Electronic Check-In Project
An Example of a Quality Improvement Project

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Roadmap for this presentation

- Local Agency Background
- CQI Framework
  - Quality Improvement (QI) using Action Research
  - QI as distinct from Quality Assurance (QA)
- Share example of QI within our Agency
  - Electronic Check-In Project (E-CIP)
    - Inception of Project
    - Objectives of Project
    - Process & Progress
    - Lessons Learned
    - Future Directions
- How E-CIP exemplifies key characteristics of CQI
Our Local Agency

We serve approximately 40,000 participants monthly

We have 11 WIC sites throughout San Diego County
Continuous Quality Improvement (CQI)

What is it?

How does it fit within WIC?

How does it differ from Quality Assurance (QA)?
We have guidelines from FNS/USDA of August 2013 to help with this question.
Continuous Quality Improvement

“Standard 16 - Quality Improvement
The State and Local Agency engage in ongoing Quality Improvement (QI) to continuously improve staff procedures and the nutrition services participants receive.”

FNS/USDA Nutrition Service Standards, August 2013
Measurement & Monitoring

QA answers a **closed-ended question**
with one of two options: yes/no; pass/fail; meets expectations/does not meet expectations, etc.

Improvement

QI answers an **open-ended question**
such as: “How can we improve our services?” or “How can ‘x’ process be more efficient?”
Quality Improvement (QI)

- How can we improve what we are doing?
  - Reflection/Planning
- Take Action
  - Observe/Examine
- What does it look like after “the improvement”? 
  - Assessment
Action Research Model

Reflect
Challenges?

Evaluate
What Happened?

Act
Try something different
Action Research Model

+ Quality Improvement Project

= E-CIP

Electronic Check-In Project
Inception of E-CIP

Reflect
Challenges?

E-CIP

Evaluate
What happened?

Act
Try something different

Act
Reflect
Evaluate

Reflect
Act
Evaluate

E-CIP
What is Academy for Participant-Centered Leadership?

A California State WIC Program
5 years, beginning 2010 through 2014
Reflect

Through APL we were able to reflect on challenges:

- select an area for a Quality Improvement effort

- identify specific challenges and objectives
We went to the Site Staff Teams to listen to their challenges

**First Question** - What would they like to know from the participants?

“Do they know what to do when they first come in?”

**Discussion ensued . . .**

Actually, the sense was that they do know what to do, they just don’t want to . . .

**For example**, frequently, they will “jump the line” to say, I just have a question . . .
As we listened, a picture developed

Direct Service Delivery Staff feel pressure and at times Participants express impatience or frustration

Experienced as time crunch for both staff and participants
Progression to Problem-Solving

What about additional signage?
  ▶ Suggesting Courtesy
  ▶ Providing Directions

▶ No, we have it and when impatience or frustration arise, signs aren’t calming

Someone said, “What about Electronic Check-In?”

A Spontaneous Suggestion for Innovation
Objectives of the Electronic Check-In Project

a. to improve the quality of support provided to direct service delivery staff
b. to engage the expertise of direct service delivery staff
c. to improve participant satisfaction with WIC visit
d. to improve ability of staff to meet participant needs efficiently
e. to reduce staff burden and participant frustration and stress of both.
Moving to Action

- **Secure Funding**
  - APL Project Budget
  - Equipment $6,000

- **Acquire Equipment**
  - Microsoft Surface 3 Tablet
    - $499.00 + tax (currently)
  - Security Mounts
    - $129.00 + tax (currently)
Planning & Process
Series of Collaborative Work Sessions: Portion of Regularly Schedule Meetings

- Rich discussion considering wide-range of options for use:
  - For Walk-Ins
  - For Bottlenecks
    - For example: Processing before Class times
    - For all participants as they arrive at WIC site

- Considered & Discussed
  - potential barriers, obstacles
  - opportunities, benefits to use
Reflect on discussions

- Decided to pilot use of the Electronic Check-In for
  - All participants upon arrival

- Selected specific objectives for the first pilot
- Developed trial flow of Check-In Screens/Questions
- Selected first two WIC sites for pilot testing
Round I - Electronic Check-In Pilot

Will be testing two aspects:

- A “virtual queue” for all Participants arriving at WIC site

- A “strategy tool” for all Site Staff - get an overview of who is waiting for what reason
Intentions

