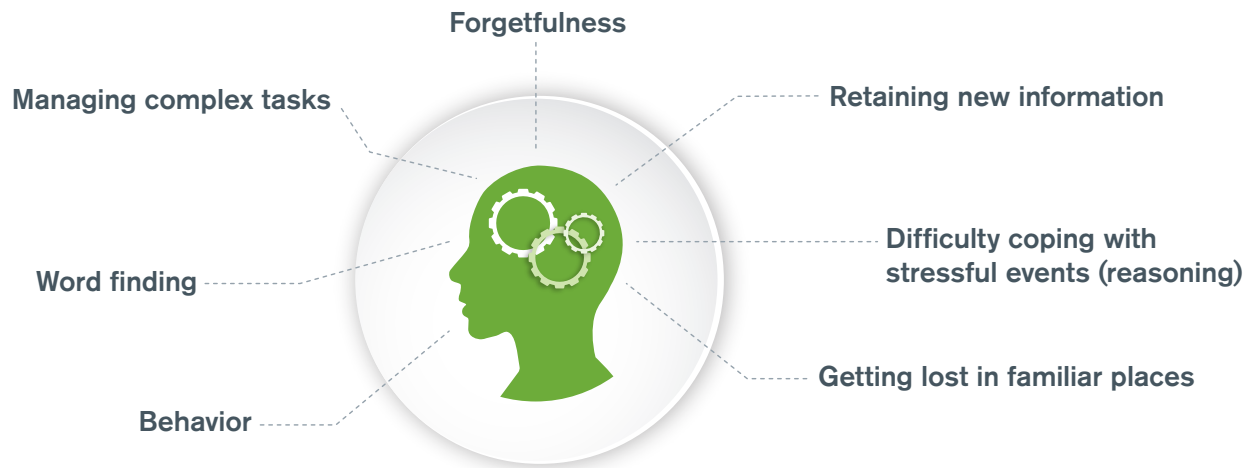




Brain Health  
**Initiative**  
PLAYBOOK





## What?

### What is the Brain Health Initiative?

The Brain Health Initiative is designed to address the different levels of need based on how a person has scored on a cognitive screening. Clinic staff will perform dementia or cognitive screening for each patient during an annual wellness screening.

New pathways in response to the annual cognitive screening process:

- No cognitive impairment
- Mild cognitive impairment
- Dementia or cognitive impairment

Based on scores of dementia or cognitive screening tool, clinic staff will refer patient and family caregivers to appropriate resource.

## Why?

**The goal of the Brain Health Initiative is to increase dementia-capable practices in primary care. This initiative will:**

- Remove the burden on clinicians and staff to address the non-medical needs of patients with cognitive impairment, dementia, and accompanying behavior problems
- Create consistent, scalable responses to our patients' annual dementia or cognitive screening process
- Address the interest that patients with normal cognitive functioning have in maintaining their brain health
- Support the needs of our patients who experience memory loss and cognitive decline, and reduce the burden on family caregivers

WellMed is moving toward a One Team model of care, and this initiative demonstrates a holistic approach to brain health and physical health by leveraging existing caregiver and senior center resources.

