

# THE FIRST 48

## Kaiser Permanente South Bay Home Health Intake Improvement

- Project Manager Danielle Franklin, MSOD
- Home Health and Hospice Service Director Susan B. Sanfacon, MBA, BSN, RN

### Aim Statement

Increase % of Kaiser Permanente Santa Clara, San Jose, and Redwood City Home Health patients who receive their start of care visit within 48 hours from an average of 64% to 95% by September 30, 2018.

### Service Area



**BRANCH**  
Kaiser Foundation Hospitals  
Redwood City Home Health  
**2,700 referrals a year**

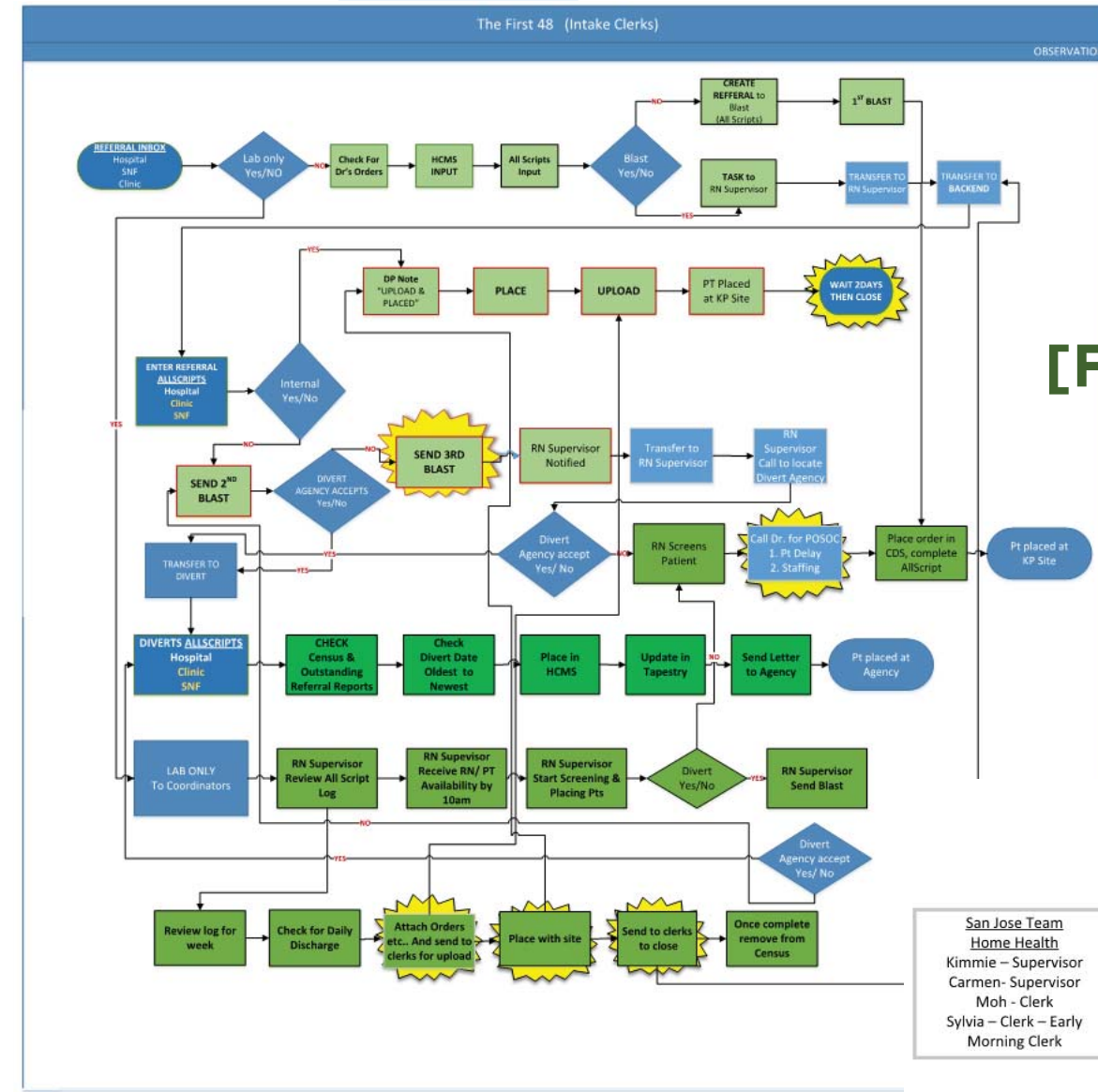
### with Referral Volume

**PARENT**  
Kaiser Foundation Hospitals  
Santa Clara Home Health  
**7,500 referrals a year**

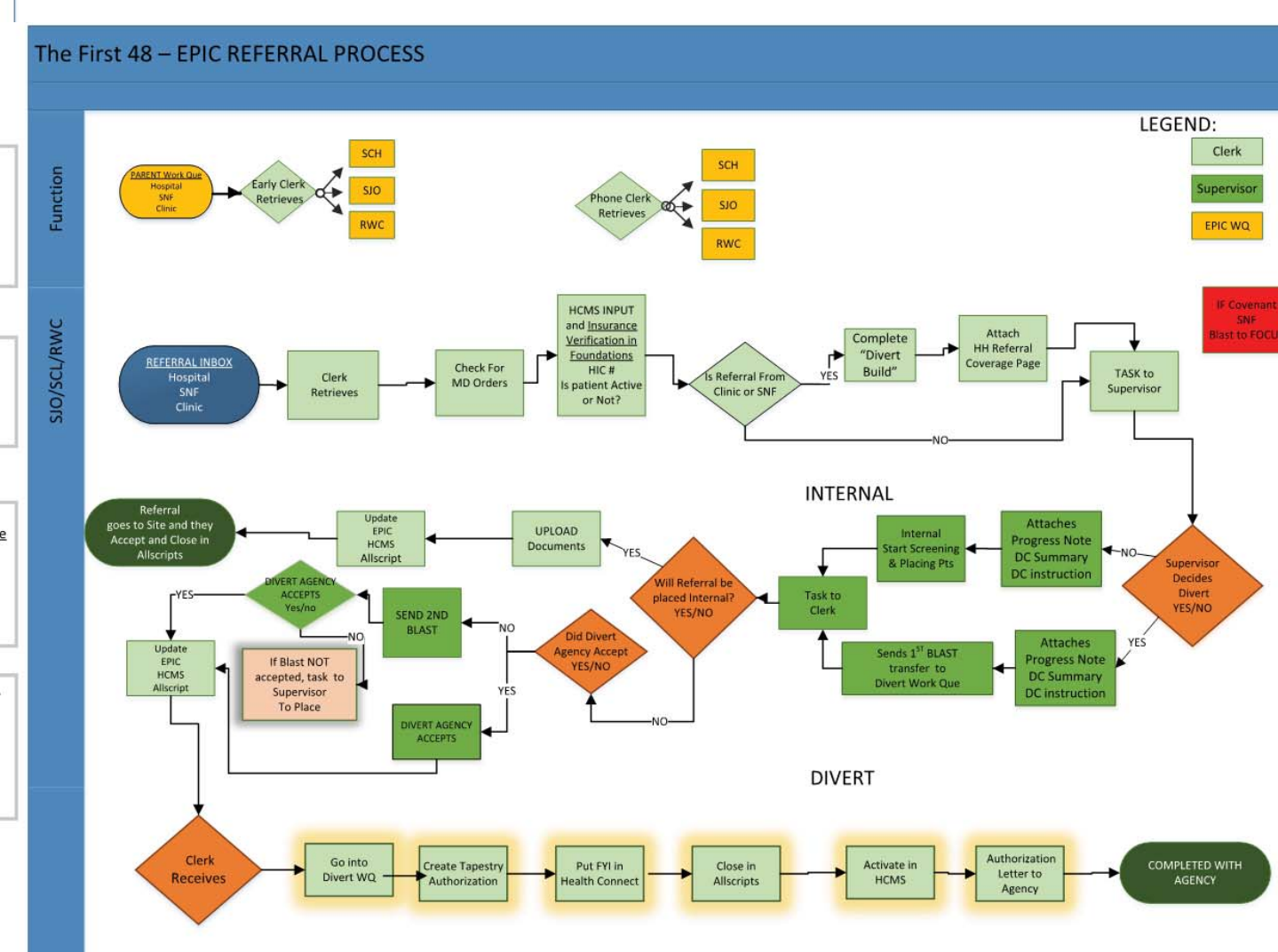


**BRANCH**  
Kaiser Foundation Hospitals  
San Jose Home Health  
**6,100 referrals a year**

### Project Design/Strategy



[Figure 1]



[Figure 2]

Our observations revealed six underlying issues as barriers to meeting the overarching goal (See Figure 1)

- High error rate in referral processing
- Work flow inefficiency and silos: Clerks and referral processing were divided by front end, back end and divert clerk tasks.
- Inefficient work schedules and excessive absenteeism
