



NATIONAL ASSOCIATION OF
Community Health Centers®

2023 Outreach and Enrollment Learning Collaborative

Workshop #2 – April 5th, 2023

Direct Observation & Current State
Mapping



THE NACHC MISSION

America's Voice for Community Health Care

The National Association of Community Health Centers (NACHC) was founded in 1971 to promote efficient, high quality, comprehensive health care that is accessible, culturally and linguistically competent, community directed, and patient centered for all.





NATIONAL ASSOCIATION OF
Community Health Centers®

THANK YOU TO ALL COMMUNITY HEALTH CENTERS

#ThankYouCHCs

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Workshop Housekeeping & Etiquette

Rename Zoom Name: Full Name, Org (Ted Henson – NACHC)

Create Learning Zone, Minimize Distractions

Mute Yourself Unless Speaking

Raise Hand to Ask Questions or Utilize Chat

Keep Video On & Engage During Breakout Discussions

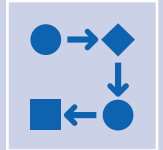
Agenda

- Introduction + Outreach & Enrollment Updates
- Recap & Reflections
- Scope Sharing
- Direct Observation + Exercise
- Breakout Discussion: Direct Observation
- Homework Review & Next Steps

Learning Objectives



Create an opportunity for health center outreach and enrollment (O&E) staff to discuss challenges, strategies related to conducting O&E activities with the health center peers.



Provide in-depth overview of Lean methodology and how to apply it to O&E workflows



Test and implement changes that result in O&E workflow improvements.

Lean Workshop Schedule

Workshop 1 (3/22): Lean Overview & Project Scoping

Workshop 2 (4/5): Direct Observation and Current State Mapping

Workshop 3 (4/19): Waste Identification and Future State Creation

Workshop 4 (5/3): Testing and Watch-it Metrics

Workshop 5 (5/17): Implementation – Documentation, Training & Continuous Improvement

Workshop 6 (6/7): Health Center Project Report Outs + Wrap-Up

Optional Group Coaching Schedule

~~Session 1: Wednesday, March 29th, 2023~~

Session 2: Wednesday, April 12th, 2023

Session 3: Wednesday, April 26th, 2023

Session 4: Wednesday, May 10th, 2023

Session 5: Wednesday, May 24th, 2023

Session 6: Wednesday, May 31st, 2023

Learning Collaborative Faculty



Ted Henson
National Association of
Community Health Centers



Mindy Hangsleben
COO, Varyn Consulting



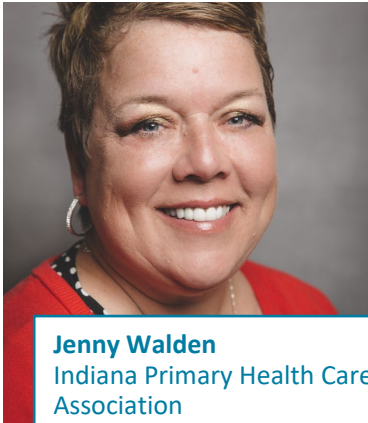
Erin Prendergast
National Association of
Community Health Centers



Paula Campbell
Illinois Primary Health Care
Association



Liz Tansey
Colorado Community Health
Network



Jenny Walden
Indiana Primary Health Care
Association

Outreach & Enrollment: Quick Updates + Pulse Check

April 5, 2023

Outreach & Enrollment Updates

- Primary Care Associations received additional Outreach & Enrollment Funding to Support Health Centers with Medicaid Eligibility Redeterminations
- [Register here](#) for NACHC Listening Sessions on Redeterminations
 - Next Session is April 28th, 2:00 – 3:00 PM ET
- National Press Looking for Families (+ Assisters Supporting Them) Going Through Medicaid Redeterminations
 - Email Ted Henson thenson@nachc.com with potential leads.
- HRSA is Looking for Outreach & Enrollment Stories

Submit Outreach and Enrollment Stories

HRSA is looking for stories on community outreach, specifically:

- A particularly innovative idea
- An impressive success metric

Include in your submission:

1. Health Center and Point of Contact
2. Description of target population, service area, and data showing the scope of need AND innovative approaches to O&E
3. Links to any related news stories that have appeared in local media
4. Email: healthcenterstories@hrsa.gov

Health Center Stories

HRSA-funded health centers across the nation have distinguished themselves in promoting public health and providing primary care services in underserved areas. The examples below provide a snapshot of the exemplary work health centers have carried out across the country.

