

# Communication Amongst Front Lines

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JOHNSON HEALTH CENTER

CHC LEADERSHIP INSTITUTE LEARNING PROGRAM 2017-18

CAPSTONE TEACH-BACK: JUNE 13, 2018



# Focus

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To improve the overall communication amongst the front lines at Johnson Health Center; specifically between front desk, call center & the clinical staff in order to better serve our patients.

# Team

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- Jade Brooks (PES): Patient Engagement Specialist
- Misty Elliot (HRR): Human Resources Representative
- Haley Vaughan (RC): Referral Coordinator
- Kathryn Barbier (LPN): Licensed Practical Nurse
- Alice Boyd (PA-C): Physician Assistant
- Dr. Sandra Ratliff (SP): Staff Physician

# Need

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We determined that Johnson Health Center had a discrepancy in communication between members of the front lines (front desk, call center), and clinical staff. This communication disconnect lead to frustration from clinical staff members, as messages sent through the electronic health record, hereby referred to as Telephone Encounters (TE's), sometimes were difficult to understand or were being sent to the wrong staff member. Issues with TE's frequently included: severely misspelled medical terms, lack of appropriate detail, no contact information, etc. Rather than approach the call center leads directly, clinical staff would bring up concerns within their own ranks and never communicate them to others with the ability to enact change.

A lack of honest and direct communication between the two departments has created a rift that negatively impacts the work flow of the office, relationships between staff, and ultimately creates a delay in properly serving our patients. By improving communication, patients will be more satisfied and less likely to repeat phone calls if their concerns are delivered appropriately with the first phone call.

# Objectives

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- **Improve overall communication among the front lines:**
  - Improve knowledge of medical terms, spelling of medications, and medical abbreviations.
  - Improve the fluidity of properly completing a Telephone Encounters (TE) through eClinical Works, the EMR of the office.
  - Improve understanding of urgent and non-urgent patient needs during a phone call.
  - Improve methods of addressing department concerns and issues by implementing standardized methods of communication amongst peers.
- **Improve the overall onboarding process to prevent future issues:**
  - Improve de-escalation training through Relias online training and live simulations.
  - Improve leadership guidance for new employees through a single point of contact.

# Action Strategies

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- Improve overall communication among the front lines by:
  - Implementing a Medical terms cheat sheet listing the most common medications, abbreviations & medical terms.
  - Implementing a TE guide sheet with step by step instructions for creating a TE, gathering the appropriate information, and indicating how to send the TE forward to the appropriate recipient.
  - Addressing department concerns in a more organized way by implementing a quarterly meeting between leaders of clinical staff and the front lines.
  - Initial objectives with pre-existing solutions:
    - Determining urgency of patient calls – Care Management triage
- Improve the overall onboarding process to prevent future issues:
  - Implement a new de-escalation training in Relias and create a live simulation training to be done yearly at all staff meetings.
  - Assign a specific “go-to” point of contact person for new employees.

# Assets

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- People

- Our main Leadership Team
- Extended team
  - Judy Ladjack- Chief Compliance Officer (CCO)
  - James Orr- Patient Scheduling Specialist (Call Center Supervisor)
  - Shanika Rose- Patient Assistance Specialist (Front Desk Supervisor)
- All Clinical Staff, Front Desk Staff, Call Center Staff

- Systems/Resources

- Survey Monkey- used to survey clinical and front lines staff to determine need and to provide a point of comparison after the cheat sheet has been implemented.
- Medical Cheat Sheet
- TE Guide Sheet
- Relias- online de-escalation training

# Team Development

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- Team Building
  - Meet regularly to work on project development and discuss new strategies.
  - Selected key leaders from JHC to coordinate with in order to sustain the project long-term.
  - Each team member had a designated role & completed their individual task prior to each meeting.
- Training
  - Attending Capstone Leadership Conferences
  - Attending Capstone Leadership Webinars
  - Implementing Cheat sheets into Call Center/Front desk Training
  - Researching ways to implement de-escalation training and better communication into the onboarding process
- Technical Assistance
  - Survey Monkey (survey tool)

