Reducing Variability in Anesthesia Work Hours by Good Decision in the Scheduling Office

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Reducing Variability in Anesthesia Work Hours by Good Decision in the Scheduling Office

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Financial Disclosure

- I am employed by the University of Iowa, in part, to consult and analyze data for hospitals, anesthesia groups, and companies
- Department of Anesthesia bills for my time, and the income is used to fund our research
 - I receive no funds personally other than my salary and allowable expense reimbursements from the University of Iowa, and have tenure with no incentive program
 - I own no healthcare stocks (other than indirectly through mutual funds)

Topics of Talk on Reducing Variability

- Review of principles in calculating allocated
 OR time for use in reducing over-utilized time
- Making good staff scheduling decisions to facilitate assignments the day before surgery
- Decision-making 1-2 days before surgery to reduce over-utilized time
- Review of bin packing principles



Example of Under-Utilized OR Time

- Allocated time is from 7:15 AM to 3:30 PM
 - These are hours into which cases are scheduled
- An OR's last case of the day ends at 1:30 PM
- There are 2 hours of under-utilized OR time
 - Under-utilized time is from 1:30 PM to 3:30 PM

McIntosh C et al. Anesth Analg 2006

Dexter F, Epstein RH. Periop Care Oper Room Manag 2024

Example of Over-Utilized OR Time

- Allocated time is from 7 AM to 3 PM
- OR's last case of the day ends at 6 PM
- There are 3 hr of over-utilized OR time
 - Over-utilized OR time is from 3 PM to 6 PM



Precise Meaning of Maximize OR Efficiency

- Inefficiency of use of OR time (\$) =

 (Cost per hour of under-utilized OR time)

 × (hours of under-utilized OR time)
- + (Cost per hour of over-utilized OR time)
 - × (hours of over-utilized OR time)

Strum DP et al. J Med Syst 1997
Dexter F, Epstein RH. Periop Care Oper Room Manag 2024

- On Mondays, hospital currently plans 3 ORs for orthopedics, each OR for 10 hr
 - $3 \text{ ORs} \times 10 \text{ hr} = 30 \text{ hr}$
- On Mondays, total hours of orthopedic cases including turnovers follows a normal distribution with a mean of 30 hr
- Relative cost of 1 hr over-utilized OR time =
 2.0 × that of 1 hr under-utilized OR time

McIntosh C et al. Anesth Analg 2006
Pandit JJ, Dexter F. Anesth Analg 2009
Dexter F, Epstein RH. Periop Care Oper Room Manag 2024

- Consider standard deviation of orthopedics' workload on Mondays = 5 hr, a typical value
- Since workload follows a normal distribution, need inverse of normal distribution function
 - Ratio of 2.0:1.0 over-utilized: under-utilized
 - Excel "= NORM.INV(2/3, 30, 5)"
- The 66th percentile of the normal distribution function with mean 30 hr and standard deviation 5 hr equals 32 hr



- Consider standard deviation of orthopedics' workload on Mondays = 5 hr, a typical value
- Using the mean of 30 hr, what OR allocation maximizes efficiency of use of OR time?
 - 1) 3 ORs: 2 × 8 hr, 1 × 10 hr
 - 2) 3 ORs: 1 × 8 hr, 2 × 10 hr
 - 3) 3 ORs: $0 \times 8 \text{ hr}$, $3 \times 10 \text{ hr}$
 - 4) 4 ORs: $4 \times 8 \text{ hr}, 0 \times 10 \text{ hr}$
 - 5) 4 ORs: $3 \times 8 \text{ hr}, 1 \times 10 \text{ hr}$
 - 6) 4 ORs: $2 \times 8 \text{ hr}$, $2 \times 10 \text{ hr}$

