Wellness Strategies for a Healthy Practice Team

Vivian Hernandez-Trujillo, MD, FAAAAI
Allergy and Immunology Care Center of South Florida
Director, Division of Allergy and Immunology Nicklaus Children’s Hospital
Fellowship Training Program Director, A/I
Miami Lakes, FL

Conflicts of Interest

• Member of AAAAI Practice Management Committee
• Member of AAAAI PMW Planning Committee
Overview

• Recalibrating Work Hours
• Staggering Work Hours
• Split Days
• Job sharing
• Lunch breaks
• Staff Involvement
• Thank you

New challenges

• Pandemic has created new challenges

• Staff fear of loss of hours or loss of employment

• Some organizations laid off all allied health providers, other large physician groups fired all medical assistants
Recalibrating Work Hours

• During early pandemic, changes to schedule were drastic - decreased volume of patients and actual patient care hours may have decreased

• All employees worked from home for two months - some challenges - internet issues

• One employee continues to work from home - insurance verification, visit confirmation

• Flexible hours for at home staff - early morning or later evening - work better for confirmation calls or contacting insurance companies

Staggering hours

• Flexibility is key

• Recalibration is important, as often as needed

• Some employees may prefer early morning hours, start before 8 am and leave before 4 pm

• Others may prefer coming in later, and able to stay later - “Win-win”

• Opportunity to expand office hours - positive for patient care

• Have time clock or some way to keep track of hours
Split days

• Days from home - Telemedicine only

• AM In office patients
• PM Telemedicine

Job sharing

• Full time is not preferred by some employees

• Job sharing benefits: Employees work together to share skills and time, Cross-coverage in case of emergency is built in

• Part-time staff that alternate or split days - MD, RN, MA
Lunch breaks

• Team takes lunch at staggered times

• Everyone eats in a different location thanks to pandemic

• Buying breakfast or lunch for staff periodically as thank you

• Celebrate birthdays, special occasions - Graduation, Passing boards

Involve Staff

• Keep track of staff morale weekly

• Ask staff if they have ideas - what works well or what does not work

• Ideas for what can work better

• Staff needs our emotional support as well
Thank you

- A simple thank you regularly goes a long way for staff

- Remember everyone has been through a lot during the pandemic storm, but some people have a better boat to keep them afloat than others

Take Home Message

- Wellness should be at the forefront

- Pandemic has created new challenges

- Involve Staff

- Importance of wellness checks
Wellness Strategies for a Healthy Practice Team

Vivian Hernandez-Trujillo, MD, FAAAAI
Allergy and Immunology Care Center of South Florida
Director, Division of Allergy and Immunology Nicklaus Children’s Hospital
Fellowship Training Program Director, A/I
Miami Lakes, FL

Overview

• Optimizing Telehealth
• Workflow Essentials
• Telehealth Etiquette
• Creating Workflow
• Measure Success of Telehealth
• Sample Workflows
Telehealth

• New opportunities to provide patient care exist

• Many practices went from full in office to entirely Telehealth within days

• What works for one practice may not work for another

• The public health emergency is in effect until July 2021 - Biden administration likely extended through end 2021

• Consider how you will continue virtual visits

Optimizing Digital/Telemedicine Services

• Decide whether you will do full Virtual visits and In office days or mix

• What works for one practice may not work for another

• Large practice versus smaller practice may have different needs
Optimizing Digital

- Technology can lead to burnout - use of scribe, dictation for some, EHR auto text and order sets to make like easier
- Automated appointment reminders

- Ensure documentation is complete to provide information required for billing - Start and End time, Document “via Telemedicine visit” from “location” and who was present, Consent obtained

Choosing the platform

- Available through HER, billing software companies, doximity, doxy.me
- Free version and paid versions available - HIPAA compliant
- Some have contracts by month or year - per provider or for office
- Online forms through platform - free HIPAA compliant forms jotforms.com
- If one does not work, you can change
Resources

• AMA Telehealth Implementation Playbook- excellent resource


• Workflow sheets available
GENERAL CONSIDERATIONS
- How will the telehealth technology integrate with the EHR if it isn’t through your existing EHR setup?
- How will clinicians document telehealth visits?
- How will telehealth visits fit into the clinic’s block schedule?
- Where will telehealth visits take place in the clinic (e.g., administrative office, specific exam room)?
- How do patients know how to access telehealth (e.g., through EHR care coordination, patient portal or phone)?
- How do patients book and cancel telehealth appointments?
- How do patients learn more about telehealth (e.g., designated staff, website, email)
- How do patients register for telehealth?
- What reimbursement models make the most sense for your practice (e.g., bill insurance, flat fee for patient)?
- Who will keep track of developing reimbursement policies?
- Are the appropriate codes available in the EHR system?
- Do the care team members know what documentation is required for telehealth billing?

