Access for the Future

Maximizing Patient Satisfaction and On-Demand Care with a Multi-Specialty Contact Center
Presenters

Anna Roman, PhD, MPA

- Senior Vice President, Administrative Services
- 30 years of experience in Health Administration and Workforce Risk Management
- 15 years of experience in patient relations and physician practice efficiency metrics including implementation of Press Ganey survey methodology, and establishment of Practice Manager and Patient Ambassador programs
- Member of American Medical Group Association (AMGA), AAMC, MGMA & WBL

Karen Shaffer-Platt

- Vice President, Revenue Cycle/Patient Concierge Services at UPMC
- 30 years experience in Access and Revenue Cycle Management in both the Hospital and Physician Services
- 25 years of IT project management experience, including scheduling, ADT & Billing system design, direction of system training and development, system installation and data conversion
- Graduate of the University of Pittsburgh
- Member of NAHAM, AAHAM, & HFMA
UPMC Health Systems

UPMC is a world-renowned health care provider and insurer based in Pittsburgh, PA, inventing new models of accountable, cost-effective, patient-centered care.

– The largest non-governmental employer in PA (62,000+ employees)
– Operates over 20 academic, community, and specialty hospitals and 400 outpatient sites, employs approximately 3,500 physicians, and offers an array of rehabilitation, retirement, and long-term care facilities.
UPMC Health Systems: Annual Patient Activity

- Admits more than 287,000 inpatients and observation cases
- Sees more than 3.9 million outpatient office visits
- Cares for nearly 690,000 emergency visits
- Performs nearly 189,000 surgeries
- Makes more than 690,000 home care visits
UPMC Core Values: Patient Experience

Every patient believes that every individual involved in his or her care has demonstrated dignity, respect and kindness while listening to his or her unique needs. This vision is only achieved by showing every patient in every interaction that we truly care.

The UPMC patient experience vision is built upon our values as an organization.

OUR VALUES
QUALITY & SAFETY
DIGNITY & RESPECT
CARING & LISTENING
RESPONSIBILITY & INTEGRITY
EXCELLENCE & INNOVATION
Healthcare Paradigm Shift

Traditional Priorities

- Compliance
  - Internal Protocols
  - External Regulations
- Fee for Service Reimbursement

Current Market Drivers

- Patient Satisfaction & Consumer Demands
- Increased Competition
- Quality Reporting & “Volume to Value”

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How to Thrive in a Dynamic Marketplace

Meet Consumer Demands

Availability
Answer every call

Convenience
When do you want to be seen?

Consistency
Thank you for choosing UPMC

Efficiency
Immediate results

Affordability
Economies of Scale

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The Practice of Medicine is Sophisticated  
*One Size Does Not Fit All*

<table>
<thead>
<tr>
<th>Medical Services</th>
<th>Surgical Services</th>
<th>Specialized Services</th>
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<tbody>
<tr>
<td>Behavioral and Mental Health Services</td>
<td>Obstetrics and Gynecology</td>
<td>Bloodless Medicine and Surgery</td>
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<td>Cancer</td>
<td>Ophthalmology</td>
<td>Diabetes Education and Support</td>
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<td>COPD and Emphysema Center</td>
<td>Pain Medicine</td>
<td>Global Care (for international patients)</td>
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<td>Dermatology</td>
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<td>Home Care Services</td>
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<td>Palliative and Supportive Institute</td>
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<td>Ear, Nose and Throat</td>
<td>Pulmonology and Respiratory</td>
<td>Pittsburgh Poison Center</td>
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<td>Emergency Medicine</td>
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<td>re:solve Crisis Network</td>
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<td>Geriatrics</td>
<td>Sports Medicine</td>
<td>UPMC Corporate Health/Executive</td>
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<td>Gastroenterology</td>
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<td>Heart and Vascular</td>
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<td>Imaging Services</td>
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<td>Kidney Disease</td>
<td>Women's Health</td>
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<td>Liver</td>
<td>Wound Healing Services</td>
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<td>Neurology</td>
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26+ Sub-Specialties with Unique Needs

**Incentives Drive Change**

Clinical Considerations

- Is this the right department?
- Is this the right doctor?
- Are these the right tests?

