welcome

to the

2023 Patient Access Collaborative Annual Symposium

May 9 - 11, 2023

East Lansing, Michigan

Host: MSU Health

Location: The Graduate Hotel + Various Sites on the Campus of Michigan State University

Hotel WiFi in Conference Area
Graduate_Meeting
PW: weareallstudents
MSU Campus
Open WiFi: MSUnet Guest 3.0

Capture your experience! Tag @msuhealthcare on Twitter and LinkedIn and @patientaccesscollaborative on LinkedIn and @accesspatient on IG to be included in a drawing for fun prizes!

Addresses to Know

The Graduate Hotel – 133 Evergreen Ave, East Lansing, MI 48823
MSU Union - 49 Abbot Rd, East Lansing, MI 48824
Marriot - 300 M. A. C. Ave, East Lansing, MI 48823
Lansing Brewing Company - 518 E Shiawassee St, Lansing, MI 48912
McLaren Hospital Greater Lansing - 2900 Collins Rd, Lansing, MI 48910
University Club of MSU - 3435 Forest Rd, Lansing, MI 48910
Hannah Technology Research Center- 4660 Hagadorn Rd, East Lansing, MI 48823
MSU Kellogg Center - 219 S Harrison Rd, East Lansing, MI 48824

Tuesday, May 9, 2023 | Opening Sessions & Receptions

11:00am - 6:30pm   **Conference Registration:** *Graduate Hotel -- Lobby of the Conference Area (second floor, outside of The Shadows Ballroom). (Hotel room check-in is at 4:00pm). Complimentary Luggage Storage at the Graduate Hotel's Front Desk.*

1:00pm - 4:30pm   **Opening Sessions (Concurrent)**

Session I –Access Journey; *The Graduate Hotel, Shadows Ballroom*

Moderator: Brent Bizwell, Principal, Access Advisors

Speakers: Tracy Fry-Longoria, VP, Ambulatory Care; Brett Butler, Senior Director, Patient Access; HL Walker, Senior Manager, Clinic & Provider Partnerships; Virginia Commonwealth University Health System – *Building an Access Infrastructure – and the Challenges of Maintenance*

Amanda Thompson, HCS Executive Director, and Cassie Miller Georgakopoulos, Director, Outpatient Access Center, UNC Healthcare – *Access Fundamentals*

Session from 1:00pm to 2:15; Break: 2:15 to 2:45 pm; Session continues through 4:15pm

Session II - Children's Hospital Access Collaborative; *The Graduate Hotel, Lemon Tree*

Moderator: Grace Karon, Director, Operations and Strategy, Texas Children's Hospital

1:00pm to 1:30pm -- Grace Karon: *Opening & Introductions; You Want…& I Have…*

1:30pm to 2:00 pm: Rapid Fire Sessions

Chris Morris, Director, Referral and Scheduling, Patient Access Service Center, Zhaoji (Jeremy) Xu, Access Business Manager, Ambulatory Transformation, Stanford Children's Health – *Dynamic Access Dashboard*

Elise Ingram, Director, Ambulatory Operations, Children's Hospital & Medical Center (Omaha) – *Self-Scheduling: Challenges & Opportunities*

2:00pm to 2:15pm: 2023 Survey Data Showcase: Chris Profeta, Director of Research, Patient Access Collaborative

2:15pm to 2:45pm: Break (Drinks, Snacks)

2:45pm to 3:15pm: Erin Schumacher, Director of Operations, Childrens Colorado and Kevin Pawl, Senior Director of Patient Access, Boston Children's Hospital - *Referral Capture*

3:15pm to 4:00pm: Grace Karon, Marc DiFazio, MD, Vice President, Ambulatory Services, Children's National Health System; and Bridget Fredstrom, Manager, IS, Cincinnati Children's Hospital Medical Center - *"Skate to Where the Puck is Going to Be" – Access Goals – and How to Get There: Roundtable Discussion*

4:00pm - Conclusion

Session III – Digital Front Door; *The Graduate Hotel, Kedzie A/B*
Moderator: Roger Jansen, PhD, Chief Digital Health and Innovation Officer, Michigan State University Health
- 1:00pm to 1:25pm: Roger Jansen: *Introduction & Do We* Really *Own the Digital Front Door??*
- 1:25pm to 1:45pm: Laura Marquez, Senior Director of Digital Transformation, University of Utah Health – *Creating a Digital Journey*
- 1:45pm to 2:05pm: Brynn Howard, Operations Administrator and Clay Hatter, Principal Access Advisor, Enterprise Office of Access Management, Mayo Clinic – *Self-Service and Access: A Marriage Made in Heaven*
- 2:05pm to 2:25pm: Denise Davis, Director of Specialty Services, Johns Hopkins University Medicine – *Leveraging AI in the Contact Center*
- 2:25pm to 2:45pm: Tina Ninan, Director, Ambulatory Services, Texas Children's Hospital – *Effective Support Systems for Virtual Care*

2:45pm to 3:10pm – Break (Drinks, Snacks)

3:10pm to 4:30pm: The **Dolphin Tank**: Innovative Ideas to Support Patient Access. Tables are hosted by the speakers.

