Optimize ▶
BY COMPASSCARE

THE OPTIMIZE SOLUTION

GETTING BETTER FASTER, BECAUSE EVERY LIFE MATTERS

Optimize is a comprehensive software system that integrates scheduling, service processes, charts, database, reporting, and inventory management.

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INTRODUCTION

Optimize is the tree that has finally sprung from the germ of an idea at CompassCare nearly 10 years ago, when CompassCare was just beginning to train other Pregnancy Centers in the Optimization Tool, the movement's first-ever Linear Service Model. The seed sprouted in 2011, when a team of IT project managers and software developers was assembled with CompassCare's patient service team to explore the creation of a Medical Process Management software system. By September 2015 the sapling had grown, and Optimize was first used with CompassCare's patients in Rochester, NY. Optimize has subsequently been tested and implemented at other pregnancy centers in Florida, Georgia, Wyoming, California, Massachusetts, Illinois, and Ohio. Now the Optimize Medical Process Management software system is ripe for release to the pregnancy center movement.

The initial Optimization Tool (OT) is a highly detailed, paper-based system for running standardized patient services at a pregnancy center. The core of OT is a Linear Service Model, a step-by-step approach to patient services which attempts to insure that every patient receives the same high-quality care through a documented and measurable process. If we are serious about getting better at serving women at-risk for abortion in such a way that they choose to have their babies more consistently, then we have to know what works and what doesn't work. Consistency of service and objective measurability provide pregnancy center teams with the necessary basis to make targeted improvements. We only measure to get better. And we can only measure if services are performed in the same order, the same way with each patient. Documenting service processes not only helps maintain the consistency of services between providers like advocates and nurses, but also assists the training of new staff while mitigating many legal concerns of liability and misinformation. Moreover, centers who have implemented the OT have regularly seen a 4x increase in the number of abortion-minded women that they were able to reach and serve.

As groundbreaking as OT and the Linear Service Model concept have been for the pregnancy center movement since 2004, the paper based OT is no longer sufficient. The Optimize MPM software system is the next giant leap forward for serving women at-risk for abortion and giving pregnancy centers the tools to get better faster together, because every life matters.

INSUFFICIENCY OF THE PAPER-BASED OPTIMIZATION TOOL

FLEXIBILITY

By far one of the most significant drawbacks of the paper based OT is its rigidity. Paper systems are by nature static, a snapshot in time for the best standardized process for abortion-minded women. This snapshot in time does not allow for easy modifications for improvement. Given the fast pace at which cultural expectations are changing this slow paper based reality is no longer sufficient to stay on the cutting edge of helping women considering abortion to have their babies.

Consider the list of referrals that is typically given to a patient through the paper OT. The intention from the earliest days of the OT was to create a customized referral list for each patient, based on their particular needs and situation. But with a piece of paper, the ability to customize is severely limited. At best we can present a static document and check off a few options that could possibly fit the needs of the patient; and we might add a few blank lines at the end for the provider to insert something actually customized if she can remember. All this requires the provider to be an expert knowing all the available community resources (or to spend a precious ten minutes during a patient's appointment flipping through a giant community resource binder: *"There's got to be a referral for that here somewhere… Hey, Mary, do we have a referral for ___?"*).

With Optimize, the entire list of community resources is available to the provider while she engages a patient, filtered by any relevant criteria. Referrals that require a patient to live in certain zip codes or be a certain age or only wear blue shoes on Tuesdays are automatically filtered in or out of the available list based on the patient sitting in the room. The provider can quickly create a completely customized resource and referral list for her patient without needing to be a community resource expert. And with a wireless printer, she can print it off right from her tablet.

