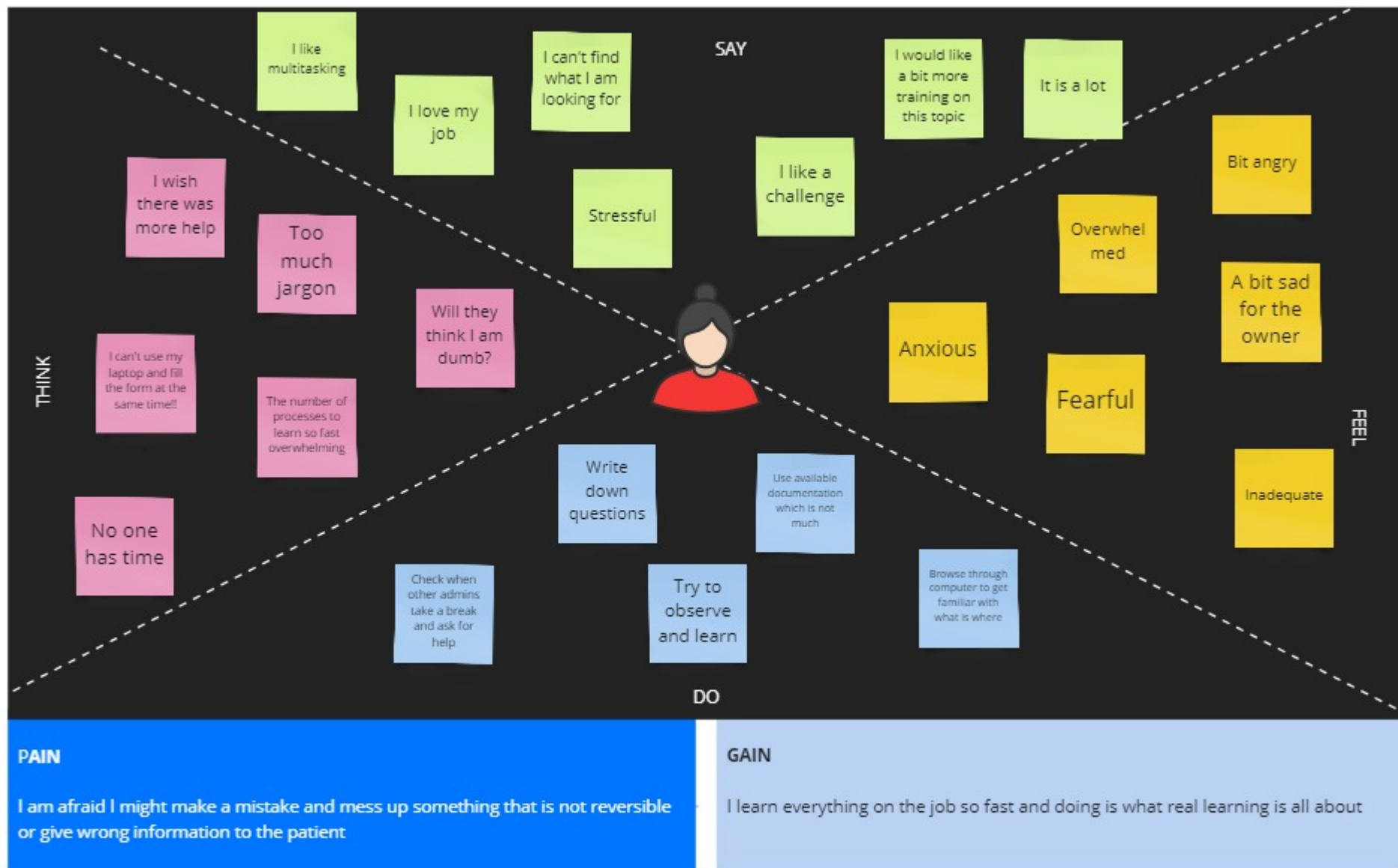




Phase 2: Visualize

CURRENT STATE: CREATE USER GROUPS AND TASKS BREAKDOWN - USER STORY MAPPING

REBECCA - OWNER AND THERAPIST

- Therapy time with the kid patients quite full on in the week
- Lots of Business related responsibilities
- Super user for Folders and files, directory structure
- Answerable to patient parents
- HR Functions, interviews, and final say on who gets hired
- Transition to telehealth during Covid
- Always ensuring HIPPA compliance

