CLINICAL SAFETY & EFFECTIVENESS COHORT # 19

Reducing New OB Visit Cycle Time to Increase New OB Appointment Availability

The Team

- Division
  - *Elizabeth Castillo, Practice Manager OB-GYN*
  - *Kristina Keller, Practice Manager Otolaryngology*
  - *Amy Hernandez, Front Desk*
  - *Valerie Gonzalez, Scheduler*
  - *Monica Garza, Insurance Verification*
  - *Maricela Casarez-Lead MA*
  - *Abbie Aburizik-Facilitator*

- Sponsor Department:
  - *Rochelle David, M.D., Medical Director*
  - *Jeanette Jimenez Hernandez- Director of Practice Operations*

Team Picture

AIM Statement

The aim of this project is to decrease the cycle time for new OB visits by 15% by December 31, 2016.

The process begins when a patient arrives at the front desk and ends when a patient checks out at the front desk. This is important to improve because it not only affects physicians and our staff, it causes delays for our patients.
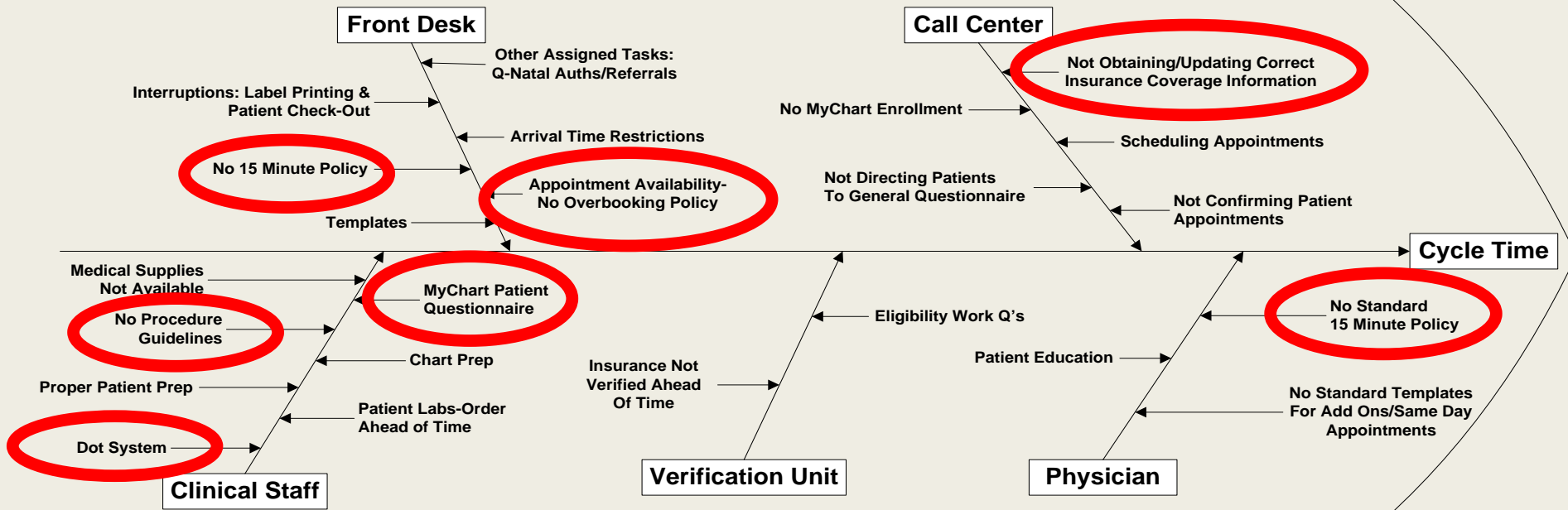
Project Milestones

- Team Created   September 2016

- AIM statement Created   September 2016

- Weekly Team Meetings   September 2016-December 2016

- Background Data, Brainstorm Sessions, Workflow and Fishbone Analyses   September- October 2016

