Staff Engagement: Creating an Integrated Revenue Cycle Education Plan for All Patient Touch Points

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Today’s Speakers

**Suzan Dillery**  
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Suzan has 40+ years of experience in patient access. She served as Patient Access Manager for 23 years. She is a graduate of Indiana Tech, taught with Ivy Tech Corporate College, and worked as a consultant with Pearson Education. Today she works as a member of the Revenue Cycle Education Team. She is a certified patient access professional with HBI, a certified healthcare access manager with NAHAM, and a member of the NAHAM Education Committee.

**Norma Allen**  
Revenue Cycle Education Manager  
Community Health Network

Norma has 17 years of experience in various patient access and physician revenue cycle roles. Having begun her career in healthcare in a registration role, she has tremendous appreciation for trainers and mentors and attributes her career growth to a solid education program. Norma is a certified professional coder, certified professional biller, certified health access manager and has a Master of Science in healthcare administration from Valparaiso University.

**Michael Hosking**  
Senior Business Analyst – Revenue Cycle Analytics  
Community Health Network

Michael has seven years of mathematical data analytics experience (two years with the revenue cycle and five as a high school mathematics teacher). Today, Michael works with revenue cycle leaders performing project management and data analytics. Michael works closely with the Revenue Cycle Education Team on key project initiatives.
Learning Objectives

• Examine one organization’s process for developing an education team and training plan that connects all tasks and functions into the story of a patient’s visit and ultimately bridges the gap between the front and back ends of the revenue cycle.

• Explore strategies in hiring for role compatibility and long-term success as well as onboarding to promote revenue cycle-wide awareness.

• Learn of specific efforts to retrain existing staff on organizational priorities, such as point-of-service collections, financial assistance policies and procedures, and registration-related eligibility denials, among others.
Organizational Spotlight

Based in Indianapolis, Community Health Network is a nonprofit system with more than 200 patient care sites, including nine acute care hospitals and the largest primary care physician network in the state. In 2015, the system had nearly 54,000 admissions, performed nearly 97,000 surgeries, and provided 2.4 million ambulatory patient visits.

Key Stats

Hospitals .............................................. 9
Staffed Beds ................................. 1,049
Net Patient Revenue .............. $2.1B
Employed Practitioners .......... 2,450
Employees ................................. 14,400
Hiring for Success

• The first step toward developing an efficient, productive revenue cycle is attracting applicants and screening them to identify qualified candidates.
  – A mobile app allows job seekers to apply for open positions.
  – Employees can be a good source for referrals.
  – Leaders want to hire the right person for the job, even if it takes longer to fill the position.

Top Candidate Qualities

✓ Computer skills
✓ Customer service acumen
✓ Willingness to learn
Interviewing Strategically

- Candidates go through a staged interview process that includes meeting with multiple revenue cycle representatives after an initial HR screening.

Sample Interview Progression at Community Health Network

1. HR screens candidate by phone
2. Hiring manager calls candidate for second conversation
3. Initial revenue cycle interview
4. Second revenue cycle interview
5. Revenue cycle peer interview
6. Candidate hired
Interviewing Strategically (Cont.)

• During the multiple conversations held with a job candidate, interviewers use behavioral-based questions to learn more about how an individual would approach day-to-day tasks.

Example Behavioral-Based Interview Questions

• Could you describe a stressful situation encountered at work and how you responded?
• What is an example of a professional goal you set for yourself? How did you achieve it?
• In general, how do you deal with conflict in the workplace?
• Could you describe your time management skills and how you prioritize tasks?

The interviewer should expect the responses to behavioral-based questions to include the STAR method: Situation, Task, Action, and Result.

HR staff use similar tactics during the initial phone screening to ensure the candidate is qualified (e.g., has necessary education or experience) and truly interested in the position before additional interviews are scheduled.
Developing Staff Education

• After candidates have been screened and hired, the next step toward building a successful revenue cycle is to offer new-hire orientation to ensure they are familiar with internal processes, systems, and tools that will be used each day.
  – In April 2016, the system unveiled a new staff training initiative, the Revenue Cycle Education Team.

Factors Leading to Creation of Revenue Cycle Education Team

- After an EHR conversion, staff training revolved around system use
- This caused frequent back-end errors and high turnover in patient-facing positions
- New hires, especially, struggled to master revenue cycle concepts

New Team Created
Developing Staff Education (Cont.)

