A Road Map to Developing a Patient Access Career Ladder Program

Debbie Watson
System Director of Patient Access
SSM Health

Ronald Packnett
Patient Access Career Ladder and Project Consultant
SSM Health
Learning Objectives

• Determining and identifying reasons for action to enhance decision-making and focus efforts

• Creating flexibility to accommodate the needs of both new and existing staff to promote success

• Leveraging key factors to foster program sustainability, such as new hire orientations, practice exam months, and more
Today’s Speakers:

Debbie Watson
System Director for Patient Access Services

Debbie is an accomplished revenue cycle professional with over 30 years of experience in all segments of the revenue cycle.

Debbie is a highly qualified and patient-focused medical registered nurse with diverse healthcare management experience leading teams with full collaboration and integration with clinical operations, scheduling, health information management/coding, patient financial services, and other revenue cycle functions.

She has implemented enterprise-wide strategic operational projects, EHR system implementation, and personnel and financial activities for patient access. She is a polished communicator, adept at spearheading interactions among multiple clients, including physicians, nurses, parents, families, and other customers. She has supported teams in creative programs and initiatives designed to maximize customer service and satisfaction at all levels while reducing registration denials and building a patient access team committed to ensuring a positive patient experience.

Debbie and her team are the recent recipients of the SSM Innovation Award for the creation and implementation of the Patient Access Career Ladder Program across the health system.
Ronald Packnett
Patient Access Career Ladder and Project Consultant

Ronald Barrington Packnett is a growing revenue cycle and healthcare professional.

Graduating from Yale University with his master’s degree, he focused his time there on intersections of business ethics and education. Ronald started with SSM Health in 2015 and has not missed a beat. Coming on board as the Career Ladder Project Manager, he was able to take this fresh idea of a program and expand it to what it is today: a program that has over 350 active users, is expanding to other departments within SSM Health, and was selected as SSM Health’s 2017 Innovative awardee.

Ronald, although new to healthcare, has been instrumental in many of the programs and projects that have sought to carve out growth within the ever-expanding field of patient access.

As a consultant, he has spearheaded multiple career development initiatives, as well as driven SSM Health’s revenue cycle forward through a shift to in-depth analytics that focuses on the data surrounding efficiency and effectiveness.

It is Ron’s desire that patients be cared for from the minute they walk through the doors of any of SSM Health’s numerous facilities, and that starts with the patient access team.
SSM Health: What we are all about

Determining and identifying reasons for action to enhance decision-making and focus efforts

Creating flexibility to accommodate the needs of both new and existing staff to promote success

Leveraging key factors to foster program sustainability

Award-winning innovation and expansion
SSM Health: What we are all about
SSM Health At a Glance

- SSM Health was founded in 1872 and opened its first hospital in 1877
- We currently have over 33,000 employees across four states (Wisconsin, Illinois, Missouri, and Oklahoma)
- We have 1.6 million outpatient visits and 4.3 million completed medical group appointments annually
Determining and identifying reasons for action to enhance decision-making and focus efforts
The Problem:

Accident and TPL requirements
MSP questionnaires
Point of Service Collections & receipting
ER logs, guarantor rules
Pre-registration
Insurance eligibility verification
Contact fatigue
Customer service
Medical necessity checks & ABN’s
Interpreting insurance coverage and benefits
MPI search and selection
Limited procedure/dx coding
Financial counseling/Charity screening
Guarantor and Subscriber rules
Advance Directives
Address verification
Posting procedures & charges
Handling fraud
Coordination of Benefits
Explaining co-pays & deductibles
Physician selection
Pre-certs, Prior authorizations
Medicare and Medicaid rules
EMTALA, HIPAA, Joint Commission, Fair Debt
Pricing procedures
Scheduling
Hospital policies and procedures
Workers Comp requirements
Privacy notices and consent forms
Patient registration is complex.
Reasons for Action

• Our hospital-based registration position has historically been a role that experiences very high turnover and lower employee engagement

• The optional career ladder program rewards and recognizes registration team members who take additional courses and pass exams to achieve certification and reach the next level of the career ladder
  – If a staff member chooses not to participate, they are still included in annual performance evaluations and are eligible for tenure-based pay increases

• We believe this program will enhance and increase the patient experience while improving employee engagement and retention as well as the overall performance of our revenue cycle
Identifying Career Ladder Metrics

