Optimizing Patient Flow

Stephen Horan, PhD

Caitlin Feller, MPP, PCMH CCE

Community Health Solutions

April 17, 2017

Overview

- A great big thank you for sharing!

- Quick refresher on best practice resources

- (Re) introduce Design Thinking

- Apply Design Thinking to patient flow challenges

- Simple Process Guide for using Design Thinking in your organization

Community Health Solutions

Thank You for Sharing!

- We asked.
- You delivered.

Community Health Solutions

Thank You for Sharing!

We created a new position at the front to help with patient flow, the conductor. The conductor greets all visitors, vendors and/or clients of the health center finding out what they need and helps guide them appropriately. This helps to alleviate congestion at the front, gives potential clients information on services, the registration process etc. and provides back up to the front desk staff.

We designated one of our front desk staff personnel to act as a "call center". This has freed the other front staff members to address patients as they come to the window and not worry about answering the telephone.

1)We updated our new patient forms and shorted them as much as possible. 2)We message the clinical staff when a patient is checked in and forms are completed to be sure that they know a patient is ready to be taken back. 3)We will be implementing a kiosk 4)We have a flag system on each exam room door that alerts the provider when a patient is ready and waiting.

Community Health Solutions

Thank You for Sharing!

Having patients prepared for their visit helps to optimize patient flow at the front desk. Patients are informed prior to their visit of the necessary documents they should bring to their appointments (insurance cards, photo id, etc.) and to arrive 15 minutes early. Patients applying or needing to renew the sliding fee scale are also advised to bring in the proper proof of household income. New patients can also download the registration form from our website which helps speed the registration process once they are in the office.

We mail new patient info prior to the visit and we also have new patient forms on the website. We ask that patients return before the first appointment when possible. We plan to implement kiosk for patients to update information that should drop into our EHR immediately so clinical has updated info when they bring the patient back.

Front desk prints the "out of work/school notes " and gives it to patient/parent at end of visit. They also print out the visit summary and give it to the patient/parent at end of visit.

Community Health Solutions

Thank You for Sharing!

We eliminated the need for patients to line up at the front desk post visit to reschedule their follow up appointments. Many times, if there was a wait or line, patients historically just left the facility without scheduling a follow up.

Created a Front Desk Manual so front desk at all sites have the same process and procedure information. In the process of training a Care Coordinator who will register all new patients before they are seen. Will remove all incoming calls from the front desk.
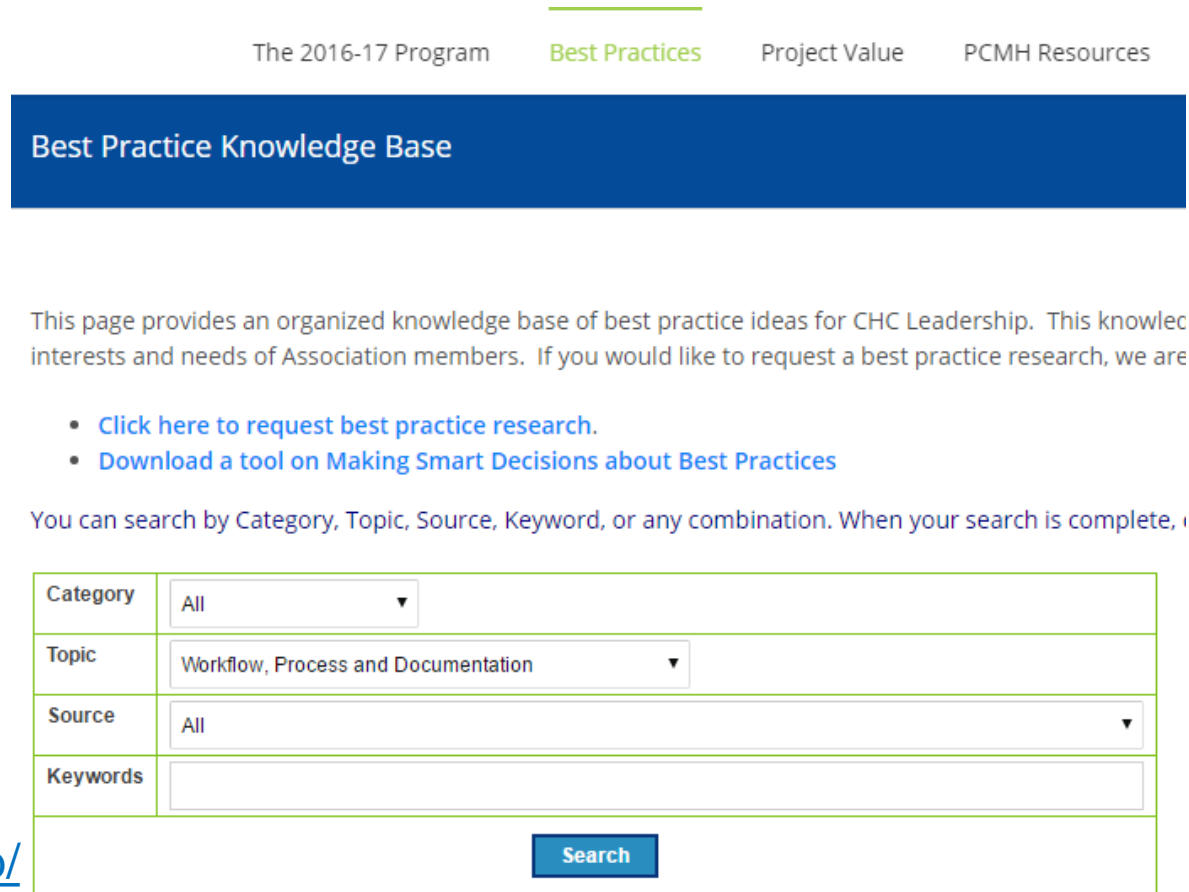
Our patient portal permits patients to update registration and other business forms which expedites the their visit at the front desk.

