La Clínica De La Raza

PHLN Year 2 Project Aim

By February 2020, Clinical Office Assistants (COAs) will have completed the “uplift” trainings.

As a result, UDS income reporting and demographic reporting will increase from 50% complete in CY 2018 to 75% complete in CY 2020.

Measures for Success

Process measures:
• Focus group ✔
• Observational interviewing ✔
• Creation of competency check-list
• Developing trainings & materials

Outcome measures:
• All COAs received training
• 75% of COAs signed off on competency checklist
• COAs actively conduct patient outreach
• Data collection has improved
Standardizing

Findings

• Workflow variations across counties, across sites, and across Care Teams

• → Standardization → Optimization

• Opportunity to leverage internal resources in Support Departments

Adaptations

• Workflow mapping taskforce
  • Goal: create 1 “map”, allowing for some county-specific variation

• Start with trainings on Customer Service & De-escalation
Changes

**Tested Changes**

• Workflow Mapping Taskforce
• Piloted COA Workflow training
• Piloted trainings for Customer Service and De-escalation

**Implemented Changes**

• Taskforce sustained and developed workflows for:
  • Payor verification
  • New patient registration (UDS)
  • Front desk check-in
  • Sensitive Services

• Customer Service and De-escalation training adapted and will be rolled out in December
Using Data for Improvement

- Qualitative data from COA Uplift Focus Group

- Baseline data:
  - UDS CY 2018: income, SOGI, special populations
  - Health Plan Assigned but Not Seen
  - Insurance denials

- Feedback from monthly stakeholder calls

“What outcomes do you hope for?”

- Clearly defined COA roles and expectations
- Standard workflows
- Staff feel prepared to fill demographics fields even with complicated situations
- Effective ways to defuse a situation
- Cross communication between teams

### UDS CY 2018: Baseline Data

<table>
<thead>
<tr>
<th></th>
<th>2016</th>
<th>2017</th>
<th>2018</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Total Patients</strong></td>
<td>84,887</td>
<td>86,884</td>
<td>90,725</td>
</tr>
<tr>
<td><strong>Services (% of patients)</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Percentage of Medical Patients</strong></td>
<td>72.17%</td>
<td>74.49%</td>
<td>73.27%</td>
</tr>
<tr>
<td><strong>Number of Medical Patients</strong></td>
<td>61,259</td>
<td>64,717</td>
<td>66,475</td>
</tr>
<tr>
<td><strong>Income Status (% of patients with known income)</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Total Patients with Known Income (Denominator)</strong></td>
<td>41,797</td>
<td>44,411</td>
<td>45,247</td>
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</tbody>
</table>
Strategies for Success

1. COA Uplift Stakeholder Calls
2. Workflow Mapping Taskforce
3. New Role: Front Desk & Registration Operations Specialist
4. Training Pilots
Key Tools & Resources

- COA Uplift Focus Group Questions & Facilitation
- Workflows for: Registration, Check In, Payor Verification and Sensitive Services
- Job Description for ‘Front Desk and Registration Operations Specialist’
Next Steps

Spreading

• Training roll out
• COA competency checklist
• All COAs engaged in proactive patient outreach

Sustaining

• ‘Front Desk and Registration Operations Specialist’ role
• Transition to Epic will reinforced with new system
Current Challenges or Barriers

1. More practice variation across sites than anticipated

2. Communication of updates to practice to all relevant staff