On a macro level, CompassCare has recognized that one of the significant barriers for pregnancy centers adopting the paper OT model was flexibility. OT required other centers to do things the 'CompassCare way'. Maybe you haven't noticed, but folks in pregnancy center ministries are passionate. Most people do not have the time to self-reflect in such a way that allows them to make the distinction between passion for the mission from the methods used to accomplish that mission. We are dedicated to serving women and saving babies, which often means we're dedicated to the particular approach we've used to serve women. *Someone else's way? How is that better?*

Personal passions aside, different locations and different cultures may require unique service processes to achieve the highest levels of effectiveness. State and local regulations or specific program-based grants may require centers to provide certain documentation or use specific forms.

The exciting news is that Optimize is completely customizable on a per-center basis. You can literally build your own Linear Service Model. Optimize can guide your teams through serving patients the way *you* want to serve them, with *your* scripts and *your* steps.

One of the most thrilling aspects of Optimize is that in customizing the processes with your own distinctiveness, you can impact the entire pro-life service movement. Every center that participates in Optimize will share de-identified data, allowing you to compare your results with different service process used by different centers. If you find a way that is more effective than others, we'll shout it from the rooftops. And if other centers see that your method is more effective than their own, they can try it themselves with little more than the 'flip of a switch'!

PROVIDER-DRIVEN SERVICES

In the process of training other pregnancy centers to implement OT in 2006 we realized the massive amount of information that a nurse or advocate had to learn and retain in order to deliver the Optimization Tool's patient service platform exactly as designed. The question quickly arose: "Wouldn't it be great if there was some kind of system that would prompt the service provider through the process, providing the right service step with the appropriate transition script at the right point in the process?"

OT is a system of steps and scripts which a nurse or advocate must memorize. This makes the training process long and somewhat arduous, and the process tends to degrade over time. Since the service provider is relied upon to drive the patient engagement, it is easy for subtle and often unintentional cutting of corners and modification of scripts to occur. Over time, the patient engagement by one provider may look significantly different than that of another. Inconsistent services make objective measures difficult if not impossible, and generally result in fewer women continuing their pregnancies.

Provider driven services also leave significant room for tasks to slip through the proverbial cracks. For example, we cannot know how many patient follow-up calls were never made because a sticky note got knocked off of a chart (or wasn't put on in the first place).

The Optimize MPM software system provides a step-by-step guide for each patient engagement (from scheduling to follow-up), complete with scripts and instructions. This amounts to a reduction in training time for staff, and significantly curbs process degradation.

DATA-ENTRY AND ANALYTICS

Analyzing and reporting on performance data is critical for pregnancy centers, whether celebrating lives saved with staff and donors, evaluating staff performance, or internal continuous improvement efforts to test and measure new ways to serve patients to save even more lives. Data analytics requires some kind of database. One weakness of the paper based OT is manual data capturing of patient service. When data is entered by hand after a patient appointment it cannot be quickly, easily and accurately accessed and used. The process of writing down information on paper and then transferring it to a database is cumbersome, time consuming and fraught with opportunities for error. Pregnancy center databases therefore often have to limit the kinds of data captured to a small subset of what is kept in paper charts.

With the Optimize MPM, double-entry of data is eliminated. Instead of writing things down on paper and entering them later in a database, the service provider uses a tablet or computer during the patient engagement, recording *everything* directly into Optimize real time. Eliminating the paper to database step saves significant labor time for the center staff, improves confidentiality, and allows for more accurate and timely reporting and data analysis on any information that is captured about patients. Imagine having at your fingertips information on where your patients live for targeted marketing efforts. Imagine the ways you could improve if you knew that Nurse Jennie's patients carry to term twice as often as any of your other staff; or that one of the members of your scheduling team had a show rate of 73% compared to the 58% team average; or that your suburban middle-class patients chose to abort 70% of the time while your poor urban patients chose to abort at half that rate.

Similarly, providing service teams with real-time feedback on their performance results inspires each team to take ownership of patient service processes and drive continuous improvement themselves. In many areas of medicine, real-time feedback is essential for safe operation. Imagine the anesthesiologist without second-by-second feedback on vital signs. It's dangerous to drive a car without a temperature gage. But even in industries that are not as critical real-time performance feedback on a particular goal improves team results. Your grocer may display items per minute on the screen of each cashier, giving them immediate feedback on their performance. Every sporting event has a scoreboard. Optimize provides a center with the ability for every patient service team to gain real-time feedback on the part they play in serving women and saving lives.

