

# **Thank you for joining**

The presentation will  
begin shortly

# Rise to Immunize<sup>®</sup> Monthly Webinar

**Immunization Access, On Patient Time**

Wendy Goulet and Mandy Kelsay, *St. Elizabeth Physicians*

# Today's Webinar

## Campaign Updates

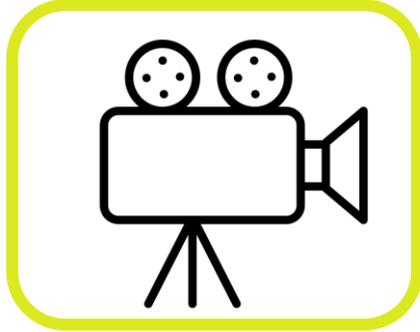
- HPV Study
- RIZE Action Month
- RIZE Symposium
- Blinded Comparative Report

## 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](mailto:research@amga.org)





# RIZE Symposium



November 9–10, 2023  
Arlington, VA

[RiseToImmunize.org/Symposium](https://RiseToImmunize.org/Symposium)

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



Total vaccines administered  
or documented in Year 2  
(Q3 2022 - Q2 2023)

6,045,852

Total vaccines administered  
or documented in Year 1  
and Year 2 combined  
(Q3 2021 - Q2 2023)

11,938,960

# Today's Speakers



**Wendy Goulet**

Process Improvement Consultant, *St. Elizabeth Physicians*



**Mandy Kelsay**

Optimization Manager, *St. Elizabeth Physicians*



**St. Elizabeth**  
PHYSICIANS

## **IMMUNIZATION ACCESS, ON PATIENT TIME**

**Mandy Kelsay, CBO Optimization Manager**

**Wendy Goulet, Process Improvement Consultant**

# BACKGROUND



# BACKGROUND

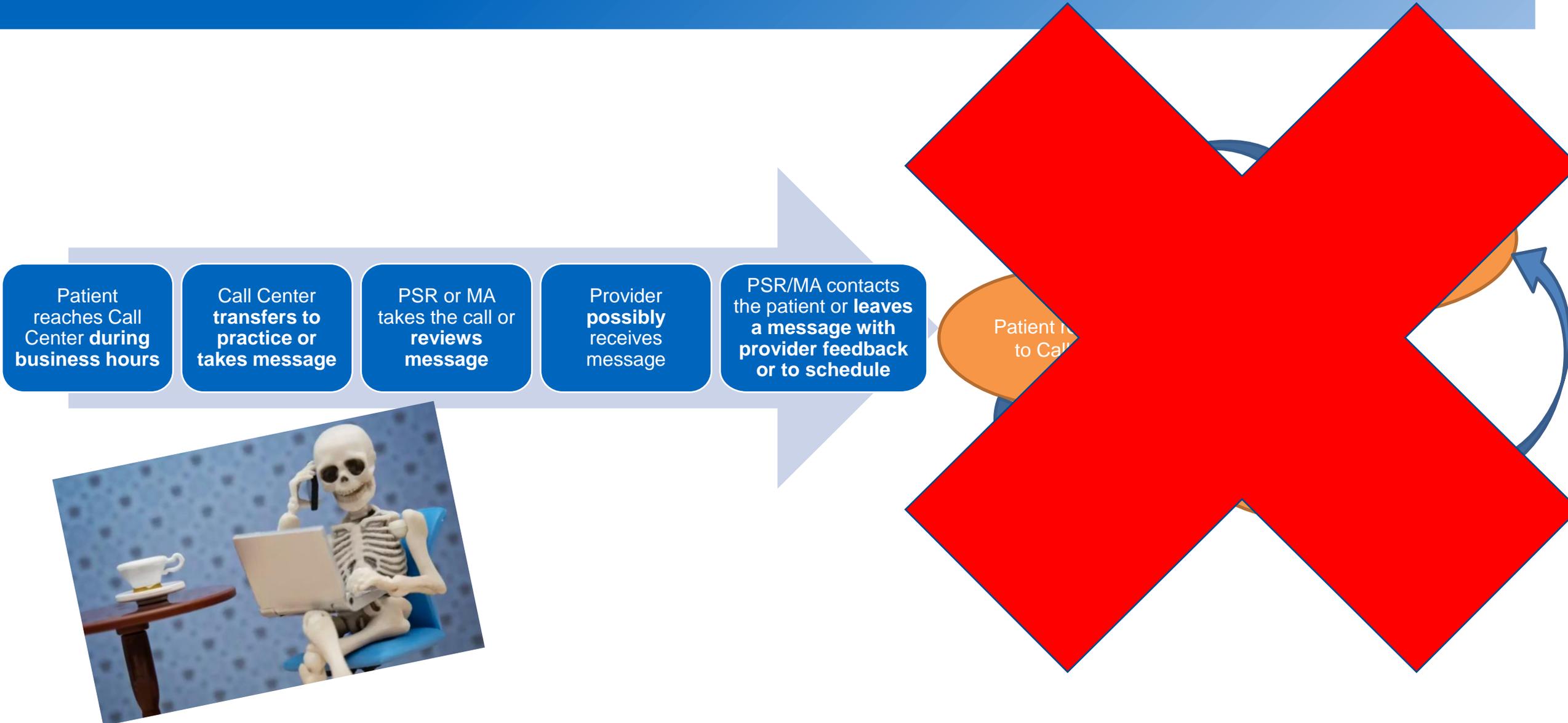
## Prior to the Immunization Scheduling Project

