



**Cedar Rapids
Healthcare
Alliance**
Working Together for Patient Safety

Cedar Rapids Healthcare Alliance LEAN TEAM REPORT

OFFICE ADMINISTRATION LEAN TEAM UPDATE MAY 22, 2008

Cedar Rapids Healthcare Alliance was awarded a grant from the Iowa Foundation for Medical Care (IFMC) in March 2008. The grant was designed to study clinic office administration (non-clinical) processes that would benefit from process improvement teams. The first lean team meeting was held May 22, 2008 at Mercy Medical Center. The team members invited were:

- Kallie Meyer—Linn County Anesthesiology
- Jean Thomas—Family Medicine Specialists
- Jenny Hawkins—Oncology Associates
- Sandra Miller—Cardiologists PC
- Sandy Christiansen—PCI Surgery
- Rosalie Bowers—Radiology Consultants of Iowa
- Robin Henderson—Internists PC
- Kelly Thole—Mercyare Vernon Village
- Lisa Galvin—Iowa Eye
- Paul Chairpar—Weland Lab
- Kim Krizek—Wellmark

Facilitator: Sarah Pavelka, Iowa Quality Center

As a first step to developing the team's focus, Sarah Pavelka, Team Facilitator, reviewed the agenda, and also shared background on the IFMC grant. Sarah shared the scope of the team and how the team will operate.

Sarah shared lean concepts with the team. Sarah mentioned that the Iowa Quality Center has many

tools that team members may access those tools for their own use. Team members were encouraged to take advantage of the team's training for use back at their respective clinics.

To summarize the training, Sarah described lean as a process to create best practices and implement them.

Successful lean teams require:

- Leadership
- Culture and
- Teamwork

Change in any environment is uncomfortable.

Words selected to create the team's purpose statement included:

Accurate	Reduced duplication
Accuracy	Value
Improvement	Shared (issues)
Consistent	Analysis
Process	Simplify
Focused	Community cooperation

DRAFT Team Purpose Statement: *The purpose of this improvement team is to create a process that reduces duplication, provides accurate, and consistent registration and patient indemnification information for the community of health organizations. This will be completed by focusing on value for the patient, simplifying through the sharing best practices and cooperation.*

May 2008

Special points of interest:

- Cedar Rapids Healthcare Alliance is a not-for-profit corporation formed in 2006 to create a community model of care delivery and patient safety centered on transparency, accountability, and cooperation.
- "Lean" is an approach to analyze the flow of information in order to reduce waste to achieve enhanced value to the patients
- "Six Sigma" is a process that measures defects on a per million basis.
- ISO 9000 is a family of standards for quality management. There is a certification process for ISO 9000 companies.
- The term "lean" came from a book by James Womack and Daniel Jones published in 1996. The authors used "lean" to describe Toyota Production System and how American industry can adopt lean.
- The teams involved with the IFMC grant are unique because as they represent the medical community of Cedar Rapids, they are also working across organizational boundaries to develop system-wide improvements.

Survey Results of Administrative Office Process Improvement

Cedar Rapids PHO (CRPHO) volunteered to distribute and summarize a brief survey of office managers and staff. The survey asked respondents to identify possible processes which would benefit from process improvement. The surveys identified the following as the top issues facing offices.

1. Obtaining accurate ID card and registration information
2. Effectively managing the pre-certification and prior authorization programs of various payors
3. Managing and responding to patient calls to the office
4. Collection of bad debt
5. An effective patient referral process where all necessary information (clinical and non-clinical) is present at the specialist office prior to the patient being seen)



Meet Lean Team Facilitator, Sarah Pavelka

Sarah Pavelka has been assigned as the lean facilitator for this grant. Sarah works with the **Iowa Quality Center**. Sarah is a Master Six Sigma Black Belt and is board certified in occupational therapy, ergonomics, healthcare quality. "I have always blended my clinical experience with my perspectives from industries" commented Sarah. Sarah is a state examiner for the Iowa Recognition for Performance Excellence and a task force member for the Iowa Hospital Association and the Iowa Healthcare Collaborative.



"The healthcare community in Iowa as well as the nation has really flourished in the areas of performance excellence, quality and continuous improvement."

Sarah Pavelka

Sarah holds degrees in biology and psychology from Luther College as well as a degree from Concordia University Wisconsin in Occupational Therapy. In addition, she has Master's degree in Healthcare Administration from Des Moines University where she is also on faculty. You can contact Sarah at spavelka@iowaqac.org.