Patient Billing & Logistics

- **Insurance plans accepted**
- **Parking**

**Physician Autonomy**

*I want to set my own*

- Appointment length
- Weekly schedule
- Vacation
Moving the future into the present

ACCESS REDESIGN
UPMC conducted a revamp of the current access models within the Hospital and Physician divisions to prepare for Access of tomorrow.

Access of the Future

- Competing Demands
- Accountable Care Measures
- More Payors in the Marketplace
- Transition from Quantity to Quality Measures
- New Competitive Marketplace
- Transparency
The UPMC Patient Experience: Translating Core Values into Action

Welcome new patients
Recognize return patients

Open scheduling
When would you like to be seen?

Lead patients to best possible care

Perfect collaboration between financial, clinical and health plan administration

KPIs: measure patient satisfaction and business metrics

Engage patients in their next service and follow-up care

Easier payment management

Coaching & counseling is collection strategy

Patient Centric Experience

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Access Leadership – Managed by Business Unit

- Clinical Operations Support
- Patient Arrival and Checkout
- Site Specific Training
- Managed by Business Unit
- Daily Staff Management
- Virtual Contact Center
Supporting an Agile Business Model

CENTRAL CONTACT CENTER SCOPE & INITIATIVES
Central Contact Center

Workforce Management

The Patient

Central Scheduling Contact Center

Decentralized Ancillary Schedulers

Decentralized Department Schedulers
“Virtual Call Center”
Contact Center Overview

24/7 Consumer Contact Center

7.1 Million calls handled per year

Centralized Patient Contact Hub

- Scheduling & Answering Service
- Office of Physician Relations & MedCall
- Price Estimation & Financial Assistance
- Customer Service
- Consumer Referral Service
Services & Initiatives: Central Contact Center

- **Scheduling**
  - Telemedicine
  - Pre and Post Reg
  - Patient Quality Outreach

- **Answering Service**
  - Servicing over 170 departments
  - Answers for 1,441 clinical providers
  - 24/7 operation

- **Customer Service**
  - Hospital, Physician & Cancer Center Customer Service
  - Customer Service for MSO’s
  - Self Pay Collections

- **Consumer Referral Service**
  - UPMC Find a Doctor line
  - UPMC Marketing and Research line

- **Office of Physician Relations**
  - MedCall
  - Post-Acute Resource Center (PARC)
  - On Demand Hospital Operators
<table>
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<tr>
<th>Services &amp; Initiatives: Central Contact Center</th>
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<tbody>
<tr>
<td><strong>Welcome Calls</strong></td>
</tr>
<tr>
<td>• All New Patients to UPMC</td>
</tr>
<tr>
<td>• Provide directions and payment expectations</td>
</tr>
<tr>
<td><strong>Price Estimation Team</strong></td>
</tr>
<tr>
<td>• Provide expected patient liability in advance of service</td>
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<tr>
<td>• Increase ability to collect earlier in the revenue cycle, reducing overall cost to collect</td>
</tr>
<tr>
<td>• Increase overall self pay cash flow and reduce uncompensated care</td>
</tr>
<tr>
<td><strong>UPMC Insurance Hotlines</strong></td>
</tr>
<tr>
<td>• Insurance Question Hotline</td>
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<tr>
<td>• Senior Insurance Line</td>
</tr>
<tr>
<td>• Government Relations Line</td>
</tr>
<tr>
<td>• Physician Hotline</td>
</tr>
<tr>
<td><strong>Discharge Planning</strong></td>
</tr>
<tr>
<td>• Contact patients to schedule follow-up PCP and specialist appointments post discharge</td>
</tr>
<tr>
<td>• Specific initiatives include various patient populations; most notable is the COPD, CHF, CAP and AMI patient population</td>
</tr>
<tr>
<td><strong>Financial Assistance</strong></td>
</tr>
<tr>
<td>• Assist patients with self-pay liability</td>
</tr>
<tr>
<td>• Mini-screening for Medical Assistance eligibility</td>
</tr>
</tbody>
</table>
Patient Experience