- Interventions Implemented   October 2016- December 2016

- Data Analysis   November 2016 – December 2016

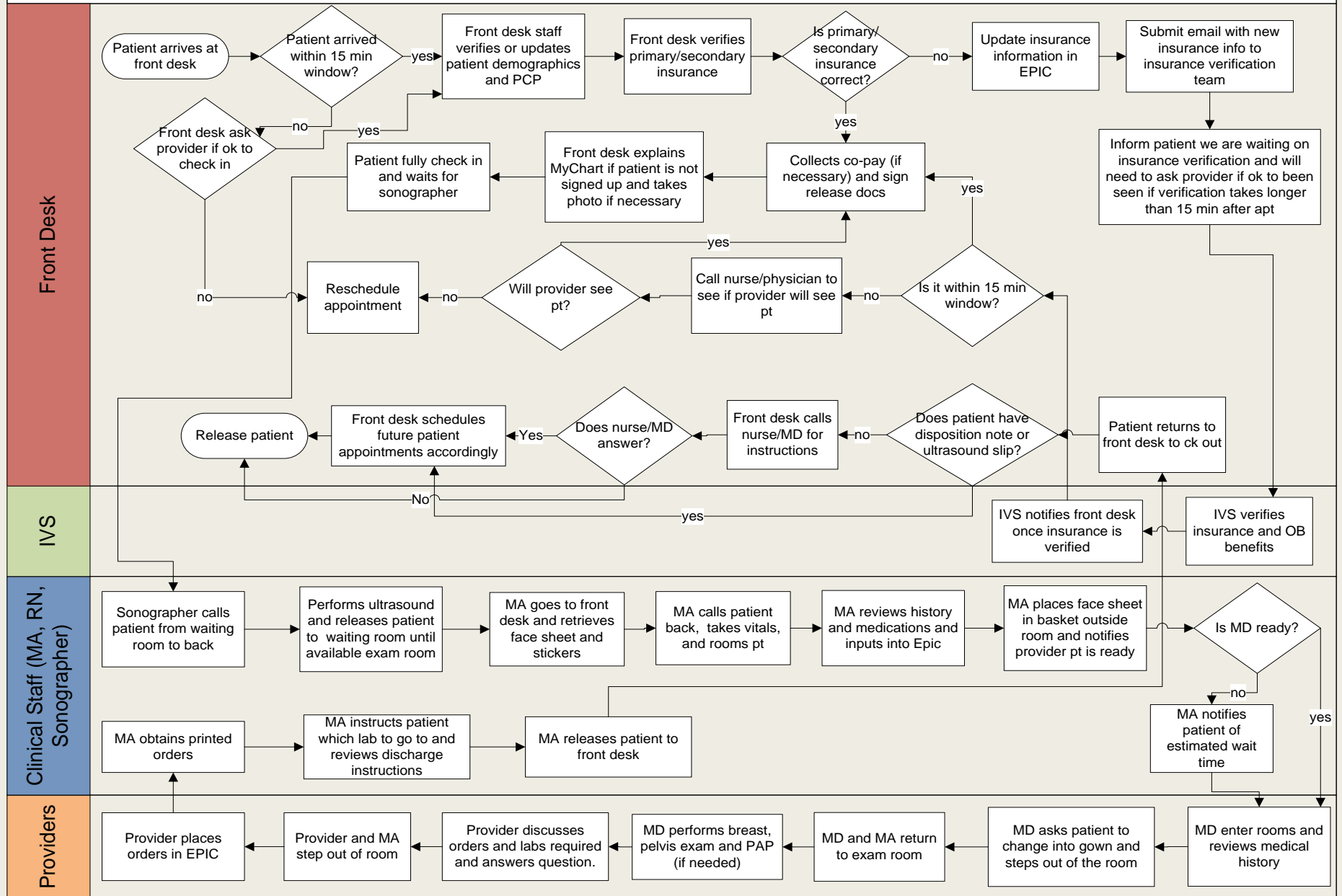- CS&E Presentation   January 13, 2017

Background

- Long appointment cycle times decrease patient satisfaction.

