1. Support Services Report Template

Report Info
Name of the person completing this report: Gail Erickson
Supervisor/dean reviewing report: Andrea Wilson
Name of second reviewer (if necessary): Brad Wells
Service: SHCS - Medical Records
Division/College: Administration and Finance
Title of the person completing this report: Supervisor, Medical Records

3. Mandated Service

Link to Scoring Rubric

1.1 Please indicate below if any aspect of the service is legally mandated by any of the following and provide the relevant reference.

Executive Order: 943 & 1053

Provide a brief explanation, if necessary, in < 60 words.

EO 877 covers the CSU responsibility to the Health Information Portability and Accountability Act. SHCS Medical Record department every effort to maintain all aspects of HIPAA compliance.

4. Importance of Service

Briefly describe the service in terms of its primary function(s) and purpose(s) using <120 words

Provide onset of physical and mental health services to students:
* Educate students on health care systems and processes. Assess the urgency of medical and mental health needs of students. Determine eligibility, make appointments, mediate communication between clinicians, counselors, outside service providers and patients.
* Initiate and maintain patient’s highly confidential and sensitive medical and legal documents. Release records as lawfully permitted for continuity of care and legal subpoenas.
* Monitor University required immunizations as mandated by EO 803.
* Coordinate internal clinics and outside referrals for students needing specialized care/services.
* Manage on-campus clinics for special programs, (ALP, Athletics, etc.)
* Determine insurance eligibility and classification for charging purposes to generate funding, (Worker Comp, Family PACT, etc.)

Link to Scoring Rubric

2.1 Who are the primary receivers of this service? (Please enter the percentage of each user group that is relevant)

Faculty: 1%
Administrators/staff: 1%
Students: 98%
Total: 100%

Link to Scoring Rubric

2.2 Please indicate the direct or indirect impact of the service on students for each of the three University Action/Student
Impact Areas listed below (for example, processing financial aid applications would be direct impact on students while managing utility services would be indirect).

<table>
<thead>
<tr>
<th></th>
<th>Direct Impact on Students</th>
<th>Indirect Impact on Students</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pre-college (helping students to enter the system)</td>
<td>✓</td>
<td></td>
</tr>
<tr>
<td>During college (helping students succeed while they are at Cal State East Bay)</td>
<td>✓</td>
<td></td>
</tr>
<tr>
<td>After college (helping students establish meaningful lifework and be socially responsible contributors to society)</td>
<td>✓</td>
<td></td>
</tr>
</tbody>
</table>

Provide a brief narrative (<60 words each) explaining your selection for each area.

<table>
<thead>
<tr>
<th>Area</th>
<th>Evidence submitted to support the chosen selection (&lt;60 words for each)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pre-college (helping students to enter the system)</td>
<td>1. Assist future students in meeting University immunization pre-admission requirements. E.O.803 2. Administer incoming athletes Dept required pre-admission physicals/labs 3. Complete incoming ALP students University required Tuberculosis screening. 4. Provide first aid for special programs that are designed to develop future enrollment such as Early Start, Summer Bridge, etc.</td>
</tr>
<tr>
<td>During college (helping students succeed while they are at Cal State East Bay)</td>
<td>Helping students maintain optimal physical and mental health in order to complete their educational goals.</td>
</tr>
<tr>
<td>After college (helping students establish meaningful lifework and be socially responsible contributors to society)</td>
<td>Educate students to begin to navigate the health care system.</td>
</tr>
</tbody>
</table>

Provide a brief narrative (<60 words each) explaining your choice.

<table>
<thead>
<tr>
<th>Area</th>
<th>Evidence submitted to support the chosen selection (&lt;60 words for each selection)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pre-college (helping students to enter the system)</td>
<td>Immunizations requirements and international students’ Tuberculosis screening requirements are intended to be met before students can begin classes. Forms for the requirement go out with admission packages and immunizations are listed on students “to do” requirements in MyCSUEB.</td>
</tr>
<tr>
<td>During college (helping students succeed while they are at Cal State East Bay)</td>
<td>Annual system wide Patient Satisfaction Survey results for Q7. How important is it for you to have health services available for you on campus? 2011 100% answered Important to</td>
</tr>
<tr>
<td>After college (helping students establish meaningful lifework and be socially responsible contributors to society)</td>
<td>We help teach students how to define their medical and mental health needs, how to use services optimally, how providers can service them, how to deal with their expenses, and more both while they are here and for future use outside SHCS.</td>
</tr>
</tbody>
</table>

