A Strategy for Improved Access to Care

Jake Moore, Enterprise Access Manager

Penn Medicine

Agenda

- Overview
- Patient Portal Online Scheduling
- Radiology Scheduling Tickets
- ‘New to Penn’ Online Scheduling
- Electronic Waitlist Management
- Summary

myPENNMEDICINE

University of Pennsylvania Health System

The University of Pennsylvania Health System includes:

- Six Acute Care Hospitals
- Women's & Babies Hospital, Psych Hospital, Rehab Hospital, Behavior Health Hospital
- 4 Employed Physician Organizations (including a Faculty Practice Plan)
- Primary Care Provider Network
- Over 15 Regionally Distributed Multi-Specialty Facilities
- Over 175 provider locations
- Home Care, Rehabilitation, Hospice and a Nursing Home

Licensed Beds	3,000
Total Employees	37,500
Physicians	5,000
Total Admissions	140,000
Clinical Revenue	~$7 Billion
Outpatient Visits	5.4 Million
Square Feet	Over 5.5 Million
Research Awards	$740 Million

UPHS Acute Care Hospitals

Hospital of the University of Pennsylvania

Licensed beds: 821
Admissions: 40,000

Penn Presbyterian Medical Center

Licensed beds: 331
Admissions: 14,600

Lancaster General Hospital

Licensed beds: 630
Admissions: 36,000

Pennsylvania Hospital

Licensed beds: 567
Admissions: 24,000

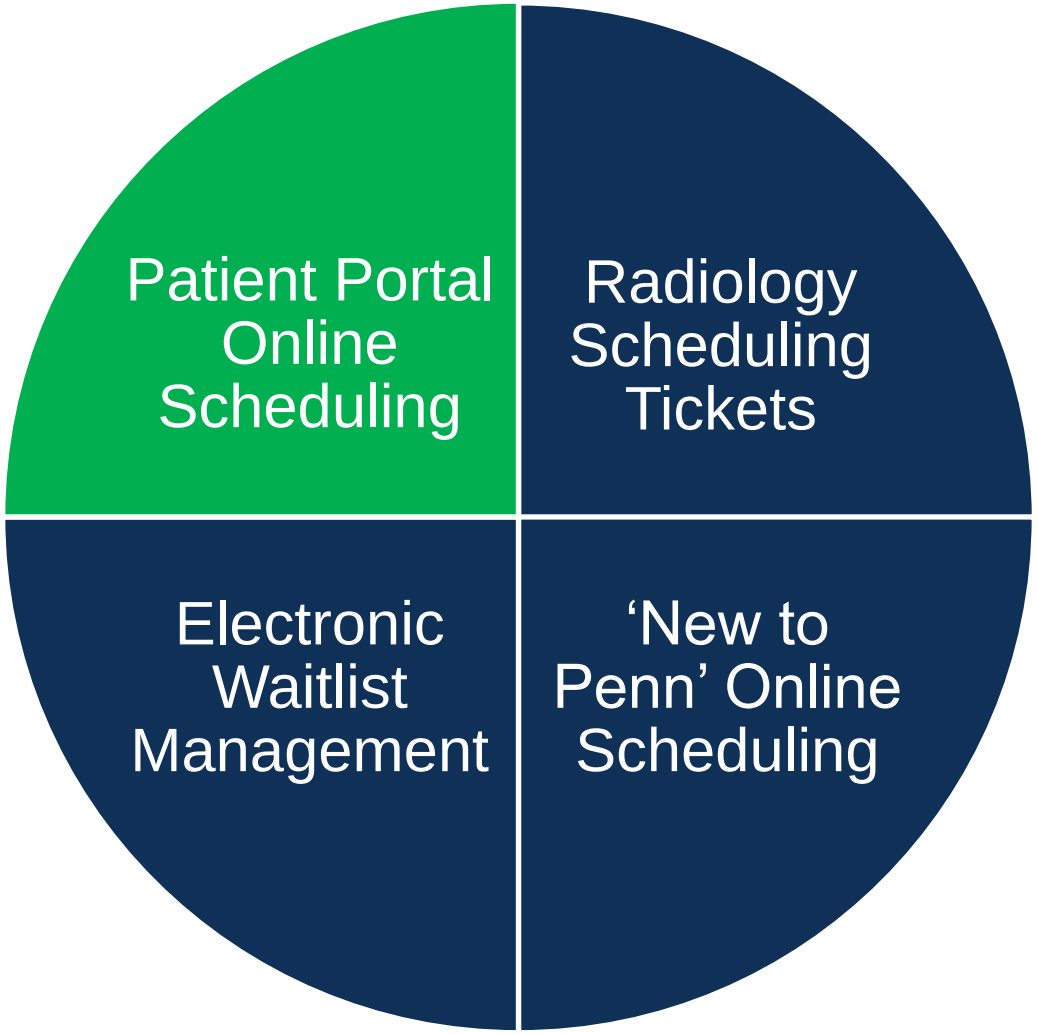
The Chester County Hospital

Licensed beds: 277
Admissions: 15,000

Princeton Medical Center

Licensed beds: 319
Admissions: 14,000

Improving Patient Access

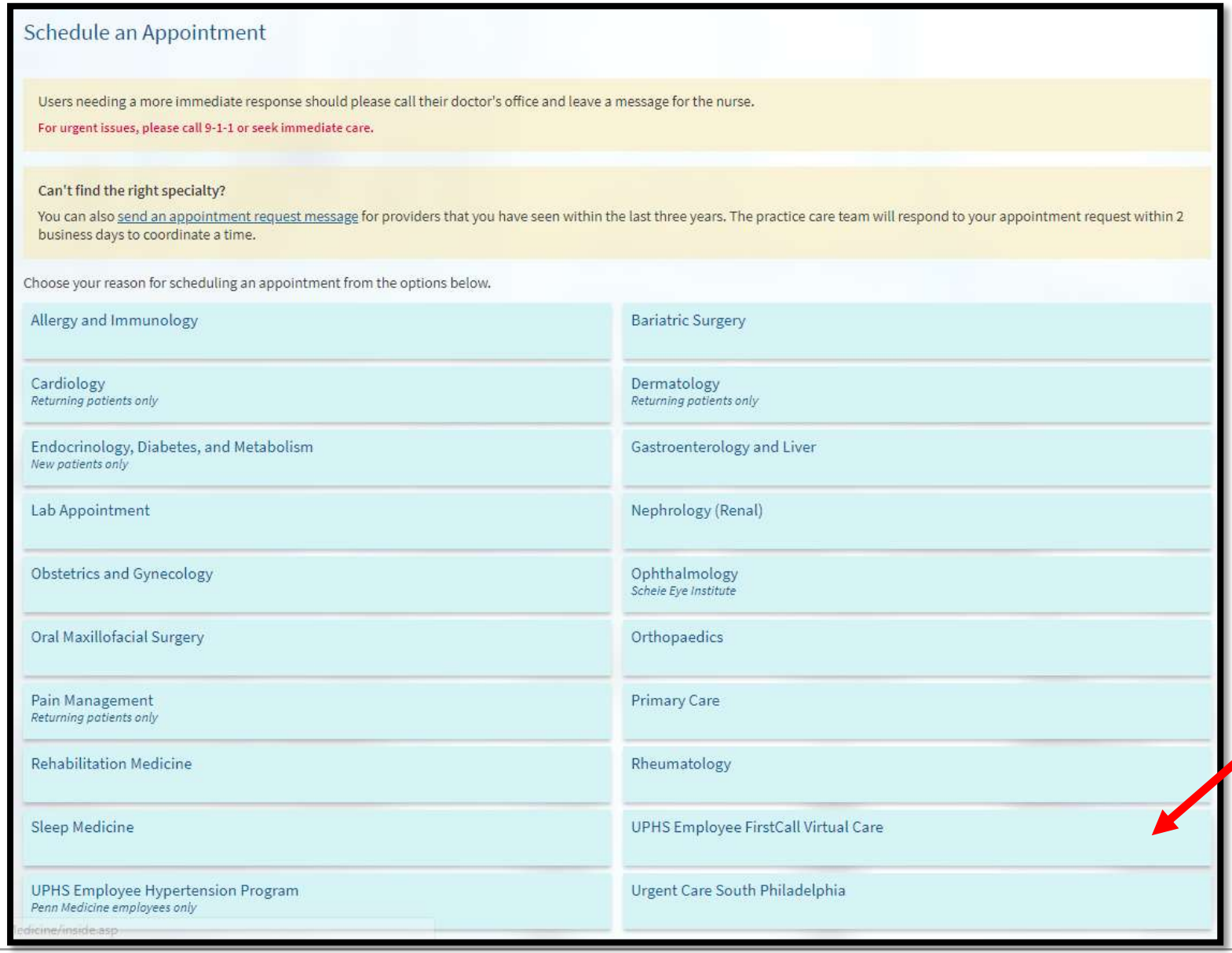


Patient Portal Online Scheduling

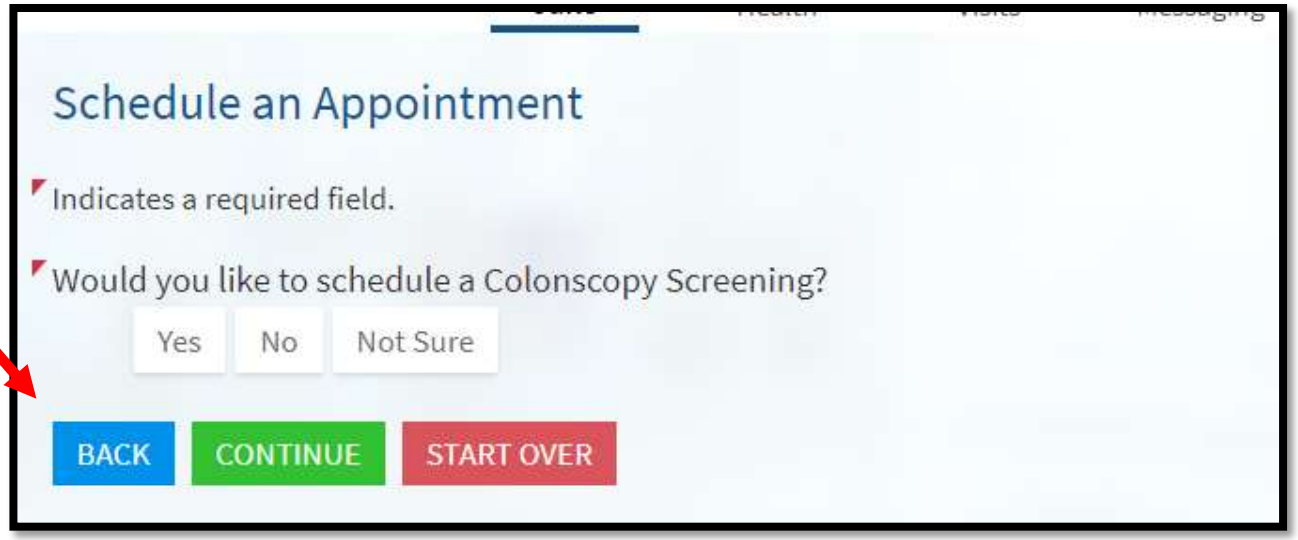
