TRINITY MOTHER FRANCES HOSPITALS AND CLINICS

Robert Jehling
Associate Vice President and Chief System Access & Patient Experience Officer
Robert Jehling is responsible for working in collaboration with Hospital and Clinic leadership to create, implement, and measure new processes and concepts that drive a consistent best-in-class patient experience. He leads System patient access efforts, including the management of Centralized Scheduling and Insurance Verification Contact Centers (Physician1Call), as well as the System business development team and physician relations team. Robert is a graduate of the University of Pittsburgh and has over 18 years of executive leadership experience in the development and management of sales & marketing divisions, global call centers, and customer experience systems for several Fortune 100 companies, inclusive of AT&T and EFH (Energy Future Holdings).
Who We Are

- **Mother Frances Hospital:**
  - Built in 1937 by Sisters of the Holy Family of the Nazareth

- **Trinity Mother Frances Hospitals and Clinics**
  - Came together in 1995 when merged with Trinity Clinic
  - Serves 1.2 million people in a 27-county area
  - 4000+ employees; 700+ providers
  - One integrated EMR since 2012
RETAIL PATIENT EXPERIENCE
What is Patient Experience?

“The sum of all interactions, shaped by an organization’s culture, that influence patient perceptions across the continuum of care.”

- Jason A. Wolf, PhD, the Beryl Institute
Purpose: DELIVER A PATIENT EXPERIENCE that is:

- Exceptional
- Consistent
- Efficient
- Delivers at all touch-points: Phone, POS, Administrative, Clinical

Customer Experience must be best-in-class, uniform, and seamless to drive:

- A Memorable, Share-with-Friends Experience for our Patients
  Every experience-every time
- Increases Patient Satisfaction
- Drives Brand Loyalty
3 Primary Decision Factors

- **Product Quality**
  - Value Proposition
- **Price**
  - Price-point Proposition
- **Service**
  - Customer Experience

Delivering on the SERVICE factor for consumers is the easiest, most controllable, and least expensive way to elevate your business.
Our Customer Experience is as good or as bad as we allow it to be.
Why a Retail Patient Experience?

- A Superior Customer Experience is a MUST for any Business that wants to Excel
- Poor Reputation of Health Care Industry for Customer Service
- Sensitivity of Health Care Patients
- Competitive Marketplace
- Ease of Delivering a Superior Customer Experience
- HCAHPS/CGCAHPS Survey and Financial Impacts
- Access
Patient Experience Reversal

- [https://www.youtube.com/watch?v=SMzl9_0KGeo](https://www.youtube.com/watch?v=SMzl9_0KGeo)
A Lesson from Starbucks

Create a **Franchise Model** that drives a *consistent* customer service experience across all patient facing entities

- Customized by operating entity
- Bound by common core beliefs
- Culture -Driven
- Great Reputation
- Continuously Improving
Retail Patient Experience

- **Methodology**
  - *Single Overarching Customer Experience Mantra/Process*
  - *Create a culture, not a script*
  - Department/Job Specific Training:
    - "Success is defined at the department level….”
      - Process is augmented to drive the “Retail Key 3” in terms of consistent experience
        - Baseline
        - QC Matrix
        - QC Joint Scoring
        - Culture of Follow the Leader
  - Training tailored to process utilization of job/department
  - Training sequence to follow hierarchy of patient lifecycle
    - Phone Facing Entities
    - POS Entities (Clinics/Registration)
    - Clinical (Clinics/In-Patient)
What is Quality Assurance?

“You can’t Manage what you don’t Measure.”

• Quality Assurance is an ongoing business activity that provides valuable insights into rep, customer, and service delivery performance.

• The primary goal of any QA program is to verify and ensure that a company’s customer service meets or exceeds internal requirements and customer expectations.

• Quality assurance isn’t an option for good customer service. It’s essential for success.
Audience Polling Question 3

- Has your hospital created a set of patient satisfaction metrics that you use to assess patient satisfaction?
  - Yes
  - No
  - I don’t know/not applicable
Quality Assurance

- Structured QA process with systematic monitoring and scoring of customer experience by individual, department, and location
- Calibration sessions conducted to measure SWOT
- Patient surveys/Focus Groups
- On-Site Observations
- Secret Shopping
Retail Patient Experience Initiative

CUSTOMER EXPERIENCE & QUALITY ASSURANCE

Baseline Call Monitoring, Secret Shops, Observations

S.W.O.T Analysis
Strengths-Weaknesses-Opportunities-Threats

QA Criteria, Scoring, and Training Development, Training Deployment

Calibrations/Coaching

Performance Management

QA Evaluation via Call Monitoring, Secret Shops, and Observations
## Quality Assurance Evaluation

