Patient Satisfaction at the Epicenter of Healthcare Delivery:

Centralized Access Leadership without Centralized Ownership
Presenter: Connie Sawa

• Regional Director, Patient Concierge Services at UPMC
• 27 Years of Health Care Patient Access experience including front desks operations, systems integration, central recruitment and floater pool services
• Graduate of Community College of Allegheny County with a degree in Business & Data Processing.
• National Association of Healthcare Access Management member
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 more than 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.
UPMC Revenue Cycle Services

Before – Operational Fragmentation

<table>
<thead>
<tr>
<th>Hospital</th>
<th>PSD</th>
<th>Corp</th>
<th>Integrated</th>
</tr>
</thead>
<tbody>
<tr>
<td>Access, Scheduling and Support</td>
<td>Access Operations</td>
<td>Access Operations</td>
<td>Provider Call Center</td>
</tr>
<tr>
<td>Hospital Patient Scheduling</td>
<td>PSD Patient Scheduling</td>
<td>PSD Patient Scheduling</td>
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<td>Coding /Charge Mgmt</td>
<td>Coding /Charge Mgmt</td>
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<tr>
<td>Back Office</td>
<td>PSD Back Office</td>
<td>Hospital Back Office</td>
<td>Charity Care and MA App.</td>
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<td>PSD Insurance Verification</td>
<td>Hospital Patient Collections</td>
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UPMC Revenue Cycle Services

After – Centers of Excellence Approach

Patient-Focused Process

Integrated Centers of Excellence **

- Patient Concierge Services
- Provider Business Services
- Provider Coding Services

Service Level Accountability

Corporate Services
Health Services Division

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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

Coaching & counseling is collection strategy

Easier payment management

Engage patients in their next service and follow-up care

KPIs: measure patient satisfaction and business metrics

Patient Centric Experience

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Strategic Collaborations: Centralized Recruitment & Point of Service

Ensuring a Single Voice
Patient Access Relationship Model

Standardizing Point of Service Across Culturally and Geographically Disparate Sites

Patient Access Relationship Model

- CFOs
- Administrators
- Clinical Operations
- Site Patient Access Directors
- Staff Members

Sound Business Practices

Patient Centered Care

Extraordinary Patient Experience

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**Revenue Cycle Relationship Support Model Overview**

### Purpose

Support the patient experience & sound business practices through a better, more efficient revenue cycle relationship support model:

- Customer collaboration
- Alignment of subject matter expertise to operational needs

### Focus Areas

<table>
<thead>
<tr>
<th>Hospital</th>
<th>Ambulatory</th>
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</thead>
<tbody>
<tr>
<td>• Inpatient</td>
<td>• Physician Offices</td>
</tr>
<tr>
<td>• Same Day Surgery</td>
<td>• Hospital Ancillary Outpatient Departments</td>
</tr>
<tr>
<td>• Emergency Department</td>
<td>• Hospital-Based Clinics</td>
</tr>
<tr>
<td>• Procedural Areas</td>
<td></td>
</tr>
</tbody>
</table>
Centralized Support Group: Responsibilities

- Revenue Cycle Support & Relationship Management
- KPI's & Benchmarks, Quality Feedback
- FTE Recruitment, Training & Placement
- Implementation Assessment & Support
- Optimization Opportunities
Confidence in the UPMC Patient Experience

Excellent Customer Service

Reliable Outcomes

Materials & Resources for Patient Financial Education

Most insurance plans have out of pocket costs that may result in a copay, deductible or a maximum out of pocket.

If you like, we can assist you in contacting your insurance company to better understand your health benefits.

We have a financial counselor in the facility that can explain your out of pocket expenses or I can request an appointment through our patient concierge service to go over your expenses at a convenient time.

You are in our thoughts.

Welcome back!

Standardized Scripting

Standardized Access Methodology

Thank you for choosing UPMC!

Thank you for being a UPMC Health Plan member. I have everything ready for you.

Are you satisfied with your service today?

Have I answered all of your questions?

When would you like to be seen?

Hello Ms. Jones, nice to see you again!

I see you were in the ED last night. I have all of your information

We knew you were coming and are completely prepared for your visit.

You don’t think you can afford to pay? We have financial counselors who can assist you with reviewing options. What time works best for you so that I may have them contact you?

Most insurance plans have out of pocket costs that may result in a copay, deductible or a maximum out of pocket.

You are in our thoughts.

Welcome back!

Confidence in the UPMC Patient Experience

Excellent Customer Service

Reliable Outcomes

Resources & Tools for a Unified Patient Centric Experience

Thank you for choosing UPMC!

Have I answered all of your questions?

Thank you for being a UPMC Health Plan member. I have everything ready for you.

