



PRODUCTIVITY:

A Function of Efficiency and Organization in Service Delivery

PRODUCTIVITY

DISCUSSION OUTLINE

- Service Provision Process in a Systems Context
- Productivity as a Process
- Premises/Stages in the Service Provision Process
- Strategies for Efficiency
- Questions/Answers

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SERVICE PROVISION PROCESS in a SYSTEMS CONTEXT

Implications of the Shift from County-/Program-Funding
to a Fee-for-Service Environment:

- Shift from “Funding Preceding Service Provision” to
“Service Provision Preceding Payment for Services
Rendered.”

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SERVICE PROVISION PROCESS in a SYSTEMS CONTEXT

Implications of the Shift from County/Program-Funding to a
Fee-for-Service Environment:

In order for consumers to continue to receive services....

- The provider agency must remain fiscally viable.

In order for the provider agency to remain fiscally viable....

- The provider agency must be as efficient/organized as possible.

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SERVICE PROVISION PROCESS in a SYSTEMS CONTEXT

Implications of an Agency's Not-for-Profit Status:

- There are limits regarding the use of funds/revenue.

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AS A PROCESS

- Productivity is Not Primarily a Fiscal Function.
- Rather, Productivity Naturally Results from:
 - **Adherence to high standards of clinical practice** in the provision of services; and
 - **Efficiency** and **organization** in performing case management functions.

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AS A PROCESS

The system is designed to financially encourage/reward sound practices in the provision of services.

- For example, the most effective case management activities are reimbursable - i.e., face-to-face and telephone contacts with consumers and other involved/significant persons.

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“ MAXIMIZING YOUR DAY”

Examples include, but are not limited to:

- Engaging providers, family members, and other significant persons in planning whenever possible;
- Reviewing/completing records with consumers as clinically appropriate;
- Maximizing face-to-face/telephone contacts with consumers in the course of organizing activities (e.g., voice-mail, scheduling) to minimize “down” time in office.

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PREMISES/STAGES in SERVICE PROVISION

- Targets for revenue (in terms of billable units needed to meet the costs of providing services) are established by the provider agency's Fiscal Department.
- Direct service staff provide services according to the highest/most effective standards of practice and the provider agency's model of case management functions.

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PREMISES/STAGES in SERVICE PROVISION

Direct service staff credit themselves by completing paperwork accurately:

- Timely completion of progress notation;
- Accurate progress notation.

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PREMISES/STAGES in SERVICE PROVISION

Management/Supervisory staff assist direct service staff by helping them to organize and document their activities in the most *efficient* and *accurate* manner possible.

- Provider Agency Fiscal Department
- Provider Agency IT Department

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Premises/Stages in Service Provision

The Provider Agency Fiscal Department provides support by:

- Providing data for use by management/supervisory staff in helping direct service staff to efficiently organize their activities;
- Billing for services in the most efficient and accurate manner possible.

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Premises/Stages in Service Provision

SAM IT department supports case management services by:

- Managing data/records related to consumer information, provision of services, billable activities, etc.

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Premises/Stages in Service Provision

- Billing is completed according to the actual provision of services.
- As a result, the necessary revenue is generated for the continued provision of services.



Productivity

Strategies for Efficiency and Organization

- Create a to-do list
- Maintain awareness of units available in the work day
- Maintain awareness of time spent during the work day
- Schedule case management activities and events back-to-back
- Consider geography when scheduling appointments
- Complete full unit(s) of service
- Minimize “down time”
- Review pertinent information (i.e.: incidents, previous service notes) prior to contacts to ensure productive contact
- Ensure follow-up activities are completed on a timely basis
- Use a schedule/calendar
- Activity Log Implementation/Process