- 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

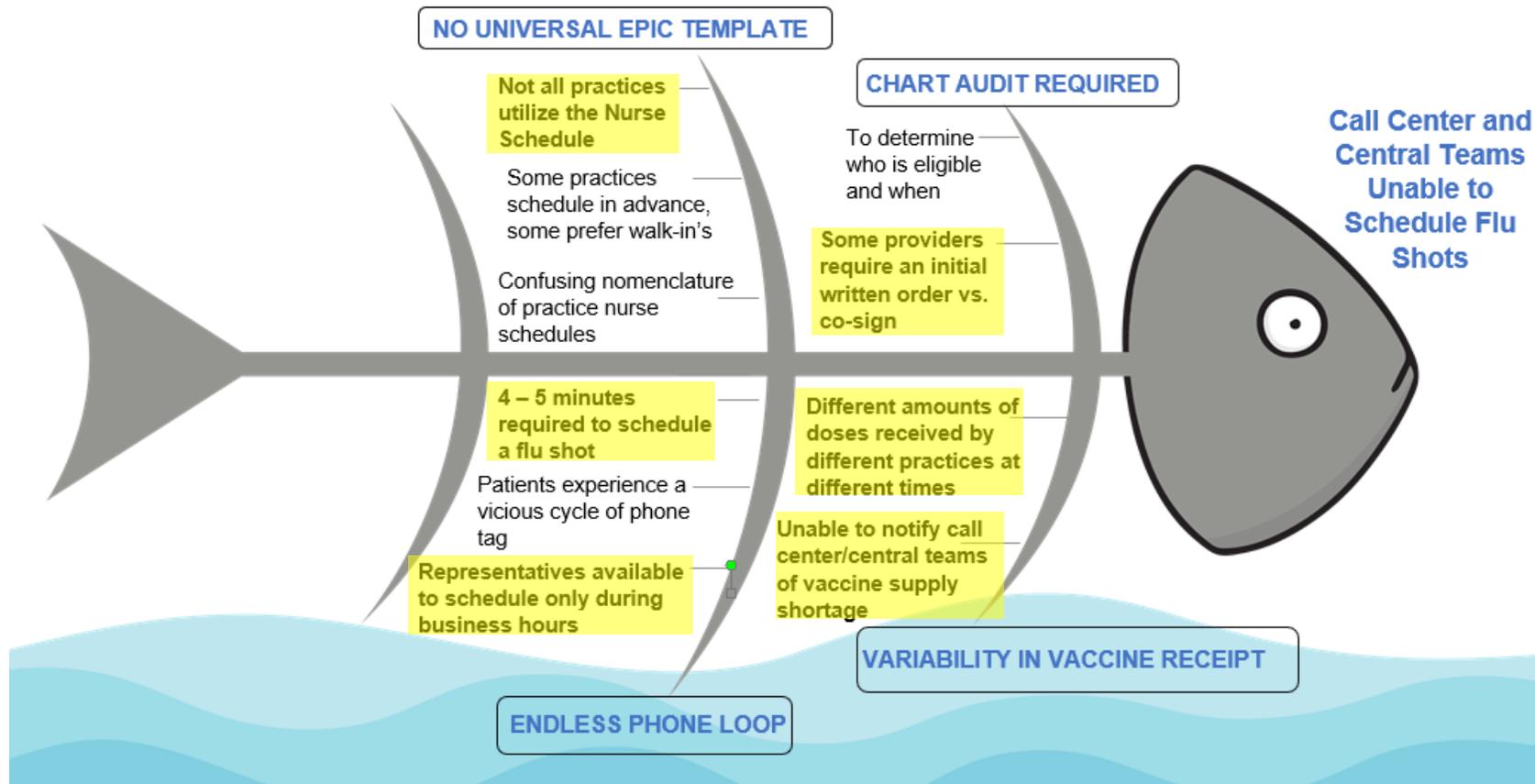
Trying to schedule an appointment for my flu vaccine.



