Thirty Minute Schedule Template

NEW HORIZONS HEALTHCARE

CHC LEADERSHIP INSTITUTE LEARNING PROGRAM 2016-17

CAPSTONE TEACHBACK: JUNE 6 & 7, 2017

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1. Focus

The focus of this project is to design a new and improved scheduling template for New Horizons Healthcare.

2. Team

List the team members who worked on the project:

- Kevin Harvey, Front Office Manager
- Sonya Harvey-Jackson, Clinical Manager
- Katye Hale, Behavioral Health Case Manager
- Andree McTyson, Human Resources Specialist
- Ruthie Peevey, Family Nurse Practitioner

3. Need

Describe the specific need(s) your project aimed to address:

- ◦ Decrease confusion for the front office staff when scheduling.
- ◦ Improve patient satisfaction.
- ◦ Improve quality of care.
- ◦ Increase provider satisfaction.
- ◦ Most importantly, to improve Kevin Harvey's satisfaction (with fewer provider complaints).

4. Objectives

Describe the specific objectives your team aimed to achieve:

- Do away with our typical 15 minute schedule template (with 30 minute new visit appointments, 30 minute hospital follow up appointments, and 30 minute English as a Second Language (ESL) appointments.
- Start scheduling on a 30 minute template.
  - 30 minutes for all appointments with one 15 minute "same day" or "follow up" overbook appointment every hour.

Sample Template

8:00	Huddles			1:00		
8:15	Phone Visit			1:15	Office Visit - 30 Minutes	
8:30				1:30		
8:45	Office Visit - 30 Minutes	Same Day Visit		1:45	Office Visit - 30 Minutes	Same Day Visit
9:00				2:00		
9:15	Office Visit - 30 Minutes			2:15	Office Visit - 30 Minutes	
9:30				2:30		
9:45	Office Visit - 30 Minutes	Same Day Visit		2:45	Office Visit - 30 Minutes	Same Day Visit
10:00				3:00		
10:15	Office Visit - 30 Minutes			3:15	Office Visit - 30 Minutes	
10:30				3:30		
10:45	Office Visit - 30 Minutes	Same Day Visit		3:45	Office Visit - 30 Minutes	Same Day Visit
11:00				4:00		
11:15	Office Visit - 30 Minutes			4:15	Office Visit - 30 Minutes	
11:30				4:30		
11:45	Office Visit - 30 Minutes			4:45	Office Visit - 30 Minutes	
12:00	Lunch			5:00	Huddles	

5. Assets

Describe the key assets (people, systems, resources) your team engaged to help develop and execute the project:

- Kevin Harvey spoke with senior leadership to get their blessing for this project and then designed the template to be used.

- Front office staff (patient access representatives) were trained on the use of the new template.

- Ruthie Peevey's schedule was used as the pilot for this project.

6. Action Strategies

Describe the key action strategies your team used to execute the project:

- ◦ The pilot was rolled out for six weeks in duration from April 17th through May 26th.
- ◦ At the completion of the pilot we compared the numbers from those six weeks with the six weeks just prior to the pilot and another six week period of time one year prior to the pilot.

7. Team Development

Describe the team development activities (e.g. team building, training, technical assistance) you used to help equip the team for action.

- ◦ We all met together to decide upon a project.
- ◦ Front office staff and nurses were trained on the anticipated workflow.
- ◦ The template was adjusted in eCW.

8. Testing & Refinement

Describe how your team refined its planned action strategies based on your experience with implementation:

- We noticed in the first week of the pilot that the front office staff were under-utilizing the overbook slots. All eight of those slots were designated for "same day" visits at that time so we changed them so that half were for "same days" and the other half were for general follow up visits.

- Incidentally, we have open access schedules every afternoon (providers take turns) so there are always same day slots available, though not necessarily with a patient's usual PCP.

- Ruthie Peevey continued to see patients on her open access day (Monday afternoon) on fifteen minute appointment slots.

9. Results to Date

Describe the results of your project to date, and any planned next steps:

- Pilot:
  - Percentage of kept appointments: 69.93%
  - Average number of patients seen/day: 13.5
  - Average number of patients seen/hour: 1.68
- Six Weeks Prior
  - Percentage of kept appointments: 69.6%
  - Average number of patients seen/day: 14.1
  - Average number of patients seen/hour: 1.76
- One Year Prior
  - Percentage of kept appointments: 66.5%
  - Average number of patients seen/day: 12.78
  - Average number of patients seen/hour: 1.6

10. Lessons Learned

Describe your key lessons learned:

- Our clinic's goal for each provider is to see 2.25 patients/hour.

- We did not meet that goal; but as it turns out… we never meet that goal.

- Overall the numbers weren't much different than previously.

- There were far fewer mistakes when scheduling, thus an increase in provider and front office satisfaction.

- We did not measure clinical quality outcomes with this project but we did not have any patient complaints and we did not feel anyone waited longer than usual for their appointment slot.

- Front office still seemed hesitant to use the "overbook slot."

- Moving forward, an easier system and a system that would still allow for 24 appointment slots/day would be to schedule everyone on 20 minute appointment slots (regardless of visit type). This should take all the confusion out of scheduling and should still allow a cushion for our ~30% no show rate.