- **Patient portal online scheduling allows patients who have been seen in the health system to schedule a new or return visit with a Penn provider**
- **Available for 18 specialties with over 1300 providers**
- **Project Duration: 2-3 months per department**
- **Scheduled over 170,000 appointments from March 2018-February 2019**
- **Created department specific scheduling questionnaires for new patients**

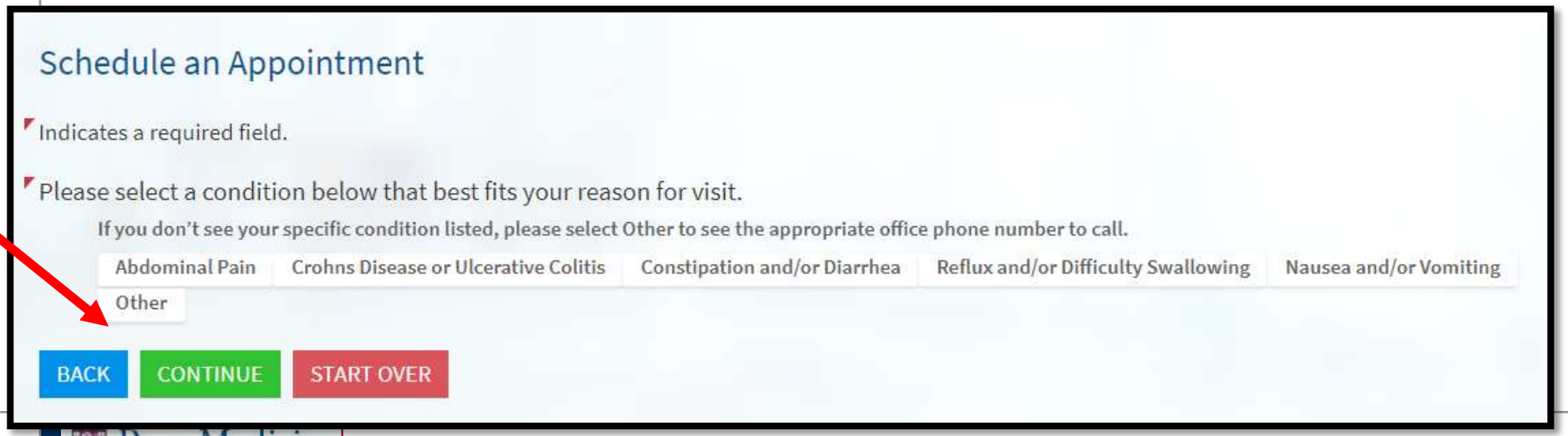
	Topic
Week 1	Intro - Kick Off
Week 2	Work Team - Discovery - FAQs - RFV PPT.
Week 3	Work Team - Review basic Visit Types
Week 4	Work Team - Review challenging Provider/Visit Types
Week 5	Confirm Components of Build/Submit for Build
Week 6	Build
Week 7	Build
Week 8	Internal Demo/Test/Fixes
Week 9	Practice Testing
Week 10	Fix Build
Week 11	GO Live

Departments Live



Patient Scheduling Questionnaire



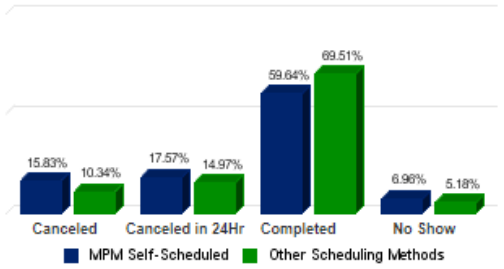


Scheduling Reporting

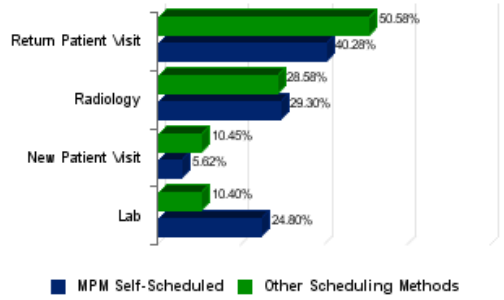
MyPennMedicine Patient Self-Scheduling Activity Summary
Appointments Scheduled for Month of February 2019

Penn Medicine

Appointment Outcomes



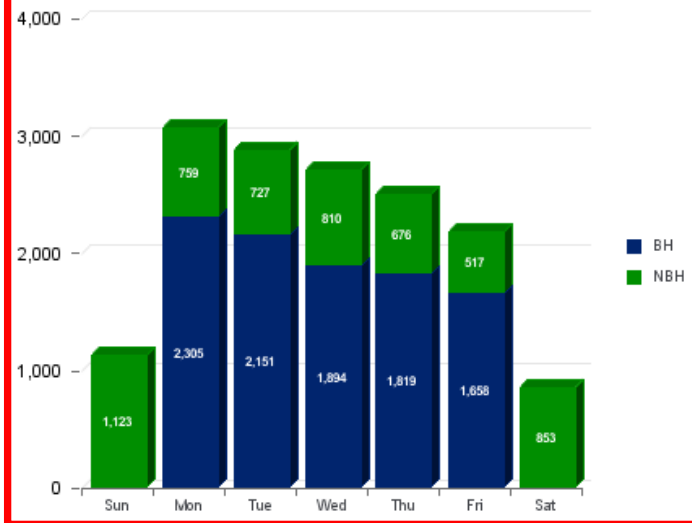
Visits By Category



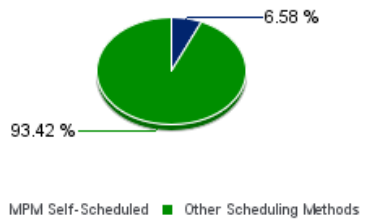
Top 10 Departments

Department	
PATH LAB RADNOR	863
PENN MED LAB AT BUCKS	820
LAB PERELMAN 1ST FLOOR	774
PENNCARE MED ASSOCIATES OF BUCKS	660
RAD HUP PCAM GROUND US	383
SPRUCE INTERNAL MEDICINE PMWS	374
PENN OBGYN AND MIDWIFERY CARE PMWS	349
PATH LAB VALLEY FORGE	327
LABORATORY SERVICES PMCH	278
LAB DRAWSTATION PMWS FLR 8	263