# CURRENT STATE



## IMMUNIZATION SCHEDULING OBSTACLES

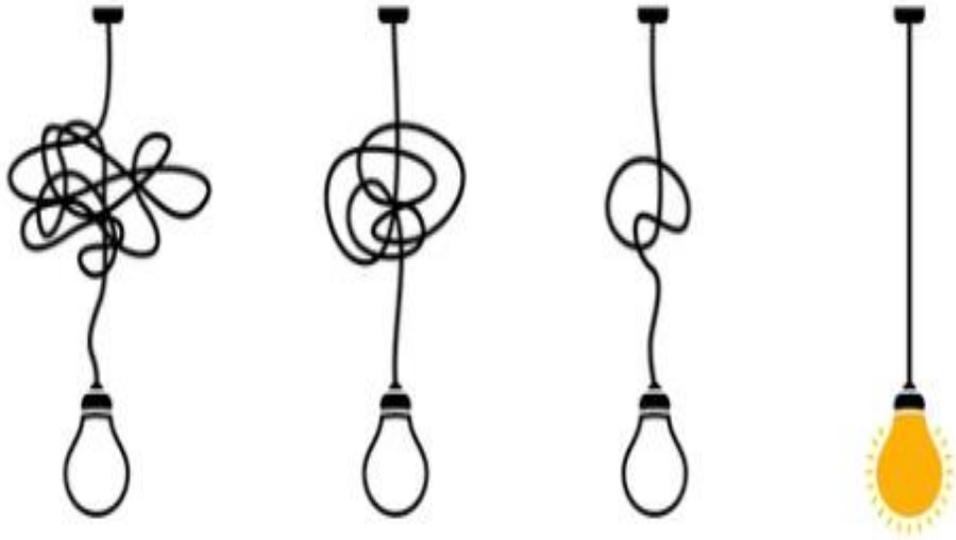


# ANALYSIS

Dept / Office	Current Nurse Schedule Narr
Alexandria PC	SEP Nurse Alex & SEP Lab Alex
Aurora PC	SEP Aurora Nurse
Bellevue PC	SEP Nurse Bell
Butler PC	SEP Lab Pend
Covington IM	SEP IMCov Nurse
Covington PC	SEP Nurse Cov
Crittenden PC	SEP Nurse Crit
Florence Ewing PC	SEP Nurse Flo
Florence Turfway PC	Walk In
Fort Mitchell PC	SEP Nurse Ft. Mitchell
Greendale PC	SEP Greendale PC Nurse
Hebron Conner PC	SEP Nurse Heb 2
Newport/Fort Thomas PC	SEP FTT PC Nurse
Union Mt. Zion PC	SEP Nurse Union



