



Charlie

for Refills

Case Study

St. Joseph Health 
St. Joseph Heritage Healthcare

Reducing Physician “Pajama Time” & Closing Gaps in Care Through Medication Refill Technology

About St. Joseph Heritage Healthcare

St. Joseph Heritage Healthcare (Heritage) was founded in 1994 and is part of Providence St. Joseph Health. In addition to its eight medical groups throughout California, Heritage supports six distinct affiliated physician networks throughout the state. Combined, they provide residents access to more than 2,000 providers in virtually every specialty. Heritage medical groups and affiliated physicians have received top honors from various organizations, including the Orange County Medical Association for Physicians of Excellence and the Integrated Healthcare Association with distinction in clinical quality. There are 915 total medical group physicians, of which 153 are supported by 25 refill technicians. The team routinely processes 37,000 medication refill requests per month in Allscripts TouchWorks® EHR.

Challenge

One of the goals of the Heritage Contact Center is to offload tasks from the clinics so that staff can operate at the top of their license and focus on the patients in front of them. Leadership at St. Joseph Heritage Healthcare asked the Heritage Contact Center to extend its medication refill processing services to a broader group of physicians in multiple regions and specialties. Additionally, the team was tasked with providing more detailed reporting and analytics to quantify the Center’s activities. The end goal was to centralize the refill service and to delegate routine, repeatable tasks to non-clinical technicians. However, the Heritage team did not have additional funds to hire new FTEs. To accomplish the goal, the team sought a technology solution that would enable existing staff to be more efficient and increase capacity.

Solution

In August 2017, Heritage turned to healthfinch and implemented its Charlie Practice Automation Platform. healthfinch is a certified partner in the Allscripts Developer Program and Charlie’s Refill Management application is pre-integrated with TouchWorks. This enabled implementation of the platform to be completed in just 12 weeks, ultimately supporting 200 primary care physicians.

In addition to the technical implementation, the rollout included organizational process and staffing changes. According to Renee Voll, Executive Director of Patient Experience and Contact Center at Heritage, “To fully operationalize a centralized refill service, it was imperative that we adopt a standardized set

Results at a glance

- Over 65% of refills are now processed by non-clinical technicians
- Efficiency of technicians has increased threefold, processing 200 refills per FTE per 8-hour shift
- Able to effectively close gaps in care coming due within 90 days



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of refill protocols for all primary care physicians to follow. Through a consensus process with clinical leadership, our medical director ultimately signed off on the set of protocols now followed across the organization.” To support this process, the healthfinch customer success team provided guidance and identified opportunities for approving an even greater number of refills on behalf of the medical staff.

With standardized protocols for office visits and labs in place, Heritage began delegating routine refill tasks to non-clinical technicians. Requests originating from Surescripts, FollowMyHealth, and incoming faxes appear as Rx Renewal tasks in physicians’ task buckets that technicians continuously monitor. Charlie presents relevant information in the tasks such as last appointment with the managing provider, appropriate refill amount, last time the medication was ordered, and associated labs required for the medication. Charlie also flags out-of-range values, when the next office visit and labs are due, and the status of the medication. Previously, these items were all manually reviewed. With Charlie, the staff no longer needs to scour patient charts, effectively automating the chart review process.

Each request is categorized as In Protocol, Duplicate, Out of Protocol, or Controlled. Based on the pre-populated information, technicians can easily act on In Protocol requests and delete Duplicates. Providers are only involved with Out of Protocol or Controlled requests.

Results

“Today, over 65% of all refill requests are processed by non-clinical refill technicians, up from 50% before using Charlie. Technicians have increased their efficiency threefold, now processing upwards of 200 refills per eight-hour shift. This greatly reduces the burden on our providers at the end of the day and evening hours,” states Voll. An additional benefit has been the increase in patient satisfaction. Previously, turnaround time for refill requests could have taken upwards of 72 hours. Now, requests can be completed in as quickly as 12 hours.

Charlie also enables technicians to take a more proactive role in closing care gaps associated with medication refills. When a refill request is being processed, staff members holistically review each patient’s full medication list, identifying labs, visits and procedures that need to be completed in the next 90 days. Outstanding items are then scheduled with the patient. With care gaps addressed, upcoming refill requests to be categorized as In Protocol and processed immediately.

Physician satisfaction has also increased on multiple fronts. Because Charlie’s Refill Management application helps staff identify missing visits, physicians are now seeing patients more frequently as opposed to simply auto-renewing prescriptions, as had been done in the past. Additionally, incoming refill tasks received over the weekend no longer loom for physicians to process during off hours. Those requests are picked up and moved out of the physicians’ buckets for the Heritage team to process on Monday mornings.

Growth with healthfinch

After hearing about the success using Charlie’s Refill Management application, several additional groups across Heritage are now seeking support from the Contact Center. According to Voll, “We are in discussions with our Northern California primary care leadership team and St. Jude endocrinology physicians, all of which can be supported by healthfinch protocols, without adding additional FTEs.”