

Community Health Worker Evidence-based Omaha System Guideline

Karen A. Monsen

MN CHW Alliance Conference

May 23, 2018

Omaha System Community of Practice

University of Minnesota Center for Nursing Informatics



SCHOOL OF NURSING

UNIVERSITY OF MINNESOTA

Acknowledgments

- Faten Alfaifi
- Jonathan Alquiza
- Shaherah Andargeery
- Bette Bogdan
- Casey Borgen
- Christine Bullerman
- Rosemary Chaudry
- Michelle Chiezah
- DeAnn Crompt
- Amber Dallwig
- Mary Doran
- Megan Ellingson
- Kristin Erickson
- Erna Folta
- Alexandra Garcia
- Yaneisy Griego
- Jean Gunderson
- Elizabeth Hainke
- Meridyth Henry
- Diane Holland
- Roxanne Jelinski
- Rosaura Jimenez
- Jessica Kalicki
- Erin Karsten
- Kathy Karsting
- Sura Kaya
- Noreen Kleinfehn-Wald
- Dorcas Kunkel
- Luis Lagos
- Jody Lien
- Melinda Loya
- Marylyn McEwen
- Kari Miller
- Karen Monsen
- Igor Nestratil
- Gary Oftedahl
- Lux Phatak
- Susan Pinnock
- Heather Pint
- Barbara Piskor
- Wendy Potratz
- Kay Poulsen
- Shalena Prude
- Julie Richter
- Alberto Rivadeneyra
- Emily Robb
- Meredith Rush
- Theresa Schmidt
- Colleen Scully
- Selda Secginli
- Mark Siemon
- David Smith
- Yuriana Soto
- Mary Elaine Southard
- Nicole Sowers
- Sadie Swenson
- Patty Takawira
- Chris Tauer
- Anna Terry
- Doug Toft
- Lisa Vasilj
- Marisa Wilson
- Feng Zhi Yan
- Medine Yilmaz
- Bev Zabler
- Champ Software



Whereas:

- Community Health Workers (CHWs) are members of the community they serve.
- They build relationships and trust at the grassroots level and bridge the gap between individuals, families and communities and the health and human services systems.
- CHWs work in clinical and community settings to provide these linkages.
- CHWs teach community members and providers the knowledge and skills needed to understand, give, and receive appropriate care and service options.
- Thus, CHWs are essential team members who promote the health of populations at risk of poor health outcomes.



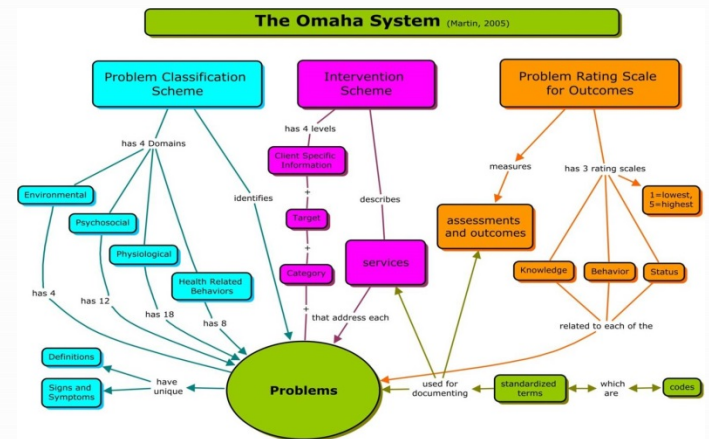
Therefore:

- Community Health Workers should have access to and training for use of evidence-based guidelines that support documentation for their important contribution to the health of individuals and communities



The Omaha System

- Rigorous standardized terminology
- Multi-disciplinary
- Widely used in community
- Holistic perspective
 - Environmental
 - Psychosocial
 - Physiological
 - Health-related Behaviors
- Robust evidence-based guideline process including guidelines for community care



OmahaSystemGuidelines.org

Omaha System Guidelines

Home

Social and Behavioral Determinant...