➢ A “virtual queue” for all Participants arriving at WIC site
  
  queue up - form a queue, form a line, stand in line;

➢ A “strategy tool” for all Site Staff - get an overview of who is waiting for what reason

  Manage the queue with greater efficiency and effectiveness while improving the customer experience.
Possible Advantages

- Improve Fairness ~ Virtual Queue
- Improve Efficiency ~ Strategy Tool
- Reduce Wait Time
- Reduce Staff Stress
- Improve Participant Satisfaction
- Improve Participant Perception of Fairness
- Reduce Participant Stress
Piloting & Progress
Early Piloting Steps:
preparing for actual use with participants

Worked with a wide-range of WIC staff to:

- Figure out set-up - physical and electronic arrangement of equipment
- Design flow of Check-In Screens/Questions developed for initial pilot
- Give staff opportunity to try it out and give input on all aspects
- Consider ideas for using information resulting from Check-In Screens
- Consider schedule and location for initial pilot testing with actual participants at the sites
Use of Electronic Check-In at the Site
Overview of Basic Flow of Questions on Check-In Screen

Welcome Name and ID or Phone

Appointment?

Yes

Wait?

No

Schedule Appt.?
WELCOME - We are happy to see you!
BIENVENIDOS - ¡Estamos felices de verte!

Name / Nombre

Please enter your WIC Family ID / ¿Cual es tu número de identificación familiar de WIC?

Or phone number with area code / ó número de teléfono con código de área?

Do you have an appointment today? / ¿Tiene una cita hoy?
○ Yes / Sí
○ No / No
Do you have an appointment today? / ¿Tiene una cita hoy?
- Yes / Sí
- No / No

What do you prefer? / ¿Cuál es su preferencia?
- Wait until a WIC Counselor is available to meet with you? / Esperar hasta que un Consejera de WIC esté disponible?
- Schedule an appointment. / Programar una cita.
Welcome to WIC! / ¡Bienvenidos a WIC!

Thank you for checking in! We will assist you as soon as possible.

Gracias! Estaremos encantados de ayudarle tan pronto como sea posible.
Set up Check-In Screens using Google Forms
Google Sheets - Landing Spot for each Check-In submission

<table>
<thead>
<tr>
<th>Timestamp</th>
<th>Name / Nombre</th>
<th>Please enter your WIC F: Or phone number with area code. Do you have an appointment? What do you prefer? / ¿Cuál es su preferencia?</th>
</tr>
</thead>
<tbody>
<tr>
<td>5/11/2015 12:09:54</td>
<td>wendy wc</td>
<td>Yes/ SI</td>
</tr>
<tr>
<td>5/11/2015 12:11:03</td>
<td>susy wc</td>
<td>No/ No</td>
</tr>
<tr>
<td>5/11/2015 12:18:30</td>
<td>Test</td>
<td>Schedule an appointment / Programar una cita.</td>
</tr>
<tr>
<td>5/11/2015 12:20:06</td>
<td>Test2</td>
<td>No/ No</td>
</tr>
<tr>
<td></td>
<td>Test</td>
<td>Wait to talk with someone / Espera hablar con alguien.</td>
</tr>
</tbody>
</table>
Use of Electronic Check-In at the Site
How do the Staff access and use the information entered by the Participant?
Evaluate ➔ Improve Office Flow
Reduce Pressure
Staff
Participants

- Improve Fairness ➔ Virtual Queue
- Improve Efficiency ➔ Strategy Tool
  - Reduce Wait Time
  - Reduce Staff Stress
  - Improve Participant Satisfaction
  - Improve Participant Perception of Fairness
  - Reduce Participant Stress
What Participants have to say about the Electronic Check-In System
What WIC Staff have to say about the Electronic Check-In System
Evaluate:
Taking a Closer Look at Assessment and Evaluation during the Pilot Phase

Requires careful balance between:

- Planning
- Flexibility

- Some adjustments are rapid
  - Examples
    - Specific Text and Flow of Screens
    - Location & Securing Equipment

- Some require greater consideration

- Some require measurement
  - Ex- Office flow
  - Participant perception
  - Staff perception

Allows use of On-Site Expertise
WELCOME - We are happy to see you!
BIENVENIDOS - ¡Estamos felices de verte!