Session IV – Cancer Center Tour + Access Discussion; *McLaren Hospital, 2900 Collins Rd, Lansing, MI 48910, Room 208 (KCI Tumor Board Room)*. Please meet at 1:00pm *in front of* The Graduate. Attendees will be transported to and from the venue via car service (to return at 4:00pm). Tour guide: Nick Erikson, Regional Director, Cancer Services, Karmanos Cancer Institute at McLaren Greater Lansing

Session V – Executive Roundtable (by invitation); *MSU, The University Club, Fireside Room*
Please meet at 1:00 pm *in front of* The Graduate (via shuttle bus)
Moderator - Seth Ciabotti, Chief Executive Officer at MSU Health Care
- *Kill the Call Center (!?): Strategizing Access for the Future*
- *Overview: the ROI of Access and Access Benchmarks*
Participants will be bused back to the Graduate Hotel at the conclusion of the session

5:00pm to 6:30pm   **New Member Reception, Shadows Ballroom, The Graduate Hotel**
5:00pm to 6:30pm   **Welcome Rooftop Reception, Rock Bar, The Graduate Hotel**

Off-site dinner for Children's Hospital & Cerner attendees to follow.

Wednesday, May 10, 2023 | Morning Workshops

6:45am - 8:00am   **Conference Registration;** *The Graduate Hotel Lobby of the Conference Area (second floor); Desk open through 1:00pm for assistance.*

7:00am - 8:00am   **Breakfast Buffet;** *The Graduate Hotel, Shadows Ballroom*

*__**For Call Center Management Workshop Attendees, please proceed directly to the MSU Union (Third Floor) for your breakfast. **__*

8:00am   **Assemble for Workshops (Walk to MSU Union, Remain at Conference Area, or Shuttle to Tour)**

8:00am - 1:00pm   **Workshops** *(include lunch)*

Ambulatory Operations - **8:00am –** Assemble in front The Graduate Hotel for **8:15am** shuttle to MSU for tour and discussion. Hannah Technology Research Center, Room 518 - 4660 Hagadorn Rd, East Lansing, MI 48823
Leader: Michelle Schotzko, RN, BSN, Director of Practices, MSU Health
Moderator: Yara Davila, MBA, Executive Director, Ambulatory Services, Brigham and Women's Hospital

- **8:45am to 10:00am** – Tour
- **10:00am to 10:20am** - Break
- **10:20am to 10:50am**
  Rapid Fire Session: Sarah Kier, Vice President, Enterprise Patient Access, Emory Healthcare: *The Role of the Access Manager as Access Liaison*
- **10:50am to 12:30pm**: Roundtable Discussion: T*he Impact of RVU Measurement on Access – and Access Standards (The Good, the Bad, & The Ugly!),* includes Lunch
- **12:40pm** – load bus to Kellogg Center

Call Center Management – **Walk from the Graduate Hotel to the MSU Union for your breakfast, which will be served from 7:00am to 8:00am on the Third Floor (service from Lake Erie; seating in Lake Huron).** At 8:00am, the morning lecture series will begin in Lake Huron.
Moderator: Gina Minas, Director, Access, Northwestern Medicine
- **8:00am to 10:10am** – Rapid-Fire Sessions in Best Practices of Contact Center Management
  - 8:00am to 8:10am: Gina Minas: *Introductions & Plan*
  - 8:10am to 8:30am– Chris Profeta, Senior Director of Research, Patient Access Collaborative - *2023 PAC/CHAC Benchmarks for Contact Center Management*
  - 8:30am to 8:50am: Gina Minas, Director, Access, Northwestern Medicine: *Post-Call Survey drives Access Performance Factors*
  - 8:50am to 9:10am: Pam Clark, Director, UAB Health: *Leveraging the Access Center to Support Care Transitions*
  - 9:10am to 9:30am: Michael Hesseltine, Director of Ancillary Services, University of Iowa Patient Access Center: *Training@IOWA*
  - 9:30am: Stretch Break!!!
  - 9:35am to 9:55am: Max Mayo, AVP, Business Strategy, Northwell Health - *Help Me, Help You, Help Me: Getting Granular with Call Center Data to Improve Performance*
  - 9:55am to 10:00am: Gina Minas: *Best Practices: Please Share Yours!*