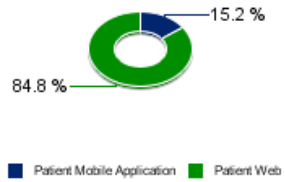
Appointments Scheduled By Day Of Week



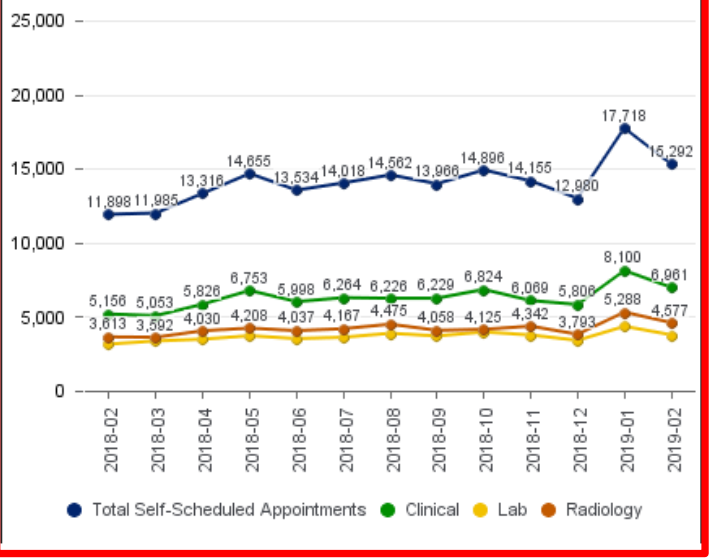
Appointments Scheduled



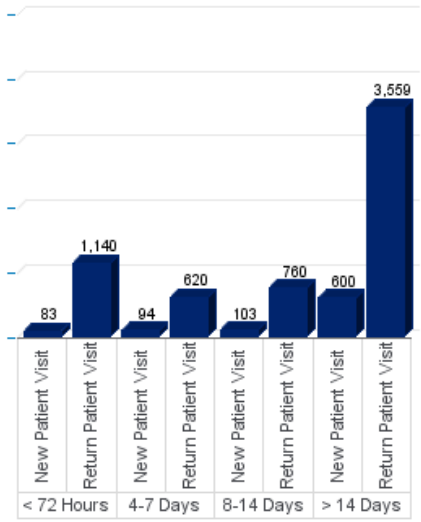
Appointment Self-Scheduling Methods



Apppointments Scheduled By Month

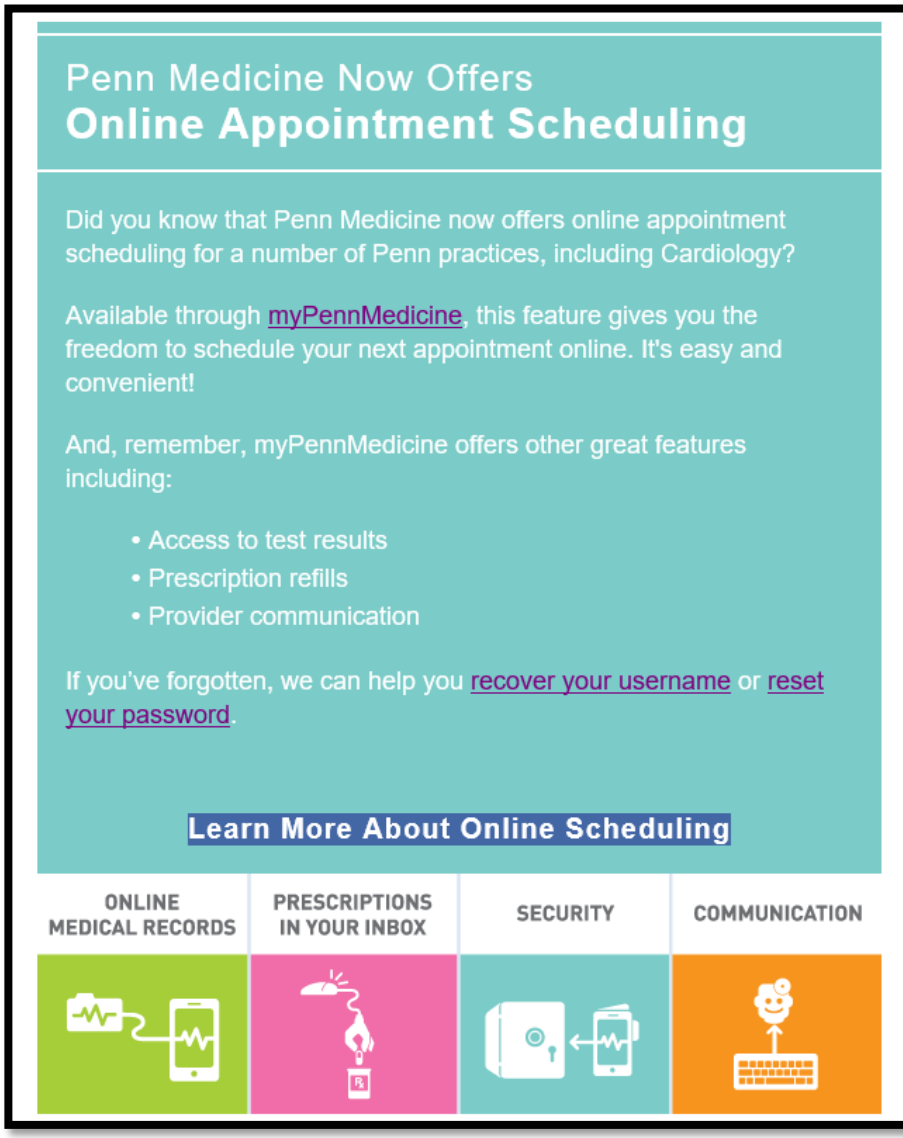


Clinical Appointment Lag Breakdown



Marketing

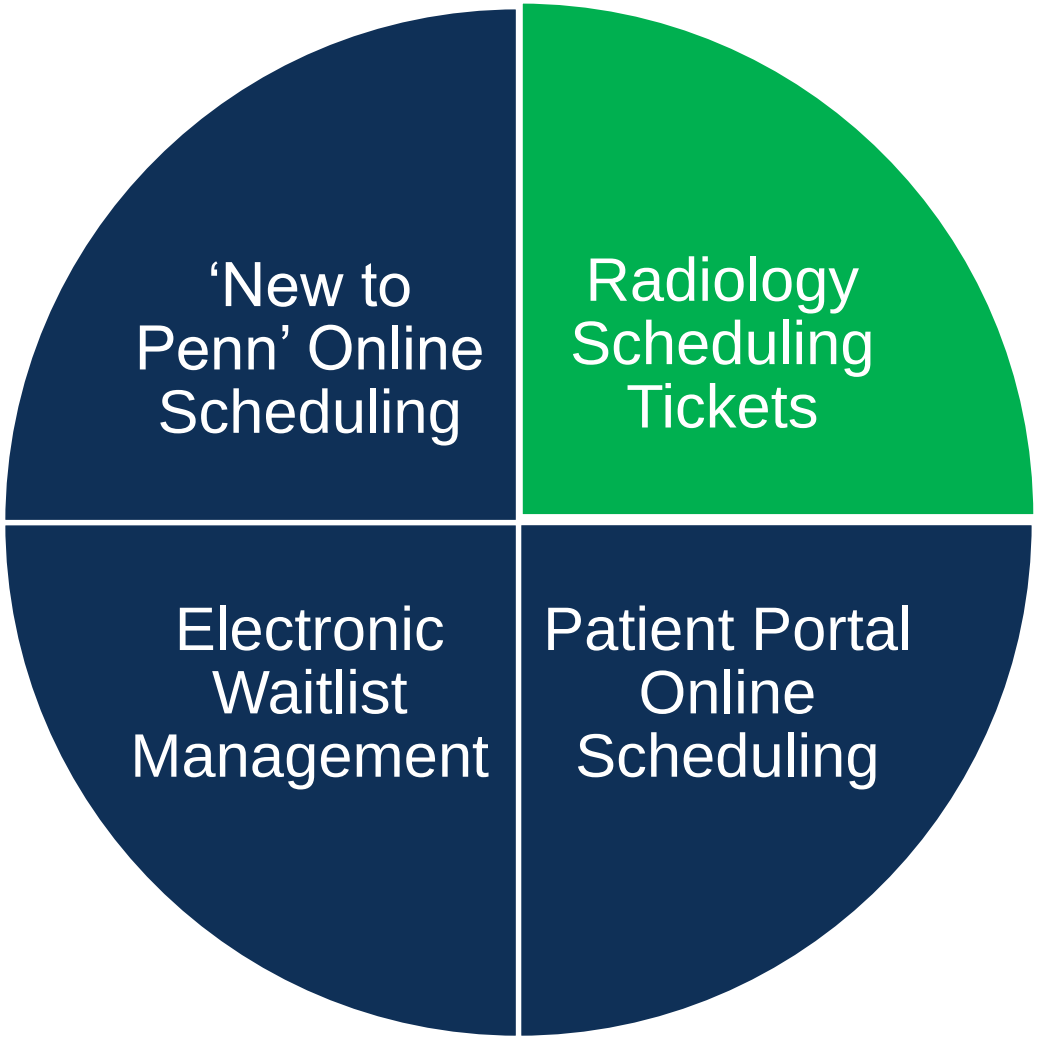
- **Targeted emails for new departments**
- **Education link on completion page of electronic Press Ganey**
- **Practice materials such as table tops and business cards**



Lessons learned

- Developed kick out questions to screen out patients
- Created logic to automatically send patients to new vs. return workflow based on 3 year history within department
- New patient scheduling questionnaire top 5-10 conditions based off cadence scheduling questionnaires
- Robust testing to ensure accurate scheduling
- Updated center names to practice addresses for location selection starting with city

Improving Patient Access



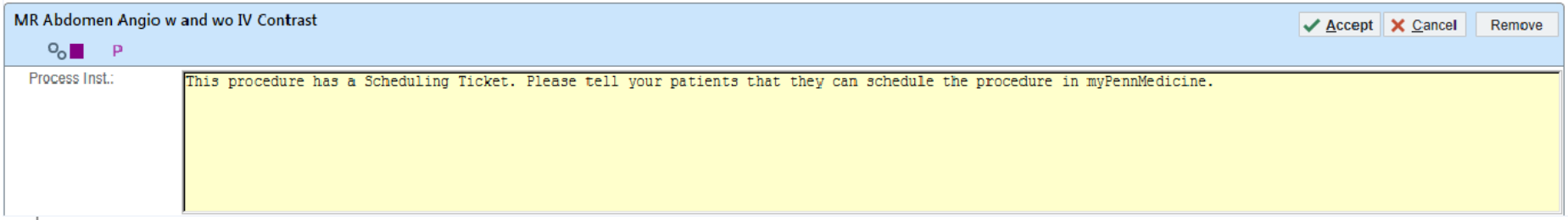
Scheduling Tickets – Radiology

- **What is a scheduling ticket?**
  - A scheduling ticket is message that is sent automatically by an ordering provider through the portal that gives a patient access to self-schedule based off of an order.
- **What radiology modalities are currently live?**
  - Screening Mammo, CT, MRI, GI/GU, US, and X-Ray
- **Will all radiology orders available for Portal Scheduling tickets?**
  - Not all radiology orders are schedulable depending on order and scheduling complexity
- **How will a provider or patient know if a radiology order is schedulable through the portal?**
  - Documentation in both process instructions (provider) and scheduling instructions (patient) will note if schedulable through the portal.
- **Impact to the Providers workflow?**
  - Absolutely nothing! Providers will continue to use the same ordering workflow and the ticket will be generated and sent automatically to the patient.