Interested in sharing your health center's story? Email [HRSA Health Center Stories](mailto:hrsa.healthcenterstories@hhs.gov) for possible promotion on this website, in a HRSA newsletter, or on HRSA social media. If sharing a photo, please include a high-resolution image and a [HRSA Photo Release Form](#) (PDF - 273 KB) or a [HRSA Spanish Photo Release Form](#) (PDF - 558 KB) for each person featured.

Feature Story: Big Boost for Children's Mental Health

A new center for children is expanding services in Flint, Michigan. Genesee Health System offers specialized services for children with autism and mental health care at the site. Read more in [Mental Health](#).



<https://bphc.hrsa.gov/technical-assistance/health-center-stories>

What is the current demand for services and support at your health center from beneficiaries seeking support with their Medicaid eligibility redeterminations?

- No Demand
- Low Demand
- Increased Demand
- Significant Demand

How concerned are you that your health center's patients will lose access to Medicaid coverage and not have access to other forms of coverage (i.e. Medicare, Marketplace, employer-sponsored care, etc.)

- Not Concerned
- Minimally Concerned
- Very Concerned
- Extremely Concerned

Has your health center begun to see patients cancelling visits or not coming in for care?

- Yes
- No
- Unsure

Applying Lean Process Improvement to Outreach & Enrollment Workflows

Reflections

What did you learn about Lean from our last workshop?
Did anything surprise you?

O & E Lean Project Lifecycle (PDSA)



Plan

- **Identify scope, team members, customers, ideal state, and observations**
- Direct Observation “Go and See”
- Current State Mapping
- Waste Identification
- Future State Mapping (w/Ideal State in mind)
- Implementation Planning
- Supervisor/Manager Map Walk

Do

- Documenting, Testing, and Training

Study

- Monitor Watch-It Indicators

Act

- Adjust/Continuous Improvement – Project Report Out

Value Stream Name: Behavioral Health Pre-Visit Planning



Why is this process being selected (improvement opportunity)? provide better streamlined patient care, more planning to make a smoother visit, currently no clear process/standard in place, not sure what information is useful to Psych provider

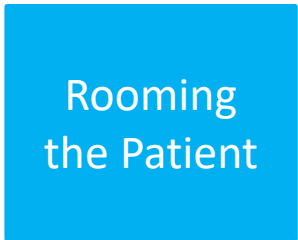
List the one connection you will focus on (green sticky):

Psych
Medical
Assistant

Process Scope (use Blue Stickies to map out the overall flow) focusing on **one** Connection



Out of Scope (include items out of your control, etc.)



Value Stream Name: Behavioral Health Pre-Visit Planning



Team Leader: Kyla

Team Members: Kyla, Cindy

Manager: Young/Psych Providers

Customers (Ultimate and Transactional):

Patient, Provider, MA's, Interpreters, Case Managers

Ideal State Attributes (in a perfect world, what would the customer value?) Everything needed by the provider for the visit is ready when they need to prepare for 100% of patient visits, no unnecessary information, all providers using the same process so it provides a consistent satisfactory patient visit.

Direct Observation Plan (think of variation; person to person, program to program, etc):

List out who/what and due date for observation

Who	What Observation	Due Date
Kyla	New and Returning Patient	8/25
Kyla	New Patient – Recently discharged from hospital	8/25
Cindy	New and Returning Patient	8/27

Breakout Activity - Scope Sharing

Breakout Room Assignments

Group 1: Liz Tansey

CA, CO, ID, NE, NM,
OR, IA

Group 2: Paula

Campbell

IL, MI, MN, MO, OH

Group 3: Erin

Prendergast

FL, NC, SC, TN, TX, VA,
WV

Group 4: Jenny Walden

IN, MA, MD, ME, NY, PA

Direct Observation & Current State Mapping



O & E Lean Project Lifecycle (PDSA)



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Direct Observation

Understand the Current Reality of the Process



Who/What to observe

Where is there variation in the process

- Person to Person
- Program to Program
- Site to Site
- Seasoned vs. New employee

Select 2-3 variations and build that into your plan for observation

Don't Over Observe



Types of Direct Observation

- Observation: Watching as it happens
- Simulation: Role-playing or using data to identify tasks and timing
- Perception: Listing tasks from memory