Presentaion Calendar - Microsoft Outlook

File Edit View Go Tools Actions Help

New X Today Search address books

ESET NOD32 Antivirus

Day Week Month Show work week Show full week

June 18 - 22, 2012

Search Presentaion Calendar

Navigation Pane

	18 Monday	19 Tuesday	20 Wednesday	21 Thursday	22 Friday
8 am					
9:00	M.S. enter ISP	travel	Flex	Travel/Time Sheet/ Au	Flex
10:00	KG enter service note MS Service note Travel	B.C. SIS	Travel/Timesheet/ Activity Logs	On Line Training Supervision	BN enter Service note & Monitoring S.d. H.J. P.O. T.O Telephone calls
11:00	D.D. GK Monitoring Day Program		K.L, H.J., & T.O enter service notes/ monitorings	Travel	Break
12:00	break	BC Service Note	Break	B.W. ISP	Enter B.W ISP
1:00	DD GK Service notes/ I	Travel	Send t.T.P.O K.L. Invite	Lunch Break	lunch
2:00	Lunch	CK, M.B & DC. Monitors Day Program	Travel	Travel	Staff meeting
3:00	Travel	J.J ISP	Lunch	B.N.Team Meeting	S.S. B.D. J.K. C.V phone calls and service notes
4:00	Break	C.K M B. D.C enter monitorings service notes	B.B.Enter Service note/ Monitoring	Break	CK, M.B & DC enter monitorings
5:00	J.J Enter Service note & ISP	Break	TK Phone calls	BN Monitor	Travel/Timesheet/ Activity Logs
6:00	Travel/ timesheet/A	Travel	G.K Service Notes	SZ Monnitor	
7:00	travel	K.L, H.J., & T.O Monitoring CLA	Travel	Travel	
8:00		Travel			

Tasks: 192 Active tasks, 1 Completed tasks

62 Items

This folder is up to date. Connected to Microsoft Exchange

10:23 AM 06/18/2012

IDD - ACTIVITY LOG DEFINITIONS

* Note - All totals are pre-populated. (Columns 1, 4 & 5)

(2) HOURS WORKED

Enter hours worked as reflected on your timesheet. (The corresponding units will populate automatically.)

(3) TIME OFF

Enter any paid or unpaid hours off as reflected on your timesheet. (The corresponding units will populate automatically.)

(6) BILLABLE CONSUMER UNITS

Enter billable units. (All 15-minute activities that are billable in HCSIS.)

(7) NON-BILLABLE CONSUMER UNITS (Base)

Enter non-billable units. (All 15-minute activities that are non-billable in HCSIS.)

(Examples: Consumer who is not MA-eligible, or is in another MA-paid facility; such as a hospital, nursing home, prison)

* Note: Discharge planning in this case is billable.

(8) NON-BILLABLE ACTIVITY

Enter activity that does not equal a 15-minute unit regardless of whether or not the consumer is billable or non-billable.
(Reflected as zeros in HCSIS) Please explain activity on activity log.

(9) NON-BILLABLE TRAVEL

Enter travel units.

(10) TRAININGS, WORKGROUPS, SUPERVISION, STAFFING - Enter units for:

* Staff Meeting as defined by a Supervisor

* On-line trainings

* CARF Trainings

* Outside Trainings

* Union Meetings

* All Staff Meetings

* Peer Mentoring/Shadowing/New Staff

* Supervision time separate from file review
(captured in columns 6 or 7)

* Non-billable E-mail,

Timesheet & Travel,

Outlook Calendar

(11) NON-PRODUCTIVE ACTIVITY

* Breaks Please explain activity on activity log.