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Welcome back!
Centralized Recruitment: Meeting Site-Specific Needs with Standardized Training

- Daily communication between Point of Service managers, Regional Directors & Centralized Recruitment
- Staff cross-training on Hospital & Physician systems: Epic & Medipac
- On-site training at both Hospital & Physician front desks
- Standardized skills, training & processes across all UPMC locations: “Language of Access”
Redesigned Training Promotes a Single Voice

$\textbf{Before}$

- 5 days of classroom-based training

$\textbf{Limited geographical and temporal flexibility}$

$\textbf{After}$

- 3 days of Computer-Based and one-on-one training paired with On-Site exposure

- $\textbf{Computer-Based Training}$ paired with a remote-based trainer

- $\textbf{Toolkits:}$ Stand-Alone Modules paired with specialty add-ons to tailor training to specific job functions

- $\textbf{On-Site Exposure & Mentoring}$ integrated into training schedule to solidify skills with real world exposure

Provides Centrally Recruited Staff the \textit{Flexibility & Customization} Needed to Promote Regional Access While \textit{Maintaining Standardization}
Currently Staffing to Maximum Volume Needs:
4 Access FTEs per day

Maximum Volume Needed:
8-11am, 1-2pm only

Mondays and Thursdays are typically low volume
Central Staffing Model

A Week with Volume-based Staffing

Total Savings with Volume-Based Staffing: 1.8 FTEs

Front Desk FTEs and Floater Support Mapped Back to Individual Department Cost Centers

- **Monday/Wednesday**: One Floater During Peak Hours (8-11am, 1-3pm)
- **Tuesday**: Two Floaters During Peak Hours

2 FTEs Staffed Full Time at Desks
105 Check-ins per day

Departments receive familiar faces as floaters
Revenue Cycle Recruitment Overview

Recruit, Place, Onboard & Train Access Staff to Support a Patient Centric Revenue Cycle

Direct Hires
- Staff are placed directly into a permanent role

Floater Pool
- Staff are placed in a pool of access staff to cover temporary needs
Talent Acquisition – Who are the Revenue Cycle customers?

• Central Contact Center
• Physician Services Division Front desks in Allegheny County
  – Providing service at more than 340 unique locations
• Emergency Department & Same Day Surgery Front Desks
• Floater Pool
  – Staff trained to work on specific projects and backlogs to minimize the use of overtime
  – Project work included charge edits and denials, charge entry, customer service and pre-registration
• Treasury
• Billing
• Office of Physician Relations
• Coming Soon: All of Revenue Cycle
Revenue Cycle Talent Acquisition
Mission and Scope

Goals
• Provide consistency in staffing and training
• Contribute to overtime reduction/cost savings
• FMLA
• Simplified recruitment process
• Minimize time frame of vacancies

Services
• Recruitment
• On-boarding
• Intermittent coverage (vacancies, volume-based staffing)
• Staff management/Placement

Place of Service Coverage
• Physician Front Desks
• Emergency Department
• Same Day Surgery
• Central Contact Center
• Hospital-Based Clinics, Ancillary Services, Centers for Rehab Services, and Cancer Centers
Centralized Recruitment Advantages

Applicants
- Simplified, consistent hiring process
- Reduced time to placement
- Consistent training/orientation

Human Resources
- Applicant one-touch processing
- Streamlined workflow
- Collaboration instead of competition

Site Management
- Focus on value-added hiring steps
- Appropriate candidate-opportunity matching
- Cost-effective staffing

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TA Goal: Feed the Funnel

1. Grow applicant volume (campus outreach, marketing, grass roots connections)
2. UPMC Values Assessment (living our values creates a Single Voice)
3. Phone Screen (values and motivational fit-based)
4. Interview
5. Hire
Centralized Revenue Cycle Selection
Workflow

Applicants complete an online application (including an assessment)

Qualified applicants undergo phone screening by TA

Hiring team interviews & places candidates

Partner with site management to approve all direct hire offers

Candidates are recommended for Direct Hire or Floater Pool

TA extends offer, completes background screening and schedules orientation
Centralized Recruitment – Success Factors

- Leadership
- Relationship Management
  - Human Resources
  - Training
  - Customers
- Technology
- Key Performance Indicators
Centralized Recruitment & Training

- Onboarding Consistency
- Ensuring staff receive necessary job skills and training for success
- Training
  - Scheduling & Billing Systems
  - Customer Service/soft skills
  - Insurance fundamentals
  - Upfront self-pay collections
  - Cross training and site/skill specific training
  - Mandatory Online Training (ULearn)
- Orientation Checklist
- Policy/Procedure Review
- Systems Security
Centralized Recruitment & The Customers

Open communications with site and administrative management

Survey Monkey - Customer Surveys
• Survey questions quantify and qualify experience over time
• Offices requesting floaters offered satisfaction survey based upon assignment type

Survey Monkey - Staff Surveys
• Orientation for Floaters
• Floater Pool Shiftboard
• Floater Pool Experience
• Floater Pool Assignment Review
• Direct Hire Survey

Ongoing communication with site management regarding needs, volumes and staff performance along with expanded Survey Monkey utilization
Centralized Recruitment KPIs

**Recruitment Tracking**
- Position open/filled
- Days to fill open position in pool/site
- Select International
- Days to direct hire

**Interview Tracking**
- Interviews per day/open position
- Interviews completed per week/FPS management
- Monthly measure utilizing working days

**Staff Tracking**
- *Example:* Biweekly Call Center Agent Report Cards
- *Example:* Patient Information Coordinator (Front Desk) Report Cards

