1. **Objective #1 Analyze Workflow State**
   - Is Nurse Triage the only issue you would like for this engagement to address or is there a larger patient access initiative contemplated that will have the results of this engagement incorporated into? **Yes**
   - What telephone/IT solution is utilized for current inbound call management by location? **Epic**
   - What is the current call response model by location? **Decentralized**
   - What documentation system/solution is currently used to capture message intake, and call response/triage? **Epic**

2. **Objective #2 Review Current Standing Orders**
   - Are the clinics currently using national, regional, health system or individual clinic created triage protocols? **National, need to develop custom for specialties**
   - Do the physician/providers feel there is a need to standardizing the triage process in order meet quality benchmarks and patient satisfaction objectives? **No**

3. **Objective #3 Develop a standardized triage workflow model**
   - Does the current technology infrastructure meet call demands? **Yes**
   - Does the current technology allow for productivity reporting? **It can, but currently not implemented**
   - What is the current new hire training process for triage and other front desk staff? **Centralized**

4. **Objective #4 Benchmark Key Operating Metrics**
   - What are the current key operating metrics being measured? **Total response time between a Mychart message/Telephone call coming in and when it’s closed: Total time to read a Mychart message, Total time to close a telephone encounter**
   - Is benchmark data shared with site management and staff? **Yes**

5. **Objective #5 Develop standardized nurse triage model implementation plan**
   - Is a centralized or decentralized model preferred? **Neutral**
   - Is there a preference in doing this work internally or would an outsourced solution work? **Neutral**
   - Will this model include the development of clinical protocols to meet best practice standards by specialty area? **Yes**

6. What is the current ambulatory staffing model and team based care structure used by the ambulatory clinics?
   - What is the current staffing model planning tool used by UTSW for the Ambulatory Clinics? **Decentralized**
   - Is there a common care team model for medical assistant through advanced practice provider staffing? **In process**
   - Are Resident training opportunities are included in this review? **No**
   - Who is the employer for staff in each clinic? **Department**
   - What is the management structure for the Ambulatory clinics including faculty, administrative and other clinical staff? **Department-based**

7. What policies and processes (including management metrics) are used now and how are they reported and reviewed? **Several different methods, would like to standardize**
8. Does the practice participate in collecting patient engagement and physician satisfaction information like CG CAHPS or other quality and engagement metrics? Yes
9. Are clinical trials and other translational research related patient services included in this request? If so, what policies and processes govern patient engagement? No
10. Are PeriOp activities (surgical schedule coordination workflow, ancillary work flow, etc.) included in the deliverables? No
11. Is service coding and related patient documentation included as part of the work flow and messaging review? No
12. Is insurance company service authorization and related activity to be included in the work flow? No
13. Is there a common access center for incoming and outbound patient calls related to appointment availability, billing and collections issues and clinical support issues related to patient engagement and clinical care? Mixture, available for some clinics, and available for new patients
14. Is Epic's Nurse Triage currently live, or are there future plans to implement the Nurse Triage product? Yes
15. Is the intended scope focused on triaging calls/MyChart that need clinical input for appointment urgency decisions (“I have this problem and I am not sure if I need to see a doctor” or “I have this symptom and need an appointment – maybe with urgency”) vs. a broader view of other clinical calls / MyChart response that clinicians are involved in that may be focused on at home symptom management, post-op patient questions, follow-up calls after diagnostic testing with instructions for patient next steps, prescription refills, etc. Yes to both
16. What telephone system is used to receive calls for patient appointment scheduling and nurse triage in the ambulatory clinics? NA
17. Clarification on EMR - Are all of your clinics on Epic? If not, please provide a breakdown by system. Yes
18. Due date of RFP is 04/01 as per cover page and section 2.4. The RFP was updated on the website earlier this week.