

**HCCI**  
HOME CENTERED CARE  
INSTITUTE

**Geographic Scheduling: Impact on Home-Based Primary Care Productivity**

Brianna Plencner CPC, CPMA; Paul Chiang, MD; Thomas Cornwell, MD

HCCIntelligence™ Webinar and Virtual Office Hours  
September 18, 2019

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**Introductions**



**Thomas Cornwell, MD**  
CEO, Home Centered Care Institute  
Founder, Northwestern Medicine HomeCare Physicians



**Paul Chiang, MD**  
Senior Medical & Practice Advisor, Home Centered Care Institute  
Medical Director, Northwestern Medicine HomeCare Physicians



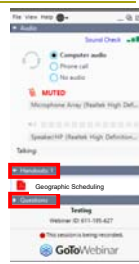

**Brianna Plencner, CPC, CPMA**  
Manager, Practice Improvement, Home Centered Care Institute



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**Housekeeping**

- The first 30 minutes of today's HCCIntelligence™ Webinar will consist of a slide presentation and all participants will be muted during this time.
- The following 30 minutes will be HCCIntelligence™ Virtual Office Hours, and all participants will be able to submit questions via the question box.
- To submit a question, click on the arrow next to Questions, type in your question, press send.
- Handouts can be accessed in the handout box.
  - Click on the name of the file and save to your computer
- All participants will receive a copy of the slide deck, question and responses, and a recording of the HCCIntelligence™ Webinar & Virtual Office Hours.

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**HCCI**  
HOME CENTERED CARE  
INSTITUTE

Advancing home-based primary care to ensure medically complex patients have access to high-quality care in their home.

EDUCATION | CONSULTING | RESEARCH | ADVOCACY

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**Objectives**



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**Objectives**

- 1 Discuss the impact of geographic scheduling and route planning.
- 2 Describe tools and resources to assist with planning and routing.
- 3 Identify ways to operationalize the process of geographic scheduling.



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# Geographic Scheduling



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## Why is it important?

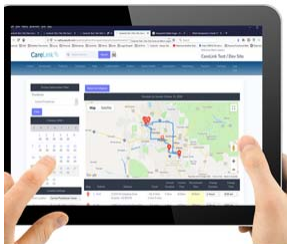

- Minimizes travel time
- Necessary in order to meet productivity goals
- Thoughtful approach to maintain reasonable workflows
- Helps you identify your most populated service areas
- Critical to success of the practice and provider satisfaction



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## Geographic Scheduling Considerations

- Define provider territory zones across your team within proximity
- Develop a scheduling guide for each provider to assist with grouping future appointments
- Designate task responsibility and define your documented process
- Maintain patient lists from your facilities (ALF's, Group Homes, SNF's)
- Monitor and review effectiveness


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## Technology Resources




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## CareLink Mobile Practice Manager




[mymobilepracticemanager.com](http://mymobilepracticemanager.com)

- HIPAA Compliant
- Map based patient scheduling and driving optimization tools
- Electronic order and signature capability
- Visit frequency customization per patient
- Reporting capability such as referrals and mileage
- Bulk scheduling to group nearby patients
- Ability to create reoccurring schedules
- Facility portal to enhance communication
- Overdue patient reports to prevent care gaps
- Scheduling only \$299/month for up to 2-5 providers




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## Road Warrior




[roadwarriorapp.com](http://roadwarriorapp.com)

- Route Optimization Tool
- Free APP can be downloaded on smart phones and used for free for up to 8 addresses
- Customize routes based on start and end locations
- Route summary includes travel time and mileage
- Road Warrior Basic is free or Road Warrior Pro \$5/month or \$50/year




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## Maptive




[maptive.com](http://maptive.com)

- Creates custom Google Maps
- Location based data
- Map created based on spreadsheet data
- Draw a radius map
- Color markers by category
- Route optimization with directions
- 45 day pass is \$250 or 1 user is \$1,250/year




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## MULTIPLOTTR



[multiplottr.com](http://multiplottr.com)

- Create and save customized maps
- Mark patient locations numerically
- Group patients in zip codes using color codes
- Bulk upload multiple addresses
- \$20/month or \$57 every three months



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## Bing or Google Maps



[bing.com/maps](http://bing.com/maps)




[maps.google.com](http://maps.google.com)

- Add and save addresses to display geographic locations
- Can be used for daily route planning to optimize driving route per provider
- Will limit how many addresses can be added at one time
- Free online resources



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## Route Planning



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## Route Planning

- **Account for start and end locations**
- **It's recommended to provide a time window for appointment times:**
  - 2 hour time frame window for each patient (e.g. 9:00 am - 11:00 am)
  - Provide AM or PM time frames (e.g. 9:00 am - 12:00 pm or 1:00 pm - 4:00 pm)
- **Consider travel time between visits**
- **Build in time for lunch or breaks as needed**
- **Make time to address messages throughout your day**



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## Scheduling Guides



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## Scheduling Considerations