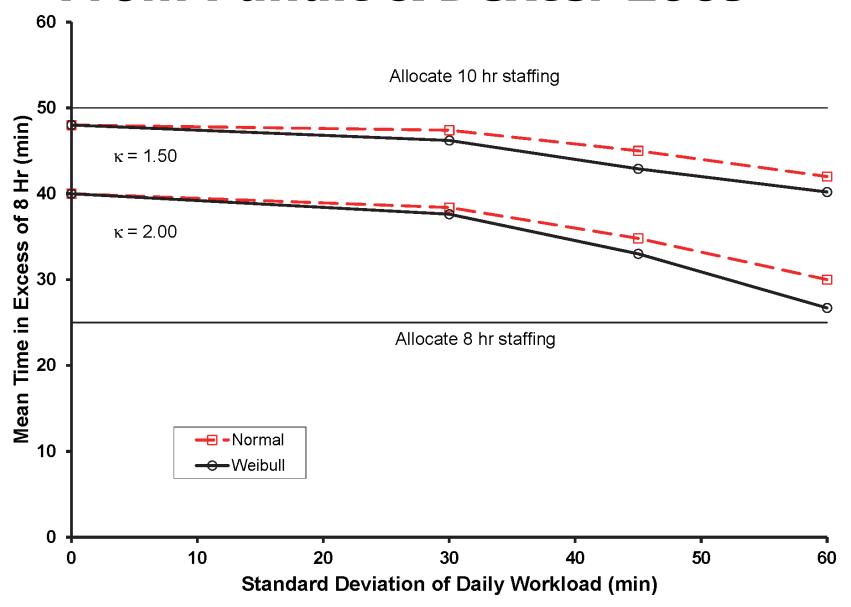
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- Consider standard deviation of orthopedics' workload on Mondays = 10 hr, a large value
- Since workload follows a normal distribution, need inverse of normal distribution function
 - Ratio of 2.0:1.0 over-utilized: under-utilized
 - Excel "= NORMINV(2/3, 30, 10)"
- The 66th percentile of the normal distribution function with mean 30 hr and standard deviation *10* hr equals *34 hr*



