Imaging Scheduling

Patient MyJMH

System Journey

The steps a user goes through to complete a task using the system.

I want to schedule multiple imaging exams. How can I do it efficiently? —*Mary*

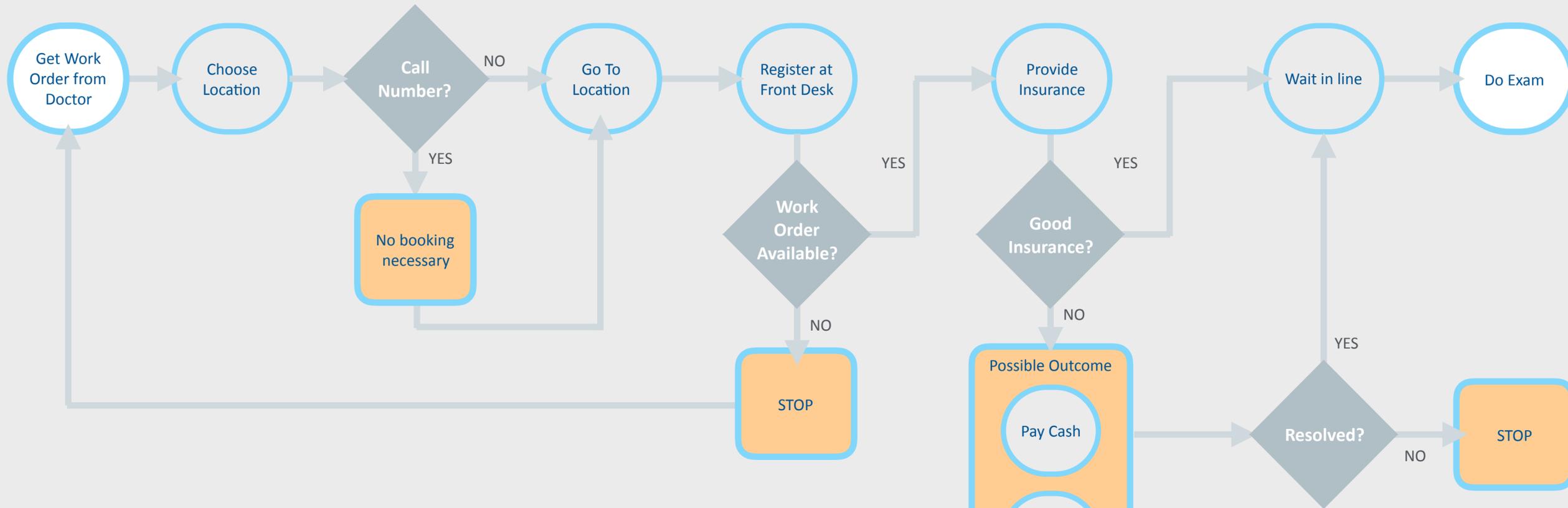Daniela Penati & Rian Smith

STORY 1 | Schedule an X-Ray

As a **patient of John Muir Health** with a **myJMH Account** I want to be able to **schedule an X-Ray appointment** for the day/time most convenient to me, so that **I don't have to wait** when I go there.

SYSTEM CRITERIA:

- Enable Ticket Scheduling for **X-Ray**, on the myJMH patient portal. [NEW Feature - Ticket Scheduling]

- Show open days and times.

- Show list of available locations.

- Perform eligibility check of insurance [Opt. Additional New Feature - Real Time Eligibility]

STORY 1 | Schedule an X-Ray > Human Interaction

```
Get Work Order from Doctor → Choose Location → [Call Number?]
    [Call Number?] --NO--> Go To Location
    [Call Number?] --YES--> No booking necessary → (back to Go To Location)
Go To Location → Register at Front Desk → [Work Order Available?]
    [Work Order Available?] --YES--> Provide Insurance
    [Work Order Available?] --NO--> STOP
Provide Insurance → [Good Insurance?]
    [Good Insurance?] --YES--> Wait in line
    [Good Insurance?] --NO--> Possible Outcome (Pay Cash / Contact Insurance) → [Resolved?]
    [Resolved?] --YES--> Wait in line
    [Resolved?] --NO--> STOP
Wait in line → Do Exam
```

A work-order is required for a patient to get x-rays.

Work orders are usually given to patients in paper-format.

A printed order is easy to misplace.