Portal Process Instructions (Provider View)

When a provider orders a radiology study that is schedulable in the portal, process instructions will be displayed automatically.

- **Provider View:**



Portal Order Requisition (Patient View)

FERN HILL
915 Old Fern Hill Rd
Bldg D Suite 400
West Chester, PA 19380-3420
Phone: 610-738-2556 Fax: 610-738-2666

IMAGING

Patient Information

Patient Name	Sex	DOB
Testendo, Bala (641628631)	Female	12/1/1973

Patient Demographics

Address	Phone	E-mail Address
45 Oak PHILADELPHIA PA 19104	999-333-7878 (Home)	none@none.com

PCP

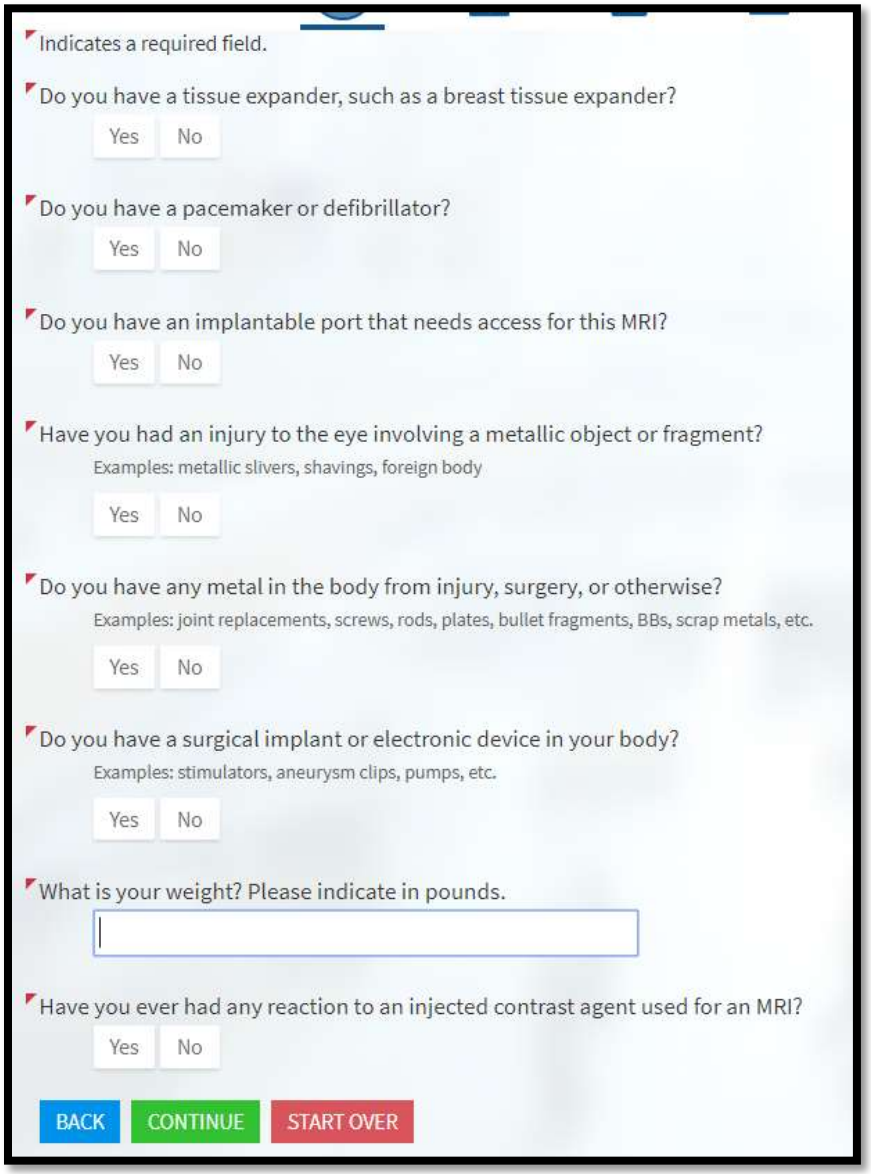
Scheduling Instructions

You have a Scheduling Ticket for this order. When you visit mypennmedicine.org to schedule your MRI you will find the Scheduling Ticket option under the Appointments tab at the top of the page.

To allow time for us to obtain insurance authorization, appointments scheduled through myPennMedicine will not be available within the next 7 days. If your study is of a more urgent nature, please call 267-758-4800 to schedule.

Scheduling Ticket Scheduling Questionnaire

- **Custom scheduling questionnaires per modality to filter out inappropriate patients**
- **Questions based off scheduling questionnaires used by scheduling staff**
- **Certain questions route to specific locations**



Radiology Dashboard

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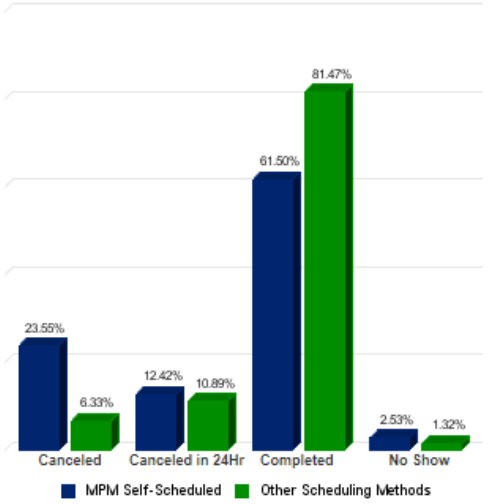
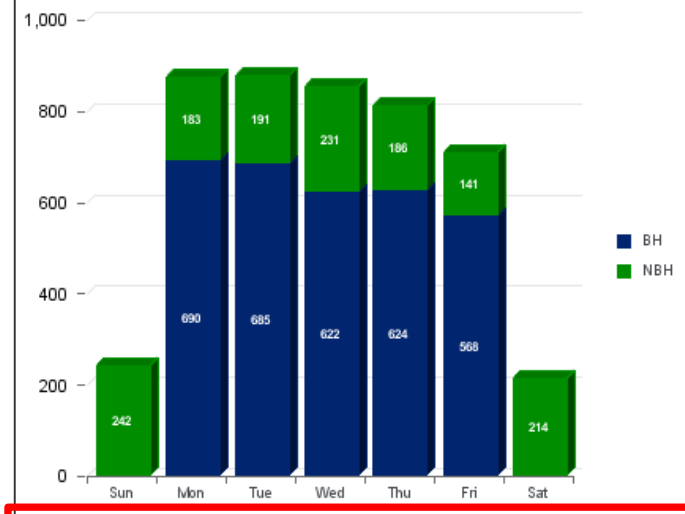
Appointments Scheduled for Month of February 2019

Penn Medicine

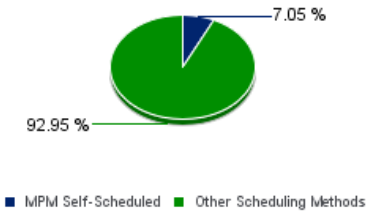
Appointment Outcomes



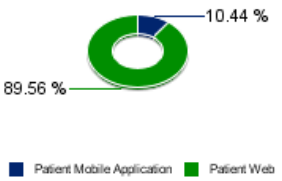
Appointments Scheduled By Day Of Week



Appointments Scheduled



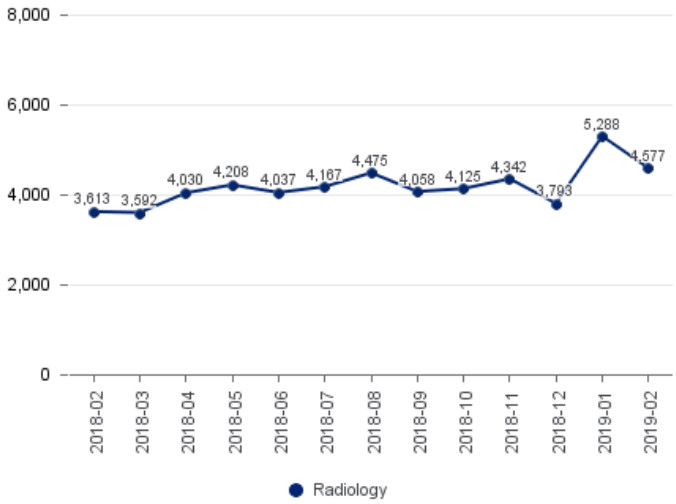
Appointment Self-Scheduling Methods

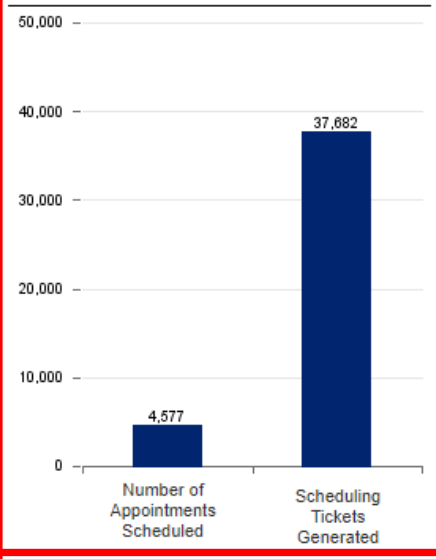


Top 10 Departments

Department	
RAD HUP PCAM GROUND US	383
RAD PAH CATHCART 2 MAMMO	245
RAD HUP PCAM GROUND MAMMO	243
RAD PAH CATHCART 2 US	234
RAD HUP PCAM GROUND XRAY	198
RAD HUP PCAM GROUND MRI	194
RAD DCR RADNOR US	169
RAD DCR RADNOR MAMMO	159
RAD HUP PCAM GROUND CT	149
RAD PPMC PMUC 7TH FL XRAY	104

