CCALAC Care Team Webinar

The Art of Preparation

January 27th & 29th, 2021

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COMMUNITY CLINIC ASSOCIATION OF LOS ANGELES COUNTY

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Your Trainers:

Harpreet Sanghera
Sacramento, CA

Project Manager, Process Redesigner & Trainer. Sacramento, CA. Harpreet truly enjoys the California sunshine, which is why she was born, raised, and hasn't left the state. She was a Clinic Manager at a Federally Qualified Health Center (FQHC) right outside Sacramento, CA. She started as the front office lead, worked as a Medical Assistant and Flow Coordinator. Harpreet also worked on her Quality Improvement team at her health center, and she is a graduate of the Clinic Leadership Institute (CLI) Program. Before becoming a process redesigner, she went through a Rapid DPI™ at her health center when she excelled and learned how to manage change and become a coach herself. With Coleman, Harpreet manages Rapid DPI™ projects, DPI™ collaboratives, leads the High Impact Management Program, leads many phone room redesign projects, and was a key Coach aka Passion Ignitor in redesigning immigration and naturalization services.

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Your Trainers:

Brizzia Burgos
Longmont, CO

Logistical Team Coordinator and Vroom! Administrator. Longmont, CO. Brizzia has been a mainstay in the Coleman family for over six years, leading the development and streamlining of our materials and production. Brizzia serves as the Coleman direct client support and administrator of Vroom! our online training platform (www.Vroom.Training). Brizzia is in charge of materials design, duplication, and shipping for all learning sessions which is a fancy way of saying that she has to catch all of the crazy requests and ideas flowing from her colleagues and turn them into tangible tools and get them where they need to go. She also handles all website updates, data reviews, webinar coordination, including all translation coordination for our Spanish language website. Brizzia provides direct support to the CEO and provides overall backup to the Associates.

Learning Objectives

PARTICIPANTS WILL APPLY THE LEARNED INFORMATION TO THEIR OWN VISIT PREP PROCESSES

PARTICIPANTS WILL APPLY THE LEARNED INFORMATION TO THEIR OWN FINANCIAL PREP PROCESS

PARTICIPANTS WILL ADAPT PRE-REGISTRATION BEST PRACTICES TO THEIR HEALTH CENTER FLOW

Today

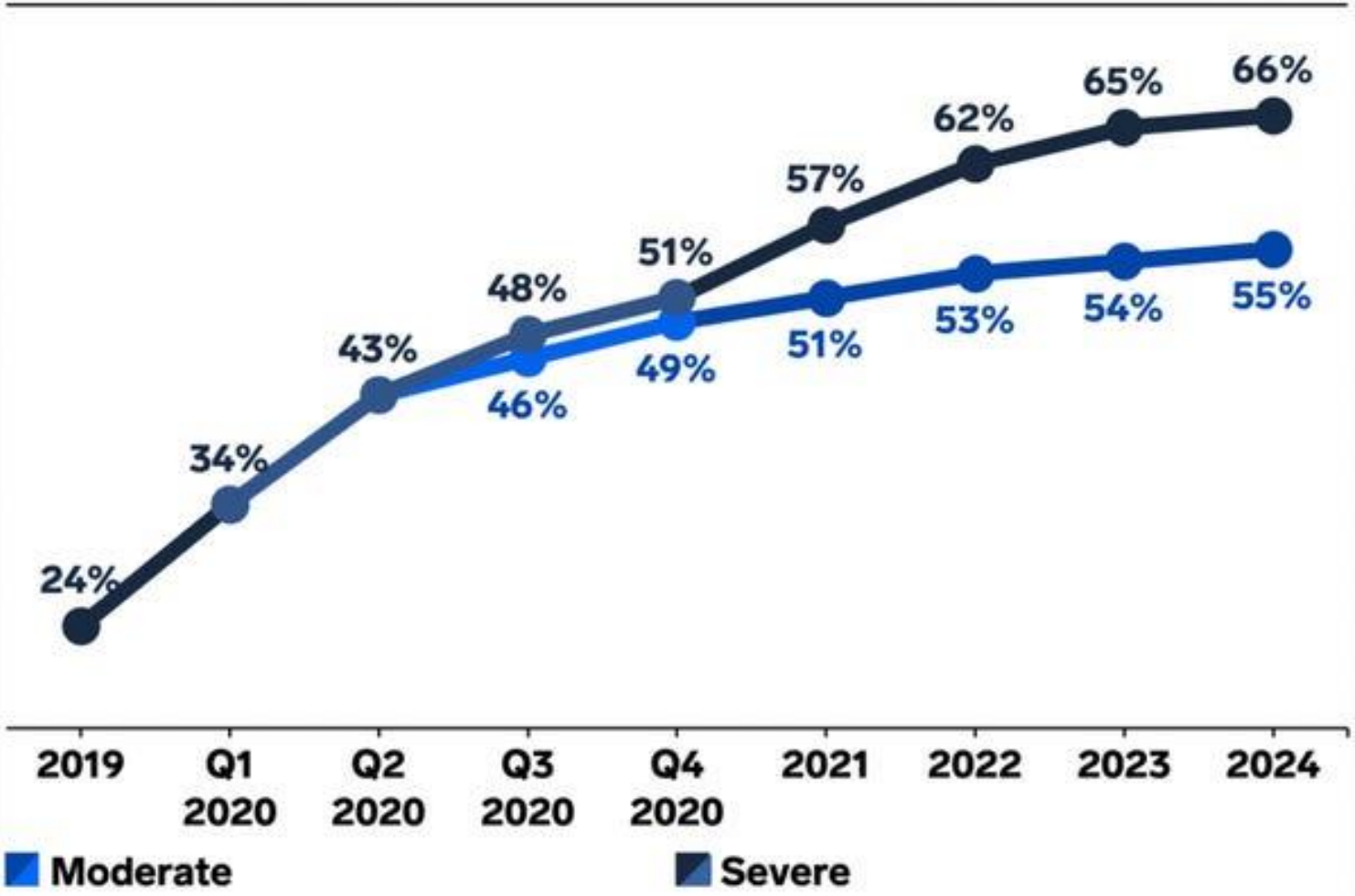
Preparing for a New Normal Considerations:

