Tasking Analytics and Optimization
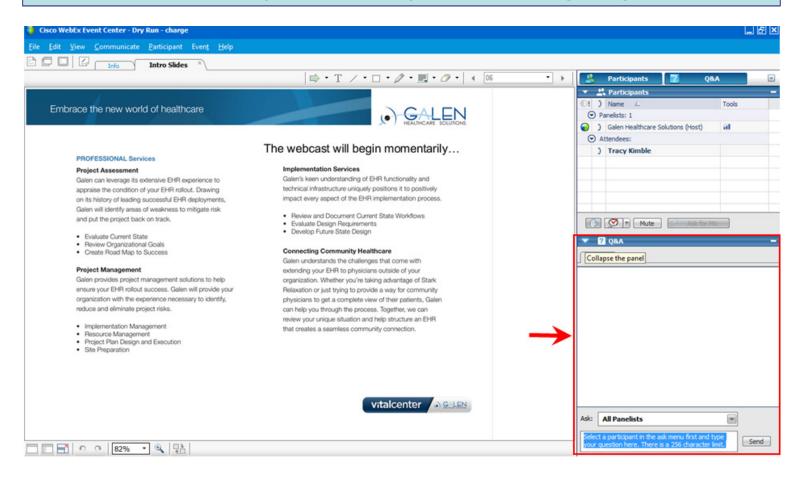
August 22, 2014

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.

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**
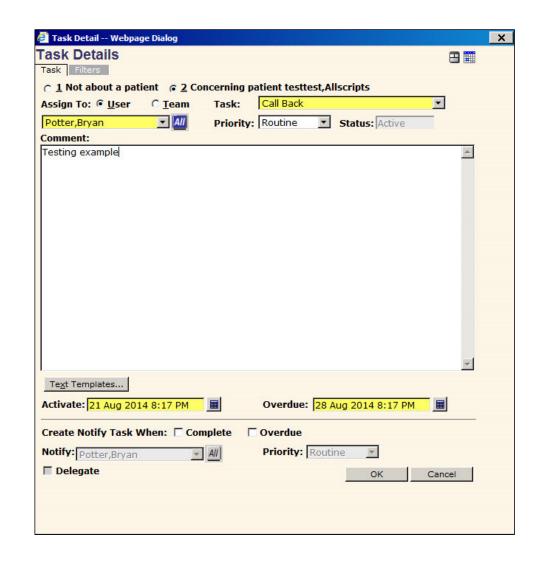- **Implement approved Task changes**

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**
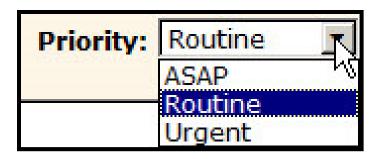
Task Properties

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

Task Properties

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**
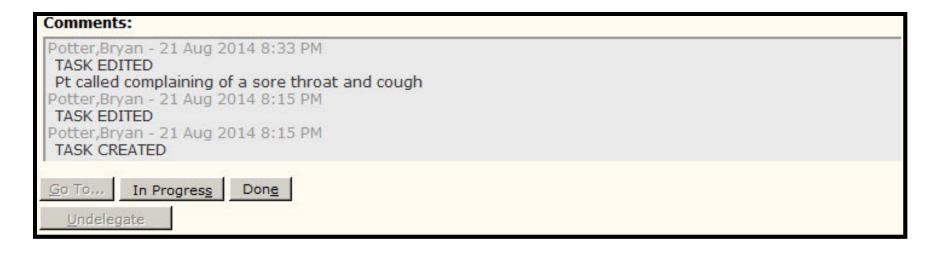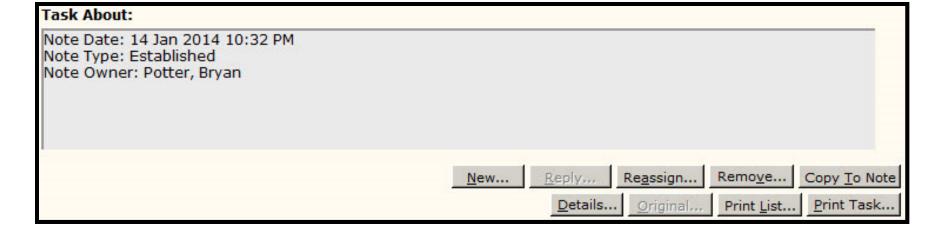- **Not possible to delegate a task on an ad hoc basis**

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)

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

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
								AvgHour
1	TaskName	Inactive	Delegated	Total	Active	Removed	Complete	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

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

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. <u>**Count Removed**</u>

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 TaskName	H Count Complete	I 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

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**

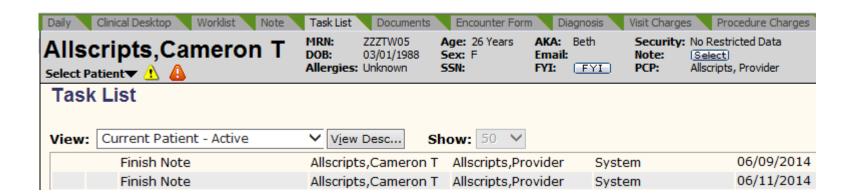|	A	B	C	D	E	F	G	H	I	J
	TaskName	Inactive	Delegated	Total	Active	Removed	Complete	AvgHour Complete	Recommendation	Details
	Sign Note	N	N	5245	136	113	4996	53	Delegate	Move to "Provider Sign Note" Task View
	Rx Renew Request	N	N	14884	0	2	14882	22	Delegate	Move to "RX Management" Task View
	Immunization 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**

Real Life Examples Cont.

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

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**

Questions?

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