CUSTOMER SERVICE TO PATIENT EXPERIENCE: THE CULTURAL SHIFT

CATHERINE PALLOZZI, CHAM, CCS
DIRECTOR, PATIENT ACCESS
ALBANY MEDICAL CENTER
LEARNING OBJECTIVES FOR TODAY’S PRESENTATION

1. Understand how to get staff buy-in to creating the optimal patient experience

2. Identify ways to change their culture from customer service oriented to patient experience focused

3. Integrate new tools to assist in the development of a patient experience program for patient access staff.
A little about our facility and department....

734 bed – Level I tertiary care and teaching facility including an outpatient surgery center off site
40,300 admissions including 11, 600 external transfers
76,000 emergency department visits
470 faculty physicians
25 County Service area

*Engagement with Studer Group beginning 2014

Patient Access
130 Staff including management

Scope of services:
- Financial Clearance Operations: Pre-Admission Registration; Insurance Verification and Patient Assistance Unit
- Registration: Inpatient, Outpatient **– Radiology, Non-patient Laboratory, Cardiac Catheterization, Surgical Check-in, Birthplace, Apheresis, Pre-Admission Services **with reporting decentralization of other outpatient services
- Access Center
- Emergency Department Clerical Team (all clerical staff registration and health unit coordinator functions)
- Quality and Development Team -
YOU
NEVER
GET A SECOND
CHANCE
TO MAKE A
GREAT
FIRST
IMPRESSION

NAHAM
2007 and 2008 Patient Access Week Theme!
Customer Service 101...

Customer Service 101/Cultural Competence

Learning Objectives

You will learn (Class Objectives):

• Customer Identification
• Albany Medical Center’s Customer Service Standards
• What our patients and customers want and expect
• How we affect the customer
• How to be flexible
• How to greet customers
Cultural Shift =
Change of Behavior and Change of Result
Patient Experience: Why Is Employee Engagement Important?

Majority of U.S. Employees Not Engaged Despite Gains in 2014

Amy Adkins

- 31.5% of U.S. employees engaged in 2014
- Engagement at its highest since 2000
- Younger workers are least engaged

Gallup Poll

Washington, D.C. – Less than one-third (31.5%) of U.S. workers were engaged in their jobs in 2014. The average is up nearly two percentage points from 29.6% in 2013 and represents the highest reading since 2000, when Gallup first began tracking the engagement levels of the U.S. working population. However, a majority of employees, 51%, were still "not engaged" and 17.5% were "actively disengaged" in 2014.
Impact of Employee Disengagement on the Patient Experience

THE PROVEN CONNECTIONS BETWEEN EMPLOYEE ENGAGEMENT AND PATIENT SATISFACTION

An HR Solutions case study using nearly 29,000 healthcare employee opinion surveys revealed compelling evidence that employee engagement has a direct tie to patient satisfaction. In the survey, it was determined that:

85 percent of engaged employees displayed a genuinely caring attitude toward patients, compared to only 38 percent of disengaged employees.

91 percent of engaged employees recognize their workplace as dedicated to patient care, compared to only 42 percent of disengaged employees.

82 percent of engaged employees would want to use the facility where they work as a healthcare provider, compared to only 22 percent of disengaged employees.
- Rounding – What is it?
  a. What is working well –
  b. Staff we should recognize –
  c. System or Process needing attention –
  d. Tools and equipment needs

- STOPLIGHT REPORT

- ALBANY MEDICAL CENTER – STUDER PARTNERSHIP

- AIDET
  - Acknowledges the customer: Smiles, makes eye contact and greets them in a pleasant manner.
  - Introduce self: States name, role at UTMB, highlights skills and expertise of self and other healthcare team members.
  - Duration: Gives the customer a time expectation: Keeps customer informed as to the amount of time a procedure or process will take. Includes letting them know if there is a wait time; gives time expectation of that wait.
  - Explanation: Keeps customers informed by explaining all processes and procedures. Assists customers to have clear expectations of what will be occurring.
  - Thanks the customer: Consistently thanks customers for their time; and, if a patient, for choosing UTMB; expresses appreciation that they have chosen UTMB Health as their healthcare facility. asks if there is anything else he/she can do for the customer before ending the interaction.

- UTMB Health: Working together in such moments.
KNOW YOUR WORKFORCE!