• The Revenue Cycle Education Team’s first project focused on point-of-service (POS) collections for patient access staff.
  – It later expanded to include physician practices to emphasize the initiative across the network.
  – It also included an e-learning component to explain to staff why front-end collections are so important.

The team performed **40+** POS collections training sessions in one month

Components of POS Collections Training at Community Health Network

- **Key Definitions**
- **100% Ask Expectation**
- **100% Document Interaction**
- **Scripting for Patient Objections**
- **Department Workflows**
• The team’s next objective was to create training surrounding revenue cycle core concepts for both new and existing employees so all staff could receive consistent messaging.
  – Training serves as a foundation for future courses.
  – Approximately 500 employees have completed this initial course.

Components Included in Onboarding and One-Day Intensive Courses

- Patient Selection
- Financial Class
- Payer Quick Guides
- Reading Insurance Cards
- Filing Order Rules
- Government Payers
- WellFund and Financial Assistance
- POS Collections
- Coverage Guidelines and Real-Time Eligibility
- Worker’s Compensation and Third-Party Liability Quick Guides
- Guarantor Matrix
- Valid Orders
- Consent to Treat/Notice of Privacy Practices

These topics are condensed into a one-day, intensive course for existing staff.

Training is offered through classroom instruction, interactive lessons, and e-learning.
Developing Staff Education (Cont.)

• With the foundation in place, the team’s focus was to ensure all staff have a holistic understanding of the revenue cycle (both the “hows” and the “whys”) and how one team’s functions affect another’s.
  – Onboarding and one-day intensive courses were extended to hospital and physician billing staff
  – Course offerings were enhanced to improve the overall revenue cycle IQ

Enhanced Course Offerings

• Onboarding for Patient Access and Physician Practice Patient Service Representatives
• Skills Builders
• WellFund and Financial Assistance
• POS Collections
• Every UB-04 Tells a Story
• Every CMS-1500 Tells a Story
• Transact Rx
• Denial Management and Prevention
Expanding the Education Team

• In the year since it was created, the Revenue Cycle Education Team has grown from three training specialists to seven due to training demand, need, and staff interest.
  – To meet this demand, leaders are exploring offering HBI’s E-Learning certifications and the team is guiding employees to courses offered by the Talent Development and Performance Improvement teams, such as The Emotional Intelligence to Lead, Behavioral Styles, and the Six Sigma certifications.
  – The team meets regularly and collaborates with the system’s EHR training staff for alignment with current and future training objectives.
  – Training specialists also are constantly striving to help revenue cycle staff understand how their roles affect others throughout the system.
• To assist with this effort, interdepartmental cross-training and shadowing are in the works.
Training to Maintain

• After staff have been trained to thrive in their roles, the final step toward building a successful revenue cycle is to retain team members, who now represent a significant investment of system resources.
  – HR is assisting with the creation of career ladders in all departments, which is expected to have benefits especially for retaining high-performing team members who wish to advance within the organization.
  – To support staff engagement, the team provides a staff newsletter called Training Matters to keep staff up-to-date on changes in the insurance world and any governmental or network communication.
  – The team also has a group email address readily available for staff questions.

One Strategy to Retain

HR is working on a remote worker policy to allow staff to work from home when appropriate, which is expected to be a satisfier for staff members desiring flexibility.
Rev Cycle Education Team Results

- The numbers only tell part of the story …
  - “Enjoyed the class, organized in a great manner.”
  - “Best by far. Great experience!”
  - “I felt the binder was so informative, I find myself still using it as a reference.”
  - “I think that this class helped me learn a lot of information for my position.”

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<th>Metric</th>
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<tr>
<td>Training Team Members</td>
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<td>% Dollars ED Eligibility Denials to All ED Denials</td>
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<td>31.8%</td>
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Future Plans

• To build on the success already achieved, the team is exploring other initiatives:
  – Additional, customized HBI E-Learning courses
  – Optimizing the system’s SharePoint site to serve as a repository for the most up-to-date information and revenue cycle references
  – Establishing a feedback loop with HR as a means to continuously improve the candidate screening and hiring process
  – Expanding training to include home health and behavioral health

• New courses under development internally include:
  – Organizational Overview/Master Person Index
  – Revenue Cycle Skills Assessment
  – Denial Management and Prevention
Questions?

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