MEDICAL CHARTS

There are several disadvantages of a paper medical record which are immediately apparent. Paper takes up physical space. New York, for example, requires that medical records be kept for seven years after a patient engagement (or seven years after a patient's 18th birthday, if she was a minor at the time of service). That's a lot of paper! Massive filing cabinets make finding a single chart difficult, especially for a patient returning with another pregnancy years after her initial engagement. Optimize includes complete electronic medical records, so you never struggle with physical storage space again, and you can find any patient's chart in seconds with a simple search.

Paper charts are less permanent than electronic charts. You can't spill coffee on Optimize, and you can't lose records in a fire. And they can't be accidentally accessed by unauthorized personnel.

Paper charts are increasingly becoming a liability in establishing a center as credible and professional in the eyes of the patient. Patients, particularly in the current and coming generations of women at-risk for abortion, are

accustomed to everything, including their medical records, in electronic format. Paper charts are currently seen as less-than professional, while using a tablet in the exam room (instead of a desktop computer) is seen as a technological step above current standard of practice. The provider thumbing through a chart of papers to find a certain bit of information may appear less knowledgeable and confident in the eyes of a patient than one quickly accessing that information with a few taps on a tablet. Optimize provides a smoother, cleaner and more streamlined appointment experience for both patients and providers.

MEDICAL DIRECTOR ENGAGEMENT

Most pregnancy centers have volunteer medical directors who oversee the medical services and medical staff at the center. They also read and sign exam reports and medical charts. In practice, this often amounts the physician spending some time at the center every week or center staff regularly carting a box full of charts to the medical director's home or office so that exams and charts can be reviewed. Unless the charts are transported in a metal lock box, such transportation jeopardizes security and patient privacy. For many centers the time between the performance of an ultrasound exam and the diagnosis of pregnancy can easily span an entire week—a very long time in the life of a woman in crisis.

With Optimize, the medical director can securely access charts, exam data and images from any tablet or computer at his/her convenience, immediately after the scan is performed offering physicians the ability to read exams on a daily basis if necessary, without a requirement to physically move charts. Optimize is built with an app (or section of the software) just for the medical director, with an easy to use interface designed to require minimal training. Even doctors who are self-proclaimed digital curmudgeons have found Optimize more convenient and easier than expected.

INVENTORY AND MEDICAL LOGGING

As medical providers, we must have an accurate record of everything we dispense. We fill entire binders with logs which we hope to never have to use, because if we did have to find the lot number and expiration date of the pregnancy test we gave to Susie Q last year, it might take 20 minutes (and all the while we're praying that the nurse wrote it legibly).Handwritten logs of pregnancy tests administered, ultrasound exams preformed, STDs diagnosed and treated… these handwritten logs (or perhaps computer spreadsheets) are a necessary part of the paper OT.

So Optimize has a built-in inventory management system for any tests performed and drugs that dispensed. Inventory is integrated directly within the appointment processes (and it will even remind you when you need to reorder supplies)! All logging is automated, and the logs are completely searchable.

BENEFITS SUMMARY

The core benefits of Optimize MPM software can be boiled down to four categories:

- Efficiency: Work faster to increase capacity
- Flexibility: Work smarter to tailor services to your community.
- Continuous Improvement: Get better locally and nationally, to stay on the cutting edge.
- Security: Demonstrate professionalism to increase patient trust.

OPTIMIZE IS A COMPREHENSIVE SOFTWARE SYSTEM THAT INTEGRATES SCHEDULING, SERVICE WORK FLOW, MEDICAL CHARTING, DATABASE, PERFORMANCE METRICS REPORTING AND INVENTORY MANAGEMENT.