Lean Team Code of Cooperation

The team worked on the Code of Cooperation for the rest of the team meetings. These code of cooperation include:

- Input from all members of the team
- All ideas have value
- Respect each other
- Use good listening skills
- No side bar conversations
- Tasks or homework done responsibly
- Positive attitude
- Have fun

Local Surgeon Leads Quality Improvement in Healthcare Jim Levett, MD



Quality healthcare is clearly a national issue, but we at **Cedar Rapids Healthcare Alliance**

(CRHA) believe that it is a local issue as well. Our vision is that the **CRHA** will serve as the infrastructure to enable stakeholders from all segments of the commu-

nity to work together in addressing healthcare issues jointly. ISO 9001 quality principles which were deployed in our **AHRQ Community Anticoagulation Therapy (CAT) Clinic** facilitate management of patients on warfarin and promote the continual improvement of healthcare within our community **CRHA** received a new grant from **Iowa Foundation**

for Medical Care (IFMC) in April 2008. This new grant will be utilized as the framework for developing a **system of care** that will improve communication, facilitate establishment of care pathways and safe practice interventions, and enhance the continuity of patient care in our community.

"Healthcare is best improved by working with the entire Cedar Rapids medical community. Process improvement teams focused on office administration issues will ultimately increase the value patients receive from us."

Jim Levett, MD
President, CRHA

Team Scope

Sarah led the team on an exercise to define the scope of the team. The team was asked to define what begins the process and what ends the process. This improvement team will focus on the functions of patient identification and the registration sub-process. However, they understand the importance of good information in the beginning of the system and how it can have an effect on the rest of the billing and payment collection processes.

The team decided at this time to define the scope as being:

START: Patient calls the office

END: Claim is paid correctly by insurance

Other team "starts" discussed were:

- Insurance company issues ID card
- Patient enters registration area
- Hospital registers patient

Other project "ends" discussed by the team included:

- Patient leaves registration or the clinic
- Patient demographics entered into claims system

Parking Lot Issues

It is common in lean teams to identify other issues which could benefit from further discussion but the issue may not be directly relevant to the team's focus. The facilitator will use a "parking lot" list to park issues. These "parking lot" issues are not lost but saved for discussion later with either the team sponsor (CRHA) or for use later by another lean team.

Team's Current Parking Lot Issues

1. The team members shared that they were able to network with other offices which was extremely valuable even though some topics were not related to the team's focus.

LEAN TEAM Q&A

How are team members selected?

Cedar Rapids PHO is acting as the administrative support team to CRHA to administer this grant. If you have an interest or want to learn more about being on a team, please contact Jeanette at: jwerling@crpho.com.

Is any special training or background required to be on a team?

No, in fact, sometimes team members who know nothing about a process are helpful to give a "fresh perspective" to existing processes being studied for improvement. Even if the team is not related to your area of expertise, please feel free to volunteer.

CEDAR RAPIDS

PHYSICIAN·HOSPITAL ORGANIZATION

This newsletter was produced and distributed by **Cedar Rapids Physician Hospital Organization**, working as the administrative partner to **Cedar Rapids Healthcare Alliance**.

For questions or comments, please contact:

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Types of Waste Related to Incorrect Patient ID Cards

Sarah led the team on a process of identifying the different types of waste in patient registration at the office setting. The following types were noted by the team:

DEFECTS

- Fixing defect
- Verifying orders
- Re-filing claims

STORAGE

- requisition lab orders
- Registration forms (duplication

TRANSPORTATION

- Picking up registration disk from MMC operating room
- Faxing and mail
- Phone calls

OVERPRODUCTION

- Multiple copies of insurance ID cards
- Process of different types of patients differently
- Shredding

UNNECESSARY PROCESS

- Re-filing claims
- Refunds and managing outstanding refunds
- Insurance codes
- Insurance addresses

MOVEMENT

- Waiting/checking for hospital transcription

DUPLICATION

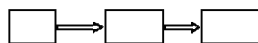
- Registration forms

Team Homework—Value Stream Map

As part of the team's homework, the team was asked to complete a value stream map of the registration/claims process in their office. (See definition of value stream on right.) The Value Stream should include:

1. collect all steps in the registration and claims process
2. Group some steps, divide by task, person, station (etc.)

3. Make box for each step



4. collect how much time it takes to do each step
5. If different entry, make more than one map

Value Stream Mapping

Value Stream Mapping is a lean Six Sigma methodology often used to help organizations understand which part of business processes add "value" to the end product or service being produced and which parts of their processes add waste (or non-value add) and can therefore be removed.