The Proof is in the Data: Easy Recipes for Reliable Data Collection and Reporting

Scott Lloyd
President
scott.lloyd@mtmservices.org
www.mtmservices.org

Charlie Grantham
IT and Process Optimization Consultant
charlie.grantham@mtmservices.org
www.mtmservices.org

Booth: 462
Bedrock Change Principle….

“Value” of Care Equation

1. **Services provided** – Timely access to clinical and medical services, service array, duration and density of services through Level of Care/Benefit Design Criteria and/or EBPs that focuses on population based service needs

2. **Cost of services** provided based on current service delivery processes by CPT/HCPCS code and staff type

3. **Outcomes achieved** (i.e., how do we demonstrate that people are getting “better” such as with the DLA-20 Activities of Daily Living)

4. **Value is determined** based on can you achieve the same or better outcomes with a change of services delivered or change in service process costs which makes the outcomes under the new clinical model a better value for the payer.
Productivity is not a measure of how hard a staff member is working, but how well the system works for the staff.....

To Identify the Source of System Noise –
Anything that keeps staff from being able to do the job they want to do:
Helping consumers in need!

More Importantly, what do you do about it!?
Making Change Without a Data Driven Support System…..

Staff – “I’m busy/overwhelmed”
Leader – “No you’re not/I don’t think you are THAT busy.”

You – “Are consumers showing improvement?”
Staff – “They are doing great!”

Consultant – “So how are your no show rates?”
Team – “Much better than they used to be!”
Making Change Without a Data Driven Support System.....

- Team members with differing opinions, but neither side has data to back their points is a key roadblock to successful changes!
Busy

• Burdensome Paperwork Outside of Session
• Practice Variance (Over or Under Target)
• Service Density (Over or Under Target)
• High Level of No Shows/Follow Ups
• Overwhelmed with Meetings
• Excessive Travel Time

Billable

• Paperwork that is an appropriate length and works to engage the consumer
• Practice Variance and Services Density in line with treatment design.
• Engaged Consumers Who Show Up.
• Productive Meetings
• Travel Planned Out to Minimize Drive Time

“I Feel Overwhelmed...”
Why you need a Data Driven Support System…..

*A Data Driven Support System is* –

1. A system that utilizes data to help teams make informed decisions,
2. Identify organizational trends via the use of data (Examples – Client engagement, satisfaction, or outcomes)
3. Moves the team away from/past anecdotal conversations on what changes are needed.
Kitchen Basics: Boiling it down to the essentials

Too Many Chefs - Spoil the Broth
Kitchen Basics: Essential Data Elements –

• **Event:**
  – Something happened, and we recorded it.

• **When?**
  – What **day**? What **time**?

• **Where?**
  – Which **location**?
Essential Data Elements –

• Who was involved?
  – Staff Member?
  – Client / Patient?

• What Happened?
  – Service?
  – Appointment Status?
    • Show
    • No Show
    • Cancel
    • Staff Cancel
Essential Data Elements –

• What was the **Duration**?

• Who is going to pay?
  – Is it **billable**?
    • If so, what **CPT Code / Service Code** and how much do we bill, how much do we get paid?
    • If not, what **unbillable code** to we assign the time to.
  – Who is the **Payor**?
Essential Ingredients Overview

1. Event
2. Date/Time
3. Location
4. Staff
5. Client
6. Service
7. Appointment Status
8. Duration (Staff Time and Client Time)
9. CPT/Service Code (Billable or non-billable)
10. Payor
Before we start… Are we getting good ingredients?

• Are we auditing the **Data and the Data collectors** to make sure that we have good, clean data going into the system?
Auditing Data

EVENTS BY START HOUR

- 0:00: 23 events
- 1:00: 2 events
- 2:00: 1 event
- 3:00: 1 event
- 4:00: 15 events
- 5:00: 23 events
- 6:00: 40 events
- 7:00: 38 events
- 8:00: 22 events
- 9:00: 34 events
- 10:00: 31 events
- 11:00: 25 events
- 12:00: 18 events
- 13:00: 8 events
- 14:00: 3 events
Now Lets Get Cooking!
Now Let's Get Cooking!

Recipe One:
Make an appetizer out of Low Hanging Fruit

What are things we can make immediate impacts on?
Practice Variances at a glance.