Community Dwelling Elders

More ▾



Omaha System Guidelines

Welcome to Omaha System Guidelines

The purpose of the Omaha System Guidelines Web site is to provide evidence-based practice (EBP) guidelines/standardized care plans in coded format for use by healthcare practitioners and consumers. These Omaha System/SNOMED CT guidelines were developed using crowd-sourcing techniques by numerous stakeholders including scholars, clinical experts, and Omaha System experts.

The Omaha System Community of Practice provides the venue for review of guidelines. Omaha System users globally participate in the development and review of guidelines. All guidelines on this web site have been approved by the Guidelines leadership: Karen Monsen, Amy Lytton, and Karen Martin. For further information on how you can participate in this exciting project, please contact



SCHOOL OF NURSING

UNIVERSITY OF MINNESOTA

CHW Guideline Process

- 75 participants
- 4 or more countries
- CHWs, CHW educators, public health departments, academia, EHR industry
- Three on-line working meetings in 2018
 - Sources
 - Peer review
 - Consensus



Sources

- Mayo Clinic Community Health Worker Social Determinants of Health Tool
- Social and Behavioral Determinants of Health Omaha System Guideline
- Family Home Visiting Omaha System Guideline and Core Interventions Guideline



Omaha System Concepts in the CHW Guideline

Environmental

- Income
- Sanitation
- Residence
- Neighborhood/workplace safety

Psychosocial

- Communication with community resources
- Social contact
- Caretaking/parenting
- Mental health
- Abuse

Physiological

- Cognition

Health-related Behaviors

- Nutrition
- Physical activity
- Substance use
- Personal care
- Health care supervision
- Medication regimen



Omaha System CHW Observations

- Problem-specific observations are provided in easy list format (select all that apply)
- Knowledge, Behavior, Status ratings may also be selected for each problem concept
- Emerging documentation of strengths for each problem concept



Interventions

- 88 unique interventions
- 4 Action Categories
 - Teaching, Guidance, and Counseling
 - Treatments and Procedures
 - Case Management
 - Surveillance
- 32 Targets that specify the intervention

anatomy/physiology	environment	medication coordination/ordering	signs/symptoms - physical
behavior modification	finances	other community resources	social work/counseling care
caretaking/parenting skills	home	paraprofessional/aide care	substance use cessation
communication	interaction	personal hygiene	supplies
continuity of care	legal system	safety	support group
coping skills	medical/dental care	screening procedures	support system
dietary management	medication action/side effects	sickness/injury care	transportation
education	medication administration	signs/symptoms - mental/emotional	wellness



Environmental Domain

Income	CM	finances	community resources/governmental health/social service assistance/office of child support enforcement; facilitate access to services, serve as liaison
Income	S	finances	employment, income vs expenses, food insecurity; housing insecurity; use of available resources, seasonal
Income	TGC	finances	crisis intervention/short-range planning; budgeting; community resources
Income	CM	medical/dental care	coordination among providers; facilitate access to health insurance/payment, serve as liaison
Income	S	medical/dental care	health insurance
Income	TGC	medical/dental care	health insurance, payment for health care services
Sanitation	S	environment	living conditions, e.g. mold, insect activity
Sanitation	TGC	environment	healthy homes, sanitation abatement practices
Sanitation	CM	environment	resources for sanitation abatement
Residence	CM	home	housing resources; facilitate access to services, serve as liaison
Residence	S	home	appropriateness for needs
Residence	S	safety	environmental, safety, physical hazards
Residence	TGC	home	housing resources
Residence	TGC	safety	recommendations
Neighborhood/ workplace safety	CM	other community resources	formal supports; facilitate access to services, serve as liaison
Neighborhood/ workplace safety	S	safety	safety hazards, crime, dangerous individuals, lighting, sidewalks
Neighborhood/ workplace safety	TGC	safety	discuss, review, update formal or informal safety plan