ACTIVITY LOG - IDD

NAME:					CASELOAD:					MONTH:							
(1) Date	(2) Hours Worked	(3) Time Off	(4) Hours Worked Units	(5) Time Off Units	(6) Billable Consumer Units	(7) Non-Billable Consumer Units (Base)	(8) Non-Billable Activity <i>(Reflected in Notes as Zeros)</i>	(9) Non-Billable Travel	(10) Trainings Workgroups Supervisions Staffings	(11) Non-Productive Units	Avail. Units	Total Units (6-11)	Over/ (Under) Units	Productivity Target (500)	Please explain non billable and non productive activity		
1st			0	0							0	0	0	500			
2nd			0	0							0	0	0	500			
3rd			0	0							0	0	0	500			
4th			0	0							0	0	0	500			
5th			0	0							0	0	0	500			
6th			0	0							0	0	0	500			
7th			0	0							0	0	0	500			
8th			0	0							0	0	0	500			
9th			0	0							0	0	0	500			
10th			0	0							0	0	0	500			
11th			0	0							0	0	0	500			
12th			0	0							0	0	0	500			
13th			0	0							0	0	0	500			
14th			0	0							0	0	0	500			
15th			0	0							0	0	0	500			
16th			0	0							0	0	0	500			
17th			0	0							0	0	0	500			
18th			0	0							0	0	0	500			
19th			0	0							0	0	0	500			
20th			0	0							0	0	0	500			
21st			0	0							0	0	0	500			
22nd			0	0							0	0	0	500			
23rd			0	0							0	0	0	500			
24th			0	0							0	0	0	500			
25th			0	0							0	0	0	500			
26th			0	0							0	0	0	500			
27th			0	0							0	0	0	500			
28th			0	0							0	0	0	500			
29th			0	0							0	0	0	500			
30th			0	0							0	0	0	500			
31st			0	0							0	0	0	500			
	0	0	0	0	0	0	0	0	0	0	0	0	0	500			

