



MacColl Institute at
Group Health Cooperative

Optimizing the Role of the Front Desk Staff

Moderator:

Katie Coleman, MSPH, MacColl Center for Health Care Innovation at Group Health Research Institute

Speakers:

Katie Bell, Chief Operating Officer, Neighborcare

Prathiba Pinnamaneni, Process Improvement Manager, Neighborcare





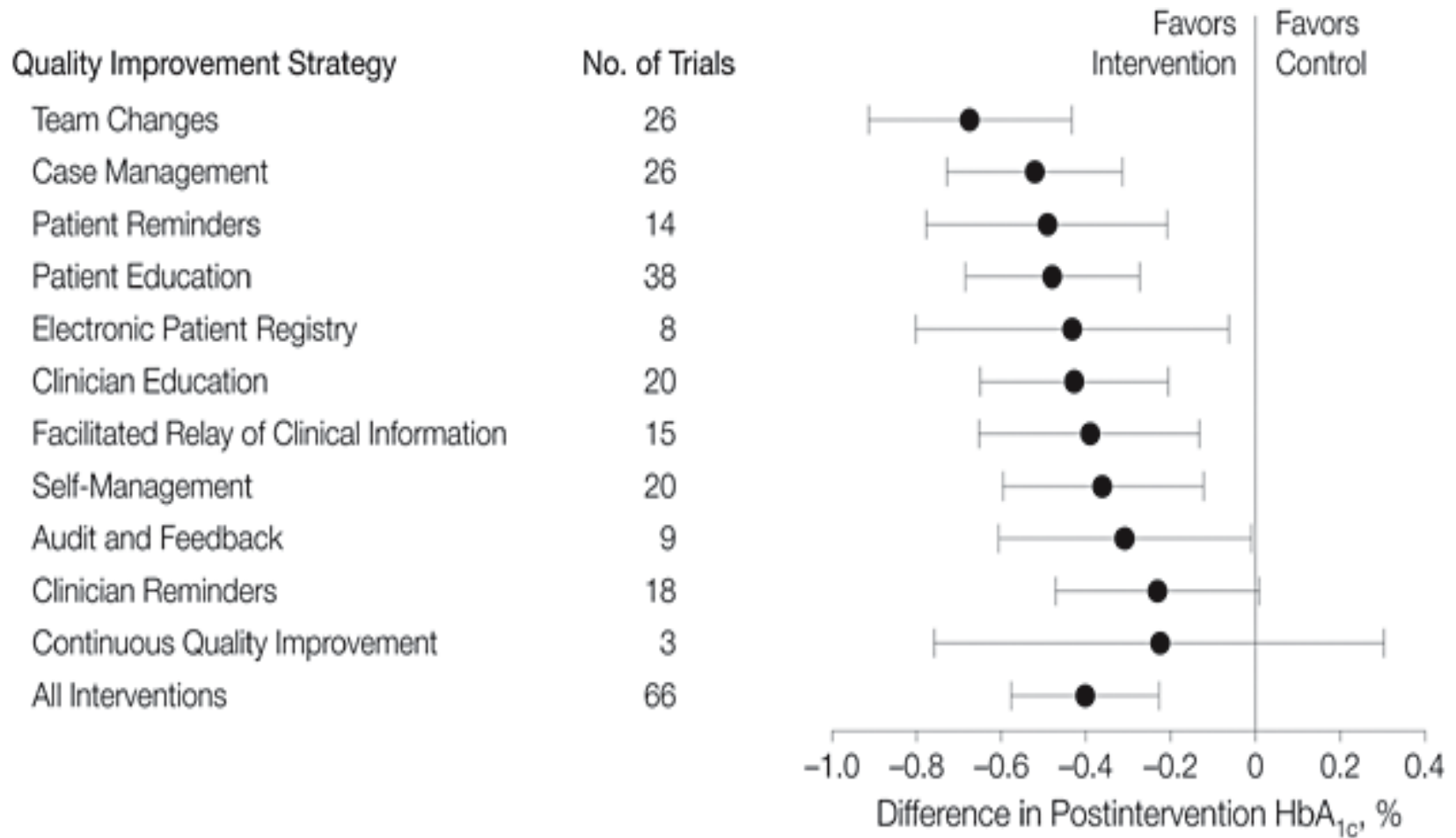
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Interventions to Improve Chronic Care