Optimize is built on the salesforce.com (SFDC) cloud, with a Skuid user interface (or UX, user experience). That means Optimize uses SFDC to store and manage data while leveraging Skuid to present that data to users in a way that makes it easy for users to enter that data in their patient interactions at the appropriate time and in the appropriate way.

Figure 1. Optimize, Skuid, and Salesforce

SALESFORCE.COM

SFDC is the world-leading customer relationship management (CRM) software. With customers ranging from financial institutions like American Express and Charles Schwab, to industry leaders like GE and Toyota, to household names like Dunkin Donuts and Hershey's Chocolate, to medical institutions like UC Health, salesforce is a proven, stable and secure solution.

With SFDC, world-class security systems protect your data and eliminate potential threats. The geeks among us may enjoy a visit to SFDC's Trust website for details on security and legal compliance (including HIPAA compliance). Since it is a cloud-based software system, there is nothing you need to download onto your local systems, and no technical requirements beyond a modern browser and a reasonable internet connection.

SFDC is also highly flexible, allowing complete customization of database objects and fields. Optimize is built entirely on custom objects, so it will not interfere with the operations of centers already using salesforce for another purpose (as a donor management system, perhaps).

To make all this even more attractive, salesforce offers 10 FREE Enterprise Edition licenses through salesforce.org to any non-profit organization like pro-life pregnancy centers. An enterprise edition license typically costs $125 per month, billed annually. If you make use of all ten licenses, you're getting a $15,000 annual value for free. If a center needs more than 10 licenses, the costs are $48 per month. However, most centers need fewer than 10.

SKUID

Skuid is the #1 UX solution for the salesforce.com platform. This allows us to quickly and easily build customized user experiences on a per center basis. Skuid is where the magic of Optimize happens, delivering intuitive queues of appointments, customized calendaring and scheduling functionality, step by step appointment processes, meaningful performance charts and graphs and more, all with point and click customization. With just a little bit of training, you can change how Optimize looks, from the words of scripts to the development or placement of process steps, without writing (or seeing) a single line of software code.

Additionally, Skuid has experience working with healthcare organizations and nonprofits. Pregnancy centers may find the success stories of Skuid customers like Chrysalis and The Chalmers Center particularly helpful. While not an explicitly Christian organization, the leadership and many of the staff at Skuid are Christians, and are delighted to partner with CompassCare and pregnancy centers everywhere to help continue to reverse America's abortion trend one woman at a time.

ELIGIBILITY

Optimize software is designed for pregnancy centers who meet the following criteria:

- Currently offer medical services such as ultrasound diagnosis of pregnancy, provided by licensed medical professionals.
- Currently use a Linear Service Model (A *step-by-step process used by your team to serve your patients in a consistent, meaningful and measureable manner*)
- Have a focused Mission Statement. For example: "To erase the need for abortion in Rochester."
- Measure mission performance.
- Demonstrate a commitment to improve and streamline services in order to become more efficient and effective in accomplishing your mission by defining measurable results and setting goals for improvement.
- Actively advertise to reach the target market: pregnant women at-risk for abortion.
- Willingness to participate in a Continuous Improvement Network with other PRCs using the Optimize software.
- Have a healthy Board-Executive relationship and a Board consensus on decision to transition to Optimize.
- Minimum annual budget of $100,000.

EXPECTED MISSION IMPACT

There are high expectations for the impact Optimize MPM software will have on your pregnancy center. You can expect Optimize to:

- Dramatically reduce onboarding and training time for new staff and volunteers.
- Eliminate data entry as a separate task.
- Increase data accuracy.
- Increase data security.
- Speed up and streamline the process of implementing your customized Linear Service Model.
- Simplify administration and afford insights for targeted improvement efforts by providing real-time performance data tracking with easy-to-understand dashboards and reports.
- Reduce continuous improvement cycle time from 6-12 months to 6-12 weeks (depending on patient volume)

- Increase convenience for off-site Medical Directors to easily and securely access patient records.
- Save space, time and money by eliminating the use of paper charts.
- Increase credibility with patients and the medical community.
- Improve the mission effectiveness of pregnancy centers nationwide through a continuous improvement network with the ability to easily implement a high-performing process or step developed by any other center using the Optimize MPM.

