OPTIMIZING EFFICIENCY FOR TRIAGE OF MEDICAL CALLS

Part of NPA’s Educational Initiative: Optimizing PACE Operational Efficiencies (OPOE)

Lean Six Sigma Green Belt Candidates:
Kelly Marcella, MSW, Social Work Manager
Emily Martin, MPH, Director of Compliance and Performance Improvement
Nollis Graham, BSN RN, Director of Strategy

Lean Six Sigma Black Belt Consultant:
Marliese Bartz from Novaces

Project Workgroup Members:
Sherry Colindres RN, Homecare Manager
Nicole Mainey, RN, Primary Care Nurse
Karen Rizzuto MS, RD, LDN, Nutrition Manager
Sam Topazio MBA, Business Analyst
Raul Vidoudez, NP Primary Care
Lisa Mortell, RN, Homecare Nurse
Eileen Zaino, PACE Center Secretary
Kathy MacCoramack, RN, Primary Care Nurse

THE PROJECT:
Business Need for Improving Medical Call Triage:
Neighborhood PACE has three PACE Centers which experience bottlenecks in managing high telephone call volume. By improving our telephone triage criteria and documentation process, we can avoid potentially negative clinical outcomes, improve customer satisfaction, and avoid re-work.

"Using Lean Six Sigma, our team was able to break through barriers and transform a time-intensive workflow into a highly efficient model for handling medical calls." – Nancy Beigal, MPH, Project Champion

"The episodic phone lets me get in touch with a provider right away" – Homecare Nurse

HOW TO SUSTAIN CHANGE:
Dashboard for weekly monitoring

CONTROL PLAN:
We created a detailed plan to ensure our process continues to function properly and what to do if it doesn’t:
• What is being measured?
• How are we measuring?
• What are the control limits and requirements?
• How frequently are we measuring?
• Who owns the business process?
• What is the response plan from the business owners if the process is not operating efficiently.

See the handout for our detailed control plan

“Lean Six Sigma for Neighborhood PACE: We identified the ROOT CAUSE of the problem FRONT-LINE CLINIC STAFF created workflows to fix the root cause of the problem. We adopted continuous WEEKLY PROCESS MONITORING. It's how we know that our workflows are working!”

THE PROJECT:
Hard Benefits:
In adopting a new method for managing medical calls, we were able to:
• Improve our complete documentation rate for medical calls from 38% to 88%. Disjointed and incomplete documentation has been greatly reduced.
• Increase the specificity of documenting reasons for medical calls from 24% to 80%. We now use precise labeling of medical calls in our medical record.
• Improve staff satisfaction with medical call management. Homecare staff making visits in participants’ homes take comfort in knowing their phone calls to providers will be answered right away.

Soft Benefits:
With improved labeling and telephone call documentation, our providers can more effectively maneuver through the medical record. No more searching through the medical record for documentation – it is all labeled correctly.

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Our PACE organization struggles with:
• Too many projects
• Projects that take forever
• Projects that fade away and revert to old habits
• Difficulty with change management

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