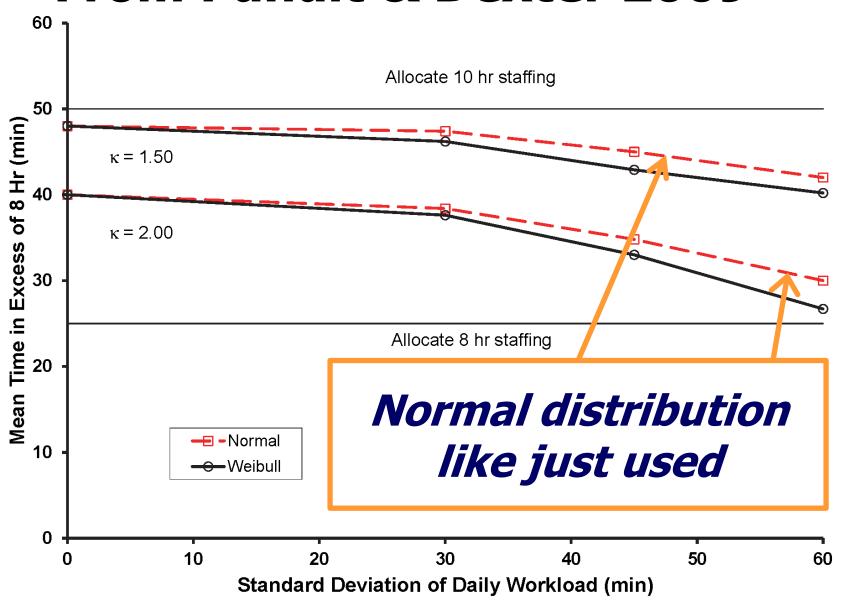
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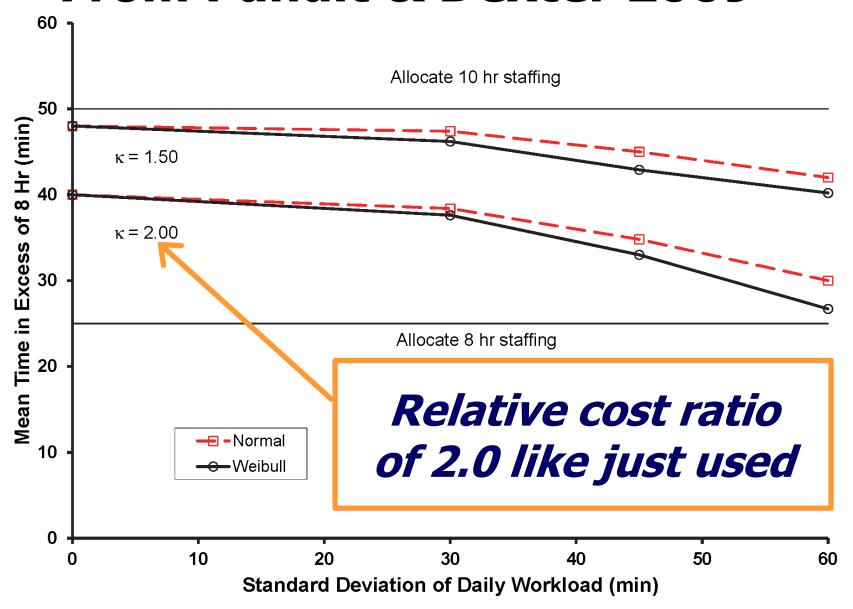
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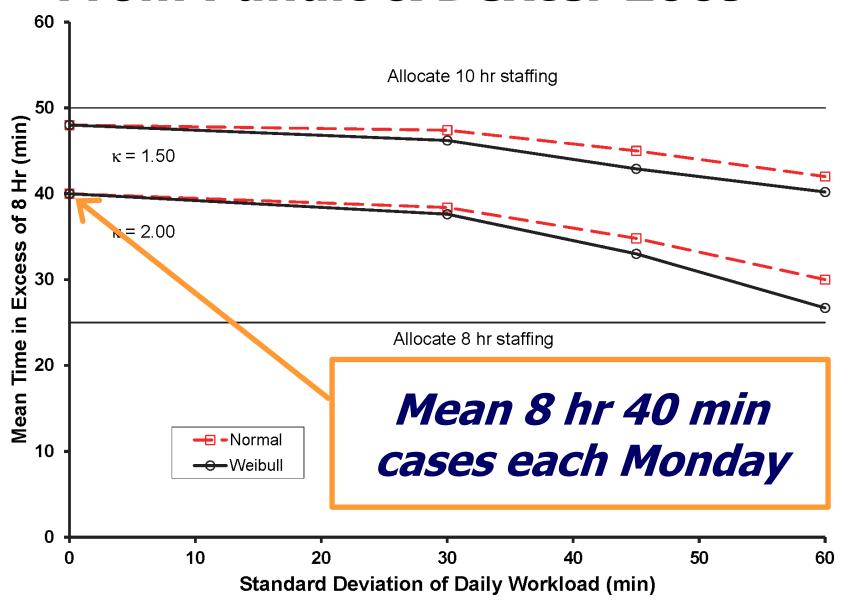


