

Managing Patient Throughput



Center for Deployment Psychology



Disclaimer

The views expressed are those of the presenter and do not necessarily reflect the opinions of the Uniformed Services University of the Health Sciences, the Department of Defense, or the U.S. Government.





Clinic Optimization Toolkit

Modules

Clinic Gap Analysis

Patient Management

EBP Utilization

Group Therapy
Expansion

Technician Support

Metrics

Evaluation

Types of Resources



Training Decks



Fact Sheets & Handouts



Forms & Templates



Spreadsheets & Supporting Documents



Standard Operating Procedures







Learning Objectives

 Distinguish different factors affecting patient throughput in clinics

 Analyze strategies for addressing influx of patients, managing ongoing cases, and closing cases within a clinic





OVERVIEW OF PATIENT THROUGHPUT





What is Patient Throughput?

Influx of New Cases

How Cases are Managed

Closing Cases





Why Regulate Patient Flow?



Increase Quality of Care

Improve Patient Satisfaction

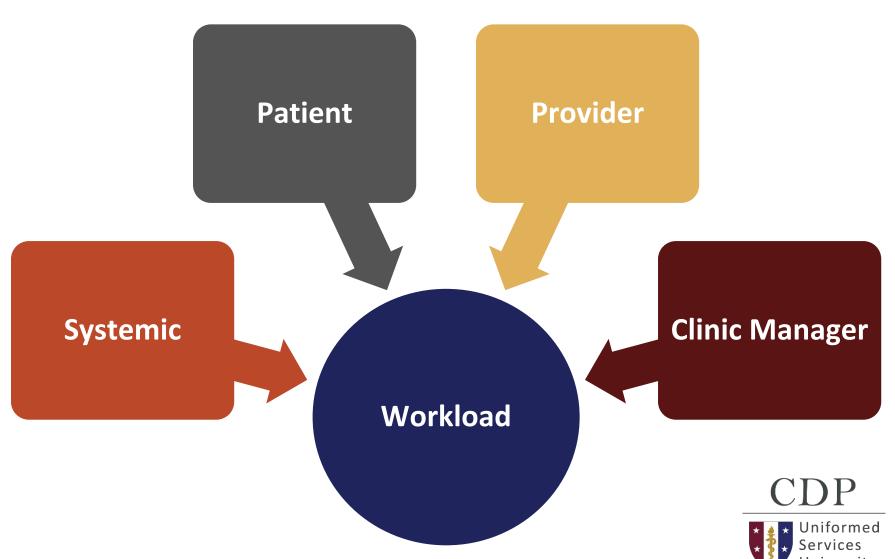
Reduce Provider Burnout

Improve Clinic Functioning



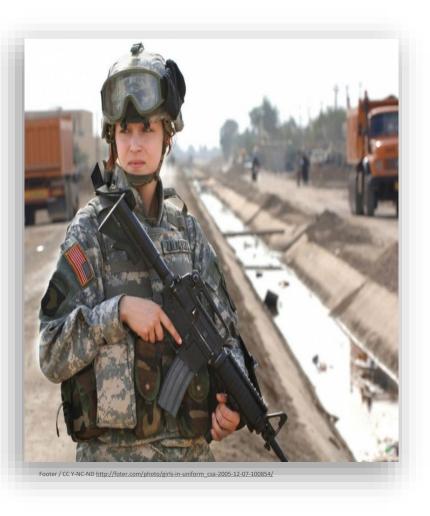


Factors Affecting MHS Workload





Systemic Variables





More Exposure to Combat



Greater Survivability



De-Stigmatization of Treatment





Patient Variables





Expect Individual Therapy

Misperceptions about Treatment



355th Medical Group Mental Health clinic personnel discuss routine tasks at Davis-Monthan Air Force Base, Arizona, Nov. 27, 2019.



