

Patient Flow and System Utilization Strategy



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INTRODUCTION

WHAT ARE PATIENT FLOW AND SYSTEM UTILIZATION?

Patient Flow is about the need to match supply and demand using efficient processes that are data driven, based on quality care and result in optimal health outcomes. **Health Care (System) Utilization** is the evaluation of the appropriateness and medical need of health care services, procedures and resources.

PURPOSE OF THE PATIENT FLOW & SYSTEM UTILIZATION STRATEGY

This document supports Health PEI's strategic focus and direction over the next three years. Objectives and priorities will be pursued in an effort to respond to the health care needs of Islanders. The Strategy articulates a renewed commitment to improving the efficiency and effectiveness of acute care and community services and resources.

CURRENT CONTEXT

THE HEALTH CARE SYSTEM

Access to acute services across Canada has been increasingly challenged; a highly demanding and shifting population with increasingly complex chronic disease management needs has highlighted that challenge¹. The PEI Health System has experienced a growing demand for both acute and community services, broadly evidenced by escalating health system costs. These are due in part to the province's aging population and to a rising burden of illness from chronic diseases^{2,3}. Additional complexity has resulted from restructuring efforts and historical silos between departments, services, facilities, and units.

Optimizing the use of resources across the organization is an ongoing priority for Health PEI⁴. Patient flow and system utilization practices, which are rooted in a systems-based approach, can help match supply and demand by using efficient processes that are data driven, and based on quality care and good health outcomes. For the PEI Health System to work effectively, facilities and services across the continuum need to understand, appreciate, and support necessary interconnected working relationships⁵. This implies a greater focus on proactive transfers and repatriation from tertiary care hospitals to more appropriate care settings. Enhancement of inter-facility consultations and collaboration must support these efforts. Transition processes across all sectors need consistent attention, as they hold inherent risks for patients and clients (see Figure 1).

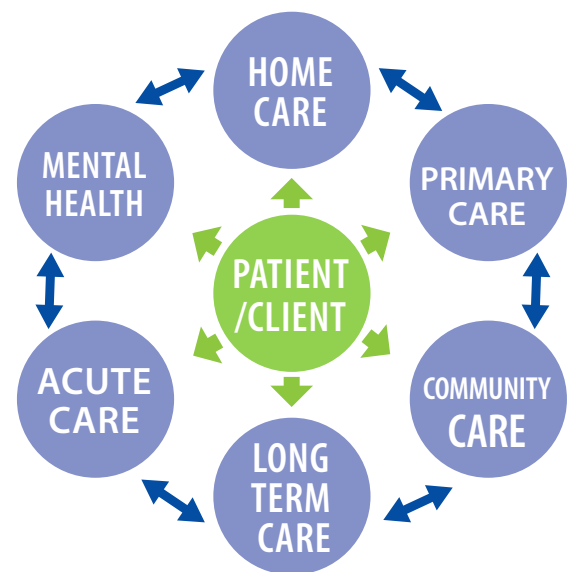


Figure 1. Interconnections

Alternate level of care (ALC) describes patients waiting for a bed or service which better meets their care needs. Accurate ALC coding is essential so that the health system can plan for appropriate facility and service enhancements.

WHAT THE DATA SHOWS

Data analysis has shown that significant gains in terms of both service provision and cost savings can be realized for Health PEI with attention to these key areas:

- Acute bed utilization
 - Hospital occupancy rates are high;
 - discharge planning roles require clarity;
 - ALC patients wait for appropriate care locations or services
 - Admitted patients wait in the Emergency Dept (ED);
 - timely transitions to inpatient beds will reduce ED length of stay
- Utilization of support services e.g. Diagnostic Imaging, Laboratory Services
 - Choosing Wisely campaign provides standard best practices
- Comprehensive supports for high users of health care
 - Over 70% of health services are used by just 5% of our Island population

Management of care beds and other key resources such as diagnostic and lab services, and primary care capacity must be key areas of focus⁶. Investment of time and resources into bed management approaches and technologies, and effective and efficient utilization of resources that will support patient flow at the unit, facility, regional and provincial levels are required.



