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Board on Health Care Services — Health and Medicine Division
Computer Science and Telecommunications Board — Division on Engineering and Physical Sciences

Workshop on Key Operational Characteristics and Functionalities of a State-of-the-Art Patient Scheduling System

Keck Center of the National Academies
E Street Conference Room
500 Fifth Street NW
Washington, DC 20001

AGENDA

Thursday, May 16, 2019	
7:30 am	**Registration**
8:00 am	**Welcome and Workshop Overview** Kenneth W. Kizer, MD, MPH, UC Davis Health, *Chair*

8:15 am	**Session 1: Background and Scene Setting**
	
	• Context for Implementing a New VA Patient Scheduling System
	  ○ Steve Lieberman, MD, MBA, FACHE, FACP, Veterans Health Administration
	
	• Overview of *Transforming Health Care Scheduling and Access: Getting to Now* (IOM, 2015)
	  ○ Mark Murray, MD, PhD, Mark Murray & Associates, LLC (*remotely*)
	
	• VA Perspective on the Veteran's Health Context and Special Requirements
	  ○ Carolyn Clancy, MD, Veterans Health Administration
	
	• Cerner's Perspective on Scheduling
	  ○ Chad Ruoff, Vice President, Cerner Government Services

10:15 am	**Break**
10:30 am	**Session 2: Experiences of Other Institutions in Creating & Deploying Patient Scheduling Systems** • How have other institutions met the functional and technical requirements for scheduling systems across a range of patient types and care settings including rural & urban systems and primary & specialty care? • What conceptual models and implementation technologies have been used effectively? • What are commonalities and differences from the VA context? • How is the success of these systems measured and evaluated? • What are the unique considerations for primary care vs specialty care? • How does one maximize continuity of care along with timeliness? Moderator: Eva Lee, PhD, Georgia Institute of Technology Panelists: • Don Goldmann, Chief Scientific Officer Emeritus, IHI • Chunhua Weng, PhD, FACMI, Columbia University

	• Michele Samorani, PhD, Santa Clara University • William Hu, MD, PhD, FAAN, Emory University School of Medicine (*remotely*) • Seth Carlson, MSIS, National Institutes of Health **Panel Discussion**
12:30 pm	**Lunch**
1:30 pm	**Session 3: Perspectives and Experience of Patients, Schedulers, and Clinicians** • How does one effectively serve a geographically diverse population with varying capabilities and access to technology? • How can technologies such as online scheduling, mobile apps, and text messaging be used to enhance the user experience and reduce the no-show rates? • How can one best serve a population with varying interest or ability to use these technologies? • How does one most effectively span care provided by the VA and in the community? Moderator: Susan Kirsh, MD, MPH, Department of Veterans Affairs Panelists: • Adrian M. Atizado, Disabled American Veterans • Mia Powers-Higgins, Office of Veterans Access to Care • Leonie Heyworth, MD, Office of Connected Care/Telehealth • Desiree Hill, HSS, Department of Veterans Affairs • Clifford Smith, MD, Department of Veterans Affairs • Lisa Arfons, MD, Office of Veteran Access to Care • David Au, MD, HSR&D Center of Innovation for Veteran-Centered and Value-Driven Care, VA Puget Sound Health Care System • M. Christopher Saslo, DNS, APRN-BC, FAANP, Department of Veterans Affairs **Panel Discussion**
3:30 pm	**Break**
3:45 pm	**Session 4: Interoperability and Integration** • How does integrated scheduling create value for the veteran? • How does scheduling across different specialties, across different settings of care, and even across different organizations improve veteran health? • What integration is needed between the scheduling system and other enterprise IT systems within an organization? • What standards and core functions are needed to achieve the necessary interoperability, such as with 3rd party community care systems? • What information can be/should be exchanged to optimize the value of scheduled appointments for veterans? Is the CCDA sufficient? • Are there novel data elements that can be leveraged to improve the timeliness/reliability of care for veterans through automation (eg ADT data for FU post-discharge care)?

	• What are the challenges of integrating novel modalities of care (telehealth, group visits, online groups, etc) with traditional face-to-face visit care? • How much flexibility is required, and how does one best achieve it? Moderator: Joe Kimura, MD, MPH, Atrius Health Panelists: • Christopher (Cris) Ross, Mayo Clinic (*remotely*) • Sagnik Bhattacharya, PatientPing • Isaac Vetter, Epic • Robert Cothren, PhD, California Association of Health Information Exchanges **Panel Discussion**
5:45 pm	**Adjourn Day 1**
Friday, May 17, 2019	
7:30 am	**Registration**
8:00 am	**Session 5: Key Requirements and their Phasing** • What are the primary goals for a patient scheduling system, and what are the associated key requirements? • What functionality is essential to deliver in an initial version of a scheduling system? What capabilities can be deferred to later versions? • How can new capabilities most effectively be piloted and assessed? • How does one most effectively make the transition from current systems to a new one? Moderator: Rachel Weber, MSIE, HealthcareIE LLC Panelists: • Eva Lee, PhD, Georgia Institute of Technology • Desiree Hill, HSS, Department of Veterans Affairs • Jane Fogg, MD, MPH, Atrius Health • Kellianne Thayer, Atrius Health • Sean Bina, Epic **Panel Discussion**
10:00 am	**Break**
10:15 am	**Session 6: Emerging Technologies and Practices** • What are emerging best practices in patient scheduling? • What emerging technologies could be harnessed to improve scheduling and the patient experience? • What flexibility is needed to allow the introduction of new approaches and technologies over time?

	• What are emerging standards and frameworks for scheduling? • What are possible future states for the VA patient scheduling system? • How does one ensure that new technologies will enhance system effectiveness? Moderator: John Halamka, MD, Harvard Medical School Panelists: • Graham Gardner, MD, MBA, Kyruus • Adeel Yang, MD, Medumo, Inc. • Oliver Kharraz, MD, Zocdoc • Spencer Cross, Change Healthcare **Panel Discussion**
12:15 am	**Lunch**
1:15 pm	**Session 7: Wrap-up Discussion -- Operational Characteristics and Functionalities of a State-of-the Art Patient Scheduling System for the VA** • What are the state-of-the-art scheduling models for primary and specialty care? • What technical standards and foundations are needed? • What do the VA and other systems have in common with respect to patient scheduling? What if any are important distinctions? • Can we develop "10 commandments" that can be the guiding principles to keep in mind as this develops/rolls out? Moderator: Kenneth W. Kizer, MD, MPH, UC Davis Health Panelists: • Eva Lee, PhD, Georgia Institute of Technology • Susan Kirsh, MD, MPH, Department of Veterans Affairs • Joe Kimura, MD, MPH, Atrius Health • Rachel Weber, MSIE, HealthcareIE LLC • John Halamka, MD, Harvard Medical School **Panel Discussion**
3:15 pm	**Adjourn**