- Lack of sufficient intake phone coverage
- Lack of accurate data and knowledge of reports
- Overlapping lunch and breaks closing department

The following changes were made to be successful in attaining our goal (See figure 2):

- The work flow was changed from silos to a "team" structure. Each team consist of two RN Supervisors and two intake Clerks.
- Each team is assigned to a site. This process decreased the number of referral hand-offs and placed clerical task with the clerks and clinical task with the clinicians.
- "Float" RN and a "float" clerk that work during extended-shift hours and process all referral overflow
- Established a referral process manual and developed standard work guide that all intake clerks and RN Supervisors are trained and must follow
- Extended work hours for both clerks and RN Supervisors with a schedule that is aligned to the referral flow. Intake referral processing hours have been extended 7 a.m. - 7 p.m. There is a RN Supervisor and Intake clerk shift from 7 a.m. - 4 p.m. and 10:30 a.m. - 7 p.m. This schedule also includes staggered lunches and breaks to ensure ongoing coverage for continual referral processing.
- A designated intake clerk has been assigned for intake phone coverage to triage calls and route to the appropriate owner or resolve.
- Implementation of Daily Huddles and the use of visual huddle board to capture key metrics

#### Before

"It took 3 days for them to arrive."  
"Is patient X assigned to me?"  
"Where are the dc instructions?"  
"I was discharged 3 days ago, and I have not received a call."  
"When is someone going to visit my patient?"  
"I've called 3 times, and no-one has called me back."  
"Office staff need to be more diligent with messages."  
"They only called on the day they planned to visit."



#### After

"Care was well coordinated, on time, careful, kind efficient and encouraging."  
"Thank you intake! I have everything I need to do the visit."  
"I haven't seen the process in all agencies in KP NCAL, but I believe you have a best practice here."  
"Your new process has truly decreased the time from referral to start of care."  
"My experience could not have been better."  
"I heard from the nurse as promised, and everything related to my visit was excellent."

#### Customer Groups

- KP Members
- Home Health Clinicians (RNs, Pts, STs)
- Physicians and PCCs
- Intake Staff (Clerks, Intake RN Supervisors)
- Quality, Compliance, Regulatory Depts.
- Medical Center and Service Area Administration