<table>
<thead>
<tr>
<th>Category</th>
<th>Question</th>
<th>Yes or No</th>
<th>Point Value</th>
<th>Point Awarded</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>WARM WELCOMES</strong></td>
<td>Did the employee greet the CALLER with the correct intro?</td>
<td>Y</td>
<td>5</td>
<td>5</td>
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<td>Did the employee provide their name?</td>
<td>Y</td>
<td>5</td>
<td>5</td>
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<td>Did the employee ask for the caller’s name as part of the greeting?</td>
<td>Y</td>
<td>5</td>
<td>5</td>
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<td>Was the CALLER acknowledged by name and then asked for the purpose of their call?</td>
<td>Y</td>
<td>5</td>
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<td>Did the employee deliver greeting in a warm, inviting tone?</td>
<td>Y</td>
<td>5</td>
<td>5</td>
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<td><strong>MEMORABLE MOMENTS</strong></td>
<td>Did the employee make any statements indicating an eagerness to assist the CALLER?</td>
<td>Y</td>
<td>7.5</td>
<td>8</td>
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<tr>
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<td>Did the EMPLOYEE explain to the CALLER that they need some information to process the request?</td>
<td>Y</td>
<td>5</td>
<td>5</td>
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<tr>
<td></td>
<td>Did the employee ask the CALLER for detailed information such as who, what, when, where, etc.?</td>
<td>Y</td>
<td>5</td>
<td>5</td>
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<td>Did the Employee address the CALLER using their name at least twice during the call?</td>
<td>Y</td>
<td>5</td>
<td>5</td>
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<td>Did the Employee use courtesy terms such as please and thank you throughout call?</td>
<td>Y</td>
<td>5</td>
<td>5</td>
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<td>Did the employee listen to the CALLER?</td>
<td>Y</td>
<td>5</td>
<td>5</td>
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<td></td>
<td>Did the employee keep the patient informed/engaged throughout the call while avoiding long gaps of silence? If put on hold, did the TMF employee ask the caller for permission?</td>
<td>Y</td>
<td>5</td>
<td>5</td>
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<td>Did the employee effectively resolve the CALLER’s issue or provide a satisfactory alternative and in a timely manner?</td>
<td>Y</td>
<td>15</td>
<td>15</td>
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<td>Did the employee demonstrate empathy for the CALLER (if appropriate)?</td>
<td>Y</td>
<td>5</td>
<td>5</td>
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<td><strong>GRACIOUS GOODBYES</strong></td>
<td>Did the employee reiterate the solution and confirm understanding?</td>
<td>Y</td>
<td>7.5</td>
<td>7.5</td>
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<td>Did the employee confirm that all the CALLER’s needs were met?</td>
<td>Y</td>
<td>5</td>
<td>5</td>
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<td>Did the employee thank the CALLER for calling or choosing TMF?</td>
<td>Y</td>
<td>5</td>
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</table>

**AUTO-FAIL - Was the TMF Employee rude or condescending, insensitive, or dismissive?**

<table>
<thead>
<tr>
<th>Yes or No</th>
<th>Point Value</th>
<th>Point Awarded</th>
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<tr>
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<td>100</td>
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Patient Experience Evaluation

**Purpose:**
- To evaluate the access & customer experience from the lenses of an actual patient

**Evaluation Methods:**
- Patient Surveys
- Clinic Observations
- Phone Shops
- Live Patient Shops
- Competitor Patient Shops
Patient Experience Evaluation Process Flow

Step 1
- Live Surveys conducted to Baseline Experience/Patient Perceptions

Step 2
- Independent Firm conducts Secret Shops to Validate or Invalidate Customer Experience/Patient Perceptions and general clinic observations of Patient Lifecycle management and traffic process flow

Step 3
- Independent Firm conducts Competitor Secret Shops to Baseline Performance
Patient Experience Evaluation Components

Survey Baseline
- Target Patients 24-48 hrs post appointment
- 50-100 Contacts
- Rating 10-point Scale

Phone Experience
- Customer Service
- Access (Hold Times)
- Process

Walk-In Clinic Experience
- Phone
- Pre Exam
- Clinical
- Post Exam

Clinical Appointment
- Pre Exam
- Clinical
- Post Exam

Competitive Shops
- Competitor 1
- Competitor 2
- Competitor 3
- Competitor 4
- Competitor 5
Output – Actionable Intelligence

Summation:
SWOT Analysis
Observations
Recommendations
MEASURING WHAT YOU MANAGE
Billing QA Scores

Jan-14: 76
Feb-14: 85
Mar-14: 86
Apr-14: 87
May-14: 86
Jun-14: 84
Jul-14: 91
Aug-14: 87
Sep-14: 88
Oct-14: 91
Nov-14: 90
Dec-14: 91
Jan-15: 90
Feb-15: 90
Mar-15: 88
Clinic QA Scores – Primary Care

