Partners Patient Service Center Update

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The Patient Service Center (PSC)

- The Patient Service Center (PSC) is the centralized outpatient registration and outpatient insurance referral department within Partners Healthcare

- The PSC currently supports BWH, MGH, NSMC, NSPG, NWH, PCPO and SRH, accounting for ~61% of outpatient departments with the Partners system

- The PSC is made up of 180 full time employees, this includes:
  - 88 Registrars
  - 82 Referral Coordinators
  - 8 Training and Business Operations Support
  - 2 Practice Liaison Support

September 2018 Registration:
  - Handled 41,502 inbound phone calls
  - Processed 876,027 Registration Accounts

September 2018 Referrals:
  - Handled 16,358 inbound phone calls
  - Processed 98,626 Referral Accounts

PSC Registration Team

- Registration Representatives Create new medical record numbers (MRNs) for patients, employees, and volunteers who are seeking treatment or employment within a Partners entity.

- Resolves insurance and registration related errors via exception based worklist. Examples include:
  - No coverage
  - PCP mismatch
  - Ineligible coverage

- Receives inbound phone calls from patients, practices, and express phones.

- Places outbound calls to patients to resolve work queue edits if they are unable to resolve through payer websites.

PSC Referral Team

- Referral Representatives work all appointments that are determined to require a referral, based on Epic's benefit engine.
  - Accounts will qualify for a PSC work queue once the visit is scheduled and meets both of the following criteria:
    - The scheduled department is PSC supported
    - Insurance payer is contracted i.e. PSC supported

- The PSC will make **three attempts per date of service** to obtain a referral or to resolve any issue that is preventing a referral from being obtained. For example a PCP discrepancy.

Internal Referrals
- The PSC is delegated by the majority of Partners PCP's to generate referrals to PHS specialists.

External Referrals
- Referral Representatives will place outbound phone calls to Non-PHS PCP offices to initiate referral requests.

PSC Focus

1) Over the past year, the PSC has embarked on **improvements to core operations** with a number of initiatives spanning:
   - Organizational Structure
   - Process Efficiency
   - Performance Management
   - Resource Deployment
   - Entity Communication
   - Technical Updates
   - Staff Engagement

2) The PSC faced **performance challenges** driven by expected **beginning of year volume surges**, particularly for inbound call volume

3) Over January and February, the PSC focused on **stabilizing performance in the face of heightened seasonal volume** and **planning for upcoming Medicaid ACO changes**

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What we're doing to improve – initiatives fall into 6 buckets

	Overview	**Progress to date (completed date)**
1 Org Design	▪ Optimize team staffing levels, update managerial spans/layers, and clearly define team roles and responsibilities	▪ Developed new organizational design (11/16) ▪ Brought in additional temporary and permanent staff to improve workflow output (12/26) ▪ Posted open positions and began interview process (1/24)
2 Process Improvement	▪ Establish workforce management measures to assign staff where they are needed most (Calls vs OnTrac vs Epic) ▪ Develop process improvement recommendations based on end-to-end process mapping	▪ Implemented workforce management measures to efficiently allocate resources – used a "waterfall approach" to distribute incoming calls throughout the day (Reg: 1/8, Ref: 1/22) ▪ Documented life cycle of accounts and identified areas where PSC process could be more efficient – implemented process efficiency improvements (12/5)

3 Performance Management	▪ Develop performance management measures that allow managers to track staff performance and support both high and low performers to maximize their potential	▪ Established performance management measures: (Reg: 1/8, Ref: 1/22)
		   – Daily performance tracking
		   – Updated productivity targets
		   – 1 on 1 weekly coaching meetings
		   – Refresher training provided

4 Entity Relations	▪ Improve communication and coordination with entities to establish trusted department relationships	▪ Developed metric review meetings with entity leadership to discuss opportunities for improvement (12/10) ▪ Established recurring training and feedback sessions with entity staff (10/26)
5 Tech Updates	▪ Improve technical infrastructure across PSC to boost efficiency and reduce frustration	▪ Updating Epic WQ logic to improve accuracy of WQs