And high expectations are not without merit. Since CompassCare, the pioneer of the linear service approach, launched Optimize in software form locally on Sept 1, 2015, there has been a 50% increase in the number of women at-risk for abortion who choose to continue their pregnancy, and a 9% increase in the lives saved rate over the same time period last year.
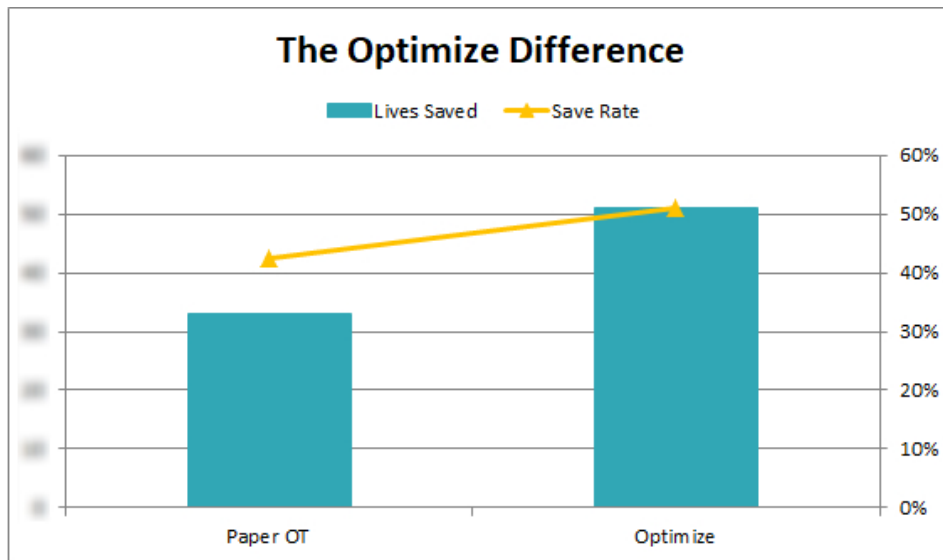

Figure 2. The Optimize Difference

SEE OPTIMIZE IN ACTION!

Visit https://ccoptimize.com/demo/ to view a 15 minute demo video.

STAFF EXPERIENCES

What are Optimize users saying about it?

"Our PRC nursing team has been using Optimize since it was launched over a year ago. It not only creates a sense of professionalism for our patients, it allows us to more readily engage in crucial conversations rather than flipping through pages on a clip board during the exam.   Optimize is super-efficient and very easy to use, substantially cutting down on our charting time. Posting test results, uploading ultrasound images and rescheduling appointments are done with a couple of keystrokes freeing us up to care for the patient. Since switching from paper charts and complicated databases to Optimize, our team has been able to give time to focusing our energy towards the more important mission of our organization: erasing the need for abortion."

"I can't imagine going back."

~Kathy Mauer, RN Team Leader, CompassCare

I love Optimize!

*I love that we can make it our own, whatever tweaks we want are usually attainable. The CompassCare team is quick to help with any issues or concerns we have. They very much value the input the centers who are using it give.

*It's the technology that our demographic are accustomed to and expect.

*The reports are right there in real time at our fingertips. AND SO EASY to pull.

*Very user friendly!

*There is no chart pulling – the patient's whole history is easily found.

*During appointments, you quickly learn where everything is and what you need, you can focus on the patient. Completing the chart is much quicker (and let's face it neater too) than using paper. Before Optimize, not only did we do paper charts, but we entered parts of the appointment into an electronic database, so basically double charting. Optimize easily cuts our documentation time in half!

*Our last chart audit was 100% compliant and I believe this is due to Optimize. The program is so thorough and lays out exactly what we need.

~Jill Miller RN, Nurse Manager, ABC Women's Center