U.S. Employee Engagement, by Generation

<table>
<thead>
<tr>
<th>% Employees engaged</th>
<th>2013</th>
<th>2014</th>
</tr>
</thead>
<tbody>
<tr>
<td>Millennials</td>
<td>27.5</td>
<td>28.9</td>
</tr>
<tr>
<td>Generation X</td>
<td>29.6</td>
<td>32.2</td>
</tr>
<tr>
<td>Baby boomers</td>
<td>30.9</td>
<td>32.7</td>
</tr>
<tr>
<td>Traditionalists</td>
<td>38.3</td>
<td>42.2</td>
</tr>
</tbody>
</table>

GALLUP

**Managers: Millennials Want Feedback, but Won't Ask for It**
Millennials desire routine feedback from their supervisors, but they neither request nor receive it.

Only 19% of Millennials said they receive routine feedback.

In years of age:

- 1922-1945: Veterans, Silent, Traditionalists
- 1946-1964: Baby Boomers

16 – 35 expected to be 50% of workforce by 2020
PATIENT ACCESS - CREATING THE OPTIMAL PATIENT EXPERIENCE

According to Gallup, what all customers -- and patients -- want is the fulfillment of four psychological elements:

**Confidence** reflects the belief that patients can always trust the hospital to deliver on its promises.

**Integrity** reflects the belief that the hospital always treats patients fairly and will satisfactorily resolve any problems that might occur.

**Pride** reflects the degree to which a patient feels good about using the hospital and about how using the hospital reflects on them.

**Passion** reflects the belief that the hospital is irreplaceable and an integral part of patients’ lives.
THE OPTIMAL PATIENT EXPERIENCE...

OUR PROGRAM

Agenda

What is Customer Service? Why is it Important?
AMC Mission, Vision, and Code of Conduct
Healthcare customer service vs Other types of customer service
Who are our/your customers?
Dealing with difficult customers

Etiquette:
- Greetings
- Workspace
- Diversity
- Appearance/professional image
- Language and Communication
- AIDET

Foundation for Superior Customer Service and Creating the Optimal Patient Experience

VIDEO – Empathy: The Human Connection to Patient Care (Cleveland Clinic)

Patient Access
- Culture of “Always”
- Hardwiring

Measuring our Success

Commitment to the Patient Experience
<table>
<thead>
<tr>
<th>Time</th>
<th>Session</th>
</tr>
</thead>
<tbody>
<tr>
<td>0830-1000</td>
<td>Outlook OWA</td>
</tr>
<tr>
<td>1245-1400</td>
<td>Outlook Client</td>
</tr>
<tr>
<td>0830-1700</td>
<td>Soarian Financials Introduction and Navigation</td>
</tr>
<tr>
<td>0830-1700</td>
<td>Encounter Management (EM) 1</td>
</tr>
<tr>
<td>0830-1700</td>
<td>EM 2</td>
</tr>
<tr>
<td>0830-1700</td>
<td>EM 3</td>
</tr>
<tr>
<td>0830-1700</td>
<td>EM 4</td>
</tr>
<tr>
<td>0830-1700</td>
<td>MSP</td>
</tr>
<tr>
<td>0830-1700</td>
<td>Insurance Management (IM)</td>
</tr>
<tr>
<td>0830-1700</td>
<td>IM/Payer 2</td>
</tr>
<tr>
<td>0830-1530</td>
<td>Unit specific &amp; assessment</td>
</tr>
<tr>
<td>0830-1630</td>
<td>Unit specific &amp; assessment</td>
</tr>
<tr>
<td>0830-1200</td>
<td>Unit specific</td>
</tr>
<tr>
<td>1300-1530</td>
<td>Unit specific</td>
</tr>
<tr>
<td>0830-1500</td>
<td>Unit specific &amp; assessment</td>
</tr>
<tr>
<td>0830-1630</td>
<td>Unit specific &amp; assessment</td>
</tr>
<tr>
<td>0830-1030</td>
<td>Unit specific</td>
</tr>
<tr>
<td>1330-1500</td>
<td>Unit specific</td>
</tr>
<tr>
<td>1330-1630</td>
<td>Unit assessment</td>
</tr>
<tr>
<td>0830-1230</td>
<td>Unit specific</td>
</tr>
<tr>
<td>0830-1230</td>
<td>Unit specific</td>
</tr>
<tr>
<td>1300-1630</td>
<td>Unit specific</td>
</tr>
<tr>
<td>1300-1500</td>
<td>Unit assessment</td>
</tr>
<tr>
<td>0830-1230</td>
<td>Unit specific &amp; assessment</td>
</tr>
<tr>
<td>0830-1130</td>
<td>Unit assessment</td>
</tr>
<tr>
<td>1300-1600</td>
<td>Unit practice</td>
</tr>
<tr>
<td>0830-</td>
<td>Review and Comprehensive Assessment</td>
</tr>
<tr>
<td>0830-1700</td>
<td>HDX</td>
</tr>
<tr>
<td>0830-0945</td>
<td>EDM Scan Only</td>
</tr>
<tr>
<td>0830-1200</td>
<td>Consent</td>
</tr>
<tr>
<td>1245-1445</td>
<td>Registration Guide</td>
</tr>
<tr>
<td>1500-1615</td>
<td>Enterprise Visibility</td>
</tr>
<tr>
<td>0830-0850</td>
<td>Consent Assessment Review</td>
</tr>
<tr>
<td>0900-1230</td>
<td>EDM PA Users</td>
</tr>
<tr>
<td>1310-1425</td>
<td>Point of Service (POS) Collections</td>
</tr>
<tr>
<td>1430-1630</td>
<td>Web Eligibility</td>
</tr>
<tr>
<td>0830-0945</td>
<td>Intranet</td>
</tr>
<tr>
<td>1000-1200</td>
<td>HIPAA and Red Flag</td>
</tr>
<tr>
<td>1300-1500</td>
<td>Medical Necessity</td>
</tr>
<tr>
<td>1400-1600</td>
<td>The Patient Experience</td>
</tr>
<tr>
<td>1230-1730</td>
<td>Comprehensive Insurance</td>
</tr>
</tbody>
</table>
Hospital Consumer Assessment of Healthcare Providers and Systems (HCAHPS)