DEVELOPMENT OF THIS STRATEGY

The 2017-20 Patient Flow & System Utilization Strategy builds on existing work¹ within Health PEI that addresses access and flow issues for patients and clients across the health care continuum. It provides a framework for further advancements that will support the PEI Health System in delivering the best possible health outcomes in a highly effective and efficient manner. The over-arching focus of the Strategy is to enhance patient and client flow within acute and community sectors, optimizing transitions between sites, services and programs.

Improvements will be accomplished through data analysis, consultation, planning and implementation of priority initiatives identified within and across sectors. Four key enablers will underpin the work. The foremost of these is *Being Data Led*; the others are *Leadership and Accountability, Governance and Structure, and Engagement and Education*. These enabling mechanisms serve as foundational components to the Strategy, and are essential for identified initiatives and objectives to move from thought to action.

Several key activities informed the development of the Strategy:

1. Presentations and discussions based on best practices and informed evidence from other jurisdictions nationally (e.g. Regina Qu'Appelle Health Region);
2. International research review of 45 documents, and national jurisdictional scan of best practices in 13 key health regions;
3. Medworxx Patient Throughput Review (PTR);
4. Modeling and analysis of acute care health data and processes; and
5. Patient Flow Engagement Forum; key stakeholder input and information sharing

These activities served both to inform our sphere of focus, and to engage and educate leaders and staff so they might be empowered to contribute to smoothing patient flow within their capacity and care setting.

STRATEGIC ALIGNMENT

The Patient Flow & System Utilization Strategy aligns with Health PEI's strategic focus and direction over the next three years (2017-20). The fundamental objective is that processes will be better streamlined so that patients and clients get the right care, in the right place, by the right provider(s), for the appropriate duration of time. This will ensure that resources are most efficiently and effectively used in the creation of a high-quality, sustainable health system.

Alignment

- *Aligns with Health PEI's strategic mission and goals*
- *Is an Accreditation Canada Required Organizational Practice (ROP)*

The Health PEI Strategic Plan, under Goal #3: *Innovation and Efficiency* identifies the strategic priorities of patient flow and reducing Emergency Department (ED) wait times. Specific areas of concentration to inform these priorities include acute bed utilization, including ED to inpatient flow and improved management of ALC patients; DI and Lab test utilization using the Choosing Wisely campaign; and a focus on high users of our health system resources to ensure the most effective supports are identified and provided. A summary of the core elements of Health PEI's Strategic Plan is provided in Appendix A.

¹ 2008 Corpus Sanchez Review of the PEI Health System & 2010 Health PEI Provincial UM / PF Framework

OUR APPROACH

The Patient Flow & System Utilization Strategy creates a roadmap for improvement for facility and sector-specific challenges. We need to facilitate an efficient flow of patients and clients who do not wait unnecessarily to receive the care they need. Data analysis will be used to identify the indicators and key drivers which most impact the continuity of care. This information will inform consultation and discussion at the site and sector level, where planning with leaders and key physicians and staff will guide priority setting and project implementation. Data monitoring will inform and support leaders and staff in making decisions with respect to continuing or redirecting efforts.

USING ENABLERS

The Patient Flow & System Utilization Strategy is built on four evidence-informed, explicit and essential enablers (see Table 1). These will inspire progress in the strategic priority areas outlined later in this document.

Enabler #1: Being Data Led – Identifying Barriers and Defining Desired Outcomes

Evidence Informed Decisions: In today's health environment, improving system performance relies strongly on data⁷. Research and practice demonstrate that using data effectively can provide significant improvements and solutions to bottlenecks in patient flow processes. Merely sharing data does not provide solutions, but those who use it can. When data is accessible in a timely and consistent way and is used across staffing levels and locations, it helps everyone make evidence informed decisions that benefit patients and clients.

Monitoring: Patient flow progress will be monitored through several key metrics. It is essential to review and assess these metrics regularly through current and evolving reporting frameworks that communicate accurate and consistent data to leaders and clinicians. A dedicated Health Information Specialist will provide timely, standard reporting so that this information is available to support decisions and activities that improve flow.

