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MUCH MORE
THAN I.T.

OPPORTUN[IT]Y

Optimization and You

February 27, 2015

Today's Presenters

*Sue D'Agostino, RN

Sr. Clinical Consultant with Galen Healthcare Solutions

- ❖ Over 20 years in Healthcare including 9 years EHR experience
- ❖ Galen TW EHR Certified, Advanced Certified-V11 Note/Orders and Results/Charge/MU 2
- ❖ Clinical Consultant, Business/System Analyst

*Bryan Potter

Sr. Consultant with Galen Healthcare Solutions

- ❖ Over 7 years in HIT
- ❖ Galen TW EHR Certified,
- ❖ Business/System Analyst

Solving for Today. Preparing for Tomorrow.

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Your phone has been automatically muted. Please use the Q&A panel to ask questions during the presentation!

Agenda for Today

- **Definition of Optimization**

- **Why optimize?**

- **PCMH, MU, Healthcare Reform**

- **Areas involved in the Optimization Process**

- **Tool used to evaluate EHR Optimization**

Optimization-

an act, process, or methodology of making something as fully perfect, functional, or effective as possible

finding an alternative with the most cost effective or highest achievable performance by <u>maximizing</u> desired factors and <u>minimizing</u> undesired ones

Why go through the clinical Optimization Process?

- Physician/End User dissatisfaction

- Implementation issues/Inefficiencies

- Integration Issues

- Sub-optimal utilization

- Compliance Assurance

Benefits of Optimization

- Uncover solutions to the toughest challenges

- Create measurable ROI fast

- Less clicks for physicians/end users

- Service delivery excellence AKA

OPTIMAL PATIENT CARE

Meaningful use: <u>Improve quality, safety, efficiency, and reduce health disparities. Engage patients and family. Improve care coordination, and population and public health</u>

PCMH (Patient Centered Medical Home)

<u>A patient-centered medical home integrates patients as active participants in their own health and well-being. Patients are cared for by a physician who leads the medical team that coordinates all aspects of preventive, acute and chronic needs of patients using the best available evidence and appropriate technology with a high level of accessibility</u>

Medical Office Areas

1. Appointment Scheduling
2. Pre-appointment Prep
3. Day of Appointment/Pre-exam
4. Intake/Examination
5. Order Management (Lab/Rad Services)
6. Surgical Scheduling
7. Results Processing
8. Transcribed Document Processing
9. Medications Refills/Changes
10. Triage/Call Processing
11. Charge Processing
12. Medical Records Management
13. Miscellaneous Workflow Management

Workflow Processes (Non-clinical)

1. Appointment Scheduling
2. Pre-appointment Prep
3. Day of Appointment/Pre-exam

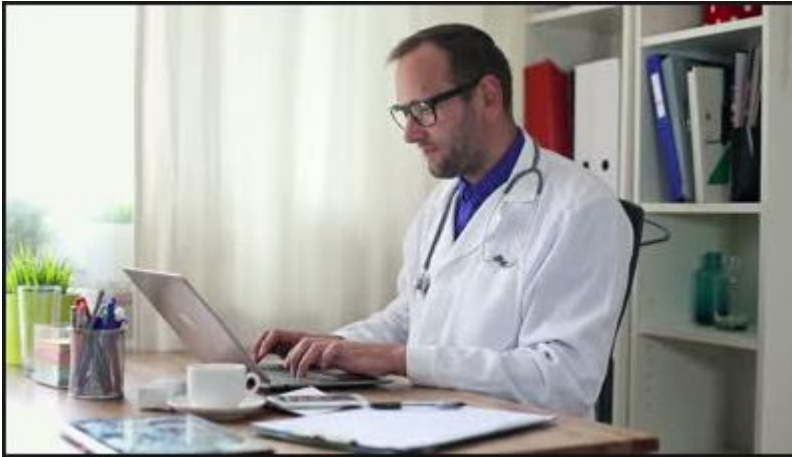"Try to fill out these forms before your appointment's over."

Workflow Processes (Clinical)

4. Intake/Examination
5. Order Management (Lab/Rad Services)

Workflow Processes (Clinical)

7. Results Processing

Workflow Processes (Clinical)

9. Medications Refills/Changes

Workflow Processes

10. Triage/Call Processing

Standardization!!!