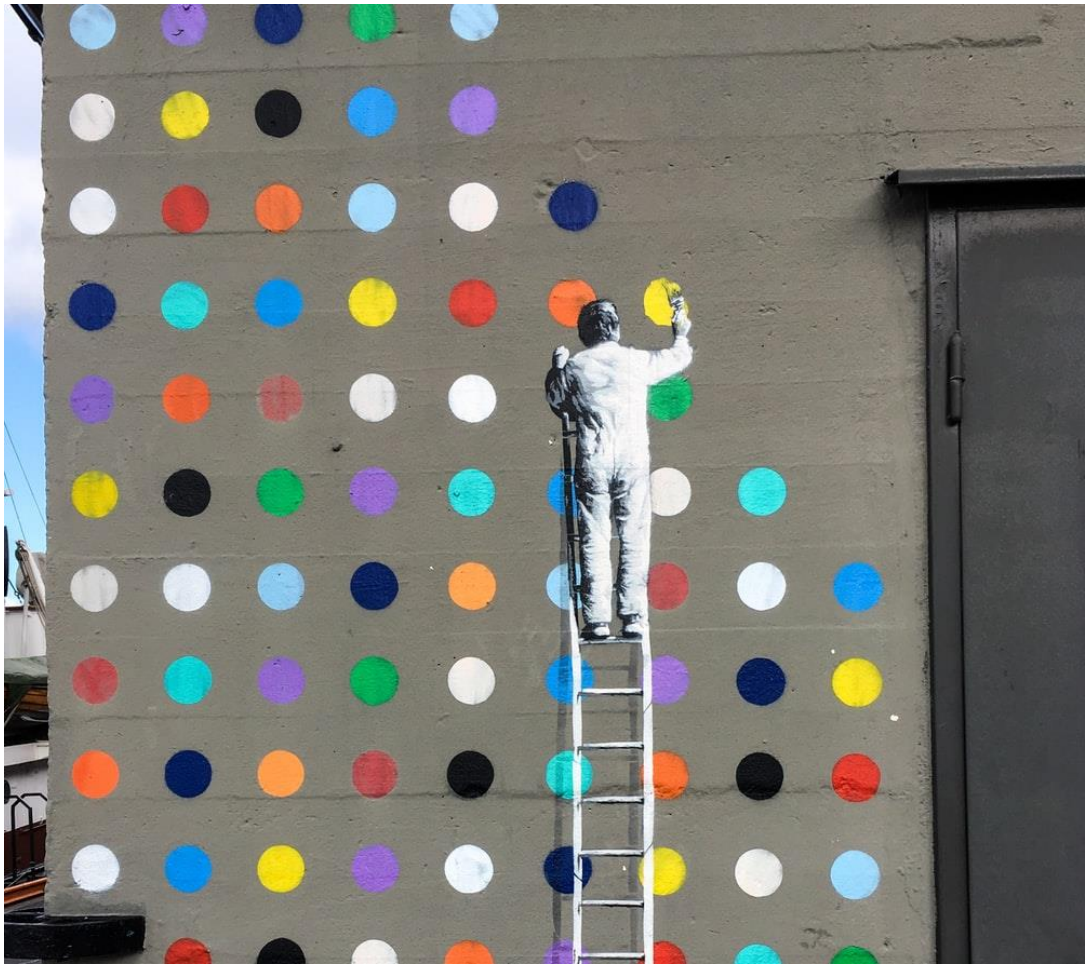
- Well-coordinated execution
- Protective and reassuring for patients and staff
- Able to meet the needs of your communities