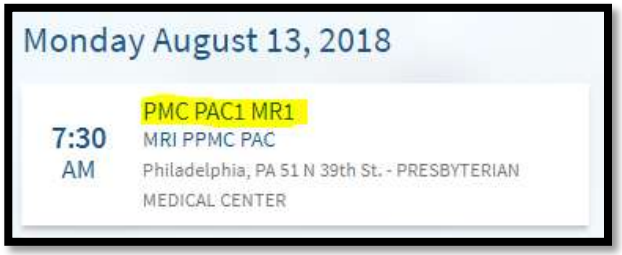
Apppointments Scheduled By Month



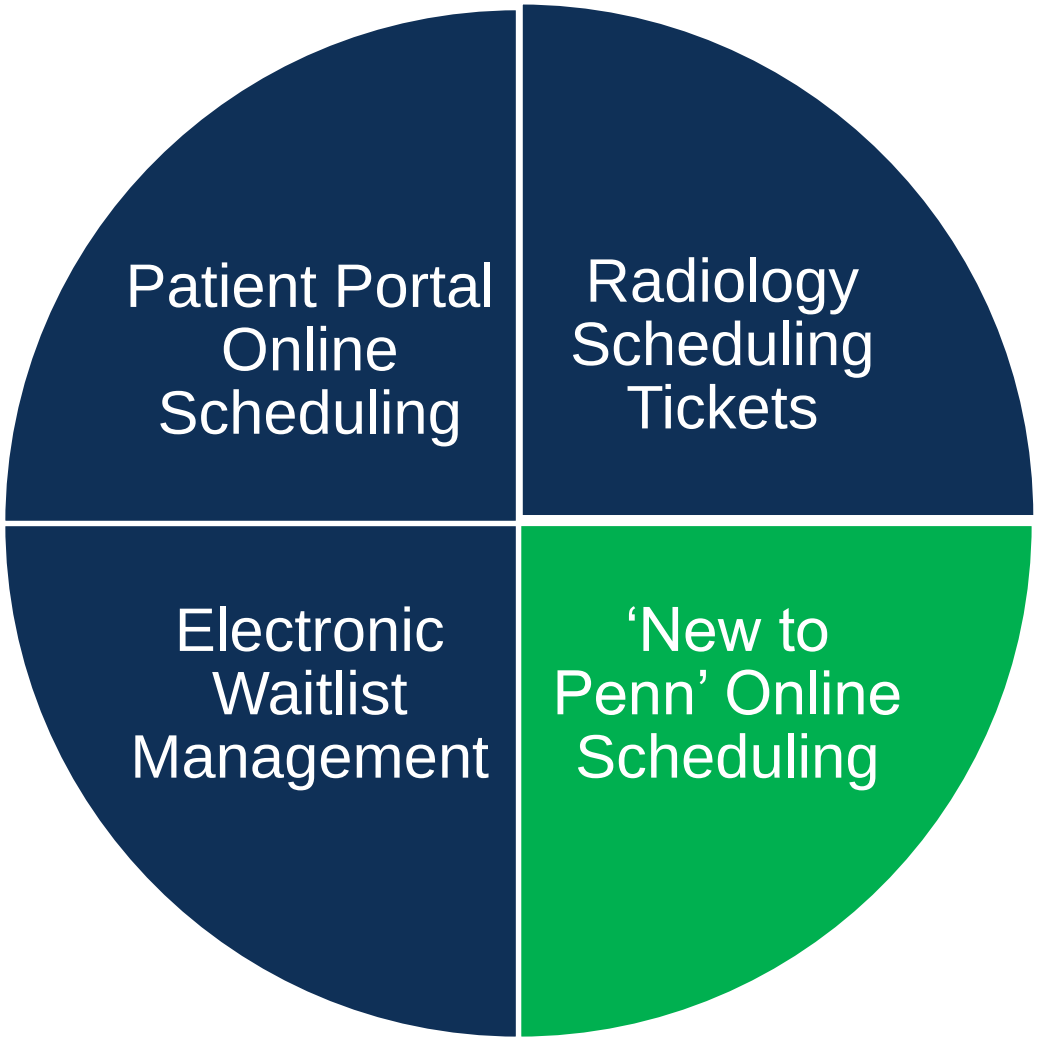


Lessons Learned

- **Create indicators for both patients and providers on scheduling ticket availability**
- **Review all orders and determine scheduling ticket availability based on scheduling complexity and appropriateness**
- **Patients with multiple schedulable orders will need to schedule each one individually**
  - Report developed to track multiple orders
- **Resource name from appointment selection can cause confusion for patients**



Improving Patient Access

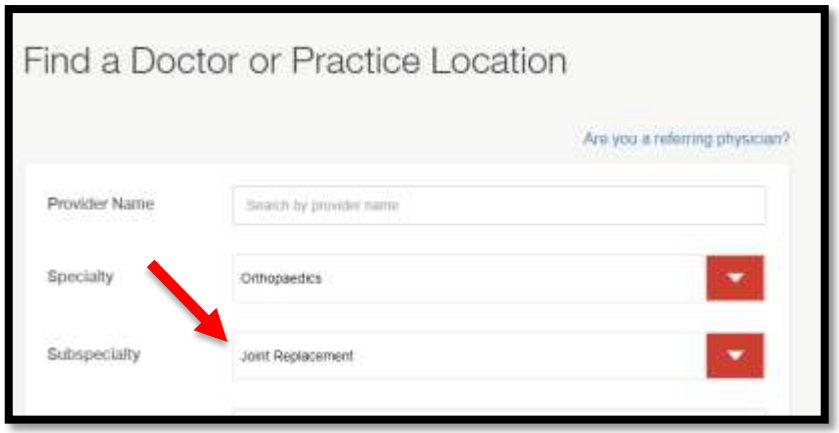


‘New to Penn’ Online Scheduling

- **‘New to Penn’ Online Scheduling allows patients to schedule directly through the Find a doc tool on Pennmedicine.org without a medical record.**
- **Orthopaedics Pilot (go live 12/18/17)**
  - Over 50 providers and 10 locations
- **Utilized the ‘find a doc’ subspecialty list to act a scheduling questionnaire**
- **Website development to link pennmedicine.org to open scheduling**
- **Live in Urgent Care as of May 2018**

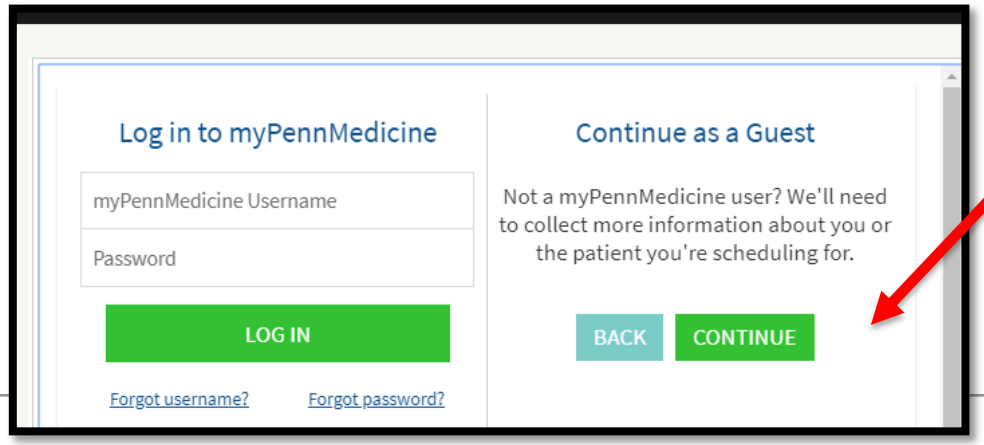
Patient Scheduling Flow

1.