We have examined our patient flow from the front desk back to the rooming of patients, seeing the provider and are working to make sure no patient is left unattended until the visit is over.

A Quick Refresher

- Our **Best Practice Knowledge Base** has multiple resources on improving patient flow

http://chcleadership.com/best-practice-kb/

The 2016-17 Program   **Best Practices**   Project Value   PCMH Resources

Best Practice Knowledge Base

This page provides an organized knowledge base of best practice ideas for CHC Leadership. This knowled interests and needs of Association members. If you would like to request a best practice research, we are

- Click here to request best practice research.
- Download a tool on Making Smart Decisions about Best Practices

You can search by Category, Topic, Source, Keyword, or any combination. When your search is complete,

Category	All
Topic	Workflow, Process and Documentation
Source	All
Keywords	

Search

Community Health Solutions

The Patient Flow Challenge

- How can we optimize patient flow for the good of our patients and our team?
  - One approach is to adopt best practices from other places – we have resources for this on the CHC Leadership Institute website.
  - Sometimes we cannot find a best practice that fits, and so we have to create or refine a solution. This is where Design Thinking can help.

Working Definitions

- ## Patient Flow

  - Patient flow can be defined as the process by which patients interact with their health care providers.

  - For primary care providers, patient flow begins before the visit, extends through each step during the visit, and continues through post-visit follow-up.

Community Health Solutions

Working Definitions

- Design Thinking
    - Design Thinking is a team-based, customer-focused process for creative problem solving.
    - Design Thinking can be applied in physical design and process design, including patient flow within health care organizations.
    - Design Thinking is helpful when you must improve a process that affects multiple people, and the solution requires creative design.

Community Health Solutions

The Design Thinking Process

Choose the Focus * Engage the Team * Start the Process * Repeat to Success

Empathize
- Identify the 'customer'
- Find out what they want, need, and value through interviews and observation

Define
- Define the challenge you are trying to solve
- Define criteria for evaluating possible solutions

Ideate
- First generate a broad range of solution ideas
- Then choose a few that show promise

Prototype
- Design one or more prototype solutions
- Design with the customer and criteria in mind

Test
- Test the prototype(s) in small trials
- Solicit feedback and repeat to success

