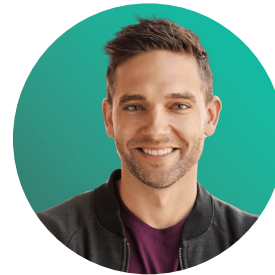


# Streamlining Your Occ Med Process

Lessons Learned From East County Urgent Care

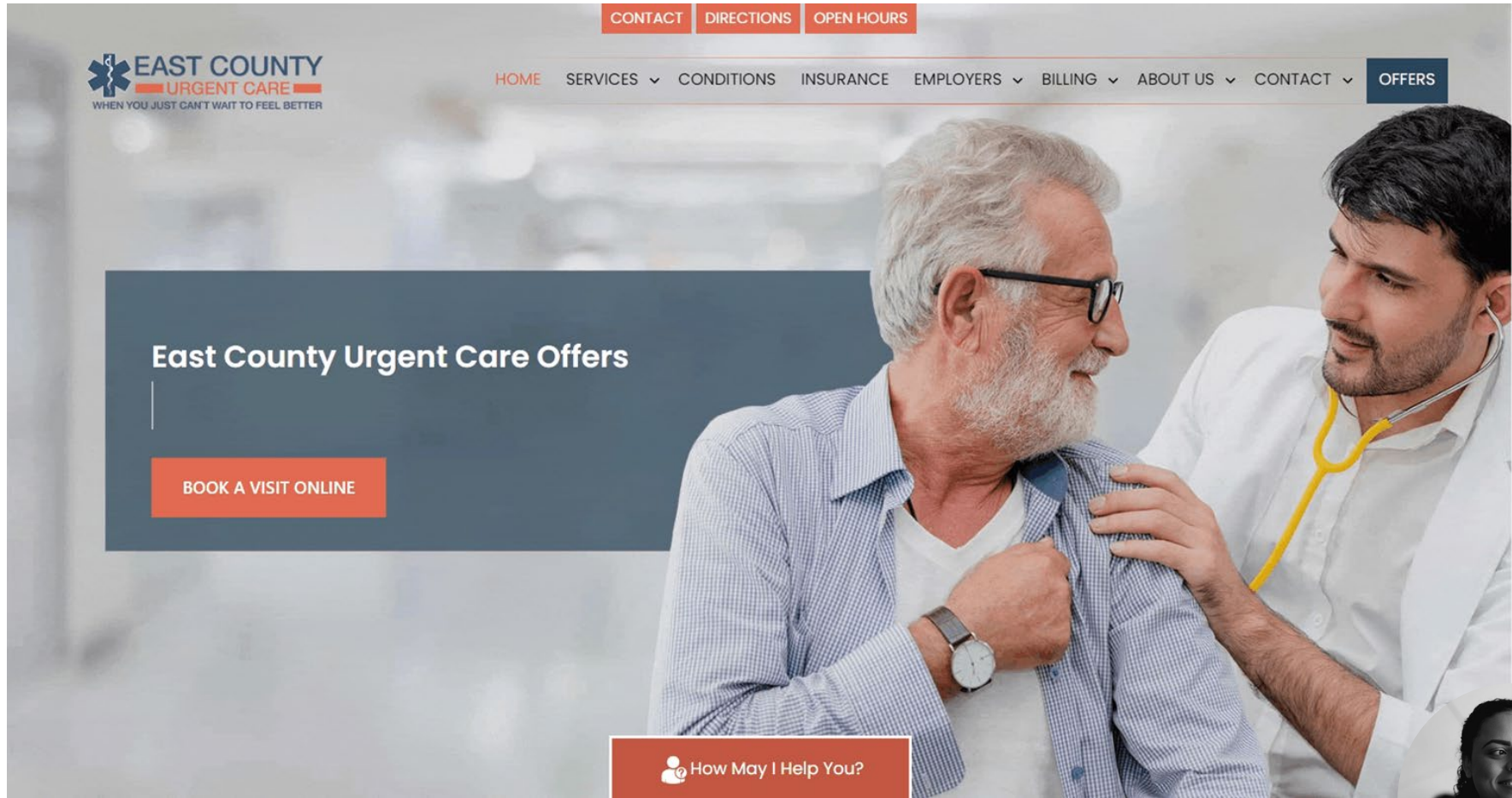


**Jackie Williams**  
Operations Manager  
East County Urgent Care



**Dusty Schroeder**  
Co-Founder  
Cowork Health

# Jackie Williams – East County Urgent Care



# Dusty Schroeder – Cowork Health

**cowork**.health

Help Events About Login [Watch a Demo](#)

# Helping you become everyone's favorite occ med provider.

Cowork is not just an occ med portal. It's a platform to manage your occ med business in a way that delights your EPS clients and gets you paid faster.

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Join over 25,000 happy users.