# 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

# INTERVENTION

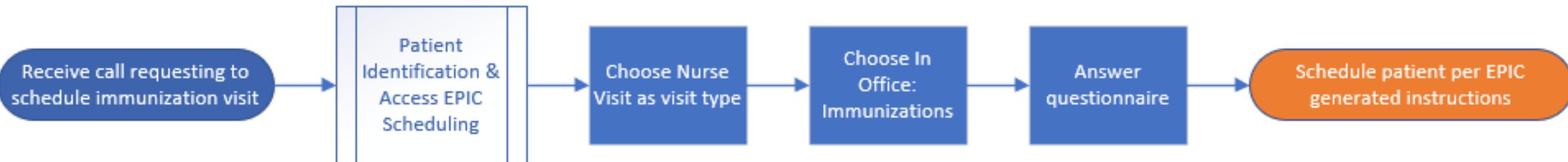
## Transition to Decision Tree

- **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)**



# INTERVENTION

## Nurse Template Standardization

### SEP Primary Care Nurse Template for Immunizations

There are two choices for how immunizations [17] 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.

1:00pm	Immunization, Flu Shot, MyChart Immunization
1:10pm	Immunization, Flu Shot, MyChart Immunization
1:20pm	Immunization, Flu Shot, MyChart Immunization
1:30pm	Immunization, Flu Shot, MyChart Immunization
1:40pm	Immunization, Flu Shot, MyChart Immunization
1:50pm	Immunization, Flu Shot, MyChart Immunization
2:00pm	Immunization, Flu Shot, MyChart Immunization
2:10pm	Immunization, Flu Shot, MyChart Immunization

**Open slot:** a slot on a template that has no blocks or exceptions.

1:00pm	
1:10pm	
1:20pm	
1:30pm	
1:40pm	
1:50pm	
2:00pm	
2:10pm	

# INTERVENTION

## Nurse Template Nomenclature Standardization

Current Nurse Schedule Narr <input type="checkbox"/>	Suggesting replacing With <input type="checkbox"/>
SEP Nurse Alex & SEP Lab Alex	SEP Nurse Alexandria PC
SEP Aurora Nurse	SEP Nurse Aurora PC
SEP Nurse Bell	SEP Nurse Bellevue PC
SEP Lab Pend 	SEP Nurse Butler PC
SEP IMCov Nurse	SEP Nurse Covington IM
SEP Nurse Cov	SEP Nurse Covington PC
SEP Nurse Crit	SEP Nurse Crittenden PC
SEP Nurse Flo	SEP Nurse Florence Ewing PC
Walk In	SEP Nurse Florence Turfway PC
SEP Nurse Ft. Mitchell	SEP Nurse Fort Mitchell PC
SEP Greendale PC Nurse	SEP Nurse Greendale PC
SEP Nurse Heb 2	SEP Nurse Hebron Conner PC
SEP FTT PC Nurse	SEP Nurse Newport/Fort Thomas PC
SEP Nurse Union	SEP Nurse Union Mt. Zion PC

