

Tasking Analytics and Optimization

August 22, 2014

Solving for today. Preparing you for tomorrow

Embrace the new world of healthcare



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

The screenshot shows the Cisco WebEx Event Center interface. The main window displays a presentation slide with the title "Embrace the new world of healthcare" and the Galen Healthcare Solutions logo. The slide content is divided into three columns: "PROFESSIONAL Services" (Project Assessment and Project Management), "Implementation Services", and "Connecting Community Healthcare". A red arrow points from the "Connecting Community Healthcare" section to the Q&A panel on the right. The Q&A panel is titled "Q&A" and has a "Collapse the panel" button. Below the panel title, there is a text input field with a placeholder that says "Select a participant in the ask menu first and type your question here. There is a 256 character limit." and a "Send" button. The "Participants" panel on the right shows a list of participants, including "Galen Healthcare Solutions (host)" and "Tracy Kimble". The "Ask" dropdown menu is set to "All Panelists".

Cisco WebEx Event Center - Dry Run - charge

File Edit View Communicate Participant Event Help

Info Intro Slides

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GALEN HEALTHCARE SOLUTIONS

The webcast will begin momentarily...

PROFESSIONAL Services

Project Assessment

Galen can leverage its extensive EHR experience to appraise the condition of your EHR rollout. Drawing on its history of leading successful EHR deployments, Galen will identify areas of weakness to mitigate risk and put the project back on track.

- Evaluate Current State
- Review Organizational Goals
- Create Road Map to Success

Project Management

Galen provides project management solutions to help ensure your EHR rollout success. Galen will provide your organization with the experience necessary to identify, reduce and eliminate project risks.

- Implementation Management
- Resource Management
- Project Plan Design and Execution
- Site Preparation

Implementation Services

Galen's keen understanding of EHR functionality and technical infrastructure uniquely positions it to positively impact every aspect of the EHR implementation process.

- Review and Document Current State Workflows
- Evaluate Design Requirements
- Develop Future State Design

Connecting Community Healthcare

Galen understands the challenges that come with extending your EHR to physicians outside of your organization. Whether you're taking advantage of Stark Relaxation or just trying to provide a way for community physicians to get a complete view of their patients, Galen can help you through the process. Together, we can review your unique situation and help structure an EHR that creates a seamless community connection.

vitalcenter GALLEN

Participants

Q&A

Participants

Name Tools

Panelists: 1

Galen Healthcare Solutions (host)

Attendees:

Tracy Kimble

Mute Ask for Me

Q&A

Collapse the panel

Ask: All Panelists

Select a participant in the ask menu first and type your question here. There is a 256 character limit.

Send

Agenda

- **Task Overview**
- **Task Properties**
- **Delegated vs Undelegated Tasks**
- **Task List Views**
- **Task Status**
- **Why “Tasking Analysis”?**
- **Tasking Metrics**
- **Real World Examples**
- **Best Practice Tasking**

What do you mean “Tasking Analytics?”

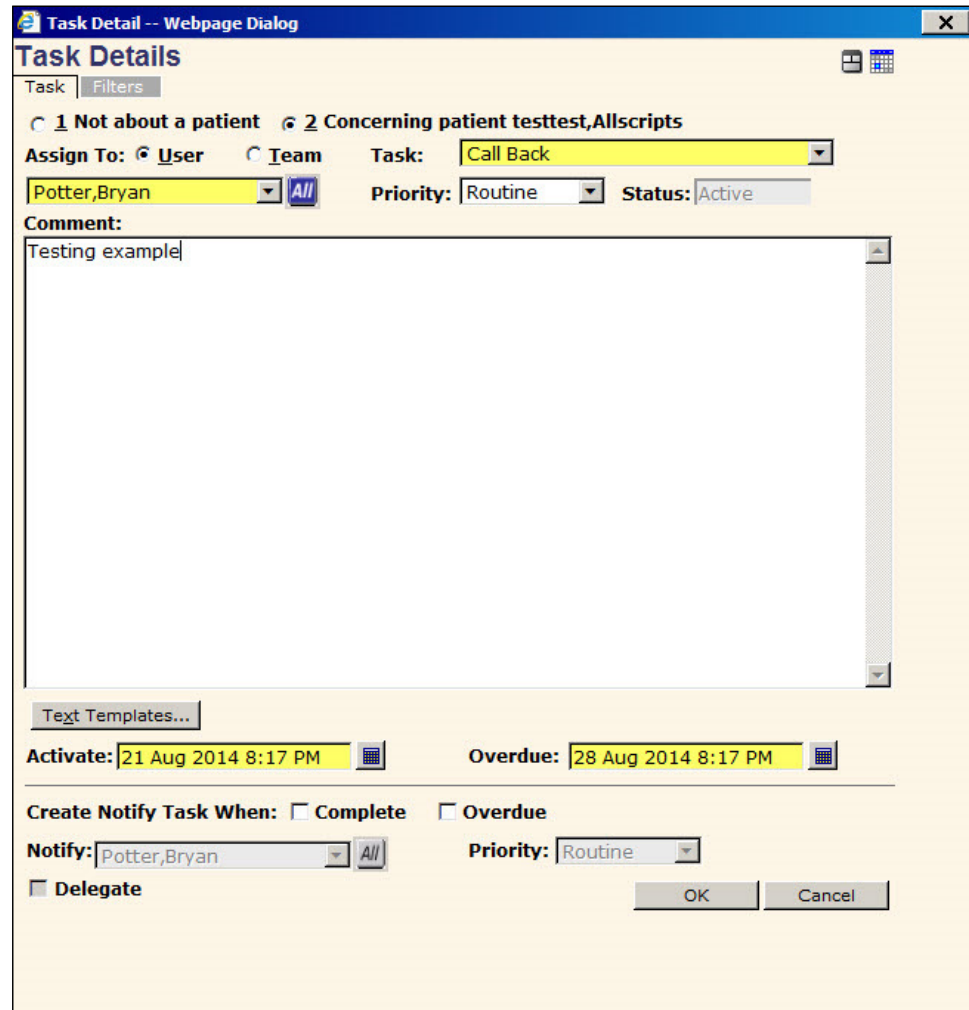
- **Snapshot of the current state of Tasking environment**
- **Identify any gaps in clinic workflows, training, or a combination of the two**
- **Make recommendations for new Task structure**
- **Implement approved Task changes**

