

MUCH MORE
THAN I.T.

OPPORTUNITY

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



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Sr. Consultant with Galen Healthcare Solutions

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



Solving for Today. Preparing for Tomorrow.



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

A screenshot of the Cisco WebEx Event Center interface. The main window displays a webcast titled "OPPORTUNITY" with the Galen Healthcare Solutions logo and the text "MUCH MORE THAN I.T." and "Welcome to Today's Webcast". The text "The webcast will begin shortly..." is also visible. On the right side, there is a sidebar with a "Participants" panel and a "Q&A" panel. The "Q&A" panel is highlighted with a red box, showing a dropdown menu with "All (0)" and a "Send" button. The "Q&A" icon in the top right corner is also highlighted with a red box. The bottom status bar shows "Connected" with a green dot.

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 maximizing desired factors and minimizing undesired ones

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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: Improve quality, safety, efficiency, and reduce health disparities. Engage patients and family. Improve care coordination, and population and public health

PCMH (Patient Centered Medical Home)

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

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."

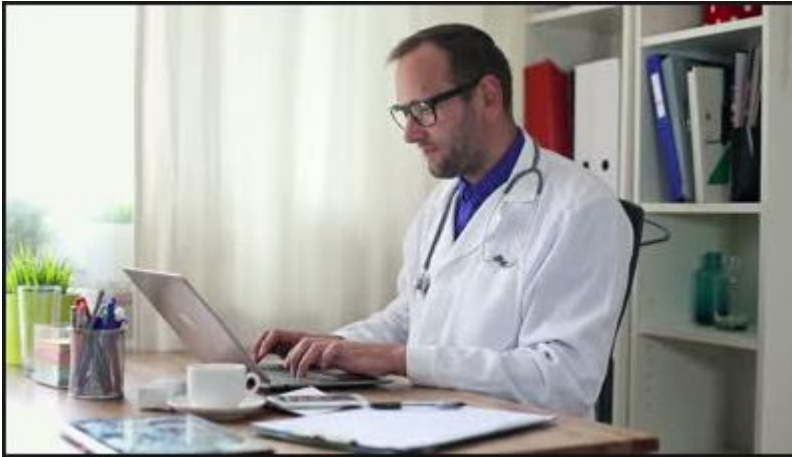
Workflow Processes (Clinical)

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



Workflow Processes (Clinical)

7. Results Processing



Workflow Processes (Clinical)

9. Medications Refills/Changes

Formulary	Status	Medication Name	Generic Name	Method	Original Start Date	Start Date	Stop Date
Status: Active (15 items)							
	Active	allopurinol 100 mg Tab	ALLOPURINOL	100 mg ORAL TABLET	07/25/2011	08/06/2013	
	Active	allopurinol 300 mg Tab	ALLOPURINOL	300 mg ORAL TABLET	07/25/2011	08/06/2013	
	Active	Aspirin 81 mg Tab	ASPIRIN	81 mg ORAL TABLET	07/21/2010	07/21/2010	
	Active	Cialis 20 mg tablet	TADALAFIL	20 mg ORAL TABLET	11/20/2013	11/20/2013	
	Active	Diovan 160 mg Tab	VALSARTAN	160 mg ORAL TABLET	11/14/2011	08/06/2013	
	Active	Dipyridamole 75 mg Tab	DIPYRIDAMOLE	75 mg ORAL TABLET	07/21/2010	08/06/2013	
	Active	Flonase 50 mcg/Actuation Nasal Spray	FLUTICASONE PROPIONATE	50 mcg NASAL SPRAY SUSP	11/09/2010	10/24/2013	
	Active	Glucophage 1,000 mg Tab	METFORMIN HCL	1,000 mg ORAL TABLET	06/23/2011	08/06/2013	
	Active	hydrocodone-acetaminophen 10 mg-32...	HYDROCODONE BIT/ACETAMI...	10 mg-325 mg ORAL TABLET	01/22/2013	12/24/2013	
	Active	Lasix 20 mg Tab	FUROSEMIDE	20 mg ORAL TABLET	04/02/2009	08/06/2013	
	Active	Naproxen 375 mg Tab	NAPROXEN	375 mg ORAL TABLET	09/15/2010	01/08/2014	
	Active	Neurontin 300 mg Cap	GABAPENTIN	300 mg ORAL CAPSULE	04/02/2009	08/06/2013	
	Active	Omeprazole 20 mg Cap, Delayed Release	OMEPRAZOLE	20 mg ORAL CAPSULE DR	10/20/2009	08/06/2013	
	Active	Pravachol 20 mg tablet	PRAVASTATIN SODIUM	20 mg ORAL TABLET	08/07/2013	08/07/2013	

Prescribe New
Print
Ex
Renew
Interactions
Stop
Education
Dose Range
Delete
Eligibility
Medication History

Diovan 160 mg Tab
Has Been Dispensed / Encounter Is Locked

Sig: take 1 by Oral route every evening [Additional Text](#) Remove Sig

Quantity: 30 Units: Tablet Refills: 4

Start: 08/06/2013 Stop: 01/08/2014 Duration:

Dispense As Written
Prescribed Elsewhere Site:
PRN Reason:
Problem: Add...