Greater Care Complexity

Preventive Care

7.4 hours

+

Evidence-based Care

10.6 hours



Primary Care: Is There Enough Time for Prevention? Kimberly S. H. Yarnall, Kathryn I. Pollak, Truls Østbye, et al. Am J Public Health. 2003 April; 93(4): 635–641. & Is there time for management of patients with chronic diseases in primary care? Østbye, T., Yarnall K.S., Krause, K.M. et al. Ann Fam Med. 2005 May-June; 3(3):209-14.

Continuous and Team-based Healing Relationships

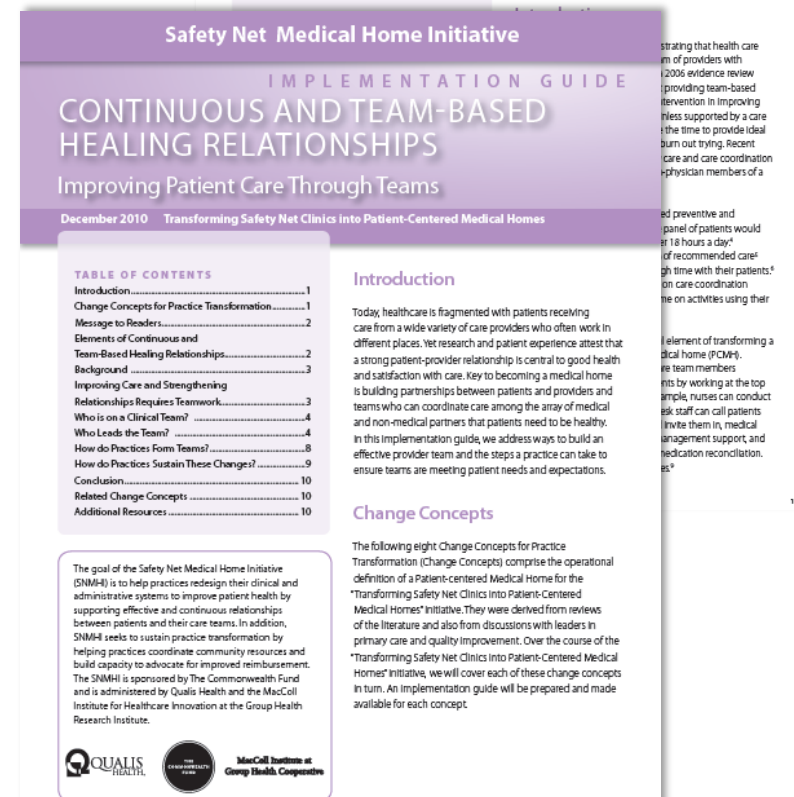
2 Implementation Guides

- Part 1: Improving Patient Care Through Teams
- Part 2: Elevating the Role of the Medical/Clinical Assistant: Maximizing Team-Based Care in the Patient-Centered Medical Home

3 Webinars

- Optimizing Your Care Team in the Medical Home
- Knowledge Building Session: How to Deploy Teams that Provide Continuous Team-Based Care
- Structured Communication Methods to Enhance Team-Based Care

Continually adding to a database of job descriptions



Available at: <http://www.safetynetmedicalhome.org/change-concepts>

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Neighborcare Health

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The Safety Net Medical Home Initiative Webinar: Optimizing the Role of the Front Desk Staff Thursday December 15, 2011

Presented by Neighborcare Health in Seattle Washington:

Katie Bell, Chief Operating Officer

Prathiba Pinnamaneni, Process Improvement Manager

Moderator:

Katie Coleman, MSPH, MacColl Center for Health Care Innovation
Group Health, Seattle, Washington

Key Objectives

We will describe how we have organized and optimized the role of the front desk staff. Discussion will include:

- The essential roles of front line staff (the hardest job in the clinic)
- How the work is organized and managed
- How other support staff play a key role in PCMH transformation
- Incorporating front line staff into the care team

Who is Neighborcare Health

- Neighborcare Health
 - 49,000 unique patients
 - 450 Staff
 - Medical, Dental, Midwifery, School Based Health, and Homeless Programs
 - 18 Sites in the city of Seattle
 - Our patients speak 50 different languages and dialects and our staff 20

RN redesign project

- Why redesign
 - Post EMR and flow was a problem
 - Solution was – send all incoming calls to RN
 - RN satisfaction was low, turnover was high
- Teams spun off
 - MA
 - Front Desk
 - Provider

Medical Clerk

- Mailing and faxing
- Initiate the paperwork flow
- Direct clerical support for back office
- Enter medication refills requests in EHR
- Call for outside records
- Did not add FTE, MA certification required going forward, we grandfathered some non-clinical folks at a couple of sites

Medical Assistants

- Responsible for overall flow of the back office
- Daily huddles with Providers
 - Prep for the day
 - Changes to schedule
- Help make sure schedules are full
- Panel Management

Front office key functions

- Check in
- Scheduling
- Phone answering
- Confirmation calls
- Verifying insurance
- Recalls

RNs

- Patient Education
- Chronic Disease Management
- Quality improvement
- Motivational Interviewing
- Team Huddles/Procedures

Tasking Guidelines

- What is a task
- Why this was important
- Redirect box

Tasking Guidelines

Front Desk Incoming Phone Call Tasking Guidelines

Rev 11/18/2011

Before tasking read scripts & document specific pt request. Detailed message, specific info, appropriate follow-up questions.

Call 911	*PAGE STAT*	RN TASK HIGH PRIORITY	TASK NORMAL	Medical Clerk	MA	Provider	Other Staff
<ul style="list-style-type: none"> Profuse bleeding Not breathing Seizure 	<p>URGENT/ CRITICAL LAB CALLS</p> <p>Hot List:</p> <p>(Pt on Phone or in clinic)</p> <ul style="list-style-type: none"> Allergic reaction Active Labor/water broke Loss of consciousness Chest Pain Fever in newborn less than 2 months old New numbness/ tingling in face or limbs Shortness of breath Suicide threat (page to BH or SW) Any available MH or SW to... {location} Trauma or question of broken bone "Worst headache of my life." 	<ul style="list-style-type: none"> Abnormal blood pressure Abnormal blood sugar Allergic reaction Change in level of consciousness High fever Plan B Severe abdominal pain 	<ul style="list-style-type: none"> Pt refuses appt, wants to speak to RN, Give Nurse Advice 800 number. Patient requesting health education/ advice Question about previous visit Nurse asked me to call Change in medication dose and patient refuses appointment 	<ul style="list-style-type: none"> Lost meds including narcotics Pt requests for copy of diagnostic results. I need a letter or paperwork - inquire about type of letter or paperwork and follow paperwork guidelines and make appointment accordingly. Pt requests med equipment, DME Lab results after 2 wks and no results received by patient. Request records from outside provider. After scheduling for F/ U from ER or in hospital or 1st Newborn visit Patient call for dx results, told by outside provider to call us, results not in yet. 	<ul style="list-style-type: none"> "Non-urgent provider call, TASK MA" Questions after receiving letter from PCP Patient is in front of you and needs imms record, get signed ROI and document in HIPAA tab. If patient calls to check on status of paperwork check in NG and if no information present task team MA Pharmacy calls re: pending Rx and patient is in front of them, page team. Change in med/dose make appt with Provider. Refill requests greater than 72 hrs after patient called pharmacy Non urgent RX, task the team. Patient insistent on getting lab and xray results. 	<ul style="list-style-type: none"> Pt requests Coumadin /Blood thinner test results, High Priority! Urgent call from provider (MD, PA-C, or ARNP) page PCP. If no one answers, page MA Refill narcotic Rx Pharmacy call re: same day Rx, page rendering provider. If no one answers, page MA I only want to talk to my provider Lab asking for diagnostic codes Visiting nurse call for orders and update 	<p>ROI</p> <ul style="list-style-type: none"> Records Request TB results copy Immunization Records (Urgent & non-urgent) Copy of diagnostic results Request for chart notes <p>Referral Coord</p> <ul style="list-style-type: none"> Existing Referral question Requesting New referral - schedule with PCP Renewal of referral <p>Social Worker</p> <ul style="list-style-type: none"> Financial or social hardship Suicide Threat (BH or SW) <p>Eligibility</p> <ul style="list-style-type: none"> Insurance qualifications or questions <p>Diabetes Group Community Health Educator</p> <ul style="list-style-type: none"> Diabetes Day, shoes, eye check