# OUTCOME

- Builder validation
- User validation
- Pilot

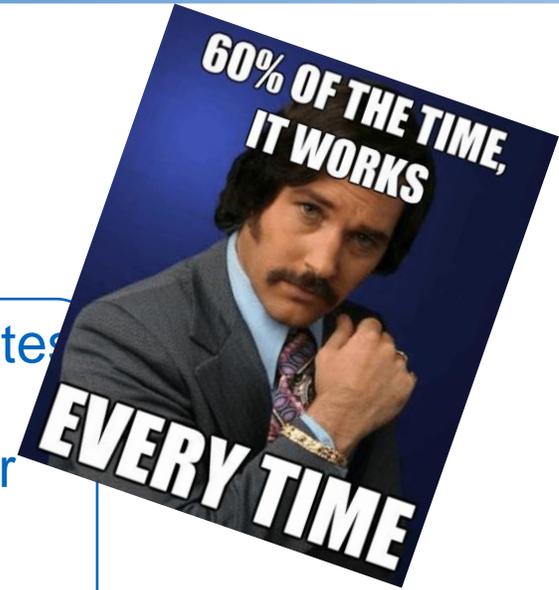
## Testing

## Go Live

- Open line for end-user feedback

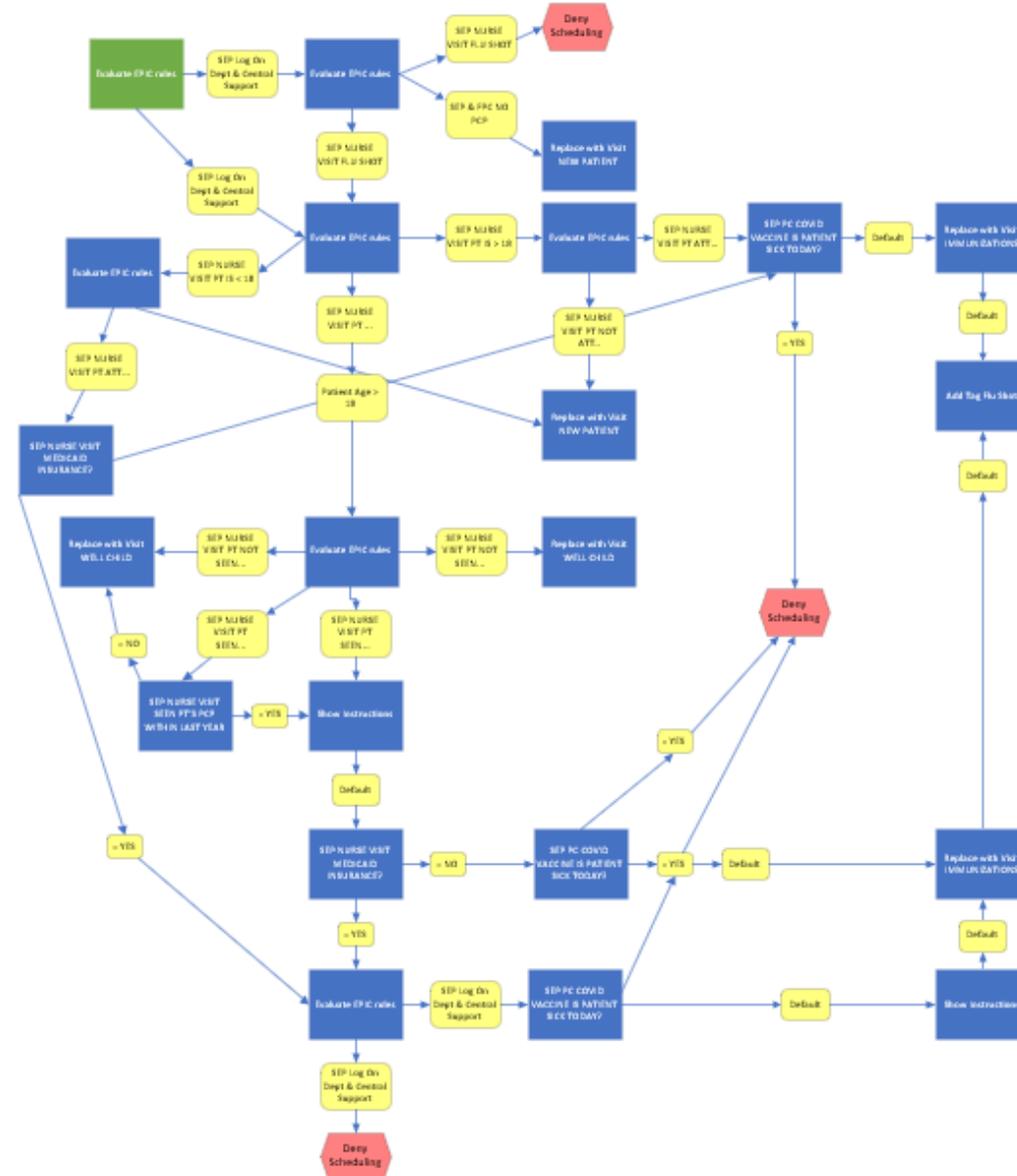
- Support updates post go-live
- PRN and year over year

