



# Fundamentals in QI

## Webinar 1: Project Updates & Building on PDSAs

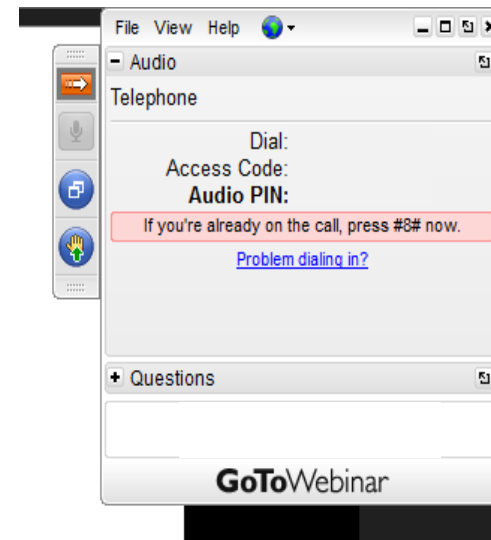
Thursday, November 13th

Webinar Recording will be available on  
[www.IHQC.org](http://www.IHQC.org)



# Questions About Your Project? Content from Oct 22<sup>nd</sup> workshop?

*Type them into the Questions Box and we'll address them during and at the end of the webinar*



# Today's Agenda

- Quick review of topics from our Oct 22 Kickoff Session
- Case Study of a Small Scale Project
- Themes from Project Updates and Work Plans
- Addressing Challenges
- Building on PDSAs
- Q&A
- Next Steps

# October 2018 Kickoff Session Review

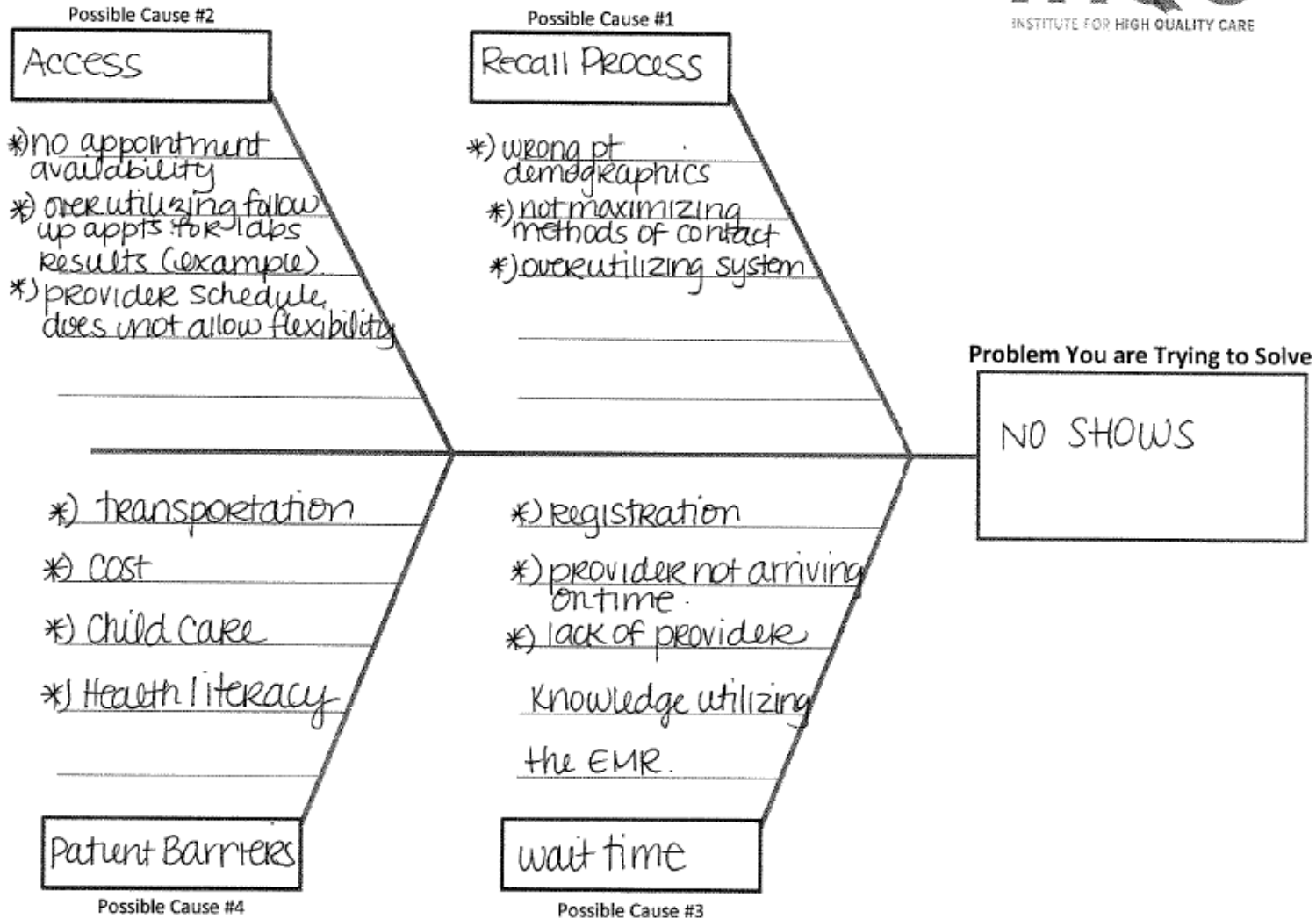
- Introduction to the Model for Improvement
- Problem Solving Tools and Techniques
  - 5 Why's, Brainstorming/Prioritization Matrix, Fishbone Diagrams, Workflow Mapping
- Defining and Visualizing Your QI Project
  - Logic Model/Project Map
  - AIM Statements
- Measurement to Inform Change
  - Outcome, Process, and Balancing Measures
  - Collecting baselines
- Small Tests of Change
  - PDSA's