Psychosocial Domain

Communication with community resources	CM	continuity of care	coordination among providers; facilitate access to services, serve as liaison
Communication with community resources	CM	legal system	coordination among providers, probation, employment, other legal situation
Communication with community resources	S	communication	ability to interact with community resources; language preference
Communication with community resources	S	transportation	ability to access community resources
Communication with community resources	TGC	communication	strategies, procedures to obtain services
Communication with community resources	TGC	legal system	coordination among providers, probation, employment, other legal situation
Communication with community resources	CM	education	educational attainment resources; facilitate access to services, serve as liaison
Communication with community resources	S	education	education status
Communication with community resources	TGC	education	education options
Social contact	CM	support group	community based support; facilitate access to services, serve as liaison
Social contact	S	interaction	evidence of interaction with others (e.g. visitors, phone calls, social clubs, activities)
Social contact	S	signs/symptoms - mental/emotional	affect/behavior
Social contact	TGC	support system	importance of support system, identifying
Mental health	CM	medical/dental care	coordination among providers; facilitate access to services, serve as liaison
Mental health	CM	social work/counseling care	schedule services, coordination among providers, referral, community based support; facilitate access to services, serve as liaison
Mental health	S	coping skills	adaption to challenges and changes; choices
Mental health	S	screening procedures	depression screening
Mental health	S	signs/symptoms - mental/emotional	affect/behavior; thoughts, emotions, behaviors, stress
Mental health	TGC	coping skills	crisis intervention, relaxation techniques; adaptation techniques
Mental health	TGC	signs/symptoms - mental/emotional	emotional wellbeing/mental health, impact on other areas of life



Psychosocial & Physiological Domains

Caretaking/parenting	CM	support group	community based support; facilitate access to services, serve as liaison
Caretaking/parenting	S	caretaking/parenting skills	provision of appropriate care
Caretaking/parenting	S	coping skills	adaption to challenges and changes; choices
Caretaking/parenting	S	safety	appropriate supervision, presence of safety hazards
Caretaking/parenting	TGC	caretaking/parenting skills	care for child/adult
Caretaking/parenting	TGC	coping skills	adaption to challenges and changes; choices
Caretaking/parenting	TGC	safety	appropriate supervision, presence of safety hazards
Abuse	CM	legal system	order for protection; child/adult protective services; facilitate access to services, serve as liaison
		social work/counseling care	schedule services, coordination among providers, referral, community based support; facilitate access to services, serve as liaison
Abuse	S	safety	abuse assessment screening, safety plan
Abuse	S	signs/symptoms - mental/emotional	affect/behavior, thoughts, emotions, behaviors that may be related to abuse
Abuse	S	signs/symptoms - physical	unexplained injuries, any physical evidence that may be related to abuse
Abuse	S	support system	sources of support related to abusive situation
Abuse	TGC	safety	discuss, review, update formal or informal safety plan
Abuse	TGC	signs/symptoms - mental/emotional	effects of domestic violence
Abuse	TGC	support system	importance of support system, identifying sources of support related to abusive situation
Abuse	S	finances	financial abuse
Cognition	CM	medical/dental care	coordination among providers; facilitate access to services, serve as liaison
		other community resources	formal supports; facilitate access to services, serve as liaison
Cognition	S	safety	presence of safety hazards, safety plan
Cognition	S	signs/symptoms - mental/emotional	evidence of condition
Cognition	TGC	coping skills	adaption to challenges and changes; choices
Cognition	TGC	safety	discuss, review, update formal or informal safety plan



