Indian Health Service

Best Practices for Collaboration Between All Factors of the Revenue Cycle

BEVERLY ZUNIGA & LASHAWN RUIZ

PATIENT REGISTRATION & PATIENT BENEFITS COORDINATION TRAINING

MARCH 2024


hello
MY NAME IS


IT'S SURVEY TIME


WE WANT
YOUR
FEEDBACK!

Don’t Get Sick After June

We are the only race that has the LEGAL right to healthcare, yet we have the worse health & the most complicated healthcare system.

-David Tonemah, MBA

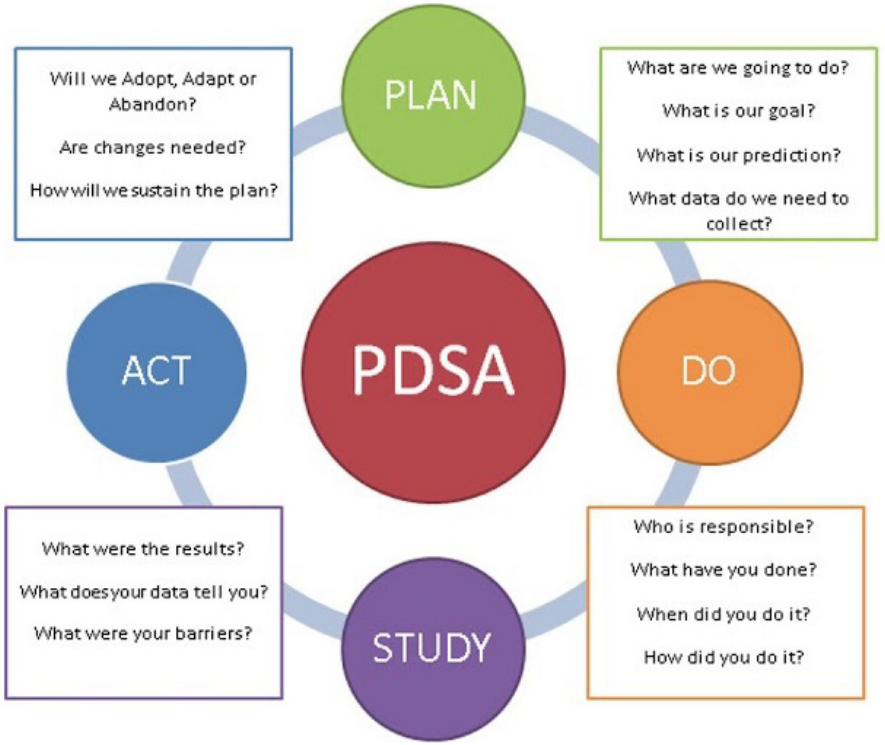
Why Collaboration Works

All parts of collaboration between departments MUST have the same mission and goals.

- To improve process and maintain/sustain the quality of data

- Bridges gaps
- Role clarity
- Creating and maintaining relationships between stakeholders
- Model for process improvement (small test of change, PDSA)

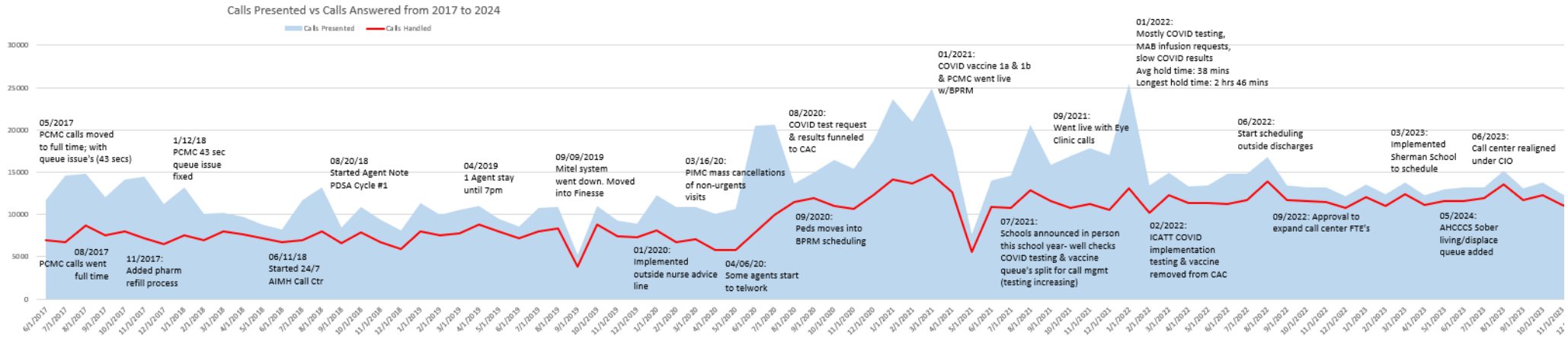
What is a PDSA?