# Case Study: The Small-Scale Improvement Project Impact



Cause and Effect (Fishbone) Diagram

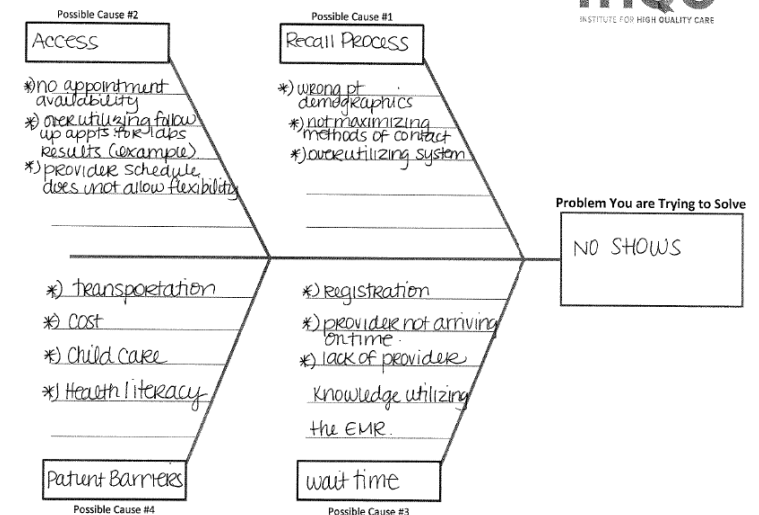


# Case Study: The Small-Scale Improvement Project Impact

How do you figure out what do start improving?

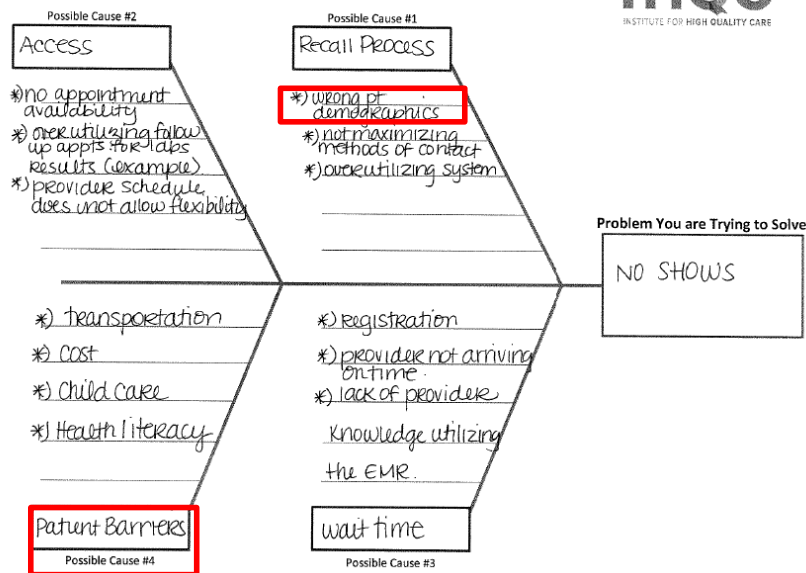
- 1) Confirm issue(s) with data
- 2) Survey staff – what do they think needs to be worked on first?
  - High impact, low cost/resources needed

Cause and Effect (Fishbone) Diagram



# Case Study: The Small-Scale Improvement Project Impact

Cause and Effect (Fishbone) Diagram



## Getting Data via Patient Surveys

- Call patients that no show'd to ask why they weren't able to make appointment, offer to reschedule.

## Wrong patient Demographics

- % patients called this week had wrong phone number
- Where do we confirm patient phone #?

