

HEALTH

Navigate with a project management approach

Text by **DIANNE SAVASTANO**

When managing a health care crisis for yourself or a loved one, you may well be facing the challenge of your life. Navigating the complexities can be overwhelming, even to those who understand how the system works.

Take the example of Anne, whose 71-year-old father was diagnosed with two types of cancer within the space of a month.

His case required the services of 18 different entities, from his primary care physician to his surgeon, oncologists and other specialists to testing facilities, chemotherapy providers, home care agencies, his employer and insurance company.

Not one of these was responsible for overseeing the big picture, except for Anne.

Even with her nursing background, Anne had a hard time keeping track of all the people participating in her dad's care. The potential for something to fall through the cracks was huge.

With the right information, however, Anne avoided this danger. For example, she could make the most of medical appointments and learned how to organize her dad's medical information - from referrals to test results - so that he could be assured of receiving thorough and timely care.

You or your employees may find yourselves in Anne's position. According to a recent study by the National Alliance for Caregiving and AARP, one in four women manages



the health care of an older parent or relative.

Many caregivers work full time and must also juggle careers, family and their own needs while caring for loved ones. If you, like many people, are in the position of managing your own health care, you need even more help with these important details.

Luckily, sound strategies for taking control are within reach. Why not handle health care issues the same way you handle your work projects? As today's health care becomes more consumer-driven, people are forced to become responsible for "project managing" their own health or that of a loved one.

Here are a few techniques to help

you take on this challenge with confidence.

Define the team

With any project, you start with the teams and their roles. The medical team is one half of the picture. The caretaking team of family, friends and neighbors is just as crucial.

First, list the members of the medical team - such as the primary care physician, specialist physicians, hospitals, home health agencies, insurance - and their contact numbers. Note who is accountable for what aspect of the patient's health.

Now do the same with the team of caretakers, the people who offer rides to appointments, run errands and check on the patient.

The larger the team, the more you can share the burden, but sometimes this adds to the confusion.

Reduce the likelihood of miscommunication by naming a single person as the project manager, responsible for overseeing the whole and serving as the main point of contact for both teams.

Get organized

After waiting weeks for an appointment, you may only have a short time with your doctor. How can you ensure that all your questions get answered?

First, create a calendar of upcoming medical appointments that you can share with your primary care physician and the caretaking team. This is

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HEALTH

also a great way to coordinate caretaking activities.

Treat each medical appointment as you would a business meeting. The physician will appreciate your efficiency and preparation.

Before the appointment, set a brief agenda. Formulate and prioritize your questions on paper. Make sure you have all necessary paperwork with you – such as referral forms, copies of diagnostic tests and medication lists.

People often have to reschedule appointments with specialists because they are missing an important piece of paper.

Also, make sure you have a written account of the proceedings. If you don't want to interrupt the conversation to take notes, consider bringing someone with you to document the discussion.

Afterwards, it's fine to request a copy of the physician's dictated notes so you can be sure that you and your doctor are on the same page.

Use the right tools

Doctors need data. But even in this era of online medical information, you can't assume that your physicians have all the facts they need pertaining to your case.

In business, you use charts and

spreadsheets to track project milestones. Why not do the same with health care data? Set up a spreadsheet to organize historical and current medical information.

For example, create one to list medications, another to track recent blood pressure readings and a third for diagnostic tests and results.

Another great idea is to start a binder for yourself or your loved one where you can store all this health-related information. Take this binder with you to each appointment, so you always have your complete medical record within easy reach.

Set objectives and target dates

One of the most anxiety-provoking aspects of an illness is unpredictability. Patients experience setbacks, providers cancel appointments and insurance companies deny claims. If you are able to set clear objectives, as you do with a business project, however, you won't lose focus when the unexpected happens.

One way to avoid setbacks is to rely on your calendar. When your doctor orders a diagnostic test, such as a urine culture, find out how long it takes to receive results. Then mark that target date in your health care calendar.

If for some reason your physician

does not call you within the timeframe, you can follow up. Here, again, ask for a written test report that you can include in your health care binder.

Communicate regularly with the team

Many people assume that their primary care physicians and specialists regularly communicate regarding changes in their condition and treatment. Unfortunately, even the most conscientious doctors have trouble keeping up with news regarding each and every patient.

As a health care project manager, you can stay in control by communicating with providers and insurers each time the health care picture changes. For instance, in Anne's case, when her father was diagnosed with the second cancer, she alerted all his doctors so they could confer and prioritize treatment.

By following these simple, yet powerful, steps, you'll be able to navigate our complex health care system and be assured of a better medical outcome.

Dianne Savastano, MBA, BS, nursing, founded Healthassist to help individuals and families navigate the complexities of health care.