↑ Accuracy

From	Subject	Received
Hangsleben, ...	RE: time to meet to discuss JIRA strategy/next steps	Thu 8/22/2013 6:51 PM
Hangsleben, ...	RE: time to meet to discuss JIRA strategy/next steps	Thu 8/22/2013 6:51 PM
Heidi Bossley	Re: time to meet to discuss JIRA strategy/next steps	Thu 8/22/2013 12:36 PM
Hangsleben, ...	Re: time to meet to discuss JIRA strategy/next steps	Thu 8/22/2013 11:29 AM
Skapik, Julia (...)	RE: time to meet to discuss JIRA strategy/next steps	Thu 8/22/2013 10:02 AM
Hangsleben, ...	RE: time to meet to discuss JIRA strategy/next steps	Wed 8/21/2013 9:33 PM
Hangsleben, ...	RE: time to meet to discuss JIRA strategy/next steps	Wed 8/21/2013 9:33 PM
Skapik, Julia (...)	RE: time to meet to discuss JIRA strategy/next steps	Wed 8/21/2013 2:36 PM
Heidi Bossley	Re: time to meet to discuss JIRA strategy/next steps	Wed 8/21/2013 2:31 PM
Heidi Bossley	Re: time to meet to discuss JIRA strategy/next steps	Tue 8/20/2013 2:52 PM
Skapik, Julia (...)	RE: time to meet to discuss JIRA strategy/next steps	Tue 8/20/2013 2:21 PM
Heidi Bossley	Re: time to meet to discuss JIRA strategy/next steps	Mon 8/19/2013 6:03 PM
Hangsleben, ...	RE: time to meet to discuss JIRA strategy/next steps	Mon 8/19/2013 5:51 PM
Hangsleben, ...	RE: time to meet to discuss JIRA strategy/next steps	Mon 8/19/2013 5:51 PM
Heidi Bossley	time to meet to discuss JIRA strategy/next steps	Mon 8/19/2013 11:31 AM

Direct Observation



- Listen with your eyes
- Observe the current reality – this is not an audit
- Write down everything you see...and jot down how long it takes
- Stay out of solution space
- Only ask questions about the process not the why's (these will come later 😊)

Direct Observation Template

DIRECT OBSERVATION WORKSHEET		Page	of
PROCESS OBSERVED:		OBSERVER:	
START POINT:		OBSERVATION DATE:	
END POINT:		TOTAL CYCLE TIME:	
Step #	Step Description	Start Time	End Time

Direct Observation Exercise



Eight Types of Waste



Transportation

Unnecessary movement of people or parts between processes



Inventory

Available resources or tools that are not being utilized



Motion

Unnecessary movement within a process



Waiting

Waiting for work cycle to be completed



Over Processing

Processing beyond standard requirements



Overproduction

Sooner, faster, or greater quantities than demand



Defects

Repetition or correction of a process done incorrectly



Variation

Undesired difference between products

TIMWOOD+V

Ask: Does this add value from the customer's perspective?

Breakout Activity Direct Observation Reflections

What did you notice during the observation?

What waste did you see?

What are some wastes you think you will see in the process you selected?

Breakout Room Assignments

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CA, CO, ID, NE, NM,
OR, IA

Group 2: Paula

Campbell

IL, MI, MN, MO, OH

Group 3: Erin

Prendergast

FL, NC, SC, TN, TX, VA,
WV

Group 4: Jenny Walden

IN, MA, MD, ME, NY, PA

Current State Mapping

Goal: Visually understand what is happening today

Include:

- Types of activities performed
- Order of activities
- Who is doing the activity
- Decision points and how they change flows
- Wait time – Include approximate time on the purple post-it
- Work Time – Include approximate time on the blue (flow step) post-it