**Employee Satisfaction**
With a baseline of 3.8 on a five-point scale, the goal is to increase to at least **4.2**

**Registration Turnover**
The goal is to decrease turnover to less than **16%**

**Career Ladder Participation**
The goal is for **75%** participation, but more than **90%** of registration staff have participated so far

**Patient Satisfaction**
Tracked through Press Ganey surveys, the goal is to increase the mean to at least **92%**
Creating flexibility to accommodate the needs of both new and existing staff to promote success
Project Scope

• Who was included:
  – Patient access services (PAS) registration staff in every region
  – Full-time and part-time employees

• Who was excluded:
  – Pro re nata employees
  – Other patient access departments

Nearly 500 team members throughout the system were included
Job Classifications

- The career ladder allows for two new levels of development and growth
  - A staff member can choose to reach the first level but not pursue the second or to move at their own pace while pursuing the second and third levels

Original Job Classifications

- Senior PAS Representative
- PAS Representative

Laddered Job Classifications

- Senior PAS Specialist
- PAS Specialist
- PAS Representative
### Career Ladder Responsibilities – PAS Representative

<table>
<thead>
<tr>
<th>Responsibilities</th>
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<tbody>
<tr>
<td><strong>Inpatient</strong> registration</td>
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<tr>
<td><strong>Outpatient</strong> registration</td>
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<tr>
<td>Emergency department (ED) registration</td>
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<tr>
<td>Promotes teamwork</td>
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<tr>
<td>Price estimator tool</td>
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</table>
Career Ladder Responsibilities – PAS Specialist

- Review work of others
- Epic SuperUser
- Epic account maintenance
- Interdepartmental committees
- Compile, verify, and distribute reports/statistics and provide support for special projects

- Identifies process improvement opportunities and actively participates in improvement plans
- Promotes a team concept with coworkers by addressing issues in a constructive/proactive manner
Career Ladder Responsibilities – PAS Senior Specialist

- Creates and manages staff schedule
- Train the Trainer
- Facilitates communication between management and staff; leads the way in accomplishing goals and encourages employee morale

- Assumes responsibility for department in supervisor’s/manager’s absence; assists the supervisor in daily operational function of department through policies and procedures
- Is a resource to onsite staff in the absence of supervisor; makes decisions related to PAS policies and procedures on behalf of PAS management in their absence
Advancement to each level has six areas of criteria:

- **Tenure**
  - Six months with SSM to advance to second tier
  - One year to advance to third tier

- **Education**
  - Completion of rigorous education curriculum

- **Standards**
  - Performance at or above quality and productivity standards

- **Exams**
  - Passing scores on exams

- **Critical Thinking**
  - Completion of Read to Lead book summaries and assessment questions

- **Overall Performance**
  - Earn 3.5 out of 4 on annual evaluation (i.e., duties, goal achievement, performance)
Education Curriculum – PAS Representative

- EMTALA
- Registration Skills for Success
- Registration Basics
- Important Message from Medicare Overview
- Insurance Basics
- Medicare as a Secondary Payer
- POS Collections: Skills for Success
- HIPAA
- Self-Pay Collections: Skills for Success
- Critical Data Elements
- Determining Financial and Medical Responsibilities
- Insurance Plan Code Determination
- Red Flag Rules
- POS Patient Liability
Education Curriculum – PAS Specialist

• Third-Party Payer Billing
• A/R Basics
• Coordination of Benefits
• Revenue Cycle Big Picture
• Service Excellence
• Service Authorization Basics
• Billing Basics
• Financial Counseling Basics
• Order Management Basics
• Pre-Registration Basics
• Scheduling Basics
• Appointment Confirmation
Education Curriculum – PAS Senior Specialist

- Understanding the 1500 Claim Form
- Understanding the UB-04
- Maximizing Financial Counseling
- Maximizing COBRA
- Denial Management Basics
- Patient Payment Basics
- ABN Basics
- Understanding and Assessing Patient Financial Status
- Medical Necessity Basics
Salary Increase Opportunities

**Representative**
- Complete 15 HBI courses
- Complete the cumulative exam
- Receive a 5% Increase

**Specialist**
- Complete 11 HBI courses
- Complete the cumulative exam
- Receives a three-job grade promotion to specialist

**Senior Specialist**
- Complete nine HBI courses
- Complete the cumulative exam
- Receives a two-job grade promotion to senior
Leveraging key factors to foster program sustainability, such as new hire orientations, practice exams, and more
We pride ourselves on the career ladder remaining relevant in dynamic environments. We seek to ensure the career ladder stays connected to all participants and reinforces SSM’s mission.