## Patient Reminder Calls

- 1 day before vs. 2 days before appts; any difference in no show rates?
- Scripting for reminder calls
- No show rate, % of patients reached during reminder calls, % appts rescheduled

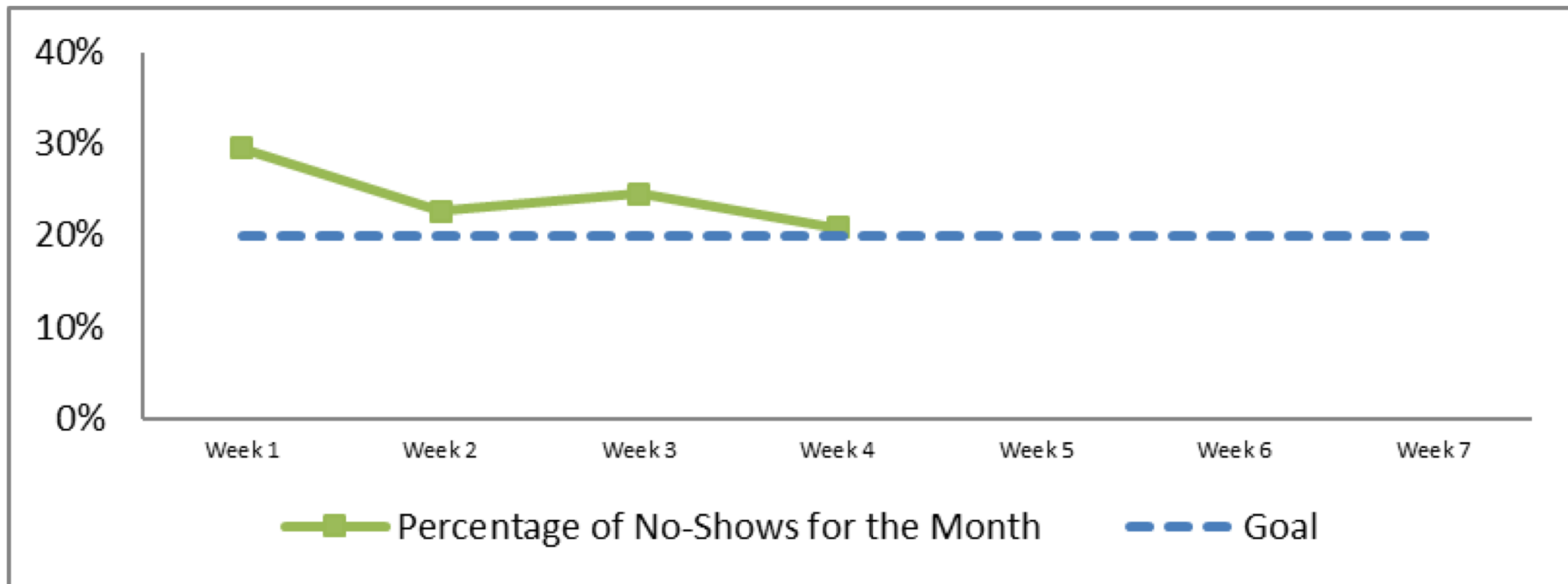
# Case Study: The Small-Scale Improvement Project Impact

## *Things that led to improvement:*

- Reminder calls 2-days before appt more effective than auto-generated reminders and texts
- Learned scheduling follow-up appointments for all lab results, patients wouldn't show up if test results came back without any issues -> change in clinic policy
- Call Center and Scheduling Staff excited to participate and share project results with management
- Since starting projects, care teams are seeing ~3 more patients per day

# Case Study: The Small-Scale Improvement Project Impact Using a Run Chart

- No show rate went from 31% to 21% in 5 weeks (over holidays)