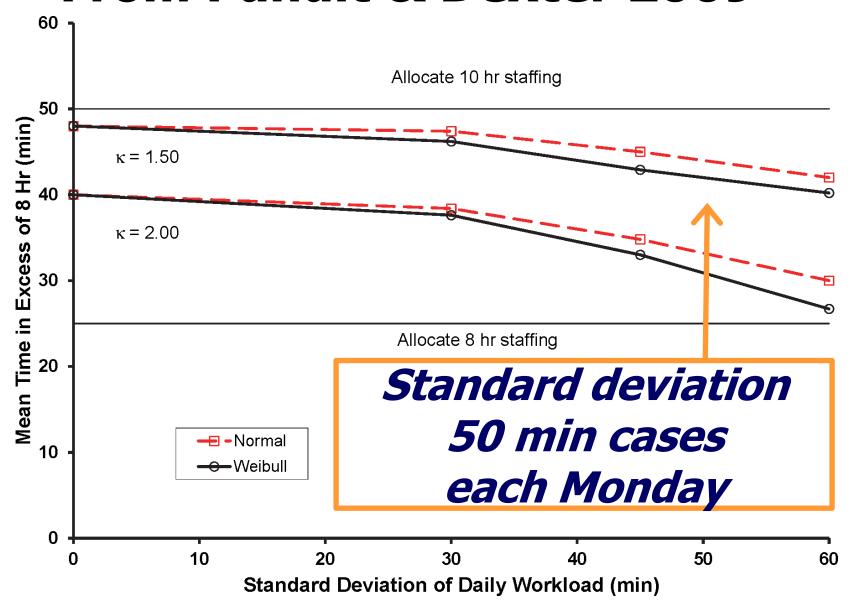
- Suppose normal distribution, mean workload 30 hours, standard deviation 5 hours, relative cost ratio of 2.00, and 10 hours allocated time
- Inefficiency of use of OR time proportional to:

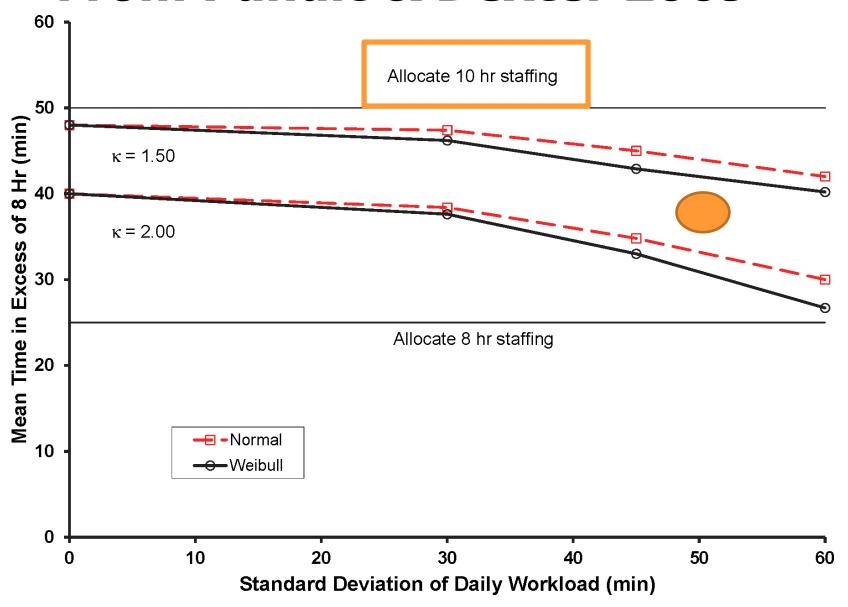












Reducing Variability

- Vertical axis relates to mean
 - Commonly used to report adjusted utilization
- Horizontal axis relates to standard deviation



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- Since objective is to reduce *variability* in work hours, focus includes both mean and the standard deviation, principally the latter



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- Vertical axis relates to mean
 - Commonly used to report adjusted utilization
- Horizontal axis relates to standard deviation
- Since objective is to reduce variability
 in work hours, focus includes both mean and
 the standard deviation, principally the latter
- For monitoring reduction in variability and recognizing when and how it has been achieved, please see the previous talk online



Topics of Talk on Reducing Variability

- Review of principles in calculating allocated
 OR time for use in reducing over-utilized time
- Making good staff scheduling decisions to facilitate assignments the day before surgery
- Decision-making 1-2 days before surgery to reduce over-utilized time
- Review of bin packing principles



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 - ➤ To start multiple peripheral nerve blocks in preoperative area on-time, staff scheduling also needs to include anesthesiologists' arrival times

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 - To start multiple peripheral nerve blocks in preoperative area on-time, staff scheduling also needs to include anesthesiologists' arrival times
- ➤ If plan for 3 ORs daily, anesthesia assignment office falsely appears to perform poorly each Monday