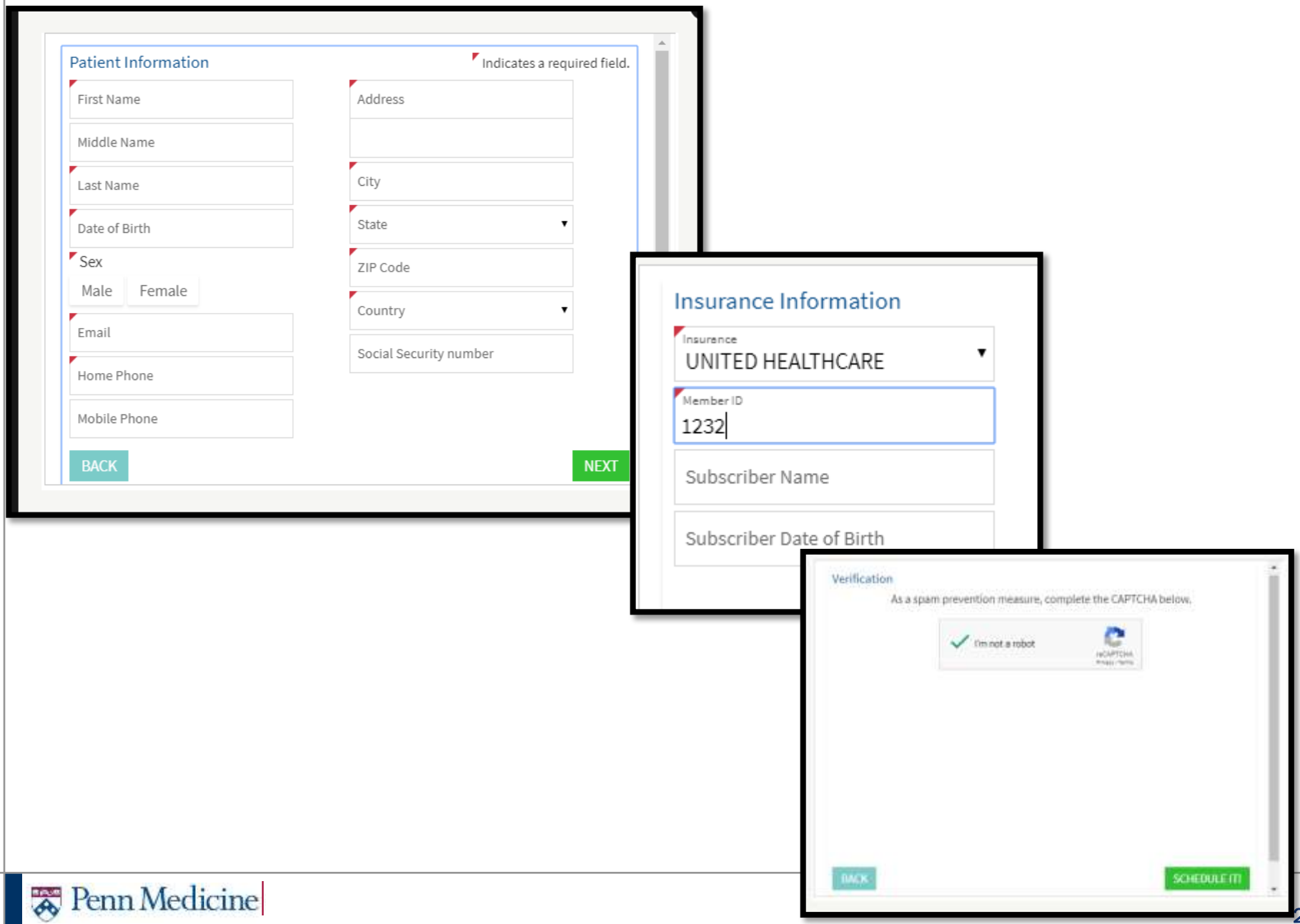


2.

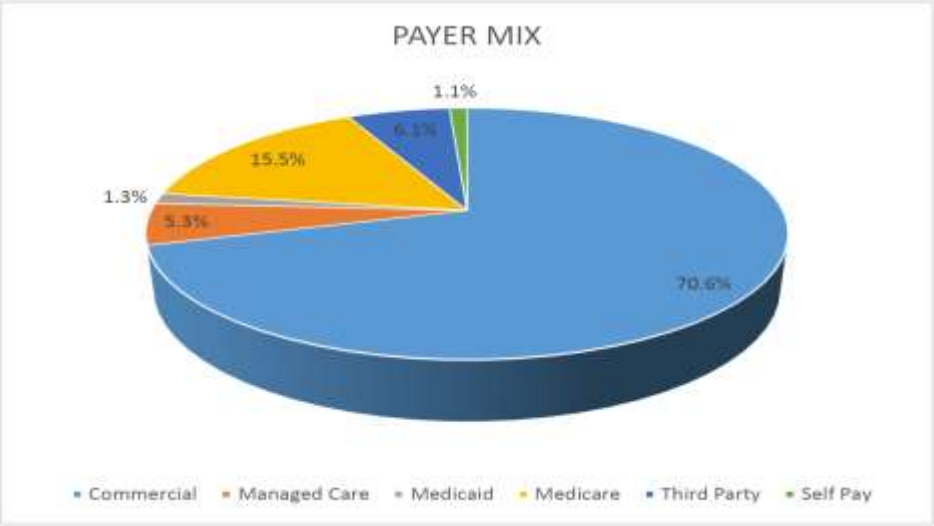
2.



Patient Scheduling Flow



Orthopaedics Service Line Pilot Data



11 % New to Penn

74 % New to Service Line

32% Scheduled Complex Imaging

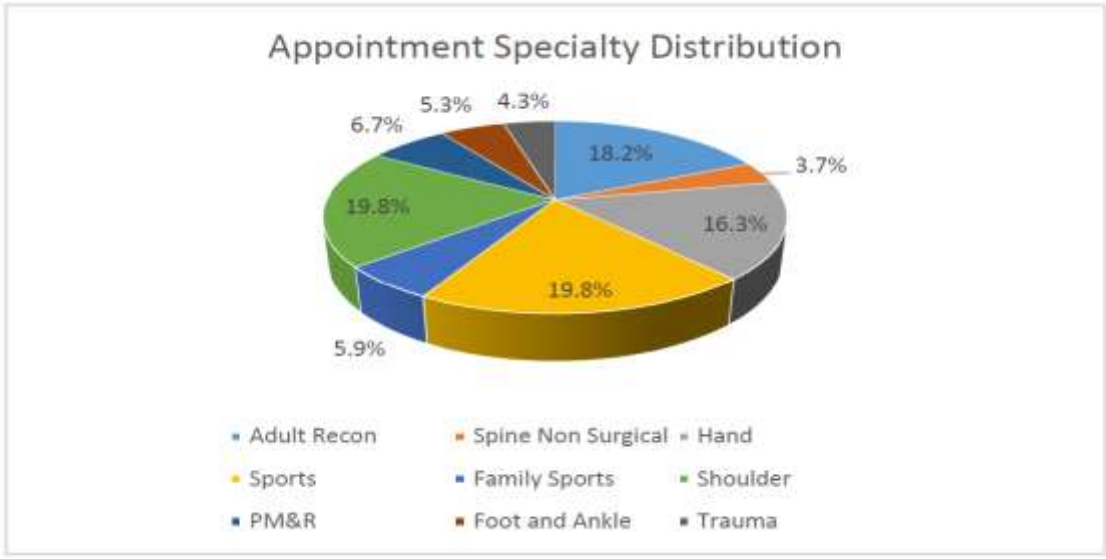
24% 30 days Surgical Yield (sports/ adult reconstruction)

Great Notes from Patients

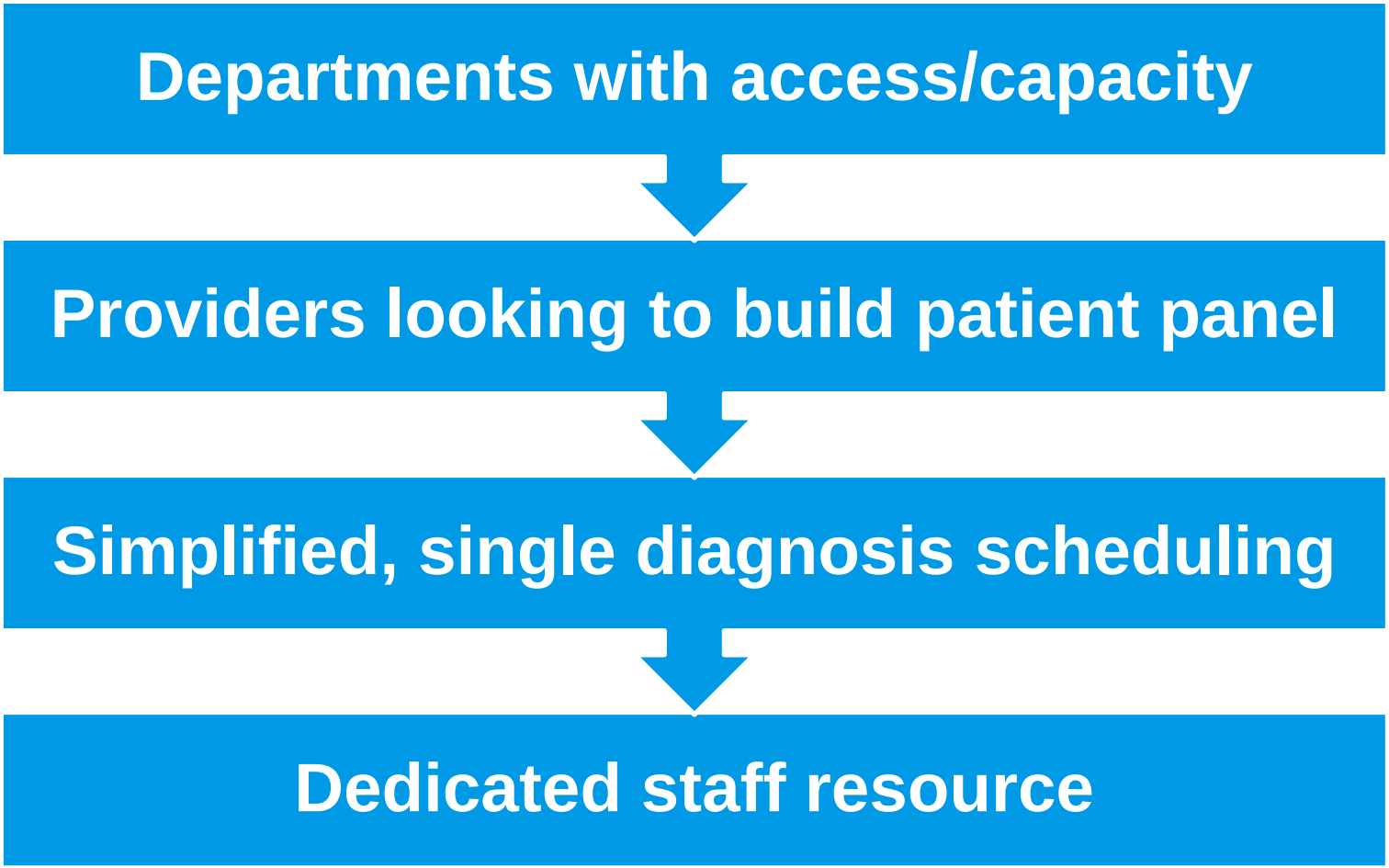
After 2 years of treatment, continuing to have issues, I am looking for a 2nd opinion. Left foot, morton neuromas and other issues, cannot get disc of most recent xrays