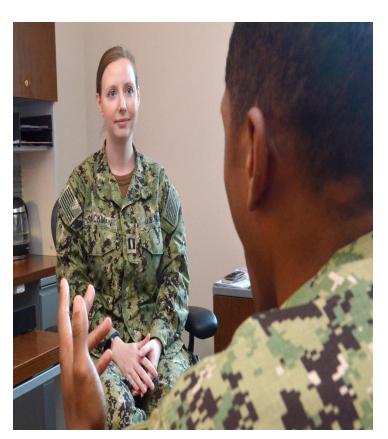


Provider Variables

Lack of EBP Training

Fear of Patient Complaints

Incentive to Keep Subclinical Patients



(August 23, 2019. U.S. Navy photo by Jacob Sippel, Naval Hospital Jacksonville/Released)





Clinic Manager Variables



Hesitancy to Triage Incoming Patients

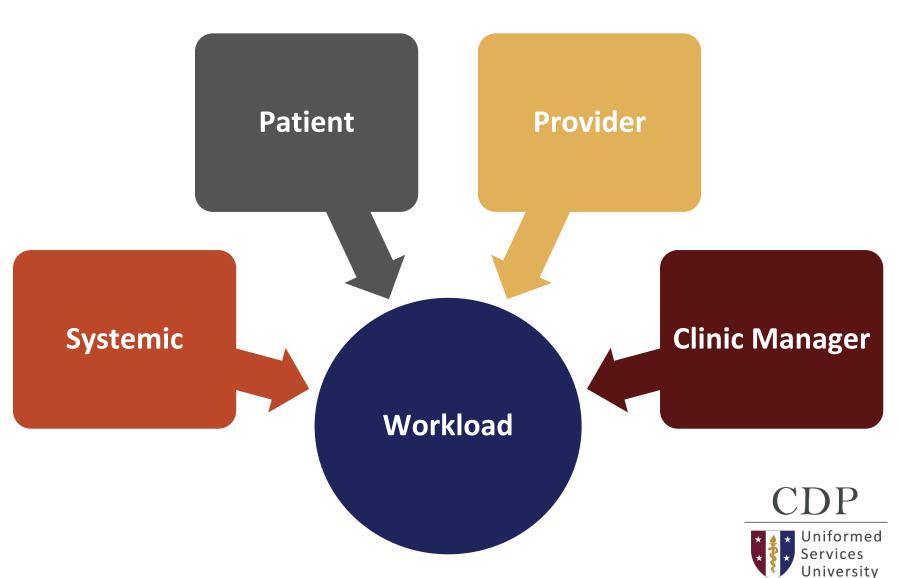
Lack Tools to Analyze
Provider Panels

Providers Avoid
Complicated Cases





Summary of Variables





Step 1: Managing Influx

Influx of New Cases

How Cases are Managed

Closing Cases





Referral Sources for Patients

Primary Care

BH in Primary Care

Self-referral

Embedded Providers

Leadership

MFLC

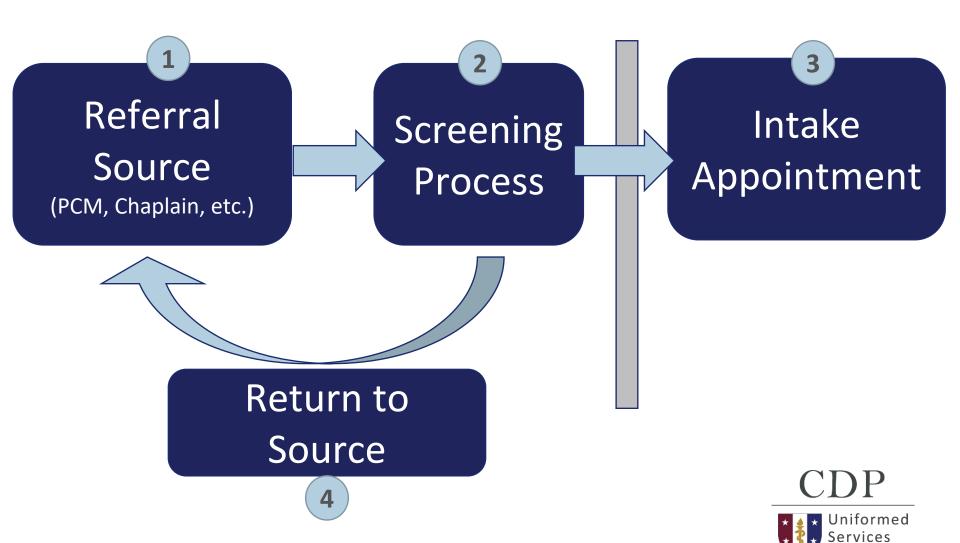
Chaplains

Community Services





Referral Screening Process





Barriers to Screening Referrals

Time

Complaints

RVUs





Implement a Screening Process

Inform Chain of Command

Consult with Referral Sources

Required Information

Triage Process

Expectations for Treatment





Delegate Screening to BHTs



Assign/Train BHTs

Match Patients to EBPs Providers

 $U.S.\ Army\ photo\ by\ SGT\ Christopher\ Calvert.$ http://www.dvidshub.net/image/1006077/air-cavalry-mental-health-specialist-helps-troops-combats-stigmannly-mental-health-specialist-hea





Utilize Other Treatment Options



Primary Care

BH in Primary Care

Community Services

Chaplains

Military One Source





Referral Screening Exceptions

Training Sites

Provider Specialties