Application to Staff Scheduling and to Staff Assignment

- Service has multiple specialties, 10 hr staffing
- Resident physicians scheduling is one of the specialties, with policy that when no cases for the specialty they are not assigned other cases
 - On $1/3^{rd}$ of workdays there are no cases of the specialty, and when ≥1, mean 5.4 hr of cases

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 - On $1/3^{rd}$ of workdays there are no cases of the specialty, and when ≥1, mean 5.4 hr of cases
- ➤ Need to schedule nurse anesthetist for the 1/3rd of days' first case starts and for the afternoons: low observed productivity

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- ➤ After first cases of day, period of day with the largest numbers of anesthesia providers needed is also middle of day because of lunch breaks (at hospitals with ORs lasting >8 hours)



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Marjamaa RA et al. Health Care Manag Sci 2009 Smallman B et al. Anesth Analg 2013

- Most prolonged turnovers occur middle of day
- After first cases of day, period of day with the largest numbers of anesthesia providers needed is also middle of day because of lunch breaks (at hospitals with ORs lasting >8 hours)
- Plan staff scheduling to have providers for all ORs during middle of day, no gap for breaks
- ➤ Use displays with evidence-based dynamic assignment of providers to ORs for breaks

Epstein RH, Dexter F. Anaesth Intensive Care 2012 Titler SS et al. Cureus 2021 and Breastfeed Med 2021

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- OR nurses, nurse anesthetists, and anesthesiologists are full-time employees
- Allocated time is from 8 AM to 3:30 PM
- There are estimated to be 8.5 hr of cases
- Turnover and extubation times are brief
- OR finishes at 3:30 PM, instead of 4:30 PM
- Has OR efficiency been increased?



- OR nurses, nurse anesthetists, and anesthesiologists are full-time employees
- As approach the day of surgery, the cost of an hour of under-utilized OR time becomes negligible relative to the cost of an hour of over-utilized OR time



- Inefficiency of use of OR time (\$) ≅

 (Cost per hour of under-utilized OR time)

 × (hours of under-utilized OR time)
- + (Cost per hour of over-utilized OR time)
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Dexter F, Traub RD. Anesth Analg 2002 Dexter F et al. Anesthesiology 2004



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Constant



Inefficiency of use of OR time (\$) ≅

(Cost per hour of over-utilized OR time)

× (hours of over-utilized OR time)

Constant

Decisions made in the scheduling office to maximize OR efficiency are those that minimize the hours of over-utilized OR time



- Scenario
 - Allocated time was from 8 AM to 3:30 PM,
 which is 7.5 hr
 - Reducing turnover and extubation times resulted in cases finished in 7.5 hr instead of in the expected 8.5 hr
 - Finished at 3:30 PM instead of at 4:30 PM
 - Had 0 hours of over-utilized time instead of 1 hour of over-utilized time



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 - Had 0 hours of over-utilized time instead of 1 hour of over-utilized time
- ➤ Increased efficiency of use of OR time by preventing 1 hr of over-utilized OR time

- OR nurses, nurse anesthetists, and anesthesiologists are full-time employees
- Allocated time is from 8 AM to 3:30 6 PM
- There are estimated to be 8.5 hr of cases
- Turnover and extubation times are brief
- OR finishes at 3:30 PM, instead of 4:30 PM
- Has OR efficiency been increased?



- Scenario
 - Allocated time is from 8 AM to 3:30 6 PM
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McIntosh C et al. Anesth Analg 2006

Dexter F et al. Anesth Analg 2016

Dexter F, Epstein RH. Periop Care Oper Room Manag 2024

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 - ➤ No increase in OR efficiency

Good OR management operational decisionmaking is highly sensitive to the OR allocations, which is why those values used in scheduling office need to be calculated appropriately

- Allocated time for Ophthalmology Associates is 7:15 AM to 3:30 PM in OR 1 and OR 2
- Dr. Smith has scheduled cases in OR 1 that are scheduled to finish at 2 PM
- OR 2 is empty
- Dr. Reynolds wants an afternoon start
 - She asks to start an elective
 3-hour case at 3 PM in OR 1
- Schedule the case into OR 1?



