ASCO’s Quality Training Program

Project Title: Utilizing a Case Management System to Reduce the Response Time for Symptom Management Calls

Presenter’s Name: Natalie Dickson, MD
Institution: Tennessee Oncology

Date: October 8, 2015
Institutional Overview

- Tennessee Oncology is a community medical and radiation oncology practice based in Middle and East Tennessee, with 87 physicians and 35 mid-level providers in 33 locations across the state.\(^1\)
- The clinical site for the Tennessee Oncology ASCO QTP is the Saint Thomas West location.
- The Saint Thomas West office has 5 physicians, 3 nurse practitioners and sees over 5000 unique patients annually.\(^2\)

\(^1\) Provider and clinic count as of June 2015; includes all medical and radiation clinics and all scanning facilities.
\(^2\) Site provider count as of June 2015; patient data for 2014.
Problem Statement

• The Saint Thomas West clinic receives on average 500 calls daily. There is not an effective process for appropriately categorizing or prioritizing incoming patient phone calls, or to address symptom management calls according to evidence-based protocols. Additionally, there is neither a system to track symptom management calls, nor a procedure to determine whether they are being handled correctly and on a timely basis.
Team Members

Team Leader:
• Natalie Dickson, MD, CMO

Team Facilitator:
• Larry Bilbrey, Regional Operations Manager

Team Members:
• Linda Hays, RN, Clinical Supervisor
• Pam Lesikar, RN, Triage Nurse/Care Coordinator
• Aaron Lyss, Director of Value Based Care
• Kathy McGee, MSN, RN, CCOO
• Jani Sarratt, Process Improvement Specialist
• David Scrugham, Application Support Manager
• Ansley Tillman, RN, Triage Nurse

Project Sponsor:
• Jeff Patton, MD, CEO

Improvement Coach:
• Laurie Kaufman, MSN, RN
Patient call clinic
Staff answers call
Staff asks 5 clinical questions
Any affirmative answers?
Call is non-emergency; transfer to Triage voice mail
Triage RN retrieves message
Triage RN returns patient call
RN triages patient symptoms
Is the call clinical in nature?
Transfer call to appropriate Non-clinical staff
End Process
Yes
End Process
No
Call is an emergency; transfer directly to Triage RN
Instruct patient to call 911
End process
No
Does patient need emergency care?
Yes
MD input required?
Yes
RN goes to find Physician or sends Reminder
MD provides intervention instructions
RN advises patient per Physician instruction
End process
No
RN provides appropriate intervention information to patient
Document in Aria
End process
Yes
No
Yes
No
End Process
No
Yes
Yes
No
End Process
Cause & Effect Diagram

1. **TECHNOLOGY/PROCESS**
   - Software issues
   - Unable to prioritize calls
   - System crashes
   - Ill-defined processes
   - No Triage protocols

2. **PATIENT EDUCATION**
   - Medication Instruction Issues
   - Pre-test instruction issues
   - Appropriate phone process
   - Patient expectations of nursing
   - Patient culture

3. **STAFF EDUCATION**
   - Appropriate phone process
   - Lack of medical knowledge
   - Lack of responsibility

4. **PHYSICIAN ISSUES**
   - Physician accessibility
   - Physician lack of responsibility
   - Physician time restraints
   - Physician schedule
   - No standardized protocols

5. **REFFERRING PROVIDER ISSUES**
   - Unable to reach PCP
   - Lack of PCP responsibility
   - Lack of education from PCP

6. **STAFFING**
   - Not enough staff dedicated to answering phone calls
   - Not enough triage nurses

Symptom management calls not addressed in a timely fashion.
Diagnostic Data

Data was manually collected for the week of April 20, 2015 for 159 sequential triage calls. Two members of the team listened to all the messages on the triage nurse voicemail and placed them into 8 categories. Of the 22 Symptom Management calls, 12 (54%) were answered within 2 hours.