Task Overview

- **Tool to distribute work action items and responsibilities to members throughout a medical organization**
- **The EHR's electronic "sticky notes"**
- **Manually generated and system-created**
- **Higher level of accountability and efficiency**

Task Properties

- **Assign To**
- **Priority**
- **Status**
- **Activation date**
- **Overdue date**
- **Comment**
- **Task About**



The screenshot shows a web-based dialog box titled "Task Detail -- Webpage Dialog". The main section is "Task Details". At the top, there are two radio buttons: "1 Not about a patient" (selected) and "2 Concerning patient testtest,Allscripts". Below this, the "Assign To:" field has "User" selected, with a dropdown showing "Potter,Bryan" and an "All" button. The "Task:" dropdown shows "Call Back". The "Priority:" dropdown shows "Routine", and the "Status:" field shows "Active". A large text area for "Comment:" contains the text "Testing example". Below the comment area is a "Text Templates..." button. The "Activate:" field shows "21 Aug 2014 8:17 PM" and the "Overdue:" field shows "28 Aug 2014 8:17 PM". Under "Create Notify Task When:", there are checkboxes for "Complete" and "Overdue", both of which are unchecked. The "Notify:" dropdown shows "Potter,Bryan" and an "All" button. The "Priority:" dropdown shows "Routine". There is a "Delegate" checkbox which is unchecked. At the bottom right are "OK" and "Cancel" buttons.

Task Properties

Priority:	Routine
	ASAP
	Routine
	Urgent

Task Status

- **Active**
- **Complete**
- **Inactive**
- **In Progress**
- **Removed**

Delegated vs Undelegated tasks

- **Tasks can be delegated.**
- **Generally for system-generated tasks for specific providers**
- **Never display on a user's My Active Task view**
- **Requires delegated task views and workflows**
- **Not possible to delegate a task on an ad hoc basis**

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Task Properties

View: My Active Tasks View Desc... **Show:** 50

P	D	Task	Patient	Assigned To	Created By
✖		Call Back	Test,Touchworks3	Potter,Bryan	Potter,Bryan
⚠		Call Back	Test,Touchworks3	Potter,Bryan	Potter,Bryan
		Finish Note	testtest,Allscripts	Potter,Bryan	System
		Finish Note	testtest,Allscripts	Potter,Bryan	System
		Sign-Note	Test,Touchworks3	Potter,Bryan	System

Created On	Status	ID	Due	MRN
08/21/2014 08:15	Active	1758594		140404133131553
08/21/2014 08:15	Active	1758593		140404133131553
01/14/2014 10:32	Active	1623058	☹	121112143642420
01/14/2014 11:08	Active	1623060	☹	121112143642420
05/05/2014 01:56	Active	1757195	☹	140404133131553
05/05/2014 01:56	Active	1757196	☹	140404133131553

Task Properties

Comments:

Potter,Bryan - 21 Aug 2014 8:33 PM
TASK EDITED
Pt called complaining of a sore throat and cough
Potter,Bryan - 21 Aug 2014 8:15 PM
TASK EDITED
Potter,Bryan - 21 Aug 2014 8:15 PM
TASK CREATED

[Go To...](#)

[In Progress](#)

[Done](#)

[Undelegate](#)

