Successful Patient Retention Strategies: Where Talent and Technology Merge

Presented to: Cleveland Clinic’s Patient Experience Empathy + Innovation Summit
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Agenda

• CTCA story
• Our approach to patient-centric care
• Creating CTCA® Journey Book
• Successes, applications and lessons learned
• Next steps
Our Story

- Founded in 1988 by Richard J Stephenson
- Network of five hospitals across country, focused only on cancer care
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• Mother Standard® of care
• Created the Patient Empowered Care® model to provide integrative approach to health care
• Net Promoter Score: 96.2%*

* Hospital average April 2014.
What was missing?

• How do we know when patients leave us ... and why?

Nearly 1 in 4 patients and caregivers are dissatisfied with their experience*

*Source: The Cancer Experience: A National Study of Patients and Caregivers, 2013
What was missing?

• How do we know when patients leave us ... and why?
• How do we stay connected to patients when they aren’t at CTCA?
• How do we proactively address patient needs when they are disengaging?
• Our stakeholders want to be more empowered

The answer ...
CTCA® Journey Book

- Microsoft® Dynamics CRM tool
- 600+ users (Clinical and non-clinical)
- Track a patient’s status from *New Patient* to *Survivorship*
- Centralized location to log non-clinical notes
- Understand care team workloads/productivity
- Create/track operational activities associated with patient care
- Identify retention “risks”
Applications

- Engage patients with limited English proficiency
- Follow passive/detractor patients
- Connect with patients:
  - Birthday card lists and “Just Checking In” postcards
  - Pastoral Care with Hospice patients
- Target barriers with patients pending decision
- Empower patients with knowledge of their benefits
- Create actionable retention reports with data slices
Successes

- Two pilots on Pending Decision patients:
  - 30% reduction in patients who decided not to seek treatment at CTCA
  - Proactive outreach on barriers - $3.2M in 2 months
- 50% faster turnaround in travel reimbursement checks
- Nurture email campaign driven by care management
- “One stop shop” to understand patient needs
Lessons Learned

- IT support is critical!
- Take it slow with the data
- Support and nurture your users

Protecting Patient Health Information (PHI) – Part 1
Cancer Treatment Centers of America® (CTCA) is committed to protecting patient privacy, as required under the Health Insurance Portability and Accountability Act (HIPAA). It’s your role to help in protecting our patient's privacy.

Journey Book is HIPAA compliant. It’s important for you to take precaution to protect individual patient information that relates to: an individual’s health, health care provided to an individual and payment for health care provided to an individual.

Each time you log on to Journey Book:
- Limit your use or disclosure of PHI to the minimum necessary amount to do your job.
- Ask yourself: “Is this PHI necessary for me to use or disclose in order to do my job?”
- In free text fields, type only the information you need to accomplish your job function.
- Look only at the information you need to do your job - nothing more.

Example 1: A Stakeholder is arranging transportation for a patient after his appointment.

The Stakeholder would need to view certain PHI to do her job, such as:
- Patient’s need for an oxygen tank or wheelchair
- Date and time of the patient’s appointment
Where do we go from here?

- Build usership
- Trend the data
- Develop new nurture initiatives to retain patients through survivorship and beyond
- Create process improvement projects
- Engage our patients and caregivers to ensure voice of the customer
Thank you!