Automating Ambulatory Open Encounters Reporting

Authors: Whitney Westphal, Jessica Street

Problem

- Closing ambulatory encounters is important because it impacts patient safety and regulatory compliance.
- For 5 years, HIM office manually created a weekly report of providers' outstanding open ambulatory encounters from a Cypress Report. The manual report was created in Excel and emailed out to ambulatory leaders and individual providers. This effort was cumbersome and time-consuming.

Goals

- Goal #1: replace old Open Encounters reporting with new Tableau report that automates open encounter notifications to individual providers and assorted ambulatory leaders
- Goal #2: reduce provider barriers to close open encounters through Tableau-Epic integration
- Measures of Success: Incomplete and Delinquent Medical Record policy compliance, report engagement, and time savings

Intervention Design

- Provider Report. Developed brand new provider-specific report. Providers only see their open encounters and compliance with the Incomplete and Delinquent Medical Record policy. This design is meant to protect provider privacy.
- Automated Messaging. Open Encounter status reports get sent directly from Tableau on Fridays.
- Reduced Barriers to Close Encounters. Links to Tableau report are available in Epic. When using Tableau in Epic, providers are able to directly click into a patient's chart from each open encounter reducing barriers to close open encounters.
- Timely Reporting. Tableau reports are updated daily so providers and leaders can see compliance in real-time.
- Encounter Reassignment. Replaced HIM manually managed list of reassigned encounters with automated process. Reassigned encounters will automatically fall off old provider's report.

Results

- Reduced Open Encounters. Since report launched on August 13, encounters have been closed at an average rate of 91%. That's a 3% improvement over FY21 and the highest compliance rate in past five years.
- Engagement. Provider report viewed 800+ times in first month of launching. This was also the second most-viewed ambulatory report in August 2021.
- Time Savings. Saves HIM 182 hours annually by eliminating manual reporting (17.5% of an administrative FTE). Time has been redirected to educate practice managers on how to reassign providers to encounters which will further improve the data quality in the report.
- Policy Compliance. New Open Encounters Reports provides Ambulatory leadership a tool to monitor compliance and carry out corrective action in accordance with Incomplete and Delinquent Medical Record Policy.

Conclusions & Next Steps

- Conclusions
  - New automated Open Encounters report provides more reliable data in real time.
  - User experience is enhanced through custom report views and email notifications.
  - Reduced barriers for providers to close open encounters which is already improving compliance.
- Next Steps
  - In early 2022, Reporting efforts will expand to include inpatient chart deficiencies. Providers will then receive a single notification for any incomplete records further improving efficiency and reducing manual HIM efforts.

Acknowledgements

- Dr. Stephen Weber, Dr. Ken Nunes, Pat McBride, Mary Kate Selling, Shwetha Devanagondi, Dr. Nishant Agrawal, Dr. Kelly Hynes, Dr. James Mitchell, Mark Connolly, Tim Filarski, Chrisi Mizera