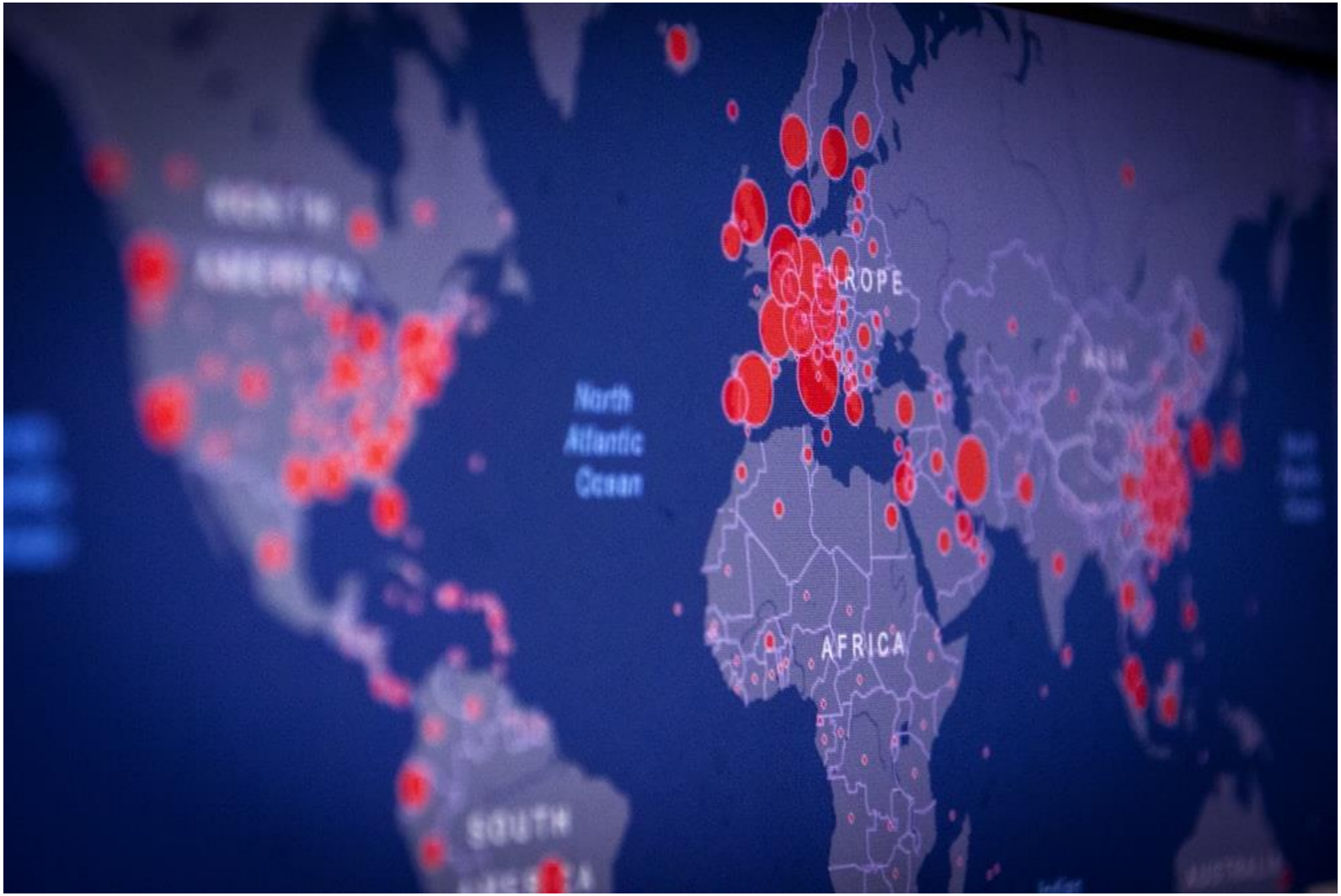
Today's Takeaways

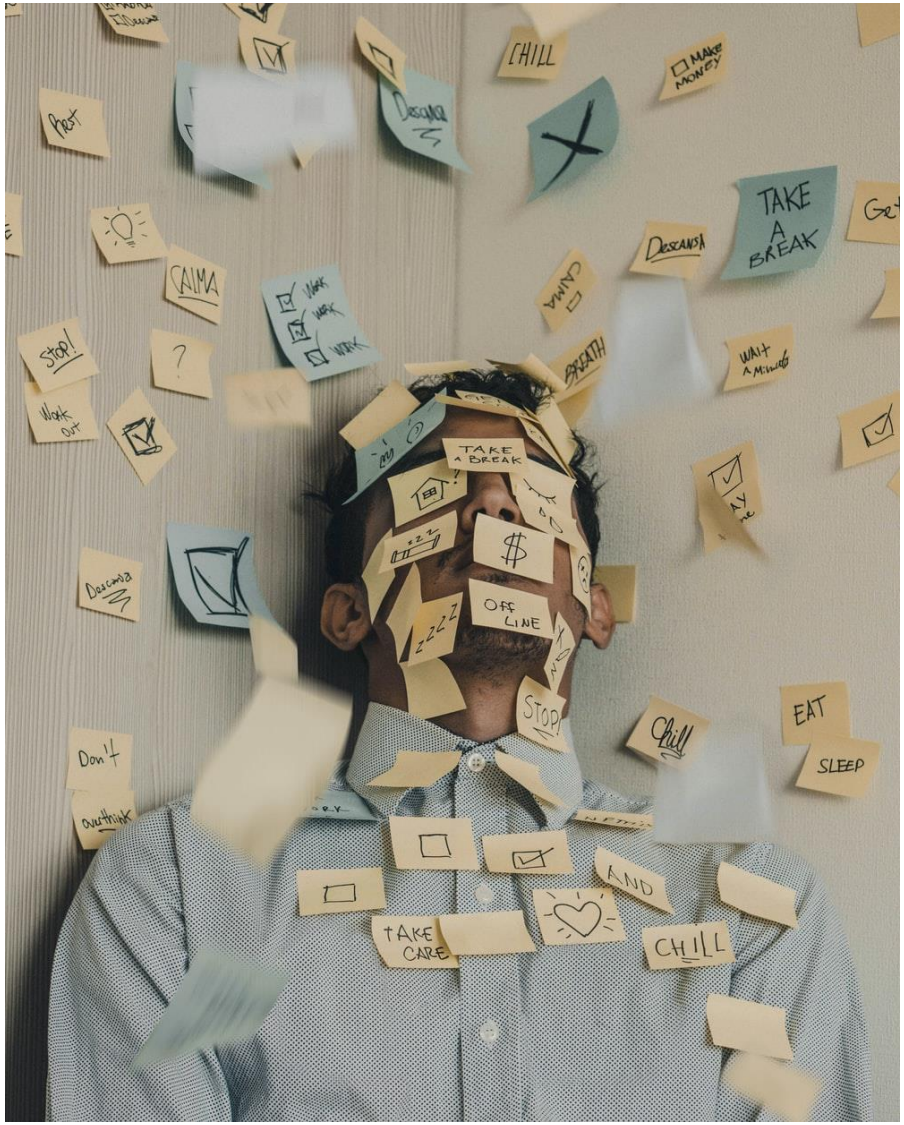
- How to Reimagine the Needs of Patients in the 'New Normal'
- The Art of Robust Visit Preparation
- The Art of Financial Preparation
- Registration Prep (Over the Phone)

US Online Grocery Penetration Forecast









Caring for a panel of 2,500 patients requires an average of

22.6

hours per day.