# Testing & Refinement

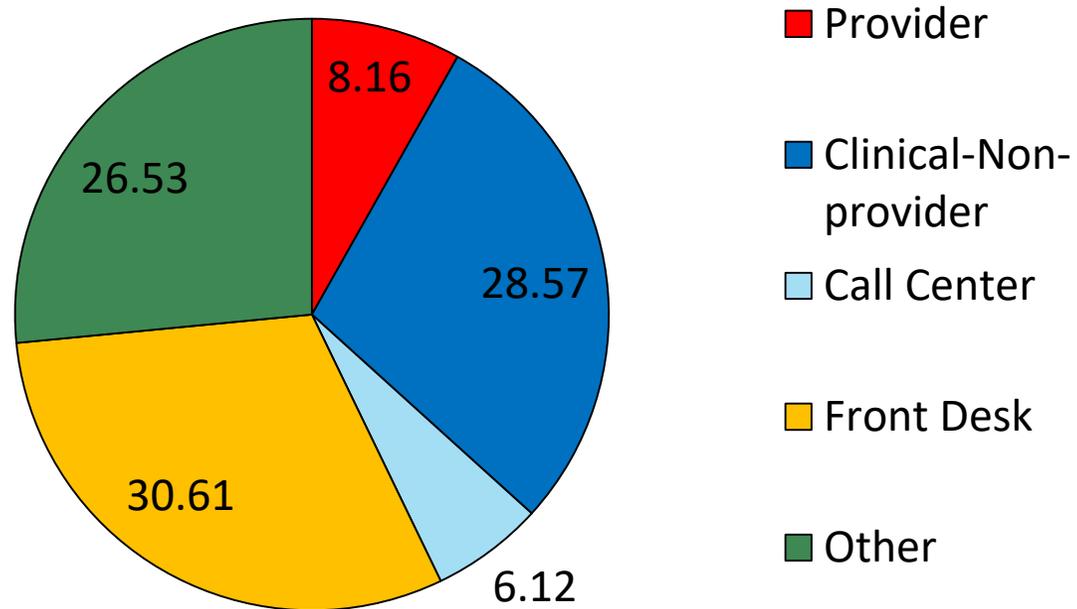
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- Survey Monkey Refinement
  - Sent initial survey out to all clinical, front desk, & call center staff with questions regarding the individual's interpretation of communication within the clinic and their personal confidence in TE routing and medical terminology. After we received the results, we realized that the survey had not tracked which employees had answered the questions in a specific way. We realized the results could be skewed if the majority of participants who took the survey if they were majorly clinical staff, etc.
  - Refinement: In order to refine this issue we added the question about which department the survey-taker worked in so that we could make sure we knew we were collecting data from a wide variety of departments to more accurately grasp the current state of our company's needs.
- While looking into mechanisms to better triage patients, we learned that the Care Managers had already implemented a system that was currently in use.
- Started an original TE cheat sheet, but discovered one already existed, and needed to be refined rather than remade.