## For Clinical Staff:

### TOOLS:

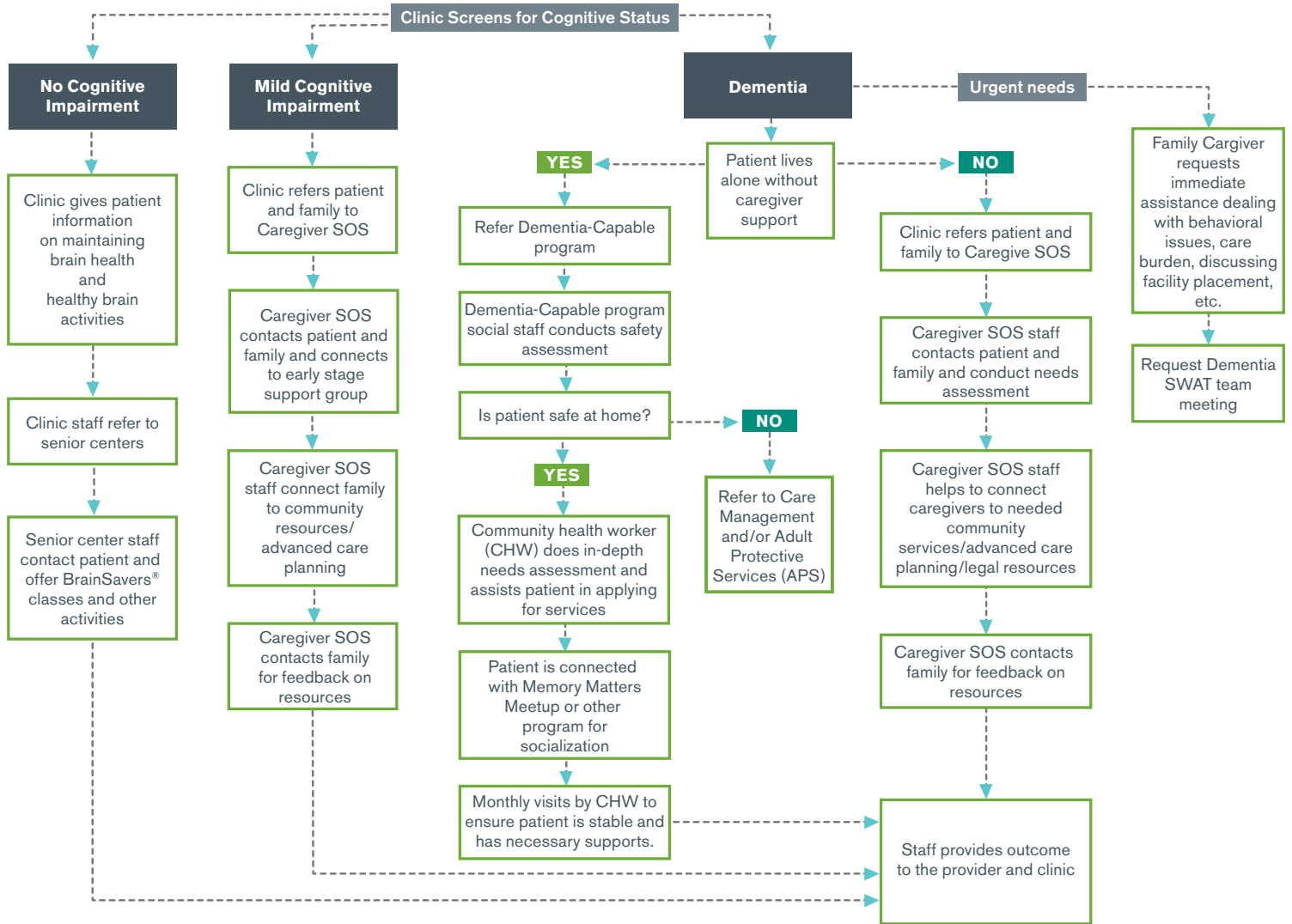
1. **Cognitive screening and referral flowchart (A)**
2. **Frequently Asked Questions: Dementia screening and referral process(B)**
3. **Dementia-capable SWAT team process flowchart (C)**
4. **Frequently Asked Questions: Dementia-capable SWAT team process (D)**
5. **Patient brochures**
  - a. Maintaining Brain Health
  - b. Caregiver SOS
6. **Provider checklist:**
  - Patient NOT at risk for dementia:
    - Educate on brain health
    - Refer to WellMed Charitable Foundation (WCF) senior centers for in-person or virtual activities including BrainSavers™
    - Reassess yearly
  - Patient with mild cognitive impairment:
    - Refer to Caregiver SOS program
    - Caregiver specialists will contact the patient/family caregiver and determine needs, including for advance directives
    - If patient living in San Antonio is alone with no or minimal caregiver support, the Dementia-Capable team will perform safety assessment and engage patient in needs assessment process
  - Patient with dementia:
    - Refer to Caregiver SOS program
    - Utilize SWAT team process if behavioral or other issues are creating an immediate need for intervention

## For clinic administrators:

### Information on how to obtain tools for clinical staff:

1. **Patient/family caregiver education materials**  
**1-866-390-6491 • [caregiversos@wellmed.net](mailto:caregiversos@wellmed.net)**
2. **Caregiver SOS referral link • <https://wellmed.quickbase.com/db/bqmeundw8>**
3. **Senior center referral link • <https://wellmed.quickbase.com/db/bqu5dsgf8>**

(A) Cognitive screening and referral flowchart



## (B) Frequently Asked Questions – Dementia screening and referral process

### What is a dementia-capable practice?

The concept of a “dementia-capable” system involves accommodating the needs of a population that experiences memory loss, a variety of physical, cognitive, and behavior symptoms, and other co-morbidities. Health systems may support the development of such systems on state and local levels through health research and translation, support services and programs, workforce training, and the creation of dementia-friendly communities.

