



“Eliminating the Patient Clipboard”

James D. Keil, MBA, FACMPE

**California Orthopedic
Association/California Bones Society
2015 Annual Meeting**

Current State of Data Collection

- Typical Physician Appointment
 - Numerous Forms
 - Tons of Data, Manually Entered
 - Little or No Checkpoints to Confirm Correct Entry
 - Patient Experience Matters, Ongoing Relationship

- Typical Pharmacy Visit
 - Digitized Process
 - Benefits are Real-Time
 - Retail Product, No (Billable) Services, Limited Relationship

Current State of Data Collection

➤ Typical ER Visit

- Some Kiosk Check-In, Bottle-Neck Tolerated?
- Patient Experience Expectations Varied
- Episodic/Emergent Care

➤ Hospital Services

- Usually Pre-planned (Except ER)
- Forms are Varied and Don't Communicate Across Departments
- Patients Expect Us to "Communicate" Data to Hosp

Current State of Data Collection

- Other Industries (Airlines, Banks)

 - Industry video link:

- Physician Practice Progress

 - Paper Claims Conversion to NSF (1990s)

 - Complex Data, Many and Varied Fields

 - Healthcare Data Has Lagged Other Industries

 - No More Excuses – “Big Data” World

- Electronic Remittance Advice (ERAs), EFTs

The Need to Digitize

- Data Assimilation From Front-Office to Back-Office Care Team
- Shift Staff to Higher-Value Tasks
- Patient Scheduling Challenges
 - Limited Time to Obtain Data
 - Need to Call Patients to Obtain Data
- Patients Are Often Late
 - No Forms Are Pre-filled, Increases Wait
 - Forms Are On Paper, Then Entered to System

The Need to Digitize

- Point-of-Service Collections Challenge
 - Disconnect Between Patients and Their Benefits
 - Transfer of Responsibilities To The Patient
 - Total Service Costs Unkown, Pricing Transparency

- Eligibility and Verification
 - E&B's Needed Prior to Visit
 - E&B Hold Times are Long
 - Hard Stops Needed For Complete Demos

The Need to Digitize

- Eligibility & Benefits, Contd.
 - Data Errors Are Frequent
 - Staff Time is Stressed
- No Forms Integration with EPM/EMR
- Patient Signatures
 - Paper Must be Scanned or Filed
 - No Hard Stops if Forms Are Unsigned (Risk)
- Clinical Assessment Forms Require Data Entry

Challenges To Implementation

- Patients Have Limited Knowledge of Their Health Plan
 - Can Patients Enter Their Data With Accuracy?
 - How Do We Alter Our Waiting Room Processes

- Prior to Appointment
 - Print Forms from “Our Website” – Low Compliance Rate, Will Digital Compliance Be Higher?
 - Forms Are Varied, No Connectivity
 - Will Patients “Do Their Homework”?

Map Your Workflows

➤ Patient Visit

- How Many Forms Do you Have?
- Scheduling Process-How Many Hard Stops
- Patient Check-In Process
- MA Patient Intake
- Diagnostics: X-ray, DME, Injections (Benefits Alerts)
- Eligibility & Benefits Failed/Not Pre-checked
- Old Clinical Assessment on File, Updated?
- Data Captured, Re-entered by Staff?
- Is Front-Office Data Separate from Back-Office Care?
 - Everyone Is On The Revenue Cycle Team

What To Do?

➤ Staff Education

- Goals for Staff on Patient Compliance
- Demos Errors Feedback
- Multiple Data Checkpoints
- Claims Processing Feedback (Front/Back End Errors)

➤ Patient Education

- Scripting
 - Scheduling: Inviting Patient Involvement
 - Check-in/out: Last Checkpoint on Data?

What To Do?

➤ Portals

- Platform for Patient Clinical Info
- Documents Patient Communication Episodes
- Rarely Provides Method for Patient Demo Entry
- Can Be a Secure “Make a Payment” Site
- Can Be Appointment Request Connector (Be Available)

➤ EPM/EMR Vendor Solutions

- Most Likely Method to Interface Successfully
- Should Provide Secure Link For Data Entry, Clinical Info, HIPAA/Privacy
- If Your EPM/EMR Vendor Doesn’t Have a Kiosk, Ask to Be The “Pilot”

What To Do?

➤ The Role of Clearinghouses

- How Do You Perform E&B Confirmation?
- Phone E&B Must Be Manually Entered
- Do Your E&B Results Cancel Out Patient-Entered Data?

➤ Add-On Products

- Solutions for Patient Signatures (Privacy, Policy, Assignment of Benefits)
- Interface to EPM/EMR is Biggest Challenge

What To Do?

- Add-On Products, Cont'd.
 - If No Interface to EPM/EMR, Is It Re-Entry?
 - If Interface to EPM/EMR, How? Nightly Upload, Hourly?
 - SQL/HL7/Other Interface - Maintenance/Cost
 - Add-On Products Can Be More Robust
 - What If Add-On Products Become Ubiquitous w/Facility Interfaces?