Practice Workflow Toolkit

Background

- HEALTHeLINK designed and implemented a pilot study with three primary care and three specialty care practices to examine whether the integration of Health Information Exchange (HIE) services into practice office workflow would have an impact on quality of care, practice expense and revenue, as well as patient and staff satisfaction.

- During the study, a group of health IT professionals and clinical specialists trained the staff on how to appropriately use and efficiently integrate HIE services in their workflow. Prior to the pilot these practices had little or no utilization of HEALTHeLINK or had not integrated the use of the HIE into their practice workflow.

- It's important to mention that Pre- and Post-pilot surveys were also conducted which confirmed the value of integrating HEALTHeLINK into practice workflows. The survey responses confirmed that:
    - Timely access to clinical data was valued by physicians and providers
    - Managers in the practice were pleased that using HEALTHeLINK allowed them to resolve atypical patient situations
    - Nurses and medical assistants indicated that HEALTHeLINK made their jobs easier because they spend less time tracking down clinical data, plus useful clinical data is readily available
    - Nonclinical staff also reported that HEALTHeLINK made their jobs easier.

Agenda

1. Practice Workflow Toolkit Features
2. Practice Workflow Recommendations and ROI
3. Practice Use Cases for HEALTHeLINK
4. Pre-Visit Planning for New Patients (adult/child)
5. Next Steps

- A goal of the pilot was to develop a set of tools and processes to improve efficiencies with a practice utilizing HEALTHeLINK as a critical component of practice workflows. We'll take a closer look at three of these tools today.

Practice Workflow Toolkit Features

The toolkit:

1. Provides a systematic method to assess practice workflow relative to obtaining patient information.
2. Allows the practice to easily identify applicable use cases for HEALTHeLINK.
3. Includes checklist "templates" to standardize pre-visit planning by visit type or disease state.
4. Provides information about HEALTHeLINK services and workflow recommendations designed to improve efficiency and clinical quality, decrease expense and enhance patient/staff satisfaction.

- This slide highlights the features and capabilities of the Practice Workflow Toolkit.
- The toolkit was designed to give practices the flexibility to implement the use cases that make the most sense for their practice's workflow to help streamline tasks and increase overall efficiency.

Practice Workflow Toolkit Features

Samples of the toolkit documents include:

1. Practice Workflow Toolkit Introduction and Instructions
2. Practice Assessment Tool
3. Practice Workflow Recommendations & ROI*
4. Practice Use Cases for HEALTHeLINK*
5. Practice Chart Prep Worksheets*
6. Use Case Workflow Measurement Tool & Summary
7. Patient Cycle Time Calculation Tool & Summary
8. HEALTHeLINK Consent Management Application (CMA)
9. Team Huddle Checklist

*Samples of these tools are included in this presentation – see slides 5-7.

- The toolkit is a collection of documents that can assist with various processes associated with a typical medical practice workflow.
- Two key workflow tools to get a practice started are:
    - "Practice Workflow Recommendations and ROI"
    - "Practice Use Cases for HEALTHeLINK"

