



A Unique Approach to Reminder/Recall

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6/13/2016

*A most sincere thank you to Cindy Smith,
RN BSN, Public Health Nurse, Tacoma
Pierce County Health Department,
without whose support and mentoring, I
would have never tried because I was
afraid to fail.*

Definitions



- Pay for Performance – in healthcare gives financial incentives to clinicians for better health outcomes; such as measuring blood pressure, immunization rates, or counseling patients to stop smoking
- Intervention – a process or treatment applied to improve patient outcomes
- Performance Measure – a process or treatment that is measured for continuous process improvement, with the intention of bettering patient outcomes
- Reminder Recall – the process of identifying patients that need a specific treatment or intervention and informing them they need those services via phone call, letters, or postcards

Definitions



- HEDIS (Health Effectiveness Data Information Set) – a tool used by more than 90 percent of America's health plans to measure performance on important dimensions of care and service
- Corporate Culture – The beliefs and behaviors that determine how a company's employees and management interact and handle outside business transactions. Often, corporate culture is implied, not expressly defined, and develops organically over time from the cumulative traits of the people the company hires.

Acronyms



- EPSDT – Early and Periodic Screening, Diagnostic, and Treatment
- PCIC – Pierce County Immunization Coalition
- WCC – Well Child Check (same as Well Child Visit)
- HEDIS – Health Effectiveness Data & Information Set
- yo – year old(s)
- 4:3:1:3:3:1:4 – 4 DTaP, 3 IPV, 1 MMR, 3 Hib, 3HepB, 1 VZV, 1 PCV
- SMART – Specific, Measurable, Achievable, Relevant, Time bound
- CPE – Complete Physical Exam
- EHR – Electronic Health Record (EMR – Electronic Med Rec)
- WAIS (IIS) – WA State Immunization Information System
- IAC – Immunization Action Coalition
- ACIP – American Committee of Immunization Practices

History



- Community Health FQHC Clinic 2009
 - Transient, homeless, unengaged population
 - Low Combo 2/4:3:1:3:3:1:4 rates
 - Poor use from providers of IIS
 - Bad data in IIS (moved, incomplete)
 - Presidential challenge to improve – HP2010