Enabler #2: Leadership and Accountability

Evidence⁸ shows that in order to effectively influence patient flow, leadership is key. When patient flow initiatives are championed by senior leadership they:

- move indicators in the direction of improvement and success
- support engagement from the front line through to the executive level
- recognize and advocate physician involvement and leadership as essential

System leadership and accountability, along with clear communication, are directly linked to the achievement of goals and outcomes identified at the site and sector level. It is critical to develop ownership of results at both executive and operational leadership levels, so that physicians and staff observe and are motivated to engage in system-wide and collaborative patient flow practices, and are accountable to leaders, each other, and the patient or client.

Enabler #3: Governance and Structure

Linked with transparent and accountable leadership are robust foundational governance and corresponding structure. Several trends and themes emerged from our jurisdictional review and the Patient Flow Forum with respect to essential elements. Successful jurisdictions have built a supportive structure from top to bottom: strong leadership, with core work directed by a Patient Flow manager and supported by clinical leads, coordinators and data specialists. Developing and maintaining a streamlined and supportive structure has been emphasized by most sources as essential to achieving meaningful outcomes.

Reporting to the Senior Management Group (SMG), the Provincial Patient Flow Steering Committee will provide direction and oversight for the priorities and the strategic intent of patient flow initiatives. Working groups will carry out the work as identified and prioritized from the data and leadership. A Provincial Patient Flow & System Utilization Advisory Committee will provide system and sector level advice and support, as well as a patient /family perspective.

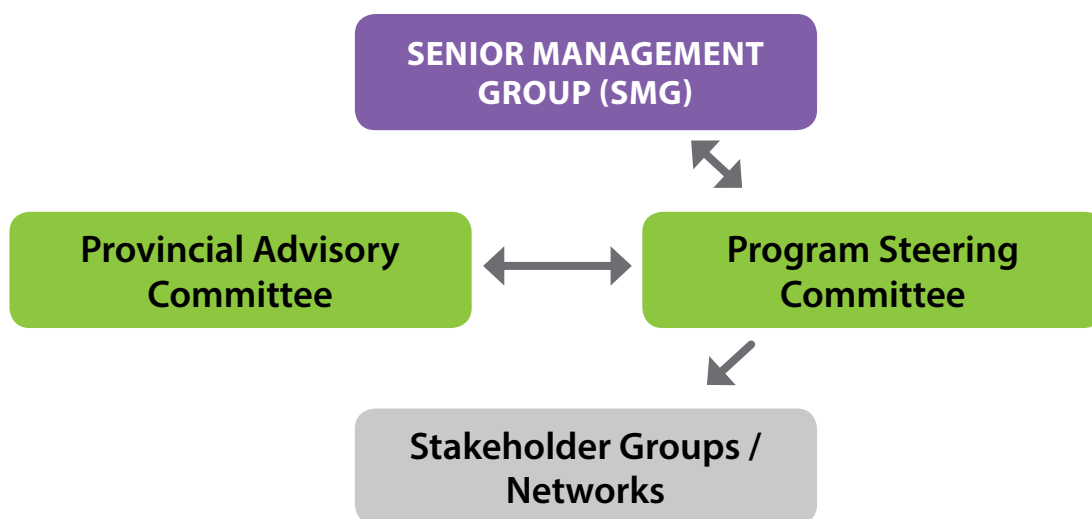


Figure 2. Strategic Governance and Committee Structure

Enabler #4: Engagement and Education

To ensure patient flow remains a priority and continues to improve in Prince Edward Island, health system leadership, physicians and front-line staff must be knowledgeable, and actively engaged. Evidence demonstrates physician and staff engagement and their investment in improving patient flow can be a significant enabler of how successful initiatives and strategies will be⁹. Improving patient flow is about taking action to make the whole health system better¹⁰. System wide change necessarily includes a change management component that helps ensure everyone understands and plays a role in implementing and reinforcing that change. This includes regular opportunities for all Health PEI leadership and stakeholders to review progress, and strategies, and engage in dialogue about flow. E.g. annual Patient Flow & System Utilization Forum. Engagement and education are also linked to sharing and using data. To be engaged and informed, leaders and staff must understand the data; why we are using it, what it tells us, and how it can strengthen practices and form the foundation for informed decisions.