When Mary calls the Facility to schedule the apppointment, she is told that appointments are not scheduled in advance and she just have to walk-in.

A wasted phone call.

No way of knowing how long the test will take to complete.

The facility doesn't schedule appointments over the phone.

Staff doesn't know how busy they are **nor** who's walking in each day.

When Mary arrives at the facility, she has to provide a copy of the Work Order, or its Reference Number, so that the staff can find the order in the system.

If Mary forgets to bring the Work Order, and the staff can not find a copy in the system, she will have to walk away.
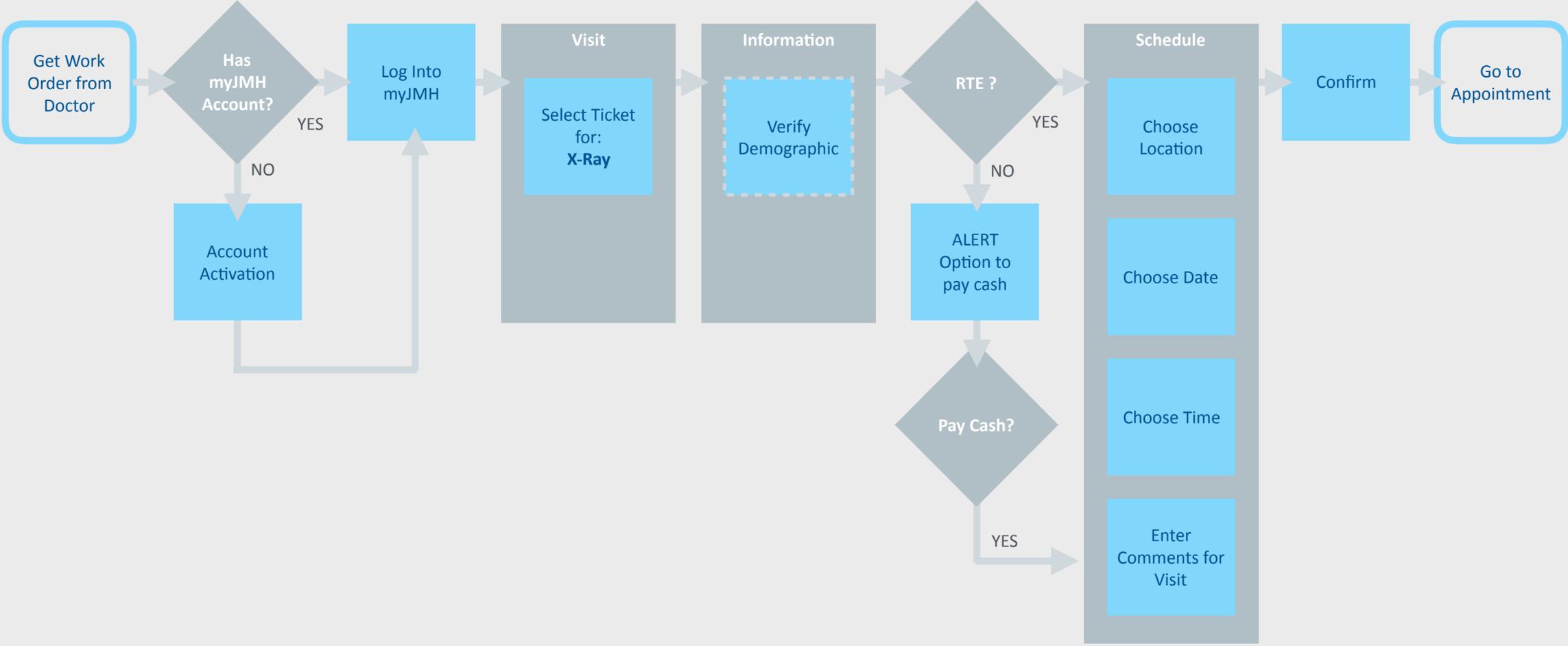
The PASE team does NOT check insurance for patients with x-rays. There is no time for the team to check a patient who is registering at the same time of the visit.

Mary doesn't know if her insurance is accepted.

She may discover at the last moment that she has to pay out-of-pocket.

She may have to walk away to contact the insurance.

After Mary completes registration, she has to wait for her turn in line.

If there are lots of people ahead of Mary, she may have to wait a long time.

