PRODUCTIVITY:

A Function of Efficiency and Organization in Service Delivery

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Discussion Outline

- Service Provision Process in a Systems Context

- Productivity as a Process

- Premises/Stages in the Service Provision Process

- 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 access services….
  - SAM, Inc. must continue to become more efficient/organized, so that…
    - SAM, Inc. can remain fiscally viable, so that…
    - SAM, Inc. can continue to provide services.

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SERVICE PROVISION PROCESS in a SYSTEMS CONTEXT

Implications of SAM's Status as a Not-for-Profit Agency:
- There are limits regarding the use of funds/revenue

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As a Process

- Productivity is <u>not</u> primarily a fiscal function.

- Rather, productivity naturally results from:
    - Adherence to high standards of 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.

PRODUCTIVITY

" Maximizing Your Day"

- Organization

  - Awareness of units available in work day
  - Things to do list
  - Schedule/Calendar
  - Consider proximity when scheduling appointments
  - Activity Log Implementation/Process

PRODUCTIVITY

" Maximizing Your Day"

- Efficiency

    - Schedule case management functions back to back
    - Complete full unit(s) of service
    - Productive work day
    - Minimizing "Down time"

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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;

- Ensuring follow-up activities are completed timely

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" Maximizing Your Day"

Examples include, but are not limited to:

• 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.

•Reviewing pertinent information (i.e.: incidents, previous service notes) prior to contacts to ensure productive contact.

File   Edit   View   Go   Tools   Actions   Help

Type a question for help

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

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

* 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 expain 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   * All Staff Meetings   * Non-billable E-mail,

* On-line trainings   * Outside Trainings   * Peer Mentoring/Shadowing/New Staff   Timesheet & Travel,

* CARF Trainings   * Union Meetings   * Supervision time separate from file review   Outlook Calendar
                                                     (captured in columns 6 or 7)

(11)   NON-PRODUCTIVE ACTIVITY
*   Breaks   Please expain 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 *(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)	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	

BILLING UNITS

OVER/(UNDER) UNITS   0

PRODUCTIVITY

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 SAM Fiscal Department.

• Direct service staff provide services according to the highest/most effective standards of practice and SAM'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 in terms of errors, DAP format, etc.

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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.

- **SAM Fiscal Department**

- **SAM IT Department**

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Premises/Stages in Service Provision

SAM 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.

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
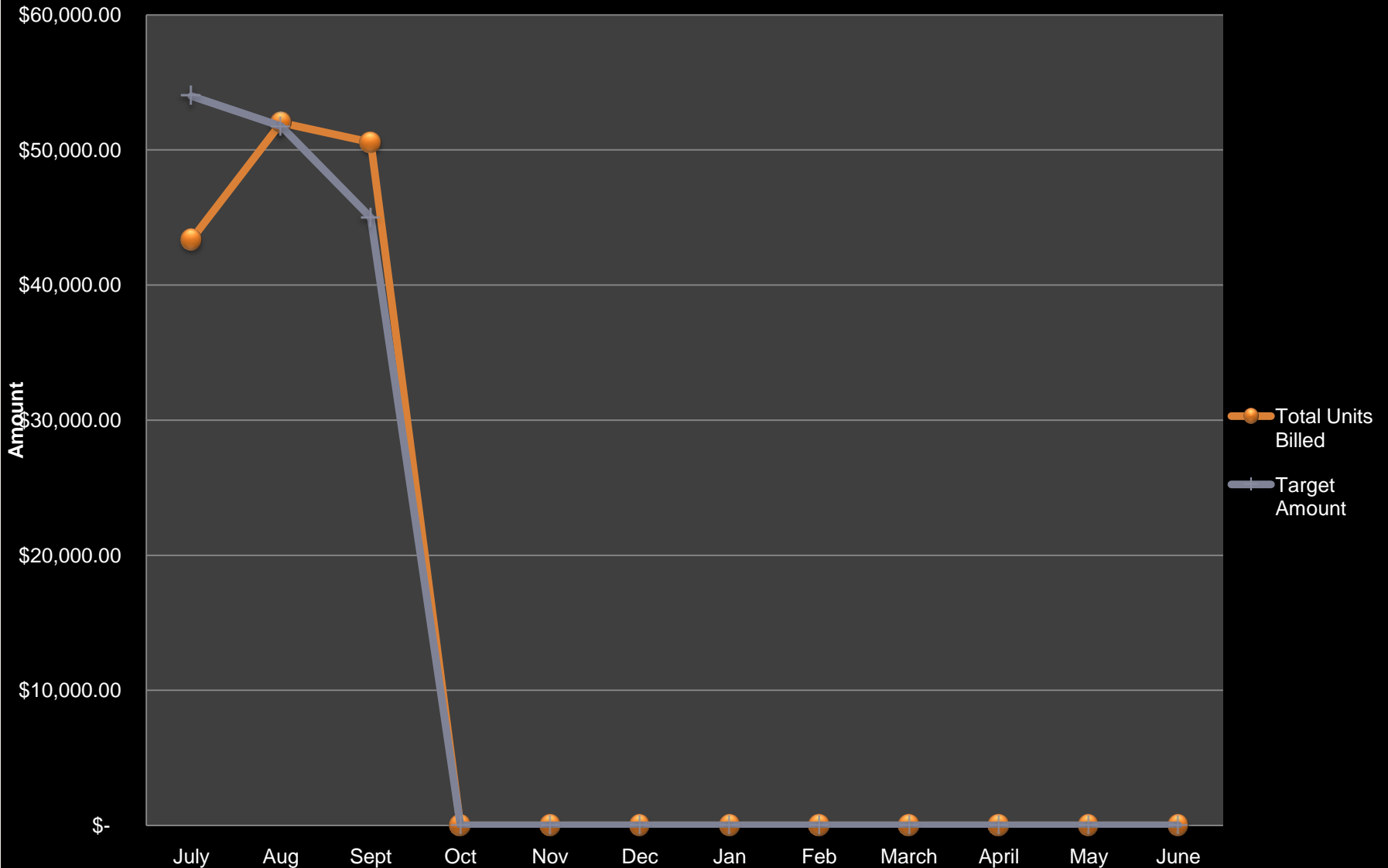
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Premises/Stages in Service Provision

SAM IT department supports case management services by:

- • Managing data/records related to consumer information, provision of services, billable activities, etc.
  - • Mobility
    - •Laptops
    - •Cell Phones

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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.

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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

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