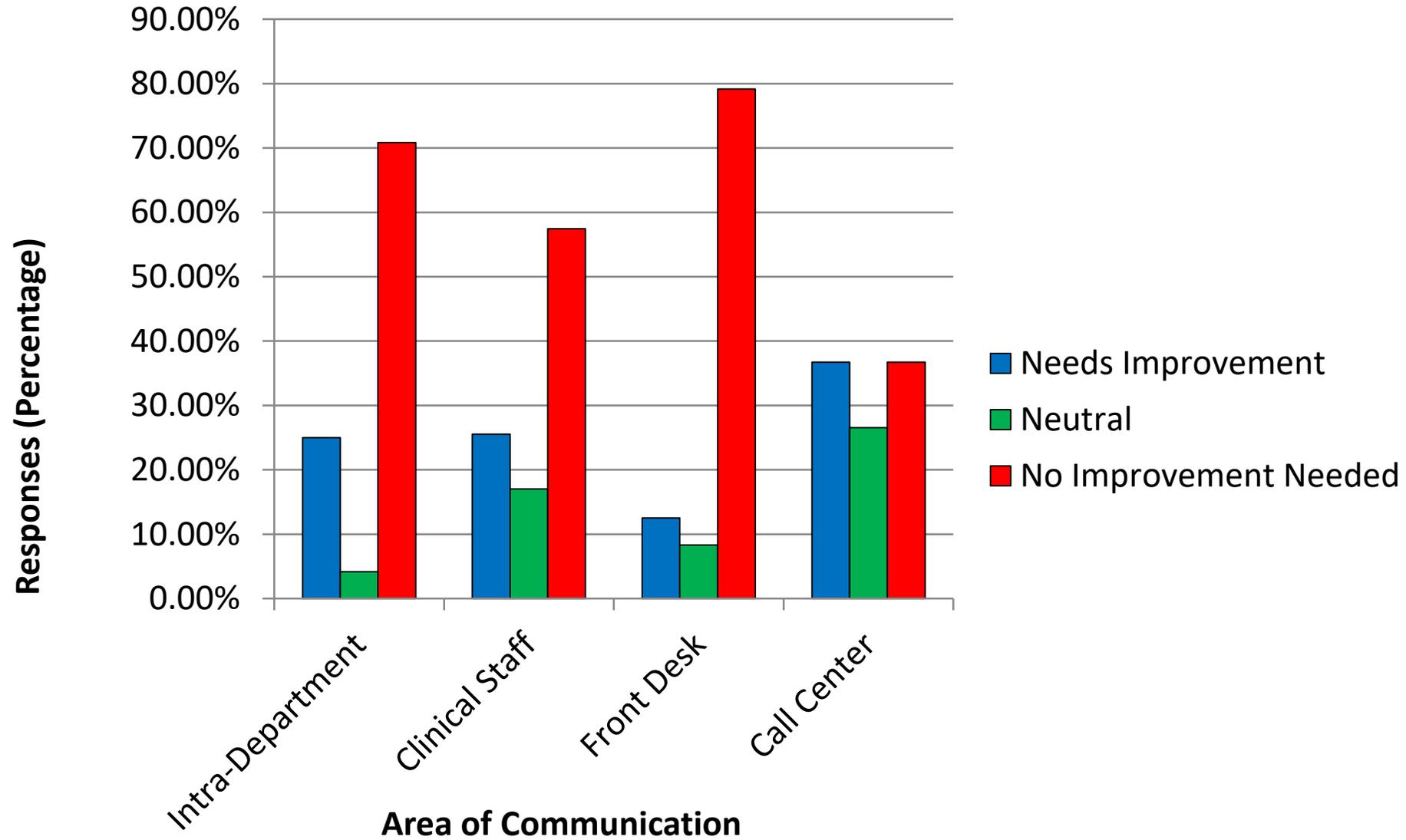
# Survey Monkey Results

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