- 56 – Non-Clinical: deemed inappropriate for nursing (Appointments, Directions, Medical Records, Other Office, Hospital Issues, Demographics, Portal, Informational Calls)
- 27 – Medication Refills
- 22 – Symptom Management
- 20 – Lab Questions/Test Results
- 14 – Medication Instructions
- 9 – Paperwork (FMLA, Pre-Authorization, etc)
- 7 – Referrals
- 4 – Pre-test Instructions

Pareto Chart
Aim Statement

- Increase the percentage of symptom management calls that receive a clinical intervention within 2 hours from 54% to 80% by October 8, 2015.
Measures

- **Outcome Measure:** Percentage of calls receiving clinical intervention within 2 hours
- **Patient population:** All patients that call for symptom related issues
- **Calculation methodology:** Number of calls with clinical intervention within 2 hours (numerator); All symptom management calls received (denominator)
- **Data source:** EMR, Telephone System, Case Management System
- **Data collection frequency:** Variable
- **Data quality limitations:** Manual process initially; Sampling of data
Measures

• Process Measure: Percentage of non-clinical calls routed to triage nurse
• Patient population: All calls referred to triage nurse
• Calculation methodology: Number of non-clinical calls routed to triage nurse (numerator); Total numbers calls routed to triage nurse (denominator)
• Data collection frequency: Daily
• Data quality limitations: Baseline data based on manual reporting.
Baseline Data

Time from Origin of Symptom Management Call to Clinical Intervention
(determined from the time call was received in phone system to the closeout time stamp on the triage questionnaire in the EMR)

Actual Value  Mean  Goal
# Prioritized List of Changes (Priority/Pay-Off Matrix)

## Priorities

- **High Impact**
  - Redesigned escalation: automated phone tree
  - Reassigned additional triage nurse
  - Reassigned staff as operator

- **Low Impact**
  - Allowing additional staff to take calls
  - Measuring staff satisfaction
  - Triage access to G4

## Ease of Implementation

- **Easy**
  - Address Lync/IT issues
  - Expand patient portal access
  - Physician education & engagement
  - Create triage protocols

- **Difficult**
  - Patient education on phone process
  - Staff Education
  - Patient education on meds

## Notes
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# PDSA Plan (Tests of Change)

<table>
<thead>
<tr>
<th>Date of PDSA cycle</th>
<th>Description of intervention</th>
<th>Results</th>
<th>Action steps</th>
</tr>
</thead>
<tbody>
<tr>
<td>July 1, 2015</td>
<td>Operator assigned.  2 Care Coordinators allocated. Expanded portal access.</td>
<td>Staff satisfied with roles.</td>
<td>Training on Case Management System for Operator and Care Coordinators. ONS based Triage protocols created.</td>
</tr>
</tbody>
</table>
Change Data

Symptom Management Calls receiving Clinical Intervention within 2 Hours (p-chart, 3 sigma)

<table>
<thead>
<tr>
<th>Percentage</th>
<th>Symptom Management Calls</th>
</tr>
</thead>
<tbody>
<tr>
<td>4/20/2015</td>
<td>Mean</td>
</tr>
<tr>
<td>4/27/2015</td>
<td>Actual Value</td>
</tr>
<tr>
<td>5/4/2015</td>
<td>Lower Control Limit</td>
</tr>
<tr>
<td>5/11/2015</td>
<td>Upper Control Limit</td>
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<tr>
<td>5/18/2015</td>
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<td>5/25/2015</td>
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<td>6/1/2015</td>
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<td>6/8/2015</td>
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<td>9/14/2015</td>
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<tr>
<td>9/21/2015</td>
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Operator/Care Coordinators
Case Management System

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Conclusions

• The percentage of symptom management calls that received a clinical intervention within 2 hours increased from 54% in April 2015 to 73% in September 2015.

• The percentage of non-clinical calls that reach the triage nurse has been reduced significantly with the use of the Case Management System.
  – Before: 56/159, 35%
  – After: 3/643, < 1%
Plan for Sustainability

• Emphasize that the changes are aligned with Tennessee Oncology’s mission statement to provide the highest quality of care and service to our patients.
• Train all the nurses on new triage processes.
• Train all front office staff on operator processes.
• Update triage policies and procedures.
• Reports to be reviewed by management at weekly physician meeting.
• Develop tool in Case Management System to prioritize physician worklist.
• Integrate Case Management System with telephone system and EMR.
Our Team
Appendix A: Lessons Learned

- Eliminate manual data collection in all areas possible.
- Determine method of data collection before project kick-off.
- Small PDSA cycles beneficial to identify what works early.
- Technology will not solve all problems.
- Must address the workflow of all team members involved.
Appendix B: Materials Developed

1. Telephone Triage Protocols

2. Case Management System workflows