to complete an intake form. Project will be reassessed at the next review point to see if further adaptation is needed, or whether the project can be adopted in achieving its goal.
	Adopted – completed	QI terminology that follows an 'action' prompt; indicates that a goal has been met and all steps are completed of the finite process.
		E.g., No ongoing related work is required, the goal has been achieved.
	Adopted - ongoing	QI terminology that follows an 'action' prompt; indicates that a goal has been met and steps are now being completed as part of a continuing clinic process.
		E.g., project involving patient outreach achieved the project goal, this process will now be 'adopted' into typical clinic processes and continue for maintenance purposes. The work will continue, but the goal has been achieved.

Date columns

- Start Date – Goal
    - Refers to the date that a particular goal, task, or line has been initiated
- Adopted Date
    - Refers to the date that a particular goal, task, or line has been completed

Ongoing communications

- Each month, Monday.com will send an automated update for your physician board to the email used for your login
- These reminders allow easy access to your board on an ongoing basis, though no action is necessary
- Sample e-mail text:

Your PMH Physician Board [NAME] is available for review if you would like an update on our team's progress towards your PMH goals. This is an automated monthly reminder of where to find your information. Review is not required, but a tool available to you at any point.

If you have any questions, please feel free to reach out to your PMH team member for more information.