Name / Nombre

Please enter your WIC Family ID / ¿Cuál es tu número de identificación familiar de WIC?

Or phone number with area code / ¿O número de teléfono con código de área?
Do you have an appointment today? / ¿Tiene una cita hoy?

- Yes / Sí
- No / No
Example of Flexibility and Simplification

Initial Screen Sequence
(as many as 7 steps)

Welcome → ID or Phone # → Appointment? → Yes/No
- Yes: Folder? → Yes/No
- Yes: Into Basket, Please take seat
- No: Schedule Appt.
- No: Question/Other

Rewarded Screen Sequence
(3 to 4 steps)

Welcome Name and ID or Phone → Appointment? → Yes/No
- Yes: Please take seat
- No: Wait?
- No: Schedule Appt.? → Thank you, Serve ASAP
A few lessons learned so far . . .

» Site physical set up comes with unique issues

» Different Sites have differing:
  » Ideas
  » Opinions
  » Preferences
  » Team approaches to communication
  » “time needed to consider”

» Need to encourage “problem identification”

» Onsite Adjustments help with “engagement as experts”

» There is excitement with this type of innovation
Salmon Slip Baseline Measurement

Measure “Office Flow”

Reduce Wait Time Improve Efficiency
Baseline Measurement

<table>
<thead>
<tr>
<th>WIC Participant Visit</th>
</tr>
</thead>
<tbody>
<tr>
<td>Date: ______</td>
</tr>
<tr>
<td>Reason for Visit: ______</td>
</tr>
<tr>
<td>☐ Appointment Time ______</td>
</tr>
<tr>
<td>☐ Walk-in Scheduled</td>
</tr>
<tr>
<td>☐ Walk-in without Arrangement</td>
</tr>
<tr>
<td>WIC Family ID: ______</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Please enter begin and end times &amp; check off items that happen during ppt's visit</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Initial WIF</strong></td>
</tr>
<tr>
<td>Processing:</td>
</tr>
<tr>
<td>☐ Ht &amp; Wt</td>
</tr>
<tr>
<td>☐ Pronto</td>
</tr>
<tr>
<td>☐ NQ (pre-filled by ppt.)</td>
</tr>
<tr>
<td>☐ NQ (waiting room by ppt.)</td>
</tr>
<tr>
<td>Nutrition Ed.</td>
</tr>
<tr>
<td>☐ Class (onsite)</td>
</tr>
<tr>
<td>☐ Online (onsite)</td>
</tr>
<tr>
<td>☐ Online (before WIC visit)</td>
</tr>
<tr>
<td>Counseling:</td>
</tr>
<tr>
<td>☐ Ht &amp; Wt</td>
</tr>
<tr>
<td>☐ Pronto</td>
</tr>
<tr>
<td>☐ Class (at desk)</td>
</tr>
<tr>
<td>Finishes WIC Visit:</td>
</tr>
<tr>
<td>☐ Receives Vouchers</td>
</tr>
<tr>
<td>begin</td>
</tr>
<tr>
<td>exit time</td>
</tr>
</tbody>
</table>
Now and going forward in Pilot Phase

Develop
- Southeast
- Escondido

Test
- 2 North sites
- 2 South sites

Assess Use
- Consider alternative Uses?
- Select “Queuing/Strategy Use?”

Pilot Equipment,
Screens,
Measurement Questions

Additional Baseline Measurement
Progress... through an Action Research Process

Assess Problems → Ideas

Reflect
- APL Assessment
- Listening Session

Act
- Secure Funding
- Acquire Equipment

Evaluate
- Pilot with Staff
- Pilot at Site & Revise

Reflect
- Reflect
- Ideas → Potential Actions

Act
- Act
- Potential Actions → Pilot

Evaluate
- Evaluate
- Reflect
- Act
- Evaluate
Key Characteristics

Successful CQI Process

- Collaborate
- Investigate
- Innovate
- Consider Evidence
- Persevere
Key Characteristics exemplified in E-CIP Successful CQI Process

Collaborate
  Site Staff are Experts

Investigate
  Admin facilitates

Innovate
  Focus, Reflect, & Follow Through

Consider Evidence
  Measure & Examine

Persevere
  Problem-Solve
Electronic Check-In Project

An Example of a Quality Improvement Project

As they say at NWA... It takes a Village... Here is our Village!