Health-related Behaviors Domain

Nutrition	CM	other community resources	coordination among providers; facilitate access to resources and services, WIC, serve as liaison
Nutrition	S	dietary management	food insecurity, healthy eating for age/condition, BMI
Nutrition	TGC	dietary management	food insecurity, healthy eating for age/condition, BMI
Physical activity	CM	other community resources	formal or informal physical activity opportunities; facilitate access to services, serve as liaison
Physical activity	S	wellness	routine physical activity/exercise
Physical activity	TGC	behavior modification	integrate into daily routine
Physical activity	TGC	wellness	importance/benefits of physical activity
Personal care	CM	supplies	acquire needed supplies/equipment; facilitate access to services, serve as liaison
Personal care	CM	paraprofessional/aide care	refer to paraprofessional; facilitate access to services, serve as liaison
Personal care	S	personal hygiene	evidence of ability to manage own personal care and activities of daily living
Personal care	TGC	coping skills	adaption to challenges and changes; choices
Personal care	TGC	personal hygiene	personal care routines, activities of daily living
Substance use	CM	medical/dental care	schedule services, coordination among providers, referral; facilitate access to services, serve as liaison
Substance use	CM	support group	community based support; facilitate access to services, serve as liaison
Substance use	S	substance use cessation	use patterns/physical withdrawal cravings
Substance use	TGC	anatomy/physiology	effects of use on self and others
Substance use	TGC	substance use cessation	motivate change, decrease/stop use and exposure to substances
Health care supervision	CM	medical/dental care	coordination among providers; facilitate access to services, serve as liaison
Health care supervision	CM	other community resources	formal supports; facilitate access to services, serve as liaison
Health care supervision	S	medical/dental care	follows plan of care
Health care supervision	TGC	sickness/injury care	need for care and follow-up
Health care supervision	TGC	wellness	importance of routine preventive evaluations, immunizations
Medication regimen	CM	medication coordination/ordering	coordination among providers; facilitate access to services, serve as liaison
Medication regimen	S	medication action/side effects	possible medication issues
Medication regimen	S	medication administration	correct dose, technique, and schedule
Medication regimen	TGC	medication action/side effects	purpose and benefit, when to notify provider
Medication regimen	TGC	medication administration	correct dose, technique, and schedule
Medication regimen	TP	medication administration	client self-medicated during visit (e.g. Direct Observed Therapy)



File Home Insert Page Layout Formulas Data Review View Acrobat

Cut Copy Paste Format Painter Clipboard

Arial 10 A⁺ A⁻ B I U Merge & Center

Wrap Text

General \$ % .00 .00 Conditional Formatting as Table Normal 2 Neutral

Font Alignment Number

	A	B	C	D	E	F	G	H	
1	1	SNOMED CT	PBNUM	SNOMED CT	CGNUM	TGNUM	Problem	Category	Target
2	2	365552003	PB0001	410337009	CG0003	TG0022	Income	Case management	finances
3	3	365552003	PB0001	410387002	CG0004	TG0022	Income	Surveillance	finances
4	4	365552003	PB0001	410292002	CG0001	TG0022	Income	Teaching, guidance, and counseling	finances
5	5	365552003	PB0001	410345004	CG0003	TG0031	Income	Case management	medical/c
6	6	365552003	PB0001	410396002	CG0004	TG0031	Income	Surveillance	medical/c
7	7	365552003	PB0001	410263001	CG0001	TG0031	Income	Teaching, guidance, and counseling	medical/c
8	9	129683001	PB0002	410383003	CG0004	TG0018	Sanitation	Surveillance	environme
9	10	129683001	PB0002	410288009	CG0001	TG0018	Sanitation	Teaching, guidance, and counseling	environme
10	11	129683001	PB0002	410334002	CG0003	TG0018	Sanitation	Case management	environme
11	13	365508006	PB0003	410341008	CG0003	TG0027	Residence	Case management	home
12	14	365508006	PB0003	410392000	CG0004	TG0027	Residence	Surveillance	home
13	15	365508006	PB0003	386458004	CG0004	TG0046	Residence	Surveillance	safety
14	16	365508006	PB0003	410297008	CG0001	TG0027	Residence	Teaching, guidance, and counseling	home
15	17	365508006	PB0003	409059003	CG0001	TG0046	Residence	Teaching, guidance, and counseling	safety
16	19	129685008	PB0004	385761006	CG0003	TG0040	Neighborhood/workplace safety	Case management	other con
17	20	129685008	PB0004	386458004	CG0004	TG0046	Neighborhood/workplace safety	Surveillance	safety
18	21	129685008	PB0004	409059003	CG0001	TG0046	Neighborhood/workplace safety	Teaching, guidance, and counseling	safety
19	23	129686009	PB0006	423779001	CG0003	TG0066	Communication with community resources	Case management	continuity
20	24	129686009	PB0006	410363004	CG0003	TG0030	Communication with community resources	Case management	legal syst
21	25	129686009	PB0006	410376005	CG0004	TG0010	Communication with community resources	Surveillance	communi
22	26	129686009	PB0006	410423004	CG0004	TG0061	Communication with community resources	Surveillance	transporta
23	27	129686009	PB0006	410281003	CG0001	TG0010	Communication with community resources	Teaching, guidance, and counseling	communi
24	28	129686009	PB0006	410300003	CG0001	TG0030	Communication with community resources	Teaching, guidance, and counseling	legal syst
25	29	129686009	PB0006	410337009	CG0003	TG0016	Communication with community resources	Case management	education
26	30	129686009	PB0006	410381001	CG0004	TG0016	Communication with community resources	Surveillance	education
27	31	129686009	PB0006	409065003	CG0001	TG0016	Communication with community resources	Teaching, guidance, and counseling	education
28	33	129874008	PB0007	410363004	CG0003	TG0059	Social contact	Case management	support g
29	34	129874008	PB0007	410393005	CG0004	TG0028	Social contact	Surveillance	interactio
30	35	129874008	PB0007	410412003	CG0004	TG0049	Social contact	Surveillance	signs/syn
31	36	129874008	PB0007	410319008	CG0001	TG0060	Social contact	Teaching, guidance, and counseling	support s
32	38	36456004	PB0012	410345004	CG0003	TG0031	Mental health	Case management	medical/c