# Review of Homework from Oct 22nd

## 1. Create a measurement plan

- *Clearly defined measures, confirm baseline data and realistic target goal*

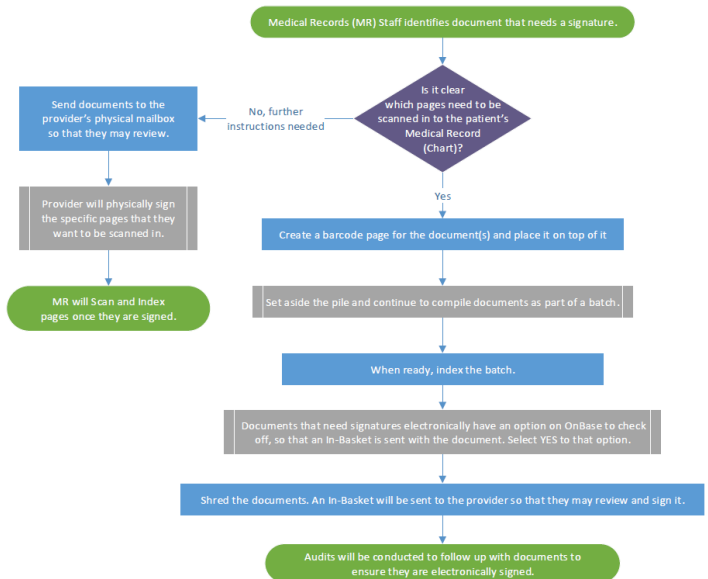
## 2. Start Testing PDSAs

## 3. Photo of Process Flow Map

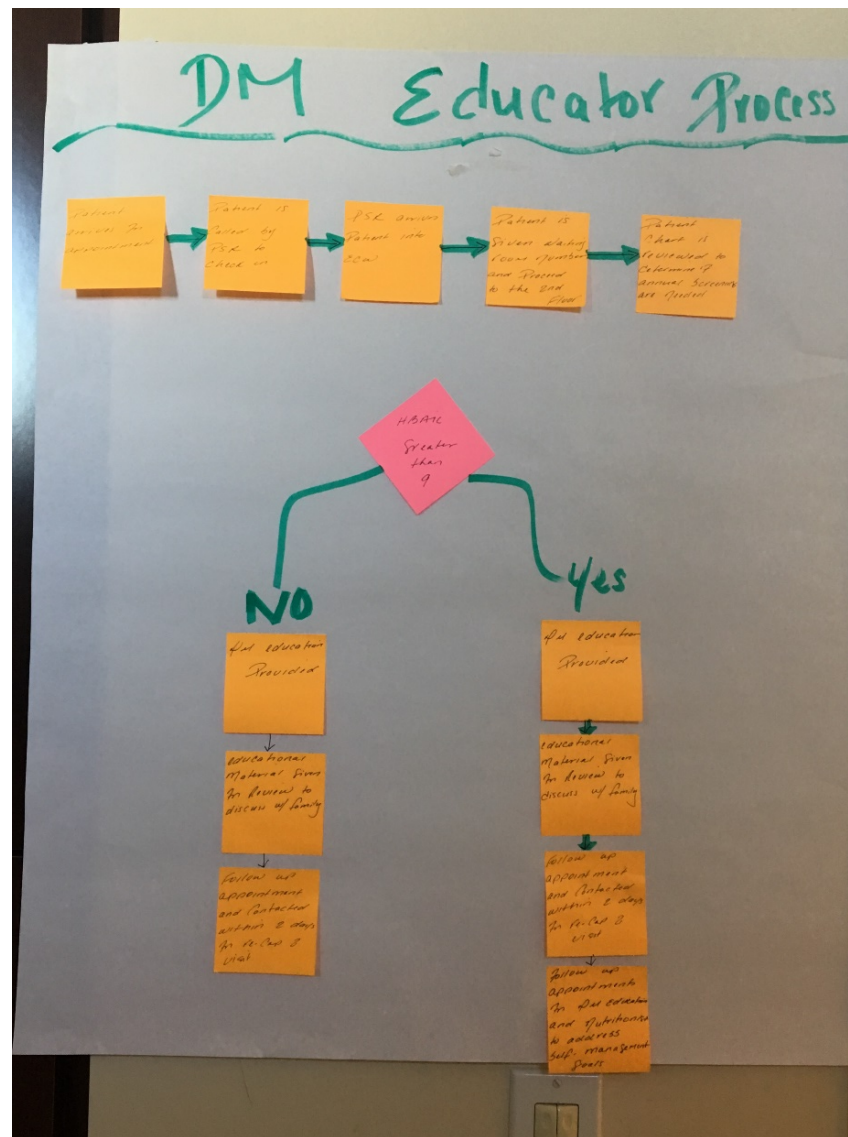
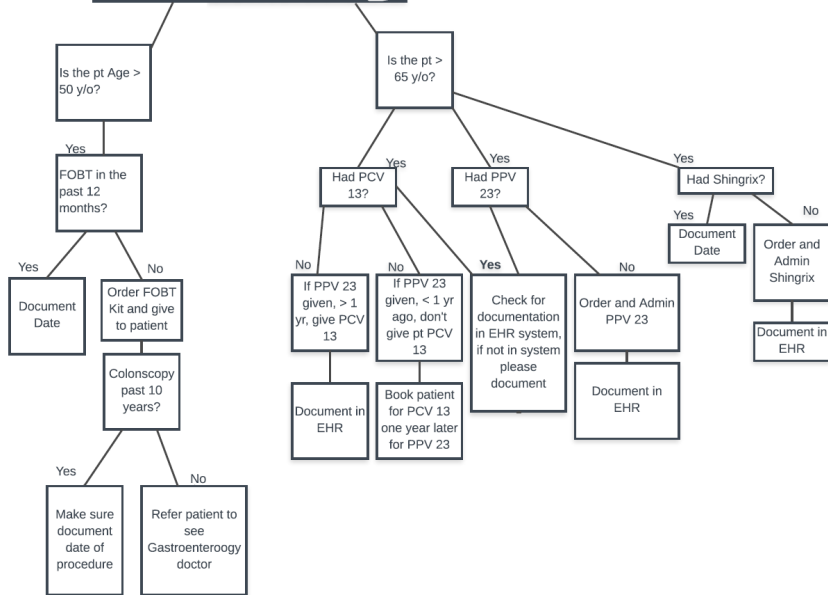
## 4. Continue to use improvement tools