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STORY 1 | Schedule an X-Ray > System Interaction

```
Get Work Order from Doctor
        ↓
Has myJMH Account? ── YES ──→ Log Into myJMH
        │ NO
        ↓
Account Activation
        │
        └──────────→ Log Into myJMH
```

Visit
Select Ticket for: **X-Ray**

Information
Verify Demographic

RTE ? ── YES ──→ **Schedule**
    │ NO
    ↓
ALERT Option to pay cash
    ↓
Pay Cash? ── YES ──→ Enter Comments for Visit

Schedule
- Choose Location
- Choose Date
- Choose Time
- Enter Comments for Visit

→ Confirm → Go to Appointment

LEGEND:
⚙ Patient
📌 John Muir Health

⚙ If patient doesn't have a myJMH account, s/he can create one.

📌 New feature: **Ticket Scheduling**

⚙ If patient has already logged into the system in the last 7 days, then the Demographic screen will not appear.

📌 Optional additional new feature: **Real Time Eligibility** RTE.

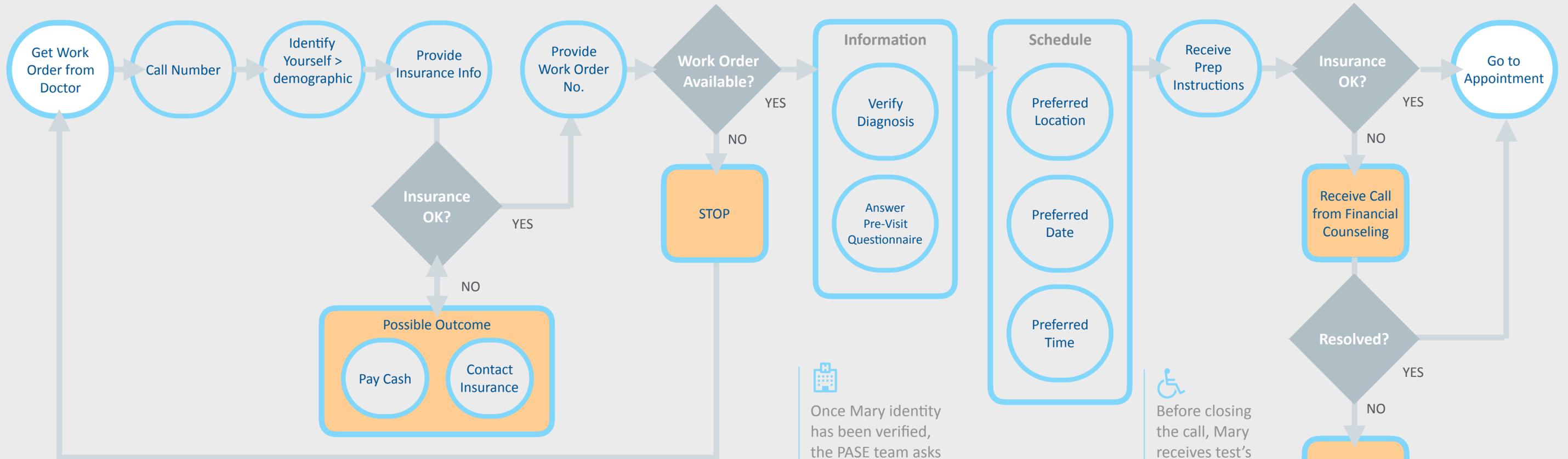⚙ The system shows available times across locations, so that patients can compare options.

STORY 2 | Schedule an MRI

As a **patient of John Muir Health** I want to **schedule an MRI appointment online**, so that I can **make arrangements with my family** for the best date/time/location for me to choose.

SYSTEM CRITERIA:

■ Enable Ticket Scheduling for **MRI**, on the myJMH patient portal. [NEW Feature - Ticket Scheduling]

■ Show open days and times.

■ Show list of available locations.

■ Perform eligibility check of insurance [Opt. Additional New Feature - Real Time Eligibility]

STORY 1 | Schedule an MRI > Human Interaction

Get Work Order from Doctor → **Call Number** → **Identify Yourself > demographic** → **Provide Insurance Info** → **Provide Work Order No.** → **Work Order Available?**

Insurance OK? — YES / NO

Insurance OK? — YES

Work Order Available? — YES / NO

STOP

Possible Outcome
- Pay Cash
- Contact Insurance

Information
- Verify Diagnosis
- Answer Pre-Visit Questionnaire

Schedule
- Preferred Location
- Preferred Date
- Preferred Time

Receive Prep Instructions → **Insurance OK?** — YES → **Go to Appointment**

Insurance OK? — NO → **Receive Call from Financial Counseling** → **Resolved?** — YES / NO

STOP

A **work-order** is required to get an MRI.

