Thank you for joining

The presentation will begin shortly
Rise to Immunize®
Monthly Webinar

Immunization Access, On Patient Time
Wendy Goulet and Mandy Kelsay, St. Elizabeth Physicians
Today’s Webinar

Campaign Updates
• HPV Study
• RIZE Action Month
• RIZE Symposium
• Blinded Comparative Report

Immunization Access, On Patient Time
• Wendy Goulet
• Mandy Kelsay

Q&A Session
Webinar Reminders

Today’s webinar recording will be available the week of 09/25

- Will be sent via email
- Will be available on website

(RiseToImmunize.org → “Resources” → “Webinars”)

Ask questions during the webinar using the Q&A feature

- Questions will be answered at the end of the presentation
Working Together to End HPV Cancers: NIH Studies

- 2 implementation studies of new HPV vaccination improvement strategies targeting children 11–17
- Recruiting 6 to 12 organizations
- Commit to engage 8 to 12 pediatric or family medicine practices
- Organization/clinic stipends ~$10–$30K

More Information at research@amga.org
This year, we engaged over 600 healthcare professionals from 28 AMGA member groups during RIZE Action Month!
If you plan on staying at the Ritz-Carlton, please make your reservation by September 30 to receive the discounted room rate.
## Year 2 Data

<table>
<thead>
<tr>
<th>Description</th>
<th>Number</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total vaccines administered or documented in <strong>Year 2</strong></td>
<td><strong>6,045,852</strong></td>
</tr>
<tr>
<td>(Q3 2022 - Q2 2023)</td>
<td></td>
</tr>
<tr>
<td>Total vaccines administered or documented in <strong>Year 1 and Year 2 combined</strong></td>
<td><strong>11,938,960</strong></td>
</tr>
<tr>
<td>(Q3 2021 – Q2 2023)</td>
<td></td>
</tr>
</tbody>
</table>
Today's Speakers

Wendy Goulet
Process Improvement Consultant, St. Elizabeth Physicians

Mandy Kelsay
Optimization Manager, St. Elizabeth Physicians
IMMUNIZATION ACCESS, ON PATIENT TIME

Mandy Kelsay, CBO Optimization Manager
Wendy Goulet, Process Improvement Consultant
Prior to the Immunization Scheduling Project

- Extended time to schedule
- Duplicative information sharing
- Increased workload for office associates
- Lack of auto-search functionality
- Lack of standardization
- Complex scheduling process
- Decreased patient satisfaction
CURRENT STATE

- Patient reaches Call Center during business hours
- Call Center transfers to practice or takes message
- PSR or MA takes the call or reviews message
- Provider possibly receives message
- PSR/MA contacts the patient or leaves a message with provider feedback or to schedule

Patient returns call to Call Center

- Call Center transfers to practice or takes message
- PSR or MA takes the call or reviews message
- Provider possibly receives message
- PSR/MA contacts the patient or leaves a message with provider feedback or to schedule
IMMUNIZATION SCHEDULING OBSTACLES

- **NO UNIVERSAL EPIC TEMPLATE**
  - Not all practices utilize the Nurse Schedule
  - Some practices schedule in advance, some prefer walk-in’s
  - Confusing nomenclature of practice nurse schedules

- **CHART AUDIT REQUIRED**
  - To determine who is eligible and when
  - Some providers require an initial written order vs. co-sign

- **CALL CENTER AND CENTRAL TEAMS UNABLE TO SCHEDULE FLU SHOTS**
  - Different amounts of doses received by different practices at different times
  - Unable to notify call center/central teams of vaccine supply shortage

- **ENDLESS PHONE LOOP**
  - 4 – 5 minutes required to schedule a flu shot
  - Patients experience a vicious cycle of phone tag
  - Representatives available to schedule only during business hours

- **VARIABILITY IN VACCINE RECEIPT**
<table>
<thead>
<tr>
<th>Dept / Office</th>
<th>Current Nurse Schedule Narr</th>
</tr>
</thead>
<tbody>
<tr>
<td>Alexandria PC</td>
<td>SEP Nurse Alex &amp; SEP Lab Alex</td>
</tr>
<tr>
<td>Aurora PC</td>
<td>SEP Aurora Nurse</td>
</tr>
<tr>
<td>Bellevue PC</td>
<td>SEP Nurse Bell</td>
</tr>
<tr>
<td>Butler PC</td>
<td><strong>SEP Lab Pend</strong></td>
</tr>
<tr>
<td>Covington IM</td>
<td>SEP IMCov Nurse</td>
</tr>
<tr>
<td>Covington PC</td>
<td>SEP Nurse Cov</td>
</tr>
<tr>
<td>Crittenden PC</td>
<td>SEP Nurse Crit</td>
</tr>
<tr>
<td>Florence Ewing PC</td>
<td>SEP Nurse Flo</td>
</tr>
<tr>
<td>Florence Turfway PC</td>
<td>Walk In</td>
</tr>
<tr>
<td>Fort Mitchell PC</td>
<td>SEP Nurse Ft. Mitchell</td>
</tr>
<tr>
<td>Greendale PC</td>
<td>SEP Greendale PC Nurse</td>
</tr>
<tr>
<td>Hebron Conner PC</td>
<td>SEP Nurse Heb 2</td>
</tr>
<tr>
<td>Newport/Fort Thomas PC</td>
<td>SEP FTT PC Nurse</td>
</tr>
<tr>
<td>Union Mt. Zion PC</td>
<td>SEP Nurse Union</td>
</tr>
</tbody>
</table>
GOALS

