

# Pre-service excellence in an Epic environment

Yale New Haven Health elevates the patient financial experience for consumers and staff

## Challenge

To match its award-winning academic medical center reputation, Yale New Haven Health (YNHH) was challenged to build a world-class financial pre-service center to encompass its patient access, authorizations and price estimate processes. The mission was twofold: to elevate the patient financial experience, by compassionately educating patients about the finances surrounding their care, and educating staff on the tools and methods for delivering that message.

Faced with inefficient eligibility capabilities, limited ability to disclose patient financial obligations beyond simple co-payment requirements, and difficulties generating accurate estimates for procedures, YNHH needed strong technologies, tools, processes and training to achieve its pre-service excellence goals of:

- Elevating the pre-service financial experience for their patients;
- Empowering their nearly 1,500 employees with consistent and efficient practices; and
- Ensuring successful patient navigation and upfront education of financial responsibilities.

In today's consumer driven healthcare landscape—and with more and more high deductible plans—patients have become shoppers and are expecting to know 'how much will this procedure cost me?' According to Sharlene Seidman, Executive Director Corporate Business Services with Yale New Haven Health, "We needed a consumer-focused price transparency strategy that would bring us on par with other industries, like retail."

"Our patients are so grateful that we are taking the time to find the information to educate them on what they will owe."

—Peggy Beley, Director Pre-service, YNHH

YNHH embarked on a two-year patient financial advisory initiative, including patient and family advisors, to hear opinions and learn valuable information directly from consumers. "Our goal was that when patients discuss their overall YNHH experience, it is not just reflective of their clinical care, but their financial care as well," Seidman added.

Self-service portals, patient billing statements (wording, design and delivery) and generational expectations for payment plan options were among the major topics of the focus groups. To act on these recommendations, YNHH needed a partner to support its pre-service game plan that would not only drive improving the patient experience but would also enhance YNHH staff satisfaction as well.

"The YNHH staff member I spoke to was so nice & fully knowledgeable, updating my info, reviewing my benefits remaining and telling me what to expect as an out-of-pocket estimate. She was lovely."

—YNHH patient

## Solution

YNHH had a previous affiliation with Experian Health for back-end revenue cycle operations including **Payer Alerts** and **Collections Optimization Manager**. Knowing Experian Health's strengths in the Epic EMR space, YNHH was ready to further investigate additional offerings and take advantage of the integration expertise.

“With price transparency in healthcare today, people are now expecting to understand ‘how much will it cost me?’ and Experian Health has helped us get there!”

—**Peggy Beley**, Director Pre-service, YNHH

YNHH engaged Experian Health to provide the following solutions:

**Real-Time Eligibility (RTE)** – Enables YNHH to give its patients their whole financial picture, educating them completely on their benefits and providing insight for payments due. Integrated with Epic's Estimator tool, Experian Health provides YNHH the ability to collect more information accurately upfront. Experian Health's RTE capabilities include:

- Eligibility clearinghouse that leverages connectivity to over 900 payers, including data capture from payer websites, hosted payers, back-up payers and Patented Connection Optimization
- Data normalization process modifies payer eligibility responses to consistently represent patient information to registrars, regardless of payer
- Enrichment of the responses with information from many different data sources, including the payer's websites, other data sources, including CAQH COB Smart™ enhanced Coordination of Benefits data
- Identification of bad plan codes that may have been attached to the patient's insurance; Experian Health detects, repairs and cleans the payer responses to minimize data issues before posting back into Epic

YNHH RTE Results: YNHH knows exactly what procedure the patient is having and are able to communicate to the patient their deductible co-insurance and maximum out of pocket expenses.

“The implementation process went so smoothly we didn't miss a beat in eligibility”

—**Melisa Brereton-Esposito**, Director Systems Training and Staff Development, YNHH

**Coverage Discovery**® – Coverage Discovery supports YNHH's mission to fully educate its patients on their financial obligations. The tool has made a huge impact finding coverage patients didn't know they had, preventing financial hardships and ultimately providing patients peace of mind. As a companion to RTE, YNHH is using Experian Health's Coverage Discovery at registration to eliminate costly patient self-pay situations, write offs and unwarranted charity designations. Coverage Discovery finds billable Medicare, Medicaid and commercial insurances that were previously overlooked by external vendors or internal staff. The YNHH pre-service team is seeking to better understand trends found at registration regarding in missing coverage and so that potential issues can be addressed earlier in the process and patients can be educated accordingly.

**Patient Engagement** – Experian Health is providing YNHH with a patient-friendly, **Patient Self-Service** portal that engages and empowers its patients to actively participate in monitoring their care. A vital component of the YNHH self-service portal is Experian Health's **PaymentSafe**® product which enables YNHH to collect patient payments prior to or at the time of service. Additionally, Experian Health is providing **Patient Statements**, which combines hospital and physician billing into a single document and that allows YNHH to add customized messages to patients.

“Our new patient friendly statement and patient portal has really helped to improve patient interactions with our business office. Patients appreciate having the option to connect with us online and send inquiries through the secure portal instead of only calling into our Call Center and we have received positive feedback on the improved transparency of our patient statement.”

—**Kimberly Mule**, Director System Business Office, YNHH

## Yale New Haven Health

### YNHH Portal Results

- Patients now have the ability to set up their own payment plans online within guided parameters; which greatly saves YNHH time in not having to take patient calls
- YNHH's Patient Portal has over 5,000 registrants who have opted-in to patient paperless statements
- YNHH is driving adoption of the tools by designing mobile solutions to engage millennials in the patient financial experience in an easy and familiar way
- YNHH is utilizing PaymentSafe and most of the features it offers across the five hospitals (Bridgeport, Greenwich, Yale New Haven, Lawrence+Memorial and Westerly)
- All payments—eCheck, signature debit, credit, recurring billing, cash, check and money orders are available, settled automatically and remitted electronically

“The Experian Health team has been an excellent partner with us on this – if we saw something that needed developed, they were willing to understand what was needed to be further enhanced and then worked hard to make it happen for us. That’s a sign of a really good partnership.”

—**Sharlene Seidman**, Executive Director  
Corporate Business Services, YNHH

### Conclusion

YNHH has its future vision set on a growing financial concierge/patient financial advocate program to track the progress for each patient, coach them through the payment process and drive positive outcomes to enhance the patient’s financial experience at YNHH. Additional future goals for YNHH include:

- Reducing resource intensive task activities that overburden staff (such as answering phones to address patient billing statements)
- Improving authorizations processes
- Providing additional self-service capabilities
- Training its 1,500 staff members to ‘speak the same language’ and embrace a common patient experience theme/dialogue that becomes the fabric of its culture

“ROI is not just tangible dollars in additional revenue that we are collecting, it is patient satisfaction and improving the financial experience that we are driving toward.”

—**Sharlene Seidman**, Executive Director  
Corporate Business Services, YNHH

Since going live with **Passport Eligibility** and the Epic integration in May 2016, YNHH has made major strides toward meeting its pre-service excellence goals in four key areas 1) the right technology, 2) best practice, 3) patient interaction/engagement, and 4) employee culture and education. Throughout the journey, Experian Health has tied them all together and has been a strong partner in propelling YNHH in their quest to become a world-class financial pre-service center.