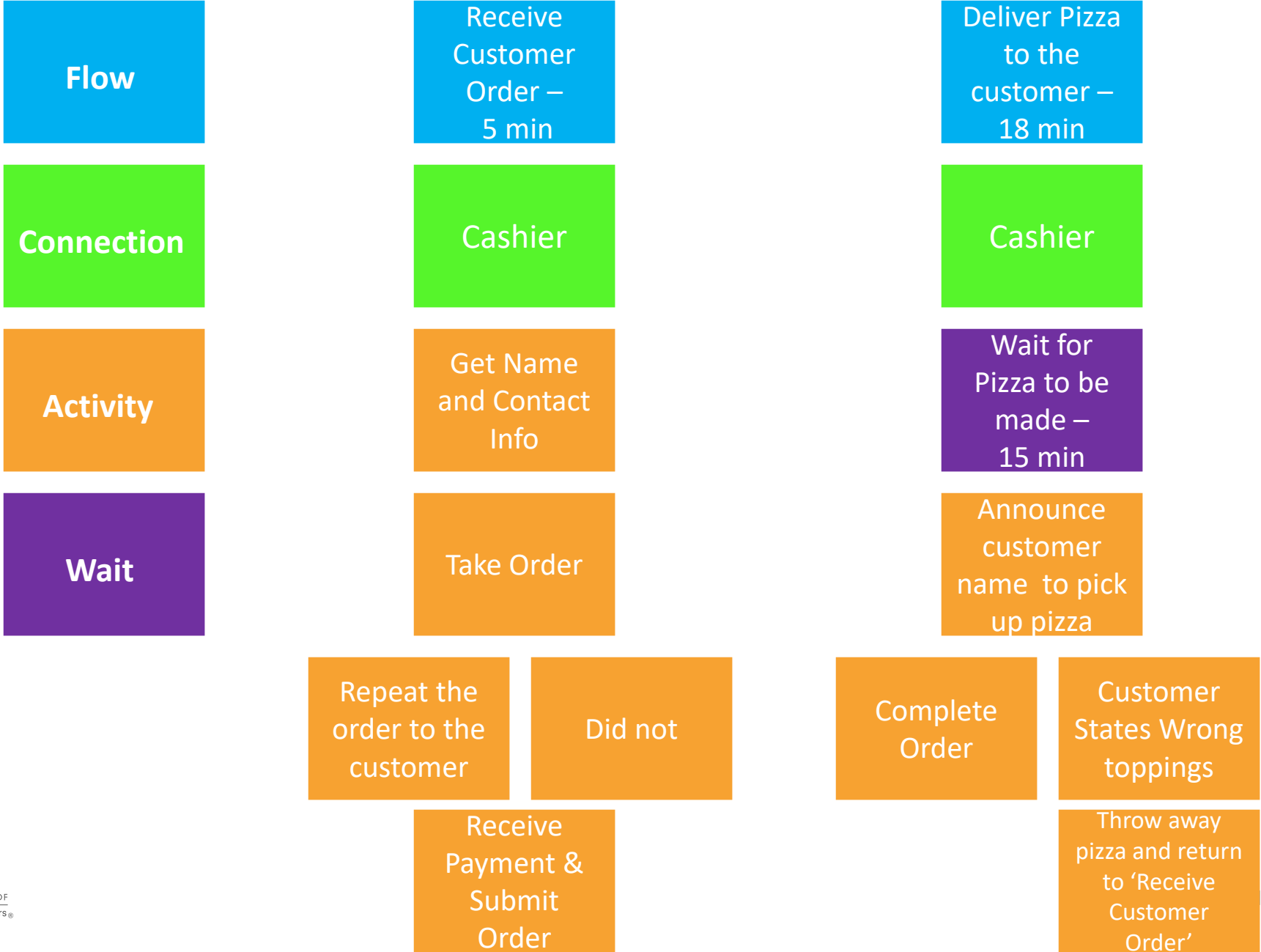
Process Mapping

- Visual Representation of the current reality
- Provides an objective look at the process
- Flows left to right –
Tops Down Process Mapping
- Uses standard colors

Flows	What are the different high level steps in the process?
Connection	Who is doing the work?
Activities	What tasks happens during this part of the flow?
Wait	Anytime you have wait time

*Colors denote the color of post-it you will use to show the above in your process map

Current State Example – Pizza Making



Parking Lot Usage

- Capture ideas for the Future State
- Note questions or discussion items for the manager
- List items outside of your scope or control
- If you hear the word “should” the item likely belongs on the parking lot for Future State mapping



Assignment: Direct Observation & Current State Mapping

- Perform Observations – the observation worksheet is located on the Learning Hub
- Create a Current State Map – the Excel Mapping template is in the Learning Hub
- Upload to Learning Hub



Next Steps

- April 12: Optional Group Coaching Session
- Complete Homework 2 Assignment
- Log into Learning Hub and Upload Homework

Comments/Questions?

Contact Ted Henson thenson@nachc.com or Mindy Hangsleben mindy@varynsconsulting.com

THANK YOU!



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PLEASE VISIT US ONLINE

[nachc.org](https://www.nachc.org)