## Updates



# OUTCOME

## Decision Tree Algorithm



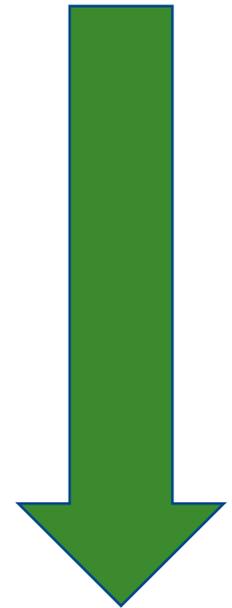
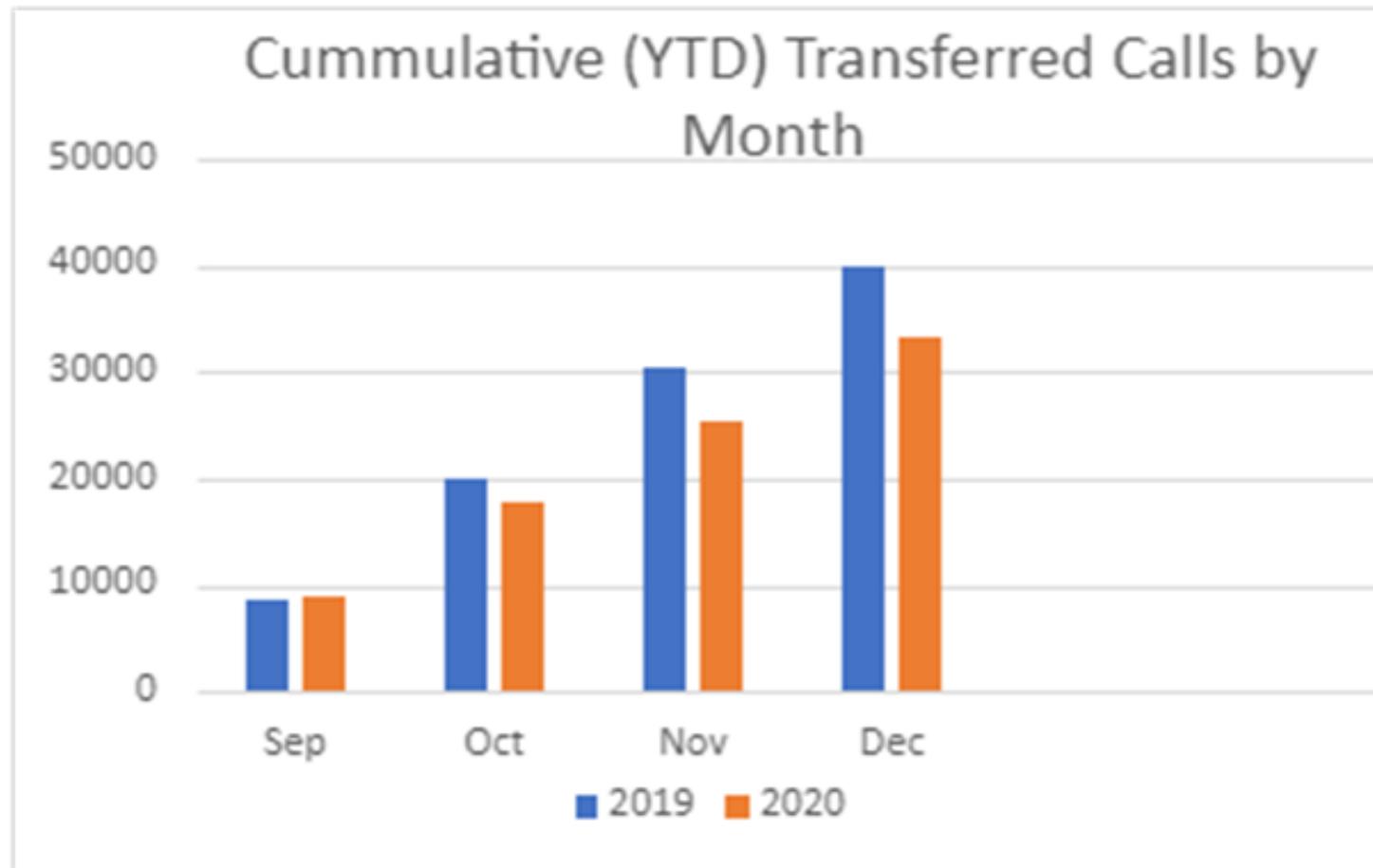
# OUTCOME