- **10:00am to 10:30am** – Break

- **10:30am to 12:15pm**– Call Center Speed Dating, Lake Michigan, Lake Erie, MSU Room (all rooms on Third Floor). Look at the back of your badge for your assigned table leader:
  - Arthur Price III - Senior Director, Ambulatory Access & Contact Center Operations, Massachusetts General Hospital
  - Cassie Crary - Supervisor and Troy Thul, Manager, Office of Access Management Support and Coordinator Operations, Mayo Clinic
  - Connie Lee - Operations Director, Patient Communications Center, UCLA Health
  - Jennifer Ward – Director, Access, UT Southwestern Medical Center
  - Kim Morel-Betances - Senior Director, Access Center Services, ColumbiaDoctors
  - Mary Hodgers - Director of Operations, Access Center, Rush University Medical Center
  - John Schultz - Director, Contact Center Operations, Ambulatory Services, Children's National Hospital
  - Jordan Franck - Executive Director Patient Access, Ambulatory Care Division, UC Davis Health
  - Amy Tufano - Director, Patient Access Center, Scheduling & Clinical Intake, Seattle Children's Hospital

- **12:15pm to 12:45pm –** Box Lunch with your round table lunch served in Lake Huron
- **12:45pm** - Walk to Kellogg Center (20 minutes); transportation available upon request.

Capacity Management Kedzie Ballroom, The Graduate Hotel
Moderator: Dan Gregg, Vice President, Access and Capacity Management, USF Tampa General Physicians

  8:00am to 10:30am – Presentations

  8:00am to 8:10pm - Dan Gregg - Kick-off

  8:10am to 9:10 am - Tia Rooney, Director, Ambulatory Operations and Strategic Initiatives and Daniel Harton, Data Analyst Lead, Seattle Children's Hospital: *An Equitable Approach to Reducing Missed Appointments: Ambulatory Predictive Analytics & Care Call*

  David Stolte, Senior Director, Regional Clinics and Urgent Care and Shae Foley, Business Operations Manager, Seattle Children's Hospital: *Room Management and Allocation Strategy*

  9:10am to 9:40am - Aramis Cherrington, Associate Vice President, Patient Access Services, Loma Linda University Health: Telling the *Story* of Access

  9:40am to 10:10am - Donny Nokes, Program Manager, Capacity and Patient Access Center Management, Johns Hopkins Medicine: *Stress Testing: The Next Frontier of Capacity Management Analytics*

  10:10am to 10:30am - Lois Bernhardt, PT, MBOE, Associate Director of Capacity Management, OSU Physicians - *Template Security Survey Findings*

  10:30am to 10:50pm – Break (Medical Directors are excused to move to the Lemon Tree Room)

10:50am to 12:50pm – The "Unconference" Roundtable Discussions (Sustainability: Template Optimization & Security); includes Tetris (why not??) + Lunch (which will be available at 12 noon)

> Roundtable Leaders:
> - Barb Beaudrie, Access Utilization and Capacity Manager, University of Florida Jacksonville Physicians
> - Kimberly Pacheo, Director, Patient Access, University of Utah Health
> - Adam Meyers, Director Access and Capacity Management, Houston Methodist
> - Bill Guptill, Director of Ambulatory Capacity Management & Technology Brigham & Women's Hospital
> - Gina Carilli, Manager of Schedule Optimization, Baystate Medical Practices & Nichole Hawthorne, Manager of Template Management Services, Penn State Health Medical Group
> - Melanie Cassamas, Senior Director, Access & Capacity Management, Mass General Brigham
> - Andrew Smith, VP, Access Services, Medical Group, Baylor Scott & White
> - Craig Ariano, Director of Business Analytics, Weill Cornell Medicine Physician Organization
> - Hitan Kamdar, Executive Director, George Washington University Medical Faculty Associates
> - Adrin Mammen, VP & Chief, Ambulatory Patient Access, Mount Sinai Doctors Faculty Practice

> **12:50pm** - Shuttle to Kellogg Center (meet in front of The Graduate Hotel) -- or walk

<mark>Medical Directors</mark> – Attend first segment of one of the sessions above, then assemble after the break for discussion + lunch – *Lemon Tree Room, The Graduate Hotel*
Moderator: Shivani Scharf, DO, Medical Director, University of Kansas Medical Center

- **10:45am to 1:00pm** – Shivani Scharf, DO - Discussion
  - The Role of the Medical Director
    - Job description
    - Reporting; Organizational structure
    - Dyad/Triad structure
    - Leading through fatigue: in-basket messaging; pajama time; productivity pressures, insatiable demand... and burn-out
  - In Defense of Access
    - The value (or not) of Service Level Agreements
    - Intersection of patient safety
    - Return on investment analysis
    - Leaning into benchmarking data