Network Recapture

Military Evaluations





Step 2: Managing Cases

Influx of New Cases

How Cases are Managed

Closing Cases





Benefits of EBPs



Lessen Patient Symptoms



Reduce Appointments



Improve Provider Satisfaction





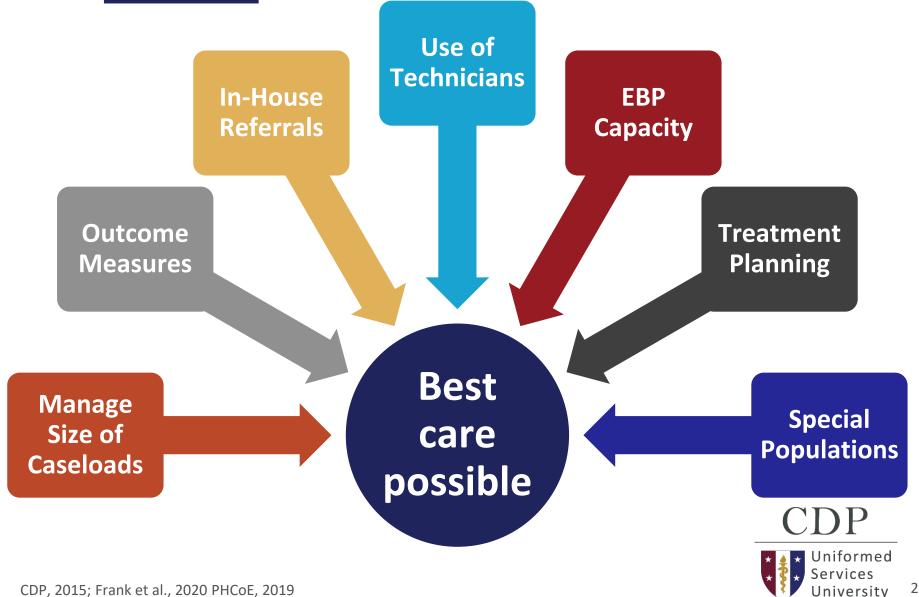
Assignment of New Cases







Setting the Stage for Success





Managing Caseloads



Reduced Access to Quality Care

Increased Levels of Provider Burnout





<u>Use of Outcome Measures</u>

DoD Requirements

Treatment Planning

Identifying Sub-clinical Patients

Process Improvement







Within-Clinic Referral Process







Individual Therapy Referrals

Option 1: Next Available with EBP Provider



Option 2: EBP
Provider Briefed
& Accepts Case

Option 3: EBP Sub-clinic





Group Therapy Referrals



Option 1: Next Available Group

Option 2:
Screened by EBP
Provider or BHT
Before
Enrollment





Use of Technicians

Outcome Measures

Group Coordination

Patient Screenings



Photo by Christopher W. Cudney [Public domain], via Wikimedia Commons





EBP Capacity



Lack of Trained EBP Providers

Providers not
Comfortable Providing
EBPs

Lack of Time for Consultation





Treatment Planning

Align Services to Patient Need

Objectively Examine a Case







Challenges to Case Reviews



Lack of Time

Deciding which Cases to Review

Obtaining Patient Input





20/20 Review Process

Set Time

Build a Team

Select Cases

Complete Review Form

Get Patient Input (optional)