# Resistance To Change



# Resistance To Change

## **Lay of the Land**

- Had been doing it one way for 32 years
- Occupational medicine wasn't defined and there wasn't a vision
- Knew they wanted to grow, but didn't know what that meant

# Resistance To Change

## Steps Taken

- Defined the vision and what success looks like
- Got the *right team* in place
  - Doubters self-selected out
  - A short-staff of believers remained
  - Hired coachable people



# Systems & Processes



## **What Was Broken?**

- Paper everywhere
- Teams were siloed
- Effort was individualized with one-off emails
- Didn't set expectations with EPS clients
- Service offering was unfocused and not tailored to client needs



## Steps Taken

- Digitized everything possible
- Broke down silos and cross-trained team
- Consolidated effort where possible
- Stopped making promises we couldn't keep
- Refined services to what the market actually needed

## **Hiring & Training**

- Value-based hiring
- Built a database of clear training & reference materials
- Leveraged technology to support continuous improvement

# Systems & Processes

## *Impact of* **Digital Authorizations**

- Fewer forgotten forms and incorrect services
- Fewer phone calls and faxes
- Better experience for employer and employee

**Clinic Location**

Southside Speedy Care Glenwood  
9401 Glenwood Ave, Raleigh, SD 57201

**Who in my company can see this authorization?**

Entire Company  Departments

**Employee Name** John Patient **Employee DOB** 05/16/2002

**Visit Type** Pre-Employment

**Services**

**Protocols**  
Protocols are service packages that may include multiple services and provide additional details to the clinic.

ABC Physical ABC Pre-employment Walmart Physical  
Walmart Pre-Employment

**Your Services**  
These services are provided to your company as a part of a protocol or agreement.

**Immunizations**

COVID-19 Vaccine Flu Vaccine Hep A Vaccine Hep B Vaccine  
Immunization Administration Tetanus, Diphtheria

**Non-DOT Drug Screening**

10-Panel Drug Screen

**Physical**

# Systems & Processes

## Impact of Digital Results

- Fewer faxes
- Fewer resend requests
- Fewer questions
- Better experience for employer

Results + New Result

Search Results

All Results All Companies All Tasks

Company	Employee	Tasks	Created	Viewed
ABC Toys	Bob Smith DOB: December 12, 1978	<input type="checkbox"/>	August 15, 2024 9:36 AM	<input type="checkbox"/> <a href="#">View</a>
ABC Transport	John Patient DOB: December 12, 1978	<input type="checkbox"/>	August 1, 2024 1:03 PM	<input type="checkbox"/> <a href="#">View</a>
Darin's Tile Co.	John Smith DOB: December 12, 1978	<input type="checkbox"/>	July 23, 2024 12:37 PM	<input type="checkbox"/> <a href="#">View</a>
ABC Toys	Darin Patient DOB: ---	<input type="checkbox"/>	July 1, 2024 2:19 PM	<input type="checkbox"/> <a href="#">View</a>
ADO Test	Tom Jones DOB: November 11, 1999	<input checked="" type="checkbox"/>	June 27, 2024 5:03 PM	<input type="checkbox"/> <a href="#">View</a>
Darin's Tile Co.	John Doe DOB: ---	<input type="checkbox"/>	June 26, 2024 4:57 PM	<input type="checkbox"/> <a href="#">View</a>
Darin's Tile Co.	John Doe DOB: ---	<input type="checkbox"/>	June 19, 2024 11:00 AM	<input type="checkbox"/> <a href="#">View</a>
Darin's Tile Co.	John Doe DOB: ---	<input checked="" type="checkbox"/>	May 31, 2024 1:51 PM	<input type="checkbox"/> <a href="#">View</a>
Darin's Tile Co.	John Doe DOB: ---	<input type="checkbox"/>	May 29, 2024 3:34 PM	<input type="checkbox"/> <a href="#">View</a>
Darin's Tile Co.	John Doe DOB: ---	<input type="checkbox"/>	May 28, 2024 10:51 AM	<input type="checkbox"/> <a href="#">View</a>

# Systems & Processes

## Impact of Digital Task Management

- Less double work and checking on items
- Easier team productivity management
- Fewer missed to-do items
- Better team collaboration