Patient Counseling: Our most effective approach

- Proactive discussions with patients at appropriate times in comfortable settings
- Not on a gurney, while under sedation or medicated for a procedure
Implementing New Initiatives
Standardized Agility in a Dynamic Healthcare Market

Work Force Management

New Initiative: Insurance Hotline

Centralized Recruitment Model

Scheduling

Customer Service
We don’t shape the tools, the tools shape us

ADVANCED TECHNOLOGY
Innovative Technology: Overview

- Epic Scheduling Questionnaire
- Epic CRM
- NICE IEX
- MyUPMC
- Microsoft CRM
- Agent Scheduling System
- Telephonic Patient Outreach
- Call Monitoring and Quality Assurance Software
Leading Patients to Best Possible Care

Epic Questionnaires

- Used as a decision support tool by the Contact Center to allow cross training of scheduling agents

- Enables scheduling agents to schedule for 20+ diverse sub specialties. Including: Orthopaedics, ENT, Neurosurgery, Dermatology, etc...
Success Factors: Physician Buy-In

Physicians Design Their Own

- Scheduling Template
- Clinical Workflow & Requirements
- Appointment Lengths
- Location & Department Specific Instructions
Success Factors: Collaboration & Customization

Identify Common Themes Across All Departments and Integrate
Department-Specific Requirements

Have you been seen in the department before?
What is the reason for your visit?
Which doctor do you see?
At what location were you seen before?
Have you been referred to a specific physician?
What type of insurance do you have?

Have you had surgery performed by one of our Orthopedic Surgeons within the past 90 days/are you coming in for a post operative visit?
Please note that this patient is greater than 50 yrs old. Schedule as directed
What type of problem or area of the body is of most concern (back/spine, hip, knee, etc) that you want to be seen for? AGENT: Be as specific as possible in Appt Notes
Have you had any prior surgery performed by an outside physician on the site/area of concern?
Was the surgery within the last 90 calendar days?
Have you had any films taken or tests done (XR, MRI, etc) related to your condition?
Have you been diagnosed with having a Fracture (Broken Bone)?
Were you given a timeframe to be seen? AGENT: If NO, pts w/ fractures must be seen within 24 hours if they have not been given a timeframe to be seen.
Example Workflow
GI Surgery Oncology – Pediatric Transfer

Have you been seen in this department before? (if return patient greater than 3 years, say NO)

Have you seen one of our providers in the hospital?

Did you have surgery within the past 90 days by one of our providers?

This patient is 15 or younger
DO NOT SCHEDULE

Type “OK”
[User is transferred to pediatric GI Surgery Oncology department questionnaire]

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Technology-Enabled Optimization

**CRM (Customer Relationship Management)**

- Epic communication pathway: Patient Access Specialists, Centralized Billing and decentralized department staff
- Initiate backend automation and provides centralized documentation of patient contact & resolution

**Telephony**

- Centrally managed Workforce/real time call monitoring with phone scheduling KPIs and reporting standards
- Call Forecasting to staff to current volume, Quality Assurance (QA) call recording & standardized Training

**NICE IEX Workforce Management**

- Provides accurate staffing and capacity planning, long and short-term forecasting
- ‘What-if’ analysis and Real-Time/Intra-day change management
- Historical adherence and reporting, with ability to plan and staff around shrinkage
You can’t manage what you don’t measure

METRICS & REPORTING
An evidence-based management approach

- Proactively, point of service departments are given report cards that measure:
  - Department KPIs
    - Copays, Press Ganey scores, etc.
  - Operational KPIs down to the user level
    - Check-ins by users, scheduled appointments by user, etc.

Quality assurance checks are done via randomly monitored phone calls and department site visits. This data is available monthly for all departments to see and the data is shared among peers.
Analytics Drive Process Improvement
Scheduling & Monitoring Staffing Levels
Live Intra-day monitoring
Customer Service CRM Reporting for Operations

Customer Service provides Access feedback on why patients are calling, and how future calls maybe prevented. Tutorials/training sent with report cards.