Practice Workflow Recommendations and ROI

	Pain Point or Problem to be Solved	Recommendation	Impact and Return on Investment					
			Practice Expenses	Practice Revenue	Clinical Quality	Patient Satisfaction	Staff Satisfaction	Payers
1	a) Team members assigned to obtaining patient information are unable to complete tasks in an accurate and timely manner. b) Pre-Visit planning is not being completed for specified use case(s). c) Front desk staff who answer the phones and do pre-visit planning are multi-tasking, increasing the probability of errors and omissions. d) Care team members experience delays during the patient visit due to lack of necessary information.	Provide select team members with dedicated time each day away from the phones to focus on pre-visit planning/other duties.	Potential increase in efficiency and ability to re-purpose staff or add additional duties as a result of the decrease in re-work/duplication of efforts due to poor communication.	Having access to a complete medical record may result in less interruptions during the patient encounter and a shorter visit potentially opening up the schedule for additional patients. Potential increase in revenue due to improved quality scores, PCMH accreditation, etc.	Having access to a complete patient record will improve the quality of the visit and allow for better medical decision making.	Patients will have a sense that the clinical team is well prepared to address their needs.	Less frustration and potential stress for all staff and providers.	Opportunity for staff to identify and address gaps in care, which will result in improved quality metrics.
2	a) Staff and providers spend too much time searching for patient records from multiple sources. b) Providers are frustrated because they do not have the information they need to care for their patients. c) At times, patient tests need to be repeated due to lack of initial test results.	Add HEALTHeLINK Service: Results Delivery- Receive medical record results for patients from any other linked source.	Potential increase in efficiency and ability to re-purpose staff or add additional duties as a result of the decrease in re-work/duplication of efforts due to poor communication.	A reduction in PMPM costs may improve health plan reimbursement (value-based payments).	Having access to a complete patient record will improve the quality of the visit and allow for better medical decision making.	Patients will not have to repeat tests which impacts their time and health care costs. Patients will have a sense that the clinical team is well prepared to address their needs.	Less frustration and potential stress for all staff and providers.	Decrease in duplication of testing with resultant decrease in medical expense.
3	a) No notification when a patient is seen in the ED, admitted to or discharged from a hospital. b) Practice's hospital re-admission rates are higher than peers.	Add HEALTHeLINK Service: Alert Notifications (AN)- Receive immediate notifications on care transitions for patients you wish to track.	Automatically receiving alerts may result in a potential decrease of "x" hours/month spent manually searching multiple systems for patient information.	Potential increase in quality payments due to decreased re-admission rates. Potential revenue from Transition of Care payments.	Potential decrease in patient re-admission rate secondary to improved follow-up.	Patient avoids a re-admission and can be cared for safely at home.	Less frustration and potential stress for all staff and providers.	Potential to improve health plan rankings (Medicare/Medicaid). Potential decrease in medical expense.

- The intent of the "Practice Workflow Recommendations and ROI" tool is to capture the recurring themes or pain points practice leadership and team members said they experienced related to obtaining clinical information on a patient.
- For each pain point (or problem), a Recommendation is provided along with a breakdown on the Impact and Return on Investment (ROI) that can be realized if the practice implemented a particular recommendation.
    - The Impact and ROI are summarized in the following categories: Practices Expenses, Practice Revenue, Clinical Quality, Patient Satisfaction, Staff Satisfaction and Payers.

Practice Use Cases for HEALTHeLINK

Adjusting Practice workflow to incorporate the use of HEALTHeLINK for all applicable use cases is a proactive approach to care that ensures each visit is meaningful and well organized. Anticipating the tasks necessary to support the patient visit and proactively completing them in advance decreases disruptions in patient flow and promotes streamlined, coordinated care.

	Use Case	Definition	Applicability			
			Primary Care	Specialty Care	Pediatrics	OB/GYN
1	Pre-Visit Planning for New Patients (adult/child)	Process to obtain all the pertinent patient past medical history and information necessary to conduct the initial new patient visit. This could include labs, radiology reports, results of preventive screenings, medication history, procedures, etc.	X	X	X	X
2	Pre-Visit Planning for Existing Patients with Acute Problems	Process to obtain patient information that is relative to the recent/new problem or complaint.	X	X	X	X
3	Pre-Visit Planning for Wellness Visits	Process to obtain patient information that is necessary to conduct a wellness visit. This could include pre-visit labs that were ordered, results of preventive services such as colonoscopy or mammography, etc.	X		X	X
4	Pre-Visit Planning for Follow-Up Visits	Process to obtain patient information that is necessary to conduct a follow-up visit for patients with chronic diseases such as diabetes or asthma or follow-up after a visit for an acute problem. This could include labs or results of tests that were ordered, clinical consults from other physicians, etc.	X	X	X	X
5	Obtaining Information During the Patient Visit	This situation could occur if no pre-visit planning is done or the patient indicates during the visit that there was testing or encounters with other physicians since their last visit.	X	X	X	X
6	Providing Information to Others Outside of the Practice (including patients/family members)	Process to obtain patient information that is requested by third parties such as insurer's, families, other practices.	X	X	X	X
7	Post-Discharge Follow-Up After an ED Visit or Inpatient Admission	Practice has HEALTHeLINK alert notifications in place and are notified of these types of encounters. Process to obtain patient information relative to the type of encounter and necessary to determine next steps for care of the patient.	X	X	X	X
8	Medical Clearances for Surgery	Process to verify the completion of pre-operative testing.	X	X	X	X
9	Obtaining Information for Quality Management (P4P, PCMH, MACRA)	Process to obtain select patient information such as preventive services, or related to management of a chronic condition such as diabetes, etc.	X	X	X	X
10	Obtaining Information to Support Referrals/Prior Authorization	Process to obtain select patient information such as medications, lab results, radiology reports, etc. to meet referral and/or prior authorization requirements.	X	X	X	X

