



## POD PROCESS

### OBJECTIVES

#### **Improve Population Health**

#### **Improve Provider/Patient Interaction**

- Less clicks by provider
- More face to face time with the patient
- Assign tasks to appropriate level to allow provider to concentrate on medical decision making

#### **Increase Patient Satisfaction**

- Through communication and education via the discharge process

#### **Increase throughput**

### What is a POD?

- ▶ Work group consisting of Providers and clinical staff
- ▶ Also included in process are chart “scrubbers”, front staff - check in and check out
- ▶ Pod members work together as a team to insure exceptional patient care and experience
- ▶ Pods are all part of the clinical team and work can be shared across pods if necessary

We have three Pods at this time

POD 1 and 2

Three providers

Four clinical staff - 3 MA's 1 RN

POD 3

Two providers

Three clinical staff - 2 MA's 1 LPN



### First steps in our journey

- Practice buy in
- Pilot program
- Provider buy in , pilot providers as champions

**LAB ORDERS** - Seven to Ten days prior to appointment

- Each Pod will determine who will be ordering labs for each provider
- Scrub sheet started with patient name
- Labs ordered via standing orders for each provider
- Notify patient and document in a phone note
- Scrub sheets given to scrub team

**CHART SCRUB** - Two days prior to appointment

- Identify gaps in care
- Update Care Guidelines
- Check to see if labs have been completed, call patient if not, to see if they can be completed or have patient come in fasting.



Revision 30

Visit Type: \_\_\_\_\_ Provider: \_\_\_\_\_ Appt Date: \_\_\_\_\_  
 Hallway: 1 2 3 Care Manager: \_\_\_\_\_  
 Patient Name: \_\_\_\_\_ DOB: \_\_\_\_\_ Last CM Appt: \_\_\_\_\_  
 CM Referral: \_\_\_\_\_

**Dates of Last Exams**  
 Complete Physical  
 Last: \_\_\_\_\_  
 Planned Care Visit  
 Last: \_\_\_\_\_  
 Medicare Wellness Visit  
 Last: \_\_\_\_\_  
 Type: \_\_\_\_\_  
 Next Appt if Sched: \_\_\_\_\_  
 Visit Type: \_\_\_\_\_

Care Guidelines Updated  
 No MCR

**Care Gaps Identified:**

**Screening Referrals**  
 Screening Colonoscopy  
 Digestive Health Assoc.  
 Done  
 Last Provider: \_\_\_\_\_

**Diagnostic Referrals**  
 \_\_\_\_\_ Dk: \_\_\_\_\_  
 \_\_\_\_\_ Dk: \_\_\_\_\_  
 Therapy Referrals  
 \_\_\_\_\_ Dk: \_\_\_\_\_

**Diagnostic testing**  
 Ankle \_\_\_\_\_ Dk: \_\_\_\_\_  
 Chest Xray \_\_\_\_\_ Dk: \_\_\_\_\_  
 Other: \_\_\_\_\_ Dk: \_\_\_\_\_  
 Spirometry \_\_\_\_\_ Dk: \_\_\_\_\_  
 WPPC  MMC  Done  
 Mammogram \_\_\_\_\_ Dk: \_\_\_\_\_  
 Diagnostic \_\_\_\_\_ Dk: \_\_\_\_\_  
 Screening \_\_\_\_\_  Done

**Checklist**  Initial  Home  
 Print & Provide Patient Plan  
 No Plan Needed  
 Send via Portal  
 Provider Discharged Pt  
 No Plan Needed  
 Print Home Exercise

Well Child  
 Annual Physical  
 RWV Type:  
 PCV/MWV-2  
 Miss Check 1 2  
 Planned Care Visit 1 3 4 6  
 Office Visit  
 No Appointment Needed  
 Lesion Removal 15 30  
 GMT  
 Other  
 Clinical Appointment

BP Re-check \_\_\_\_\_ Dk: \_\_\_\_\_  
 Follow up call 24 48 \_\_\_\_\_ Dk: \_\_\_\_\_

Scrub Sheets



Patient checks in  
 Insurance confirmed  
 Tracking to ready for onboarding



### Onboarding

- Clinical bring patient back
- Triage for patient visit type
- Review care gaps with patient
- Update care guidelines
- Flow sheets for each visit type
- Tracking – ready for provider



### Provider

- Review scrub sheet to identify gaps in care
- Patient visit
- Mark sheet for any referrals or labs that you want the discharge clinical to order OR put orders in for referrals and lab and do not mark the sheet.
- Add patient plan – mark next appointment on the sheet with Dx.
- Mark sheet for the patient plan ( front or clinical)
- Mark tracking ready for discharge for PCV, Imms, any patient with a medication change or if you feel the patient needs to be discharged by a clinical.
- Change tracking to “ready for discharge” or “discharged”
- Give encounter and scrub sheet to either the patient or the discharge clinical



### Discharge clinical

The discharge clinical is accountable for maintaining the flow of the office, discharging patients and reconciling scrub sheets by the end of the day.

- Provider will change tracking to “ready for discharge” if discharging by clinical is requested.
- Clinical will order referrals, labs and testing that provider has marked on the scrub sheet.
- Confirm care gaps have been addressed
- Print and review patient plan with the patient
- Clinical may schedule follow up appointment or have patient do that at checkout
- Reconcile scrub sheets at the end of the day



Patient checks out with front office receptionist

Appointments made and added to patient plan

Referrals generated

Instructions given

Patient plan given, if patient has not received it from clinical

Tracking changed to “Checked out”



Take a ways.....

Practice Buy in – Provider champion

Planning and communication – the “why” behind the change

Implementation is the hard part!

Change control committee

Metrics – are we accomplishing our goals?



New Patient Liaison



## The New Patient Liaison Process

Implemented to shift the patient paradigm from an expectation of reactive care to proactive participant in health management.

Other factors included improving our check in efficiency and communicate office policies and expectations more effectively with patients.

When new patients contact the office they are directed to our New Patient Liaison

During the initial phone conversation the following are addressed

- Are they familiar with the office – do they have a particular provider they want to see?
- Tell them about our website
- Review insurance – confirm we participate with their insurance
- Medication review
- Explain our orientation process
- Schedule an orientation only appointment with the liaison



### At the orientation appointment

- Patient Centered Medical Home and what that means for the patient
- Review what the patient can expect from our practice and what expectations we have from the patient
- Care Managers
- Office hours / on call provider
- Financial policy / insurance
- Are we a good fit?
- Appointment scheduled with provider
- History form filled out
- Signatures
- Chart formed