### What are the types of referrals for the Brain Health Initiative?

#### If a person shows no cognitive impairment:

- Clinic gives patient results and provides information on healthy brain activities.
- Clinic enters patient referral to senior center.  
<https://wellmed.quickbase.com/db/bqu5dsgf8>
  - Senior center staff provides patient with virtual WCF healthy brain activities and/or local senior centers activities
    - BrainSavers® classes
    - Fitness classes
    - Health and nutrition classes

#### If a person shows mild cognitive impairment:

- Clinic enters patient referral in WellMed Caregiver SOS.  
<https://wellmed.quickbase.com/db/bqmeundw8>
- Caregiver SOS contacts caregiver and conducts a needs assessment to determine level of need and available resources:
  - Early-stage support group
  - Caregiver Teleconnection program
  - Advance planning
  - Alzheimer’s Association and other community resources

#### If a person shows a diagnosis or symptoms of dementia:

- Clinic enters patient referral in WellMed quickbase site.  
<https://wellmed.quickbase.com/db/bqmeundw8>
- Caregiver SOS contacts caregiver and conducts a needs assessment to determine level of need and available resources:
  - Care consultation with caregiver specialist
  - Caregiver Teleconnection program
  - Advance planning
  - Alzheimer’s Association and other community resources

Patient is demonstrating behavior problems or care has become unmanageable, or caregiver is showing extreme or high levels of stress, and/or expressing a need for placement of the care recipient into a long term care facility:

- Clinic staff will refer patient and caregiver to SWAT team. Clinic staff will schedule a meeting with the provider, social worker/health coordinator and caregiver specialist to discuss patient and caregiver needs.
- If it is determined that a patient lives alone, caregiver specialist will include the Dementia-Capable program (San Antonio only) social worker in the meeting.
- Following the meeting, the caregiver specialist will contact the family caregiver within 24 hours to implement recommended services.

If a person with dementia lives alone:

- Clinic makes referral to Dementia-Capable program (San Antonio only) to Caregiver SOS <https://wellmed.quickbase.com/db/bqmeundw8>
- Social worker with Dementia-Capable program contacts person living alone with dementia to conduct initial assessment for home safety

**How is a referral made?**

Referrals to Caregiver SOS

For those patients who screen positive for mild cognitive impairment or dementia, the referral to the Caregiver SOS program can be made through Quickbase Caregiver SOS at <https://wellmed.quickbase.com/db/bqmeundw8>

Referrals to Dementia-Capable program (San Antonio only)

For those patients who screen positive for dementia and have a caregiver who is experiencing extreme or high levels of stress, clinic staff will initiate a referral to the Dementia-Capable program, Quickbase Caregiver SOS at <https://wellmed.quickbase.com/db/bqmeundw8>

### **What is Caregiver SOS?**

The Caregiver SOS program is operated by the WellMed Charitable Foundation, and provides evidenced-based services at no cost for family members and friends providing care to a loved one (60 years of age or older) with dementia or other chronic illness.

- Caregiver Coaching (evidence-based) – caregiver specialists provide one-on-one consultation to provide guidance on how to manage caregiving responsibilities and manage stress.
- Caregiver Teleconnection – Hour-long learning sessions done over the phone. Experts from around the country share information on topics pertinent to caregiving. Recordings of sessions are available.
- Stress-Busting Program™ (evidence-based) – nine-week program designed to teach stress self-management techniques and coping skills as it relates to caregiving.
- Bilingual services are available.

### **Why is it important to consider the caregiver?**

Caregivers are an important partner in the health care team for many older adults as they are often the “gatekeeper” for the prescribed treatment plan for their loved one. Caregivers ensure tasks are followed and that communication is provided in regards to changes and/or concerns in the care recipient's health status. Without the assistance and intervention from the family caregiver, many older adults who are not able to manage these tasks on their own would be at risk for hospitalization or placement in long-term care.

