



# NAVIGATING

Revenue Cycle Change Using Technology & Automation



**BEFORE**

The Bridge of Choluteca,  
Honduras





AFTER

**The bridge survived...  
*But the river moved!***



## THE TRADITIONAL APPROACH



Engaging all patients the same way  
 no longer generates results



STATIC COMMUNICATION  
 SERIES



INTERNAL FOLLOW-UP  
 EFFORTS

**AND / OR**



OUTSOURCED FOLLOW-UP  
 EFFORTS



SLOW REACTIVE  
 ADJUSTMENTS



AND AT THE SAME TIME ARE EXPECTED TO

**IMPROVE COLLECTIONS  
&  
PATIENT EXPERIENCE**

WITH LIMITED BUDGET AND RESOURCES





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PATIENTS RESPOND WITH MORE TOUCHPOINTS

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# ACTIVE

## PATIENT ENGAGEMENT





# WHAT IS IT?

Active Patient Engagement is an approach to engaging patients within the revenue cycle that focuses on:

Developing and implementing targeted engagement workflows to drive the optimal financial outcome and patient experience.



the right  
**MESSAGE**



at the right  
**TIME**



to the right  
**PATIENT**



via the right  
**MEDIUM**



to drive the right  
**RESPONSE**





# ACTIVE PATIENT ENGAGEMENT

## RECAP

1

### Information does not lead to action

We can no longer expect patients to take action by simply providing information. We must change our approach and how we engage them.

**Stop believing that  
information leads  
to action.**

**We humans aren't  
so rational.**

B. J. Fogg  
Computer Scientist



# ACTIVE PATIENT ENGAGEMENT

RECAP

2

## Developing Patient Scenarios

Leverage data and experience to create common patient scenarios you and your team encounter at each RCM touchpoint.



**Build the path to the optimal outcome.**

**Guide and help patients through that path with your engagement strategy.**



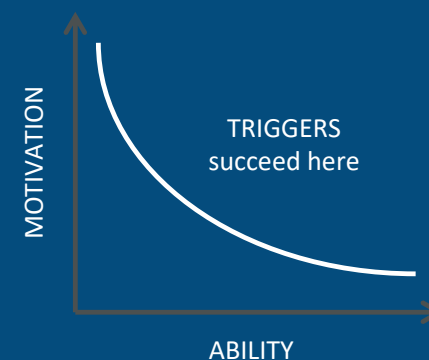
# ACTIVE PATIENT ENGAGEMENT

## RECAP

3

### Increasing Ability, Motivation and Triggers

Driving the optimal patient action requires increasing the patient's ability or desire to take action, and then using triggers to accelerate action.



**No behavior happens without a trigger.**



# ACTIVE PATIENT ENGAGEMENT

## RECAP

4

### Measure, test, track and repeat

Active Patient Engagement is about making small, continual improvements to drive the optimal outcome and patient experience, not large wholesale changes.



**Establish a baseline.  
Let the data and best practices  
refine your strategy.**





# ACTION STEPS

TECHNOLOGIES & TRENDS





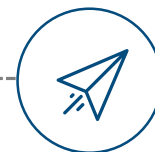
**Pre-Service**



**Point-of-Service**



**Post-Service**



**Follow-Up**

**PRIMARY OBJECTIVES**

**Revenue Assurance**

**Warm to Financial Obligation**

**Facilitate Payment**

**Gauge Satisfaction**

**SECONDARY OBJECTIVES**

Differentiating Patient Experience

Patient Self-Service

Operational Integrity and Efficiency



# FRONT END

STRATEGY



Pre-Service



Point-of-Service







# OPTIMAL OUTCOME



Revenue assurance



Patient understands financial obligation



**Patient set on the optimal path to financial resolution**

Depending on available data, workflow has been established for fastest, most efficient account resolution for the given situation.