There have been many enhancements to the career ladder thanks to a dedicated and intentional love for our participants.

Listening to Our Employees

Career Ladder Representative Syllabus
(Feb 16’ - Aug16’)

Instructor Information
Instructor
Kendall R. Baker
Email
kendall.baker@ssm.com
Office Location & Hours
Corporate, 9-4 M-F

General Information
Description:
This syllabus was created to be a guideline and instructions on the latest course of action for completing your intern and Caspian courses. In addition, you will find an interesting schedule, a method of standardized course competencies, and other information which you may need at the start.

Expectations:
What is expected from you: To complete the ED course and Caspian to the 100% level on their current competencies. This is expected to be completed prior to the course start date. It is also expected of you to complete the [additional information here]

What you can expect from us: As a participant, you can expect open lines of communication from your manager and supervisor. Weekly updates at Department Meetings and In-Field Visits, and the ability to work with you as you continue to grow and expand your career here at SSM.

Orientation Seminar
Coming Soon

<table>
<thead>
<tr>
<th>Orientation (for participants)</th>
<th>Code</th>
<th>Time</th>
<th>Venue</th>
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<tbody>
<tr>
<td>St. Joseph Health Center</td>
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<tr>
<td>Central Region</td>
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<td>Behavioral Health Center</td>
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<td>St. Joseph Health Center</td>
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<td>St. Joseph Health Center West</td>
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The sky is the limit as far as the career ladder is concerned – Other departments have been clamoring to get their hands on the career ladder program.

SSM Health has developed the career ladder in a whole new way! – SSM Health’s Career Ladder Program has developed biannual newsletters and its own centralized website.

Annual Career Ladder Update

Yes, it really was a whole year ago when we launched the Career Ladder program and I am excited to share with you the progress and excitement that have unfolded since then.

Full of Confidence!

SSM Health’s leadership, harbor, and foundation has worked hard to develop a comprehensive and robust Career Ladder program that has captured the passions and aspirations of our employees. We are thrilled to see the growth and development of our Career Ladder program on a regular basis.

A gift, friends, family and to all!

Looking back at the past year, it has been a challenging and rewarding year. The Career Ladder program has helped to create a culture of growth and development for our employees.

For your information:

- The Career Ladder is in full swing and growing at an incredible pace.
- The program has seen significant improvements and progress.

If you have any feedback, comments, or suggestions, please do not hesitate to reach out to me. Your input is valuable and appreciated.

Your Career Ladder Team
Orientation Snapshot

- SSM leaders reviewed the HBI E-Learning course catalogue to select courses that aligned with the career ladder goals and had relevance to expected duties.

- Frontline staff and managers had input into Read to Lead selections based on what they value as skills and want to build abilities for in future leaders.

Career Ladder Orientation (Draft)

Location: St. Mary’s Health Center, Room N/A
Date: September 14
Time: 10:00am
Facilitator: Ronald Pasknett

Overview

This orientation was designed so that you, the participants would have a chance to see and experience the Career Ladder before diving right in. We believe that there is a great deal of potential in each and every one of you, and we believe that the Career Ladder can help ignite and foster that potential. This is a time where you will be able to ask questions, take notes and be led through the entire process on your way to wonderful benefits in the form of promotions and pay increases that you will be able to earn and achieve. The Career Ladder is a tool for you and for your benefit and we want you to take full advantage of everything it has to offer.

Agenda Items

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<tr>
<th>Time</th>
<th>Description</th>
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<tr>
<td>10:00am-10:15am</td>
<td>Introduction and Overview</td>
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<tr>
<td>10:15am-10:30am</td>
<td>HBI tutorial: A walkthrough of the courses and final exam and the website as a whole.</td>
<td>N/A</td>
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<tr>
<td>10:30am-10:45am</td>
<td>The process: A walkthrough of the next six months and what to expect.</td>
<td>N/A</td>
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<td>10:45am-11:00am</td>
<td>Tip Times: Course and test taking tips to maximize your learning ability and progress.</td>
<td>N/A</td>
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<tr>
<td>11:00am-11:30am</td>
<td>Questions and feedback: A time to have any questions and thoughts answered or brought to the service for discussion and resolution.</td>
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Career Ladder Representative Syllabus
[DRAFT Aug15’-Feb16’]

Instructor Information
Instructor: Ronald J. Paknett
Email: Ronald_paknett@innovis.com
Office Location & Hours: Corporate, 8-4 M-F

General Information
Description
This Syllabus was created to better guide and instruct on the best course of action for completing your courses and get abstracts. In addition, you will find an orientation schedule, a calendar of recommended course completion, and other information which may need to be relevant.