### 2.4 Alignment with Shared Strategic Commitments

**How does this service contribute to or align with any** of the eight Shared Strategic Commitments (SSC) listed below?

| Reinforce academic quality through open-minded inquiry, innovative teaching, engaged learning, and distinguished scholarship | If aligned or contributing, provide a description. (<60 words for each SSC) |
| Enhance our inclusive campus, responding to the backgrounds and interests of our diverse community and promoting their academic, professional and personal development | We contribute to students’ academic and personal development by initiating counseling and medical services/appts. that enhance their physical and mental health. |
| Serve students first, by expanding access and enhancing each student’s educational experience and prospects for success as a graduate and life-long learner | Each students’ educational experience and future success will be most favorably met if their health needs are met. |
| Foster a vibrant community through enriched student services and student life that support student engagement and learning | |
| Contribute to a sustainable planet through our academic programs, university operations, and individual behavior | We eliminated paper records by going to Electronic Medical/Health Records. |
| Continuously improve our efficiency, transparency, and accountability while practicing mutual respect, responsiveness, and collaboration across the University | We work collaboratively with the American Language Program, Athletics, Accessibility Services and other departments to meet the needs of their program’s students. |
| Support the civic, cultural, and economic life of all communities in the regions we serve through partnerships that promote education and social responsibility | |
| Demonstrate our continuing record of leadership and innovation in higher education, focused on 21st century skills, including science, technology, engineering, and mathematics (STEM) | |

### 2.5 How might the demand for this service change over the next five years? (Please choose one category below).

**Likely to increase**

**Provide a rationale for your choice (assumptions, impact of new policy, etc.) in <120 words.**

1. As the University increases enrollment and special academic programs (i.e. new certificate, on-line, graduate programs etc.) the use of our services will increase.
2. The University Campus Services survey rated SHCS as the 4th most important service on campus.
3. The CSU annual systemwide survey for Student Health Services reports that 100% of the East Bay students surveyed rated having health services on campus as important to extremely important. Important-3%; Very Important-13%; Extremely Important-84% No one rated the service as not important at all or even somewhat unimportant.

### 5. Quality of Service
3.1 Do you assess the quality of the service you provide?
Yes

If “Yes”, what benchmarks, best practices or measures of success, either internal or external, do you use to measure service quality (e.g., timeliness, accuracy, adequacy, meeting deadlines, satisfactory completion of assignment, etc.)? Please describe in <120 words. If no, please explain.

1. Annual CSU Systemwide Patient Satisfaction Survey rates the satisfaction with service of each department as well as overall satisfaction of the student.
2. Patient Feedback Forms are available in SHCS building and on website for students to assess their experience and voice their opinions.
3. AAAHC Accreditation Survey.

3.2 During the last three years, have you adopted any measures to improve the quality of this service? Please describe in <120 words.

1. Front Desk modified twice to increase confidentiality for students.
2. Software upgrades allows staff to view schedules without names.
3. Policy enforced that eliminated unsecured emails to patients and compelled staff to use only secure messaging within the software.
4. Implemented additional aspects of electronic medical records.
5. Began Quality Improvement studies within MR Dept.

3.3 What idea(s) do you have for improving the quality of this service within existing resources (e.g. development of benchmarks, surveys, feedback, etc.)? Please describe your plan(s) in <120 words.

1. Implement take a number system to avoid students standing in line and increase privacy
2. Increase psychiatric services (in process)
3. Implement a peer review process
4. Have a dedicated Family PACT staff position
5. Implement new pay for service policy that decreases payment follow up (collections)

3.4 What ideas do you have for improving the quality of the service if additional resources were provided. Please describe your idea(s) in <120 words.

1. Loud speaker or other functional system for communication within the building to improve response time in both medical and mental health urgent situations.

3.5 Do you use any formal or informal process to assess the level of satisfaction of the service users?
Yes

If yes, describe the process and most recent results in <120 words. If no, please explain.

CSU Systemwide Patient Satisfaction Survey. East Bay respondents to Q3. How would you rate the care and service provided
3.6 The university recently conducted a customer satisfaction survey for some services (results for this service are attached, if applicable). Do you have any comment or response to the results? Please describe in <120 words.

SHCS was rated #1 in quality of service and #4 in importance of service. When a student gets sick or injured, we become #1 in importance at that moment.

3.7 Do you have any formal or informal guidelines for personnel in your department regarding how to treat/interact with receivers of this service?

Yes

Every customer, internal as well as external, must be treated with respect, sensitivity, privacy and exclusivity (undivided attention).

3.8 Does your service have annual goals (targets) of achievement regarding the quality of the service provided?

Yes

1. To receive a rating of 95% or better in the good to excellent ratings on the CSU Patient Satisfaction Survey in the category of care and service.

   Our 2013 rating was 100%.

2. Maintain the rating of Substantial Compliance on all measures on the AAAHC Accreditation Survey.

   2012 ratings for Chapter 6 "Clinical Records and Health Information" were 100% Substantially Compliant.