Objectives

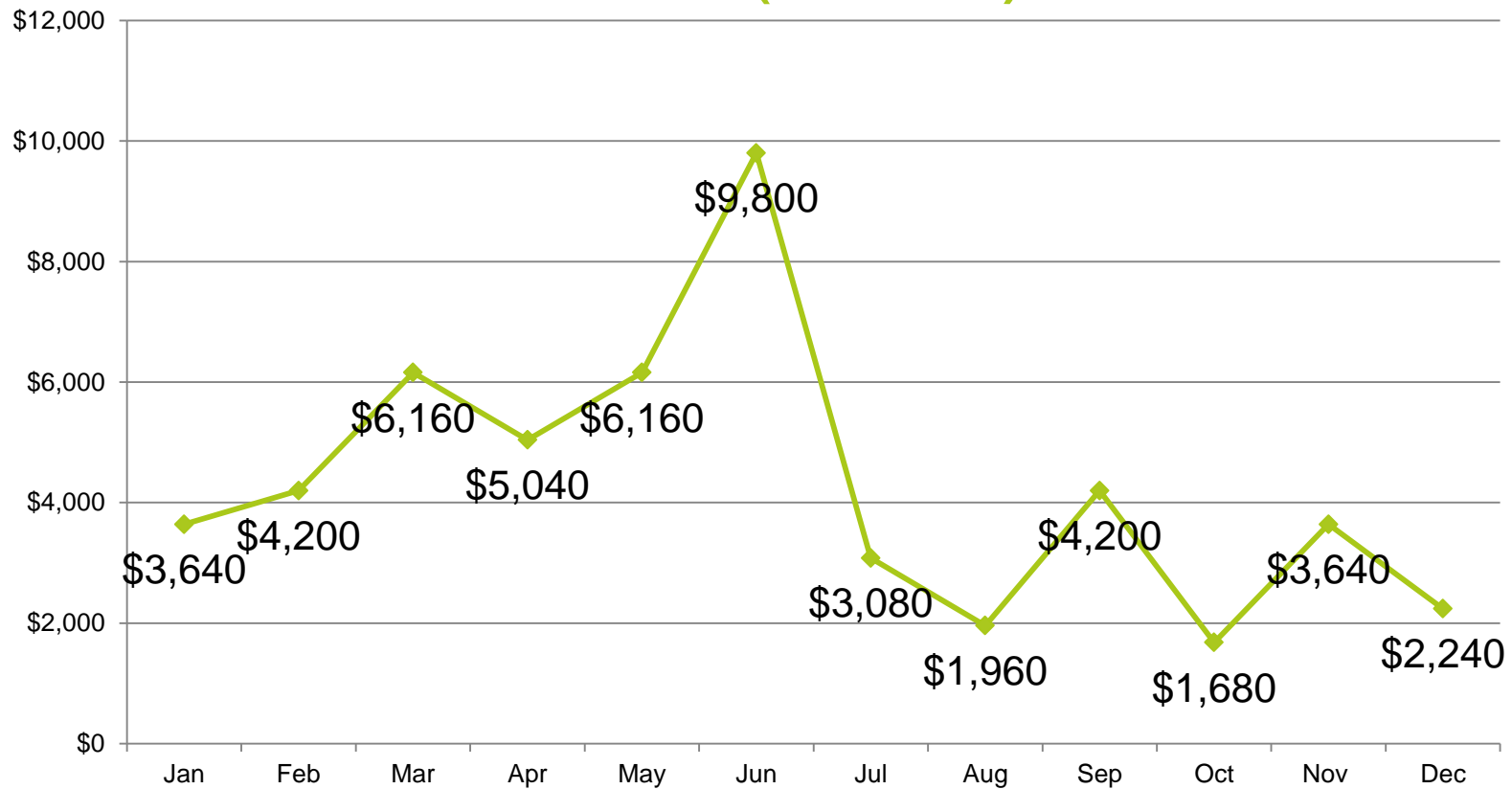


- Develop a goal plan (SMART goal planning)
- Identify or become a clinic process improvement champion
- Understand how to start the conversation with leadership
- Understand that culture change is *painful*
- Explain the purpose of reminder recall
- Create and sustain processes to improve immunization and HEDIS rates

Creating SUCCESS in your business while improving patient outcomes



Revenue increase after one intervention (2010)