- The "Practice Use Cases for HEALTHeLINK" describes the unique situations or ***use cases*** a medical practice encounters prior to, during or subsequent to a patient visit or patient event that requires the sharing or collecting of specific types of information regarding a patient and their health.
  - The definition of each use case is provided along with its applicability to Primary Care, Specialty Care, Pediatrics or OB/GYN practices.

- The Primary and Specialty Care practices, who consistently use HEALTHeLINK, have instituted specific workflows to address pre-visit planning (i.e., chart prep), onboarding new patients, managing patients between visits and using services such as alert notifications. As a result, many of these practices have seen an increase in practice efficiency, a reduction in some practice expenses, improvement in the quality of the patient visit and higher staff and patient satisfaction.

Practice Use Cases for HEALTHeLINK -
Pre-Visit Planning for New Patients (adult/child)

Practice Chart Prep Worksheet

Use Case: Pre-Visit Planning for New Patients (Adult/Child)

	Action	Comments
A.	Verify Patient Consent	
o	Check consent status in HEALTHeLINK's Consent Management Application (CMA) tool.	
o	If Consent value is 'Unknown' or 'No', print a Patient Consent form from the CMA tool and add to their new patient packet and/or the patient's folder to review/update consent at their initial office visit.	
B.	Confirm Primary Care Doctor (PCP) and Verify Eligibility/Benefits/Copayments	
o	If PCP office, confirm PCP assignment in HEALTHeNET.	
o	Verify eligibility, benefits and copayment in HEALTHeNET/other.	
C.	Check for Relevant and/or Recent Medical Records and Scan/Push to the Patient's Medical Record: 1. From patient's medical record 2. From HEALTHeLINK 3. From Soarian, InfoClique 4. From other source via outbound call, fax or mail 5. If Medical Records are not available, note in chart or tickler file to assure follow-through	
o	Lab Results	
o	EKGs	
o	Radiology Reports/Images	
o	ED Encounter Reports	
o	Inpatient Discharge Summaries	
o	Females: Mammogram, Pap Smear & Bone Density Report	
o	Results of Colonoscopy/Fecal Occult Blood	
o	Other Transcribed Reports	
o	Results of Other Tests/ Procedures	
D.	Prepare Relevant Patient Release Forms and Other Documents *These forms may be mailed to the patient in advance or completed online so they are available at the time of the visit.	
o	Patient Registration Form*	
o	Health History Questionnaire*	
o	HEALTHeLINK Patient Consent Form	
o	HIPAA Privacy Form*	
o	Current Medication List*	
o	Vaccine History*	
o	Medical Release Form*	
o	List of Specialists	
o	Patient Portal Information	
o	Other	

- "Practice Chart Prep Worksheets" provide a step-by-step checklist for practices to follow for a particular use case. There is a worksheet for each of the defined use cases (on the previous slide).
- This slide is an example of a pre-visit planning checklist for a new patient (whether it's an adult or a child); it includes the following key steps:
  - Verify Patient Consent
  - Confirm Primary Care Doctor (PCP) and Verify Eligibility/Benefits/Copayments
  - Check for Relevant and/or Recent Medical Records and Scan/Push to the Patient's Medical Record
  - Prepare Relevant Patient Release Forms and Other Documents.

Next Steps

If you have questions or would like to schedule a time to review the Practice Workflow tools in person, please contact the HEALTHeLINK Account Management department at AccountManagers2@wnyhealthelink.com.