Work orders are usually given to patients in paper-format.

A printed order is easy to misplace.

The **number** Mary calls, redirects to the PASE team.

Not all work orders come with a phone.

Calling is challenging: busy line, 8 to 5, answering machine, wrong numbers.

When Mary calls, she has to answer many questions to identify herself.

This is a lenghty process.

While on the phone, Mary needs to find her insurance card.

This may take some time, and often is a reason for patients to call back.

Mary needs to have a copy of her work **order** handy, in case the staff hasn't received it yet.

If the order is not available, then the call can not continue.

The PASE team needs to find the **work order** into the system.

There are more than 3000 active work orders in the system at any given time.

Once Mary identity has been verified, the PASE team asks about the diagnosis and then proceeds with the **pre-visit questionnaire** to ensure that the patient is fit for taking the test.

The questions are many and may not be in patient's friendly terms.

Understanding and writing what a person is saying over the phone is prone to errors.

The PASE team needs to go over the **available times** in the locations indicated by the patient.

With multiple locations to choose from, matching what works for the patient with what is available, can be time consuming.

Before closing the call, Mary receives test's **instructions**, so that she may prepare for it.

Instructions are given verbally, leading to possible misunderstanding, incomplete follow-throug, and eventual rescheduling of the procedure.

Each call takes an average of 10-20 min.

After the call, the PASE team sends Mary's info to the **Financial Counceling** team for insurance validation.
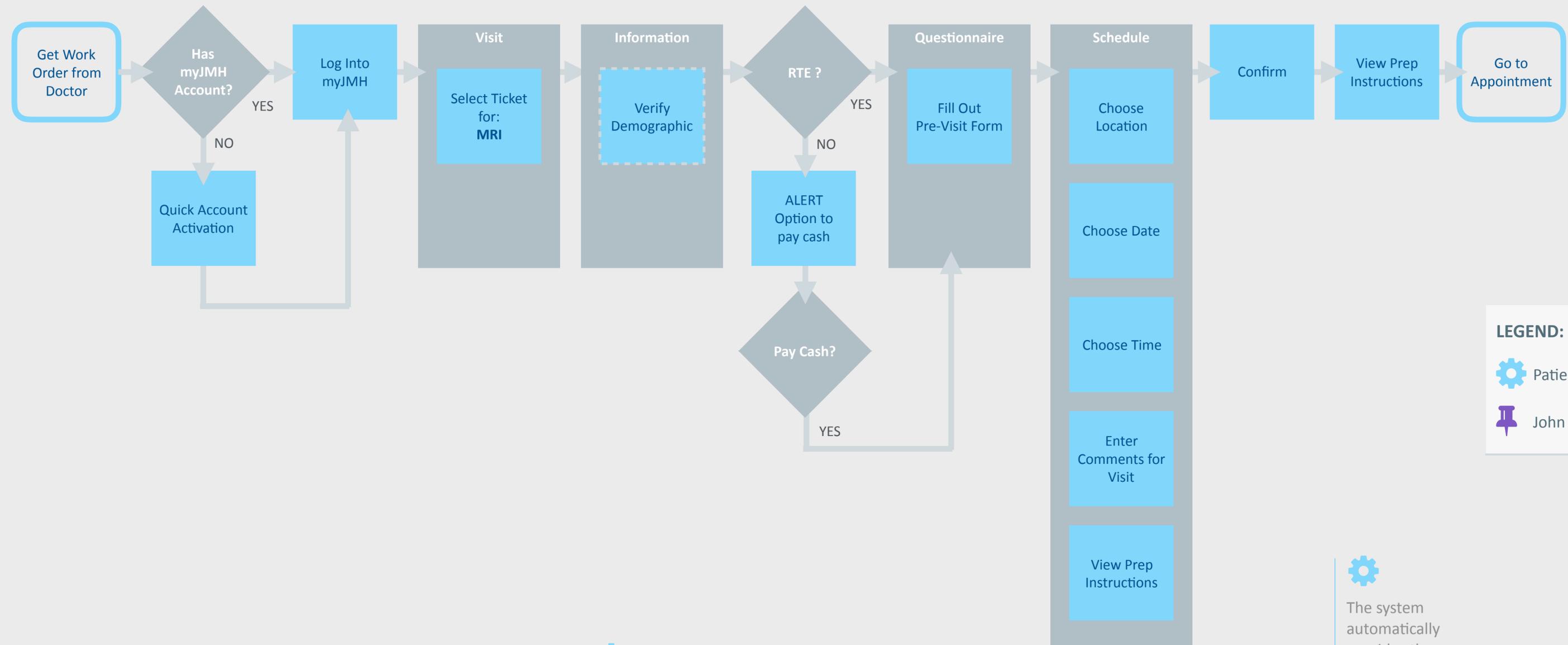
If Mary's eligibility check fails, she could end up cancelling the appt.

