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Understanding Open Access

Carlsbad Mental Health Center

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What is Open Access?

1. A commitment to provide comprehensive assessments the same day it is requested.
2. A commitment to review each process in your practice to determine if it is agency centered or customer centered.
3. A commitment to focus on engagement practices


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Why Open Access?

- ❖ Improve customer service
- ❖ Eliminate no-shows for assessments
- ❖ Customer engagement, retention and completion
- ❖ Responsive to referral sources
- ❖ Improve revenue
- ❖ Improve practice efficiency
- ❖ Deliver your Mission


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What do you hope to accomplish?

- ❖ Improved quality of care
- ❖ Immediate response to customer's needs
- ❖ The 10-day rule
- ❖ Develop and implement Level of Care standards
- ❖ 80 percent completion of care ratio
- ❖ Reduction of customer crises

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What steps do you take?

- ❖ Rapid Cycle Implementation Plan – RCIP
- ❖ Evaluate & Revise Intake Form & Requirements
- ❖ Centralized Data Gathering
- ❖ Implement an Intake Team
- ❖ Define Capacity
- ❖ Understand No-Shows
- ❖ Transform data into information
- ❖ Centralize Scheduling

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Carlsbad: Rapid Cycle Change Plan

Version: May 13, 2008
 Carlsbad Mental Health Center
 Management Change Action/Implementation Plan
 Implementation Scope of Work and Timeline

Legend: Plan (yellow), Training (green), Evaluation (blue), Act/Implement (red)

Scope of Work Tasks:

- Enhanced Access to Services**
 - Design/Implement Access Flows that enhance 1st and 2nd Appointments
 - Evaluation of Implementation of Access Flow Changes
 - Develop and Implement No Show/Cancellation Management
 - Evaluation of No Show/Cancellation Management Procedures
 - Establish Discharge/Transition Procedures for Inactive Clients
 - Evaluation of Discharge/Transition Procedures
 - Develop and Implement Extended Hours of Operation Initiative
 - Evaluation of Extended Hours of Operation
 - Re-Design As Needed and Final Evaluation Outcomes
- Client Scheduling**
 - Review/Design/Implement Scheduling Templates
 - Evaluation of Scheduling Template Implementation
 - Develop/Implement Appointment Backfill Procedures
 - Evaluation of Backfill Attainment Levels and Procedures
 - Develop/Implement Community Based Plan to See Scheduling
 - Evaluation of Community Based Plan to See Scheduling Model
 - Re-Design As Needed and Final Evaluation Outcomes

Source Note: SPQM Measurement Services and Rapid Cycle Implementation Planning (RCIP) were developed by MTM Services.

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Scope of Work Tasks:

- Client Engagement Pilot**
 - Participate in Access and Retention Client Engagement Pilot Study
 - Evaluation of Engagement Pilot Outcomes
 - Implementation of Concurrent Documentation Model Centerwide
 - Evaluation of Concurrent Documentation Penetration Rate
 - Re-Design As Needed and Final Evaluation Outcomes
- Leadership, Coaching/Mentoring and SPQM Data Use**
 - Adopt Revised Supervision and Evaluation Policy and Procedures
 - Write/Revise and Implement New Job Descriptions
 - Train staff and supervisors on focus/purpose of new supervision model
 - Train Executive Teams in Use of SPQM Reports for Decision-Making
 - Training Management & Team Leaders in Use of SPQM Reports
 - Implement Use of SPQM Report "Day in Life Report" in Supervision
 - Evaluate Supervision/Coaching Activities
 - Provide Ongoing Leadership Training for all Managers
 - Re-Design As Needed and Final Evaluation Outcomes
- Quality Operations and Compliance CQI Efforts**
 - Review and Implementation of Program Cost Reductions
 - Staff Documentation Submission Compliance Levels
 - Evaluate Documentation Submission Levels of Compliance
 - Qualitative Documentation Level to Support Medical Necessity
 - Evaluate Documentation Quality to Support Medical Necessity
 - Monitor/Evaluate and Problem Solve Productivity Levels of All Staff
 - Incorporate Benefit Package Design - Clinical Criteria for Care Model
 - Evaluate Benefit Package Design and Utilize Implementation
 - Develop, Evaluate and Implement Revenue Generation Models
 - Re-Design As Needed and Final Evaluation Outcomes

Source Note: SPQM Measurement Services and Rapid Cycle Implementation Planning (RCIP) were developed by MTM Services.