- **1:00pm** – Shuttle to Kellogg Center (meet in front of The Graduate Hotel) -- or walk

Wednesday, May 10, 2023 | Afternoon Showcase & Reception

1:00pm to 2:00pm   **Cookies, Coffee & Conversation**, *MSU Kellogg Center Central Lobby,* 219 S Harrison Rd, East Lansing, MI

2:00pm to 4:00pm   **Access Showcase –** *MSU Kellogg Center Auditorium, MSU*

Welcome and Introductions
- 2:00pm to 2:05pm: Elizabeth Woodcock, Executive Director, Patient Access Collaborative
- 2:05pm to 2:20pm: Seth Ciabotti, CEO, MSU Health Care: The Evolution of Access
- 2:20pm to 2:40: Kris Allen, RN, CNO, MSU Health Care: Value Proposition of Capacity Analytics
- 2:40pm to 3:00pm: Ceirra Hoch, Director of Projects, and Michael Weiner, DO, Chief Medical Officer, MSU Health Care: Constructing Relationships to Improve Access to Services
- 3:00pm to 3:20pm: Robert Barto, Assistant Director of Health IT, MSU Health Care: Leveraging RPA
- 3:20pm to 3:50pm: Nate Fitton, DO, CMIO, Kris Allen, RN, CNO, Michelle Schotzko, RN, BSN, Director of Practices, and Robert Barto, Assistant Director of Health IT. MSU Health Care: The Journey to Self-Automation
- 3:50pm to 4:00pm: Seth Ciabotti, CEO, MSU Health Care: Conclusion

4:00pm to 6:00pm   **BREAK** (Bus available beginning at 4:00pm [rotating] back to Graduate Hotel)

6:00pm to 8:00pm   **Reception Sponsored by MSU Health** *Lansing Brewing Company (518 E. Shiawassee Street, Lansing)*
Drinks and dinner will be served. Buses will begin promptly at 5:45pm, loading at the front of the Graduate Hotel. Return bus will begin at 7:00pm.

Thursday, May 11, 2023 | Main Symposium

6:00am - 12:00pm   **Conference Support Desk Open, MSU Union & The Graduate Hotel (hotel lobby)**
Hotel check-out is 11:00am; Luggage Storage is Available at the Graduate and the MSU Union.

7:00am to 8:00am   **Breakfast Buffet;** *Ballroom, MSU Union Second Floor*

8:00am to 12:00pm   **Main Symposium,** *Ballroom, MSU Union Second Floor*

8:00 to 8:30am - Elizabeth Woodcock, Executive Director, Patient Access Collaborative - *Welcome, Introduction and Benchmarking Survey Results*

8:30am to 9:00am - Jennifer Perkins, MD, MBA, Ambulatory Executive Medical Director, UCSF Health - *How to Move an (Access) Mountain*

9:00am to 9:30am -- Rick Evans, Senior Vice President and Chief Experience Officer, NewYork Presbyterian Hospitals – *Merging Access + Experience*

9:30am to 10:00am – Victor Hassid, MD, Executive Medical Director, Access Strategic Operations, MD Anderson Cancer Center - *High Reliability Organization Journey in Healthcare – Is it just about Patient Safety?*

10:00am to 10:30am – Break

10:30am to 11:00am – Linda Nguyen, MD, Clinic Chief, Digestive Health Center, and Rebecca Carey, Administrative Director, Patient Journey Optimization, Stanford Health Care - *Pre-Visit Experience Transformation: Engaging providers, care teams, and patients in improvement at scale*

11:00am to 11:30am - Kelly Turner, VP, Patient Access Services, and Marc Cohen, MD, Medical Director, Memorial Sloan Kettering – *Leveraging Access to Solve System Volume Challenges*

11:30am to 12:00pm - Elsa Jacobson, Executive Director Access Transformation, and Dawn Colwell, Senior Director, Access, Cleveland Clinic – *The Value of (True) Patient-Centered Access*

12:00pm - 12:10pm   **Wrap Up**

12:20pm   **Assemble in Graduate Hotel Lobby for Shuttle departure at 12:30pm to** <u>Lansing airport</u> **(reservation required)**

Restaurants/Bars

Jolly Pumpkin- 218 Albert St, East Lansing, MI 48823
HopCat- 300 Grove St, East Lansing, MI 48823
Barrio- 202 Albert St, East Lansing, MI 48823

Field House – 213 Ann Street, East Lansing, MI 48823
Beggar's Banquet- 218 Abbot Rd, East Lansing, MI 48823
State Room Restaurant- 219 S Harrison Rd. East Lansing. MI 48824

Thank You to Our AMAZING Host