Centralized Appointment Center

- Is an extension of the clinical care team and the primary entry fo access to care for many of the patients.
- Register new patients and conduct full registration over the phone.
- Will complete an update for returning patients.
- Pre-determine PRC eligibility for every appointment scheduled.
- Verify and enter private insurance for every appointment scheduled.
- Help provide PRC's scheduling information via EHR PRC Note.
- Is an important role in the revenue cycle and patient care.

Centralized Appointment Center



Call Center 2015	Transition State	Call Center Currently	Call Center Future *just add from current state
Pediatrics Primary Care Clinic Patient Business extension	American Indian Medical Home (AIMH) Hours of Operation 24/7 COVID Testing/Results COVID Vaccine Trialed Women's Clinic Trialed Purchased Referred Care	Pediatrics Primary Care Clinic Adult Nutrition Routine Eye Exams Audiology Sherman School AHCCCS Displacement	Add more aspects of Ophthalmology Add Switchboard x1200 calls and move 24/7 Considering Purchased Referred Care calls
No messaging to clinics Transferred out of scope calls Scheduled general routine patient care visits – only (3) scheduling scenarios	E H R communication between call ctr & clinic (Agent Note) Learn to read medication list Learn to read lab orders How to give negative COVID test results & document Increased medical terminology	E H R Agent Notes Schedule guidelines now include communication flow process for team based care (29 slides long) Must know how to read medication list, read orders, consults, PRC Note/general referral process & immunization record Call flow process for complex, high risk needs – RN Triage, or outside nurse advice line	Add Pharm-Tele Triage E H R note
Registration – Updates/New Charts Routine Alternate Resource Verification	Increased complex alternate resources (split entries by service) MRI/CT authorizations Work claim rejections/denials – reg related only Increased private insurance knowledge to include how PIMC works with other networks/HMO plans	Online alternate resource verification requires two step authentication Routinely work reg related claim rejections OB Valleywise alternate resource verification that includes communicating out network/HMO information Register most of all clinics new patients; including newborns Continue to update patients as schedule appts	Remove working reg related claims routinely; only for help All patients scheduled have network info & managed care plan PCP info; not just OB Add Medicare Secondary questionnaire to routine updates
RPMS for scheduling and registration	Mitel Application Software Telework capabilities/IT basic knowledge	Cisco Jabber Software/Finesse application VPN & Telework capabilities/applications In-depth knowledge of E H R navigation & notification MS Teams for communication RPMS & RPMS CRT & BPRM Various online application/websites for alternate resource verification	Possible change in phone system Remove RPMS for most of workload; only use for other possible business aspects. Use BPRM only.