Clinical & Administrative

Optimize Efficiency

More standardized processes, less room for errors

Improve Patient Safety

Use a single process

What's Included, What's Not

- **OUT**
  - How to run SQL queries
- **IN**
  - Why Use Analytics?
  - Reporting Metrics
  - Real-World Examples
  - Best Practice Recommendations

Why Use Analytics?

Optimization

- Helps identify gaps in workflow/build

- Creates measurable ROI

- Compile Evidence to Effect Change

Tasking Analytics & Optimization

1. **Start/End Date**
2. **Task Name**
3. **Active/Inactive Status**
4. **Delegated/Undelegated Status**

5. **Count Total**
6. **Count Active**
7. **Count Removed**
8. **Count Complete**
9. **Avg Hours to Completion**
10. **Task Owner**

	A	B	C	D	E	F	G	H
1	TaskName	Inactive	Delegated	Total	Active	Removed	Complete	AvgHour Complete
178	Schedule Appointment	N	Y	6761	595	4	6162	101
179	Schedule Results F/Up	N	Y	100	15	1	84	264
180	Sign Amended Note	N	N	2520	15	33	2472	28
181	Sign Note	N	N	5245	136	113	4996	53
182	Sign Form	N	N	0	0	0	0	0
183	Sign Letter	N	N	0	0	0	0	0

Metrics: Count Total

TaskName	IsInactive	IsDelegated	CountTotal
Submit Enc Form	N	N	63941
Sign-Note	N	N	60555
Miscellaneous	N	N	5843
Rx Xmit Fail	N	N	399
Dispense Sample	N	Y	157
Personal	N	N	28
CoSign Note	N	N	0
Verify CED Doc	N	N	0
Verify CED Item	N	N	0
Verify Portal Doc	N	N	0
Verify Portal Form	N	N	0

5. **Count Total**
6. **Count Active**
7. **Count Removed**
8. **Count Complete**
9. **Avg Hours to Completion**
10. **Task Owner**

Metrics: Count Active

TaskName	CountTotal	Count Active
Overdue Order	16306	4072
Submit Res Enc	2555	895
Review Enc Form	50554	767
Schedule Appointment	6761	595
Financial Auth	8074	461
Submit Enc Form	63941	447
Finish Note	58292	107
Med Renewal	4474	28
Mail Results to Patient	1325	1
Rx Renew Request	14884	0

5. **Count Total**
6. **Count Active**
7. **Count Removed**
8. **Count Complete**
9. **Avg Hours to Completion**
10. **Task Owner**

Metrics: Count Removed

TaskName	CountTotal	Count Removed
Order Notification	18963	1739
Finish Note	58292	573
Submit Res Enc	2555	481
Sign-Note	60555	424
Overdue Order	16306	301
Call Back	11873	70
Review Enc Form	50554	26
Rx Renew Request	14884	2
Verify Patient Results	18345	0
Go to Med	404	0

5. **Count Total**

6. **Count Active**

7. **Count Removed**

8. **Count Complete**

9. **Avg Hours to Completion**

10. **Task Owner**

Metrics: Count Completed

TaskName	CountTotal	Count Removed	Count Complete
Submit Enc Form	63941	144	63350
Sign-Note	60555	424	59898
Finish Note	58292	573	57612
Review Enc Form	50554	26	49761
Verify Patient Results	18345	0	18204
Order Notification	18963	1739	17082
Rx Renew Request	14884	2	14882
Submit Res Enc	2555	481	1179
Dispense Sample	157	4	68
OverDue Reminders	40	18	7

5. **Count Total**

6. **Count Active**

7. **Count Removed**

8. **Count Complete**

9. **Avg Hours to Completion**

10. **Task Owner**

Metrics: Average Hours to Completion

TaskName	Count Complete	AvgHour Complete
Overdue Order	11929	326
Call Patient with results	2325	174
Miscellaneous	5659	108
Schedule Appointment	6162	101
Financial Auth	7609	97
Order Notification	17082	71
Call Back	11643	45
Rx Renew Request	14882	22
Sign-Note	59898	13
Submit Enc Form	63350	4

5. **Count Total**

6. **Count Active**

7. **Count Removed**

8. **Count Complete**

9. **Avg Hours to Completion**

10. **Task Owner**

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Metrics: Task Owner

TaskName	Task OwnerID	Count Total	Count Active	Count Removed	Count Complete	AvgHour Complete
Rx Renew Request	3240	289	0	0	289	13
Rx Renew Request	8752	284	0	23	261	24
Rx Renew Request	5102	231	0	0	231	12
Rx Renew Request	2836	235	12	0	223	21
Rx Renew Request	9098	184	0	0	184	6
Rx Renew Request	8741	180	0	0	180	22

