

# Advising Through a Crisis— Implementing Open and Direct Scheduling During a COVID-19 Surge

## Background and Challenge

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During a recent pandemic surge, Monument Health's nurse triage line was overwhelmed by patients calling to schedule COVID-19 tests and ask about symptoms. The resulting long wait times, over 60 minutes on average, were frustrating patients and preventing the organization from scheduling the volume of tests they were prepared to perform. Staff on the triage line, attempting to better serve the patients calling in, had even given up essential nursing duties like care coordination and positive results calls. Speeding up test scheduling and getting nurses back to working at the top of their licensure became critical for Monument Health.

- **Location:** Rapid City, South Dakota
- **5** Hospitals
- **8** Specialty and Surgical Centers
- **40** Medical clinics and health careservice centers

## Goals and Solution

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Monument's plan was to implement open and direct scheduling through an online portal where patients could triage their own symptoms and schedule a COVID test themselves. If Monument could simultaneously decrease the volume of incoming calls and get more tests scheduled, they would free up nursing resources and better serve the community.

To enhance the online scheduling portal, the team integrated a chat bot that can identify patients with high priority testing needs, such as Monument employees and symptomatic patients, and categorize patients by MyChart status. Asymptomatic patients were to be excluded from open and direct scheduling at first, but the project included plans for serving them in the future.

## Execution

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### Stepping up for a public emergency

The surge in COVID-19 cases in South Dakota constituted a critical public health emergency, with cases rising exponentially over the summer and early fall. Throughout the month of August, the seven-day rolling average of new cases in South Dakota increased from 80 to 298. These numbers were already straining Monument's scheduling capacity and continuing to rise, increasing to 410 cases by the project kickoff on September 28th and 1,154 by Tegria's roll-off on November 6th.

### Adapting to an accelerating timeframe

Due to the increasingly emergent situation, the implementation timeline of the self-scheduling website and chat bot needed to be cut by more than half, from six weeks down to two and a half. Tegria adapted quickly to the accelerated timeline and provided both the project planning and technical expertise to keep the project on track.

With the reduced timeline, Tegria and Monument focused on developing a minimum viable product for patient self-scheduling. Some desired features of the engagement, like developing and testing a results interface with the State Department of Health, were put on the back burner to get Monument live as quickly as possible.

### Providing an advisory partnership

As Monument staff implemented the self-scheduling solutions, Tegria guided their build, monitored the issues they encountered, and helped resolve them in the moment. The team helped the client analysts define the end-to-end workflows, translate handoffs, and make changes to the current state process. We offered on-the-spot guidance and helped come up with creative solutions to issues as they arose. With such an intense timeline, managing stress and preventing new issues was paramount.

Although Tegria did not have access to the Epic environment to complete the build ourselves, our team worked side by side virtually with Monument staff through the entire project, letting them lean on our experience to make important decisions quickly and keep the project on track.

## Outcomes

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The chat bot and self-scheduling option work in tandem to reduce the strain on the nurses working the nurse triage line, who have resumed answering community positives calls and care coordination duties. Additionally, because nearly half of their COVID tests are now scheduled through the website, patients who call in for support reach a nurse in less than ten minutes. The increased scheduling capacity provided by the self-scheduling website has allowed Monument Health to use its testing capacity more fully and has helped to nearly double the number of tests scheduled daily.

- Call volume reduced from 441 on October 13th to a low of 108 on October 25th
- Reduced call wait times from over 60 minutes to under 10 minutes
- Increased self-scheduled appointments to 45—61% of total COVID-19 testing appointments three weeks post-live
- Doubled the amount of total tests scheduled in three weeks post go-live; 2,505 appointments self-scheduled online and 2,616 scheduled by nurses over the phone



Partnering with the team in implementing additional scheduling options for COVID-19 testing for our community was a great experience. The partnership allowed us to augment the strengths of our own analyst team and expedite the build to meet our organization and community needs. The knowledge, collegiality, experience and professionalism from their team is very impressive and made them a great team to work with.

—Dr. Alexia Gillen D.O., Monument Health