



eQuity Workflow Solutions™

Case Management Process, Performance, & Outcomes: Practice Analysis — Caseload Stratification Inter-Rater Reliability — Acuity Tool Customization



Learn from the past.
Prepare for the future.
Act in the present.

To demonstrate the value of case management, decision makers from front-line staff to business executives seek clear and concise methods. They strive to identify the best medical and care management workflows possible to achieve:

- More efficient operations
- Better clinical outcomes
- Higher clinical staff satisfaction levels
- Improved risk management.

The search for enhanced case management processes and outcomes to achieve these goals leads us to the eQuity Workflow Solutions™.

The winning strategy of eQuity Workflow Solutions facilitates corporate clients, both large and small, to generate better clinical and financial outcomes while improving the job satisfaction of case managers. Through eQuity Workflow Solutions, Craig Research Continuum, LLC (CRC) works with your company's leaders and front-line staff to help you reach these goals.

Quantify Workflow. The eQuity Workflow Solutions' customized practice tools and strategies identify case acuity and quantify the work case managers carry out in concrete and measurable terms. When you can quantify work, you can produce reports and demonstrate strengths, improvements, and gaps.

Improve Efficiency. By identifying case acuity consistently, correctly, and timely, companies can target getting the most "bang for the buck." Business leaders use eQuity Workflows to determine cases in which the best work is done, to become more proficient in responding to the highest acuity cases, and to spot low acuity cases for minimal handling. As prediction and risk management skills improve, case managers can be more proactive.

Enhance Resource Allocation. Once acuity workflows are identified, resources can be focused where the best results are achieved. Using case acuity levels to allocate resources supports decision makers with sound reasoning front-line managers accept because they have active voices in signaling at-risk patients. Better resource allocation heralds improved productivity and job satisfaction.

To enhance case management processes and outcomes, eQuity Workflow Solutions use several strategic applications:

- Data Trifecta
- Reflective Practice Analysis
- eQuity Tool Customization
- Inter-Rater Reliability (IRR) Testing
 - Information Technology (IT) Fortification
 - Report Construction
 - eQuity Differential Assessment

One important reason to bring eQuity Workflow Solutions to your organization is to secure the winning combination of the **Data Trifecta** that represents patient-centric assessment, coordination, transition, and prioritizing of care needs.

Data Trifecta includes:

- **Process** – Case Acuity
- **Performance** – Caseload Acuity
- **Outcomes** – eQuity Differential.

Craig Research "was able to effectively integrate our business requirements and the Acuity tool. As part of this process, [Kathy Craig] was able to gather input from diverse sources to develop a coherent product. Her warm and professional approach was extremely helpful when engaging staff in the inter-rater reliability testing necessary to validate the tool."

- Anne Flaherty-Quemere, RN, BA
Business Unit Manager
Oncology Team
BCBS of Massachusetts

A CRC client starts the eQuity Workflow Solutions process by engaging in a **Reflective Practice Analysis** to examine the company's unique case management *workflow* factors. Discovering discrepancies allows them to be addressed to ensure the most efficient, and profitable, workflows possible.



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The **eEquity Tool Customization** tailors the eEquity Tool to the client's requirements informed by Practice Analysis discoveries. With acuity grounded in company practices, case managers are empowered to identify three acuity cornerstones: severity of patient needs, intensity of interventions to resolve needs, and overall case complexity.

After customization, the eEquity Tool's elements are assessed in a unique and essential confidence-builder – the **Inter-Rater Reliability (IRR) Test**. The IRR's scientific rigor tests the ability to produce similar acuity scores in similar cases. Establishing reliability constitutes the basis of validity upon which case acuity, caseload acuity, and acuity-based outcomes rest.

For **IT Fortification**, CRC works with in-house IT personnel (and/or CRC's IT team) to incorporate the eEquity Tool into the company's software platform. To engender optimal acceptance, the prototype is presented for feedback to supervisory and front-line staff. If desired, CRC can perform pilot testing.

Report Construction standardizes data into daily, weekly, and monthly reports about case acuity distributions, caseload portfolios, and closed-case acuity changes. Process successes and bottlenecks are quantified, as well as performance superlatives and struggles. Quality specialists have objective data to manage caseloads. Business leaders track economic indicators, throughput, and outcomes.

The outcomes arm of eEquity Workflow Solutions is the **eEquity Differential Assessment**, a metric representing the work case managers do shown as changes in acuity from case opening to case closure. Differentials can be measured, compared, and aggregated across cases, case managers, corporate clients, geographic parameters, hospital consortia, and diagnosis related groups.

The CRC team is committed to building and customizing eEquity Workflow Solutions that hit the Data Trifecta for you. CRC's team can help your company through one or more of the following services:

- Full range of consulting options
- Onsite workshops
- DVD online course
- Technical support.

To obtain this cutting-edge validated method for quantifying quality, contact us to learn about consultant, advisor, and workshop opportunities.

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For more background information on the CRC and Acuity Workflow Solution, see http://www.schoonerhealth.com/Craig_Research_Continuum_.html