VOLUME BY CPT

<table>
<thead>
<tr>
<th>Doctor</th>
<th>99212</th>
<th>99213</th>
<th>99214</th>
</tr>
</thead>
<tbody>
<tr>
<td>DR. HOOK</td>
<td>32</td>
<td>25</td>
<td>10</td>
</tr>
<tr>
<td>DR. OZ</td>
<td>45</td>
<td>22</td>
<td>2</td>
</tr>
<tr>
<td>DR. WHO</td>
<td>45</td>
<td>22</td>
<td>2</td>
</tr>
<tr>
<td>DR. ZHIVAGO</td>
<td>22</td>
<td>20</td>
<td>3</td>
</tr>
<tr>
<td>DR. PIERCE</td>
<td>60</td>
<td>30</td>
<td>15</td>
</tr>
<tr>
<td>DR. CRUSHER</td>
<td>65</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>DR. SHEPHERD</td>
<td>54</td>
<td>18</td>
<td>12</td>
</tr>
</tbody>
</table>
Use data to follow progress of changes

90791 - Intake

<table>
<thead>
<tr>
<th>Month</th>
<th>Client Time in Minutes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Jan</td>
<td>105.2</td>
</tr>
<tr>
<td>Feb</td>
<td>94.2</td>
</tr>
<tr>
<td>Mar</td>
<td>89.5</td>
</tr>
<tr>
<td>Apr</td>
<td>96.1</td>
</tr>
<tr>
<td>May</td>
<td>77.4</td>
</tr>
<tr>
<td>Jun</td>
<td>75.4</td>
</tr>
<tr>
<td>Jul</td>
<td>70.9</td>
</tr>
<tr>
<td>Aug</td>
<td>64.2</td>
</tr>
<tr>
<td>Sep</td>
<td>62.4</td>
</tr>
<tr>
<td>Oct</td>
<td>58.3</td>
</tr>
<tr>
<td>Nov</td>
<td>62.9</td>
</tr>
<tr>
<td>Dec</td>
<td>59.9</td>
</tr>
</tbody>
</table>
Recipe Two: Slicing and Dicing to see what is inside

Stratifying data adds flavor and texture.
Using Data to Drive Management

Practice Variance in Client Time

<table>
<thead>
<tr>
<th></th>
<th>Dr. Hook</th>
<th>Dr. Oz</th>
<th>Dr. Who</th>
<th>Dr. Zhivago</th>
<th>Dr. Pierce</th>
<th>Dr. Crusher</th>
<th>Dr. Shepherd</th>
</tr>
</thead>
<tbody>
<tr>
<td>Practice Variance</td>
<td>17.8</td>
<td>21.1</td>
<td>41.2</td>
<td>26.1</td>
<td>26.4</td>
<td>28.6</td>
<td>18.6</td>
</tr>
<tr>
<td>Practice Variance</td>
<td>46.4</td>
<td>30.1</td>
<td>46.4</td>
<td>39.4</td>
<td>30</td>
<td>25.7</td>
<td></td>
</tr>
<tr>
<td>Practice Variance</td>
<td>54.2</td>
<td></td>
<td>52.1</td>
<td>45</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Using Data to Drive Management
Additional Detail on Cancellation reason

Cancellation Detail - November

- Wilson Becker
- Heather Sanson
- Jade Kober
- Vivian Stanberry
- Keli Buttry

- Cancellation
- Late Cancellation
- Staff Cancellation
Now Let's Get Cooking!

Recipe Three:  
Time for the Entree’

Using Data to Manage your Practice, and to Drive Transformational Change.
# A Day in the Life