Accept
Cancel

Any additional clinical instructions for this prescription should be added using the 'Additional Instructions' segment of the Sig Builder.

Workflow Processes

10. Triage/Call Processing



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Review

Collaborate

Improve

Finalize

Strategize



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

A	C	D	E
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

A	E	F
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

A	E	G
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

A	E	G	H
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

A	H	I
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

Metrics: Task Owner

A	E	G	H	I	J	K
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

Note Analytics & Optimization

1. Date
2. Provider
3. Document Type
4. Total number of Notes created
5. Finalized by 6pm
6. Finalized by 10pm

A	B	C	D	E	F	G	H	I	J
Year	Month	Day	LastName	FirstName	Document Type	Entry Name	Total Notes Created	Finalized By 6PM	Finalized By 10PM
2013	11	27	Number 1	Provider	221	Office Visit	16	6	6
2013	11	26	Number 1	Provider	221	Office Visit	19	9	9
2013	11	26	Number 1	Provider	221	Office Visit	11	5	5
2013	11	25	Number 1	Provider	221	Office Visit	14	7	9

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.

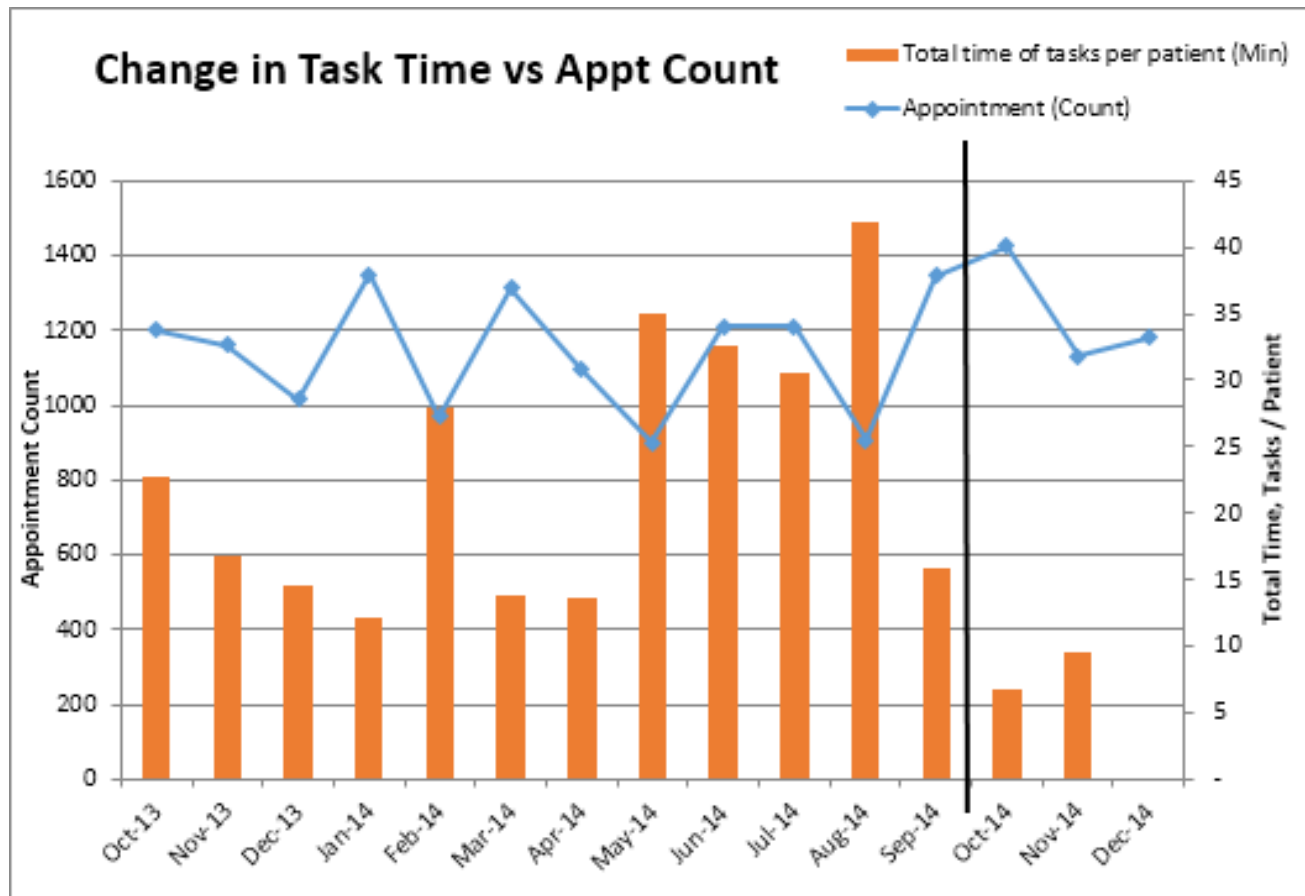
- ROI report showing time of tasks per patient Pre and Post Optimization