Front Desk Registration

Update patients at check in – pre-determine PRC eligibility

Issue necessary forms – PRC Direct Care letter

Refer to a Benefit Coordinator

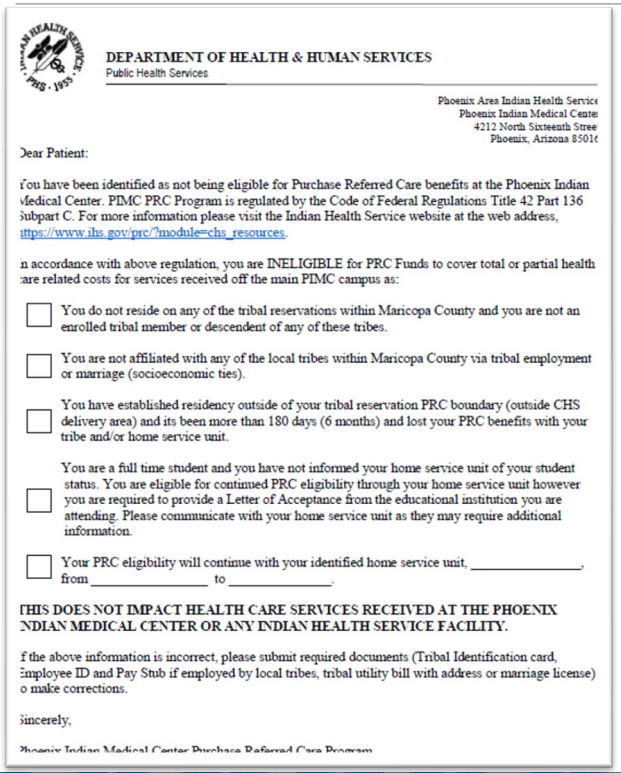
- Issued pre-vetted applications up front
- Issued a visual queue for clinical staff to see they need to see a BC

Participate in PRC Committee

Decentralized registration layout

- Strict standards
- Regular training

Registration & PRC



DEPARTMENT OF HEALTH & HUMAN SERVICES
Public Health Services

Phoenix Area Indian Health Service
Phoenix Indian Medical Center
4212 North Sixteenth Street
Phoenix, Arizona 85016

Dear Patient:

You have been identified as not being eligible for Purchase Referred Care benefits at the Phoenix Indian Medical Center. PIMC PRC Program is regulated by the Code of Federal Regulations Title 42 Part 136 Subpart C. For more information please visit the Indian Health Service website at the web address, https://www.ihs.gov/prc/?module=chs_resources.

In accordance with above regulation, you are INELIGIBLE for PRC Funds to cover total or partial health care related costs for services received off the main PIMC campus as:

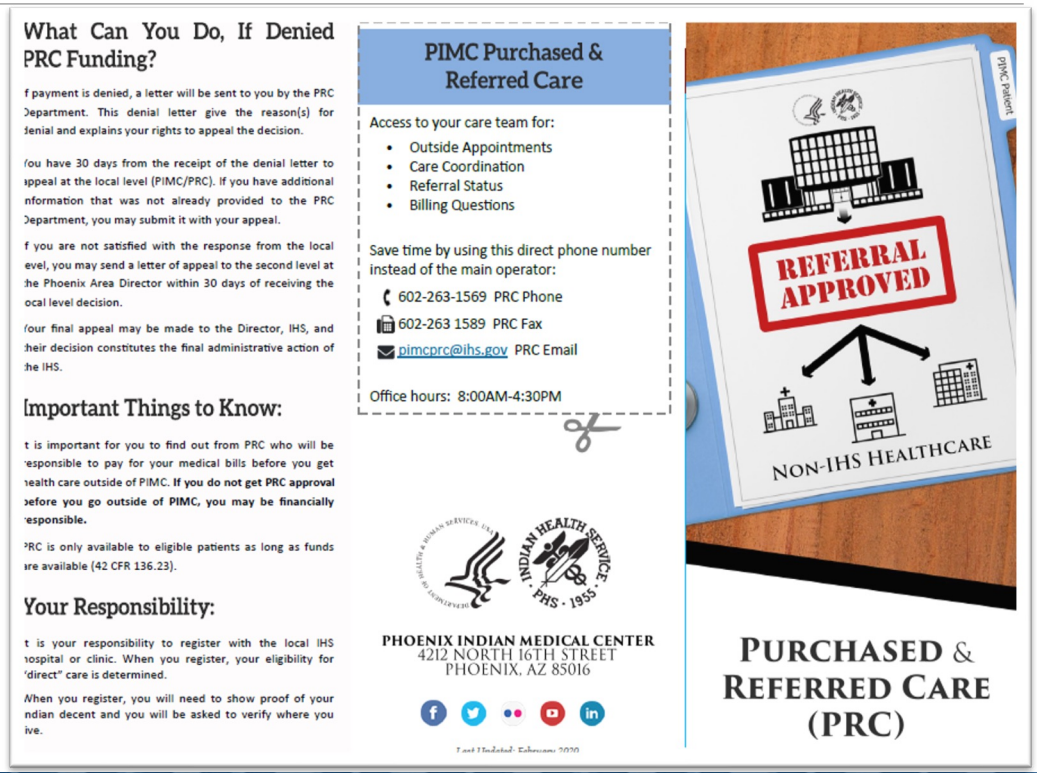
- ☐ You do not reside on any of the tribal reservations within Maricopa County and you are not an enrolled tribal member or descendent of any of these tribes.
- ☐ You are not affiliated with any of the local tribes within Maricopa County via tribal employment or marriage (socioeconomic ties).
- ☐ You have established residency outside of your tribal reservation PRC boundary (outside CHS delivery area) and its been more than 180 days (6 months) and lost your PRC benefits with your tribe and/or home service unit.
- ☐ You are a full time student and you have not informed your home service unit of your student status. You are eligible for continued PRC eligibility through your home service unit however you are required to provide a Letter of Acceptance from the educational institution you are attending. Please communicate with your home service unit as they may require additional information.
- ☐ Your PRC eligibility will continue with your identified home service unit, _____, from _____ to _____.

