Example of PHRED Usage at Kaiser Permanente
Presented by:

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Problem Definition

- How to handle highly valued, infrequent, low-resource utilization patients
Issues Involved

- Fear of change
- Lack of communication
- Hierarchy
  - The need to maintain supervisors power base
- Distrust of management initiatives by staff
- Highly variable nature of problem
- Mechanics of how to do this
Conventional Option Available to Solve Problem

- Issue an administrative objective
  - Hasn’t worked in the past
  - Disempowering
- Bring in consultants (McKinsey)
  - Far too costly
  - Perceived as much of a disempowering external solution as a management edict
How do we overcome these problems using PHRED?
Theoretical Basis of this Tool

- Quality movement
  - Demming’s, “No one goes to work to do a bad job” presupposition
- Gestalt, positive intention
- Rational Emotive, question strings
- Reinforcement of cooperative behavior
The Tool Needed to...

- Diagnose problem
- Understand the interests of the parties involved
- Establish a consensus
- Understand boundary conditions
- Agree evidence and success criteria
- Agree action plan
  - With delineated dates, roles and responsibilities
- Put action plan into effect
Steps the Team went through to Achieve Results

- Team created a positively framed objective statement
  - The objective was broken down into effected areas
  - The team defined what it had to do and what others had to do in each of the effected areas
  - The achievements and impacts in each area the fast track system effected
  - Where to see the results, both tangible and intangible locations
  - How they wanted fast track to operate in terms of style, conditions for achievement and qualities
  - Time scales and milestones for the objective
Steps the Team went through to Achieve Results

- Specific evidence criteria indicating success or failure for the fast track
- Is fast track achievable given the above?
- What are the problems fast track will create?
- What will have to be given up?
- Created a list of the steps and tasks
- Recorded when tasks are due and any comments
Results

- The team overcame many of the disputes that had previously halted more progress
- The consensus plan was produced and adhered to
  - Without management directives
History

- First training steps initiated 10/19/1994
- Lower acuity inclusion/exclusion criteria produced and agreed 11/14/1994
- Pilots completed and assessed
- Final consensus “Fast Track” system implemented 12/14/1994
- Fast Track simultaneously arrives, June 1995
Why was this successful?

- PHRED overcame the distrust of directives by being regarded as an independent broker
- Consensual decision making, all parties felt that their points of view were included and validated
- Facilitated an understanding and acceptance of the validity and necessity of other points of view
- PHRED enabled empowered involvement of everyone
Benefits

- We introduced an example of change happening successfully from within
- We have a specific methodology for an empowered team which all validated
- The non-managerial staff felt empowered and experienced the results of that empowerment in practice
Objective Example

- The following is a demonstration of the PHRED system at Kaiser Permanente
- Representatives from all facets of the Emergency Care Center participated
  - Via a single LCD projection panel
- The data you are about to see includes quite a lot of industry specific jargon, but you can use PHRED in the same way
Design: Objective

What do you want to accomplish?

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Assigned by the committee

Focus on what you want, not on what you do not want or want to avoid.
Enter only one objective.

Entering multiple objectives at the same time will make it more difficult to define and achieve.

Is this stated in the positive?

☐ Yes
☐ No

A positive objective refers to what you want to achieve rather than what you want to avoid.

A negatively focused objective refers to not doing something, avoiding, eliminating or moving away from a condition.
Systemic Effects

- On the next screen, the effected areas are entered.
- These areas will be considered throughout the objective to insure their perspectives and concerns are included.
  - Thinking outside the box
- Groups must determine how their objectives effect the whole.
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Objective

Who is involved in or affected by the objective?

- Your Team
- Your Unit
- Department
- Organization
- Customers
- Others

John Farnin, MD, PIC/RDC, Marte Meyer, MBA, MCD

Please enter unit name.

ECC Fast-track working group

Please enter department name

Emergency Care Center

Please enter organization name.

Kaiser Permanente

Please enter applicable name(s).

Kaiser Permanente Members

Please enter applicable name(s).

Community Partners
Achievability

What can you do to achieve this objective?

**Your team** - John Farrin, MD, PIC/RDC; Marte Meyer, MBA, MCD

- Lead group in problem recognition
- Provide resources for staff to achieve goal
- In-service staff team on PHRED use

**Your Unit** - ECC Fast-track working group
- Work together as a team to create plan
- Identify and efficiently use ECC resources
  - Staff
  - Space
- Agree on where and who does work

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What resources do you have that will enable you to achieve your objective?

- Rapid first contact RN triage system
- Adjacent "Caritas Clinic" space
  - Rooms 7 & 10
- Triage booths
- Strong and professional staff
  - RNs & EDTs
  - Physicians & PA-Cs
- Team dedicated to solving this problem
- 9pm PA-C
- Franklin UCC doc at 11 pm

List your strengths, skills, people that could help, and other resources.