3.9 Does your service have annual goals (targets) of achievement regarding the quantity of service provided?

No

Though we do not quantify goals, we monitor monthly (within SHCS), quarterly (within SHCS) and annually (CSU benchmarking as well as internally) numbers pertaining to each service offered.
6. Efficiency of Service (cost effectiveness)

4.1 Using the spreadsheet provided for all employees in your department, please distribute salaries of individuals across all services provided to reach an educated or reasonable estimate of the cost of providing the service.

302520

Attach your allocated spreadsheet here.

Student Health Svc 2011-12 Expenses Reviewed 08-19-13.xlsx

4.2 Using the spreadsheet provided, please distribute your department’s annual operating expenses across all services provided to reach an educated or reasonable estimate of the cost of providing the service.

30315

4.3 Using the spreadsheet provided, please distribute the square footage of work space across all services provided to reach an educated or reasonable estimate of the use of this resource.

1636

Attach your allocated spreadsheet here.

Space AF Stud Health Reviewed 08-19-13.xlsx

4.4 During the last three years, have you adopted any measures to improve the efficiency (cost effectiveness) of providing this service (e.g. reducing salary costs, operating expenses or use of space, or increased output without increasing cost. Etc.)?

Yes

If yes, please describe the measures in <120 words. If this is a new service introduced over the past three years, please indicate. If no, please explain.

1. Merged the medical and counseling departments into one. Streamlined processes, eliminated counseling administrative assistant position along with all duplication of activities. All Counseling reception, records, telephone services, etc. functions absorbed by Medical Records.
2. Improved Family PACT enrollment/recertification process to increase revenue.
3. Fully implemented self-check in (Hayward and Concord campus) and on-line student health.

4.5 What idea(s) do you have for improving the efficiency (cost effectiveness) of this service within existing resources (e.g. restructuring, merging, outsourcing, ways to cut costs, technology, etc.)? Please describe those ideas in <120 words.

Implement telephone tree/vine system.
4.6 What idea(s) do you have for improving the efficiency (cost effectiveness) of the service if additional resources were provided. Please describe your idea(s) in <120 words.

1. Dedicate a staff person to Family PACT to enroll and orient students, and complete a Superbill for orientation billing purposes. Included would be a remodel of the back office to include a private area for students to be educated and apply for FP eliminating any interactions regarding the service from the lobby area.
2. Have a staff person to work part time 5 days a week instead of sharing a full time person with nursing.
3. Implement a pull-a-number system to increase confidentiality at the front desk by eliminating students standing in line in view and hearing distance of the students being served.

4.7 Do you have any plan(s) to improve the efficiency (cost effectiveness) of this service in the next 1-2 years (e.g. reducing costs, increasing productivity, etc.)?

Yes

If yes, please specify whether these plan(s) involve reducing salary costs, operating expenses and/or use of space. Please describe your plan(s) in <120 words. If no, please explain.

Eliminate taking cash and check payments at front desk which will eliminate daily deposit function and collections process from students who don’t pay at time of service. (in process)

4.8 Please describe the estimated output for this service for fiscal year 2011-12, quantify if possible (e.g. volume, service tickets resolved, people serviced, appointments, etc.) in <120 words.

SHCS served 16,630 patients with appointments in practitioner clinics, not including the number of students seen in the allied services, specifically lab, radiology, and pharmacy. We have no tracking mechanism for phone calls taken and made, nor for messages taken; however, we serve as operator for the entire clinic. The Medical Record department touches each and every one of these students records, along with the records of each patient seen in the previous 10th year (2002) for purging purposes. We enrolled over 1600 students into the Family PACT program.

7. Other

5.1 Are you aware of services similar to this one that are being provided by another department at CSU East Bay?

No

If yes, please provide a list of those departments. How are the services described here similar or different? Please describe in <60 words.

5.2 Is there anything unique or distinctive about your service? Please describe what is unique or distinctive in <120 words.

There is no other student medical or personal counseling service on campus.
5.3 Are there any additional things about this service that you would like the task group to know? Please describe/explain in <250 words.

1. Chapter 6, Clinical Records and Health Information, of the AAAHC Accreditation Survey is devoted strictly to rating the execution of the requirements of Medical Records. Our department has a direct affect on sections of at least 6 other chapters of the Survey. Medical Records rated 100% Substantially Compliant on every rated point of Chapter 6 along with 100% Substantially Compliant on each and every point on which we integrally affect other chapters.

2. The annual CSU system wide Patient Satisfaction Survey ratings:
   A. Reception/MR Care and Service: 100% Good to Very Good ~ 8% Good, 22% Very Good, 70% Excellent
   B. Importance of Service on Campus: 100% Important to Extremely Important ~ 3% Important, 13% Very Important, 83% Extremely Important
   C. SHS Overall Satisfaction: 98% Satisfied to Extremely Satisfied ~ 30% Satisfied, 32% Very Satisfied, 36% Extremely Satisfied