THIS DOES NOT IMPACT HEALTH CARE SERVICES RECEIVED AT THE PHOENIX INDIAN MEDICAL CENTER OR ANY INDIAN HEALTH SERVICE FACILITY.

If the above information is incorrect, please submit required documents (Tribal Identification card, Employee ID and Pay Stub if employed by local tribes, tribal utility bill with address or marriage license) to make corrections.

Sincerely,

Phoenix Indian Medical Center Purchase Referred Care Program



What Can You Do, If Denied PRC Funding?

If payment is denied, a letter will be sent to you by the PRC Department. This denial letter give the reason(s) for denial and explains your rights to appeal the decision.

You have 30 days from the receipt of the denial letter to appeal at the local level (PIMC/PRC). If you have additional information that was not already provided to the PRC Department, you may submit it with your appeal.

If you are not satisfied with the response from the local level, you may send a letter of appeal to the second level at the Phoenix Area Director within 30 days of receiving the local level decision.

Your final appeal may be made to the Director, IHS, and their decision constitutes the final administrative action of the IHS.

Important Things to Know:

It is important for you to find out from PRC who will be responsible to pay for your medical bills before you get health care outside of PIMC. **If you do not get PRC approval before you go outside of PIMC, you may be financially responsible.**

PRC is only available to eligible patients as long as funds are available (42 CFR 136.23).

Your Responsibility:

It is your responsibility to register with the local IHS hospital or clinic. When you register, your eligibility for "direct" care is determined.

When you register, you will need to show proof of your Indian decent and you will be asked to verify where you live.

Last Updated: February 2020

PIMC Purchased & Referred Care

Access to your care team for:

- Outside Appointments
- Care Coordination
- Referral Status
- Billing Questions

Save time by using this direct phone number instead of the main operator:

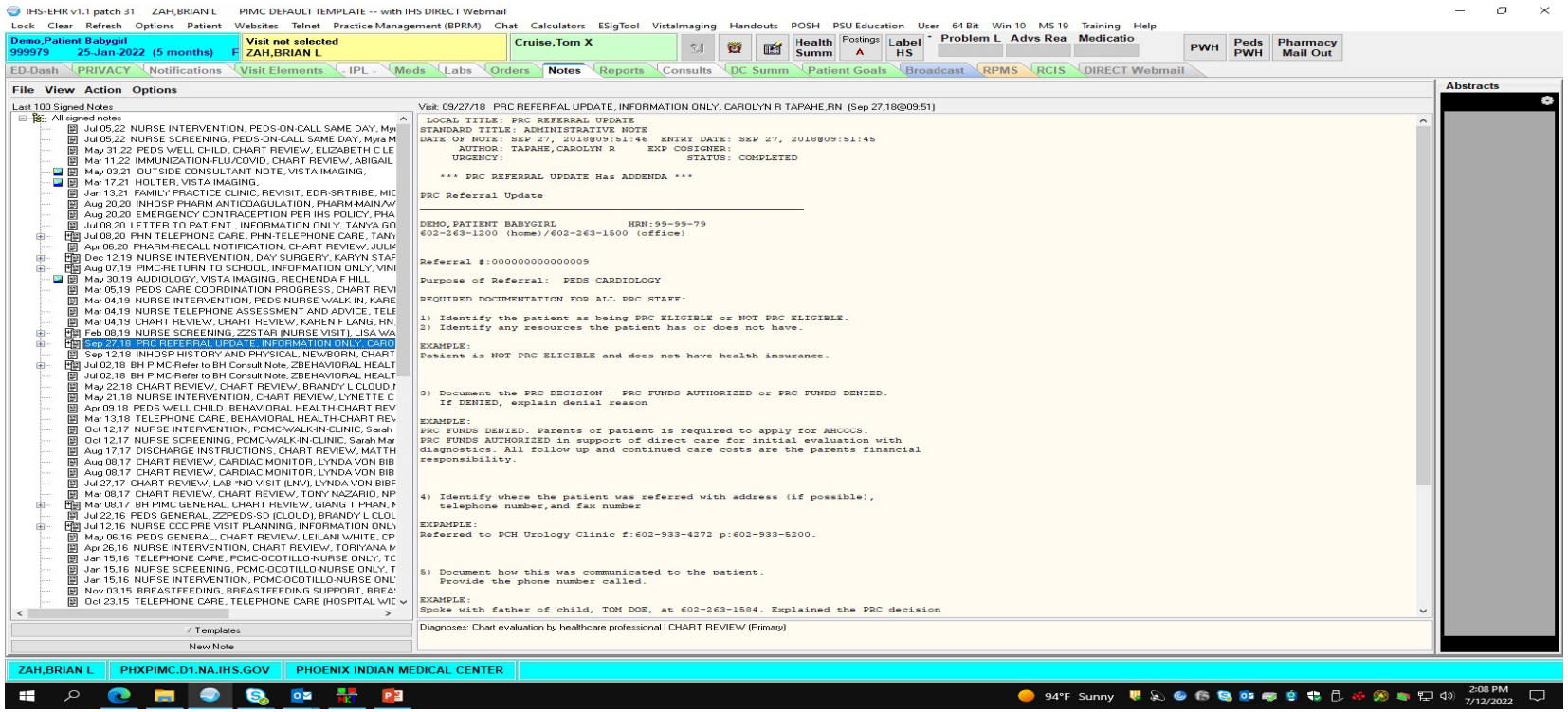
602-263-1569 PRC Phone
602-263 1589 PRC Fax
pimcprc@ihs.gov PRC Email

Office hours: 8:00AM-4:30PM

PHOENIX INDIAN MEDICAL CENTER
4212 NORTH 16TH STREET
PHOENIX, AZ 85016

PURCHASED & REFERRED CARE (PRC)

PRC Collaboration with Patient Business



Benefits Coordinator Role

- Plays a very important role between patient and providers/clinicians, finance, PRC & Case Management
- Is the liaison between patient, federal, state, local and tribal agencies
- They are the patients advocate (hospital/clinic/state assistance)
- They are the patients educator/navigator & “go to” person

Benefits Coordinator Role – Hospital vs Small Clinic

Roles may differ on hospital/clinic size

- Hospitals (ED, Admissions, SDS, etc)
  - These are your high cost areas, very important the BC in these assigned areas are starting the application process, submitting the application
  - SDS or any other "planned" stay, must pre-visit plan. Talk to your patients on the importance of applying, do the interview over the phone, check off list of documents to bring to pre-op visit
  - Bit more difficult to create a relationship with patient as you only see them once, maybe twice then they are discharged
  - Must work well with the BC's in the clinic, have a successful hand-off process
  - Work as a team, know what the other hand is doing, able to explain the SAME process, do not deviate. This can be were trust is broken with the patient (lost paperwork, etc)
  - Communicate, have the hard conversations. Issues? Also bring solutions to process improvements
  - If a process works and data proves it, celebrate!