<table>
<thead>
<tr>
<th>Date</th>
<th>Start Time</th>
<th>Case #</th>
<th>Service</th>
<th>Appointment Status</th>
<th>Staff Time Minutes</th>
<th>Staff Time Hours</th>
<th>CPT</th>
</tr>
</thead>
<tbody>
<tr>
<td>11/1/2018</td>
<td>8:00:00</td>
<td>5873</td>
<td>Individual Treatment Session</td>
<td>Show</td>
<td>18</td>
<td>0.3</td>
<td>90832</td>
</tr>
<tr>
<td>8:30:00</td>
<td>6578</td>
<td>Individual Treatment Session</td>
<td>Show</td>
<td>33</td>
<td>0.55</td>
<td>90834</td>
<td></td>
</tr>
<tr>
<td>9:00:00</td>
<td>6494</td>
<td>Individual Treatment Session</td>
<td>No Show</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>9:30:00</td>
<td>10120</td>
<td>Individual Treatment Session</td>
<td>Show</td>
<td>21</td>
<td>0.35</td>
<td>90832</td>
<td></td>
</tr>
<tr>
<td>10:00:00</td>
<td>10638</td>
<td>Individual Treatment Session</td>
<td>Show</td>
<td>19</td>
<td>0.316667</td>
<td>90832</td>
<td></td>
</tr>
<tr>
<td>10:30:00</td>
<td>12484</td>
<td>Individual Treatment Session</td>
<td>Cancel</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>11:00:00</td>
<td>6614</td>
<td>Individual Treatment Session</td>
<td>Show</td>
<td>26</td>
<td>0.433333</td>
<td>90832</td>
<td></td>
</tr>
<tr>
<td>11:30:00</td>
<td>8452</td>
<td>Individual Treatment Session</td>
<td>Show</td>
<td>25</td>
<td>0.416667</td>
<td>90832</td>
<td></td>
</tr>
<tr>
<td>12:00:00</td>
<td>Lunch</td>
<td></td>
<td></td>
<td></td>
<td>30</td>
<td>0.5</td>
<td></td>
</tr>
<tr>
<td>12:30:00</td>
<td>Lunch</td>
<td></td>
<td></td>
<td></td>
<td>30</td>
<td>0.5</td>
<td></td>
</tr>
<tr>
<td>13:00:00</td>
<td>10593</td>
<td>Intake</td>
<td></td>
<td>Show</td>
<td>57</td>
<td>0.95</td>
<td>90791</td>
</tr>
</tbody>
</table>

**Graph:**
- **Cancel:** 8.62%
- **No Show:** 1.72%
- **Show:** 72.84%
- **Staff Cancel:** 77.59%

---

**Patsy Armstrong**

- Individual Treatment Session: 3.70%
- Patsy Armstrong: 72.84%
- Intake: 14.81%
- None: 12.07%
Trending No Show Data

No Show Percentage by Month

Jan  22%  Kept  8%  Cancel  12%  No Show
Feb  24%               11%                       12%
Mar  20%               11%                       12%
Apr  18%               11%                       12%
May  15%               11%                       12%
Jun  34%               12%                       12%
Jul  32%               10%                       12%
Aug  27%               5%                        12%
Sep  4%                   5%                         12%
Oct  4%                   5%                         12%
Nov  5%                   5%                         12%
Dec  5%                   5%                         12%

Kept  Cancel  No Show
Now Let's Get Cooking!

Recipe Four:  
A little Accounting to Cleanse the Pallet.

Financially centered reports can give focus to Administration and Clinical Staff alike.
Ingredients Overview

1. Event
2. Date/Time
3. Location
4. Staff
5. Client
6. Service
7. Appointment Status
8. Duration (Staff Time and Client Time)
9. CPT/Service Code (Billable or non-billable)
10. Payor
11. Net and Gross Revenue
Payor Mix

Aetna: 7%
BCBS: 4%
Medicaid: 41%
Medicare: 14%
Non Billable: 1%
Self Pay: 33%

- Aetna: $86,455.00
- BCBS: $50,100.00
- Medicaid: $520,250.00
- Medicare: $181,625.00
- Non Billable: $430,640.00
- Self Pay: $40,535.95

0 100000 200000 300000 400000 500000 600000

Aetna  BCBS  Medicaid  Medicare  Non Billable  Self Pay
Recipe Five: For Dessert, a focus on Outcomes

Tracking outcomes is the icing on the cake.
Ingredients Overview

1. Event
2. Date/Time
3. Location
4. Staff
5. Client
6. Service
7. Appointment Status
8. Duration  (Staff Time and Client Time)
9. CPT/Service Code  (Billable or non-billable)
10. Payor
11. Net and Gross Revenue
12. Outcome Scoring
Tracking Individual Client’s Progress

711542 - DLA SCORE
Outcome Tracking with a Twist of Revenue

DLA Delta Score / Net Revenue

$500.00
$400.00
$300.00
$200.00
$100.00
$0.00
($100.00)
($200.00)
($300.00)
($400.00)
($500.00)

-60 -50 -40 -30 -20 -10 0 10 20 30 40 50
We hope you like what we cooked up!
Questions?
Thank you for joining us!

Scott Lloyd
President
scott.lloyd@mtmservices.org
www.mtmservices.org

Charlie Grantham
IT and Process Optimization Consultant
charlie.grantham@mtmservices.org
www.mtmservices.org

Booth: 462