## Decision Tree

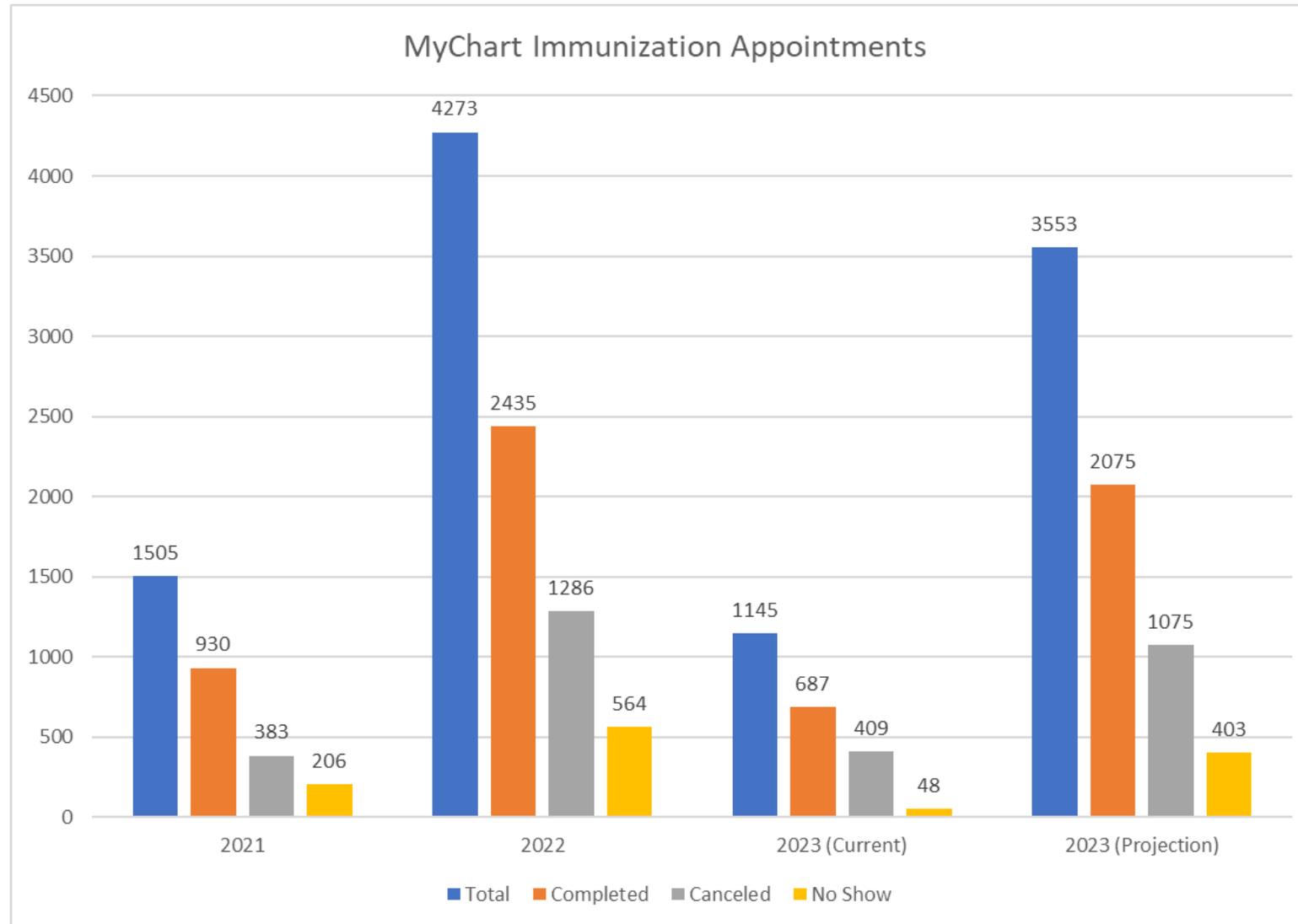
Decision Tree for Nurse Visit	
Reason for Nurse Visit:	<input checked="" type="checkbox"/> In Office Immunization <input type="checkbox"/> COVID-19 Testing (Office Use Only) <input type="checkbox"/> Community Event <input type="checkbox"/> Other
You are overdue or eligible for your flu vaccine. Would you like to schedule your flu vaccine? You may also receive other immunizations that you might be due for at this same visit.	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Are you sick today with moderate/severe illness or fever? <i>It is recommended to delay vaccination until the patient is recovered from any active infection.</i>	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No
Results – Follow Instructions	
<b>Instructions:</b> Overdue or eligible to schedule:	
<b>Flu Vaccine</b> <b>COVID-19 Vaccine – Due date: 11/8/2021</b> <b>HEP B – Due date: 11/26/1963</b>	
<i>SEP Central teams may schedule for any combination of Flu, COVID-19, 2<sup>nd</sup> Hep A, 2<sup>nd</sup> 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.</i>	
<b>Appointment Notes:</b> In appt notes, include the name of the immunization(s)	
<b>Visit:</b> IMMUNIZATIONS (replace the original visit type)	
<b>Tags:</b> Flu Shot	
<input checked="" type="checkbox"/> Apply <input type="checkbox"/> Discard Tree	