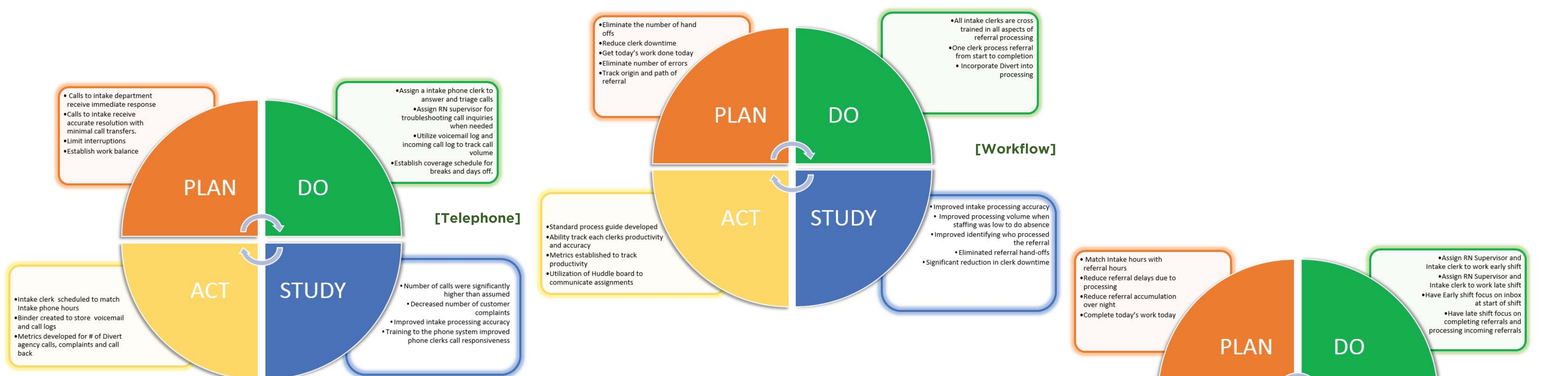
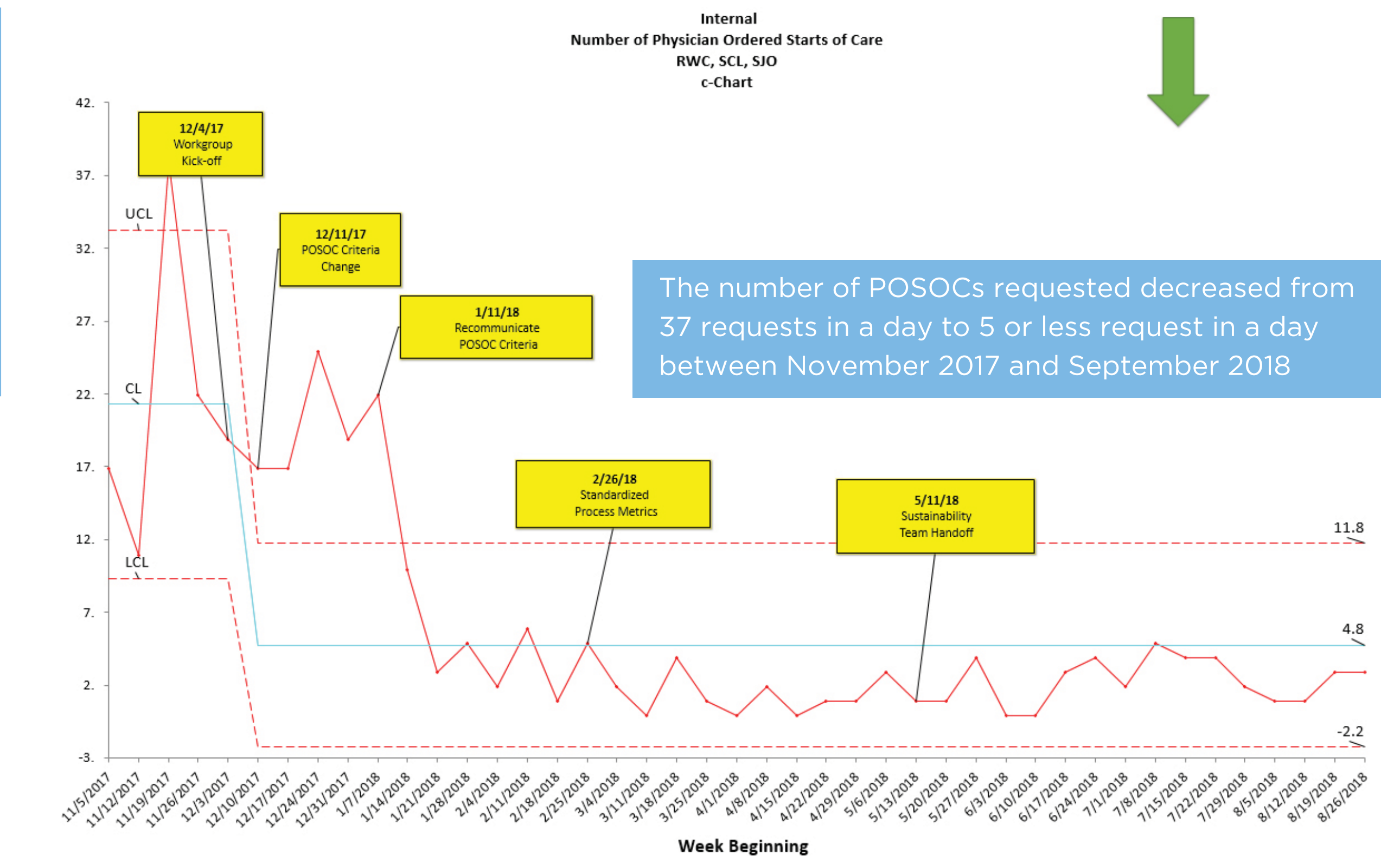