NOTICE

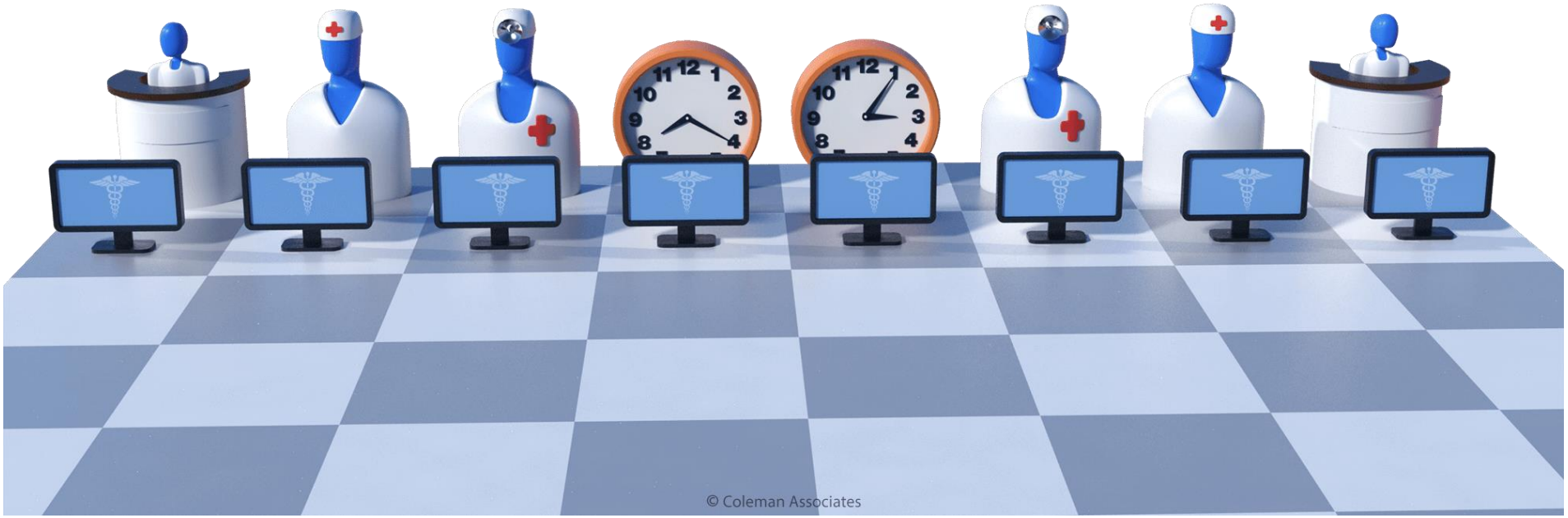
TEAMWORK REQUIRED

Today's Takeaways

- How to Reimagine the Needs of Patients in the 'New Normal'
- The Art of Robust Visit Preparation
- The Art of Financial Preparation
- Registration Prep (Over the Phone)

Looking at the day as an upcoming chess match

instead of a game of chance like poker will yield a different outcome for team members and patients. Instead of letting the cards be dealt at random, what if staff positioned themselves systematically for their visits?



Clinical Preparation for the Visit:

1 – 2 Days Before Visit

- The Goal = Reduce Patient Cycle Time
- High Cycle Times
  - Patients are in the health center for a long period of time
  - Increase patient and staff exposure
  - Low patient satisfaction

Sample Visit Prep Checklist

- Identify the reason for visit (If the reason for visit isn't clear, call the patient and clarify the reason)
- Is this a telehealth or in-person visit?
  - Does the visit need to be changed?
- Has this person done a Telehealth visit before?
- Can this provider provide this type of visit?
- Is this the right time for the visit? For example, if the visit is a Well Child, is the Well Child due. Or if the visit is for a 3-month Diabetes Follow-up, has it been three months?
- If the visit is to follow up on labs or referrals, have those been completed?

Sample Visit Prep Checklist

- Look up the last visit note and any follow-up plans
- Check to see if the patient has any tests for or history of COVID-19.
  - If recent positive test, should they be coming in for the visit (if in-person)?
- Check if there are any outstanding phone notes, tasks, patient portal messages, referrals or labs.
- Check for any quality metrics that are due such as depression screenings or vaccines.
- For diabetes visit, check last A1C and foot exam.
- For hypertension visit, check last BP.
- For well child visits, make sure you have vaccine records and send the parents any screenings that are due in advance (MCHAT, ASQ, etc.)
- For OB visits, confirm # weeks and any quality metrics due.

Visit Prep Checklist:

1. Is each appointment wanted or needed?
2. Is all of the information in the record up to date?
3. What other needs do we have for the patients or can be anticipated that the patient will have for us?
4. Make the updates and prepare for the confirmation call.

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Date	Time	Patient	Reason for Visit	Notes
Tues	8:15 am Telehealth	Lylah A. 71 YO F	Hospital F/U	
Tues	8:30 am In-Person	Komal N. 45 YO M	Back Pain	
Tues	8:45 am In-Person	Yasmeen M. 27 YO F	Pap Smear	
Tues	9:00 am Telehealth	Devin C. 64 YO M	Hypertension	

Tues	8:15 am Telehealth	Lylah A. 71 YO F	Hospital F/U

- Reason for Visit — Hospital Follow-Up from 1/6/21 COVID-19
- Last Visit Notes — Seen 9/13 for DM (A1C 7.4), Seen 1/20/20 for first follow-up. Receiving home care since discharge.
- COVID-19 History — See hospital visit notes.
- Outstanding phone notes, tasks, messages, referrals, or labs. — Requested med refills 4 days ago.
- Quality measures — Due for colon cancer screening.