Key Considerations When Designing a Telehealth Workflow (Cont.)

PRE-VISIT
- Identification
- How will digital patient intake be completed (on-site or remotely)?
- How do patients confirm their appointment?
- How will patients access the patient portal or on-site appointment?
- How will the patient know whom to contact or how to contact the provider?
- How will they know if they are eligible for telehealth appointment?
- How do we ensure the patient knows whom to contact?
- How will the clinician perform the initial encounter?

DAY OF/DURING VISIT
- Administration
- How will the patient check-in for their appointment?
- How will the virtual appointment be conducted?
- How will the patient receive the virtual appointment reminder?
- How will the patient be able to schedule an appointment?
- How will the clinician ensure the patient understands the appointment?
- How will the clinician ensure the patient is prepared for the appointment?
- How will the clinician ensure the patient understands the appointment?

POST-VISIT
- Clinical
- How will the patient follow-up?
- How will the patient be contacted after the appointment?
- How will the patient receive the follow-up?
- How will the patient be notified of their appointment?
- How will the patient be notified of their appointment?
- How will the patient be notified of their appointment?

Managing Coding and Billing
- How will insurance be billed?
- How will insurance be billed?
- How will insurance be billed?
- How will insurance be billed?

Telehealth Workflow Example

Your telehealth workflow will vary depending on your organization, type, size, and structure.

SCHEDULING FIRST TELEHEALTH APPOINTMENT

PATIENT
- Provides order for telehealth appointment
- Provides electronic consent

ADMIN
- Schedules telehealth appointment with patient
- Manages authorization

PHYSICIAN
- Receives appointment reminder
- Receives link to access telehealth appointment through patient portal

DAY OF/DURING VISIT

PATIENT
- Receives appointment reminder
- Connects to patient portal

ADMIN
- Collects e-signature
- Collects consent if needed

CLINICIAN
- Joins visit
- Provides virtual care
- Conducts visit
- Completes documentation
- Enters charges

PHYSICIAN
- Patient is checked out
- Patient receives post-visit survey

American Academy of Allergy, Asthma & Immunology

Virtual Practice Management Workshop
JULY 23-24, 2021

Virtual Practice Management Workshop
JULY 23-24, 2021
Workflow essentials

- Be clear on expectations from all employees

- **Make checklist:**
  - Front office ensures all office paperwork in chart- Forms/ID/Insurance card/consent
  - Front office collects co-pay/ co-insurance prior to visit***
  - Medical assistant/Nurse call for preliminary information- enter pharmacy, PMH
  - Physician/ APRN/ PA continue the visit
Assess and reassess

• Take a step back and review the workflow

• What is working?
• What needs to be changed?

Sample AM schedule

• 9:00  Telemedicine
• 9:30  In-office skin testing
• 10 AM Telemedicine
• 10:30 AM In-office
• 11 AM Telemedicine
• 11:30 In-office skin testing

• PM  In office
Alternate AM sample schedule

- 9 AM Oral challenge
- 10 AM Telemedicine
- 10:30 AM In- office
- 11 AM Telemedicine
- 11:30 in- Office

- PM Telemed

Utilizing office space

- Telehealth presents the unique opportunity to provide medical care without the need for more examination rooms

- Some practices may be able to add a practitioner for Telehealth without need for more office space
Promote your practice

• Use of social media to communicate with your patients

• Send emails to patients who have consented to email communication

Thinking outside the box

• Telemedicine use for supervision of oral challenge

• Telemedicine use for remote patient monitoring- asthma patients
Take Home Message

• Opportunities exist to provide medical care to patients in areas we normally would not be able to reach

• Take time to reassess how Telemedicine services are going—ask patients and staff

• Make changes as often as necessary
Wellness Strategies for the Practice Team
Theresa A. Bingemann, MD
Associate Professor of Pediatrics and Medicine
University of Rochester

Conflicts

- None
Outline

- How is your team doing?
- Identifying trigger points and stressors?
- How to manage/overcome the trigger points and stressors
- Team wellness strategies

Stress in the workplace

- 60% of Americans say their jobs are a source of stress
- Job stress > family responsibilities, personal health and economic concerns

Job stress ≠ Challenging work

Factors that impact job stress

- Office morale
- Style of management
- Job responsibilities
- Career concerns
- Traumatic events
- Work environment

Factors that impact job stress

- Workload
- Unrealistic events/demands
- Organizational change
- Job ambiguity
- Lack of recognition
- Poor relationships in the workplace

Ask, Ask, Ask (about trigger points/stressors)

- Meet with your team and reaffirm that trust and open communication with each other is the mutually desired goal. Have each member discuss what this means to them.
- Ask if there are any outstanding issues that need to be discussed. For example:
  - Do we have any unresolved concerns about communication between ourselves or management?
  - Do our duties or roles need clarifying?
  - Are resources to do our jobs lacking?
Listen, Listen, Listen