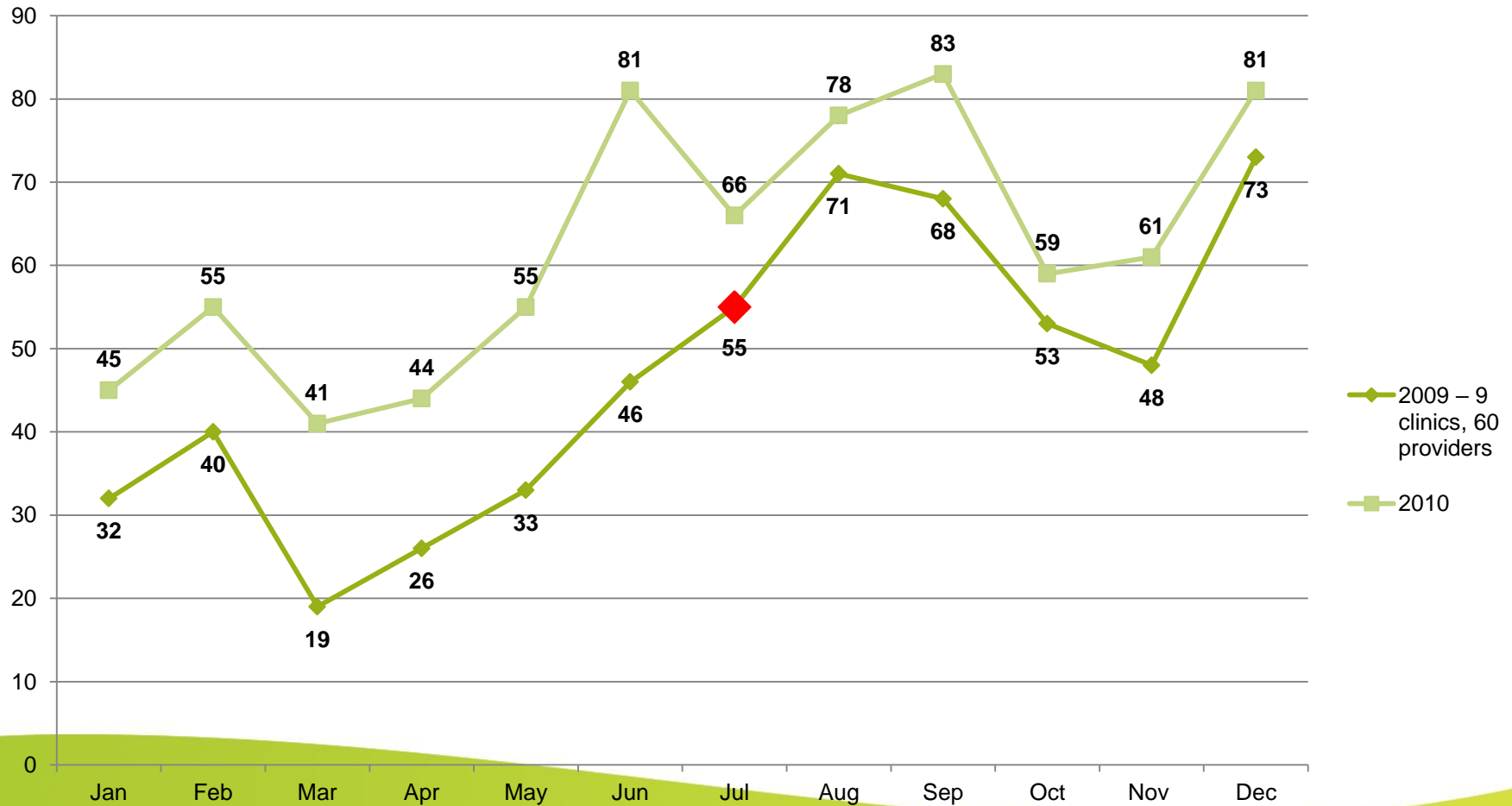


**Total increase in
revenue for one
intervention
and one year:
\$51,800**

**...and silly me, I did SIX
interventions in one year!**

**We billed an extra
\$250,000 to insurance
companies in 2010.**

Total number of 2 yo WCCs billed per month '09 and '10



Difference in billing by month for 2yo WCCs '09 and '10



Developing and Setting Goals

Developing your goal



- Develop your goal – (Specific, Measurable, Achievable, Relevant, Time Bound - SMART)
- Identify what you want to do with your data
 - Improve clinical processes
 - Improve preventive measure rates
 - Increase revenue

SMART goal

SMART Goals Worksheet



Draft Goal:

- I want to improve the immunization rates for 2 year olds 4 DTaP:3 IPV:1 MMR:3 HiB:3HepB:1 VZV:4 PCV (4:3:1:3:3:1:4)

| | <i>Answers at time of development</i> | <i>6 Month Update</i> |
|--|--|-----------------------|
| Specific <ul style="list-style-type: none"> What is the desired result? (who, what, when, why, how) | Improve rates for 2 year olds 4:3:1:3:3:1:4 using billing data to perform reminder recall | |
| Measurable <ul style="list-style-type: none"> How can you quantify (numerically or descriptively) completion? How can you measure progress? | Completion Report from WAIS Baseline then weekly reports during data scrub, then monthly | |
| Achievable <ul style="list-style-type: none"> What skills are needed? What resources are necessary? How does the environment impact goal achievement? Does the goal require the right amount of effort? | Recall technique Time – staff – outreach materials Minimal effort with maximum improvement potential | |
| Relevant <ul style="list-style-type: none"> Is the goal in alignment with the overall mission or strategy? | Aligns with Healthy People 2020, HEDIS, NCQA, Healthy Results Washington | |
| Time-bound <ul style="list-style-type: none"> What is the deadline? Is the deadline realistic? | Run reports, analyze data, and present to leadership every 90 days, 180 days, 270 days, 360 days | |

Final Goal: We will perform an outreach via phone to all patients between the ages of 17 – 22 months to inform about missing immunizations. Nurse visits will be offered and WCC appointments will be scheduled with the parents during the phone call. Additional WCC appointments will be added to the schedule...