6 Engage Staff	▪ Develop a strong team culture and keep team satisfied and engaged	▪ Increased number of connected workers (work from home)
		▪ Moving to smaller team based meetings
		▪ Improved communication and transparency from leadership
		   – Monthly breakfast w/ PSC Director Bill O'Brien
		   – PSC Employee Focus Group

Performance Management and Workforce Management pillars will serve as a foundation to help drive future success

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PSC Performance Dashboard – September 14 2018

PSC KPIs showing weekly performance for the past 8 weeks
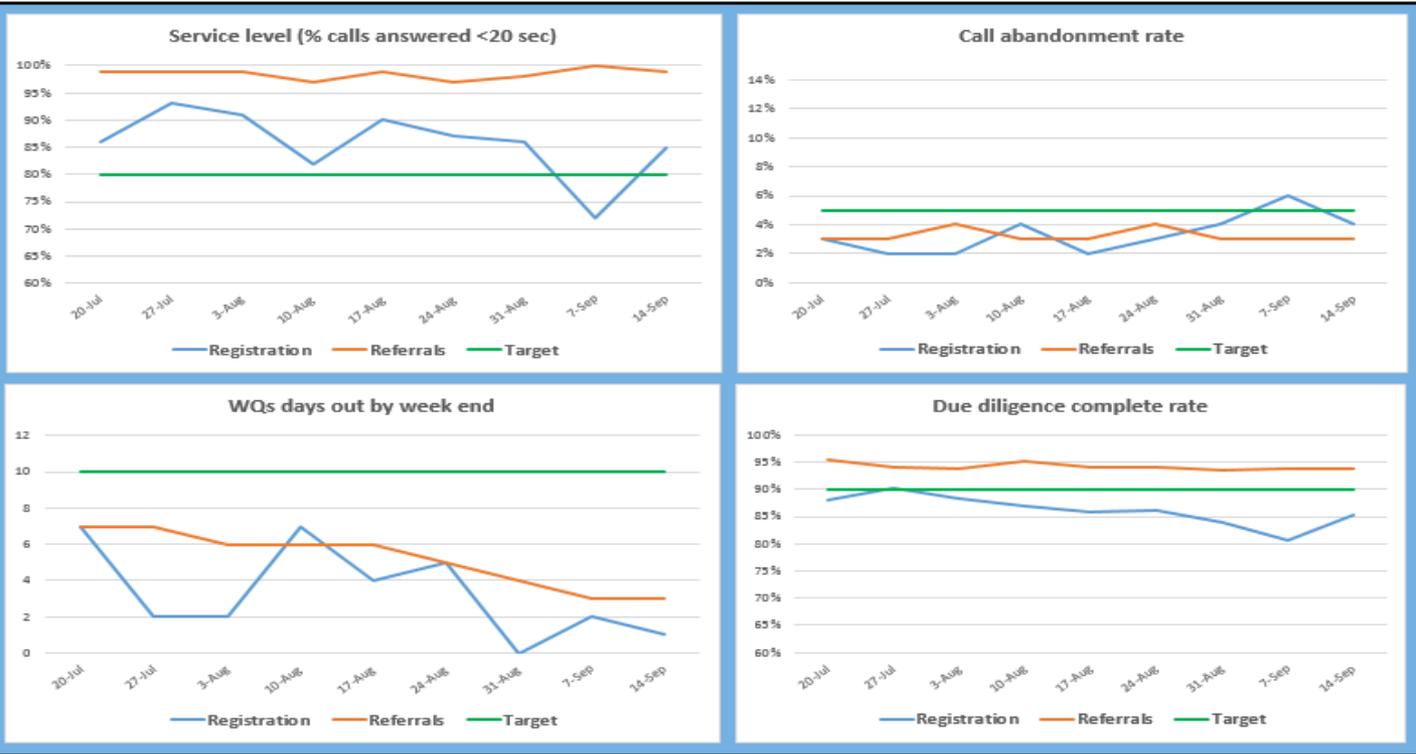
- "Service levels" are back to exceeding target.
- "Call Abandonment rates" are back to below 5%, as desired based on industry benchmark.
- "WQ days out" for Referrals and Registrations continue to be below target due to a RTE response issue. A resolution to this issue is being determined.
- Due Diligence Complete metric continues to exceed target for Referrals and below target for Registrations due to RTE issue and Cisco issue.