- Designate staff to review future schedules and regroup appointments as necessary
- Provide patients an approximate follow up appointment date, such as 2 months
- Practice staff can wait until 1 week - 2 days prior to notify and confirm visit date and time with the patient and/or caregiver
- Consider how you will accommodate acute or urgent visits
- Meet with provider staff, operations and leadership teams to understand each others needs
- Set productivity standards
- Allow for flexibility
- No show policy




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## Example Scheduling Guide

Provider	Day of the week	Service Areas
Dr. Smith	Monday & Wednesday	Wheaton, Carol Stream
Sally Sue, APN	Friday	Bloomington, Hanover Park, Bartlett
Jane Adams, PA	Tuesday, Thursday	60190, 60008, 60067, 60038
Dr. Luck	Tuesday	Designated X Facility Day


Refer to HCCI Sample Scheduling Guide for additional details



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## HCCIntelligence™ Virtual Office Hours: Ask the Experts


*An open forum for questions and answers*




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## HCCI Education and Resources

-  **Gerontological Advanced Practice Nurses Association (GAPNA): Preconference**  
*House Calls: APNs Navigating Challenges and Implementing Solutions*  
October 2, 2019 in Las Vegas, NV
-  **American Academy of Home Care Medicine (AAHCM): Preconference**  
*House Calls: Achieving Clinical Excellence and Sustainability*  
October 17, 2019 in Chicago, IL
-  **HCCI Advanced Applications of Home-Based Primary Care™ Workshop**  
December 5-6, 2019 in Schaumburg, IL
-  **HCCI University Online Courses**  
Featuring 12 on-demand web-based courses in both clinical and practice management topics. Available 24/7 at [www.HCCIInstitute.org](http://www.HCCIInstitute.org)




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### HCCIntelligence™ Resource Center


At HCCI, we recognize the numerous challenges that can be encountered by home-based primary care (HBPC) providers and practice staff and the value of having access to knowledgeable experts and timely guidance. HCCI has developed a number of free resources to help you and your practice under our HCCIntelligence™ Resource Center at <http://www.hccinstitute.org>.



**Hotline**  
630.283.9222 or email [Help@HCCIInstitute.org](mailto:Help@HCCIInstitute.org)  
9:00 am – 5:00 pm (CST)  
Monday through Friday




**Webinars**  
Every third Wednesday of the month, HCCI hosts a free webinar on a clinical or practice management topic relevant to home-based primary care (HBPC).



**Virtual Office Hours**  
Immediately following the monthly HCCIntelligence™ Webinar, HCCI hosts a 30-Minute Virtual Office Hours Session.

Visit the [HCCIntelligence™ Resource Center](http://www.hccinstitute.org)



\*HCCIntelligence™ is for educational and informational purposes only and should not be relied upon as medical advice.

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## Upcoming HCCIntelligence™ Webinars and Virtual Office Hours

### Thursday, October 17<sup>th</sup> 4 pm – 5 pm CST

Loews Chicago O'Hare Hotel  
Louvre Ballroom  
Rosemont, Illinois

Join us for HCCIntelligence™ – Live Office Hours to be held at the **American Academy of Home Care Medicine (AAHCM): Preconference** presented by Home Centered Care Institute (HCCI).



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### Upcoming HCCIntelligence™ Webinars and Virtual Office Hours


**Wednesday, November 20<sup>th</sup> 4 pm – 5 pm CST**  
*Entrepreneurship: "I Want to Start a House Call Program!"*

**Objectives**

- Describe the type of individual it takes to own your own practice.
- Discuss the rewards and challenges faced in starting up a new practice and operating your own business.
- Identify key elements in achieving success and sustainability.
- Define pitfalls and how to avoid them.

**Presenters**

- Sandra L. Berkowitz, RN, JD  
National Nurse Practitioner Entrepreneur Network (NNPEN)
- Lynn Rapsilber, DNP, ANP  
National Nurse Practitioner Entrepreneur Network (NNPEN)



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### Upcoming HCCIntelligence™ Webinars and Virtual Office Hours


**Wednesday, December 19<sup>th</sup> 4 pm – 5 pm CST**  
*Managing Depressive Disorders in Homebound Patients*

**Objectives**


- Describe the varied presentations and assessment approach for different types of depressive disorders in complex, frail, elderly patients in the home setting.
- Explore effective strategies for the treatment of depression in homebound patients.
- Provide timely guidance to caregivers of homebound patients with depressive disorders.

**Presenters**

- James M. Ellison, MD, MPH, Christiana Care



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### HCCI Consulting Services

**Helping Organizations Build Sustainable Home-Based Primary Care Programs**

At Home Centered Care Institute, we are committed to transforming health care through sustainable, innovative house call programs that enhance the patient experience, improve health outcomes, and reduce costs.

HCCI is pleased to offer affordable consulting services tailored to meet your practice's specific needs.

**Our consultants include:**

- Providers** with extensive experience in HBPC.
- Practice managers** skilled in running house call programs and recognized with national certifications in coding and medical auditing.
- Other professionals** with expertise in strategic planning, marketing, education and training, and quality.

To connect with HCCI and discover how your current or future practice can benefit from working with our team of professionals and expert consultants call 630.283.9222 or email [help@HCCInstitute.org](mailto:help@HCCInstitute.org).



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