- New OB appointment availability is 2 months out.

- This problem is important to address because we need to provide better, more efficient access to medical services for our patients.

New OB Appointment Cycle Time Fishbone

Front Desk

Other Assigned Tasks: Q-Natal Auths/Referrals

Interruptions: Label Printing & Patient Check-Out

Arrival Time Restrictions

No 15 Minute Policy

Appointment Availability- No Overbooking Policy

Templates

Call Center

Not Obtaining/Updating Correct Insurance Coverage Information

No MyChart Enrollment

Scheduling Appointments

Not Directing Patients To General Questionnaire

Not Confirming Patient Appointments

Cycle Time

Medical Supplies Not Available

MyChart Patient Questionnaire

No Procedure Guidelines

Chart Prep

Proper Patient Prep

Patient Labs-Order Ahead of Time

Dot System

Eligibility Work Q's

Insurance Not Verified Ahead Of Time

Patient Education

No Standard 15 Minute Policy

No Standard Templates For Add Ons/Same Day Appointments

Clinical Staff

Verification Unit

Physician

Process Map for New OB Visits

Front Desk

Patient arrives at front desk → Patient arrived within 15 min window?

- **yes** → Front desk staff verifies or updates patient demographics and PCP → Front desk verifies primary/secondary insurance → Is primary/secondary insurance correct?
- **no** → Front desk ask provider if ok to check in
  - **yes** → (to Front desk staff verifies...)
  - **no** → Reschedule appointment

Is primary/secondary insurance correct?
- **no** → Update insurance information in EPIC → Submit email with new insurance info to insurance verification team → Inform patient we are waiting on insurance verification and will need to ask provider if ok to been seen if verification takes longer than 15 min after apt
- **yes** → Collects co-pay (if necessary) and sign release docs

Collects co-pay (if necessary) and sign release docs → Front desk explains MyChart if patient is not signed up and takes photo if necessary → Patient fully check in and waits for sonographer

Is it within 15 min window?
- **yes** → Collects co-pay (if necessary) and sign release docs
- **no** → Call nurse/physician to see if provider will see pt → Will provider see pt?
  - **yes** → Collects co-pay (if necessary) and sign release docs
  - **no** → Reschedule appointment

Patient returns to front desk to ck out → Does patient have disposition note or ultrasound slip?
- **no** → Front desk calls nurse/MD for instructions → Does nurse/MD answer?
  - **Yes** → Front desk schedules future patient appointments accordingly → Release patient
  - **No** → (IVS)
- **yes** → (IVS)

IVS

IVS notifies front desk once insurance is verified

IVS verifies insurance and OB benefits

Clinical Staff (MA, RN, Sonographer)

Sonographer calls patient from waiting room to back → Performs ultrasound and releases patient to waiting room until available exam room → MA goes to front desk and retrieves face sheet and stickers → MA calls patient back, takes vitals, and rooms pt → MA reviews history and medications and inputs into Epic → MA places face sheet in basket outside room and notifies provider pt is ready → Is MD ready?
- **no** → MA notifies patient of estimated wait time
- **yes** → MD enter rooms and reviews medical history

MA obtains printed orders → MA instructs patient which lab to go to and reviews discharge instructions → MA releases patient to front desk

