Checklist for Success – How to Add a New Procedure or Service and be Successful Before During & After!

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FINANCIAL INTEREST DISCLOSURE

› Member – Care Credit OSC

I’m so Glad I work in Ophthalmology!
To List or Not to List

- Avoid past failures
- Assist with Memory Recall
- Ensure success
- Outline individual responsibilities
- Easy to track progress

Check it again and again!

- Breaks it down – general outline and then incremental baby steps
- Minimum steps necessary
- Share with staff to ensure success – get their buyin!

Adding a New Procedure

Dry Eye – Center of Excellence
Oculoplastics
Contoura™ Vision

Or – I have got the itchy burns eyes and I don’t know what to do....

SAN DIEGO’S DRY EYE CENTER

DRY CENTER OF EXCELLENCE

Dr. J. have got the itchy burns eyes and I don’t know what to do....
Start a Check list – consider the following

- Procedure – name?
  - Dry Eye Center of Excellence
- Provider – which doctor is most passionate or involved?
  - Meet with the provider and discuss steps
- Staff – start a committee
  - Meet with them – get their opinion

Equipment needed:
- Cost
- Financing
- Purchasing

Resources needed:
- Staff (tech, admin, counselor, provider)
- Rooms (space needed)

Use Excel

Keep minutes and send communication

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Checklist continued

- Design the flow of the procedure
  - Footsteps through the office
  - Front desk, Techs, Doctors, Counselors, procedure, checkout – time necessary to perform all functions
  - Will it happen all at once?
  - Series of visits – time and footsteps needed for each one
  - Will it occur in the same space each time or various areas of the office
  - How does that effect the flow of the clinic?

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Checklist continued

- Contact Malpractice Carrier (if necessary to add service)
- Determine CPT codes to be used
  - (office visits and procedures)
  - Look at ASOA list serv – anyone talking about this?
  - What issues have they encountered – make it easier on yourself!
- Forms needed
  - EMR – Paper charts
  - Consent forms
  - Payment agreements
Checklist continued (on and on..)

- Advertising/Marketing
  - Patient information – education
  - Staff information – education (in-services!)
  - Brochure
  - Website & social media
  - Videos – animation (Eyemaginations or your own)
  - More staff education
  - Provider training – certification
  - How best to promote service externally to your community?
  - More staff education

Make sure to Start with your Website!

WHAT IS LIPIFLOW®?

**THE DAY OF YOUR LIPIFLOW® PROCEDURE:**

1. PRIOR TO ARRIVAL:
   - A BADGE WILL BE ISSUED TO THE PATIENT.
   - PLEASE HAVE THE PATIENT WEAR THE BADGE AT ALL TIMES DURING THEIR VISIT.
   - A PHOTO ID MAY BE REQUIRED TO VERIFY PATIENT'S IDENTITY.

2. PRIOR TO THE PROCEDURE:
   - THE PATIENT WILL RECEIVE INSTRUCTIONS ON WHAT TO EXPECT DURING THE PROCEDURE.
   - THE PATIENT SHOULD BE IN A COMFORTABLE POSITION DURING THE PROCEDURE.
   - THE PATIENT SHOULD NOT BE UNDER THE INFLUENCE OF ALCOHOL OR OTHER DRUGS.

3. DURING THE PROCEDURE:
   - THE PATIENT WILL BE ASKED TO RELAX AND BREATH SLOWLY.
   - THE PATIENT WILL BE EXPOSED TO A LOW-INTENSITY MAGNETIC FIELD.
   - THE PATIENT MAY FEEL SOME LIGHT PRESSURE OR TENDERNESS.

4. POST PROCEDURE:
   - THE PATIENT SHOULD AVOID EXERCISE OR STRAIN FOR 24 HOURS.
   - THE PATIENT SHOULD AVOID DIRECT SUNLIGHT OR HEAT.
   - THE PATIENT SHOULD AVOID WATER OR ANY SUBMERSION.

ENJOY YOUR REFRESHED EYES!

[Website Image]

[Website Image]

[Website Image]
Checklist continued

- Where are the patients coming from?
  - Current patient base?
  - Outside Referrals?
  - Advertising?
- Cost Analysis
  - Reimbursement
  - Cash versus Insurance
  - Cost of Goods – Time – Space
  - Competition pricing – & and numbers competing

Checklist continued

- Getting the Facility Ready
  - Plans
  - Construction
  - Equipment Installation
    - Space
    - Electric
    - Data

Checklist continued

- Equipment Training
- Educate, Educate and more Education
- Set up Maintenance Schedule – who’s in charge of what
Checklist continued

- Launch Day
- Educate Staff – Re-educate Staff
- Role Playing with Staff
- Listening to staff discuss procedure
- Ask them to explain it in their own words
- Afterwards – Discuss with patient’s, providers and staff – how was your experience?
- Modify as necessary
- Continue to check in

Patty Casebolt, Clinical Director

FINANCIAL INTEREST DISCLOSURE

- Member – Care Credit OSC
- Casebolt Consulting
Successful Launch... Now What?