Finding your champion

Finding your champion



- Leadership
 - Spokesperson, trainer, mentor, educator, SME
- Collaboration
 - Builds support and strengthens partnerships
 - Participates in committees, collaboratives, coalitions
- Innovation
 - Creative, innovative, flexible, critical thinker
 - Addresses challenge and easily applies new strategy
- Advocacy
 - Active in advancing new policies
 - Supports best practices

Making your case and changing the paradigm

Getting “buy in”



- After you have set your goals you will need the support of your leadership to implement and succeed with your new goals
 - Identify who in your organization will be able to execute policy changes
 - Set a meeting to present your goals and suggest a process to implement
 - Use current clinical statistics and show state / federal goals or rates

Changing the “policy”



- Identify existing processes and policies – update them first – if at all possible
- Write new policy if needed
 - Include purpose – to raise immunization rates
 - Include process – by using several methods – phone, email, letter
 - Include policy – *this* will happen monthly, quarterly, annually, etc.
 - Include rationale – why this process is important
- Use leadership to ensure adherence with the new policy – reward good practice

Changing the “culture”



- Understand that change, no matter how small, is uncomfortable – painful even – and most people will avoid it at all costs!
- Present behavior to change to the staff at an all staff meeting
- Share statistics
- Identify existing way, if any, as a broken process
- Implement changes *slowly*
- Continuous process check and adjust must occur to be successful

The Reminder Recall Process

Reminder recall



- Reminder recall is a process by which a medical office tracks a patient's preventive services, through an audit or report process, and if a missing service is identified, the patient is reminded the service is due via:
 - Phone calls
 - Email
 - Postcards
 - Letters

Reminder recall



- Process used for my intervention
 - 2 yo identified – missing one or more doses of series
 - All providers who saw children recorded a “personal” reminder / recall message
 - Patients were separated into PCP specific panels
 - Patient’s parent or guardian received automated call with a personal message from the child’s PCP

Data...data...data

Identify your data sources

- Identify where your data is going to be extracted from:
 - Patient Billing data
 - Electronic Health Records - report
 - Paper Health Records - audit
 - State Immunization Registry
 - Health Plan Portals / Member data

Scrub your data



- Start small – choose one process to change, then move onto next small change
 - Starting small and making small continuous changes improves the chances of the behavior becoming permanent, not just a task to do in the interim until management forgets and stops bugging me about it...
- Verify integrity of data
 - If you have an IT group this is easily done by data overlays
 - If you don't have an IT group – it's still easy, just a little more elbow grease is needed...

Example



- Goal – we will raise the rates of our 11-12 year olds for Tdap completion from 25% to 35%
 - Set a goal to complete verification of immunization status for all patients for 10 weeks
 - Run a report for missing Tdap for 11-12 year olds
 - Your clinic has 500 11-12
 - You have a staff of 5 (including you)
 - Give each person 10 patients each week to verify
 - Collect data every Monday
 - You will meet your goal in 10 weeks

Training

Training your staff



- Set up a (mandatory) lunch and learn
 - Train staff to audit medical records
 - Use one template or form to capture all data
 - Train staff to use / run reports through registries
 - Use the teach back method, model the behavior to be changed/adopted

Outreach and Interventions

Contact your patients



- Email, letter, or postcard
- Phone call, text message
- Auto dialer
- Social Media – let patients know you are having a “Tdap Campaign” and challenge them to come in and get their vaccine

Improving Access



- Be flexible with patient access to nurse appointments, physician appointments
- Have a weekend clinic
- Open some special evening hours for a limited time
- Restructure how appointments are made – identify specific afternoons for a marathon Well Child Check day

Creating Success and Sustainable Processes

Rates Will Improve



- Run rates again, again, and again!
 - Constant review of rates is paramount to success
- Review your clean data – helps show value of the hard work put into the intervention
- Share successes
- Identify opportunities for process improvement

Creating Success and Sustainable Processes



- Train, train, and retrain Staff
- Touchback method – no less than quarterly *after* pilot two years complete
- Policy adherence – re-evaluate annually
- Positive reinforcement and engagement
 - Institute friendly competition
- Write down your processes! Create workflows and algorithms



Thank You



I am so happy to be able to share this information with you. If you are interested, please contact me for one on one mentoring or consultation.

Contact Information



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