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Evaluate and Revise Intake Form and Content

- ❖ Source verification for all items on the Assessment
- ❖ Create pay source specific charts
- ❖ Eliminate redundant paperwork
- ❖ Customer Service Representative will gather all essential data

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Centralized Data Gathering

- ❖ Gather essential data prior to the assessment
- ❖ Avoid handing a paperwork packet to the customer
- ❖ Use your most talented Customer Service Representative to gather data and enter it into the computer
- ❖ Engagement is influenced by the way the customer is greeted at their first visit.

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Implement Intake Team

- ❖ Assessment Team only provides assessments
- ❖ Independently licensed clinicians
- ❖ Excellent diagnostic skills
- ❖ FTEs must match demand – 15 per week per clinician

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What is Capacity?

- ❖ Capacity must be considered in terms of treatment needs rather than availability.
- ❖ The practice *and* the clinician are at capacity when they can not provide the appointments required by the treatment plans of their customers.

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What influences capacity?

- ❖ Scheduling assessments
- ❖ High no-show rates
- ❖ Innovative scheduling
- ❖ Productivity goals
- ❖ Center cancellations
- ❖ Inactive caseloads - No discharge policy
- ❖ Scheduling based on treatment needs rather than availability

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Understanding No-Shows

- ❖ What they cost you
- ❖ By referral source
- ❖ By clinician and diagnosis
- ❖ Time of day
- ❖ Day of week

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Centralized Scheduling

- ❖ Customer Service Representatives schedule all appointments
- ❖ Schedule 7 hours a day
- ❖ Eliminate “paperwork” time
- ❖ Supervision, MIS and SPQM to manage caseload