Tasks

Search Tasks

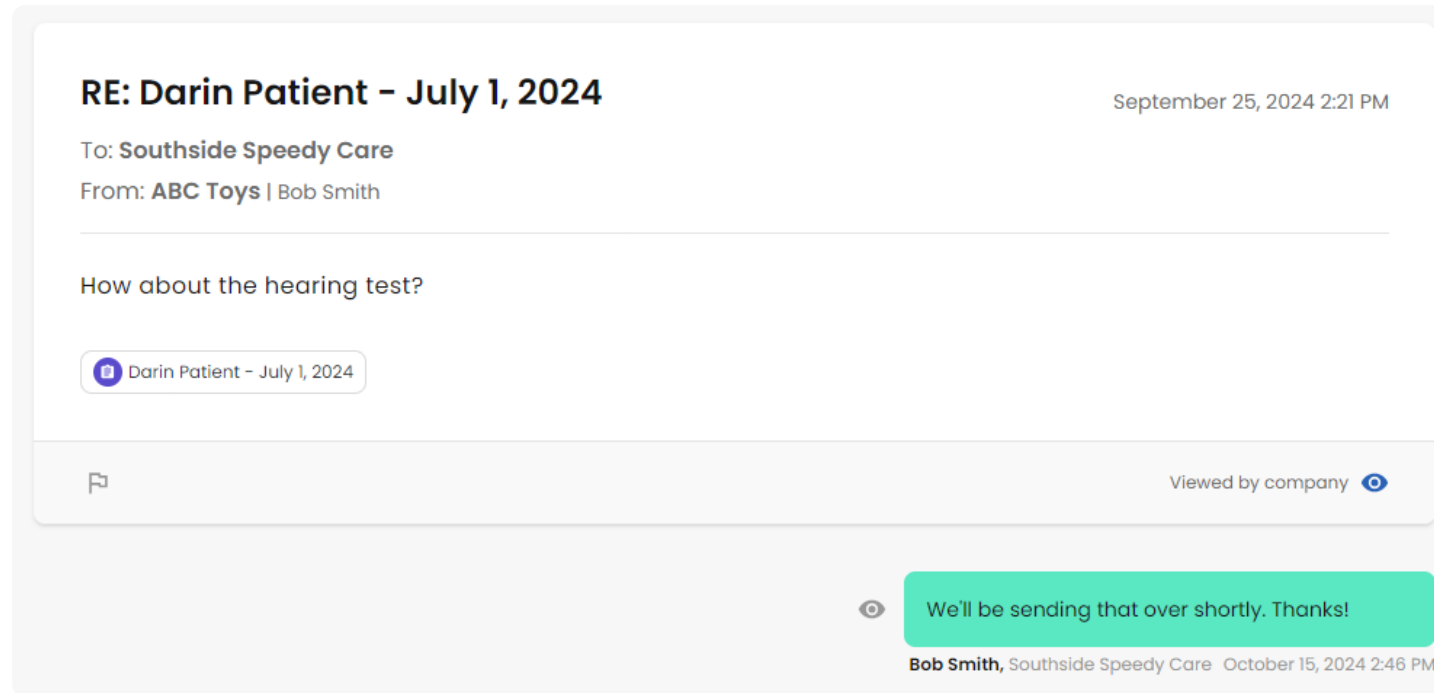
All Incomplete All Users All Priorities All Companies All Due Dates

Status	Task	Assigned To	Priority	Company	Due Date
ON HOLD	<b>Payment posting</b> Make sure to post last weeks payments. Invoice 1549	Darin Vander Well	---	Darin's Tile Co.	May 8, 2024
IN PROGRESS	<b>Results - Sally Smith</b> Still waiting on the rest of Sally's results. Sally Smith - May 9, 2...	Bob Smith	---	Darin's Tile Co.	May 14, 2024
IN PROGRESS	<b>Send mailed copy</b> Send mailed copy	---	---	ABC Toys	June 12, 2024
IN PROGRESS	<b>John Doe</b> John was seen, pending results... John Doe - May 9, 2024 John Doe - May 31, 20...	---	---	Darin's Tile Co.	June 14, 2024
NOT STARTED	<b>Scan this into our EMR</b> John Doe - May 9, 2024	Darin Vander Well	---	Darin's Tile Co.	June 27, 2024
NOT STARTED	<b>Invoice 2775</b> Make that correction... Invoice 2775	Mark Drzycimski	---	Trader Joe's	July 1, 2024

# Systems & Processes

## *Impact of* **Modern Communication**

- Faster resolution
- Collaborative follow-up since not sent to individual email address
- Fewer phone calls
- Better employer experience



# Systems & Processes

## *Impact of* **Digital Invoices & Payment**

- Delivery is immediate and confirmed
- Huge time savings
- Less paper, stamps, etc
- Faster payment
- Automated follow-up

The screenshot shows a digital invoice interface. On the left, a white box contains the text: 'INVOICE FOR', 'ADO Test', '123 N. Main', and 'Sioux Falls, SD 57106'. To the right, the status is 'UNPAID' in a blue button. Below that, the invoice number is '1781', the original amount is '\$674.00', and the sent date is 'October 12, 2022'. At the bottom, a large blue bar displays 'AMOUNT DUE' and '\$674.00' in white. On the right side of this bar are two buttons: 'View File' with a document icon and 'Pay Now' in a green button.



# Q&A

Streamlining Your Occ Med Processes