Benefits Coordinator Role – Hospital vs Small Clinic

- Smaller Clinics
  - Planned visits, pre-visit planning can be done, know who is coming in
  - More controlled environment (you start/end process) nobody else involved
  - Easier communication between Pt Reg, clinicians, PRC staff
  - Trust is gained, same person, no handoff
  - You are the only person for process improvement changes, suit to the needs of the patient (fax documents instead of driving in)
  - May also be wearing many hats in a smaller clinic; patient reg, BC and sometimes PRC
  - You are able to adjust process improvement easier without many “higher interventions or blessings” needed/required
  - Able to have buy-in from other departments and break down silos
  - Create a trusting environment of accountability and responsibility

Colorado River Service Unit – PBO/PRC/CCC/CM/OUT PT

- 5 facilities – 5 different processes
- No standardization of documentation for referrals/committee/etc
- Implemented standard documentation on each referral
- Meetings with outpatient providers on referral entry
- PBO/CCC/CM actively participating in PRC committee reviews
- Shared drive folder tracking spreadsheet between PRC, PBO and CCC to follow BC/CCC related matters
- Audit on documentation shared with Leadership and Tribe
  - Significant decrease in complaints about referrals (internal/external)


IT'S SURVEY TIME


WE WANT
YOUR
FEEDBACK!

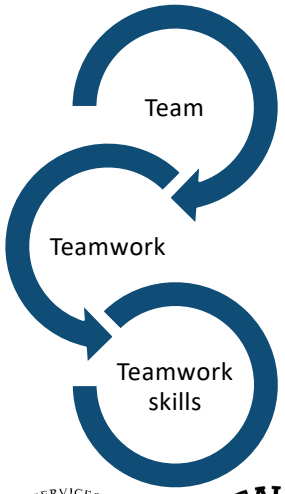
Challenges that Effect Continued Collaboration

Managing the revenue cycle
- Being pulled to other aspects
- Vacancies creating extra work

Evolving clinics all over campus
- Telemed visits
- Access to Care
- New added services that didn't include business office

Compassion Fatigue

Barriers to Team Composition
- Inconsistency in team membership
- Lack of role clarity
- Defensiveness
- Conventional thinking
- Conflict
- Complacency
- Varying communication styles



How Do We Start the Conversation?

- You have put some work into analyzing and how to implement a new process, as you introduce new improvements. As you introduce, explain **why** the change is necessary, what goals you hope to achieve with the improvements and the benefits the new improvements will have for patients and staff
- Change is inevitable and often necessary, which does not translate to easy…especially for employees
- When we need to update, rework or improve process, you may face pushback, frustration and even confusion from your staff
- Clear communication is key for a smooth transition for new improvements. As you explain the process change that significantly impacts employees day-to-day workflows, employees are more likely to understand and "buy-in" the need for the change and get behind it. Explain the **value** it will bring to your clinic/hospital and overall goal. This extra content can make the difference in bridging the gap for implementation.

How Do We Implement?

- Analyze – you must understand what is going on and why
- Identify leaders for engagement, support, buy-in and ownership
- Ask for feedback from those who are “boots on the ground”
- Define/model your improvement process
- Identify the necessary staff/resources
- Communicate what is going on to all – very important
- Monitor and optimize – what worked, what needs improvement, what to discard
- Test, test and test until your goal is met

Analyze

- Access your current state: staff, process and resources. What is the need…not want
- Which employees can be your “champion”? What is your staff’s current skills and knowledge? What tools are available to support the improvements?
- Identify the need for the change
  - PRC department was not timely on processing the referrals
  - Led to many complaints
  - No communication about the referral
  - PRC referrals with no decision after 5 days
  - Denial information was not entered in the denial package
  - Many overdue bills
  - Staffing vs user population
  - Outpatient, PBO, HIM, CM did not know what PRC does/process
  - Lack of education outside of PRC (staff and community)
  - No accountability/responsibility (reports/staff)