Scenario – Case Scheduling to Maximize OR Efficiency

- Starting the case at 3 PM would be expected to result in over-utilized OR time, thereby reducing OR efficiency
- Options available to Dr. Reynolds:
 - Take first case of the day start in OR 2
 - Choose a different workday

Dexter F et al. Anesth Analg 2012 Shi P et al. Anesth Analg 2016



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- Starting the case at 3 PM would be expected to result in over-utilized OR time, thereby reducing OR efficiency
- Options available to Dr. Reynolds:
 - > Take first case of the day start in OR 2
 - Most facilities do not schedule an OR with over-utilized OR time when another allocated OR is empty
 - Choose a different workday



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- Options available to Dr. Reynolds:
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 - Take first case of the day start in OR 2
 - ➤ Choose a different workday
 - She has OR time available every workday

<u>Must</u> get OR allocation right to PREVENT this scenario. Every case scheduling conflict is failure of OR allocation until proven otherwise.

- At facilities where anesthesiologists supervise multiple ORs, they must effectively use staggered starts (≅ 20 min) of first cases of day, since otherwise they cannot be present at all critical portions of cases
 - Otherwise 1:2 MD:CRNA, lapses > 30% of days
 - Otherwise 1:3 MD:CRNA, lapses > 96% of days



 Let the surgeons know so that those with the later starts are not waiting in the ORs



- Let the surgeons know so that those with the later starts are not waiting in the ORs
- ➤ Yes, preferentially focusing on ORs with overutilized time, since ordered priorities are first performing all the cases safely and second reducing expected over-utilized time

Dexter F et al. Anesthesiology 2004 Dexter F et al. Anesth Analg 2007



- Let the surgeons know so that those with the later starts are not waiting in the ORs
- Yes, preferentially focusing on ORs with overutilized time, since ordered priorities are first performing all the cases safely and second reducing expected over-utilized time
- ➤ Important to understand since fixation on first case starts is due to cognitive bias that starting late results in all cases being tardy



- Some surgeons have significantly briefer turnover times when assigned to specific anesthesiologists
- For those surgeons, when possible, make assignment decisions to reduce turnover times
- Overall benefit is 6.8% reduction in median turnover times (95% CI 6.3% to 7.1%)



End surgery to tracheal extubation (≥ 15 min)
delays start next case, rated poorly by
anesthesiologists, and important to surgeons

Apfelbaum JL et al. Anesth Analg 1993 Vitez TS, Macario A. J Clin Anesth 1998 Masursky D et al. Anesth Analg 2012 Dexter F, Epstein RH. Anesth Analg 2013



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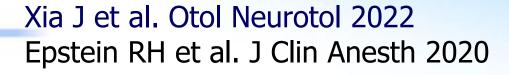


- End surgery to tracheal extubation (≥ 15 min)
 delays start next case, rated poorly by
 anesthesiologists, and important to surgeons
- ➤ Odds ratio 2.10 (P = 0.025) for the 57% of cases when nurse anesthetist or resident physician worked with neurosurgeon
 - < 5 previous cases

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- ➤ Odds ratio 4.4 (P = 0.005) for the cases when the anesthesiologist worked with neurotologist < 5 previous cases</p>
- Odds ratio 2.10 (P = 0.025) for the 57% of cases when nurse anesthetist or resident physician worked with neurosurgeon
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- Odds ratio 4.4 (P = 0.005) for the cases when the anesthesiologist worked with neurotologist
 5 previous cases
- Odds ratio 2.10 (P = 0.025) for the 57% of cases when nurse anesthetist or resident physician worked with neurosurgeon
 - < 5 previous cases
- ➤ Threshold is <5 previous cases over 3 years, which at hospital was for 74% of cases, causing 23% prolonged extubations