- Standardize department nurse templates
- Create and hardwire workflows to allow practices and central support teams to schedule immunizations through one-call resolution
- Guide scheduling in complicated workflow with use of Epic Decision Trees
- Expand scheduling functionality to MyChart patient portal
- Allow for easy cross training and onboarding for associates and managers
- Improve patient experience
Transition to Decision Tree

**Users Involved**
- Practice & Patient Access Associates
- Practice Physicians & Managers
- IT Manager & Cadence Build Team
- Population Health Manager
- Director of Operations – Admin & Physician
- Call Center Associates
- Optimization Manager & Process Improvement Consultant

**Build Prep**
- Process Workflow
- Visio Workflow Diagram
- Spreadsheet(s)
Nurse Template Standardization

**SEP Primary Care Nurse Template for Immunizations**

There are two choices for how immunizations can be scheduled onto your departments’ nurse template:

1. Into open slots
   OR
2. Into blocked slots (blocks: Immunization, MyChart Immunization, Flu Shot)

If you select option 2-blocked slots, you will need to use all three blocks related to immunization when editing the nurse template and ensure that at least 50% of your available nurse template is blocked for immunizations.

**Terms/Definitions**

**Blocks:** a placeholder in the template that is typically linked to a visit type and is specific to a date and/or time.

<table>
<thead>
<tr>
<th>Time</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>1:00pm</td>
<td>Immunization, Flu Shot, MyChart Immunization</td>
</tr>
<tr>
<td>1:10pm</td>
<td>Immunization, Flu Shot, MyChart Immunization</td>
</tr>
<tr>
<td>1:20pm</td>
<td>Immunization, Flu Shot, MyChart Immunization</td>
</tr>
<tr>
<td>1:30pm</td>
<td>Immunization, Flu Shot, MyChart Immunization</td>
</tr>
<tr>
<td>1:40pm</td>
<td>Immunization, Flu Shot, MyChart Immunization</td>
</tr>
<tr>
<td>1:50pm</td>
<td>Immunization, Flu Shot, MyChart Immunization</td>
</tr>
<tr>
<td>2:00pm</td>
<td>Immunization, Flu Shot, MyChart Immunization</td>
</tr>
<tr>
<td>2:10pm</td>
<td>Immunization, Flu Shot, MyChart Immunization</td>
</tr>
</tbody>
</table>

**Open slot:** a slot on a template that has no blocks or exceptions.
## Nurse Template Nomenclature Standardization

<table>
<thead>
<tr>
<th>Current Nurse Schedule Narr</th>
<th>Suggesting replacing With</th>
</tr>
</thead>
<tbody>
<tr>
<td>SEP Nurse Alex &amp; SEP Lab Alex</td>
<td>SEP Nurse Alexandria PC</td>
</tr>
<tr>
<td>SEP Aurora Nurse</td>
<td>SEP Nurse Aurora PC</td>
</tr>
<tr>
<td>SEP Nurse Bell</td>
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<td>SEP Nurse Hebron Conner PC</td>
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<td>SEP Nurse Newport/Fort Thomas PC</td>
</tr>
<tr>
<td>SEP Nurse Union</td>
<td>SEP Nurse Union Mt. Zion PC</td>
</tr>
</tbody>
</table>
OUTCOME

- Builder validation
- User validation
- Pilot

- Open line for end-user feedback

- Support updates post go-live
- PRN and year over year

Testing

Go Live

Updates
Decision Tree Algorithm
### Decision Tree

<table>
<thead>
<tr>
<th>Reason for Nurse Visit:</th>
<th>☐ In Office Immunization</th>
<th>☐ COVID-19 Testing (Office Use Only)</th>
<th>☐ Community Event</th>
<th>☐ Other</th>
</tr>
</thead>
<tbody>
<tr>
<td>You are overdue or eligible for your flu vaccine. Would you like to schedule your flu vaccine? You may also receive other immunizations that you might be due for at this same visit.</td>
<td>☑ Yes</td>
<td>☐ No</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Are you sick today with moderate/severe illness or fever? It is recommended to delay vaccination until the patient is recovered from any active infection.</td>
<td>☐ Yes</td>
<td>☑ No</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

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**Instructions:**
- Overdue or eligible to schedule:
  - Flu Vaccine
  - COVID-19 Vaccine – Due date: 11/8/2021
  - HEP B – Due date: 11/26/1963

SEP Central teams may schedule for any combination of Flu, COVID-19, 2nd Hep A, 2nd HPV, and Hep B if the patient is overdue or eligible. Eligible means the patient is within 3 months of being overdue, or within one month of being overdue for the flu, however, the appointment must be scheduled on or after the patient becomes overdue. If the patient wishes to also receive an immunization that is not on the list above along with the listed immunization(s), you may continue scheduling and simply add that information to the appointment notes.