**Resource Allocation**
- Staffing request fulfillment/denial rate by request type
- Casual Staff availability/deployment rate

**Service Satisfaction**
- Customer base
- Staff
Supporting an Agile Business Model

*Strategic Collaborations:* Centralized Recruitment & Central Contact Center
Central Contact Center

The Patient

Workforce Management

Central Scheduling Contact Center

Decentralized Ancillary Schedulers

Decentralized Department Schedulers “Virtual Call Center”
### Contact Center Overview

- **24/7 Consumer Contact Center**
- **3.5 Million calls handled per year**
- **5,657 Online Chat interactions per year**
- **129 Virtual Call Centers**

- Welcome Calls
- Scheduling
- UPMC Insurance Hotlines
- Price Estimation Team
- Consumer Referral Service
- Financial Assistance
- Discharge Planning
- Customer Service
- Answering Service

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Implementing New Initiatives

Standardized Agility in a Dynamic Healthcare Market

Work Force Management

Centralized Recruitment Model

Example new Initiative: Insurance Hotline

Scheduling

Customer Service

Ensure Success of New Initiatives

✓ Workforce management shifts experienced agents
✓ Centralized recruitment backfills positions
Optimizing Call Center Employee Utilization & Performance

NICE IEX Workforce Management

- Provides accurate staffing and capacity planning according to call volume
- Long and short-term forecasting
- ‘What-if’ analysis
- Real-Time and Intra-day change management
- Historical adherence and reporting
- Centrally managed by Workforce staff
- Ability to plan and staff around shrinkage
You can’t manage what you don’t measure

Centralized Recruitment Outcomes
Creating a Streamlined Hiring Process

What We Measure:

- Direct Hires to various hospitals, physician practices and consumer contact center (including new insurance line placements)
- Floater resource pool hires
- Permanent placements form the floater resource pool to various hospitals, physician offices and consumer contact center
- Internal Transfers
- Face to Face interviews, average 6 per day
Direct Hires: Increased Demand in Service
Direct Hires: Rapid Placement
Front Desk KPIs

- KPIs measured, reported and trended centrally. Business Units held accountable.
- Registration Updates
- Check In Volume
- Same Day Appointment Volume
- Appointments by Phone Volume
- Total Appointments Scheduled
- Daily Average Check In
- Daily Average Same Day Appts
- Patient Wait Time (EpicCare sites)
- Patient Liability Copay, Coinsurance, Deductible, Prepayment, other patient payments
- 72 Scheduling
- Charge Posting Reconciliation
- Validation and verification of Privacy/TPO/HIE on Account
- HealthTrak Adoption
- Concierge Form Usage
- QA Results
- Utilization of FYI Notes
- Offered concierge services
- Offered to schedule follow up appointment
- Advised of MyUPMC activation number
## Department Report Card – User Level

<table>
<thead>
<tr>
<th>Name</th>
<th>Login ID</th>
<th>Job Title</th>
<th>Avg Daily Check In</th>
<th>Avg Daily Scheduling</th>
<th>Avg Daily Referrals</th>
<th>Avg Daily Edits/Denials/EDIs</th>
<th>Avg Daily UPAY Tx</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Front Desk User 1</td>
<td>USER1</td>
<td>Access Lead</td>
<td>0.80</td>
<td>6.70</td>
<td>0.00</td>
<td>0.15</td>
<td>1.70</td>
<td>8.43</td>
</tr>
<tr>
<td>Front Desk User 2</td>
<td>USER2</td>
<td>Access Lead</td>
<td>0.05</td>
<td>24.30</td>
<td>0.00</td>
<td>0.00</td>
<td>22.60</td>
<td>35.65</td>
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<tr>
<td>Front Desk User 3</td>
<td>USER3</td>
<td>Patient Information Coordinator</td>
<td>0.90</td>
<td>23.20</td>
<td>0.00</td>
<td>0.00</td>
<td>14.15</td>
<td>31.18</td>
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<tr>
<td>Front Desk User 4</td>
<td>USER4</td>
<td>Patient Information Coordinator</td>
<td>31.20</td>
<td>16.10</td>
<td>0.00</td>
<td>0.00</td>
<td>10.65</td>
<td>52.63</td>
</tr>
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</table>
Increased Overall Placement
Enhanced Customer Satisfaction

*Increased recruitment delayed December survey processing
Lessons Learned

Department Buy-in
– Ensure departments appreciate centralized work efforts

Open Communication
– Develop a positive rapport with managers
– Avoid silos

Designated staff
– Talent Acquisition: Turn positions around quickly
– Centralized Recruitment team: Know the ins and outs of each customer

Patience
– Remember change doesn’t happen overnight
Looking Ahead

- Shiftboard direct entry: Allow managers to view across their service line, identifying front desk needs and assisting with staff movement for coverage.

- Enhanced volume-based staffing: Use Central Recruitment as our Patient Information Coordinator Traffic Control.

- Expansion of Select International (Behavior Screening) process.

- Recruitment of revenue cycle billing staff.
"There's a way to do it better—find it."

— Thomas Edison
Questions?