Date	Time	Patient	Reason for Visit	Notes
Tues	8:15 am Telehealth	Lylah A. 71 YO F	Hospital F/U	9/13/20 Visit for DM. Hospitalized 1/6/21 with COVID-19. In-Person Follow-up 1/20/20. A1C 7.4. Receiving home care. Med refill request 4 days ago. Needs colonoscopy.
Tues	8:30 am In-Person	Komal N. 45 YO M	Back Pain	
Tues	8:45 am In-Person	Yasmeen M. 27 YO F	Pap Smear	
Tues	9:00 am Telehealth	Devin C. 64 YO M	Hypertension	

Tues	8:30 am In-Person	Komal N. 45 YO M	Back Pain

- Reason for Visit — Back Pain
- Last Visit Notes — Last seen 2 weeks ago via telehealth for back pain.
- COVID-19 History — None.
- Outstanding phone notes, tasks, messages, referrals, or labs. — Outstanding referral for PT for back pain. Needs med refills.
- Quality measures — Last PHQ9-12. See BH when he's here. Repeat PHQ-9.

Date	Time	Patient	Reason for Visit	Notes
Tues	8:15 am Telehealth	Lylah A. 71 YO F	Hospital F/U	1/13/20 Visit for DM. Hospitalized 4/6/20 with COVID-19. In-Person Follow-up 4/20/20. A1C 7.4. Receiving home care. Med refill request 4 days ago. Needs colonoscopy.
Tues	8:30 am In-Person	Komal N. 45 YO M	Back Pain	Last seen 2 weeks ago via telehealth. Outstanding referral for PT. Needs med refills. Repeat PHQ9. Last PHQ9 12. BH needed.
Tues	8:45 am In-Person	Yasmeen M. 27 YO F	Pap Smear	
Tues	9:00 am Telehealth	Devin C. 64 YO M	Hypertension	

Tues	8:45 am In-Person	Yasmeen M. 27 YO F	Pap Smear

- Reason for Visit — Pap Smear-but according to provider plan should be Colpo. Called patient to confirm. Also wants to talk about Birth Control.
- Last Visit Notes — Seen in December for Pap. Pap was abnormal.
- COVID-19 History — None
- Outstanding phone notes, tasks, messages, referrals, or labs. — N/A
- Quality measures — Needs TDAP

Date	Time	Patient	Reason for Visit	Notes
Tues	8:15 am Telehealth	Lylah A. 71 YO F	Hospital F/U	1/13/20 Visit for DM. Hospitalized 4/6/20 with COVID-19. In-Person Follow-up 4/20/20. A1C 7.4. Receiving home care. Med refill request 4 days ago. Needs colonoscopy.
Tues	8:30 am In-Person	Komal N. 45 YO M	Back Pain	Last seen 2 weeks ago via telehealth. Outstanding referral for PT. Needs med refills. Repeat PHQ9. Last PHQ9 12. BH needed.
Tues	8:45 am In-Person	Yasmeen M. 27 YO F	Colpo	Had a abnormal pap in December. Needs colpo. Called patient to confirm. Update TDAP and wants to discuss Birth Control.
Tues	9:00 am Telehealth	Devin C. 64 YO M	Hypertension	

Tues	9:00 am Telehealth	Devin C. 64 YO M	Hypertension

- Reason for Visit HTN Follow-UP
- Last Visit Notes Seen 10/3/20 for HTN.
- COVID-19 History None
- Outstanding phone notes, tasks, messages, referrals, or labs.

  Needs med refills. Outstanding referral for Dermatology for mole on right shoulder. Derm appointment schedule in October.
- Quality measures

  Blood pressure. Has BP cuff at home for telehealth visit.

Sample Process

[Insert Logo]

Visit Prep

Purpose:

Visit Prep makes sure that staff and providers are ready for patient visits.

Process:

- The philosophy of Visit Prep is that there is a set amount of work that needs to be completed for an individual patient visit. This work can be completed before the patient's visit or while the patient is waiting. The value of Visit prep is that the work for the patient is completed in a way that doesn't keep the patient waiting and that maximizes opportunities for strategic care.
- Visit Prep is completed at least [insert # of days] day(s) in advance of scheduled patient visits
- Visit Prep is completed same-day for patients that schedule same-day visits
- Whenever possible, Visit Prep should be completed when follow-up appointments are scheduled
- Visit Prep is generally completed by [insert staff member title]
- Begin by opening the patient schedule. For every patient, complete the following checklist. The results of Visit Prep for each patient is documented [insert location in the EMR where Visit Prep should be documented].
    - Identify the reason for visit (If the reason for visit isn't clear, call the patient and clarify the reason)
        - Can this provider provide this type of visit? (If not, reschedule)
        - Is this the right time for the visit? For example, if the visit is a Well Child, is the Well Child due. Or if the visit is for a 3 month Diabetes Follow-up, has it been three months?
        - If the visit is to follow up on labs or referrals, have those been completed?
    - Look up the last visit note and any follow-up plans
    - Check to see if the patient has any tests for or history of COVID-19.
    - Check if there are any outstanding phone notes, tasks, patient portal messages, referrals or labs.
    - Check for any quality metrics that are due such as depression screenings or vaccines.
    - For diabetes visit, check last A1C and foot exam.
    - For hypertension visit, check last BP.
    - For well child visits, make sure you have vaccine records and send the parents any screenings that are due in advance (MCHAT, ASQ, etc.)
    - For OB visits, confirm # weeks and any quality metrics due.
- If the [insert staff member role] is unable to complete their Visit Prep on time, they are responsible for notifying [insert staff member role] by [insert time and number of days