For example:
- Money
- Equipment
- Co-workers
- Commitment
- People skills

Depth Question area
Depth Questions

- Depth Questions help the user go into more depth with the main question
- Can be edited to reflect known areas of organization weakness
- Each screen can have an unlimited number of depth questions
- Can be modified via the PHRED Editor
Specifics

- The next five screens determine the scope of the objective
  - What is wanted
  - Where is it
  - Who is involved
  - When
  - How
- The systemic effects are automatically entered
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Specifics

What do you hope to obtain if you achieve your objective?

- For your team: Establish a successful TQM project pattern
- For organization: Better service reputation
- For members: Better service
- For others: Competitive Community performance standard

Entered by the user

Entered automatically by PHRED

For each of the groups listed, answer the following question. For each objective was obtained, what would you like to explore this further, answer the next four depth questions.
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Where do you want to see the results?

- For yourself: On day sheet reports (fast-track on/off PRN)
- On patient satisfaction surveys
- For your team - Shorter wait times
  Less complaints
  Better attitude towards team projects
- For organization - Better facility satisfaction survey scores
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**With whom do you want to be involved in the objective?**

**For your team - Representatives of ECC staff & Admin**
- For your unit - comprehensive representation of groups
- All groups - Providers, Nursing, Lab, XR, Ancillary, Pharmacy
- Ted Dickson
- Marsha Rabold
- For the organization - Administration for

*Entered by the user*

For each of these categories, who is involved with or impacted by this objective?

If known, enter names and titles.

You will be assigning who is responsible, accountable, consulted, and informed after you have completed defining the objective.
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How do you want it?

- For yourself - Written evidence of process
- For your team - Recognition of success
  - Led by team leader and physician
    - "captain"
- For organization - Reflection in organizational Surveys
- For members - Friendlier feel to ECC so

How do you want it to happen?

List qualities:
- Descriptions
- Conditions for achievement
- Styles
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What are your timescales?

For yourself - In motion with trainings in early November
   Implemented before winter crunch (mid-December)
For your team - Planning done by mid-November
   Trials before December, consensus by early December

Start with the expected completion date.
Then enter the milestones or deadlines along the way.
Later in the tasks section, you will be assigning due dates for each task and step you develop.
Evidence

What evidence will there be that this objective has been achieved?

For yourself - Faster low acuity turn-around times
   Absence of written wait-time complaints on surveys
   Plan that works - turns on/off PRN 6-12 months from now

For your team - Implement when waiting room is full

For the organization - Higher scores on

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How will you measure it?

What specific evidence will let you know the objective has been successfully completed for each group listed?

What will you
   See
   Hear
   Feel
   that will tell you the objective has been achieved?
Size

Is this a reasonable sized objective?

- about right
- too large
- too small

Selected by the user

What obstacles do I have to overcome in order to achieve this objective?

How does this feel?

Is it achievable given what you now know about this objective?

If the objective is too large, this is your chance to express your views about any obstacles which would need to be overcome.

Note: It is okay to leave fields blank, if you don’t know the answer. It will show what you don’t understand at this point.

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Consequences

- What are the consequences of achieving the objective?
- What are the rules and boundaries?
  - What aren’t you willing to do?
- What could cause the objective to fail?
Consequences

Think of the possible by-products

Are there conditions when achieving this objective would create problems?

For yourself - No
For your team - If sicker members get angry, give explanation
For organization - No
For Members - Complainers might complain

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Are there any conditions when you would NOT want this objective?
Is this objective what you really want? Note any reservations you may have.
If you were offered the completed objective today, would you take it?
Be aware of any "Yes...but" feelings.
Consequences

Think of the possible by-products
What will you have to give up?

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All objectives have a cost.
Think about what you will lose if you achieve your objective.
List those projects or involvements which will be impacted by working towards this objective.

Yourself - John Farrin, MD, PIC/RDC; Marte Meyer, MBA, MCD - Nothing
Consequences

What will others have to give up?

Your Team - Victim behavior
Complaints about lack of control
Free time during peak volume times
An excuse to foot drag

Organization - Delaying service in Medical offices

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In each area below, notice what the group’s perspective might be.

What will they have to give up?
What will they have to start doing?
Can they do it?
Defined Objective

- The objective has been well formed over the last 14 screens
- Responsibilities to be defined
  - Who will play each role(s)?
- Tasks to be defined
  - Specifically what to do
Roles and Responsibilities

- Using data previously entered, drag and drop individuals into their respective roles
- Robert Beckhard’s RACI model is used
  - Responsible, Accountable, Consulted, Informed
Responsibilities

Select those involved.
(double-click and hold to drag.)