**Appointment Notes:** In appt notes, include the name of the immunization(s)

**Visit:** IMMUNIZATIONS (replace the original visit type)

**Tags:** Flu Shot
• Decreased average schedule time from 4 minutes to 1.25 minutes, during the first two weeks of the pilot.
• Decreased calls transferred to practice by 6,743
MyChart Immunization Appointments

- **2021**: Total 1505, Completed 930, Canceled 206, No Show 206
- **2022**: Total 4273, Completed 2435, Canceled 564, No Show 206
- **2023 (Current)**: Total 3553, Completed 1286, Canceled 48, No Show 48
- **2023 (Projection)**: Total 2075, Completed 1075, Canceled 403, No Show 403
Primary Care Nurse Visit Decision Tree Stats

- 9 Decision Trees
- 30 Shared Rules
- 16 Shared Questions
- 10 SmartTexts (Instructions)

YOU GET AN APPOINTMENT!
LESSONS LEARNED

• Balance customer expectations for access (availability, technology) with provider and practice preferences and capabilities.

• Organization is crucial!

• Not all immunizations are permitted to be scheduled by this workflow:
  • Payor limitations (Medicare D requires Tdap administration at the pharmacy)
  • Provider hesitancy (buy-in)

• Patients will be able to schedule inappropriately at times if directions are not followed
Sustainability through ownership

**Sustainability Plan**

**PURPOSE**
- Outlines how your project will survive in the long term.
- Provides Owner and Executive Sponsor reassurance that results will have a long-lasting impact.
- Provides direction on how the results of the project should be incorporated into standard work.

<table>
<thead>
<tr>
<th>Project Name:</th>
<th>Primary Care Nurse Visit Template</th>
</tr>
</thead>
<tbody>
<tr>
<td>Project Role</td>
<td></td>
</tr>
<tr>
<td>Owner</td>
<td>Mandy Kelsay, Manager</td>
</tr>
<tr>
<td>Next Level Supervisor</td>
<td>Denise Miller, Administrator</td>
</tr>
<tr>
<td>Exec Sponsor</td>
<td>Hank Kerschen, VP</td>
</tr>
<tr>
<td></td>
<td>Department</td>
</tr>
<tr>
<td>Owner</td>
<td>CBO Rev Cycle Training</td>
</tr>
<tr>
<td>Next Level Supervisor</td>
<td>CBO Rev Cycle Training</td>
</tr>
<tr>
<td>Exec Sponsor</td>
<td>Clinical Transformation</td>
</tr>
<tr>
<td>#</td>
<td>Task/Goal</td>
</tr>
<tr>
<td>----</td>
<td>---------------------------------------------------------------------------</td>
</tr>
<tr>
<td>1</td>
<td>Goal: Primary Care practices (supported by the Call Center) are in compliance of having minimum of 50 percent of available appointments on Nurse Visit template designated for Immunizations, MyChart Immunizations and Flu Shot visit type blocks on a designated open template.</td>
</tr>
<tr>
<td>2</td>
<td>Task: Review any additions/changes that are recommended/requested.</td>
</tr>
<tr>
<td>3</td>
<td>Task: Process maintenance. Ensure the process reflects best practices and operational needs</td>
</tr>
<tr>
<td>4</td>
<td>Task: Implement Nurse Visit Template workflows as practices go live with call center support. Educate and update Practice Managers on Nurse Visit template expectations and workflows.</td>
</tr>
</tbody>
</table>
NEXT STEPS

• Further develop the nurse visit decision tree to:
  • Allow for greater quantity of immunizations
  • Continue to engage providers
• Incorporate additional opportunities by adding avenues for scheduling:
  • IRIS exams
  • Monofilament
• Explore opportunities for decision trees for specialty practices
• Implement better technology resources
  • Inventory Management system that integrates with EPIC
QUESTIONS?
THANK YOU

MANDY KELSAy – MANDY.KELSAy@STELIZABETH.COM
WENDY GOULET- WENDY.GOULET@STELIZABETH.COM
Upcoming Webinar

Topic: Promoting Health Equity in Adult Immunizations

Date/ Time: **Thursday, October 19 at 2pm ET**

Presenters: Victoria Smith, MD, FAAFP, and Matthew Malachowski, PharmD, MHA, BCPS from Ochsner Health
Questions?

Submit your questions using the Q&A feature at the bottom of the screen.