Providers

Provider places orders in EPIC ← Provider and MA step out of room ← Provider discusses orders and labs required and answers question. ← MD performs breast, pelvis exam and PAP (if needed) ← MD and MA return to exam room ← MD asks patient to change into gown and steps out of the room ← MD enter rooms and reviews medical history
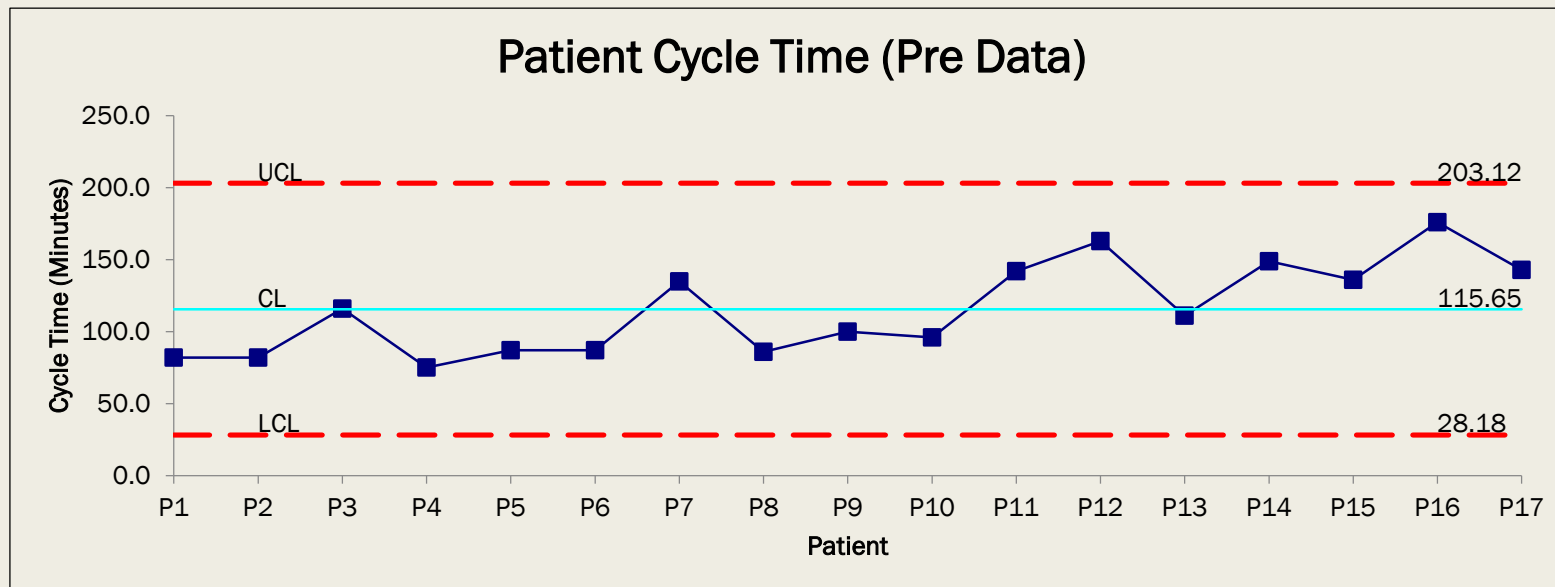
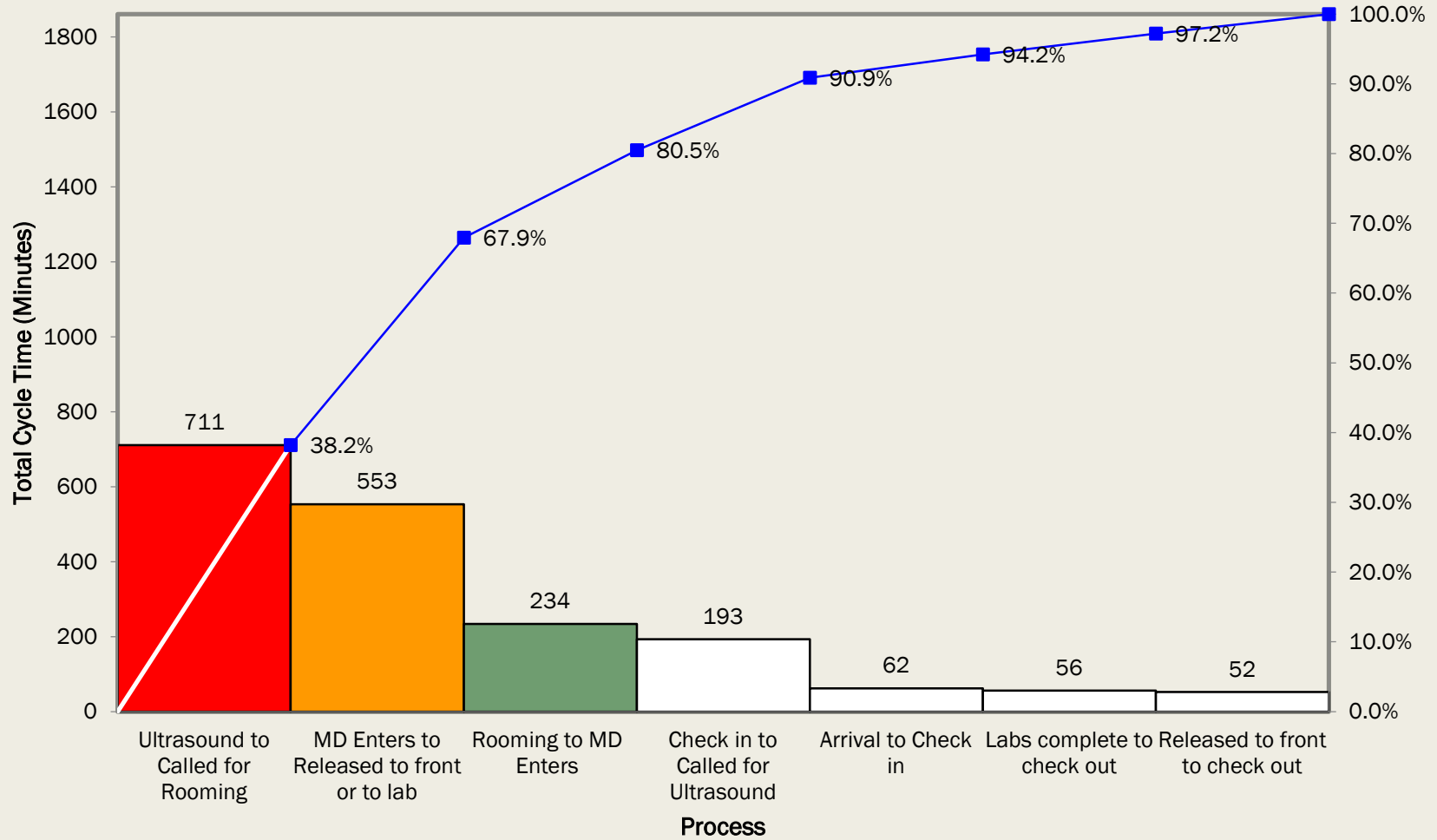# Pre-intervention Data: Fishbone and Process Map Analysis