THERAPISTS/ CLINICIANS

- Keeping Rebecca (owner and therapist) regularly informed about everything
- Therapy time with the kid patients quite full on in the week
- Answerable to patient parents
- Interview new hires
- Transition to telehealth during Covid
- Always ensuring HIPPA compliance
- Writing DPN after patient visit and keeping them up to date
- Checking and signing off Encounter Forms after patient visit

ALL ADMINS

- Keeping Rebecca (owner and therapist) regularly informed about everything
- Morning opening duties at the clinic like alarm, TV, food
- Greeting patients on the phone and at the clinic
- Patient check-in procedures
- File organization
- Knowing security protocol and where related forms online are
- Internal correspondence, sorting mail
- Keeping inventory up to data
- Keep up to date, newsletters, pamphlets, bulletin boards and signage
- Perform procedures for new patient intake
- Schedule new patient evaluations in consultation with Rebecca
- Keep up to date, the Referral tracker and Evaluation tracker
- Knowing to create an Evaluation shell
- Adding, changing and deleting appointments in calendar, Understand the protocol.
- Scoring the Vineland
- Checking for accuracy DPNs, Printing Encounter Forms

SENIOR ADMIN

- Keeping Rebecca (owner and therapist) regularly informed about everythig
- New patient intake and regular patients : Benefits Check and calling insurance.
- Calling parents after Benefits Check and giving them information about out of pocket spend
- Working on EMR System KAREO
- Addig new patients and updating them
- Adding new encounter for Patient
- Generating Patient Statements
- Posting payments to patient files
- Posting payments to insurance
- Processing credit card payments and refunds
- Being detail oriented, spotting errors, discrepancies
- Questioning insurance and working hard to make them pay
- Knowing and sometimes doing the tasks and procedures that the Admins do

Phase 3: DESIGN MIND YOUR GAPS SOLUTION FOR HIGH ATTRITION NEW ADMINS

USER STORY MAPPING FUTURE STATE

NEW ADMIN JOINING NOW ONWARD WILL GO THROUGH THIS STRUCTURED PROGRAM

WEEK 1	It is now required to meet Rebecca each week and give status on how they are learning and coping, express any concerns	Login, Email procedures, security and HIPPA compliance	Opening duties and closing duties, room details	Learning Horton system	Learning Horton system and tasks on it	Protocol for greeting patients, old and new	Completing Time Sheets
WEEK 2	Patient check-in procedures	Patient file organization - medical info, financial info	Important procedures for child (patients) safety and security procedures	Incident Reporting	Student Therapist observers protocols	Learn to learn several internal procedures at Walcott Task 2	Payment procedures and credit cards used by patients
WEEK 3	New Patient intake and processing	Handovers to Senior admin and getting information back	Scheduling Patient Evaluations	Referral Tracker	How to check DPMs		
WEEK 4	Practice with all that you have learned so far	Still keep learning many of the internal procedures like newsletters, signage, inventory, sorting mail etc					
WEEK 5	Learning Ability system for Benefits Checks	Creating an Evaluation Sheet	Keep executing previous learned tasks to master them	Still keep learning many of the internal procedures like newsletters, signage, inventory, sorting mail etc			
WEEK 6	Learn using Vineland and scoring the Vineland	Learn task on Calendar system - Add, Change and Cancel patient. Work with other admin on this as it is easy to mess up	Keep executing previous learned tasks to master them	Still keep learning many of the internal procedures like newsletters, signage, inventory, sorting mail etc			
WEEK 7	Learn DMR system KARCO basics	Keep learning calendar with fellow admin	Keep executing previous learned tasks to master them				

WEEK 3

New Patient
intake and
processing

Handovers to
Senior admin and
getting
information back

Scheduling
Patient
Evaluations

Referral Tracker

How to check
DPNs

SUBTASK 1

Handling New Patient Parent

SUBTASK 1

Entering Information

SUBTASK 1

Contacting Senior Admin

Open each card to see detailed steps