<u>OCT - NOV</u>					
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%

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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

Real Life Examples Cont.

Snapshot of Notes completed by 6pm

	Notes Finalized By 6PM	
Row Labels	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

	Notes Finalized By 10PM	
Row Labels	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

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

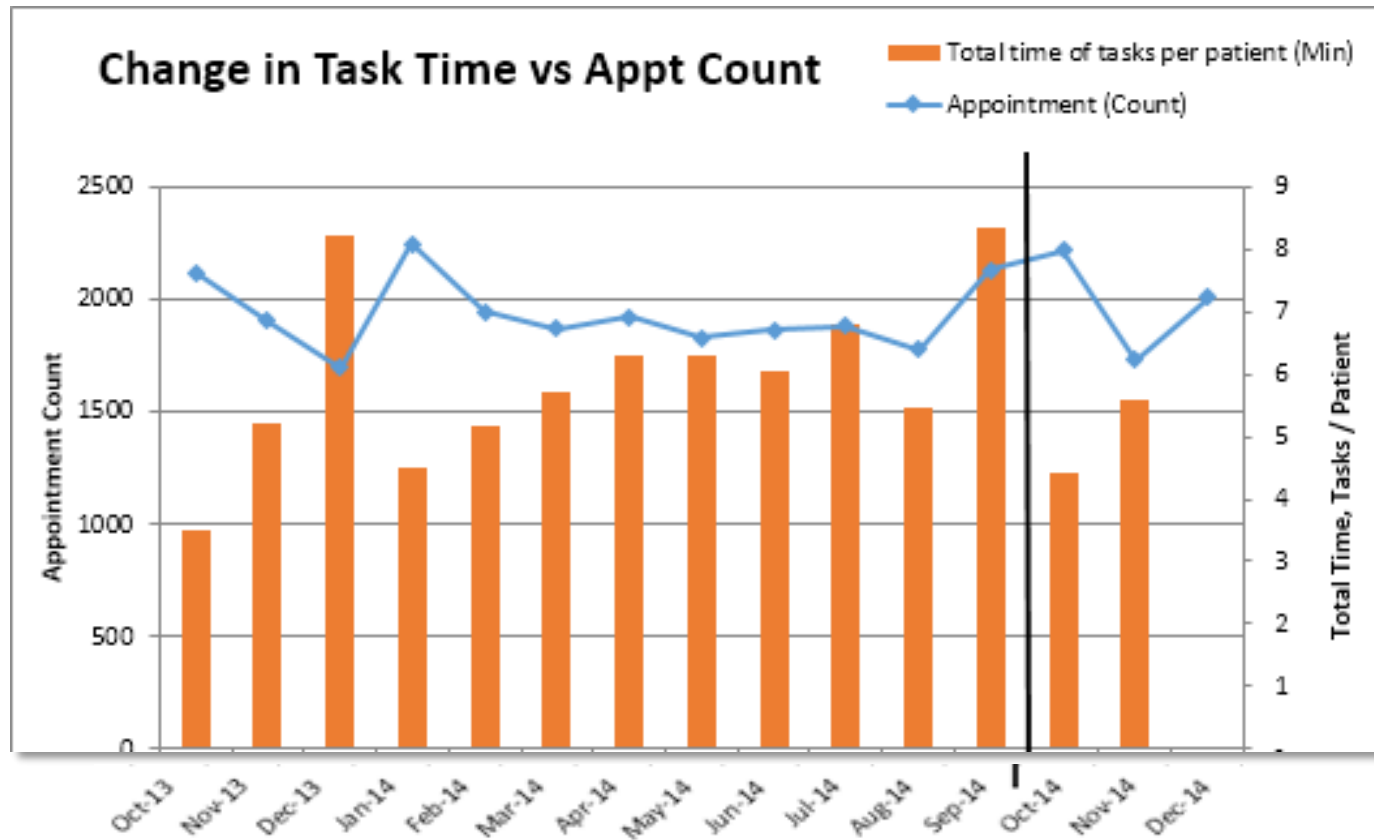
Real Life Examples Cont.

- 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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Optimization and You

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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