"I only wanna talk to my doctor"

Script: please give us as much information as possible so we can answer your question faster; provider requests at least 2 business days to return your call (depending on their schedule)

"I want my diagnostic test results"

Script: Our providers review test results daily. If your results are concerning, your provider will contact you as soon as possible. Radiology results take 5-7 business days but abnormal results are usually faster

"I want my lab test results"

Script: Our providers review test results daily. If your results are concerning, your provider will contact you as soon as possible. Otherwise, please allow 2 weeks to be informed of your test results. (See exception for INR results)

"I need a med refill"

Script: Call your pharmacy to request the refill. Please allow up to 72 hours for the med refill to be ready

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<div style="border: 2px solid blue; border-radius: 50%; padding: 20px; width: fit-content; margin: 0 auto;"> <h1 style="margin: 0;">Call 911</h1> </div>							
	<ul style="list-style-type: none"> • Shortness of breath • Suicide threat (page to BH or SW)" Any available MH or SW to... (location) • Trauma or question of broken bone • "Worst headache of my life." 						

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Guidelines

Outgoing Phone Call Tasking Guidelines

1/18/2011

For specific info, appropriate follow-up questions.

Call 911

- Profuse bleeding
- Not breathing
- Seizure

"I only wanna talk"
Script: please give us information as possible answer your question requests at least 2 weeks return your call (dep schedule)

Other Staff

- ROI**
- Records Request
 - TB results copy
 - Immunization Records (Urgent & non-urgent)
 - Copy of diagnostic results
 - Request for chart notes

- Referral Coord**
- Existing: Referral question
 - Requesting New referral - schedule with PCP
 - Renewal of referral

- Social Worker**
- Financial or social hardship
 - Suicide Threat (BH or SW)

- Eligibility**
- Insurance qualifications or questions

- Diabetes Group Community Health Educator**
- Diabetes Day, shoes, eye check

Staff

ROI

- Records Request
- TB results copy
- Immunization Records (Urgent & non-urgent)
- Copy of diagnostic results
- Request for chart notes

Referral Coord

- Existing: Referral question
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Tasking Guidelines

- Annual review
- Development curriculum/training
 - Ask patient multiple questions
 - Send enough details on the task to not create rework
 - Training by RN's for recognizing important conditions

Paperwork Guidelines

- Why have them
- How paper enters the system, who does what, limit provider time
- What are some key elements
 - DME
 - Disability
 - School and work excuses
 - Letters, letters, letters – jury, electricity cut off, metro, etc
 - Records in and out

Measuring success at front desk

- TOS collections
- Income/bad address
- Denials
- No-shows
- Redirects
- We long for phone measures!

Link to PCMH

- Coordination of care
- Care transitions
- Referral management
- Information flows to the right place within the team

Integration into clinical teams

- When it works
 - Link to diabetes
 - Keeping schedules full
 - Part of the daily huddle
- When it doesn't work
 - Not my job
 - No real ownership of the panel

Questions?

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