- No 15 Minute Late Policy

- No Communication from Sonographer to Medial Assistant

- Medical History Taken When Patient Has Been Brought Back to Room

- Incomplete Exam Room Set-Up by Medical Assistant

- Medical Supplies Not Available in Exam Room

- Insurance Not Verified Ahead of Time

- Front Desk Has Several Interruptions

- Front Desk Has Other Assigned Tasks

- Call Center Not Collecting Correct Insurance Coverage Information

Pre-intervention Data: Appointment Data Capture

- Patient Scheduled for 30 Min Ultrasound Appointment and 30 Min Physician Consult

- Median Appointment Cycle Time: 111 min

- Average Appointment Cycle Time: 115 min

- Appointment Data Collection Methods Included:
  - *Epic Time Stamps*
  - *Observation*
  - *Staff Documentation of Times*

Patient Cycle Time (Pre Data)

UCL — 203.12

CL — 115.65

LCL — 28.18

Cycle Time (Minutes) — Patient (P1–P17)

Pareto Chart of Patient Cycle Time

DO: Implementing the Change

- 15 Minute Late Arrival Policy: 10/24/2016

- Epic Dot System to Notify MA's that Ultrasound is Complete: 10/24/2016

- Ensure Insurance Verification is Complete 3 Days in Advance: 10/24/2016

- Call Center to Register Patients on MyChart: 10/24/2016

- Assign Front Desk Authorization Requests to Benefit Coordinator: 11/1/2016

- Train Clinical Staff to Set-Up Exam Rooms The Same and Before Patient is Called Back: 10/26/2016

- Ensure Clinical Staff Has Medical Supplies Readily Available in Exam Rooms: 10/26/2016

- Send Medical History Questionnaire to Patients via MyChart- trialed with IVF patients; 2-3 min savings

CHECK: Results/Impact

- Reduced Median and Average Patient Cycle Time by 16.2%

- Average Appointment Cycle Time: 96.9 min

- Median Appointment Cycle Time: 93 min
  - ❏ *Ultrasound to Called for Rooming decreased 15.5 min*
  - ❏ *Rooming to MD Enters Room decreased 1.5 min*
  - ❏ *MD Enters Room to Released for Check-Out/Labs decreased by 1 min*

Patient Cycle Time (Post Data)

CHECK: Results/Impact

New OB Visit Cycle Time (Pre and Post Interventions)