- Fishbone Diagram
- Flow Charts
- Logic Models

On-Base Medical Record Workflow - Draft



Male Patients at



# Project Updates - Themes

- Aim Statements:
  - Confirming baseline data & Setting realistic goals
  - *By Dec 31, 2018, we will increase the % of patients between the ages of 50-99 who have been screened for CRC at the Family Health Clinic from 45% to 50% through improved outreach and education.*
- ***REMINDER: Update your Aim Statements w/ baselines and goals***

# Project Updates - Themes

- **Current state analysis & problem identification**
  - How long does the process take us
  - Staff assumptions/baseline knowledge
- **Initial PDSAs:**
  - Confirming baseline data
  - Test ability to reliably track data electronically
  - Generate reports in a timely manner
  - Huddle and referral workflows
  - Testing knowledge and comprehensiveness of standing orders/screening guidelines

# Project Updates – Themes

*Defining and distinguishing between your outcome and process measures*

## Outcome Measures

**Actual results/outcomes of care we provide.**

### **Examples:**

- Infants immunizations
- HbA1c levels
- Cycle time
- No-show rate

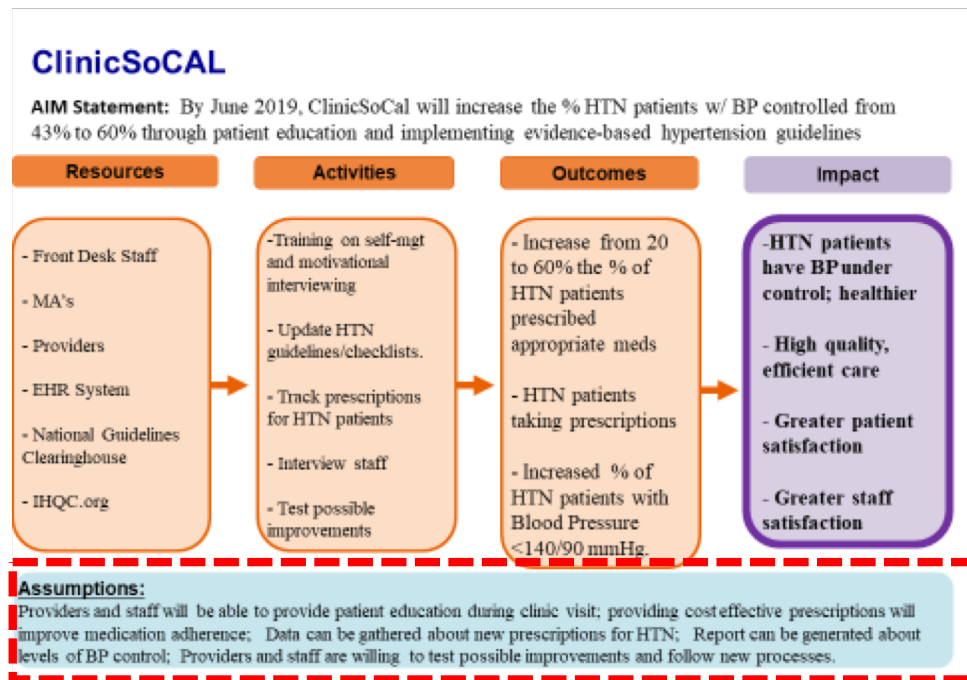
## Process Measures

**What are we doing to get improvements in our outcome measure(s)?**

### **Examples:**

- # of reminder phone calls made
- % reminders flagged in EHR for patients due for immunization
- # of completed checklists

# Checking Our Project Assumptions



- Some of the project assumptions we had are proving more difficult than we anticipated –
  - Finding the time
  - Getting provider buy-in
  - Getting frontline staff buy-in
  - What the capabilities are of our IT systems to track info and generate reports

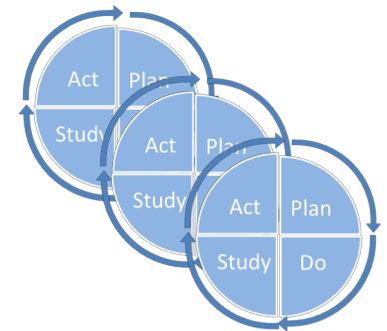
# ~~Initial Challenges~~ *Opportunities*

- **Data and Technology**
  - Challenges collecting data
  - Reports – incomplete, incorrect
- **Staffing and Buy-in**
  - Am I in trouble?
  - Reconfigure workloads, finding time
  - Getting team buy in – and scaling down improvement project
- **Outreach & Patient Engagement**
  - Need updated patient education, instructions for referrals and warm handoffs