The 2	20/20	Trea	tme	nt Te	am	Revie	:W:
	Han	dout	for	Clinic	Sta	ff	

The 20/20 review is a chance for the treatment team to take a closer look at care delivered for cases within the clinic. The frequency of this review is every twenty sessions. It involves a thorough review of cases by a team of fellow providers using a structured approach focused on assessing effectiveness of care. The review allows an opportunity to problem-solve barriers to treatment progress using a team approach.

Provider completes this section before the treatment team meeting:

Diagnoses:	
Admin status (Pending	
Profile/MEB/ ADSEP?):	
# of sessions/months of BH	
care prior to this clinic	
(prior duty stations):	
# of sessions to date	
(within this clinic):	
# of sessions with current	
provider:	
Formal outcome measures	
being used:	
Group attendance history:	
Current treatment goals:	
# of additional sessions anticipated to treat the patient:	
Modalities used	Individual therapy: Y/N; Type: supportive counseling or EBP; Freq:/
(Circle all that are being	Group therapy: Y/N; Type: process/interpersonal or EBP; Freq: /
used with this patient;	Group therapy: Y/N; Type: process/interpersonal or EBP; Freq:/ Medications: Y/N; Type:; Freq:/
indicate frequency of	Biofeedback: Y/N Freq:/
appointments per week	Other:
or per month):	
p,	





20/20 Review Meetings

Provider Presents Case

Team Updates Treatment Plan

BHT Tracks Taskings

Treatment Plan Update

As part of your care plan, we have discussed the need to attend therapy sessions on a regular basis and how missing appointments limits the progress that can be made in therapy. The original treatment plan involved weekly individual therapy sessions for a number of weekly however, due to various reasons, it has not been possible for you to attend at regular intervals.

We have discussed the obstacles to attending therapy sessions and tried to problem-solve ways to get around these obstacles. It is my sincere hope that you can work around these obstacles and find time in your schedule to attend therapy on a regular basis.

As your provider, I have recommended the following course of action for moving ahead.

2) Patient will enroll in and complete all sessions of an EBP group, including homework assignments from this group. Based on discussion with the patient, the following group was selected: _____. The patient will reach out to the clinic to book an appointment with the provider after completing the course of group therapy.

____3) Patient will join one of the clinic's interpersonal therapy groups for regular follow-up.

After looking at availability, the group on ____ run by ____ was selected.

After several sessions of group, patient will reach out to the clinic to book an individual follow-up appointment if needed.

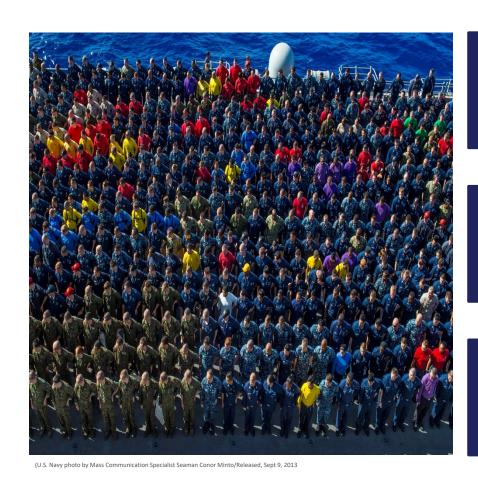
I understand the rationale for this change in	Patient Signature:
my treatment plan, and I have had a chance	
to ask questions regarding the change.	