TABLE 1: SUMMARY OF ENABLERS WITH RECOMMENDED ACTIONS FOR IMPLEMENTATION

ENABLERS	WHY?	WHO?	HOW? (EXAMPLES)
BEING DATA LED	Use data to make informed decisions	DEDICATED DATA ANALYST	<ul style="list-style-type: none"> Ensure there is standard and robust data collection and reporting at all levels. Use automated reports and dashboards to drive operational work and inform leaders and the front line. Support development and delivery of data monitoring and reporting tools and education across sectors. Support enhancement and/or future attainment of validated bed management tools and systems.
LEADERSHIP AND ACCOUNTABILITY	Set and support clear leadership	PF CHAMPION(S) AND FUNCTIONS AT THE SMG LEVEL	<ul style="list-style-type: none"> Utilize Patient Flow Leadership Champions within Health PEI; Ensure that the Patient Flow & System Utilization Manager and provincial Steering and Advisory Committees communicate with senior leadership and clinical management regularly.
	Set clear, data led targets/goals		<ul style="list-style-type: none"> Share data regularly at all levels to measure against indicator targets, e.g. hold bi-weekly management 'huddles' to review data and identify/address barriers to flow. Regularly review bed alignment with respect to utilization for each medical service.
	Support collaboration		<ul style="list-style-type: none"> Establish clear communication and accountability around priorities for care teams and leaders, so they understand, follow and promote identified activities e.g. EDD setting, discharge planning documentation. Provide system wide support and encourage collaborative practices (linked with educational and engagement above)
GOVERNANCE AND STRUCTURE	Create Provincial Advisory and Steering Committees	GOVERNANCE / STRUCTURE SUPPORT PF WORK	<ul style="list-style-type: none"> Establish a provincial Advisory Committee to provide sector specific advice and support for priorities and initiatives. Establish a provincial Steering committee to provide direction, and monitor priorities and the strategic intent of patient flow initiatives. Establish operational leadership and/or working groups as needed to identify, approve and support specific objectives and initiatives to carry out the work.
	Define functional team and roles		<ul style="list-style-type: none"> Secure a functional 'team' to move initiatives forward and support accountability (E.g. PF/SU Manager, System Optimization Analyst, Policy Lead, HI Specialist)
	Set & manage priorities		<ul style="list-style-type: none"> Set SMART goals using provincial data that is collected, tracked, and managed using regular reporting time lines.
ENGAGEMENT AND EDUCATION IN SYSTEM WIDE CHANGE	Change culture; obtain commitment by leadership/staff	PF CHANGE MANAGER TO DESIGN / LEAD	<ul style="list-style-type: none"> Establish regular checks and communication around the Strategy and initiatives by leaders E.g. Develop a Communication Plan that includes memos from SMG, fact sheets and videos that share common messages.
	Provide education		<ul style="list-style-type: none"> Provide training opportunities on how we can streamline patient flow (E.g. lunch and learns; PF Forums)
	Seek public and client engagement		<ul style="list-style-type: none"> Arrange education and engagement opportunities for the public (patients, families, staff, politicians, etc); e.g. Education and engagement forums; Discharge planning workshops, etc.

DESIRED OUTCOMES: GUIDING STRATEGY TO ACTION

KEY INDICATORS

Current priorities at the system level are described by the Health PEI Strategic Plan and Accreditation Canada requirements. System level objectives and indicators will be established through development of the Health PEI Business Plan; those specific to current priorities will include:

- Decrease in *hospital occupancy rates*,
- Decrease in *ELOS variance*², and
- Decrease in *Emergency Department wait times for admitted patients*.

