

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	2016	2017	2018
Total Patients	84,887	86,884	90,725
Services (% of patients)	2016	2017	2018
Percentage of Medical Patients	72.17%	74.49%	73.27%
Number of Medical Patients	61,259	64,717	66,475
	2016	2017	2018
Income Status (% of patients with known income)			
Total Patients with Known Income (Denominator)	41,797	44,411	45,247

Strategies for Success

1

COA Uplift Stakeholder Calls

3

New Role: Front Desk &
Registration Operations
Specialist

2

Workflow Mapping Taskforce

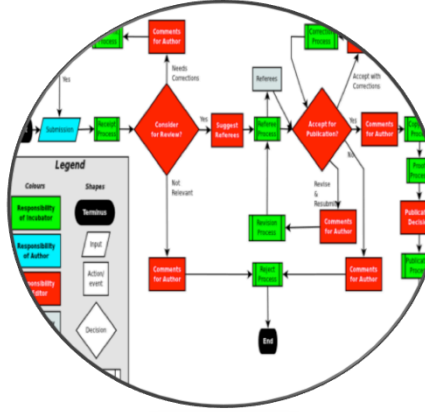
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Training Pilots

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