Pre-Service



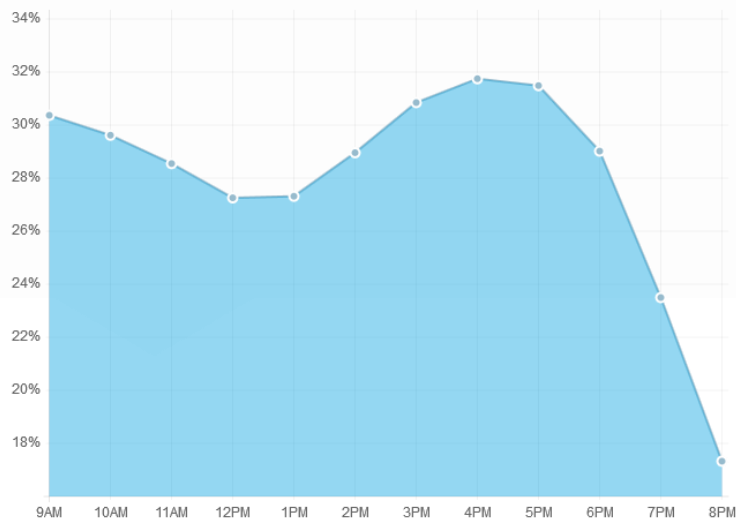
Point-of-Service





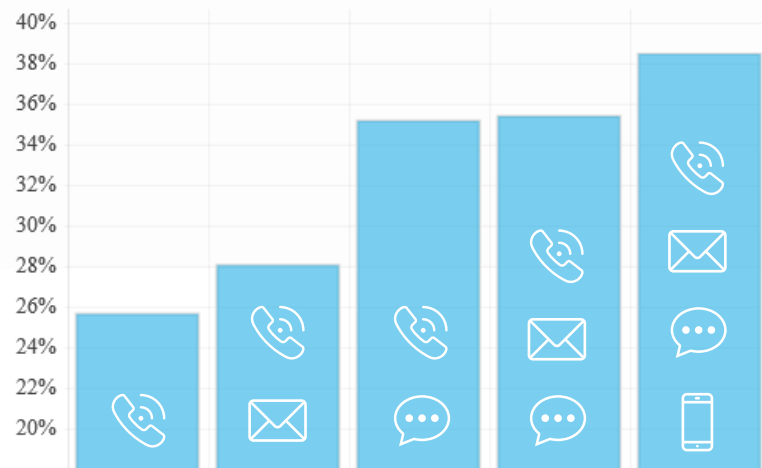
# INCREASING ABILITY

Understanding response trends allows for better utilization of both engagement technology and staff resources.



## OPTIMIZING TIMING

Patients most responsive at 9am and between 3pm-5pm.



## CHANNEL FLEXIBILITY & PREFERENCE

Increasing modes of communication and communicating by patient preference directly impacts response rates.





# Increasing Motivation

Tactics worth testing:



## Tell them why

Studies show we are more likely to comply with a request when given a reason. When transitioning into your reason, use the word "because."



## Use patient's first name

An experiment in a British physician office showed that SMS text message appointment reminders that used a patient's first name, reduced no-shows by 57% over a control group that used no first name.



## Get a commitment

Use the influential power of "consistency" to influence patient behavior and response by getting patients to make a commitment during pre-service touchpoints.



## Use future pace

Get patients to think positively about the future benefit of completing the requested action. Usually deployed by the trigger word "when."



**"Warming" patients to their financial obligations requires a holistic strategy - beyond just tools and technology.**





# BACK END

STRATEGY



Post-Service



Follow-Up





**Payment acceleration**



**Maximize collection efficiency**



**Ensure differentiating patient experience**

Deliver a personalized service experience.

# OPTIMAL OUTCOME



**Post-Service**



**Follow-Up**



## 3 KEY AREAS



### ENGAGEMENT

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Build patient engagement workflows to influence the optimal financial outcome for each segment.



### RESPONSE

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Are self-service payment applications user friendly?

Mobile responsive?

Simple user interface?



### OPTIMIZATION

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Start with a baseline, and then track performance of specific engagement workflows and messaging enhancements against a control group.