- What are they saying?
- What are they not saying?
- Ask clarifying questions

Creating the culture (of wellness)

- When a culture of wellness is present, leaders prioritize the personal and professional growth of its team members.
- Behaviors within the organization emphasize compassion for the self and others.
- Lead by example

Ann Allergy Asthma Immunol 126 (2021) 219e227
Managing trigger points/stressors

- Ask employees for possible solutions
- What would help you find professional fulfillment?
- What is most important to your employees?
- Use the principles of Appreciative Inquiry

Appreciative Inquiry

- DISCOVERY (The best of what is)
- DREAM (What could be)
- POSITIVE CORE (Affirmative topic of choice)
- DESIGN (Our ideal organization/office)
- DESTINY (What will we do?)
Evaluate your leadership style

- "Truly effective leaders are distinguished by a high degree of emotional intelligence, which includes self-awareness, self-regulation, motivation, empathy and social skill."
  - Daniel Goleman


TABLE 3. Leadership Qualities of Immediate Supervisors and the Prevalence of Burnout and Satisfaction in the Physicians They Supervise

<table>
<thead>
<tr>
<th>Leadership quality</th>
<th>Burnout (%) [95% CI]</th>
<th>Satisfaction (%) [95% CI]</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Prevalence of those rating leader favorably</td>
<td>Prevalence of those rating leader unfavorably</td>
</tr>
<tr>
<td>Holds career development conversations with me</td>
<td>36 (34.1-38.4)</td>
<td>51 (47.5-55.2)</td>
</tr>
<tr>
<td>Inspires me to do my best</td>
<td>36 (33.6-37.8)</td>
<td>52 (48.6-56.3)</td>
</tr>
<tr>
<td>Empowers me to do my job</td>
<td>35 (33-37.1)</td>
<td>56 (52.4-60.4)</td>
</tr>
<tr>
<td>Is interested in my opinion</td>
<td>36 (33.7-37.9)</td>
<td>54 (49.6-57.5)</td>
</tr>
<tr>
<td>Encourages employees to suggest ideas for improvement</td>
<td>37 (34.5-38.6)</td>
<td>52 (48-56.4)</td>
</tr>
<tr>
<td>Treats me with respect and dignity</td>
<td>38 (35.6-39.5)</td>
<td>56 (50.7-61.9)</td>
</tr>
<tr>
<td>Provides helpful feedback and coaching on my performance</td>
<td>35 (33.1-37.4)</td>
<td>50 (46.5-53.6)</td>
</tr>
<tr>
<td>Recognizes me for a job well done</td>
<td>36 (33.9-38)</td>
<td>53 (48.6-56.5)</td>
</tr>
<tr>
<td>Keeps me informed about changes taking place at Mayo Clinic</td>
<td>37 (34.5-38.6)</td>
<td>53 (49.7-57.7)</td>
</tr>
<tr>
<td>Encourages me to develop my talents and skills</td>
<td>35 (33.2-37.3)</td>
<td>54 (50.4-58)</td>
</tr>
<tr>
<td>I would recommend working for your immediate supervisor</td>
<td>36 (34.1-38.2)</td>
<td>53 (49.3-57.6)</td>
</tr>
<tr>
<td>Overall, how satisfied are you with your immediate supervisor</td>
<td>36 (34.8-38.1)</td>
<td>53 (49.5-57)</td>
</tr>
</tbody>
</table>
FIGURE 1. Relationships between mean composite leadership score of the immediate supervisor and physician emotional exhaustion (correlation coefficient=0.217; P<.001) (A), physician depersonalization (correlation coefficient=0.213; P<.001) (B), and physician satisfaction (correlation coefficient=0.504; P<.001) (C). Error bars indicate 95% CIs.

Figure 2. Personal resilience—basic principles.
Humor, Seriously

- Having a sense of humor
  - 23% more competent
  - 15% more satisfied with job
- Look for more reasons to laugh
- Try to create small moments of joy for someone else
  - Leave a nice note

Conclusions

- Ask your staff how things are going
- Listen attentively
- Implement changes where you can
- Be a model of wellness
- Assess your leadership style - where can you improve?
- Create an atmosphere where people enjoy coming to work
Further resources

- The New One Minute Manager
  - Ken Blanchard, PhD and Spencer Johnson, MD
- Help Them Grow or Watch Them Go: Career Conversations Employees Want
  - Beverly L. Kaye and Julie Winkie Giulioni
- Appreciative Inquiry in Healthcare –Positive Questions to Bring Out the Best
  - May, N. et al
  - Daniel Goleman
- The Rabbit Effect
  - Kelly Harding MD, MPH