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, F/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

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### 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 implementation
  - Routine review and renewal (reinforcement)

- Clearly defined flow
  - Established protocol
  - "Zone" concept emphasis

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### Float

- During down time that should be in the surgery scheduling office working on... (tasks ongoing)
  - Social media
  - Administrative tasks
  - General office tasks

- Float the Diagnostic room at the beginning of each day
- Alert the surgeon when patient is ready for surgery by calling or texting him
- Perform diagnostic testing, fundus, OCT, A & V, IVF, and ultrasound
- Communicate with surgeons
- Set up laser and pneumatic ophthalmoscope
- Lead the laser and pneumatic ophthalmoscope to the appropriate area
- Lead patients to the check-out desk
- Bring surgery report over to check out
- Relay messages to the doctor regarding incoming calls, contacts outside physicians at outside lab's request
- Clean equipment between each patient
- Clean & archive images for working rooms at the end of each day.
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)

Cooperation (Teamwork)

- The coordination of all service areas for the most efficient delivery of patient care.

Dependent upon:
- Processes - Allow for the accurate transfer of patient information (Clinical and Financial)
- A system of checks and balances to ensure implementation
New patient flow

Front Office ➔ Clinical Staff ➔ Insurance Verification ➔ Appointment

New patient flow

Appointment ➔ Work-up ➔ Diagnostic Testing ➔ Float ➔ Exam ➔ Suite ➔ One-Visit Treatment ➔ Float
Injection Only

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!!

Team Building
Summary

- Practice Operational efficiency requires:
  - Organization – organizational design, structure and staffing to achieve 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

Thank You!!!!