Management Process

Patient Care Team	Financial Prep		Visit Prep		Confirmation Calls	
	Yes	No	Yes	No	Yes	No
	Yes	No	Yes	No	Yes	No
	Yes	No	Yes	No	Yes	No
	Yes	No	Yes	No	Yes	No
	Yes	No	Yes	No	Yes	No
	Yes	No	Yes	No	Yes	No

Today's Takeaways

- How to Reimagine the Needs of Patients in the 'New Normal'
- The Art of Robust Visit Preparation
- The Art of Financial Preparation
- Registration Prep (Over the Phone)

Financial Preparatory Work:

Occurs 1 or More Days Before Visit

Eligibility status determined

Payment required is determined

Communication with patients about outstanding needs

Eligibility Status

Confirmation

Reason for visit and timeline?
- is the Annual or well exam payable today?)

Does the patient have coverage for the visit?

What program is the patient on?

Confirm eligibility online
- Internet
- Insurance
- State program
- Managed Care Member

Eligibility Status

Assistance

If the patient
has no coverage:

- Contact by phone
- Confirm reason for visit
- Determine program patient is eligible for
- Fill out application for patient

Next steps :
Signature needed?
Proof of income?

Eligibility Status

Accuracy

Make sure the information in system is accurate.

If it's not, you won't get paid or it will be delayed.

Check name, address, ID number, and type of coverage for visit type.

Check if the patient is assigned to you as PCP.

Do it right the first time!!

Payment Expected: *Preparing the Patient & Staff*

Determine and document payment due from patient:
Co-pay
Deductible
Share of cost
Past due balances
Flat fee

Note in computer system
– spell out clearly what is owed by patient.

Staff understand what patient owes and how to ask for payment.

In-Person Payment Options

- Mail the invoice to the patient
- Have the patient come by the health center to pay from the parking lot
  - Schedule this in advance for telehealth or telephone visits
- Look into reduced handoff options
  - The Square
  - Tap to pay

Payment Options for Virtual Visits

- Collect payment over the phone via credit card during the pre-registration process
- Look into options to have patients pay online through the Patient Portal or the organization's website

Online Patient Payment Portal

Patients can easily pay their bill online in seconds!

Click here to find out more

Partner with Your Billing Department

- Transfer the patient to the billing department after the front desk or MA is done with the registration over the phone
- Have the billing department reach out to the patient and collect payment over the phone

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Seize the Opportunity!

KAISER PERMANENTE®

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Pre-Registration Goals

- Occurs the day before the visit
- Opportunity for staff to plan and confirm details with the patient
  - Anticipate needs
  - Adjust/update demographics and payor information
- Reduces the Cycle Time = less time the patient spends in the health center

Telephone or Telehealth Visits: Confirm Details

- When speaking with the patient:
  - Confirm the appointment to ensure the day and time still works for them.
  - Confirm demographics and reason for visit.
  - Use the COVID-19 patient screening tool.

Telephone or Telehealth Visits: Assist with Technology

- Based on your organization's policy, give them the window of time they should expect the call
  - Confirm patient phone number, confirm email or text number to send video instructions.
  - Verify the patient can join via video or telephone.
  - Explain the appointment process and if it is a video visit, ask to test the web conferencing platform. This helps to prevent any delays during the visit with the provider.
- Ask them if they are enrolled in the Patient Portal. If not, give patient information for portal sign up or sign them up over the phone.