LEGEND:
- ♿ Patient
- 🏥 John Muir Health

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STORY 1 | Schedule an MRI > System Interaction

Get Work Order from Doctor → **Has myJMH Account?** — YES → **Log Into myJMH**

Has myJMH Account? — NO → **Quick Account Activation** → **Log Into myJMH**

Visit — Select Ticket for: **MRI**

Information — Verify Demographic

RTE ? — YES → **Questionnaire** — Fill Out Pre-Visit Form

RTE ? — NO → **ALERT Option to pay cash** → **Pay Cash?**

Pay Cash? — YES → **Fill Out Pre-Visit Form**

Schedule — Choose Location, Choose Date, Choose Time, Enter Comments for Visit, View Prep Instructions

Confirm → **View Prep Instructions** → **Go to Appointment**

LEGEND:

⚙ Patient

📌 John Muir Health

If patient doesn't have a myJMH account, s/he can create one.

New feature: **Ticket Scheduling**

If patient has already logged into the system in the last 7 days, then the Demographic screen will not appear.

Optional additional new feature: **Real Time Eligibility** RTE.

The system presents a set of pre-visit questions to ensure that the patient is fit for the procedure.

The system shows available times across locations, so that patients can compare options.

The system automatically provides the instructions for the procedure.

Patients can print them or view them online up to the time of the appointment.
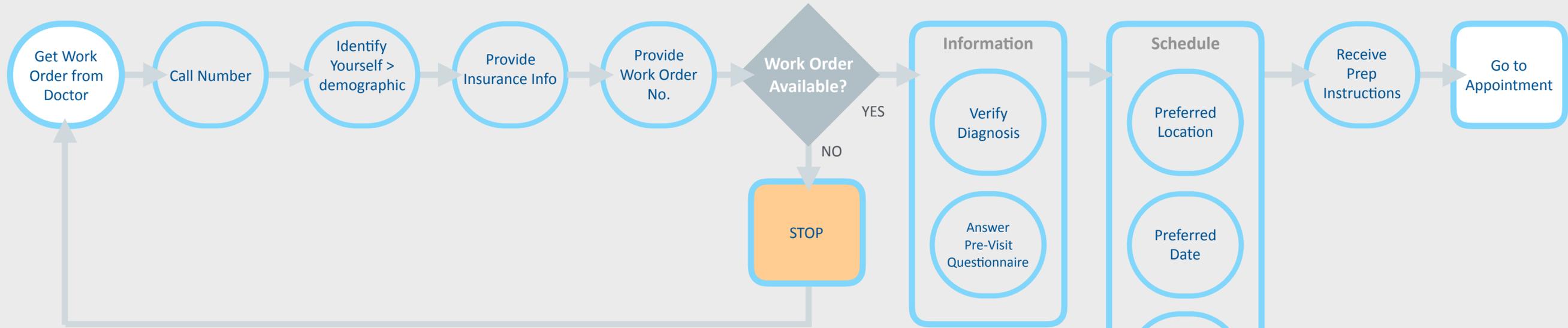
STORY 3 | Schedule an Ultrasound

As a **patient of John Muir Health** I want to **schedule an Ultrasound appointment online**, so that I can **make arrangements with my family** for the best date/time/location for me to choose.

SYSTEM CRITERIA:

■ Enable Ticket Scheduling for **Ultrasound**, on the myJMH patient portal. [NEW Feature - Ticket Scheduling]

■ Show open days and times.