Checklist for success – How to add a new procedure or service and be successful before during & after!

What Every Successful Launch Includes

A Must Read–

THE CHECKLIST MANIFESTO
HOW TO GET THINGS RIGHT

ATUL GAWANDE
Why bother with Checklists...

"We are all plagued by failures—by missed subtleties, overlooked knowledge, and outright errors. For the most part, we have imagined that little can be done beyond working harder and harder to catch the problems and clean up after them"

Quote from The Checklist Manifesto

Example of LASIK measurement checklists

Example of new provider checklist
Example of new provider checklist continued...
Meetings

Goal

Understand our communication structure and expectations.

Put all meetings in your calendar.

Board Peer review
All provider

Introduce yourself with presentation at next All Staff Department

Business development

Operations/Senior Management

Managing partners/mentors

‐ once a month for each

Regular check ‐ ins with your lead

Review blue book financial summary (within 1st month)

Review blue book financial summary (2nd month)

Mentor

Accountable Communication Training

Support

Attend New Employee ACT Mentor our culture of accountable open Annual MD retreat Teambuilding (6 months after starting)

Review the process Review ACT articles

triangulation

Making and keeping agreements

Stop / start / continue

Risk Management

Goal

How to practice safe

Review of MEC risk management (customer care team) and peer review program including peer review forms

Read OMIC article on cataract surgery risk management

15 min meeting w/Tom to discuss peer review

What to do if you get sued ‐ what to expect ‐ don't think it won't happen to you

Oregon Medical Board/comanagement guidelines

Review of Dr. and Dr. A cases

Review process for new procedures including codes, pricing, TDC, equipment & supplies

Trust but Verify....

Mystery Shopping the Patient Experience

A TH white paper with Kristin Baland, Eprint Consulting June 2008

Telephone Improvement Program
Mystery Shopping Questions

**Phone Call**
- How easy is it to schedule an appt by phone?
- How long did you wait on hold?
- Did you feel the person was knowledgeable about the services asked for on the phone?
- When inquiring about a treatment or procedure, did the staff have a good idea of what treatments are provided?
- Did they credential the providers
### Mystery Shopping Questions Continued…

**Office**
- How are your first impressions of the spa/office?
- Were you greeted warmly?
- Did the receptionist make eye contact?
- How long did it take to get greeted?
- Were you offered water, tea, coffee?
- Did the staff look and perform in a professional way?
- Does the office seem inviting or too busy?
- Did the technician explain the products, or is it easy to shop?
- Did the optical staff assist you in a professional manner?
- Did you feel the selection of frames/lenses was satisfactory?
- Did you feel the selection of frames/lenses was satisfactory?
- Were you told about LASIK?
- Were you told about the medical Spa?
- Were you asked to schedule a follow up appointment?
- Were your insurance benefits explained?
- Did you feel the technician was competent, why or why not?
- Did you feel the optical staff was competent, why or why not?
- Did you feel the optical staff was competent, why or why not?
- Were you offered Care Credit?
- Were you offered a new glasses prescription?
- Were you given a new glasses prescription?
- Were you given a new glasses prescription?
- Were you told about the optical warranty policy?
- Were you offered Care Credit?

### Mystery Shopping Questions Continued…

**Optical**
- Did the optical staff assist you in a professional manner?
- Did the optical staff make a specific recommendation for frame/lenses and explain the benefits?
- Were you insurance benefits explained?
- Did the optical staff describe the difference in quality between brand x and what we offer?
- Did you feel the selection of frames/lenses was satisfactory?
- Were you told about a budget line of frames/lenses?
- Did the staff explain the optical warranty policy?
- Were you offered Care Credit?
- Were your insurance benefits explained?
- Did you feel the selection of frames/lenses was satisfactory?
Case study–why to measure...

1990–2014 Very successful LASIK program and A+ tracking system. 75–98% call to consult conversion

2015 – Upgrade to new PM system– unable to get reportable numbers for one year.

?? LASIK call to consult conversion rate?

Case study–why to measure...

Review of 2015 conversion rates revealed call to consult conversion had slipped from 75% to 35%.

Surgical Volume had stayed the same.

Leads had increased, but because we weren’t able to measure, we didn’t realize the significant opportunity cost of our decreased conversion rates.

Secret to success....

Prepare- checklists
Verify
Measure