# Considerations Moving Forward

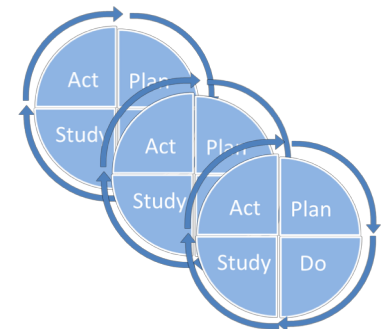
- **Data and Technology – Leveraging the Systems We Currently Have**

- What can we collect that will convince staff that changes lead to an improvement?
- Manual data collection, checklists, forms



- **Screenings & Standing Orders**

- Staff training and awareness
- What visual reminders can we create to help staff remember standing orders after the training?
  - Checklists, alerts in EHR, flag patients charts during huddles, education posters in exam rooms
- Scripting for staff on educating patients about importance of that screening



# Considerations Moving Forward

- **Huddles and Refined Workflows**
  - Who's involved in huddles? Who leads huddles? Is there a huddle checklist for care teams to reference for reminders of key items to review
  - Creating current state workflow maps for front office and back office processes, test opportunities to eliminate wastes.
  - Asking staff for ideas - looking for ways to improve cycle time, reduce redundancies

# Getting Staff/Team to Buy-in



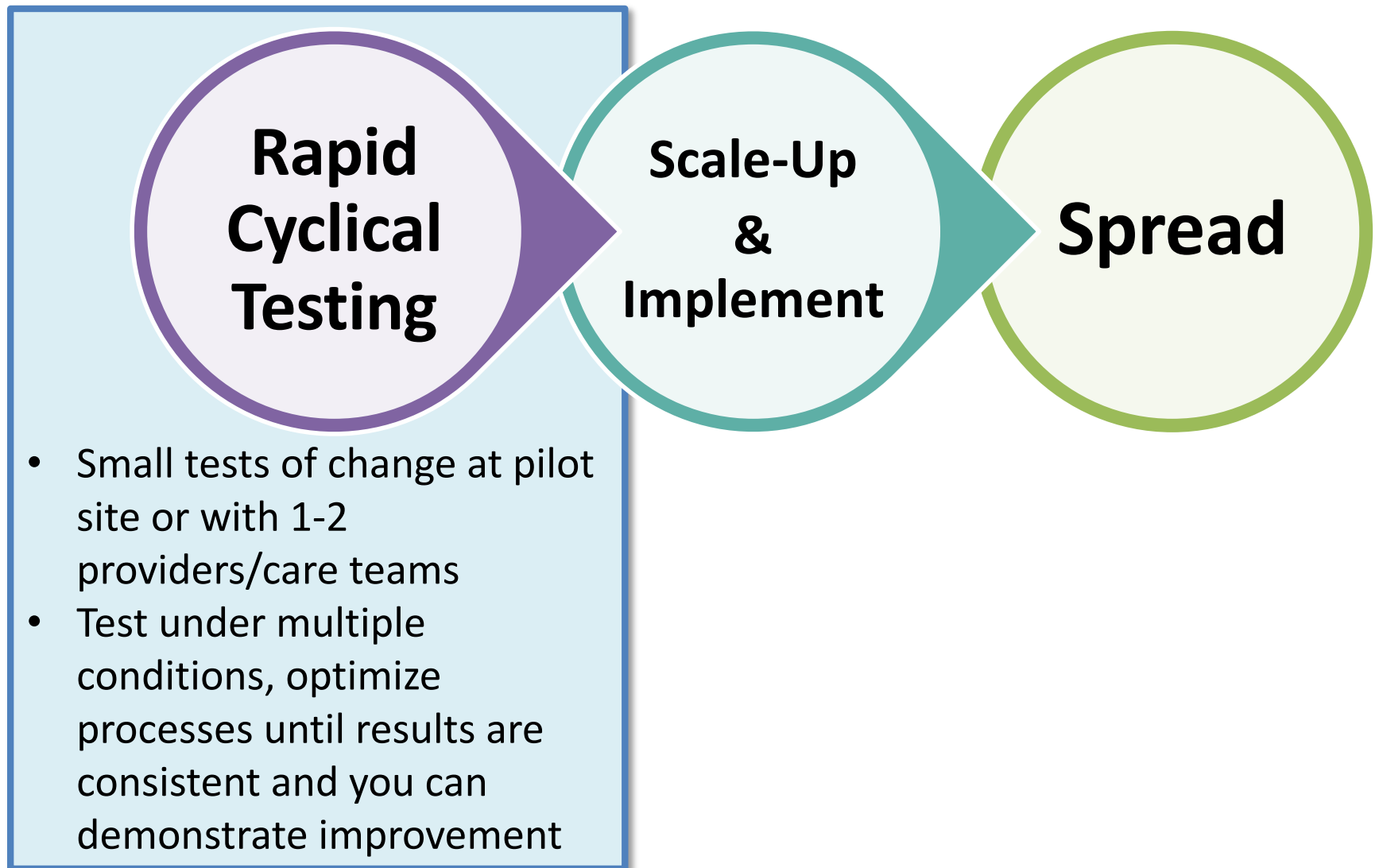
WIIFM –  