5. **Count Total**

6. **Count Active**

7. **Count Removed**

8. **Count Complete**

9. **Avg Hours to Completion**

10. **Task Owner**

Tasking Recommendations

- **Activate**

- **Inactivate**

- **Review Workflow**

- **Inactivate Task & "Migrate" to Worklist**

- **Delegate & Display in New Task View**

	A	B	C	D	E	F	G	H	I	J
	TaskName	Inactive	Delegated	Total	Active	Removed	Complete	AvgHour Complete	Recommendation	Details
	Sign Note	N	N	5245	136	113	4996	53	Delegate	Move to "Provider Sign Note" Task View
	Rx Renew Request	N	N	14884	0	2	14882	22	Delegate	Move to "RX Management" Task View
	Immunization Documentation	N	Y	76	15	16	45	597	Migrate to Worklist & Inactivate Task	MedAdmin Worklist
	Schedule Appointment	N	Y	6761	595	4	6162	101	Migrate to Worklist & Inactivate Task	Scheduling Worklist
	Call Back	N	N	11873	156	70	11643	45	Review Workflow	AvgHourComplete is too long

Is Note Optimization Important?

Absolutely!

- Improves patient care
- Creates a streamlined workflow for Providers
- Generates Provider buy-in
- Assists in ICD 10 Clinical Documentation Improvement

Real Life Examples

Tasking:

- Number of appointments

- Average time to completion for tasks

- Pre and Post Optimization comparison

Real Life Examples Cont.

	Oct-13	Nov-13	Oct-14	Nov-14
Appointment (Count)	1201	1160	1426	1132

- **2,361 patients in 2013**

- **2,558 patients in 2014**

- **Increase of 197 patients**

Real Life Examples

Snapshot of task completion times

Task	Oct-13	Nov-13	Oct-14	Nov-14
Verify Patient Results (Avg Hours To Completion)	37	47	30	40
Sign-Note (Avg Hours To Completion)	13	20	19	23
Review Doc (Avg Hours To Completion)	163	63	24	25
RX Renew Request (Avg Hours To Completion)	13	15	16	18
Call Patient with results (Avg Hours To Completion)	38	25	16	13
Mail Results to Patient (Avg Hours To Completion)	10	4	8	10
Verify Doc (Avg Hours To Completion)	N/A	N/A	7	9
Follow Up (Avg Hours To Completion)	182	150	43	41

Real Life Examples Cont.

- **ROI report showing time of tasks per patient Pre and Post Optimization**

OCT - NOV					
		Total time of tasks per patient (Min)			
				All months	Excluding Summer
Before Optimization (Oct 2013 - Sep 2014)				21.38	16.89
	After Optimization (Oct -Nov 2014)			8.02	8.02
			Improvement	62%	53%