# ENGAGEMENT

Determine the optimal financial outcome

**Optimal (and most realistic)  
resolution path for each  
patient segment?**

**Payment in Full?**

**Payment Plan?**

**Financial  
Assistance?**

**Optimal payment channel?**

**IVR?**

**Online?**

**Mail / CSR?**





























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I SCORE, BUT IT'S REALLY NOT USEFUL FOR ANYTHING

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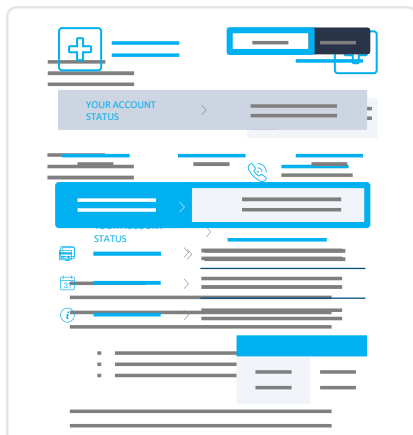
Segmenting accounts to tailor more effective engagement workflows.

HIGH	MEDIUM	LOW	CHARITY
	 	 	
	 	 	
	 	 	
	 	 	



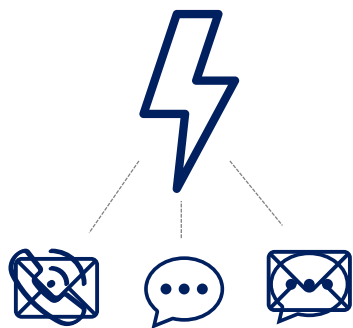
Segmenting accounts to tailor more effective engagement workflows.

HIGH	MEDIUM	LOW	CHARITY
<div>More than \$25</div>  	<div>More than \$500</div>  	<div>More than \$25</div>  	 
 	<div>\$25 - \$500</div>  	 	 
 	 	 	 
LESS THAN \$25			

































Tailoring design and messaging to drive the **optimal outcome** for each segment.

HIGH	MEDIUM	LOW	CHARITY
More than \$25	More than \$500	More than \$25	
	\$25 - \$500		
LESS THAN \$25			



Adding segment-specific follow-up to **accelerate patient response.**

HIGH	MEDIUM	LOW	CHARITY
More than \$25	More than \$500	More than \$25	
 	 	 	 
 	\$25 - \$500	 	 
  	   	  	 
LESS THAN \$25			
 			



# USE CASES

**Leveraging Active Patient Engagement to tailor communication design changes,  
tailor outbound IVR messaging and align with 501(r) compliance.**



# PARKVIEW HEALTH

USE CASE







**PROMPT PAY DISCOUNT**  
(if paid by 10/29/15)  
**\$899.43**

**PAYMENT DUE**  
**\$971.00**

## Your Account Status

We have billed your insurance and the remaining balance is your responsibility

Insured/Policyholder: Juan Sample, 000000000, 10/01/15, 10/29/15

### YOUR NEXT STEP

Take advantage of prompt pay discount by making payment in full before the prompt pay due date.

- MAKE PAYMENT IN FULL**
  - Pay Online by visiting [www.parkview.com](http://www.parkview.com)
  - Pay by Phone by dialing 260.373.7770 or toll free 855.814.0012
  - Pay by Mail by addressing your payment to: PO Box 10416, Des Moines, IA 50306
- SET-UP A PAYMENT PLAN**

Please call 260.373.7770 or toll free 855.814.0012 to arrange a payment plan agreement to fulfill your outstanding balance.
- FINANCIAL ASSISTANCE**

Parkview Health offers financial assistance to patients whose family income meets eligibility requirements. For more information regarding assistance or to obtain a copy of the Financial Assistance Policy or Financial Assistance Application visit [Parkview.com](http://Parkview.com) or call 260.373.7770 or toll free 855.814.0012.

If you have questions about your bill, please call 260.373.7770 or toll free 855.814.0012  
Mon - Fri 8:00am - 5:30pm

**ACCOUNT SUMMARY**

BALANCE FORWARD	\$0.00
PAYMENTS SINCE LAST STATEMENT	\$0.00
CURRENT CHARGES	\$971.00
AMOUNT DUE W/ PROMPT PAY DISCOUNT	\$899.43
AMOUNT DUE BY 10/29/15	\$971.00

please turn over for important information

**DAY 1**



Not Pay After Insurance High Property Level 2

**PAYMENT DUE**  
**\$668.52**

## Your Account Status

We have billed your insurance and the remaining balance is your responsibility, one or more of your accounts are now past due

Juan Sample, 000000000, 11/01/15, 11/29/15

### YOUR NEXT STEP

To resolve your past due account, make payment in full or call to set up a payment plan.