What's In It For Me



# Other Questions/ Challenges?



# Improvement Timeline – TEST FIRST



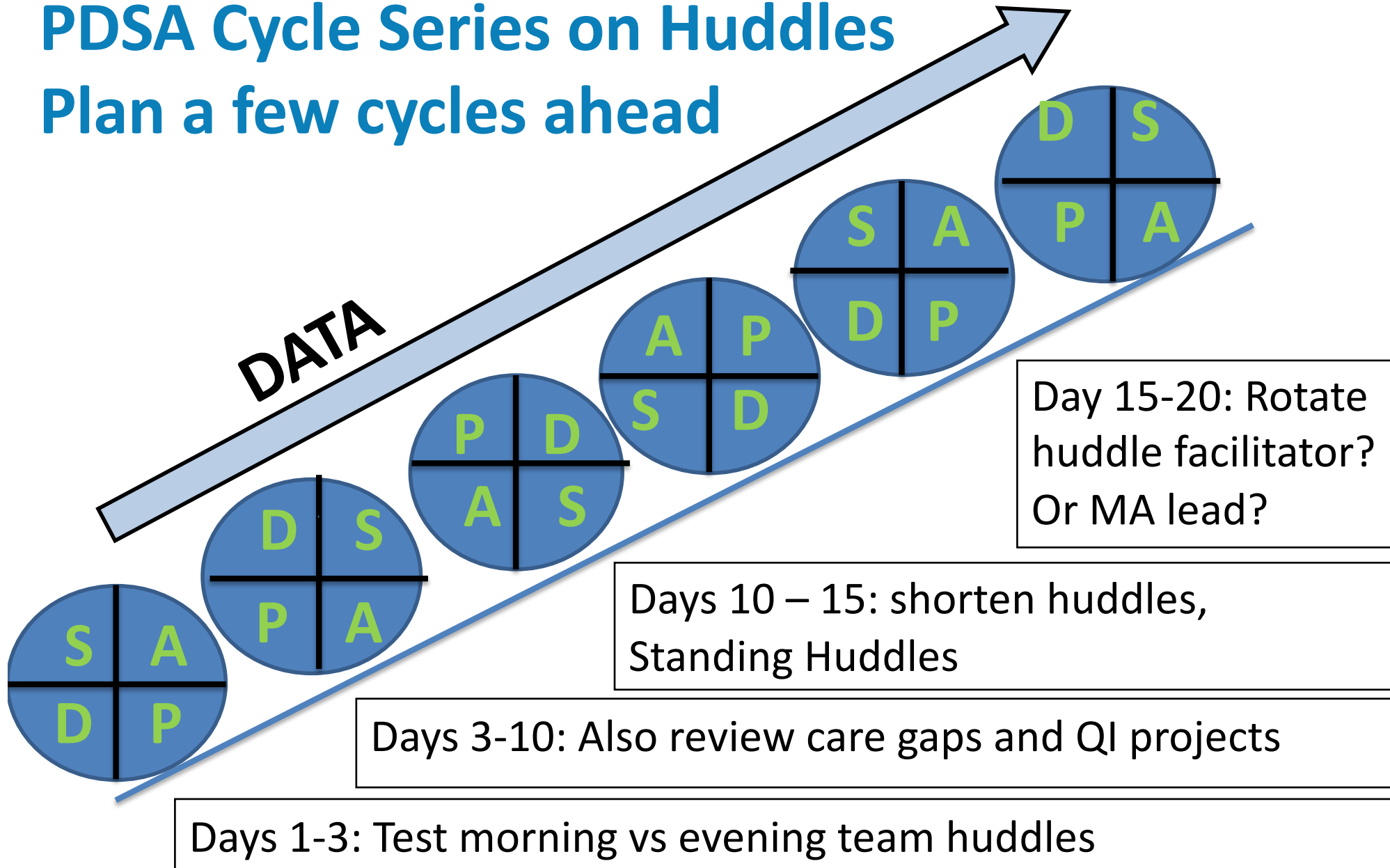
# Building On Your PDSAs

- Pre-visit planning
- Reminder calls
- Referrals to nutritionists
- Patient education materials
- Getting staff involved in PDSA tests

➤ ***How can you break up your change ideas into small enough pieces that you can have staff test something tomorrow morning***

# PDSA Cycle Series on Huddles

## Plan a few cycles ahead



# PDSA Checklist

- Embrace the PDSA, small test of change mindset**
  - “Tweak your week;” “What can we test tomorrow morning?”
- Scale Down - start with a tiny test**
- Collect useful data during each test**
- Think a few tests ahead & test under a variety of conditions**
- Reframe tasks into tests**

# Measuring Your Improvement Project

- **Outcome & Process Measures**

- Tracked throughout the entirety of your project
- Remain consistent
- Weekly/monthly basis

- **PDSA Measures**

- Tracked every day / with each PDSA you test
- **Data/Info tracked changes daily** based on PDSA and what specific changes you're testing.