Stress fracture in 18 yr old male distance runner. DEXA scan shows osteopenia, blood work shows vit D deficiency & low Testosterone.

I believe I've been living with carpal tunnel in both hands. I have numbness and tingling in my ring, middle, and index fingers after using my hands for more than 5 minutes. I have hardly any hand strength and have quite a bit of pain



Where would ‘New to Penn’ Scheduling be successful?

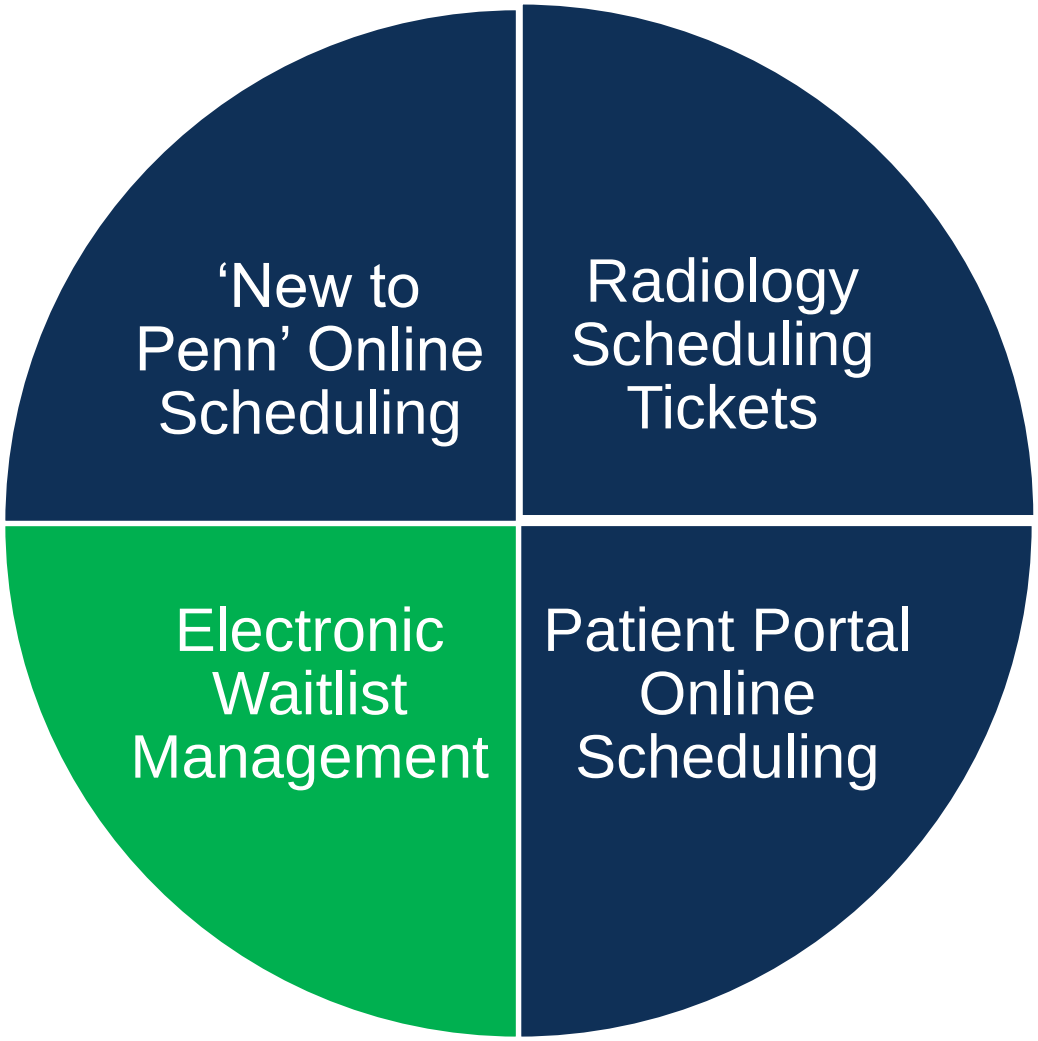


Lessons Learned

- **What worked well?**
  - High scheduling volume with no marketing
  - Ease of patient scheduling
  - Detailed patient comments about visit
  - Practice buy-in
    - Dedicated resource to call

- **Project challenges**
  - Manual practice intervention
    - Must reach out to large majority of patients that schedule to confirm info
  - Limited scheduling rules
    - No scheduling questionnaire
    - Return patient scheduling
    - No electronic cancellation option for non-portal schedulers
  - Duplicate records created
  - Lack of demographic standards when creating a new patient record

Improving Patient Access



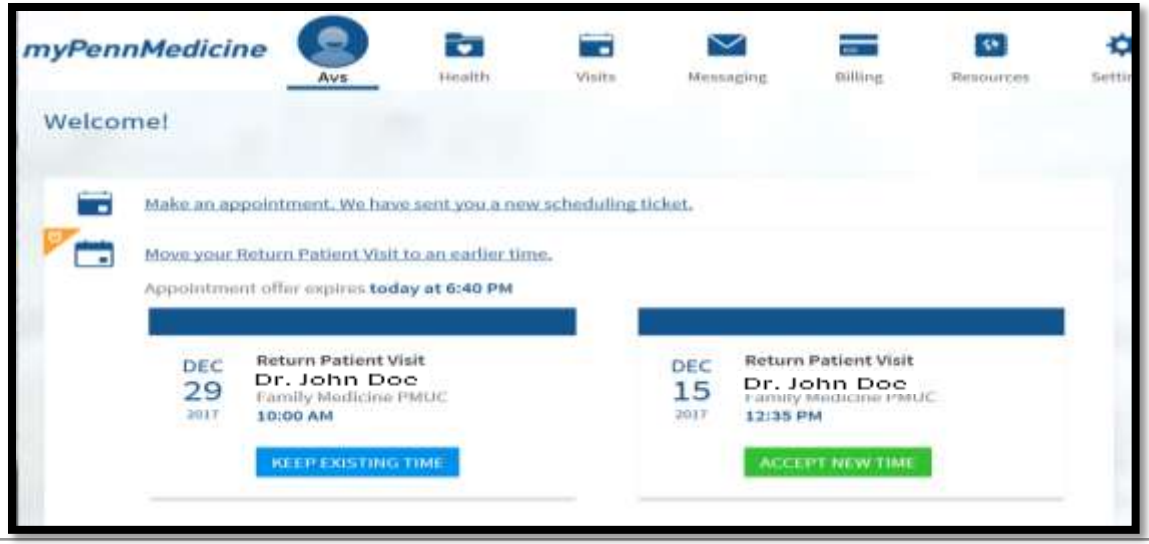
Electronic Waitlist Management

- Electronic wait list is a feature that automatically sends patients a tickler e-mail to notify them of a wait list appointment offering. Patients can then log in to the portal and claim the offer if it is still available or decline it to keep the original appointment and wait for another offer.

