Managing Demand and Capacity in the Schedule

Expanding Access through Team Care
Monthly Technical Assistance Webinar #7
March 19, 2015
1. Session Overview- Hunter Gatewood
2. Managing Demand and Capacity in the Schedule- Coleman Associates
3. Additional Pearls of Wisdom- Ed Wagner, MD
4. Update on Site Visits, Events & Reminders- Susannah Brouwer
Program Goals

Expand access to primary care services

Foster innovation in the safety net

Improve the efficiency and effectiveness of team care models
Managing Demand and Capacity in the Schedule

Coleman Associates
Building on your Demand Work

March 19, 2015
Moderating Demand

- From the LS:
  - Look at demand from sources:
    - Patient Demand
    - Provider Demand
    - System Demand

- Zoom In
  - How do you reduce provider – driven demand effectively?
  - Have you considered changing your return visit intervals?
  - How do you not lose patients through the cracks?
  - What has scrubbing the schedule revealed?
Scrubbing

- What patterns do you see in scrubbing?
- Who is scrubbing?
- When do they scrub?
- How far out do they scrub?
Building on your Capacity Work
March 19, 2015
QuickStart to Maximize Capacity

QuickStart is a technique to use to ensure that you don’t lose capacity in drips and drabs over the start of each clinic session by making sure that the provider is in the exam room with the patient at the start of the visit.

Keys to QuickStart:
- First appointment could be one that takes less vitaling time.
- Streamline the check in process for the first patient or two.
- On-time AM huddle to ensure all staff are at work and ready to start on time.
- Get support staff out to lunch on time so that they can return on time.
# Quick Start Example

## Sample Table

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<th>Exam Room Number</th>
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Quick Start

- Zoom In
  - Are you using a standby schedule to maximize your capacity?
  - How are you doing with QuickStart?
  - How do you QuickStart around the huddle time?
  - How do you work the line at the front to not hold people up from the back?
  - What tactics have you found to ensure staff get out to lunch on time?
  - Can you QuickStart every type of visit?
  - Are there visits that are easier to get started on?
  - How does the care team work synchronously together to QuickStart the visit and both sessions?
Next Steps

For the April Webinar be prepared to learn about and discuss

- Simplified Patient Scheduling
- Decreasing Appointment Types
- Standby Schedules
- Flow Coordination and Tetris-ing as it relates to the new schedule template
Reducing Clinic Visits

- Most chronic diseases have “undulating” courses, so follow-up is important.
- A sizable % of adult primary care visits are for follow-up with recently diagnosed and stable chronic disease pts.
- Lots of research and real-world experience indicate the safety and effectiveness of electronically collecting follow-up data, supporting self-management, and even titrating medications.
- Follow-up can be done by telephone, patient portal, or home visits.
- MAs or LPNs can collect relevant information by protocol and alert RNs or providers when all is not well.
- In a few LEAP practices, RNs titrate meds by protocol over the phone.
Events & Reminders

Exemplar Clinic Site Visits
Scheduled Visits

• Cabin Creek Health System- Charleston, WV- 5/27

• Clinica Family Health Services- Denver, CO- 5/28-29- FULL

• Neighborhood Family Practice- Cleveland, OH- 5/20

• Union Health Center- New York, NY- 5/13

Registration Deadline: March 27
Clinic Profiles & Registration Instructions

Clinic Profiles

Exemplar Site Visit Registration Instructions

- Site visit registration will open at 10 AM on Monday, March 16. The registration deadline is 5 PM on Friday, March 27. The registration pages are listed below and included at the top of each visit summary. You will be asked to register all members of your team in one “event order,” as such you may have the following information ready for each attendee: Name, Title, Email, Business Phone, Cell Phone.
  - Register here for the Cabin Creek site visit
  - Register here for the Clinic site visit
  - Register here for the Neighborhood Family Practice site visit
  - Register here for the Union Health Center site visit

- Each team is allowed to send up to 3 participants to a visit. The visits will each have 10-15 people total, as indicated by the host site. If there are still tickets left for a visit but not enough for your attending team (e.g., two team members but only 1 ticket remaining), email Susannah.

- If there are spaces available after all teams have signed up, we will allow additional participants to join. If your team is interested in sending more than three participants, please email Susannah after you have registered for a site visit with the names of the additional participants.

- As a reminder, your clinic organizations are responsible for all travel and accommodation costs associated with the site visit. Your organization will be instructed to incorporate these costs into their proposed grant budget as part of their application to this program. Note: Due to the high cost of airfare to Charleston, WV, for the Cabin Creek visit, CCI will reimburse project teams for $500 for each participant that attends this site visit.

- There are not draft agendas available at this time for the visits. Please book travel accommodations with the assumption that the visits will last a full day unless otherwise noted.

- At this time, we do not have a list of recommended hotels for each host site (except for Clinica), so I suggest using your favorite travel booking website. In the meantime, if I receive hotel recommendations, I will forward them to the registrants.

- Further details for each visit will be provided throughout April and May.
Events & Reminders

Complete list of events and reminders on program page: [www.expandingaccess.wikidot.com](http://www.expandingaccess.wikidot.com)

Upcoming Events

- Next Monthly webinar on Thursday, April 16 led by Coleman Associates
- Exemplar clinic site visits scheduled in May- registration deadline March 27

Notes & Reminders

- Action steps assigned by Coleman Associates for April 16 webinar
- Next quarterly reporting due April 30
- Monthly Roundtable Calls cancelled unless otherwise notified