-





Special Populations



Sub-clinical

Under Engaged

Seeking Administrative
Outcome





SUBCLINICAL PATIENTS





<u>Definition</u>



Fear Complaints

Good Patients

Uncomfortable with Termination





<u>Identification</u>

Number of Cases

Complexity

Outcome Data







Ft. Somewhere





High Utilizers

	А	В	С		
1	Ft. Somewhere (High utilizer list)				
2					
3	Patient ID	# of encounters	Bencat		
4	123456789	123	Active duty		
5	123456790	110	Active duty		
6	123456791	98	Retiree		
7	123456792	96	Active duty		
8	123456793	90	Active duty		
9	123456794	88	Active duty		
10	123456795	79	Active duty		
11	123456796	76	Active duty		
12	123456797	75	Active duty		
13	123456798	71	Active duty		
14	123456799	67	Active duty		
15	123456800	66	Retiree		





SPC Smith



ID as High Utilizer

Mostly Follow-up Appts

Dx with Anxiety NOS

Outcome Measures Subclinical Range



(U.S. Army National Guard photo by Spc. Michael Schwenk March 19, 2021)



Management



End Therapy



Process Group



Alternate Schedule





<u>Prevention</u>

Policies & Guidelines

Expectations

Treatment Plan

Chart Review

EBP Groups









UNDER ENGAGING PATIENT





Definition



Poor Attendance

Lack of Homework
Compliance

Unprepared to Change





CPT Gonzales

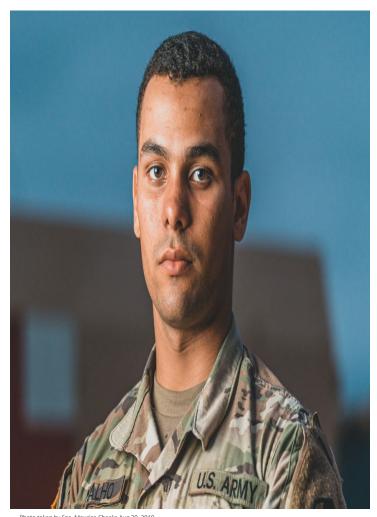


Photo taken by Spc. Maurice Cheeks Aug 20, 2019

ID as High Utilizer

Poor Homework Compliance

Shows up Late for Appts, Frequently Reschedules

PCLs in Clinical Range





Management



Require Homework

Process Group

End Therapy





Provider Reluctance to End Therapy

Work as a Team

Share Complicated and Risky Cases

Plan to Address Provider
Discomfort



(U.S. Air Force photo by Airman 1st Class Melody Bordeaux, Nov 24, 2020)





Clinic Manager Role



Discuss Cases

Encourage Professional Development

Create Natural Contingencies

Manage Provider Templates





PATIENTS SEEKING ADMINISTRATIVE OUTCOMES





Definition







<u>Identification</u>

- Therapeutic Change
- Administrative Outcome





Administrative Outcomes

Discharge from Service

Change in Duty Status

Change in Duty Station

REPORT OF N	MENTAL STATUS EVALUATION	
	e, AR 40-66; the proponent agency is OTSG.	
SECTION	I - REASON FOR EVALUATION	
Sef-Referal	Advanced Training Application	
Command-Directed Behavioral Health Evaluation	Clearance for Admin Sep under A	VR 635-200, Chapter
Hospital Discharge	MMRB/MEB	
Other		
	ON II - FITNESS FOR DUTY	
FROM A BEHAVIORAL HEALTH STANDPOINT, THE ABOVE S		
Fit for full duty, including deployment.		
Possibly non-deployable due to prescribed medications. Comm	mand surgeon waiver is is not recommend	ded.
Requires temporary duty limitations and will likely require beh	rayloral health treatment to be restored to full duty.	
Unfit for duty due to a personality disorder or other mental co		у.
Unfit for duty due to a serious mental condition that is not like	ly to resolve within 1 year.	
Further assessment is needed to determine fitness for duty.		
SECTION III - PERTINENT	FINDINGS ON MENTAL STATUS EXAMINATION	N
COGNITION: No obvious impairments Midly impaired	Moderately impaired Severely impaired	
BEHAVIOR: Cooperative Uncooperative Manipulative	we Hostile Suspicious Bizarre	
PERCEPTIONS: Normal Hallucinations Delusions	Obsessions	
MPULSNITY: Unlikely to be impulsive Occasionally in	rpulsive Frequently impulsive	
DANGEROUSNESS: None Suicidal Thoughts Ho	omicidal Thoughts Suicidal Intent Homic	idal Intent
OTHER		
SEC	TION IV - IMPRESSIONS	
N MY OPINION, THIS SERVICE MEMBER:		
Can understand and participate in administrative proceedings		
Can appreciate the difference between right and wrong. Meets medical retention requirements (i.e., does not qualify the second	to a Madred East office Board	
Requires further examination or testing to finalize diagnosis a		
Other:		
RECTION V - DIAGNOSES (ONLY	THOSE REQUIRED FOR ADMINISTRATIVE PRO	VOER REMOT
AXIS I (psychiatric conditions):	THOSE REGULED FOR ADMINISTRATIVE PAG	ALEGORIA)
VIS II (personality & intelligence disorders):		
AXIS III (medical conditions):		
PA	ATTENT INFORMATION	
Patient Name:	Rank/Grade:	Stetus:
	Sportsor SSN: MTF Code:	Dete:
ATTENT'S IDENTIFICATION (For typed or written entries, give:	Name - last, first, middle; grade; date; hospital or	medical feolity)