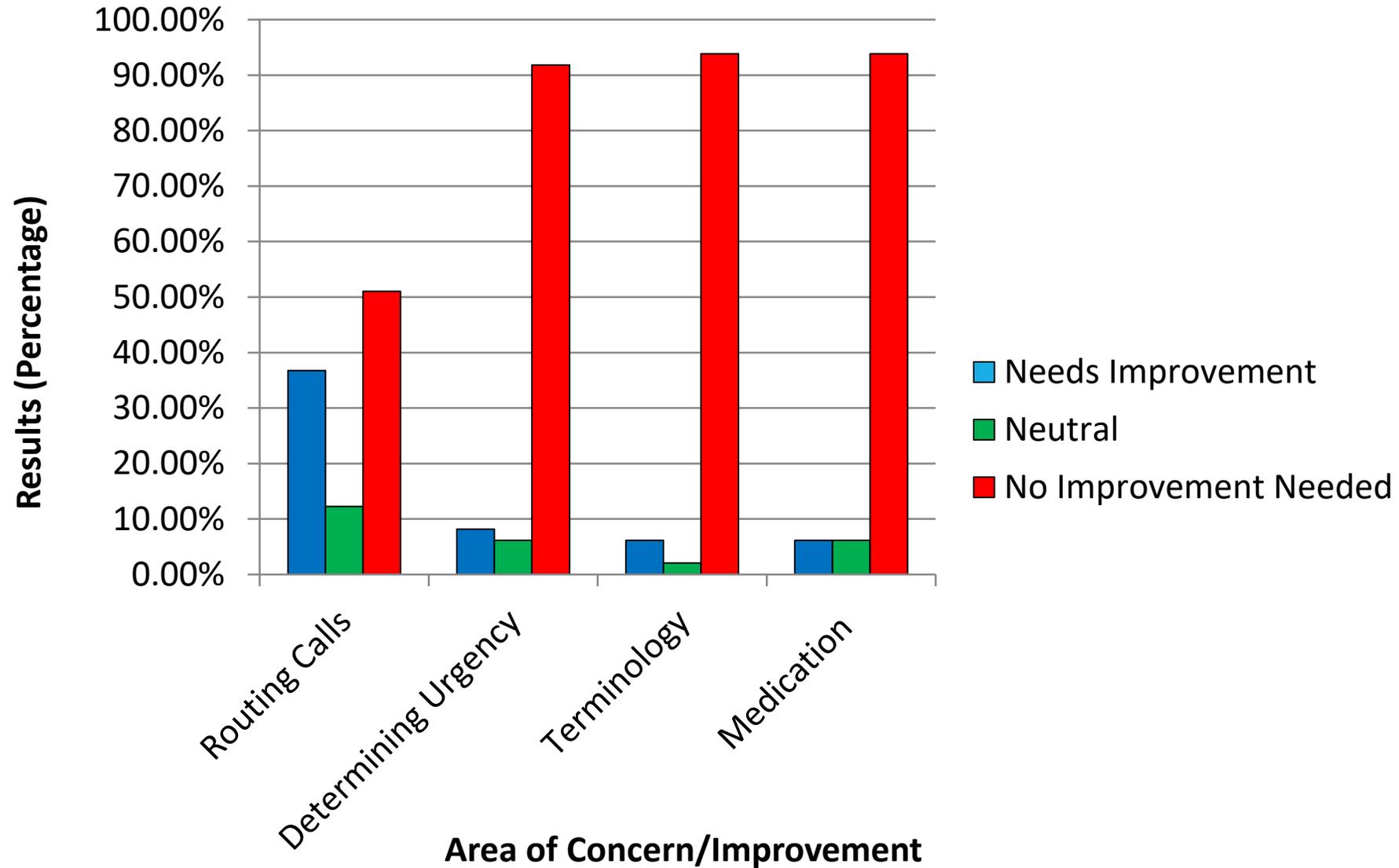
Department Participation %