Real Life Examples

- **ROI report showing time of tasks per patient Pre and Post Optimization**
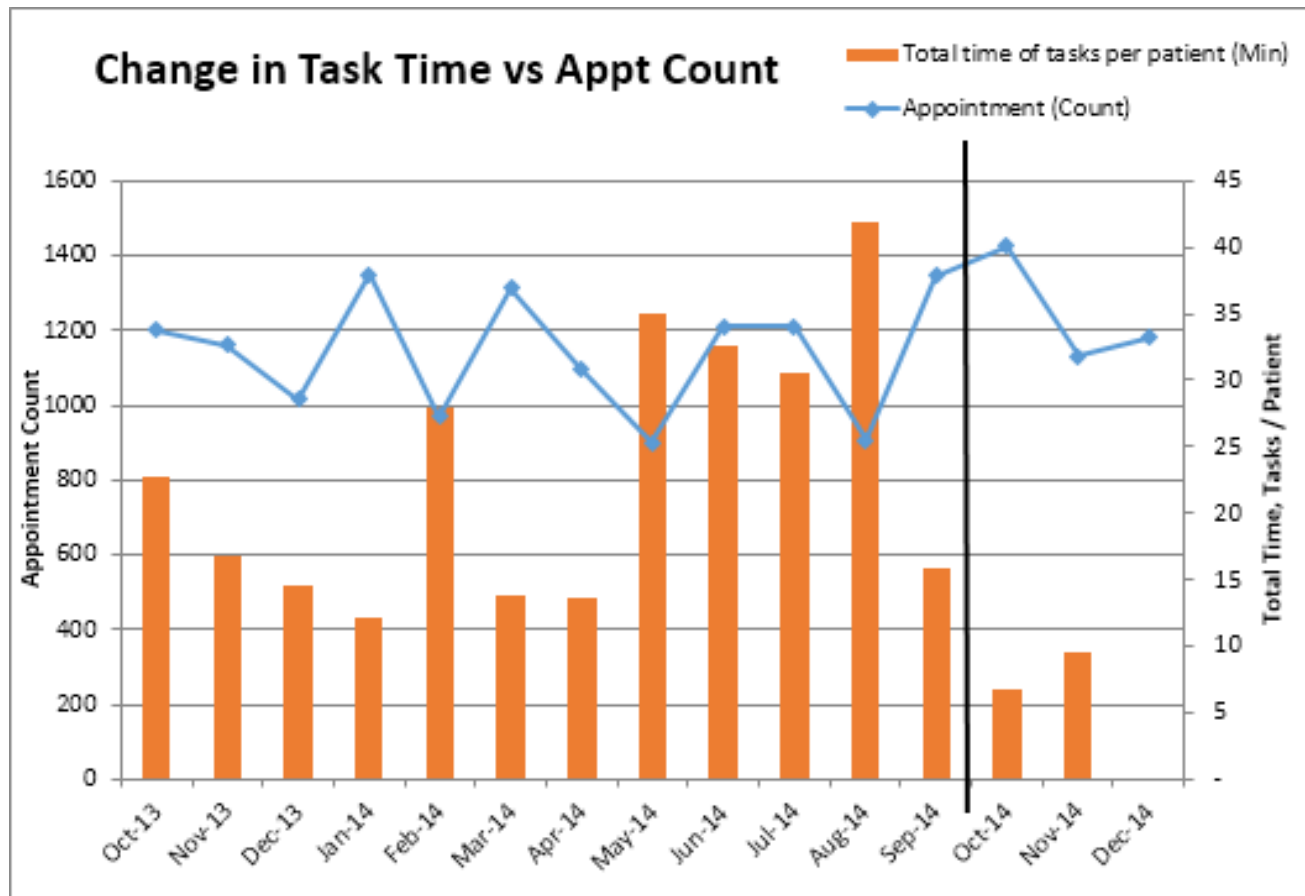
Real Life Examples

Note Optimization:

- Percentage of Notes completed by 6pm
- Percentage of Notes completed by 10pm
- Pre and Post Optimization comparison

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Real Life Examples Cont.

Snapshot of Notes completed by 6pm

Row Labels	Notes Finalized By 6PM	
	Nov-13	Nov-14
Provider 1	76%	93%
Provider 2	70%	96%
Provider 3	63%	90%
Provider 4	67%	94%
Grand Total	70%	88%

Real Life Examples Cont.

Snapshot of Notes completed by 10pm

Row Labels	Notes Finalized By 10PM	
	Nov-13	Nov-14
Provider 1	83%	93%
Provider 2	78%	98%
Provider 3	73%	90%
Provider 4	90%	99%
Grand Total	81%	91%

Real Life Examples

Next Challenge?

- Optimize an efficient Clinic

Real Life Examples Cont.

	Oct-13	Nov-13	Oct-14	Nov-14
Appointment (Count)	2116	1906	2215	1730

- **Appointment counts are similar**

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Real Life Examples

Snapshot of task completion times

| Task	Oct-13	Nov-13	Oct-14	Nov-14
Verify Patient Results (Avg Hours To Completion)	15	16	17	16
Sign-Note (Avg Hours To Completion)	9	11	14	16
Review Doc (Avg Hours To Completion)	17	29	23	29
RX Renew Request (Avg Hours To Completion)	12	18	23	22
Call Patient with results (Avg Hours To Completion)	21	32	23	25
Mail Results to Patient (Avg Hours To Completion)	0	3	6	5
Verify Doc (Avg Hours To Completion)	N/A	6	21	14
Follow Up (Avg Hours To Completion)	50	51	36	34

Real Life Examples Cont.