Assessing Patient Motivation

	Name:				
		D	06:		
Treatment Expectation	and Belie	fs Scale			
NSTRUCTIONS: This brief form will help us before undentund you and your expectations about getting treatment. For each item, p section 1:					uning
Please indicate the strength to which you disagree or agree with the following statements:	Strongly Disagree	Disagree	Unsuee	Agree	Strongly
Lam tired of having these symptoms and/or problems.					
My symptoms are making my life much harder than it should be.					
 My symptoms have been causing problems in my personal blo. 					
 My symptoms have been causing problems at work. 					
I am open to trying a "talk therapy."					
I am willing to try therapies that require homework.					
I am willing to consider a group therapy.					
I am open to trying a medication.					
 I think treatment will help me. 					
 My problems are too big to be solved. 					
 Getting treatment is the best thing for me now. 					
Ifeel pressured by others to come in for treatment.					
 I may be too busy to actually come in regularly for treatment at this time. 					
 I am worried that getting treatment may affect my career. 					

Non-active duty patients may stop here.

Active Duty and activated National Guard and Reserve Service members should complete Section 2 on the next page.





SSG Johnson



ID as High Utilizer

Lack of Improvement & Poor Treatment Compliance

High PHQ9 Scores

Wants Medical Separation





Discussing Administrative Outcomes

Reasons for Seeking
Treatment

Openness to Therapy

Alternatives to Therapy if Appropriate







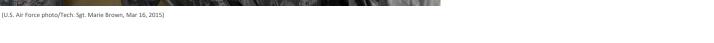
Patient Management



Clarify Goals

Encourage Clinical improvement

Pursue
Administrative Action







Management

Track Administrative Outcomes

Enroll in Process Group

Psychoeducational Groups





Step 3: Closing Cases

Influx of New Cases

How Cases are Managed

Closing Cases





Exiting the System



Successful Remission

Drop-out

Administrative Separation





Management Effects on Pt Dispositions

Dispositions	Expected Change
Successful remission	Increase
Drop out of therapy early	Decrease
Medical Evaluation Board & ADSEP	Decrease
Become long-term case (fail to exit)	Decrease





- > Training Decks
- > Factsheets & Handouts
- > Forms & Templates
- > Spreadsheets & Supporting Documents
- > Standard Operating Procedures

Managing Patient Throughput

Treatment Planning







- > Training Decks
- > Factsheets & **Handouts**
- > Forms & Templates
- > Spreadsheets & Supporting **Documents**
- > Standard Operating **Procedures**





Starting a

Evidence-Based Psychotherapies (E scientific evidence. This type of the problems. EBPs tend to be very stru

This is what an ERP session typicall

Orientation/Check-in (first

Mood Check: Every week, your pro

Review Outcome Measures: Outcor you about your symptoms. You and time to make sure treatment is wor

Agenda Setting (next 2-5 m

You and your provider will work top items are prioritized to determine

Homework Review (next 5

Your provider will review any home focusing on how the assignment tur you were not able to complete the time to work with you to problem-

Discussion of Agenda Items

This is the "meat" of the session. De

patterns, talking through how to handle upcoming situations, and discussing follow-up appointments. It's easy to get distracted by an in-depth discussion of what happened since the last session, so you and your provider have to work together to stay on track

New Homework (last 5-10 minutes of the session)

You and your provider will decide what sort of homework assignments will be done between sessions. Make sure you ask questions about the homework and agree with what it will involve. If you feel you aren't ready for something or don't

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Clinic Outreach Handout Services and Policies at {{INSERT CLINIC NAME}}

Thank you for taking some time to learn more about our clinic! This handout helps ensure that the agencies and people who refer patients to our clinic have up-to-date information on the services we offer and know some of the important policies under which we operate.