	Weekly Metric tracked	Current Week	Target	20-Jul	27-Jul	3-Aug	10-Aug	17-Aug	24-Aug	31-Aug	7-Sep	14-Sep
Registration	Service level (% calls answered <20 sec)	85%	80%	86%	93%	91%	82%	90%	87%	86%	72%	85%
	Call abandonment rate	4%	5%	3%	2%	2%	4%	2%	3%	4%	6%	4%
	Days out by week end	1	10	7	2	2	7	4	5	0	2	1
	Due diligence complete rate	85%	90%	88%	90%	88%	87%	86%	86%	84%	81%	85%
	Weekly Metric tracked	Current Week	Target	20-Jul	27-Jul	3-Aug	10-Aug	17-Aug	24-Aug	31-Aug	7-Sep	14-Sep
Referrals	Service level (% calls answered <20 sec)	99%	80%	99%	99%	99%	97%	99%	97%	98%	100%	99%
	Call abandonment rate	3%	5%	3%	3%	4%	3%	3%	4%	3%	3%	3%
	Days out by week end	3	10	7	7	6	6	6	5	4	3	3
	Due diligence complete rate	94%	90%	96%	94%	94%	95%	94%	94%	94%	94%	94%

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PSC KPI definitions and dashboard overview

		Definition	Purpose
1	**Service level**	▪ % of inbound calls answered within 20 seconds by the PSC (inbound calls include calls from patients and departments)	▪ To monitor call center responsiveness as a lever of customer service
2	**Call Abandonment rate**	▪ % of calls offered verses calls handled. (Industry benchmark is 5%)	▪ Provides visibility into the percentage of calls that were not handled
3	**WQ Days out**	▪ Number of days in advance of date of service PSC representatives are actively working accounts	▪ To measure how far in advance of date of service the PSC is beginning to work to financially clear a patient – full clearance can take up to 2 weeks to complete
4	**Due diligence complete**	▪ % of accounts where all expected tasks have been completed by the PSC by the patient's date of service	▪ Provides visibility into the rate at which the PSC is completing all requested tasks to financially clear a patient before the date of service – even if the patient is not cleared

These 4 metrics have been selected as KPIs to measure PSC performance. They are tracked weekly by entity and will be shared monthly with PSC leadership, entity leadership, and SteerCo.

What's next – our plan moving forward

Next Steps

1 Org Design
- Hire additional staff to increase output
- Implement updated organizational management structure

2 Process Improvement
- Implement automated workforce management tool
- Update Knowledge Management system with up to date payer information
- Execute additional efficiency improvement initiatives

3 Performance Management
- Establish attainable productivity targets and monitor team performance weekly
- Update Quality Assurance process to allow for direct and helpful feedback
- Establish incentive structure to reward high performing staff members

4 Entity Relations
- Build a performance dashboard to monitor department wide performance – share weekly with entity leaders
- Meet monthly with entity leaders to discuss successes and opportunities for improvement
- Re-establish practice relations team to maintain strong relationships with entity staff and to provide training as needed
- Create at risk report to be shared with each entity – report will include all incomplete accounts within 2 days of DOS

5 Tech Updates
- Automate manual trackers currently being used for workforce and performance management
- Update Epic WQ logic to ensure PSC WQs are accurate and comprehensive
- Investigate alternatives to OnTrac for productivity tracking and WQ creation

6 Engage Staff
- Develop a "coaching culture" – with an emphasis on development vs discipline
- Develop a career hierarchy for reps in the PSC
- Incorporate feedback into future processes across the PSC

With buy-in from the team and continued progress we feel confident that we will be able to reach our goals of maintaining T+14 days out with 80% service levels across the PSC

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Questions