Dexter F et al. Periop Care Oper Room Manag 2023

- Anesthesia-controlled times, anesthesiologist
 & nurse anesthetist vs. & resident physician
 - (OR entrance until preparation can start) +(end of procedure [dressing on] until OR exit)
 - 2.5 min (SE 0.2) quicker, P < 0.001
- Turnover times, anesthesiologist & nurse anesthetist vs. & 1st year anesthesia resident
 - 2.6 min (SE 1.1) quicker, P = 0.016

Dexter F et al. Anesth Analg 1995 Urman RD et al. Ochsner J 2012 Hoffman CR et al. BMC Med Educ 2018



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Nurse Staff Assignment

- For each targeted OR
 - Assign senior nurse with expertise in the surgical specialty as lead
 - In addition to surgical technician and circulating nurse
 - Assign 2 dedicated PACU beds to the OR
- Significantly reduce non-operative time



Managerial Behavior

- When monitoring managers' performance, good criterion is use by their facility of either:
 - Displays providing recommendations
 - Displays providing information and checklists for how to use the information

Dexter F et al. Anesth Analg 2007 Stepaniak PS, Dexter F. Anesth Analg 2013



Managerial Behavior

- When monitoring managers' performance, good criterion is use by their facility of either:
 - Displays providing recommendations
 - Displays providing information and checklists for how to use the information
- ➤ Use anesthesia group facility agreement to codify the performance criteria

Dexter F, Epstein RH. Anesth Analg 2008 Dexter F, Epstein RH. Anesth Analg 2015



Caution: Do Not ↓ Variability and Yet Net ↓ Productivity

Productivity =

 (clinical care provided / \$ per regular hour)
 / (allocated hours +

 {ratio > 1} × over-utilized hours)



Caution: Do Not ↓ Variability and Yet Net ↓ Productivity

- Productivity =
 - (clinical care provided / \$ per regular hour)
 - / (allocated hours +
 - {ratio > 1} × over-utilized hours)
- Would have nearly zero over-utilized time if every surgeon had 2 ORs every day



Caution: Do Not ↓ Variability and Yet Net ↓ Productivity

- Productivity =
 - (clinical care provided / \$ per regular hour)
 - / (allocated hours +
 - {ratio > 1} × over-utilized hours)
- Would have nearly zero over-utilized time if every surgeon had 2 ORs every day
 - But productivity would be extremely low

- Reduced productivity from 3 versus 2 anesthesia providers assigned to 2 ORs
- Increased productivity from 4 versus 3 anesthesia teams assigned to 3 ORs
- ➤ Increased productivity from 5 versus 4 anesthesia & nursing teams assigned to 4 ORs

Williams BA et al. Am J Anesthesiol 1998 Hanss R et al. Anesthesiology 2005 Torkki PM et al. Anesthesiology 2005

- Reduced productivity from 3 versus 2 anesthesia providers assigned to 2 ORs
- ➤ Increased productivity from 4 versus 3 anesthesia teams assigned to 3 ORs
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- > Results insensitive to specific workflow

Marjamaa RA et al. Health Care Manag Sci 2009

- Reduced productivity from 3 versus 2 anesthesia providers assigned to 2 ORs
- Increased productivity from 4 versus 3 anesthesia teams assigned to 3 ORs
- Increased productivity from 5 versus 4 anesthesia & nursing teams assigned to 4 ORs
- Results insensitive to specific workflow
- ➤ Facilitate by coordinating dates surgeons operate ("blocks") to best use the shared OR(s)



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 OR time for use in reducing over-utilized time
- Making good staff scheduling decisions to facilitate assignments the day before surgery
- Decision-making 1-2 days before surgery to reduce over-utilized time
- > Review of bin packing principles



Dexter F et al. Anesthesiology 1999
Dexter F, Traub RD. Anesth Analg 2002
Dexter F et al. Anesthesiology 2004
Shi P et al. Anesth Analg 2016



- Allocated time from 7 AM to 5 PM
- Time remaining in ORs at 2 PM
 - 3 hours in add-on OR [available immediately]
 - 2 hours in OR 2 [available in 1 hr]
 - 1 hour in OR 3 [available in 2 hr]
 - 0 hours in all other ORs
- Three add-on cases listed in sequence of submission: 0.7 hr, 2.9 hr, 1.8 hr
- All can safely wait a few hours
- Perform cases in what sequence?