Expectations
What is expected of you: To complete the VHI courses and get abstracts with a 90% or better on their attached assessments. To have all work completed prior to the start of the session months in Feb and due and to be in Good standing with DAS.

What you can expect from us: As a participant you can expect open lines of communication from your managers and supervisors, timely responses and feedback to all questions and inquiries, and for us to work with you as you continue to grow and expand your career here at DAS.

Orientation Schedule (draft schedule)

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<th>Location</th>
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<th>Time</th>
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<tr>
<td>St. Clare Health Center</td>
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<td>St. Joseph Health Center</td>
<td>Sept 21</td>
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<tr>
<td>St. Joseph Health Center-West</td>
<td>Sept 22</td>
<td>10:00 am &amp; 2:00 pm</td>
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Course Schedule (Aug-Feb)

Month & Week | Course Title
-------------|-----------------|
Overview     |                |
Sep 15-19    | EVITALA         |
Sep 20-26    | HIPAA           |
Section 1    |                |
Sep 27-Oct 3 | Registration Basics |
Oct 4-10     | Registration Skills for Success |
Oct 11-17    | Critical Data Elements |
Section 2    |                |
Oct 18-24    | Insurance Basics |
Oct 26-31    | Insurance Plan Code Determination |
Nov 1-7      | Determining Financial and Medical Responsibilities |
Section 3    |                |
Nov 8-14     | Patient Liability Determination |
Nov 15-21    | PPO Collectors Skills for Success |
Nov 22-28    | Self-Pay Collection Skills for Success |
Nov 29-Dec 5 | Third Party Payer Billing |
Section 4    |                |
Dec 8-12     | Important Message from Medicare Overview |
Dec 13-19    | Medicare as a Secondary Payer |
Dec 20-26    | Red Flag Rules |
Review       |                |
January      | Get Abstract & Review Month. A chance to review quizzes and course materials, |

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The test is administered every **six months** with two opportunities each time to pass
- If a staff member does not pass and needs a second chance, they can have up to **two weeks** to study
- If they still do not pass, they can take test again in next testing period

Leaders make advancement decisions every six months, but they might not move an eligible staff member into a senior specialist role right away because those roles are **capped** at each facility
- Instead, they create a **waiting list**, and openings are filled after the waiting list folks are interviewed

108 registration staff members took the exam in February 2017

A 90% score on each component of the career ladder is necessary for advancement

100 passed with an average score of 95%

**Pass Rate of February 2017 Testing**

- Pass: 93%
- Fail: 7%

The February cycle of tests had the highest percentage of passing participants to date
To help prepare for the test, participants attend a career ladder **game night** a month before the test as an opportunity to study in a relaxed way
– Career ladder topics are presented through games modeled on **Jeopardy** and **Family Feud**

Managers also can **celebrate** their team members’ successes
– One facility has a **graduation breakfast** for any successful participants and presents them with graduation certificates
Results and Next Steps

Award-winning expansion and innovation
Considering Expansion

• The career ladder has applications across the system, not just within the revenue cycle

• Here at SSM Health, we are expanding to the rest of our revenue cycle, starting with our scheduling departments
  – Southern Illinois facilities have schedgistration instead of registration, so they needed their own “hybrid” career ladder, which went live in early September
  – The registration career ladder formed the backbone of the schedgistration career ladder, but some E-Learning courses have been swapped out to ensure there is also a focus on scheduling skills
  – Some additional components related to cross-training and specialization are being added

• Cross-training allows for individuals to be the catalyst for the success of the revenue cycle
Career Ladder Maintenance

• The patient access career ladder and project consultant regularly reviews the career ladder and its materials and makes updates based on staff feedback and leaders’ goals.

• Career ladder participants can make suggestions through an online discussion board that is dedicated to leadership development and related topics.

• A survey at the end of each testing period gathers additional feedback on what participants liked or disliked about the courses and readings, whether they have any proposed changes, and whether there were any topics that were especially challenging.
Planning for Innovation

• The career ladder program allows for SSM to recruit talented, driven employees who truly want a career in healthcare
• In June 2017, the Career Ladder Program won SSM Health’s Innovators Award
Planning for Innovation (cont.)
Questions?

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