- **ROI report showing time of tasks per patient Pre and Post Optimization**

				Total time of tasks per patient (Min)	
				All months	Excluding Summer Months
Before Optimization (Oct 2013 - Sep 2014)				5.93	5.82
After Optimization (Oct -Nov 2014)				4.89	4.89
			Improvement	18%	16%

Real Life Examples

- **ROI report showing time of tasks per patient Pre and Post Optimization**
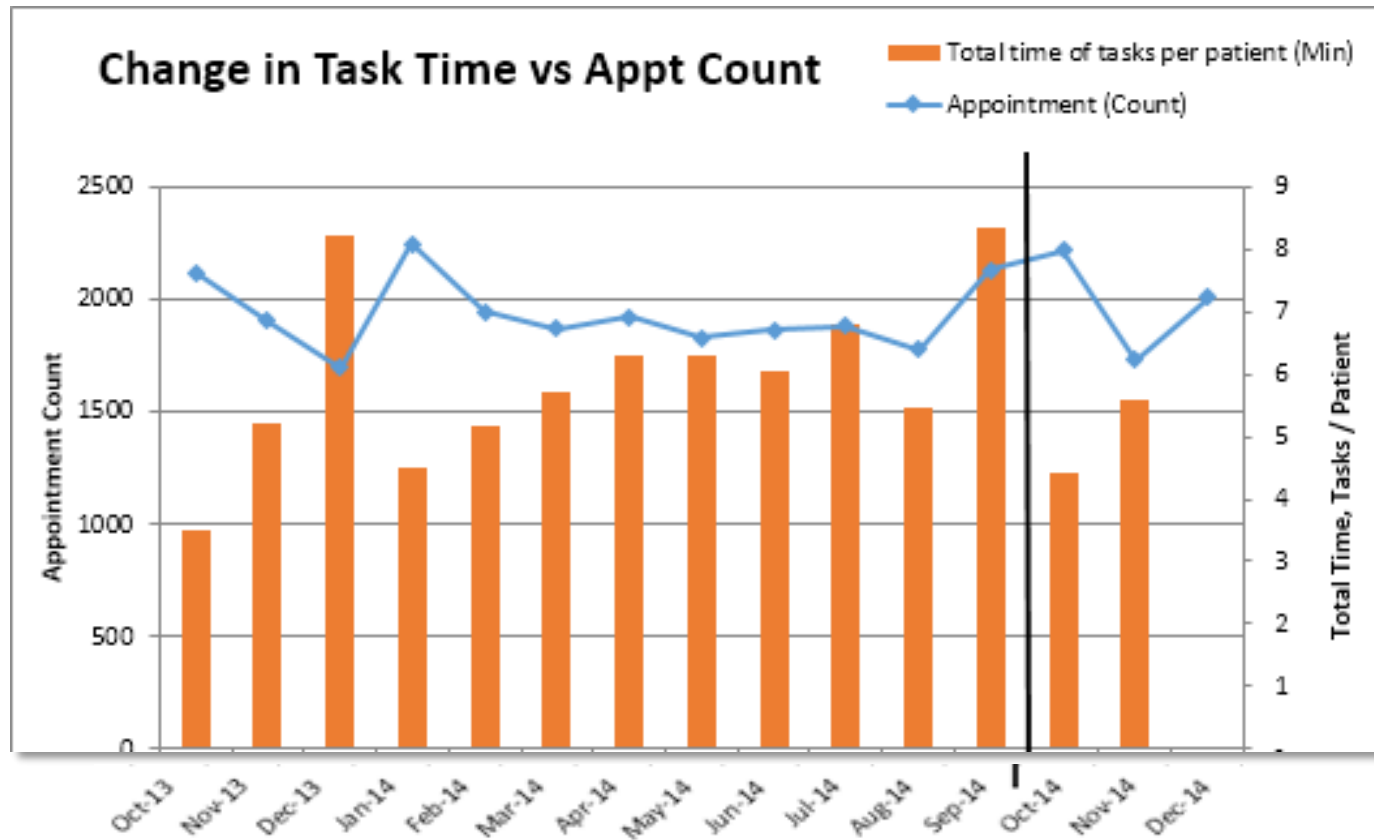
Best Practice Recommendations

- **Run queries against PROD databases off-hours**
- **Start simple with your queries, then grow the complexity of the reports**
- **Go through proper channels when implementing changes**
- **Monitor regularly post-implementation**
- **Leverage Enterprise Views as much as possible**
- **Maintain a comprehensive change document for tracking**

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Thank you for joining us today. For additional assistance contact us through our website at www.galenhealthcare.com

Questions?

- We will leave the Q & A open for a few moments for any additional questions.
- You can find all handouts as well as questions and answers from this webcast and other webcasts on our wiki at:

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