Name of the guideline: Community Health Worker Guideline**Description:**

Community Health Workers (CHWs) are members of the community they serve. They build relationships and trust at the grassroots level and bridge the gap between individuals, families and communities and the health and human services systems. CHWs work in clinical and community settings to provide these linkages. CHWs teach community members and providers the knowledge and skills needed to understand, give, and receive appropriate care and service options. Thus, CHWs are essential team members who promote the health of populations at risk of poor health outcomes.

The Omaha System can be used to describe and document CHW practice that is holistic, client/family centered, and organic. This guideline was developed to enable CHWs to document observations and interventions, and to demonstrate outcomes of CHW services. The specialized training, supervision, and type of services CHWs receive and deliver, drive the translation of the CHW scope of practice. Therefore, these guidelines are intended to be incorporated within facilities specific CHW training program as a baseline document that can aid in defining and clarifying an individual CHW's scope of practice as well as aid in the documentation of CHW's observations and services.

Omaha System Problems:

- Income
- Sanitation
- Residence
- Neighborhood/workplace safety
- Communication with community resources



Data!

- What problems did CHWs identify in the community/population?
- What problems did CHWs address, in what ways?
- What were baseline, final, and changes in KBS? (did we make a difference?)
- What does CHW practice look like in the team context?



Conclusions

- The Omaha System can be used to describe and document CHW practice that is holistic, client/family centered, and organic.
- This guideline was developed to enable CHWs to document observations and interventions, and to demonstrate outcomes of CHW services.
- The specialized training, supervision, and type of services CHWs receive and deliver, drive the translation of the CHW scope of practice.
- Therefore, these guidelines are intended to be incorporated within facilities specific CHW training program as a baseline document that can aid in defining and clarifying an individual CHW's scope of practice as well as aid in the documentation of CHW's observations and services.



New Horizons in Community Health

- The CHW care plan can be freely adopted
- The Alliance can compare data and aggregate to show importance and value of CHW practice
- The Alliance can create evidence-based care plans/guidelines for specific interventions described today, to aid in dissemination and documentation



References

- American Public Health Association (n.d.). Community Health Workers. Available at: <https://www.apha.org/apha-communities/member-sections/community-health-workers>
- Minnesota Department of Human Services and the Hennepin County Ryan White Program HIV/AIDS Medical Case Management Standards (Appendix C, HIV/AIDS ACUITY ASSESSMENT, pages 24-26)
- Textbooks and articles from CHW training programs (available at OmahaSystemGuidelines.org)

