The purpose of this document is to provide a comprehensive overview of the Exam Scheduling Process

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Action Items

Data Definition Document

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# Introduction

# Overview

# Scope

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| --- |
|  |

# Process Description

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|  |

## Goals & Objectives

What are the types of issues that occur that prevent or impede the Scheduler from meeting the primary Objectives of the Exam Scheduling Process?

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| --- |
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## Roles & Responsibilities

This section details the responsibilities for each party involved in the Process. Entities within this section can be either a single person, a pre-defined group (eg. Change Approval Board) or a specific Job Title.

|  |  |
| --- | --- |
| Role | Responsibilities |
|  |  |
|  |  |
|  |  |
|  |  |
|  |  |
|  |  |

# Process Control

## Boundaries/Triggers

*Start*

|  |
| --- |
|  |

*Intermediate Events*

|  |
| --- |
|  |

*Stop*

|  |
| --- |
|  |

## Related Processes

What other related processes are impacted by Exam Scheduling?

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| --- |
|  |

## Business Rules

|  |
| --- |
|  |

# KPI’s and Metrics

### Operational Metrics

These are basic observations of operational events for each process area. They are the starting point for the model and will be used to calculate the KPIs.

|  |  |
| --- | --- |
| XREF | Metric |
| A |  |
| B |  |
| C |  |
| D |  |
| E |  |
| F |  |
| G |  |
| H |  |
| I |  |
| J |  |

### Key Performance Indicators

KPIs are metrics that are used to indicate the performance level of an operation or process. KPIs are used to provide a basis for actionable management decisions. They are calculated or derived from one or more Operational Metrics and then the results of these calculations are compared to the Tolerance Thresholds to identify whether those results fall within acceptable levels.

|  |  |  |
| --- | --- | --- |
| XREF | KPI | Calculation |
| 1 |  |  |
| 2 |  |  |
| 3 |  |  |
| 4 |  |  |
| 5 |  |  |
| 6 |  |  |
| 7 |  |  |
| 8 |  |  |
| 9 |  |  |

#### Why these Metrics (KPIs) Matter

The KPIs described above are critical to managing and controlling Appointment Scheduling activities. The following table lists each Exam Scheduling KPI and the question it is trying to answer:

|  |  |
| --- | --- |
| KPI | Question Being Answered |
|  |  |
|  |  |
|  |  |
|  |  |
|  |  |
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### Tolerance Thresholds

Tolerance Thresholds represent upper and lower boundaries for acceptable and non-acceptable KPI values. They should be set by the Service Manager and agreed to by operational and Senior Management. Each KPI should be associated with one or more Tolerance Values. For example, an upper value can represent a desired service target for the KPI and the lower value can represent a warning level or point at which some further action should occur.

Tolerance values are based on desired service and performance levels that the business is willing to tolerate.

|  |  |  |
| --- | --- | --- |
| KPI | Service Target | Warning Level |
| Number of Appointments Scheduled |  |  |
| Reschedule Rate |  |  |
| Average Scheduling Turnaround |  |  |
| Number of Appointments Scheduled within Agreed Service Levels |  |  |
| Number of Rush Cases Scheduled within Agreed Service Levels |  |  |
| Out-of-Area Request Rate |  |  |
| Scheduling Labor Utilization Rate |  |  |
| Exam Scheduling Fulfillment Tooling Support Level |  |  |
| Exam Scheduling Process Maturity |  |  |

### Critical Success Factors (CSF’s)

These are the metrics that represent key operational performance requirements which indicate whether a process or operation is performing successfully from a customer or business perspective. They are calculated or derived from one or more KPIs by comparing how those KPIs performed within the tolerance range.

A CSF is usually indicated with a performance level that indicates a likelihood of success as to whether the CSF was achieved. Typically, this performance level can be something as simple as *High, Medium, Low*

|  |  |
| --- | --- |
| CSF | Performance Level |
| Appointment Scheduled within Customers agreed to Service Level |  |
|  |  |
|  |  |
|  |  |
|  |  |
|  |  |
|  |  |
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### Outcomes

Outcomes are key indicators of general business risk areas. These are associated with performance indicators that identify the success, risk or failure of KPIs or CSFs. Outcomes are used to quickly assess the level of risks created by process or operational deficiencies. In short, Outcomes are the type of thinks that the Process is designed to protect against.

For the Exam Scheduling Process, examples include:

|  |
| --- |
|  |

Each of the above Outcomes can be associated with a performance indicator such as *High, Medium, or Low* that might reflect the likelihood or risk that the Outcome will occur. The Risk level is derived from the mean average of the CSF performance levels. Scoring for an Outcome runs opposite to how the CSFs are calculated. If a CSF scores *Low*, meaning the likelihood of achieving that CSF is Low, then the Outcome would score *High*. This means that the risk of the Outcome occurring is high because the CSF achievement was low.

### What-If’s

What-If’s can be characterized as Use Cases derived from impending business decisions. These will be used to “model” the impacts of those decisions on KPIs and CSFs. An example of a Use Case is simply a scenario for some future events. Example might include:

* What happens if we replace a particularly problematic Medical Provider with a higher quality provider?
* What happens if we cut operational staff?

### Analytical

The Analytical category of metrics is used to separate out certain metrics that are really more helpful for supporting research into an issue, incident or service problem. These are metrics that may be reported on a one-time basis or as part of a drill-down (such as for a Dashboard).

Typically, these kinds of metrics are usually subsets or subdivisions of other metrics. One example might be the Operational Metrics of *Total Number of Appointments Scheduled*. For analytical purposes, you may also wish to see this total broken out by:

* Geographical Region
* Employer
* Drive Time

# Data Fields