![Graph showing Clinic QA Scores from November 2013 to March 2015. The scores range from 61 to 86 with a general upward trend.]
Clinic QA Scores – Specialty Care


69  65  74  79  83  82  82  84  85  88  87  87
Appointment Scheduling Experience Rating

- **Patient's Rating of 10**: 25%
- **Patient's Rating of 8-9**: 5%
- **Patient's Rating of 6-7**: 1%
- **Total**: 68%
Visit/Point of Service Experience Rating

- Patient's Rating of 10: 74%
- Patient's Rating of 8-9: 23%
- Patient's Rating of 6-7: 3%
- Patient's Rating of 5 and below: 28%
IF THERE WAS ONE IMPROVEMENT YOU WOULD LIKE TO SEE MADE, WHAT WOULD THAT BE?

- More/Sooner/Easier Appointment Scheduling: 22%
- Other: 13%
- Clinic Facility Improvements: 9%
- Shorter Office Wait Times: 7%
- Physician Effort/Attitude: 7%
- Friendlier/More Helpful Office Staff: 6%
- MyChart Issues: 6%
- Billing/Cost: 4%
- Dislike/Improve Automated Phone System: 4%
- Better Referral Options: 4%
- Return Calls to Patients: 4%
- Communication with Patient/Regarding Patient: 4%
- Better/More Parking: 4%
- Poor ER Experience: 2%
- More/Closer Clinics: 2%
- Better/Faster Check-In Process: 2%
- Better Directions/Signage: 2%
- More/Sooner/Easier Appointments: 2%

hfma healthcare financial management association
map virtual conference
METRICS
Centralized Patient Access Metrics

Create true virtual call center structure and functionality

- ACD Structure and Reporting
- Correct alignment of teams by functionality
- Align internal working model to external client functionality
- Culture, team building, workplace of excellence, hunting ground for recruitment to other areas of TMF/Industry
- Structured telephony Reporting and Performance Management
Centralized Patient Access Metrics
Centralized Patient Access Metrics

Training

- ACD Structure and Reporting
- Correct alignment of teams by functionality
- Align internal working model to external client functionality
- Culture, team building, workplace of excellence, hunting ground for recruitment to other areas of TMF/Industry
- Structured telephony Reporting and Performance Management

P1C Quality Assurance/Customer Experience Scores*
Centralized Patient Access Metrics

Build basic reporting and dashboards to drive performance and efficiencies

• Performance Management Model
• Quality Assurance Model: P1C Daily Scorecard/P1C System-Wide Weekly Scorecard
• SWOT Analysis and Troubleshooting Tools
Centralized Patient Access Metrics

Implement Robust Provisioning Quality Assurance Management Program

- Comprehensive daily audit of 150+ Transactions performed within P1C by team functionality
- Structured Audit Reporting and Performance Management Process
- Circular feedback loops to clinics on reoccurring errors or issues at clinic level

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<tr>
<th>P1C Audit Performance</th>
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<tbody>
<tr>
<td><strong>P1C Combined</strong></td>
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<td>Date</td>
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| OPS | Scheduling Events | Audits Performed | Percentage Audited | Errors Detected | Error Rate |
| IV  | 580 | 59 | 10.60 | 0 | 0.00 |
|     | 1-Nov-13 | 486 | 47 | 10.64 | 1 | 2.13 |
|     | 31-Oct-13 | 542 | 55 | 10.15 | 1 | 1.82 |
|     | 30-Oct-13 | 529 | 53 | 10.60 | 1 | 1.98 |
|     | 29-Oct-13 | 570 | 57 | 10.60 | 2 | 3.51 |
|     | 28-Oct-13 | 621 | 63 | 10.14 | 1 | 1.50 |
|     | 26-Oct-13 | 496 | 50 | 10.68 | 1 | 2.00 |
|     | 24-Oct-13 | 543 | 55 | 10.13 | 1 | 1.82 |
|     | 23-Oct-13 | 588 | 59 | 10.63 | 0 | 0.00 |
|     | 22-Oct-13 | 450 | 49 | 10.60 | 1 | 2.04 |
|     | 21-Oct-13 | 595 | 60 | 10.12 | 0 | 0.00 |
|     | 19-Oct-13 | 550 | 55 | 10.60 | 0 | 0.00 |
|     | 9-Oct-13 | 527 | 53 | 10.68 | 0 | 0.00 |

| OPS | Scheduling Events | Audits Performed | Percentage Audited | Errors Detected | Error Rate |
| OPS | 80217 | 8707 | 15.93 | 246 | 2.91 |
Questions?

Robert Jehling, AVP
Chief System Access
& Patient Experience Officer
903-606-7729
robert.jehling@tmfhc.org