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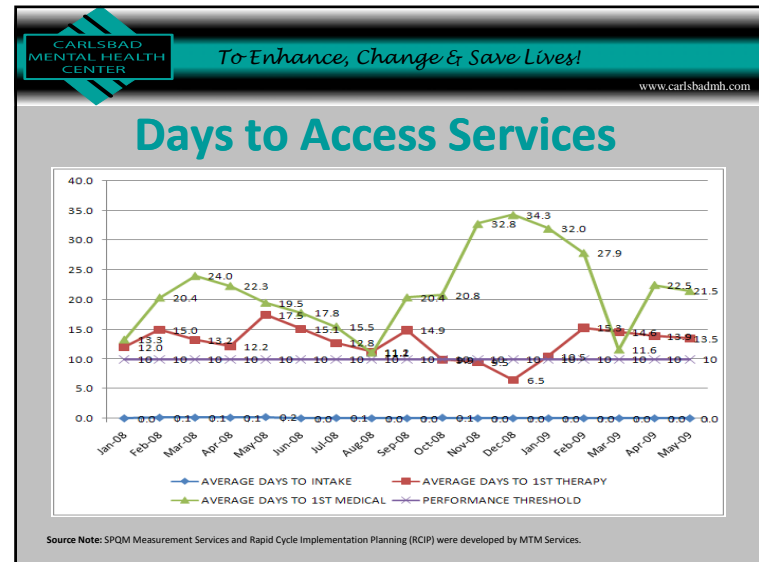
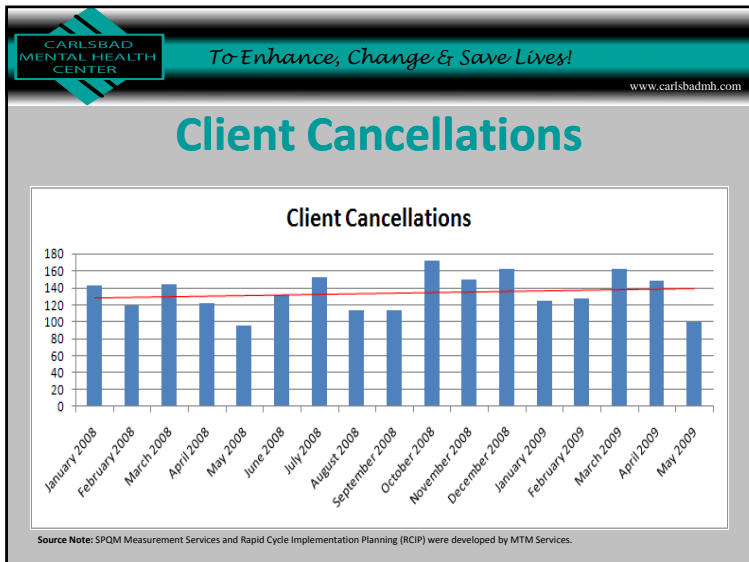
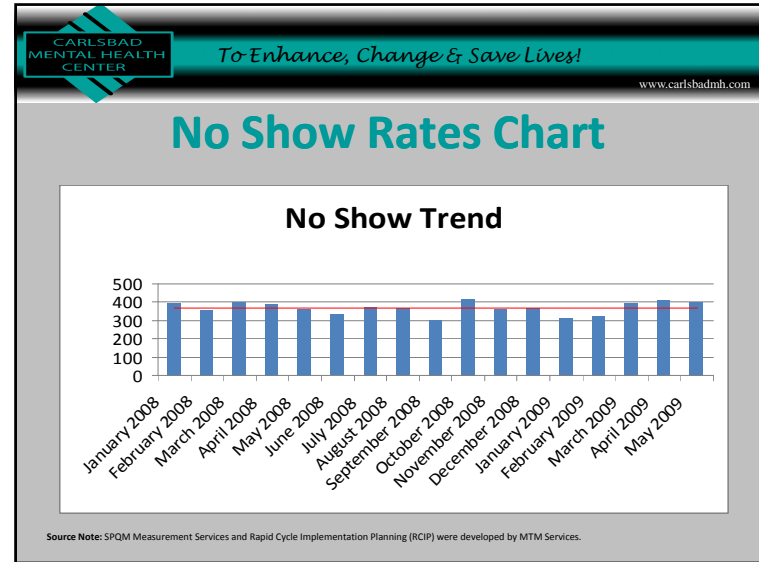
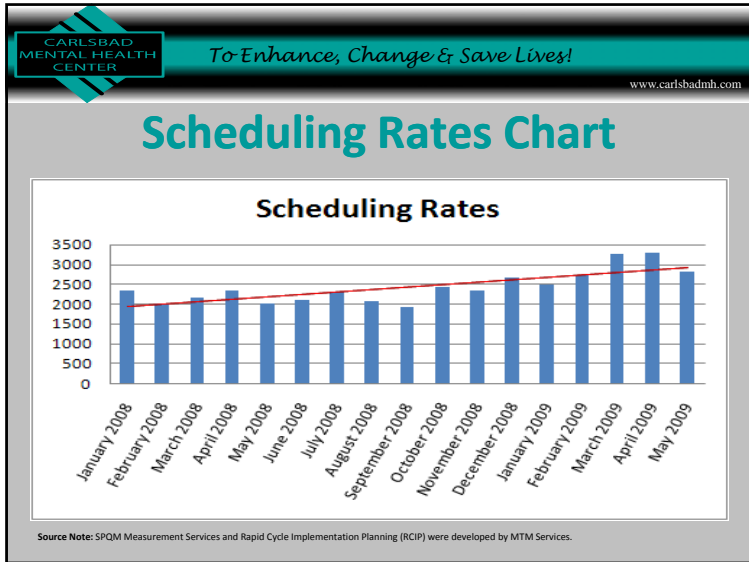
How will my staff respond?

- ❖ Resistance, fear and emotional blackmail
- ❖ Whose on board
- ❖ Performance expectations
- ❖ Standard operating procedures
- ❖ Data driven decisions

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Accountability

- ❖ Financial incentives reward productive staff
- ❖ Consequences for below standard productivity
- ❖ Implement data driven supervision practices
- ❖ Hold managers accountable for their Team’s performance



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Summary

- ❖ Open Access increases capacity
- ❖ Improves customer engagement
- ❖ Increases responsiveness to referral sources
- ❖ Generates revenue
- ❖ Defines an Episode of Care for each customer
- ❖ Increases access and efficient improves quality

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Final Remarks

- ❖ Open access is a dynamic process –Expect challenges.
- ❖ RCIP will help you maintain multiple perspectives on the horizon – all of which play a role in managing change.
- ❖ Remember you don't have to be "Perfect" you just have to be committed.

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Questions & Answers