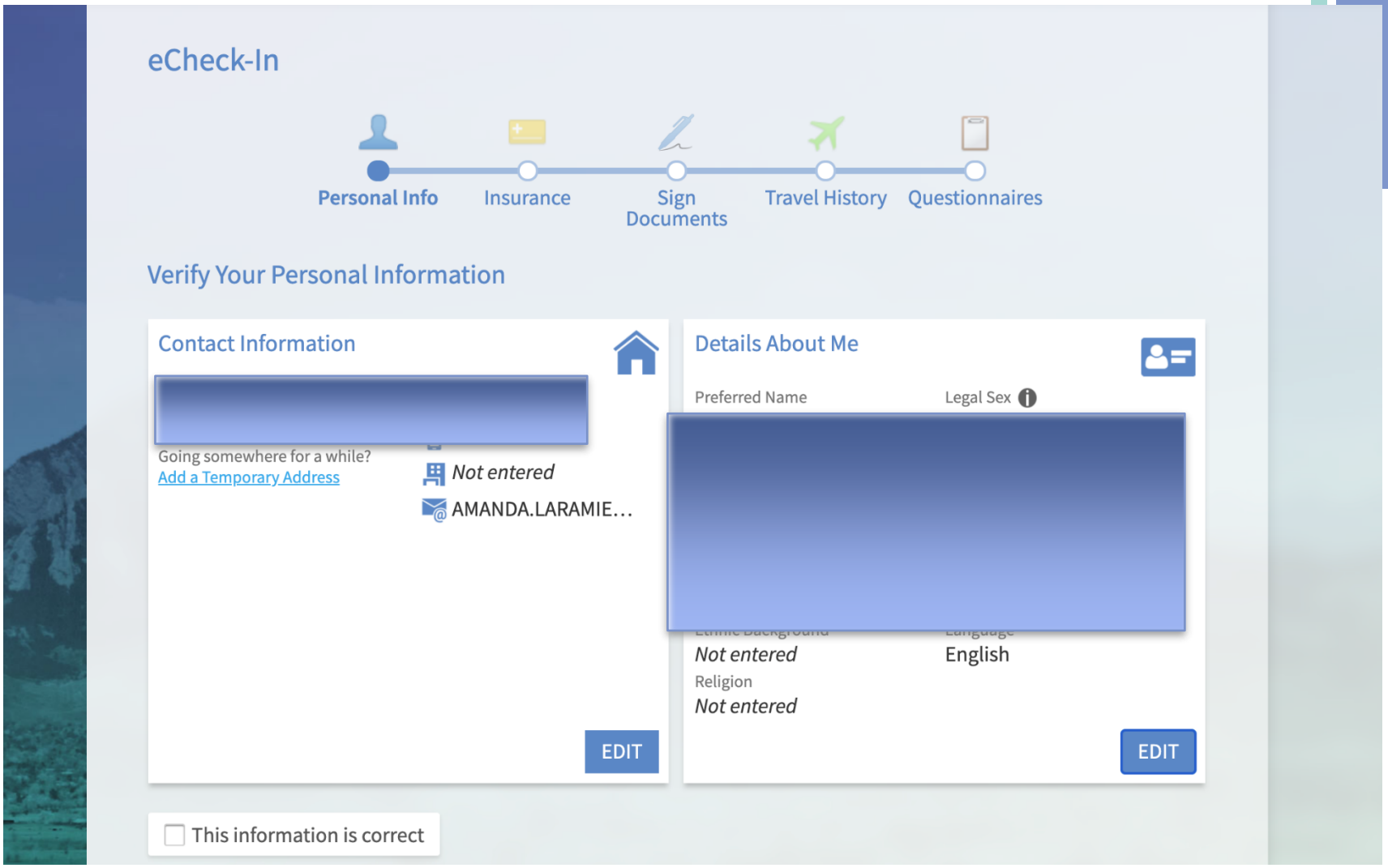
Telephone or Telehealth Visits: Financial Prep

- Verify their insurance and inform them of any copays or past balance.
- Have patient send you pictures of:
  - ID
  - Insurance Card

- Based on your organization's policy either collect payment/credit card information in advance or make a note to have the MA collect it the day of the visit.

Telephone or Telehealth Visits: Update Forms

- For forms that need to be updated, some options are:
  - If possible, send the forms to the patient via email or a link through your Patient Portal/website
  - Have the patient send you images of completed forms
    - Follow your organization's policy regarding PHI and encryption of sensitive documents
  - Mail forms to the patient with a return envelope
  - Ask the patient if they can stop by the health center to fill out forms from their car or the parking lot



In-Office Visit: Explain the New Process

- Review the organization's process for in-office visits with the patient.
  - What can they expect when they arrive?
  - What will they be asked to wear?
  - What does social distancing look like?
  - Will they be asked to wait in the car?
  - What happens if they have a fever?

In-Office Visit: Update Forms

- For forms that need to be updated:
  - Follow your organization's policy for required forms.
  - Pen Etiquette: will you ask patients to bring their own pen or will you clean pens after every use?
    - Same for clipboards? Will you still offer clipboards?
  - Some health centers have patients fill out forms in the parking lot instead of the waiting room before being taken to an exam room.

Clean vs. Dirty Pens

The "Fast Track" Lane

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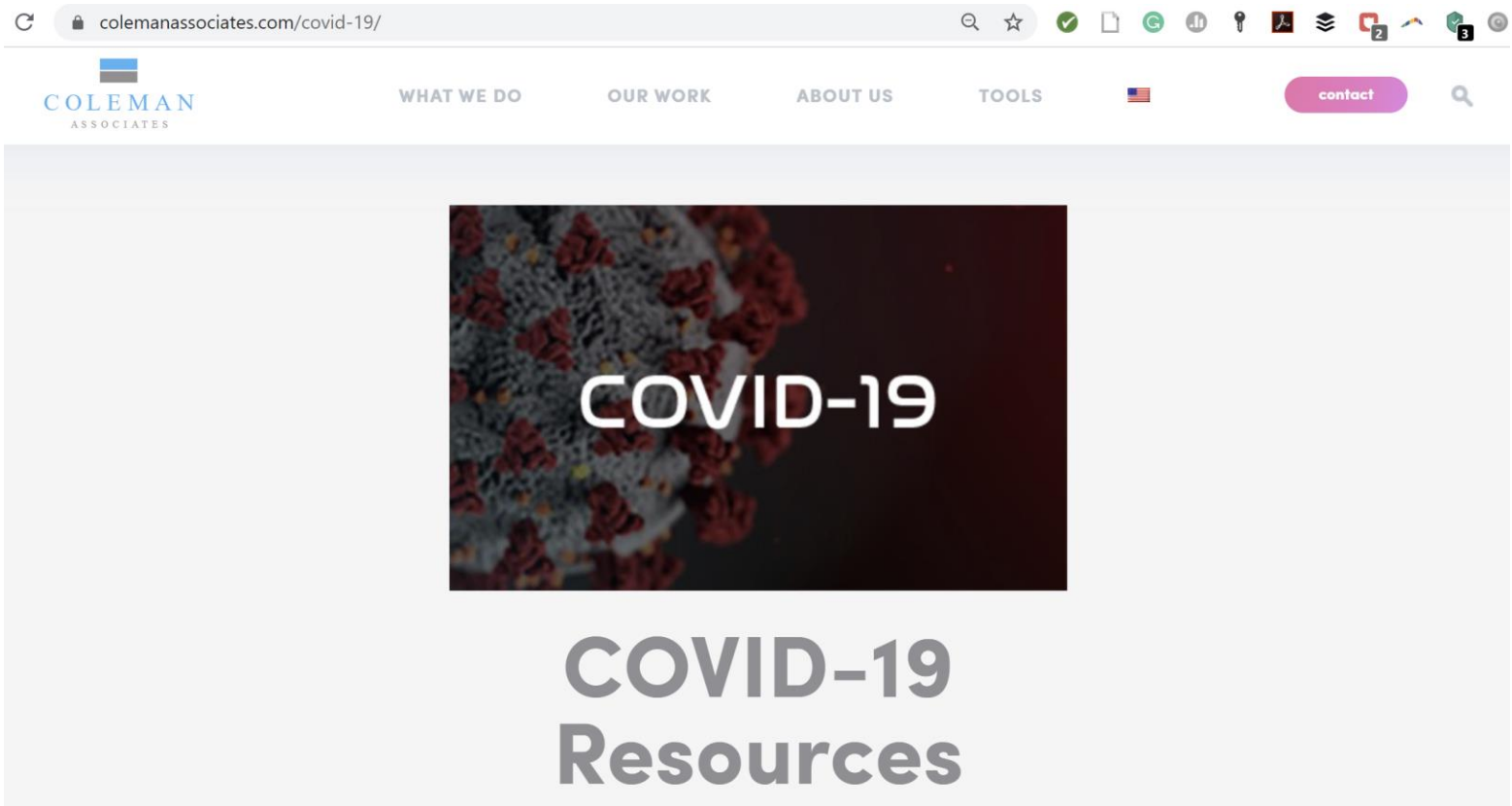
Next Steps:

- Go back to your health center and get started!
- Communicate what you've learned with your health center manager and provider.
- Share your plan for testing when it comes to:
  - Visit Prep
  - Financial Prep
  - Pre-Registration
    - Can you test the "Fast Track" Lane?
- Put a couple of dates on the calendar for the next week.

More Resources Are Available



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1. Wherever you Listen to Podcasts
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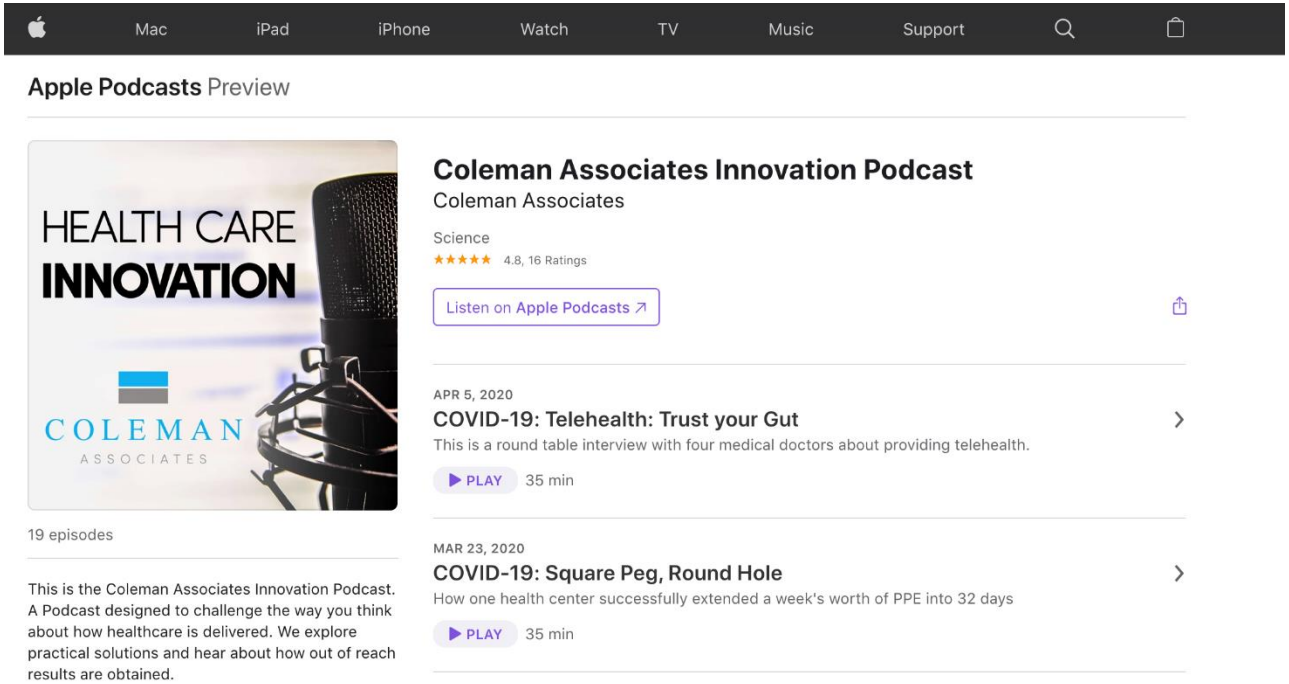

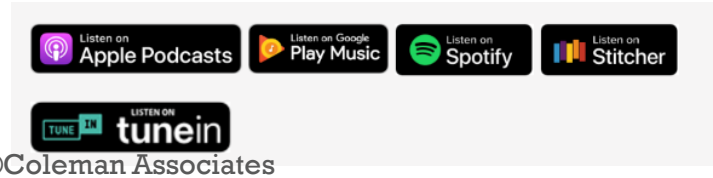

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"Progress is impossible without change, and those who cannot change their minds cannot change anything."

-George Bernard Shaw

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