mR New OB Visit Cycle Time (Pre and Post Interventions)
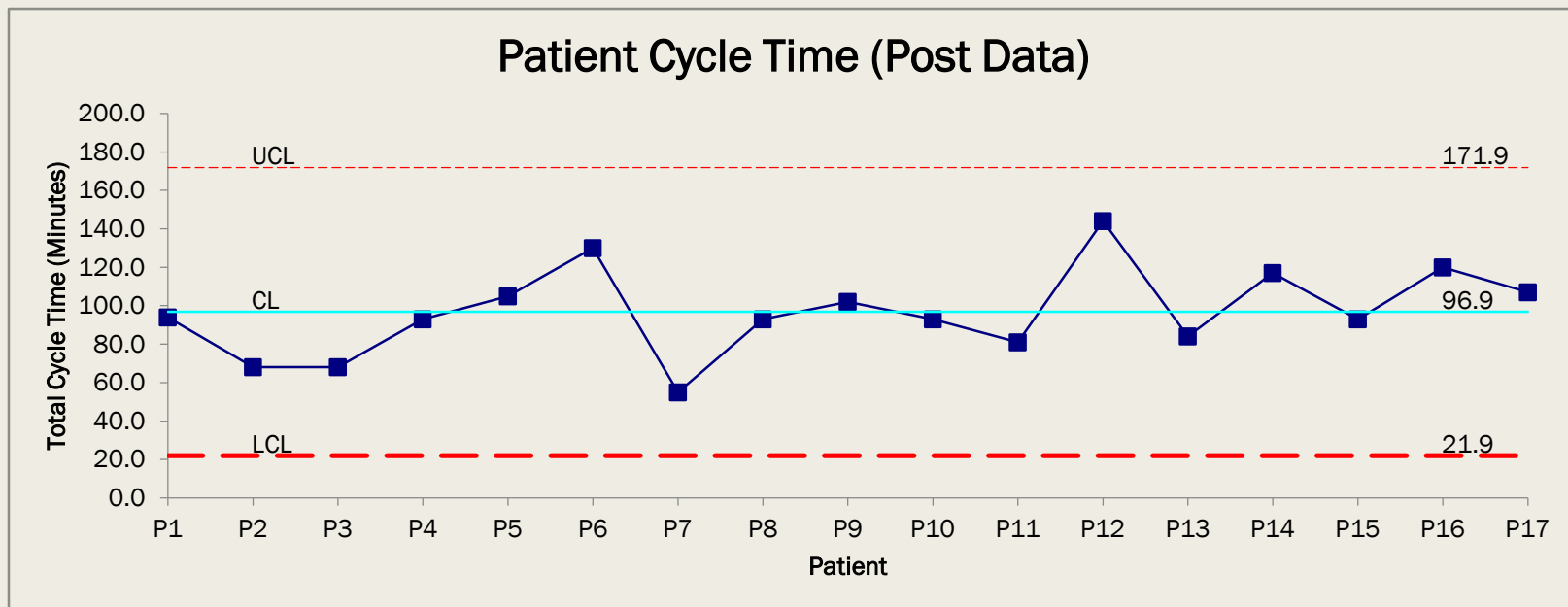