# OUTCOME

- 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



# OUTCOME



# OUTCOME

## Primary Care Nurse Visit Decision Tree Stats

9 Decision  
Trees

30 Shared  
Rules

16 Shared  
Questions

10  
SmartTexts  
(Instructions)



# 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



# HARDWIRE AND SUSTAIN

## 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.

<b>Project Name:</b>	<b>Primary Care Nurse Visit Template</b>			
<b>Project Role</b>	<b>Name</b>	<b>Department</b>	<b>Signature</b>	<b>Date</b>
Owner	Mandy Kelsay, Manager	CBO Rev Cycle Training		
Next Level Supervisor	Denise Miller, Administrator	CBO Rev Cycle Training		
Exec Sponsor	Hank Kerschen, VP	Clinical Transformation		

# HARDWIRE AND SUSTAIN

#	Task/Goal	Activity	Responsible [Job Title]	Department	Frequency	Metric	Target	Source	Trigger to Investigate	Mitigation Strategy
1	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 or a designated open template.	Receive Nurse Template Block report	CBO Optimization Manager	CBO Rev Cycle Training	Monthly	≥ 50% of Nurse Visit Template blocked for Immunization, MyChart Immunization and Flu Shot visit types or maintain open schedule	100%	Nurse Template Blocks Report (manually pushed to CBO Optimization Manager and SEP Billing Trainer monthly with annual lookforward)	Practice identified as having less than 50% of Nurse Visit Template blocked for Flu Shot, MyChart Imm, and Immunization	Audit practice's Nurse Schedule Template for compliance. If template is non-compliant, contact Practice Manager to notify. Discuss options to assist with updating to meet compliance. Email Director of Operations if PM is resistant to compliance. Review with Executive team if multiple sites continue to have issues despite interventions from DO.
2	Task: Review any additions/changes that are recommended/requested	Determine if additions/changes are necessary and approved for Standardization Meeting agenda	CBO Optimization Manager	CBO Rev Cycle Training	Quarterly	Pass/Fail	Pass	Standardization Meeting	Additions/Changes requested or identified for Nurse	Contact stakeholder to review current state and determine needs for future state
3	Task: Process maintenance	Ensure the process reflects best practices and operational needs	CBO Optimization Manager	CBO Rev Cycle Training	At least annually	Pass/Fail	Pass	Standard Work instruction located on Leadership Toolbox.	Instructions no longer consistent with best practice workflow	Review identified changes/updates with next-level supervisor, exec sponsor, and other impacted stakeholders. Make approved changes. Work with next-level supervisor and exec sponsor on a communication plan for changes.
4	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	CBO Optimization Manager	CBO Rev Cycle Training	Adhoc	Pass/Fail	Pass	Meet 1:1	Go live scheduled date for Call Center Support	Schedule and meet 1:1 with Practice Manager
5										
6										

# 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

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WENDY GOULET- [WENDY.GOULET@STELIZABETH.COM](mailto: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