Task About:

Note Date: 14 Jan 2014 10:32 PM
Note Type: Established
Note Owner: Potter, Bryan

[New...](#)

[Reply...](#)

[Reassign...](#)

[Remove...](#)

[Copy To Note](#)

[Details...](#)

[Original...](#)

[Print List...](#)

[Print Task...](#)

Task List Views

- **Tasks can be organized and filtered based on task properties in to groups called Task List Views**
 - Enterprise vs Personal Tasklist Views
 - Enterprise Views are created or managed by a system administrator for use by all users at a site; whereas, Personal Views are created by a specific user for his or her own use
 - 20 preconfigured

Delivered Task List Views

Adjust Charges

Current Patient - Active

Current Patient - All

Current Patient - Active (last 30 days)

Current Patient - Active (last 6 months)

Current Patient - All (last 30 days)

Current Patient - All (last 6 months)

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Delivered Task List Views

Denied Renewal Requests

Local Patient Merge

Manage Charge Edits

My Active Tasks

My Completed Tasks for Today

My Removed Tasks for Today

Overdue Tasks

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Delivered Task List Views

Request Correction

Results Communication

Results-Referral Orders

Review Encounter Tasks

TW Provider Order-Result Mgmt

My Future Tasks

What's Included, What's Not

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

Why Tasking Analytics?

Optimization

- Tasking is too time-consuming
- Tasking & Task View clean up
- Compiling 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

Real Life Examples

- Inactivate and “migrate” workflow to Worklist
- Tasks relating to Orders and Results
- Tasks that are auto-resolved by the system
- e.g. Schedule Appointment task

Daily	Clinical Desktop	Worklist	Note	Task List	Documents	Encounter Form	Diagnosis	Visit Charges	Procedure Charges																		
Allscripts, Allison T MRN: ZZZTW01 Age: 41 Years AKA: Ally Security: No Restricted Data DOB: 03/05/1973 Sex: F Email: Note: Select Allergies: Med & Non Med SSN: FYI: FYI PCP: Allscripts, Provider																											
Task List																											
View: <input type="text" value="Current Patient - Active"/> <input type="button" value="View Desc..."/> Show: <input type="text" value="50"/>																											
<table border="1"><thead><tr><th></th><th></th><th></th><th></th><th></th><th></th></tr></thead><tbody><tr><td>Y</td><td>Schedule Appointment</td><td>Allscripts, Allison T</td><td>Allscripts, Provider</td><td>System</td><td>08/21/2014</td></tr><tr><td>Y</td><td>Schedule Appointment</td><td>Allscripts, Allison T</td><td>Allscripts, Provider</td><td>System</td><td>08/06/2014</td></tr></tbody></table>																Y	Schedule Appointment	Allscripts, Allison T	Allscripts, Provider	System	08/21/2014	Y	Schedule Appointment	Allscripts, Allison T	Allscripts, Provider	System	08/06/2014
Y	Schedule Appointment	Allscripts, Allison T	Allscripts, Provider	System	08/21/2014																						
Y	Schedule Appointment	Allscripts, Allison T	Allscripts, Provider	System	08/06/2014																						

Real Life Examples Cont.

- Delegate and display in new Task View
- Tasks that are auto-resolved by the system
- e.g. Finish Note task

Daily	Clinical Desktop	Worklist	Note	Task List	Documents	Encounter Form	Diagnosis	Visit Charges	Procedure Charges
Allscripts, Cameron T				MRN: ZZZTW05	Age: 26 Years	AKA: Beth	Security: No Restricted Data		
DOB: 03/01/1988				Sex: F	Email:	Note: Select			
Allergies: Unknown				SSN:	FYI: FYI	PCP: Allscripts, Provider			
Task List									
View: <input type="text" value="Current Patient - Active"/>				<input type="button" value="View Desc..."/>	Show: <input type="text" value="50"/>				
Finish Note				Allscripts, Cameron T	Allscripts, Provider	System	06/09/2014		
Finish Note				Allscripts, Cameron T	Allscripts, Provider	System	06/11/2014		

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**
- **When delegating tasks, build views that group common tasks**
- **Maintain a comprehensive change document for tracking**

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Questions?

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

A screenshot of the GALEN Healthcare Solutions website. The header includes the company logo, navigation links (Blog, Wiki, Webcasts, Forum, Careers), a search bar, and a 'Company' dropdown menu. The left sidebar contains a 'Who We Serve' menu with 'Company' selected, a 'Work for Galen' button, and a 'vitalcenter' logo. The main content area is titled 'Contact Us' and features a form with fields for First Name, Last Name, Company, Phone, Email, City, and State/Province, followed by a 'Details' text area. A banner image of healthcare professionals is visible above the form.

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First Name *
Last Name *
Company *
Phone *
Email *
City *
State/Province *
Details