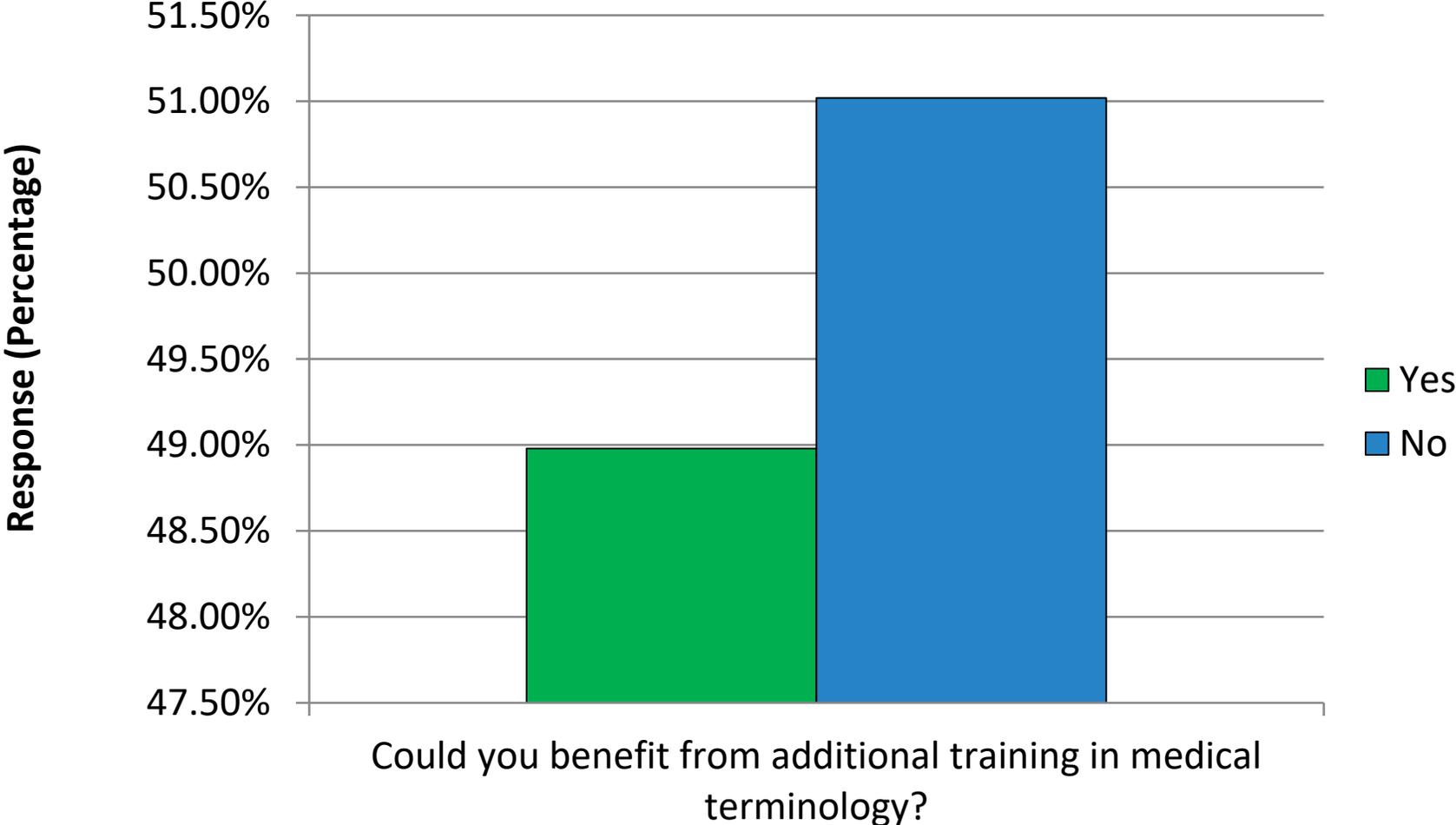
# Communication Within Departments



# Knowledge and Skills Needing Improvement



# Need for Additional Training



# Data Analysis

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## Communication

- Overall, survey participants felt that communication within their own department, with clinical staff, and with the front desk did not require improvement.
- Communication with the call center remains the area requiring the greatest improvement.

## Knowledge and Skills

- Overwhelmingly, participants felt comfortable with medical terminology, medication names and spellings, and how to appropriately determine the urgency of a patient call.
- Routing calls to the correct recipient remains an area needing improvement.
- Of note, the percentage of responses indicating a need for improvement regarding medical terminology and medications was the same – 6.12%, the same percentage of participants from the call center.
  - While the correlation cannot be proven at this time, this does warrant a future survey to be sent exclusively to the call center to definitively determine their comfort with the topics noted.

# Future Plans

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## Survey Monkey

- Send new surveys individually to each department (Clinical Staff, Call Center, Front Desk)
  - This will help us better understand the level of comprehension and comfort of each department rather than having one survey with mixed answers.

## Follow up:

- Follow up with the call center lead to determine if the Medical Terminology and TE cheat sheets are helping, and if they can be improved upon.
  - Include call center representatives in all monthly Care Team meetings at our multiple locations.
- Initiate quarterly meetings between leaders of clinical staff and the front lines to discuss issues and resolutions in communication.

# Conclusion

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- Communication must be improved between clinical staff and members of the front lines to improve work flow, effectively communicate patient needs, and create a more cohesive team. This requires all departments' participation and dedication to improvement.
- We have procedures already in place that could be better utilized.
  - Care Managers' triage system.
- Many survey participants feel that they would benefit from more onboard training when it comes to medical terms, proper spelling, routing phone calls, and de-escalation.
- By being direct with one another, we can create change more rapidly and effectively.
- Most importantly: Patients are better served when their needs are met in a timely manner when initial phone calls are addressed and directed properly the first time.
  - We will continue to improve our communication among departments to best serve the patients in our area.