Services we primarily offer: {{Customize based on your clinic's capability}}

- Psychiatric medication management
- . Large range of group psychotherapy options across different days and times
- . Short term psychotherapy: 6-18 sessions, with most patients seeing symptom relief after 8
- A small number of long-term psychotherapy slots {{if clinic has a carve out for this}}

Services we are not able to offer: {{Oustomize based on your clinic's capability}

- . Long-term psychotherapy: After 20 sessions, a patient's care undergoes a thorough review and a determination of whether further care is warranted.
- · Neuropsychological testing: This service must be referred out into the network.
- Biofeedback: This service must be referred out into the network.

Information about our clinic policies: [{Customize based on your clinic's capability}]

- . Group therapy is a primary modality of care within our clinic. Nearly all patients with a depressive or anxiety disorder are expected to attend one or more types of group classes when they start with the clinic. We offer many evidence-based psychotherapy groups, as well as interpersonal/support groups.
- . We have an on-call provider assigned each day. If a crisis occurs and a patient requires an unscheduled walk-in, then the on-call provider will see them that day, as the primary provider will likely be booked with other patients.

Please see our "Clinic Services Handout" for information on the specific groups we offer. Also, we encourage you to provide a copy to the patient when making a referral.





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- > Standard Operating Procedures

Best Practices in Changing Levels of Care

Scenario #1: Provider decides to end individual therapy due to significant symptom remission. The therapist points out that the patient is no longer symptomatic enough to need weekly individual care. We have two scripts for this scenario, one offering a follow-on process group (Script A) and a second that ends therapy altogether (Script B).

		Therapist: So SGT Rias, I'd like to follow-up on our conversation from last week about ending therapy. As I look at the progress you have made in therapy, I have been very pleased with how much your symptoms have improved. You should be proud of the work you have dane, especially the exposure exercises you completed to confront your reactions to crowds and other triggers.	Provider had laid the groundwork prior to this meeting.
		{{shows patient print out of scores on outcome measure(s)}}	
The 20/20 review is a chance clinic. The frequency of this re fellow providers using a struc apportunity to problem-solve	eview cture	We can see that your scores on the PCL have steadily declined and are now in the sub-clinical range. This means that your scores on this scale are about the same as people who don't hove the disorder! This is the point in therapy where most people can either set a date to store coming in regularly or more to a maintenance group for continued therapy, if you think you've improved enough to consider ending therapy, then we'd set a date for our last session a few weeks from today.	Using scores on outcome measures helps show the progress made, especially if there is a non-clinical threshold to the measure.
Provider completes this sectio		SGT Rias: Well, I have been feeling a lot better, but I still have some nightmares and did have a panic attack about two weeks ago. Doesn't that mean I should still come in?	
Patient name:		Therapist: As we've previously talked about, it's important to have clear	Provider is setting a
Diagnoses:		expectations. It's common to still have some PTSD symptams even after successful treatment. You may have nightmares occasionally for the next several years, but they should increasingly become less intense and bother you less. Does that make	realistic expectation that therapy will not prevent all future
Admin status (Pending Profile/MEB/ ADSEP?):		sense?	symptoms
# of sessions/months of BH care prior to this clinic (prior duty stations):		SGT Rias: Sure Doc, but what if I need help later, like if my nightmares get worse again or I go back to lasing control of my temper and things like that?	
# of sessions to date (within this clinic):		Therapist: That's a great question and something you should be concerned about. I think you would be okay without regular follow-up, especially if you know that you	Offering a group as a transition is appropriate
# of sessions with current provider:		can come in PRN, meaning that you can and should book a fallow-up if something happens, like your symptoms come back. But if you are at all hesitant, then we can	for patients who are hesitant about ending
Formal outcome measures being used:		also have you check out our maintenance groups.	therapy altogether.
Group attendance history:		SGT Rias: What is the maintenance group thing? Should I go into something like that?	
Current treatment goals:		Therapist: These groups are for people who have ended individual therapy, but may need some extra help from time to time. They are a great option, especially if you aren't sure if you want to stop checking in regularly with us at the clinic.	Provider is setting a realistic expectation that therapy will not
# of additional sessions			L
anticipated to treat the patient:			
Modalities used	Indi		