Leadership and Key Employees

- Improvements should be sponsored by leadership and mirrored by supervisors
- When improvements are championed and prioritized by top leadership and reinforced by supervisors, on the ground employees are more likely to follow
- On the ground employees are your process champions. They will be the example of what good looks like and how it benefits the clinic/hospital
- Strong support system, training, positive mentorship will help everyone want to be a part of the improvement process
- CRSU Leadership had the same vision of improvement which made the process easier as far as support
  - CEO & DCEO 110% supportive, voiced in monthly staff meetings, emails and one-on-one
  - Routine follow up with CEO & DCEO on process and accountability with all departments of collaboration (PRC/PBO/Outpatient/HIM)
  - Supervisors from other departments were on board and accountable for their staff


WORKER
BEES
ONLY


FEEDBACK
?

Boots on the Ground

- Ask for feedback from those who are doing the work
- Feedback should come from all aspects of the clinic that has any first hand dealing with your department
  - PBO, Outpatient, Providers, CM, HIM
- Do not take feedback personal
- Many staff are patients, ask from a patient point of view as well
- Able to identify bottlenecks and barriers
- We were able to identify:
  - Providers not entering data correctly in the referrals
  - Duplicate referrals entered because previous referral was not noted
  - Lack of education from PRC, delay in scheduling/purchase order issuance
  - Lack of accountability of staff and referrals

Define/Model Your Improvement Process

- Now that you understand the process from start to finish, model what good looks like
- Use simple writing and clearly communicate the nature of the process
- Emphasize the importance and benefits of the improvement
- Use visuals such as process maps and flow charts to introduce the improvement, clarify each departments roles and accountability within the workflow
- Flow charts were shared with all departments that effected PRC
  - Showed how an incomplete referrals impacts scheduling
  - Not adding what documents need to accompany referral will delay appointment
  - Incorrect phone number/address will delay communication
  - Notes from vendors not uploaded for provider review cause delay in care
  - How far behind PRC was with processing referrals

Identify the Necessary Staff/Resources

- Once you identify your process, you may need to address “gaps” in skillsets, knowledge and staffing
- Various ways to train your workforce:
  - Mentor
  - Peer to peer program
  - Develop presentations and workshops
- Staffing – reports and workflow show need more FTE’s, start your SBAR’s
- We identified:
  - needed additional training for “new” staff
  - Workload (backlog) outweighed current staff – COVID hire

Communicate What is Going on…to ALL

- Document your process (PDSA) and sharing is very important
- SHARE! Share your process with ALL. The good, the bad, the ugly
- We shared:
  - Reports with staff, HSA, leadership and tribe
  - Show your progress, big and small
  - Reports to staff on their individual process
  - Ask for feedback

Monitor and Optimize

- PDSA, only way to improve and move forward
- Process will change, and change, and change
  - Isn't easy, but worth it
  - Will be able to successfully train and onboard employees to new process
- Keep your staff in the loop, continuous change could be frustrating if you are not communicating.
  - They will feel part of the solution – more likely to buy-in and actively participate
  - If not, staff can feel defeated and lead to lower morale and decreased productivity
- We were able to move the needle to show faster turn around
  - Staff vocalized barriers and they came up solutions
  - Providers became more aware of their documentation
  - Communication with patients were documented, almost minimized complaints

Test, Test and Test

- We will fail….
- When we introduce a new process, there will be a learning curve, you must acknowledge it
  - Reassure your team mistakes are expected
  - We must take responsibility and accountability for our work
- We need to make if safe for our staff to fail. Give them time to accept, train, practice and not make the mistake again
- When staff feel safe to admit, be accountable and responsible for their mistake, they will feel secure enough to try new things and less threatened by change
- It will take time…
  - Staff was very upset on the workload and said it was too much
  - Time management was introduced
  - Took many items they were doing for other departments off them
  - Showed staff their improvements and celebrated
  - Staff take more pride in their work
  - Trust that has been rebuilt with the community and complaints has ceased

Questions?


INDIAN HEALTH SERVICE
PHS · 1955 ·