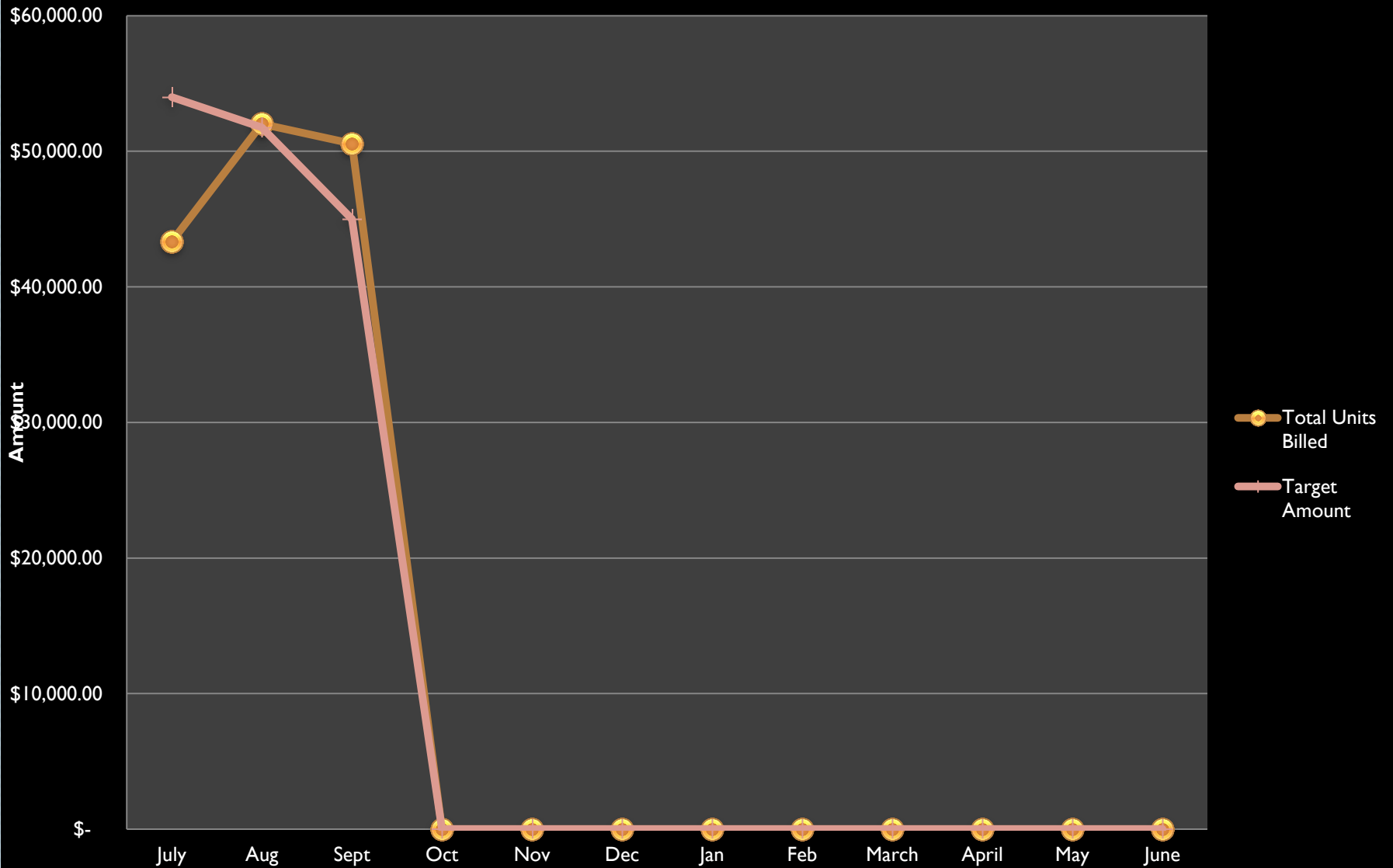
ID ACTIVITY LOG SUMMARY -SEPTEMBER 2011

(1) Name	Start Date	Caseload Size	(2) Hours Worked	(3) Time Off	(4) Hours Worked Units	(5) Time Off Units	(6) Billable Consumer Units	(7) Non-Billable Consumer Units (Base)	(8) Non-Billable Activity (Reflected in Notes as Zeros)	(9) Non- Billable Travel	(10) Trainings Workgroups Supervisions Staffings	(11) Non- Productive Units	Avail. Units	Total Units (6-11)	Over/ (Under) Units	Productivity Target (500)
Mary Brown	9/22/08	45	150.5	15.5	602	62	417	88	12	46	21	18	602	602	0	-67
Bill White	3/9/09	37	153.25	22.5	613	90	493	2	1	112	3	2	613	613	0	-85
Sally Smith	8/25/08	40	145.25	26	581	104	458	21	1	78	23	0	581	581	0	-83
Jim Beam	9/26/11	23			0	0							0	0	0	0
Ann Green	2/23/09	43	165.75	7.5	663	30	497	9	0	100	56	1	663	663	0	-36
Sue Blue	6/5/06	35	156.75	17.75	627	71	453	0	7	93	73	1	627	627	0	-24
John Wayne	Supervisor						139	23								88
Tim Reed	Supervisor						200	9								41
		223	771.5	89.25	3,086	357	2,657	152	21	429	176	22	3,086	3,086	0	-166

ID - FISCAL SUMMARY**PRODUCTIVITY REPORT - FY 2011/2012****PERIOD ENDING: September 30, 2011**

Month	Number of Employee's	Targeted Units 500	Total MA Billable Units	Total Base Units	Target %	MA Billed (Units x \$18.00)	Base (Units x \$18.00)	Total Units Billed	Target Amount	Difference of Target Amount vs. Billed Units
July	6	3000	2237	171	80%	\$ 40,266.00	\$ 3,078.00	\$ 43,344.00	\$ 54,000.00	\$ (10,656.00)
Aug	5.75	2875	2753	137	101%	\$ 49,554.00	\$ 2,466.00	\$ 52,020.00	\$ 51,750.00	\$ 270.00
Sept	5.00	2500	2657	152	112%	\$ 47,826.00	\$ 2,736.00	\$ 50,562.00	\$ 45,000.00	\$ 5,562.00
Oct								\$ -	\$ -	\$ -
Nov								\$ -	\$ -	\$ -
Dec								\$ -	\$ -	\$ -
Jan								\$ -	\$ -	\$ -
Feb								\$ -	\$ -	\$ -
March								\$ -	\$ -	\$ -
April								\$ -	\$ -	\$ -
May								\$ -	\$ -	\$ -
June								\$ -	\$ -	\$ -
YTD		8375	7647	460	97%	\$ 137,646.00	\$ 8,280.00	\$ 145,926.00	\$ 150,750.00	\$ (4,824.00)

Target v. Billed



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A Function of Efficiency and Organization in Service Delivery

Productivity is a process that results from high standards of practice, efficiency, and organization in performing case management and billing functions.

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Questions & Answers

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Thank you for your attentiveness and participation!

Contact Information: www.sam-inc.org