- With whom answers
  - Names/Titles database

For your team - Representatives of entire ECC staff & Admin
For your unit - comprehensive reporting groups
All groups - Providers, Nursing, Lab, XR, Ancillary, Pharmacy
Ted Dickson
Marsha Rabold
For the organization - Administration for support & recognition
For members - Utilize member survey data in planning

Dragged from left to right

Accountable
- John Farrin

Responsible
- Providers, Nursing, Lab, XR, Ancillary, Pharmacy
- Marsha Rabold
- Pharmacy
- Ted Dickson

Consulted
- May Veto
- Representatives of entire ECC staff & Admin
- Marsha Rabold
- Pharmacy

Informed
- Cannot Veto
- All groups - Providers, Nursing, Lab, XR, Ancillary, Ted Dickson

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Tasks

- Tasks are the separate actions to be taken
- Recursively defined until specific tasks are developed or you have made a decision that you don’t know what is next
Basic Objective Questions

Tasks

Choose text from this side.
(double-click and hold to drag to task list)

What you can do

What others can do

Your team - John Farrin, MD, PIC/RDC; Marte Meyer, MBA, MCD

Lead group in problem recognition
Provide resources for staff to achieve
In-service staff team on PHRED use
Engage broad participation of all
Call for working group sessions
Follow through with session scheduling
Ensure complete ECC staff representation
Define patient inclusion/exclusion criteria
Carry out any needed trials
Actualize the group’s solution(s)
Test their fast-track system(s)

Enter the steps below.

Is this a task?

1. Lead group in problem recognition
2. Provide resources for staff to achieve goal
3. In-service staff team on PHRED use
4. Define patient inclusion/exclusion criteria

Note: If it is marked as a task, no further definition is required. Steps will be further defined on the next screens.
Tasks
Imagine you have successfully completed the objective.
2 Provide resources for staff to achieve goal

Enter the steps below

1. Review budget
2. Make arrangement for staff planning time

Is this a task?
Entries do not need to be in order.
Double click and hold then drag the icon to the task list.
You may type steps and tasks directly into the list.
Press the down arrow on the task list to create additional tasks

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Entered by the user
Tasks
Imagine you have successfully completed the objective.

2.2 make arrangement for staff planning time

Enter the steps below

1. request staff time for marykaye, joseph and marty

Note: Up to 99 tasks may be created for each individual step.

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Entered by the user

Entries do not need to be in order.

Double click and hold then drag the icon to the task list

You may type steps and tasks directly into the list

Press the down arrow on the task list to create additional tasks

Continue  Back  Exit  Coach  Print  Summary
Task Summary

- Assign responsibilities and Due Dates
  - Either during the meeting or individually via the network
- Printouts available selecting the data according to your criteria
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### Task Summary

#### Enter Task Owners, Due Dates

<table>
<thead>
<tr>
<th>#</th>
<th>Task</th>
<th>Responsible</th>
<th>Due Date</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>□ Lead group in problem recognition</td>
<td>Pharmacy</td>
<td></td>
<td></td>
</tr>
<tr>
<td>2</td>
<td>□ Provide resources for staff to achieve goal</td>
<td>Ted Dickson</td>
<td>1/1/96</td>
<td>C</td>
</tr>
<tr>
<td>2.1T</td>
<td>□ review budget</td>
<td>Marsha Rabold</td>
<td>1/1/96</td>
<td>C</td>
</tr>
<tr>
<td>2.2</td>
<td>□ make arrangement for staff planning time</td>
<td>Marsha Rabold</td>
<td></td>
<td></td>
</tr>
<tr>
<td>2.2.1T</td>
<td>□ request staff time for marykaye, joseph and</td>
<td>Pharmacy</td>
<td></td>
<td></td>
</tr>
<tr>
<td>3</td>
<td>□ In-service staff team on PHRED use</td>
<td>Ted Dickson</td>
<td></td>
<td></td>
</tr>
<tr>
<td>3.1T</td>
<td>□ Schedule conference room</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>3.2</td>
<td>□ Determine 2 staff training windows</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>3.2.1T</td>
<td>□ Review availability with key team members</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>3.3T</td>
<td>□ Arrange PHRED trainers time</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>4</td>
<td>□ Define patient inclusion/exclusion criteria</td>
<td>John Farin</td>
<td></td>
<td>O</td>
</tr>
<tr>
<td>4.1T</td>
<td>□ research historical database</td>
<td>Joseph O'Connor</td>
<td></td>
<td>O</td>
</tr>
</tbody>
</table>

Responsible, Due Date and Status entered by the user

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### User Interface Buttons

- Continue
- Back
- Exit
- Coach
- Print
The Objective is Completed

- Exit or select another objective to create or update
- The Coach (Help facility) and Depth Questions (hints on the side of the screen) may be modified with the PHRED Editor to better reflect the usage environment
For further information contact:

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