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- Sort the cases based on estimated duration from longest to shortest
 - Consider the cases in this descending order
 - Longest add-on case is assigned first
- Assign each case to OR meeting two criteria
 - Has no restrictions on equipment or personnel preventing the case from being put into the OR
 - Sufficient extra time available for the new case



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- On average, only 1/5 ORs with scheduled cases will have time available for add-on case
- Average time remaining in these ORs each day will be around 1.3 hr, with large SD 1.6 hr
- Average OR time of add-on cases including their turnover times around 3.4 hr (SD 1.7 hr)
 - Long, since add-on case scheduling applies to cases at hospitals, rarely outpatient facilities

Dexter F et al. Anesthesiology 1999



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- Average OR time of add-on cases including their turnover times around 3.4 hr (SD 1.7 hr)
 - Long, since add-on case scheduling applies to cases at hospitals, rarely outpatient facilities
- Because 0 or 1 add-on cases per OR not designated for add-on cases

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- Assign each case to OR meeting two criteria
 - Has no restrictions on equipment or personnel preventing the case from being put into the OR
 - Sufficient extra time available for the new case



- Sort the cases based on estimated duration from longest to shortest
 - Consider the cases in this designating order
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- Sort the cases based on estimated duration from longest to shortest
 - Consider the cases in this descending order
 - Longest add-on case is assigned first
- Assign each case to OR meeting two criteria
 - Has no restrictions on equipment or personnel preventing the case from being put into the OR
 - Sufficient extra time available for the new case
 - Reduces the hours of over-utilized OR time!

Topics of Talk on Reducing Variability

- Review of principles in calculating allocated
 OR time for use in reducing over-utilized time
- Making good staff scheduling decisions to facilitate assignments the day before surgery
- Decision-making 1-2 days before surgery to reduce over-utilized time
- Review of bin packing principles



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- A service on Tuesdays has a mean of 8 hr 40 min with a standard deviation of 50 min
- Allocate 8 hr or 10 hr and why?



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- A service on Tuesdays has a mean of 8 hr 40 min with a standard deviation of 50 min
- Allocate 8 hr or 10 hr and why?
- > 10 hr maximizes efficiency of use of OR time



- A studied surgical suite had some allocated ORs for 8 hours and other 10 hours, based on minimizing the inefficiency of use of OR time
- Anesthesiologists supervise CRNAs, some ORs 1:2 and some 1:3
- What are the two times of day that the largest numbers of anesthesia providers are needed?



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- What are the two times of day that the largest numbers of anesthesia providers are needed?
- > First case starts and lunch breaks
 - Middle of the day, when there are also the largest numbers of turnovers

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- ➤ Increased over-utilized OR time, since all cases should still be completed

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- When planning first case of day starts, how decide what ORs to stagger to start first? Last?

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- When planning first case of day starts, how decide what ORs to stagger to start first? Last?
- > Start first OR(s) with over-utilized time
- > Start last OR(s) with most under-utilized time

Additional Information on Operating Room Management

- www.FranklinDexter.net/education.htm
 - Full course (e.g., medical directors and analysts)
 - Lectures on day of surgery decision making, case duration prediction, allocating OR time, increasing anesthesia productivity, financial analysis, and strategic decision-making
- www.FranklinDexter.net
 - Comprehensive bibliography of peer reviewed articles in operating room and anesthesia group management
 - Sign-up for notifications of new articles