

## **Financial Disclosure**

I have no financial conflicts to disclose related to this presentation

# Objectives

The purpose of this lecture is to examine and streamline the processes involved in scheduling, obtaining diagnostic testing and optimizing patient flow through a retina practice.

# Objectives

# At the conclusion of the lecture the attendees should be:

1). Able to have their staff schedule an appointment, appropriate testing and calculate the estimated cost PRIOR to the patient visit

2). Able to have staff appropriately prep the patient for their appointment type (INJ ONLY, NEW,  $\ensuremath{\mathsf{F}}(\ensuremath{\mathsf{U}})$ 

3). Able to maintain efficient clinic flow with a reduced staff

4). Identify areas for improving efficiency in their individual practices





### **Operational Efficiency**

#### Organization

- The appropriate structure and personnel to complete tasks required
- Preparation
  - The completion of tasks, information and the inventory in anticipation of the clinical workload
- Cooperation(Teamwork)
- Processes(Communication)that allow for the coordination
   of all aspects of patient care services

#### Organization

- Well defined job tasks and responsibility
  - Clinical Team- Work-up, Scribe and Float
  - Administrative team Intake, Checkout, Insurance Verification, Billing Services
- Uniformed orientation and training
- Single trainer
- Consistent terminology and implementationRoutine review and renewal(reinforcement)
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- Clearly defined flow
- Established protocol"Zone" concept emphasis

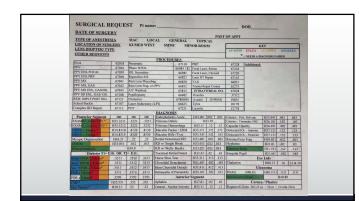
Float
During down time float should be in the surgery scheduling office working on secondary task; <u>ice phone calls (medical records / RX refills), confirm next weeks st times, scanning, surgery naper work</u>
Stock the Diagnostic trooms at the *beginning of each day*Alerts doctor when patient is seated in the room by calling or texting him
Perform diagnostic texting, findus, IVFA, OCT, A's & K's, HVF, and ultrasound
Consent patient for surgeries
Set up laser and pneumatic retinopesy
Leads patients to the check out desk
Brings surgery request over to check-out
Relays messages to the doctor regarding incoming calls, contacts outside physicinas at schedodors' request
Cleans equipment between each patients
Cleans equipment between each patients

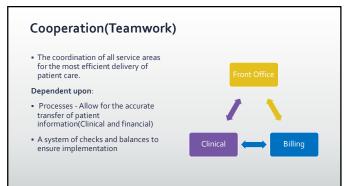
#### Preparation

- Completion of the tasks required to perform key elements of a comprehensive patient care experience.
- Front office
- Accurate medical records, insurance data
  Understanding of visit type (New, Routine, Injection only)

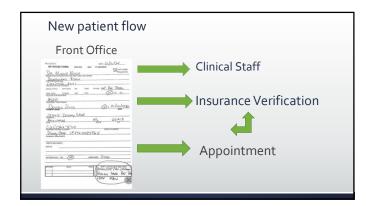
Clinical Staff Patient encounter Understand visit type (New, routine, Injection only)

Billing staff Pre- certification, Prior authorization Patient financial responsibility (No Surprise)

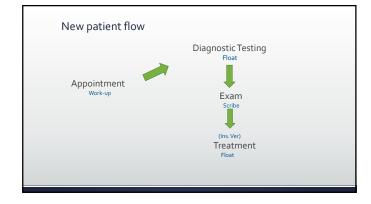




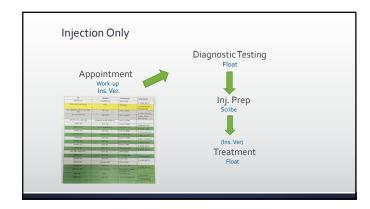
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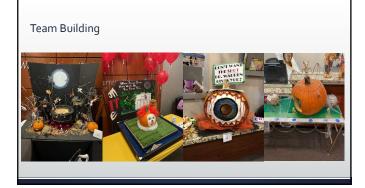






## Cooperation (Teamwork)

- Frequent meetings and updates to processes
- Each staff member understanding their role in the big
   picture
- Cross Training Keeps flow with staffing changes
- Checks and balances- Coding, Testing, Billing,
  Procedures
- TEAM BUILDING!!



#### Summary

- Practice Operational efficiency requires:
- Organization organizational design, structure and staffing to achieved desired goal
- Preparation Understanding and execution of tasks to allow for the efficient delivery of patient care services
- Teamwork Employees who understand their role (Feel supported) and have the processes in place to provide the best patient care