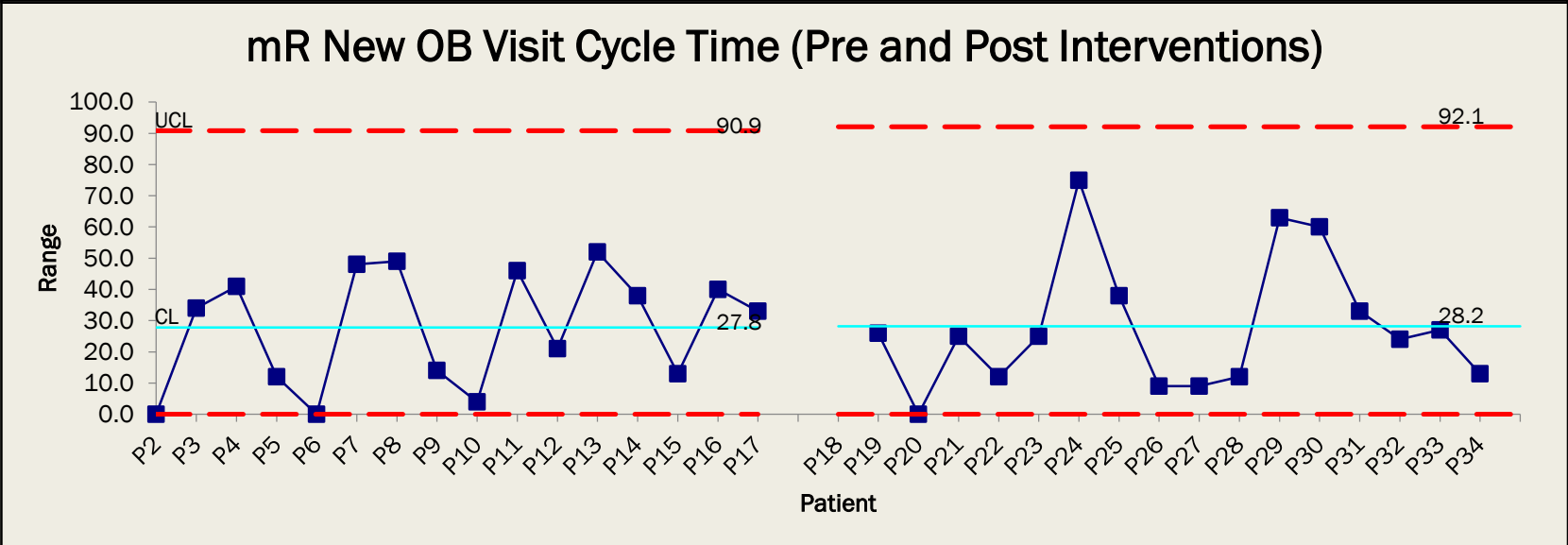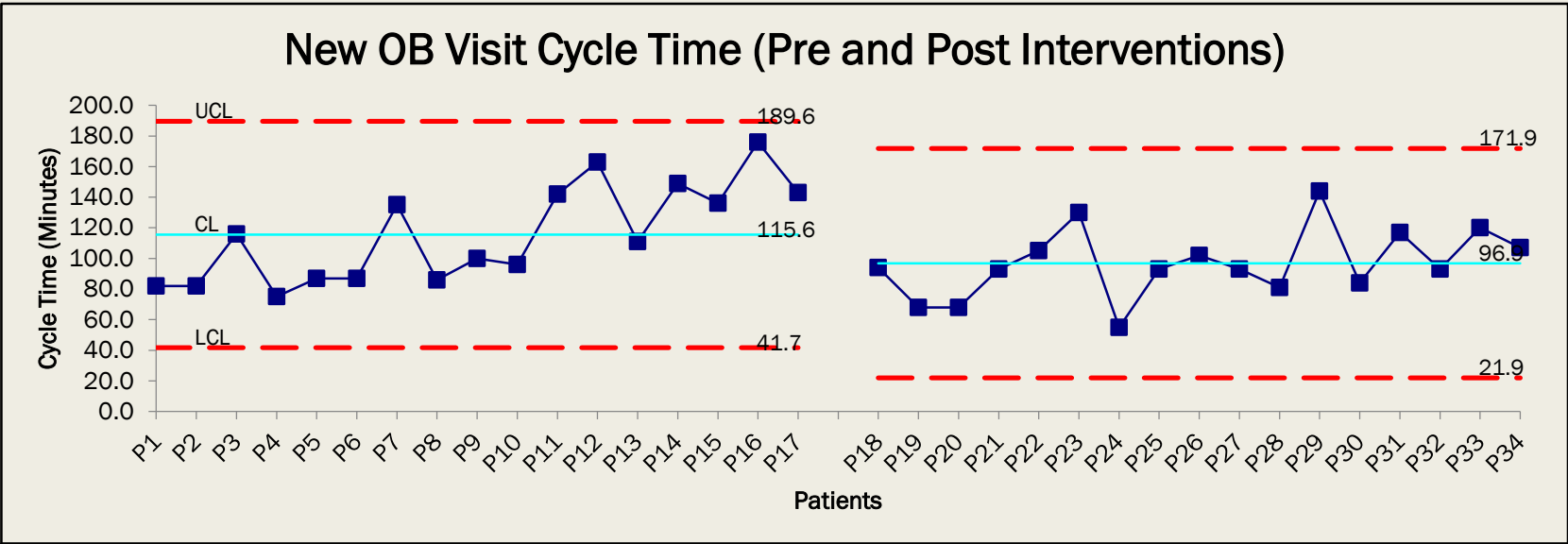
ACT: Sustaining the Results