(Circle all that are being used with this patient; indicate frequency of appointments per week

1





- > Training Decks
- > Factsheets & Handouts
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- Standard Operating Procedures

NOTE TO USER- This template is intended to give your clinic a head start on developing its own SOP/OI for this topic. The template can quickly be adapted to fit your clinic's needs, dropping content you do not need and adding anything you feel is relevant. Note that there are several highlighted areas, which should be addressed as you customize this template for your clinic.

Subject: Standard Operating Procedures (SOP)/Operating Instructions (QI) for the disposition of patients desiring ongoing individual psychotherapy when it is no longer clinically indicated at the [Behavioral Health Clinic] at [Medical Center].

Purpose: To establish a structured, efficient, and ethical process for disposition of patients who desire ongoing individual psychotherapy when it is not clinically indicated, and outline clinic management and provider responsibilities relevant to this process.

References: [add any clinic SOPs/OIs that are referenced in this document]

Objectives.

1.1. This policy aims to inform providers and administrators regarding the processes for monitoring and managing the subclinical population within the clinic.

2. Responsibilities.

- 2.1. [Clinic management] has the overall responsibility for continual reinforcement to providers and patients that the role of military behavioral health clinics is to treat all beneficiaries within the MTF's catchment area. Clinic management is responsible for ensuring that clear clinic guidelines regarding when individual psychotherapy will be terminated are disseminated to all clinic providers.
- 2.2. (Providers) have the responsibility to ensure that patients understand that a course of individual psychotherapy is time-limited, and that the clinic is not able to provide long-term individual therapy. Providers will establish an expected time-frame for the course of therapy with the patient based on the presenting clinical disorder at the onset of treatment. Providers will share with the patient how clinical progress will be measured and will provide ongoing feedback to the patient regarding clinical progress. Providers are responsible for following the procedures as outlined in this document.

General.

- 3.1. As part of the effort to optimize services, the clinic will implement procedures to guide decisions regarding termination of individual psychotherapy for patients whose clinical condition no longer warrants ongoing individual therapy.
- 3.2. This SOP/OI applies to all staff working in the behavioral health clinic.





<u>Summary</u>

 Distinguish different factors affecting patient throughput in clinics

 Analyze strategies for addressing influx of patients, managing ongoing cases, and closing cases within a clinic



Clinic Optimization Toolkit

Modules

Types of Resources

Clinic Gap Analysis

Patient Management

EBP Utilization

Group Therapy Expansion

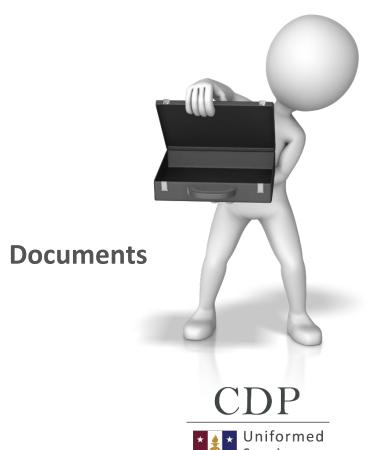
> **Technician Support**

> > **Metrics**

Evaluation

Training Decks

Spreadsheets &





Center for Deployment Psychology

Department of Medical & Clinical Psychology
Uniformed Services University of the Health Sciences
4301 Jones Bridge Road
Bethesda, MD 20814-4799

Contact Us

Email: cdp-ggg@usuhs.edu

Website: deploymentpsych.org

Facebook: http://www.facebook.com/DeploymentPsych

Twitter: @DeploymentPsych