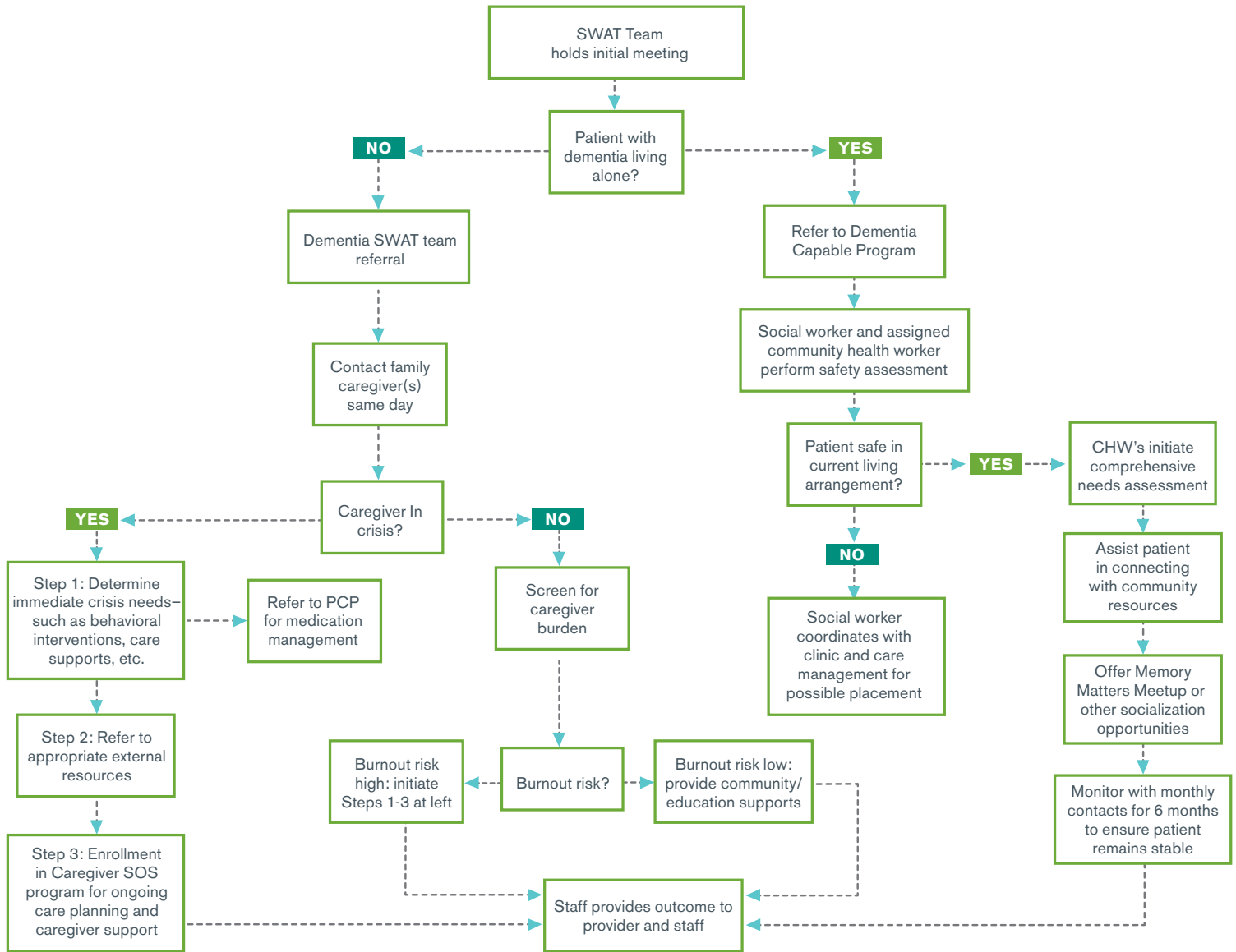
Research shows that caregivers do not feel prepared to take on some of these tasks, and are often overwhelmed with all they have to do in addition to the emotional strain of caring for someone. When a caregiver is struggling, there is an increased use of long term services and supports, an increase in ER or hospitalization admissions, an increased potential for abuse or neglect, and the increased risk of adverse health issues for the caregiver due to stress related illnesses. When a caregiver has the needed support and information and is confident in carrying out the required tasks, then the care recipient does better.

### **What is the Dementia-Capable program (San Antonio only)?**

WellMed patients who are identified as persons living alone with Alzheimer's disease and related dementias will be screened by a WCF social worker using a protocol informed by the Live Alone Dementia Safety Net Algorithm. If needed, the social worker will arrange for the supportive services to help the individual to live safely in the community for as long as possible. After the initial assessment, a community health worker monitors patients for six months.



(C) Dementia-Capable SWAT Team Process Flowchart



## (D) Frequently Asked Questions – Dementia-Capable SWAT team

### What are the types of referrals made to the Dementia SWAT team?

A referral is made directly to the Dementia SWAT Team if any of these apply:

- Patient is demonstrating behavior problems
- Caregiver feels that care has become unmanageable
- Caregiver is showing extreme or high levels of stress due to the necessary care
- Caregiver is expressing a need for placement of the care recipient into a long-term care facility

### Who makes up the Dementia SWAT team?

The provider, social worker/health coordinator and caregiver specialist

### What is the process the Dementia SWAT team will follow?

- When a referral has been made to the SWAT team, the clinic staff will schedule a meeting with the provider, social worker/health coordinator and caregiver specialist to discuss patient and caregiver needs.
- If it is determined that a patient lives alone, the caregiver specialist will include the Dementia-Capable program (San Antonio only), social worker in the meeting.
- Following the meeting, the caregiver specialist will contact the family caregiver within 24 hours to implement recommended services.