■ Show list of available locations.

■ ~~Perform eligibility check of insurance~~. < DOESN'T REQUIRE AUTHORIZATION >

STORY 1 | Schedule an Ultrasound > Human Interaction

Get Work Order from Doctor → **Call Number** → **Identify Yourself > demographic** → **Provide Insurance Info** → **Provide Work Order No.** → **Work Order Available?**

YES → **Information** → **Schedule** → **Receive Prep Instructions** → **Go to Appointment**

NO → **STOP**

Information
- Verify Diagnosis
- Answer Pre-Visit Questionnaire

Schedule
- Preferred Location
- Preferred Date
- Preferred Time

A **work-order** is required to get an MRI.

Work orders are usually given to patients in paper-format.

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The **number** Mary calls, redirects to the PASE team.

Not all work orders come with a phone.

Calling is challenging: busy line, 8 to 5, answering machine, wrong numbers.

When Mary calls, she has to answer many questions to identify herself.

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While on the phone, Mary needs to find her insurance card.

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Mary needs to have a copy of her work **order** handy, in case the staff hasn't received it yet.

If the order is not available, then the call can not continue.

The PASE team needs to find the **work order** into the system.

There are more than 3000 active work orders in the system at a ny given time.

Once Mary identity has been verified, the PASE team asks about the diagnosis and then proceeds with the **pre-visit questionnaire** to ensure that the patient is fit for taking the test.

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With multiple locations to choose from, matching what works for the patient with what is available, can be time consuming.

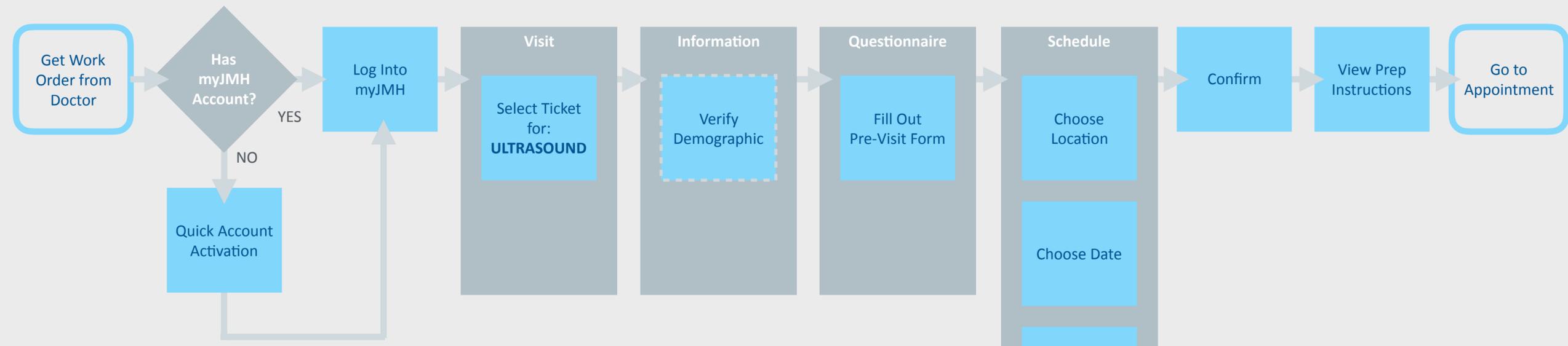Before closing the call, Mary receives test's **instructions**, so that she may prepare for it.

Instructions are given verbally, leading to possible misunderstanding, incomplete follow-throug, and eventual rescheduling of the procedure.

Each call takes an average of 10-20 min.

LEGEND:
Patient
John Muir Health

2018   X

STORY 1 | Schedule an Ultrasound > System Interaction

Get Work Order from Doctor

Has myJMH Account?
YES
NO

Quick Account Activation

Log Into myJMH

Visit
Select Ticket for: ULTRASOUND

Information
Verify Demographic

Questionnaire
Fill Out Pre-Visit Form

Schedule
Choose Location

Choose Date

Choose Time

Enter Comments for Visit

View Prep Instructions

Confirm

View Prep Instructions

Go to Appointment

Ultrasounds do NOT require authorization from insurance

LEGEND:
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📌 John Muir Health

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⚙ If patient has already logged into the system in the last 7 days, then the Demographic screen will not appear.

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