Additional objectives and/or indicators will be added as they are determined by leaders or stakeholders involved in or advancing current and future initiatives. Future initiatives (also included in the 2017-2020 Health PEI Strategic plan) may also look like:

- ✓ Improving Hospital (Acute Care) Utilization
 - o Improve management of acute care hospital beds to reduce time from bed request to patient transfer
 - o Improve Alternate Level of Care designation processes
 - o Use findings and key drivers from modeling and analysis of provincial data for additional improvements both hospital and system wide
- ✓ Improving Patient Flow
 - o Implement provincial Patient Flow & System Utilization Strategy to provide a foundation for patient flow within Health PEI
 - o Improve flow for patients from the emergency department to an inpatient bed.
- ✓ Supporting *Choosing Wisely*® program for appropriate utilization of hospital resources such as diagnostic imaging and lab tests
- ✓ Emergency Department improvements through expansion of providers' scope of practice and service delivery [e.g. rapid access zones for CTAS (Canadian Triage and Acuity Scale) Levels 4 and 5, or expanded staffing complements (e.g. Nurse Practitioners or Social Workers)] to reduce wait times
- ✓ Using telemedicine and other innovative technologies where possible that improve access, coordination, and convenience for patients and staff, ensuring that policies for implementation and infrastructure are available

² The average number of acute days in acute care hospitals compared to expected length of stay (Statistics Canada, 2000).

Data analysis and findings will be used to prioritize future initiatives; data will help highlight inefficiencies and/or excessive waits and support the Patient Flow program area in determining where efforts and resources will have the most effect. The potential benefit or value (e.g. better patient outcomes, process efficiencies, and dollar savings) and degree of effort will be considered. Opportunities will be quantified as much as possible so that linkages and priority setting are strengthened through a full understanding of potential gains across the care continuum.

The realization of desired outcomes will be supported broadly through collaborative care planning, connectivity with and among community partners, and in future a single Electronic Health Record. Patient outcomes and system sustainability will both be enhanced when practical alternatives to acute care treatment are developed and spread. Recognition and use of resources such as Nurse Practitioners, and services such as Home Care, are examples of essential elements to a progressive and sustainable health system.



PATIENT FLOW & SYSTEM UTILIZATION STRATEGIC DIRECTION – EXECUTIVE SUMMARY



Figure 3. Patient Flow & System Utilization Strategic Direction

CONCLUSION

The vision for this Patient Flow & System Utilization Strategy is to support enhanced access to quality patient and client care in the most efficient manner possible. Successful implementation of the Strategy is dependent on the four enablers as fundamental elements in moving toward improved outcome and indicator results for the Health PEI system. With these enablers in place, the more challenging and complex activities can be implemented and achieved through leaders, physicians and staff who are supported in enhancing the process and the progress within a more collaborative system. Health PEI is committed to using our data to make evidence-informed decisions and to monitor our progress based on the goals and indicators identified through implementation of this Strategy. This is a system-wide initiative that also acts as an enabler - to hold us all accountable for patient flow within a System committed to improving health services for Islanders.

APPENDIX A: HEALTH PEI'S VISION, MISSION, VALUES AND GOALS

STRATEGIC DIRECTION		
VISION		
One Island health system supporting improved health for Islanders.		
MISSION		
Working in partnership with Islanders to support and promote health through the delivery of safe and quality healthcare.		
VALUES		
<i>Caring</i>	<i>Integrity</i>	<i>Excellence</i>
We treat everyone with compassion, respect, fairness and dignity.	We collaborate in an environment of trust, communicate with openness and honesty and are accountable through responsible decision-making.	We pursue continuous quality improvement through innovation, integration and the adoption of evidence-based practices.
GOALS		
<i>Quality and Safety</i>	<i>Access and Coordination</i>	<i>Innovation and Efficiency</i>
Support a culture of quality, safety and security in Health PEI	Provide access and coordination to community health and mental health and addictions to meet the needs of Islanders	Develop new and innovative approaches to improve the efficiency and utilization of acute care services and ambulatory care resources

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Health PEI

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