

STAFF ROLES & RESPONSIBILITIES VISUALIZATION EXERCISE*



MATERIALS:

- Candy
- Cups with the following staff roles: **Provider, RN, LPN, Care Coordinator, Front Desk, QI, Referrals, No One**

INSTRUCTIONS:

- For each of the below staff responsibilities, put a piece of candy in the cup for the staff member who currently completes that activity
- If more than 1 person performs the activity, put candy in all staff cups who complete the activity

STAFF RESPONSIBILITY:

1. Who **EDUCATES** patients on the healthy eating and lifestyle change options?
2. Who **DISCUSSES** available lifestyle change and self-management programs?
3. Who **ADMINISTERS** an A1c point-of-care test?
4. Who **CREATES** a referral in the EHR for an internal or external lifestyle change and self-management program?
5. Who **SCHEDULES** appointments with those internal or external programs?
6. Who **FOLLOWS UP** to make sure patients attend their appointments or classes with internal or external staff or partners?
7. Who **OBTAINS** patient progress related to attendance, outcomes such as weight loss, etc?
8. Who **PRINTS** and **DISTRIBUTES** pre-visit planning reports for teamlet huddles?
9. Who **LEADS** daily huddles?
10. Who **PARTICIPATES** in daily huddles?

DISCUSSION QUESTIONS

At the end of the exercise, the group will probably discover that most of the jelly beans end up in the primary care provider's cup. Facilitate a discussion using the following prompts:

1. What do you notice about how tasks are distributed?
2. What implications do you think this has for your care team?
3. What are realistic ways to more evenly redistribute tasks?
 - How would you make these changes possible?
4. Why are there jelly beans in the "No one" cup?
 - What can you do about that?
 - How would this affect your workflow?

**Adapted from the Institute for Health Improvement: Health Systems (The Next Generation of the Planned Care Model) October 4-6, 2011*