- Implement MyChart OB Questionnaire to all New Patients by February 2017

- Develop Patient Education

- Continue to Stream Line Workflows as Necessary

- Employee and Physician Engagement

Return on Investment

- With Decreased Patient Appointment Cycle Time We Can:
  - Increase New OB Visits Per Session (72 Sessions Per Month) Thus Increasing Department Reimbursement
    - 2-4 Visits Per Session
    - 144-288 New OB Appointments Per Month
    - OB Global Reimbursement Per Patient: Around $2000
    - $2,000 X 144-288=**$288,000-$576,000** a Month

- Overtime Reduction:
  - *Decreased from October 2016: $3,611.79 to November: $1,195.86 (66.89%)*

- Increased Patient Satisfaction-Patient Satisfaction Scores
  - *Patient Experience Practice Champion Award*
  - *September 2016: 93.84%*
  - *October 2016: 92.54%*
  - *November 2016: 94.55%*
  - *December 2016: 94.94%*

Conclusion

- Minimized Appointment Cycle Time That Has Enabled Us To:
  - *Increase Access and Patient Volumes*
  - *Increase Patient Satisfaction*
  - *Reduced Overtime Expenses*
  - *Streamline Workflows for Better Efficiency*
  - *Appropriately Assign Each Staff Member's Respective Responsibilities*
  - *Increased Patient Use of MyChart*

What's Next

- Increase Same Day Appointment Availability:
  - *1 Appointment Per Session (Half Day) Per Physician (72 Sessions Per Week)*
  - *72 Same Day Appointments a Month*
- MyChart NEW OB Questionnaire Live Implementation- February 2017
  - *Anticipate an average time reduction of 2 min*
- Sustain Workflow & Responsibilities
- Continue Quality Improvement Efforts

Thank you!