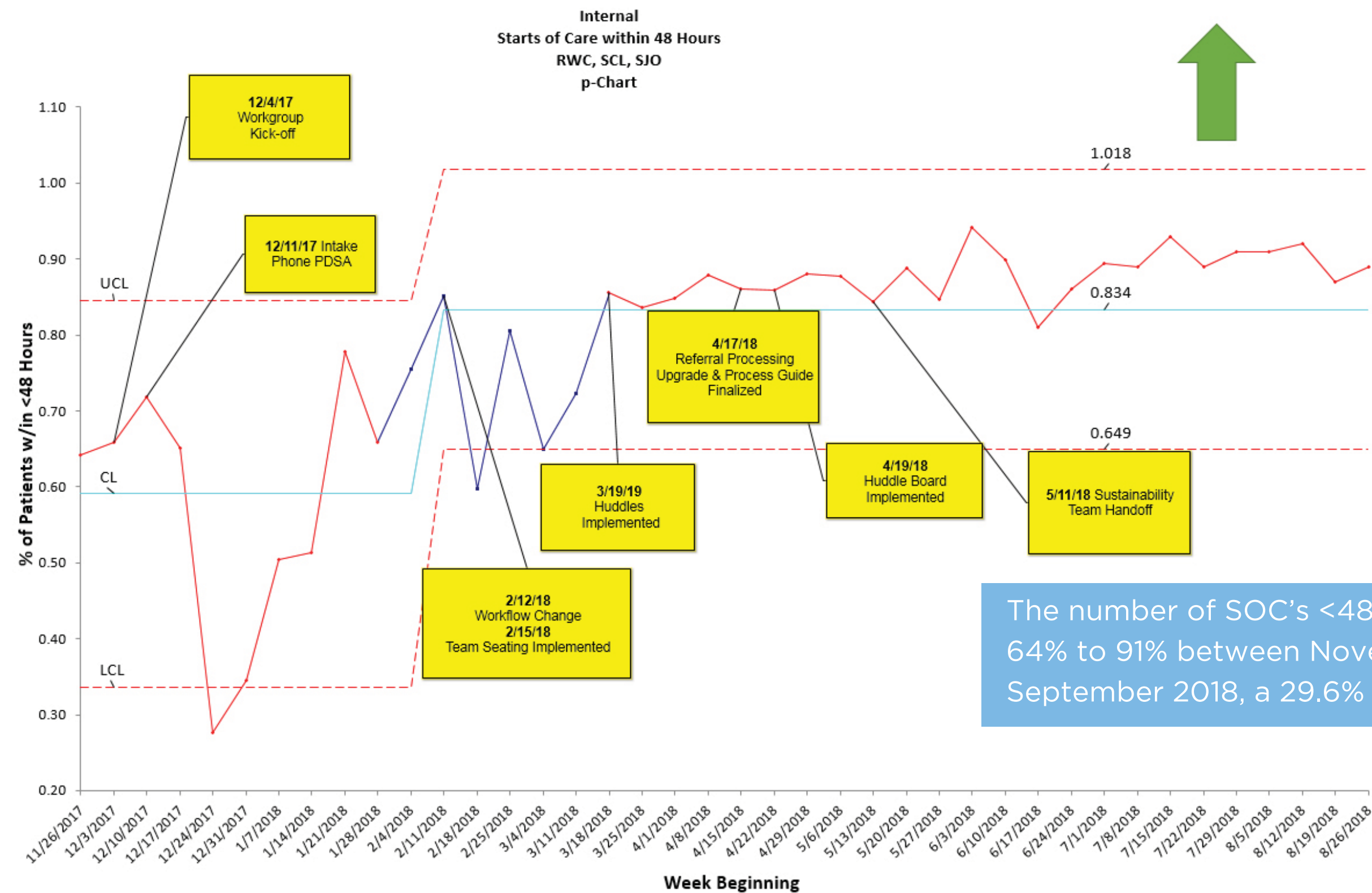
#### Customer Needs & Wants

