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# Successful Patient Retention Strategies: Where Talent and Technology Merge

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

Presented by: Anne McLain, Patient Retention Director

Date: May 21, 2014



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## Agenda

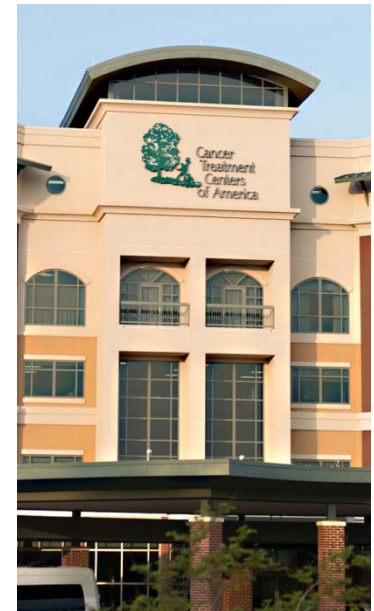
- CTCA story
- Our approach to patient-centric care
- Creating CTCA<sup>®</sup> Journey Book
- Successes, applications and lessons learned
- Next steps



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- Network of five hospitals across country, focused only on cancer care



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- Mother Standard<sup>®</sup> of care
- Created the Patient Empowered Care<sup>®</sup> model to provide integrative approach to health care
- Net Promoter Score: 96.2%\*

\* Hospital average April 2014.



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## 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



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## 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

File Contact Add ISV ISV Contact Form

Save Save & Close Deactivate Add to Marketing List Connect Assign Copy a Link E-mail a Link Run Workflow Start Dialog Run Report Upload Picture Transfer Patient Request Mileage Reimbursement Cancel Appointment Nadir Call

PRM

General Contact Information Patient Profile Patient Details Status Comments Attitudes Patient Insurance Inform... Patient Preferences Notes

Related

Common

- Activities
- Appointments
- Audit History
- Charge Codes
- Closed Activities
- Connections
- Event Attendance
- Facility Visits
- Financial Assistance
- Mileage Reimburse...
- More Addresses
- Patient Anniversaries
- Patient Comps
- Patient Status
- Relationships
- Sub-Contacts
- Transfer
- User Access

Marketing

MARY TRAN

Medical Record Number: 10200010  
Diagnosis: kidney cancer  
Contact Type: Patient  
Patient Status: Retained Patient  
Next Appointment: 6/20/2014  
Patient Stage: Active

General

Contact Type\*: Patient Gender:  Male  Female  
 First Name: [ ] Birthday: 6/14/1982  
 Middle Initial: [ ] Ethnicity: ASIAN  
 Last Name: [ ] Education: College  
 Preferred Name: [ ] PHI Password: MUSTANG  
 Name Pronunciation: [ ] Vendor Number: [ ]  
 Anniversaries: [ ]

Contact Information

Home Phone: [ ] E-mail: [ ]  
 Mobile Phone: [ ] Employer: [ ]  
 Office Phone: [ ] Preferred Contact #: [ ]

Address

Status Code: Active

## CTCA<sup>®</sup> Journey Book



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- Microsoft<sup>®</sup> 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"



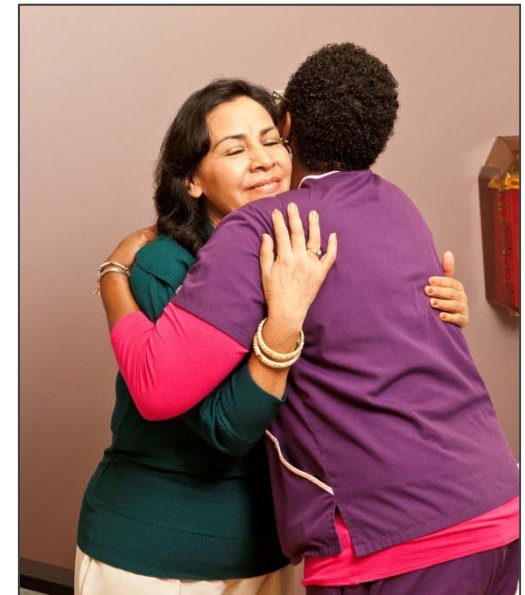
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## Applications

- 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





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## Lessons Learned

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

CTCA® Journey Book Proficiencies Helpful Hints, Tricks and Tips

### 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



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## 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





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# Thank you!