- MAKE PAYMENT IN FULL**
  - Pay by Phone by dialing 260.373.7770 or toll free 855.814.0012
  - Pay by Mail by addressing your payment to: PO Box 10416, Des Moines, IA 50306
- SET-UP A PAYMENT PLAN**

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### General Questions

If you have questions about your bill, please call 260.373.7770 or toll free 855.814.0012  
Mon - Fri 8:00am - 5:30pm

**ACCOUNT SUMMARY**

BALANCE FORWARD	\$899.43
PAYMENTS SINCE LAST STATEMENT	\$230.91
CURRENT CHARGES	\$0.00
AMOUNT DUE BY 11/29/15	\$668.52

please turn over for important information

**DAY 30**



Not Pay After Insurance High Property Level 3

**PAYMENT DUE**  
**\$645.52**

## Your Account Status

One or more of your accounts is now in Final Notice stage, to avoid collection activity please see your next step below

Juan Sample, 000000000, 12/01/15, 12/29/15

### YOUR NEXT STEP

Your account may be placed with a collection agency and reported on your credit report if you do not take action immediately with one of the payment options below

- MAKE PAYMENT IN FULL**
  - Pay by Phone by dialing 260.373.7770 or toll free 855.814.0012
  - Pay by Mail by addressing your payment to: PO Box 10416, Des Moines, IA 50306
- SET-UP A PAYMENT PLAN**

Please call 260.373.7770 or toll free 855.814.0012 to arrange a payment plan agreement to fulfill your outstanding balance.
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### General Questions

If you have questions about your bill, please call 260.373.7770 or toll free 855.814.0012  
Mon - Fri 8:00am - 5:30pm

**ACCOUNT SUMMARY**

BALANCE FORWARD	\$645.52
PAYMENTS SINCE LAST STATEMENT	\$0.00
CURRENT CHARGES	\$0.00
AMOUNT DUE BY 12/29/15	\$645.52

please turn over for important information

**DAY 60**



**Increasing urgency**

Communication content and design adapt to increase urgency and drive patient action as the account ages.



# CHARLESTON AREA MEDICAL CENTER


USE CASE



Charleston Area Medical Center  
PO Box 1547  
Charleston, WV 25326



STATEMENT DATE	09/24/2015
PATIENT NAME	John Snow
ACCOUNT #	ABC0345
DOS	08/10/15 - 08/20/15

 **QUESTIONS OR NEED MORE INFO?**  
Call 304.388.6496 or 304.388.6406

John Snow  
123 Any Street  
Anytown, WV 12345

## YOUR ACCOUNT STATUS At this time, you do not pre-qualify for financial assistance

Dear John Snow,

Charleston Area Medical Center, Inc. offers financial assistance to their patients. At this time you do not pre-qualify under our financial assistance policy. This determination was made based on information we accessed through public record databases that were used to estimate your likely qualification under this policy.

Financial assistance forms are available:

- On our website at [www.camc.org](http://www.camc.org)
- 501 Morris Street Charleston, WV 25301
- At each registration area
- Financial Counselors are available at each division to assist in the application process
- By calling the Financial Assistance Unit

If you have any questions or need additional information please call the Financial Assistance Unit at (304) 388-6496 or (304) 388-6406 or contact customer service at (304) 388-7530.

Thank you,  
Charleston Area Medical Center, Inc.'s Financial Assistance Unit

## FOR MORE INFORMATION



Call the Financial Assistance Unit at (304) 388-6496 or (304) 388-6406

102040

NOT QUALIFIED

PRE - QUALIFIED

50 % QUALIFIED



Getting in alignment with 501(r) compliance





**YOU ARE  
ALREADY INFLUENCING  
A RESPONSE...**





THANK YOU!



Follow us on LinkedIn: RevSpringInc

VISIT US AT [WWW.REVSPRINGINC.COM](http://WWW.REVSPRINGINC.COM)