- Call in timeframe stated on DC
- Summary/Instructions
- Be timely with starting care
- Don't burden with scheduling issues
- Accurate referral information
- Uploaded documents
- Information available early
- Easy referral process
- Minimal calls
- Trouble free process
- Completed referral
- Required documents available at time of Discharge or referral
- Quality and timely starts of care that meet regulatory requirements
- Improve efficiencies to reduce costs
- Excellent patient care experience

#### Translation into specific Customer Requirements

- Call day after discharge or referral
- Prevent readmissions
- Keep informed
- Start of Care visit within 48 hours of discharge
- Have accurate assignment prior to the start of the work day
- Have all documents required available and uploaded
- Starts of care timely
- No calls from patients who have not been called
- Have all starts of care scheduled on day of d/c or completed referral
- Decrease in calls associated with missing documents or information
- SOCs within 48 hours
- Improve HHCAHPS Scores
- Reduce Costs associated with intake process
- No bottlenecks in the intake process resulting in down time of clerks

### Charts



### Sustainability Plan

Item	Action	Responsible Person	Frequency	Issues / Comments
Bundled of Actions	Team Coverage	Admin Mgr	Daily	Reward and Recognition
	Referral Process Workflow	Admin Mgr/Site Director	Daily	Reward and Recognition
	Work queue	Admin Mgr	Daily	Coaching
Data Analysis & Results	Gather Data	Admin Mgr, Intake RN Supervisor	Weekly	Contingent upon Allscripts custom reports working
	Analyze Data	Admin Mgr, Intake RN Supervisors	Weekly	QI Macros
	Report Results	Site Director, Service Director	Monthly/Quarterly	
Communication	Project Team	Admin Mgr, Intake RN Supervisors, Site Director	2 times a day	Engage staff
	Department Leaders	Admin Mgr	Monthly/Quarterly	
	Clinical Staff	Site Director	Monthly/Quarterly	Solicit feedback with upload documents
Training	Intake Staff - Clerks	Admin Mgr	Monthly/PRN	
	Intake Staff - Nurses/Manager	Admin Mgr, Intake RN Supervisors	Monthly/PRN	
	Huddles	Admin Mgr	Daily/Weekly	
Other	Running Crystal Reports/ Tapestry Reports/ Guide updates	Admin Mgr	Monthly/PRN	



### Multi-disciplinary Team

Project Manager & Lead: Danielle Franklin  
Improvement Advisor: Service Director Sue Sanfacon  
Sponsors: Continuum Administrators Denise Johnson, Pat Vida, and Sally Wingard  
Champions: Service Director Sue Sanfacon and Site Director Elisa Enriquez

Front-line: NCAL Regional Practice Leader Sonal Mody  
Sr Data Consultant Edward Lo  
Quality Utilization Coordinator Natalya Babayeva  
Regional Service Director Maria Foreman  
KP Santa Clara Site Director Eliza Enriquez  
KP San Jose Site Director Jose "Gio" Giovanni  
KP Redwood City Site Director Sandra Hinzio  
Administrative Services Manager Ruby K. Grewal  
Clinical Services Supervisors Home Health Clerks