Community Health Solutions

Some Design Thinking Principles

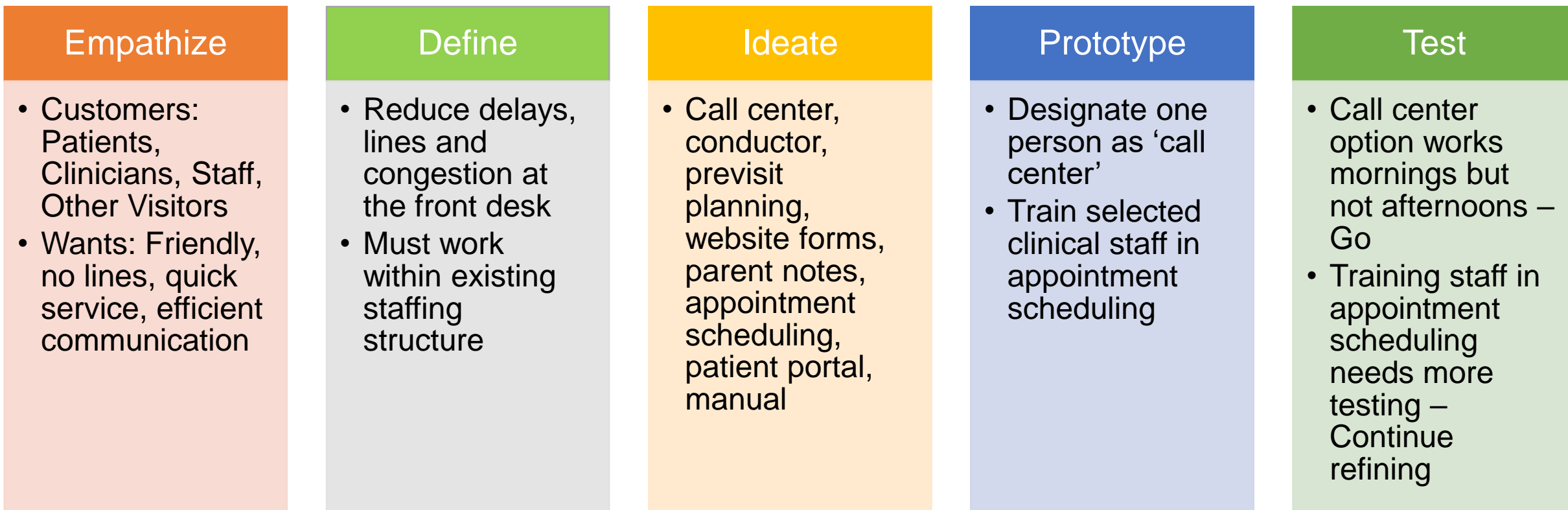| Empathize	Define	Ideate	Prototype	Test
• Design Thinking begins with understanding and caring about your customers	• It is essential to frame the problem correctly I order to produce the right solution	• The best way to find the right solution is to generate a broad range of potential solutions	• Design for your customer and follow where that leads	• There is no failure, only feedback

The Power of Design Thinking is in the Team

The Power of the Team

- Design Thinking works best when:
  - Everyone feels welcome to engage
  - Everyone is committed to learning and action
  - Everyone feels comfortable sharing ideas
  - Everyone is willing to let the best ideas win
  - Everyone shares the credit

Community Health Solutions

An Example: Optimizing Front Desk Flow

Empathize
- Customers: Patients, Clinicians, Staff, Other Visitors
- Wants: Friendly, no lines, quick service, efficient communication

Define
- Reduce delays, lines and congestion at the front desk
- Must work within existing staffing structure

Ideate
- Call center, conductor, previsit planning, website forms, parent notes, appointment scheduling, patient portal, manual

Prototype
- Designate one person as 'call center'
- Train selected clinical staff in appointment scheduling

Test
- Call center option works mornings but not afternoons – Go
- Training staff in appointment scheduling needs more testing – Continue refining

Focus: Front Desk Flow * Engage the Team * Start the Process * Repeat to Success

Community Health Solutions

So…How long does this take?

- **Two-Meeting Scenario**
  - Assumes customer insight is in the room for Meeting 1
  - Meeting 1:
    - Focus, Empathize, Define, Ideate, Prototype
  - Action Period:
    - Test
  - Meeting 2:
    - Review Test results and decide next steps

- **Three-Meeting Scenario**
  - Meeting 1:
    - Focus, Empathize (Define customers)
  - Action Period:
    - Gather customer insight
  - Meeting 2:
    - Define, Ideate, Prototype
  - Action Period:
    - Test
  - Meeting 3:
    - Review Test results and decide next steps

Community Health Solutions

Ready to try one together?

Optimizing answering patient telephone calls during office hours

- Empathize

- Define

- Ideate

- Prototype

- Test

Community Health Solutions

The Importance of Choosing a Focus

- A question:
  - How can we optimize rooming protocol and pre-visit planning for same day appointments?

- The best strategy is to separate these into two design exercises
  - Thinking about pre-visit planning first
  - Then tackle rooming protocol

Community Health Solutions

Summary Points

- Thank you for sharing best practices in patient flow!

- Remember the best practice resources at
  http://chcleadership.com/best-practice-kb/

- Use Design Thinking to solve process challenges that involve multiple people and require creative design.
  - Teach Design Thinking to the team
  - Create a culture of Design Thinking
  - Use Design Thinking solve all kinds of process challenges

Community Health Solutions