<table>
<thead>
<tr>
<th>SUB TOPIC</th>
<th>Jul</th>
<th>Aug</th>
<th>Sep</th>
<th>Oct</th>
<th>Nov</th>
<th>Dec</th>
<th>6 Mo Trending</th>
<th>6 Mo Avg</th>
<th>6 Mo Min</th>
<th>6 Mo Max</th>
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<td>1 - Incorrect Copay Collected</td>
<td>1</td>
<td>2</td>
<td>1</td>
<td>1</td>
<td>1</td>
<td>1</td>
<td>1.17</td>
<td>1</td>
<td>1</td>
<td>2</td>
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<td>19 - Duplicate Charges</td>
<td>3</td>
<td>16</td>
<td>8</td>
<td>11</td>
<td>11</td>
<td>5</td>
<td>9.00</td>
<td>3</td>
<td>16</td>
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<td>46 - Quality of Care</td>
<td>5</td>
<td>12</td>
<td>14</td>
<td>11</td>
<td>14</td>
<td>10</td>
<td>11.00</td>
<td>5</td>
<td>14</td>
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<td>48 - Wait Time at Office</td>
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<td>52 - Incorrect Insurance Information</td>
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<td>298</td>
<td>333</td>
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<td>253</td>
<td>240</td>
<td>291.83</td>
<td>240</td>
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<td>7 - Copay Not Collected on Date of Service</td>
<td>16</td>
<td>47</td>
<td>13</td>
<td>4</td>
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<td>8 - Coordination of Benefits Issue</td>
<td>360</td>
<td>300</td>
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<td>250.83</td>
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## Press Ganey

<table>
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<tr>
<th>CGCAHPS Questions - AVG% Yes Definitely</th>
<th>HVI February 2014</th>
<th>All CMI February 2014</th>
<th>All UPP February 2014</th>
<th>Press Ganey 75th Percentile Rank</th>
</tr>
</thead>
<tbody>
<tr>
<td>Clerks treat with courtesy/respect</td>
<td>97.39</td>
<td>94.99</td>
<td>93.77</td>
<td>95.40</td>
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<td>Clerks/receptionists helpful</td>
<td>96.54</td>
<td>92.20</td>
<td>90.53</td>
<td>92.00</td>
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### Standard Press Ganey Questions

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<tr>
<th>Access</th>
<th>HVI February 2014</th>
<th>All CMI February 2014</th>
<th>All UPP February 2014</th>
<th>Press Ganey 75th Percentile Rank</th>
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</thead>
<tbody>
<tr>
<td>Ability to get desired appointment*</td>
<td>90.8</td>
<td>89.6</td>
<td>86.7</td>
<td>90.9</td>
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<tr>
<td>Convenience of our office hours</td>
<td>92.1</td>
<td>90.3</td>
<td>88.2</td>
<td>90.5</td>
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<tr>
<td>Courtesy of registration staff</td>
<td>95.8</td>
<td>94.0</td>
<td>92.9</td>
<td>94.0</td>
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<td>Ease of getting clinic on phone</td>
<td>90.6</td>
<td>91.0</td>
<td>88.0</td>
<td>88.9</td>
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<td>Ease of scheduling appointments</td>
<td>92.5</td>
<td>92.3</td>
<td>90.0</td>
<td>91.2</td>
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<td>Information about delays</td>
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<td>87.9</td>
<td>82.0</td>
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<th>Moving Through Your Visit</th>
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<td>Wait time at clinic</td>
<td>90.2</td>
<td>88.4</td>
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<td>86.2</td>
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<tr>
<td>Waiting area comfort/pleasantness*</td>
<td>91.2</td>
<td>89.4</td>
<td>86.9</td>
<td>91.7</td>
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Today & Beyond: The Digital Business Office

- Directly schedule appointment
- Request, cancel, or reschedule appointment
  - Chat with scheduling agents to cancel and reschedule appointments
- Pre-registration
  - Pre-registration forms for review and updates prior to appointment
- eStatements and Payments
  - View current statements and pay patient liability
- In Progress
  - Utilize real time notifications and text messages to:
    - Alert patient to wait times or traffic issues
    - Remind patient of copay and documentation needed for visit
    - Online check-in day of appointment
    - Set up & manage payment plans
    - Telehealth, On-demand Care, & eVisits
“Coming together is a beginning, staying together is progress, and working together is success.”

-Henry Ford