- What is the HCAHPS survey?
  - Survey mailed to a random selection of patients
  - Questions on the survey are based on a patient’s recent visit to AMC and involve questions on their entire experience
  - Most answers on the survey involve answers of: Never, Sometimes, Usually, Always

1. Were clerks or receptionists at this facility as helpful as you thought they should be?
2. Did clerks or receptionists at this facility treat you with courtesy and respect?
3. Did clerks and receptionists at this facility treat you with courtesy and respect?
4. Was the pre-registration/admitting process as organized as you thought it should be?
5. Was the registration process completed timely and respectfully?
6. Prior to your scheduled services, were you made aware of your financial responsibility at the time of services?
7. If you did not have insurance or if you were under insured, did an Enrollment Specialist contact you either face to face or by telephone to discuss financial assistance options?
NAHAM: PATIENT EXPERIENCE TOOLKIT!

I. Patient Needs Information/Customer Service Policies/ Communication Tools
1. Patient expectations
2. Glossary of terms in common language
3. Managing Patient and Family Complaints
4. Emotional Intelligence, respect
5. Service Delivery and Recovery
6. Adoption Process
7. Grief and Bereavement Support
8. Information booklets and websites

II. Diversity

III. Hiring and Retaining Quality Candidates to Deliver the Patient Experience
1. Hiring Practice
2. Compensation, Job Enrichment & Career Ladders
3. Staff Turnover
4. Chief Experience Officer Roles
5. Performance Evaluation

IV. Certification
1. The Value of Certification
2. NAHAM Certifications

V. Job Description Library
1. Concierge / Front Desk
2. Registration
3. Scheduling
4. Patient Financial Navigator
5. Patient Experience Positions
6. Emergency Services Rep
7. Denials Specialist
8. Call Center

VI. Patient Focused Competencies & Training
1. Best Practice Recommendations
2. Service
3. Financial Counseling
4. Insurance Verification (coming in a future edition)
5. Collections Skills
6. Negotiation Skills (coming in a future edition)
7. Denial Prevention (coming in a future edition)
8. Scripting
9. Patient Identification
10. Patient Rounding

VII. Metrics (Coming in a future release)
1. Patient Experience Performance Indicators (PX)
2. Goals
3. Reports

VIII. Surveys
1. Pay for performance component (HCAHPS, CGCAHPS, etc)
2. Real time daily surveys

IX. Technology

X. Patient Engagement

XI. Case Studies (Coming in a Future Release)

XII. Lifetime Value of a Patient

XIII. Educational Options
1. Webinars
2. NAHAM Journal articles
3. Additional publications
4. Other Resources and Organizations

MEMBER ONLY BENEFIT COMING SOON!
1. Understand how to get staff buy-in to creating the optimal patient experience

2. Identify ways to change their culture from customer service oriented to patient experience focused.

3. Integrate new tools to assist in the development of a patient experience program for patient access staff.
They may forget your name, but they will never forget how you made them feel.

- Maya Angelou

Questions?

pallozc@mail.amc.edu