# PDSA Measures for No Show Rate

*Data collected from each reminder call effort (PDSA)*

PDSA	Data
<b>#1: Reminder calls between the hours of 7am-9am</b>	# of patients that we successfully reached with our reminder calls
<b>#2: Reminder calls using revised script</b>	# of patients who understood the message and came in as a result of call with revised script
<b>#3: Reminder calls between 12-2pm</b>	# of patients that were available and answered during this lunch period?
<b>#4: Reminder calls 2 days before appointment</b>	# of patients who came in for appointment vs # that still no-showed

# Improvement Project Checklist – Month #1

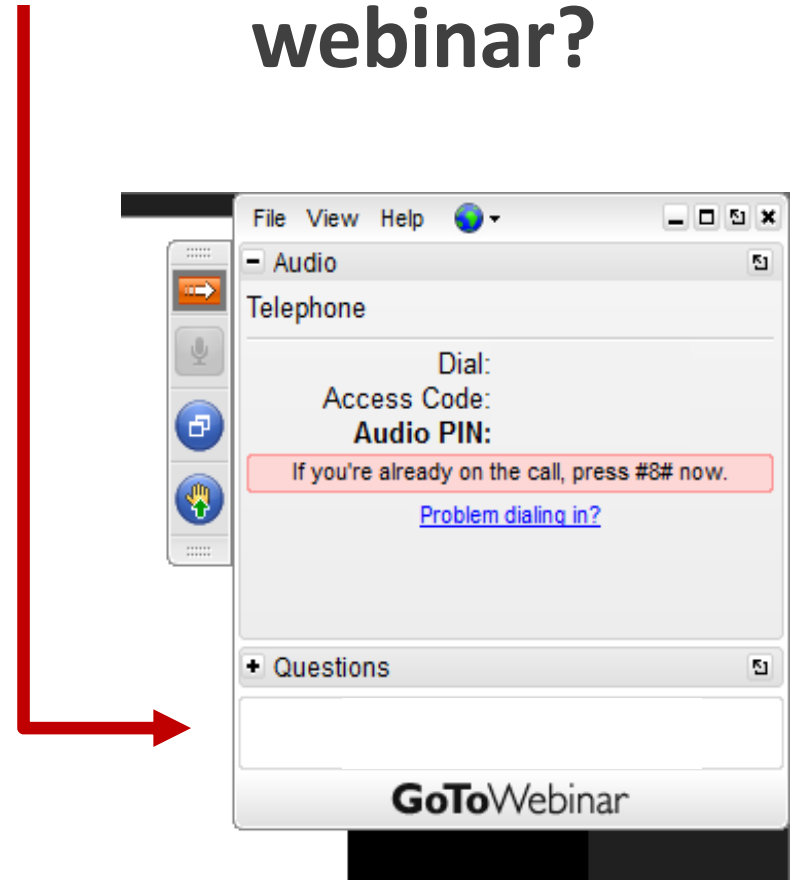
- ✓ Confirm you have a reliable way to generate data for your measures on daily/weekly basis – aiming for at least 2 data points for each project measure
- ✓ Team reconfiguration – are people impacted by the improvement efforts on your team?
- ✓ Hold weekly team check-ins
  - Share baseline data and data collection strategy
  - Brainstorm PDSAs to test, review data, plan next steps
- ✓ **Test, test, test**
- ✓ **Celebrate early successes**

# Improvement Project Checklist – Month #2

- ✓ Continue to test, test, test
- ✓ Have at least 4 data points for each of your project measures
- ✓ Test ways to accelerate improvement –
  - What other conditions or variables could you test?
  - How can you get frontline staff more involved in the improvement work?
- ✓ Continue to hold weekly team check-ins
  - Share baseline data and data collection strategy
  - Brainstorm PDSAs to test, review data, plan next steps
- ✓ **Keep an eye out for stories of impact**



# Questions About Your Project? Content from Oct 22<sup>nd</sup> workshop? Content from this webinar?



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# Fundamentals In Quality Improvement

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Course Materials

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Kickoff Session

# *Calendar Updates and Next Steps*

## Register for Upcoming Events

- **Wed, Nov. 28<sup>th</sup>: Webinar #2 -Using Data to Tell Your Improvement Story**  
<https://attendee.gotowebinar.com/register/5112594223993981698>
- **December 14<sup>th</sup> – In Person Closing Session at The California Endowment Building – Communications, Change Management, Accelerating Change**

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