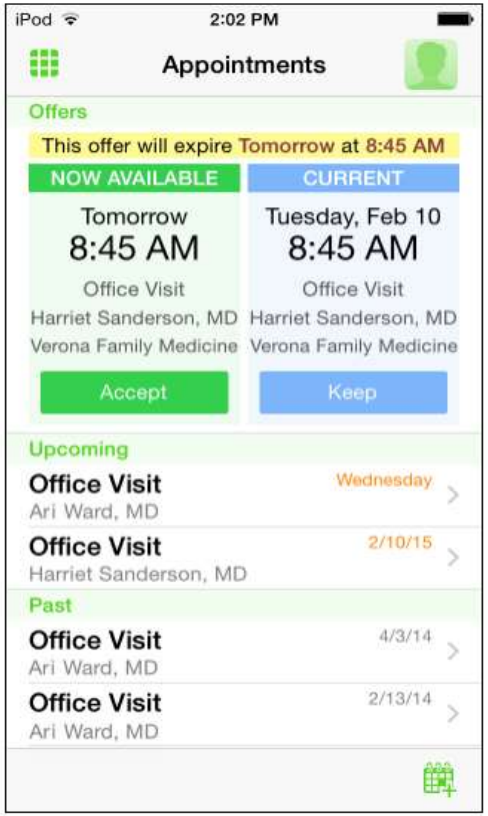
- Go Live January 22nd
  - Pilot in 2 primary care sites (Family Med at PMUC and West Chester)
- April 16th: Expanded to all 33 Primary Care sites

- Offer open from 6pm to 7am the next morning

PC View



Mobile App View

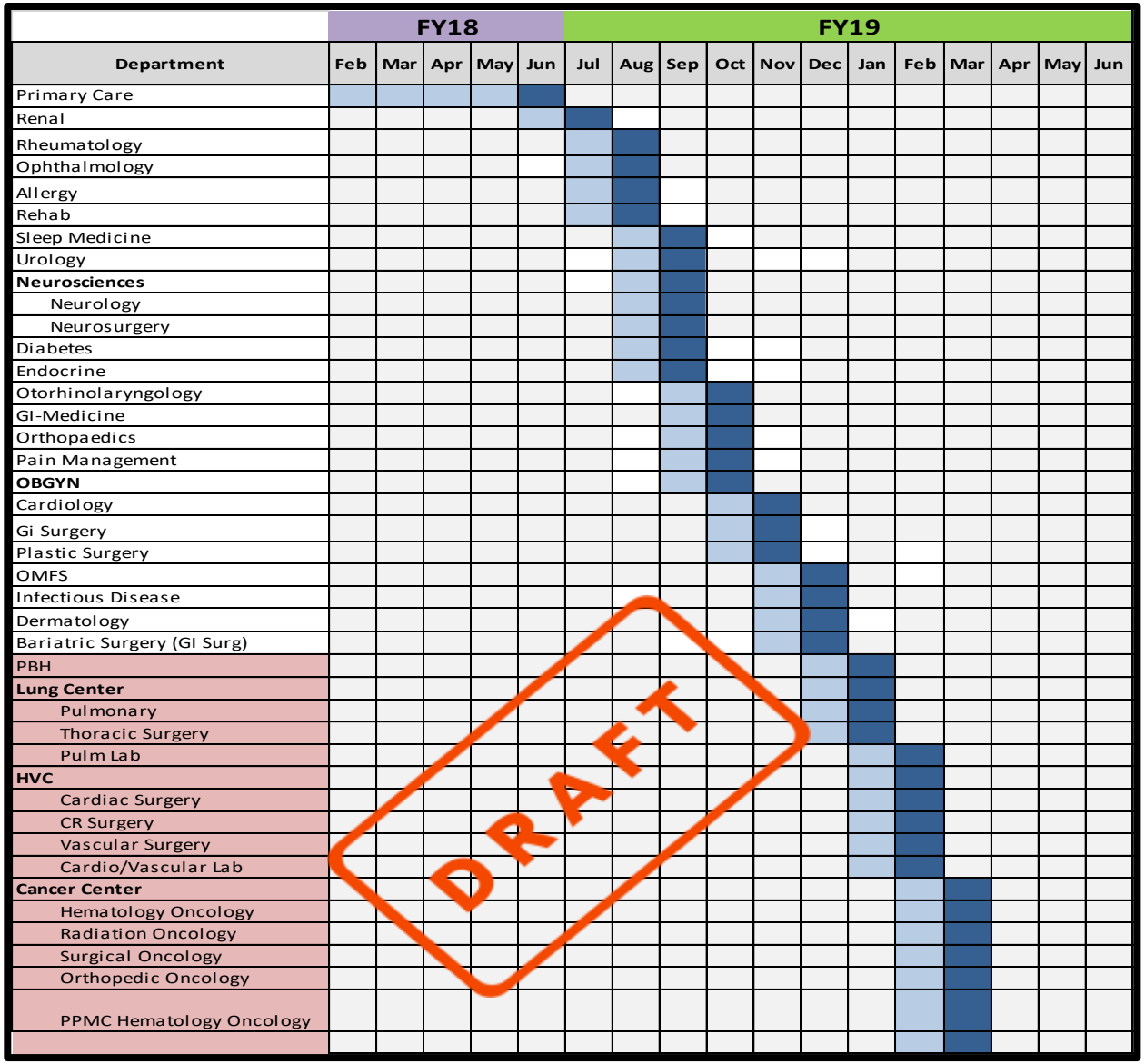


Electronic Wait List (cont.)

- **Findings as of 3/1:**
  - Total of 23,720 offers sent:
    - 1,693 accepted
    - 4,286 declined
  - Acceptance/Engagement Rate:
    - ~7% Acceptance Rate (consistent w/ community avg.)
    - ~25% Engagement Rate
  - Patient mix of accepted appointments:
    - 34% NPV and 64% RPV
  - Average improvement of appt. in days:
    - 30.3 days, max improvement 315 days
  - Staff add to wait list vs. patient
    - 97% staff, 3% patients
- **Completion status of accepted appointments:**
  - Completed: 74%
  - Still Scheduled: 5%
  - Canceled: 16%
  - No Show: 5% (38 NPV, 54 RPV)

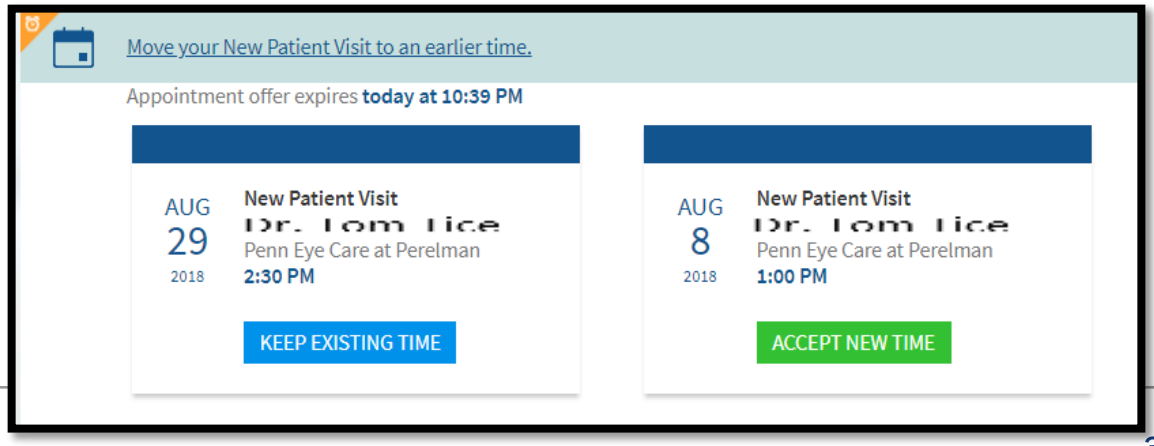
Electronic Wait List Rollout Timeline

- **Projecting departments in red will not be able to go live with electronic waitlist due to complex scheduling/coordinated appointments**



Lessons Learned

- **Pilot with more practices**
- **Patient adding themselves is optional at the epic department level**
- **Engage your call center/scheduling staff staff**
- **Rely on your staff to add appropriate patients to wait list**
- **Department-wide implementations to allow for cross-location options**

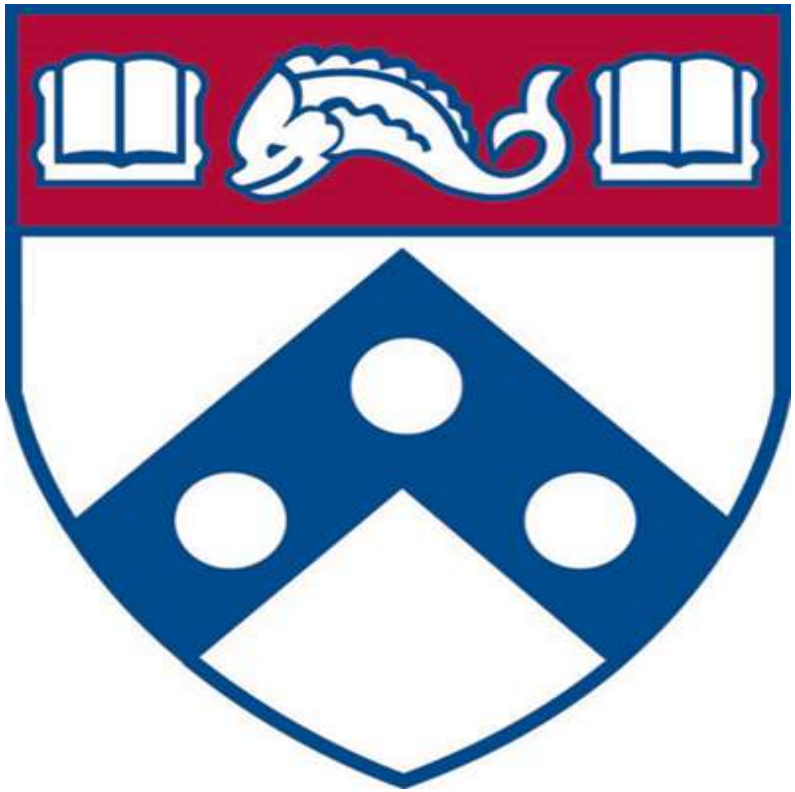


Summary

- **Patient Portal Online Scheduling**
  - Existing patients of Penn Medicine
- **Radiology Scheduling Tickets**
  - Radiology Studies
- **‘New to Penn’ Online Scheduling**
  - Patients who are new to Penn
- **Electronic Waitlist Management**

myPennMedicine

Questions?



Contact Information

- **Jake Moore, Jake.moore@pennmedicine.upenn.edu**