

MaineHealth

## MaineHealth Knowledge Connection

---

MaineHealth Maine Medical Center

All MaineHealth

---

10-4-2019

### Joint Annual Wellness Visit Scheduling

Rob Chamberlin  
*Maine Medical Center*

Jennifer Bliss  
*Maine Medical Center*

Andrea Lai  
*Maine Medical Center*

Paula Dougherty  
*Maine Medical Center*

Deb Swett  
*Maine Medical Center*

*See next page for additional authors*

Follow this and additional works at: <https://knowledgeconnection.mainehealth.org/mmc>



Part of the [Health and Medical Administration Commons](#), [Pharmacoeconomics and Pharmaceutical Economics Commons](#), and the [Primary Care Commons](#)

---

#### Recommended Citation

Chamberlin, Rob; Bliss, Jennifer; Lai, Andrea; Dougherty, Paula; Swett, Deb; Merrithew, Logan; Stevens, Pam; and Williams, Scott, "Joint Annual Wellness Visit Scheduling" (2019). *MaineHealth Maine Medical Center*. 720.

<https://knowledgeconnection.mainehealth.org/mmc/720>

This A3 is brought to you for free and open access by the All MaineHealth at MaineHealth Knowledge Connection. It has been accepted for inclusion in MaineHealth Maine Medical Center by an authorized administrator of MaineHealth Knowledge Connection.

---

## Authors

Rob Chamberlin, Jennifer Bliss, Andrea Lai, Paula Dougherty, Deb Swett, Logan Merrithew, Pam Stevens, and Scott Williams

Project: Joint Annual Wellness Visit Scheduling  
Last Updated: October 4, 2018

Executive Sponsor: Rob Chamberlin, MD  
Facilitator: Jennifer Bliss

Team Members: Andrea Lai PharmD, Paula Dougherty, Jennifer Bliss  
Resource Members: Deb Swett, Logan Merrithew, Pam Stevens, Dr. Scott Williams

Problem/Impact Statement:

The pharmacists in Scarborough & Westbrook Primary Care conduct Medicare Annual Wellness Visits (AWVs) with a physician. The pharmacist and physician see the patient individually. The practices achieved and sustained FY18 Joint AWV volume goals through a new process to reschedule physician-only AWVs to Joints AWVs with a pharmacist. This leads to reschedule rework and reduced time practice staff have for patient care.

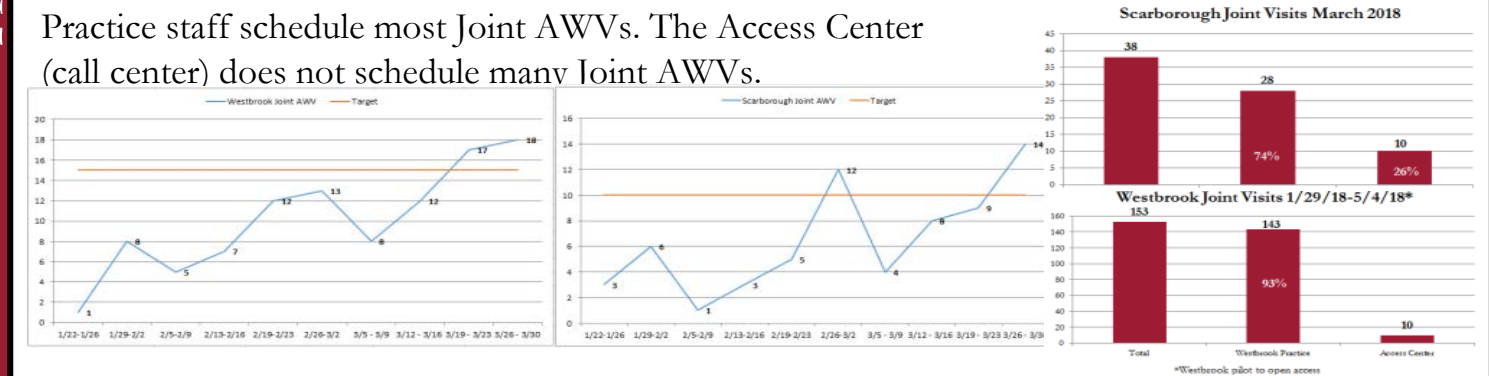
Scope:

Includes: The FY18 volume of scheduled AWVs and Joint Annual Wellness Visits in MMP Scarborough and Westbrook Primary Care. Partnering Departments include the Access Center, Pharmacists, Scheduler and Data Analysts.  
Excludes: AWV Patient Packets and Materials and System Level AWV Planning.

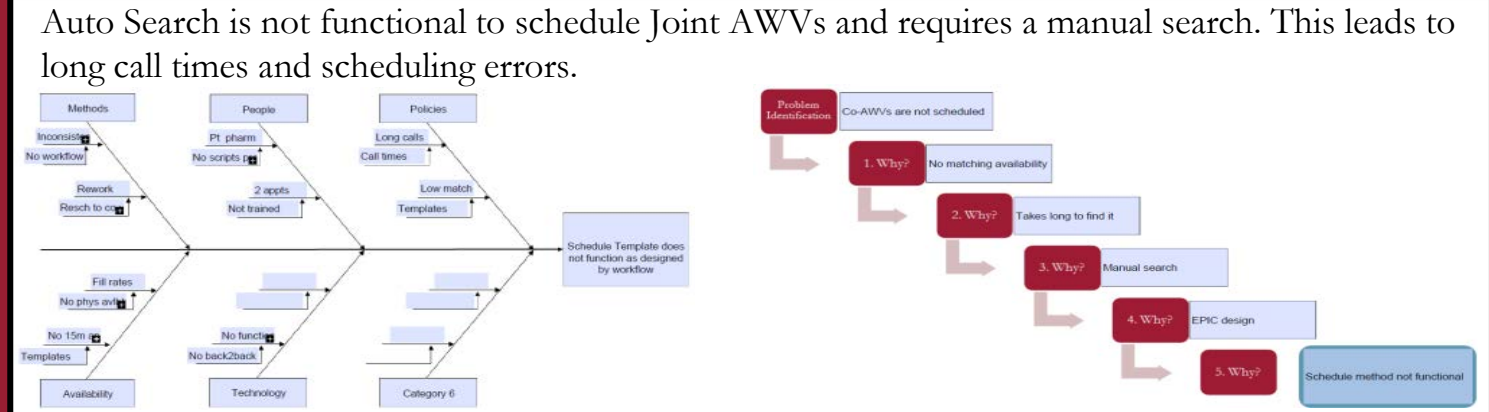
Goal/Objective:

Sustain FY18 Joint AWV volume goals in Scarborough & Westbrook Primary Care with 0% reschedules from a physician-only AWV to a Joint AWV that includes a pharmacist to improve patient access and quality of care.

Baseline Metrics/Current State:



Root Cause Analysis:



Countermeasures

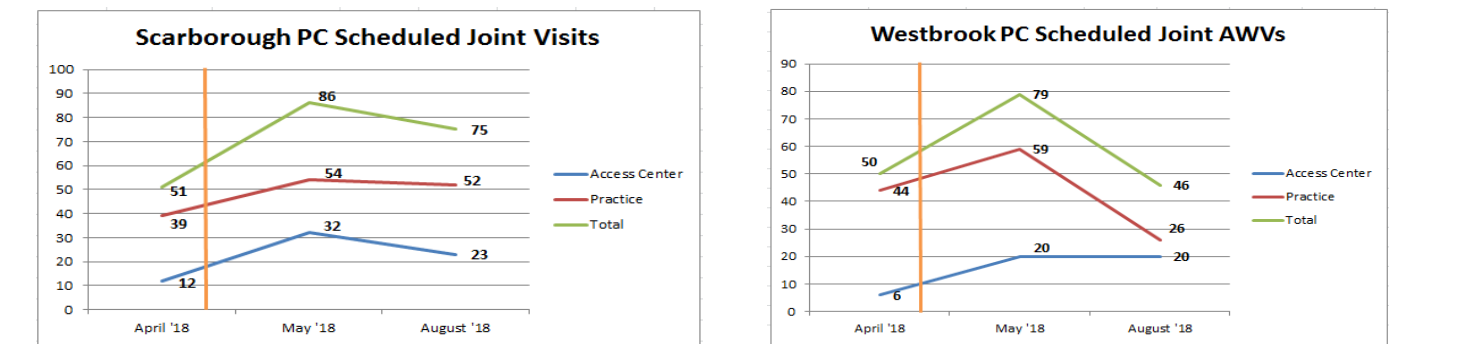
Joint AWV scheduling scripting and training were deployed. IS was asked to determine if auto search is an available function.

Root Cause/Problem	Action Plan Item	Who	By When
Messaging co-AWV optional	Access Center to use new scripting	Jennifer Bliss	4/13/2018
Back-to-back appointment scheduling with 2 providers is not functional via auto search in EPIC	Discuss EPIC function with IS SWAT team visiting Westbrook	Paula Dougherty	4/18/18 Postponed to 5/8/18
Co-AWVs booked as 2 separate encounters instead of 1	Julie Lernihan, PharmD to resolve with Deb Swett, Access Center Director	Julie Lernihan, PharmD	5/10/18

Item or Process Step	Potential Failure Mode	Potential Effect(s) of Failure	S E V	Potential Cause(s)	O C C	Current Controls	D E T	R P N	Recommended Action	Responsible
Patient calls Access Center for AWV	Co-AWV not scheduled	Do not meet pro forma target	8	Patient is given a choice not to meet with pharmacist	8	Minimal	3	192	Provide scripting to Access Center	Jennifer Bliss
Access Center schedules AWV instead of co-AWV	Practice will reschedule to a co-AWV	No matching availability with pharm and phys	10	No matching availability with pharm and phys	3	Minimal	3	90	Monitor	Pharmacist Expansion Workgroup
Access Center schedules AWV instead of co-AWV	Co-AWVs volume targets are not met	Practice will reschedule existing	6	Manual instead of automated search process	8	Manual check	3	144	Ask IS about EPIC search function to schedule back-to-back meetings with patient	Paula Dougherty
Practice checks AWV volume	Non-patient work for staff	Staff re-work	7	Appointment not scheduled as co-AWV	8	Manual check	3	168	Ask IS about EPIC search function to schedule back-to-back meetings with patient	Paula Dougherty
Practice manually searches for matching appointments	Patient re-called	Rework for patient and staff	8	Access Center cannot schedule co-AWV	8	Manual check	3	192	Ask IS about EPIC search function to schedule back-to-back meetings with patient	Paula Dougherty

Outcomes

Joint AWVs scheduled by the Access Center increased from April-May 2018. In June 2018 an AWV outreach paused and patient calls for AWVs declined. Simultaneously, pharmacists' independent volume positively increased and availability for Joint AWVs appropriately decreased. These combined factors led to fewer reschedules of Joint AWVs by the practices.



Next Steps

Response pending on request to determine if auto search is a functional option.  
A workgroup will monitor and analyze the impact of a new schedule template at Westbrook Primary Care.  
Continue to monitor Joint AWV volume and the number of appointments scheduled by practices and Access Center and develop response plans accordingly.