

Changes that Improve the Patient Experience

*IHA Conference
September 24, 2009*

Presenters:

Daniel Lewis, MD (Internist)

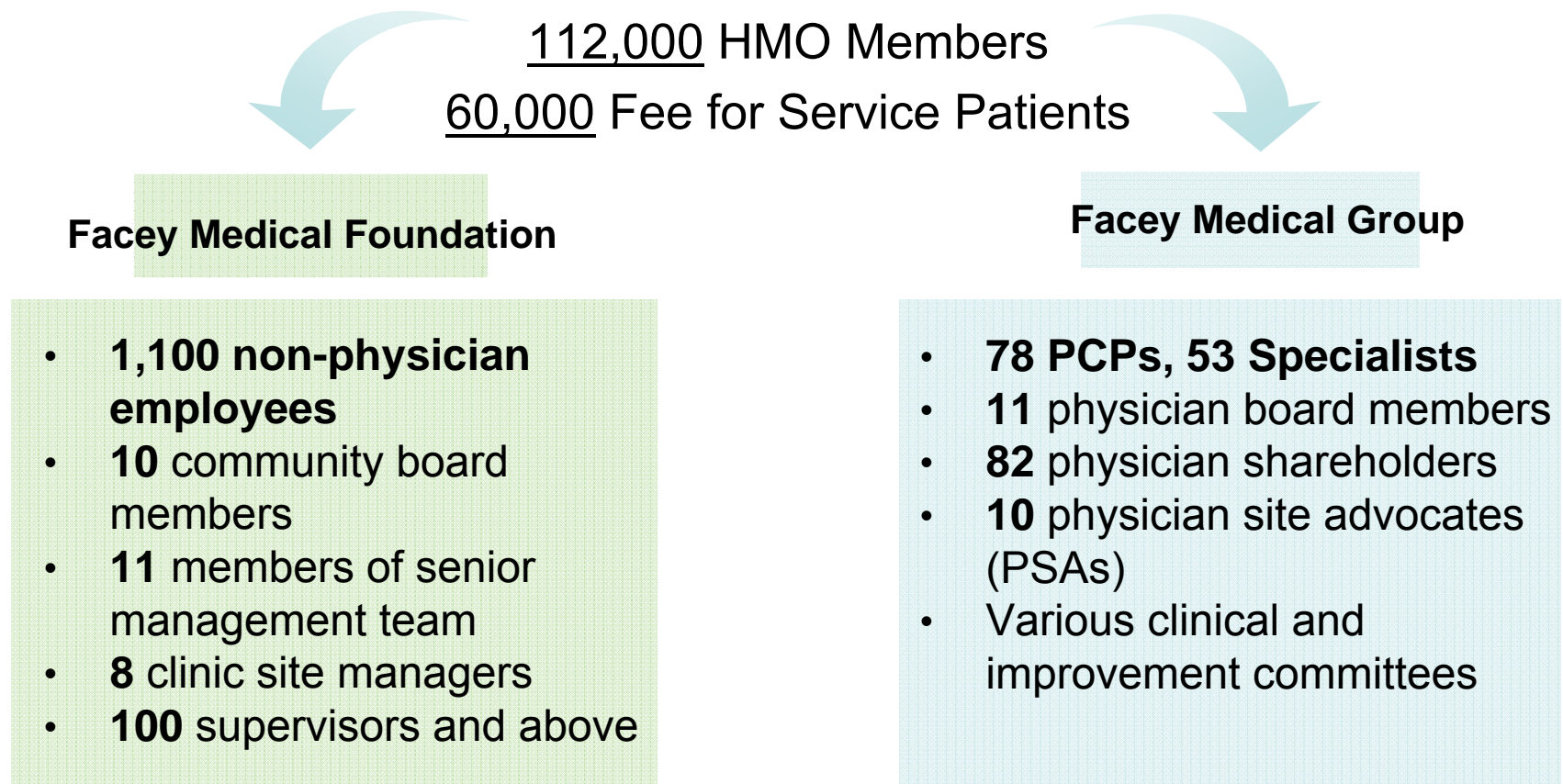
Stephanie Bamford, RN, BS

Administrative Director of QM

Agenda

- Overview of Facey
- Strategy & Leadership Roles
- Implementation & Spread plans
- Techniques that worked
- Results from Demonstrator Group
- Learnings & Challenges
- Testimonials & Next Steps

Facey is comprised of TWO entities:



Take away: Many groups to influence with different interests!

Facey's Three Regions



Created a Burning Platform Issue

5 Reasons for Action in 2008 (and Now):

1. Competition is growing
2. Customer service is one of the best ways we can differentiate Facey
3. Strategic Plan: One of the best ways to achieve *Provider of Choice* and *Employer of Choice* strategic goals!
4. Satisfaction: Physician, Staff & Patient Retention
5. Opportunity: Increased **P4P \$\$** on Patient Satisfaction Measures

Desired Results from the Calif. Quality Collaborative (CQC) “Improve the Patient Experience” Program

INCREASED

- P4P payment
- PAS Patient Experience ratings
- Doctor, staff, patient satisfaction
- Physician, Staff, & Patient Retention
- Productivity

Facey AIM Statement - 2008

CSI Facey strives to improve our overall rating of all health care by *2 points* on 2010 PAS scores from 81.6 (20th percentile) to 83.6 (50th percentile) by focusing on:

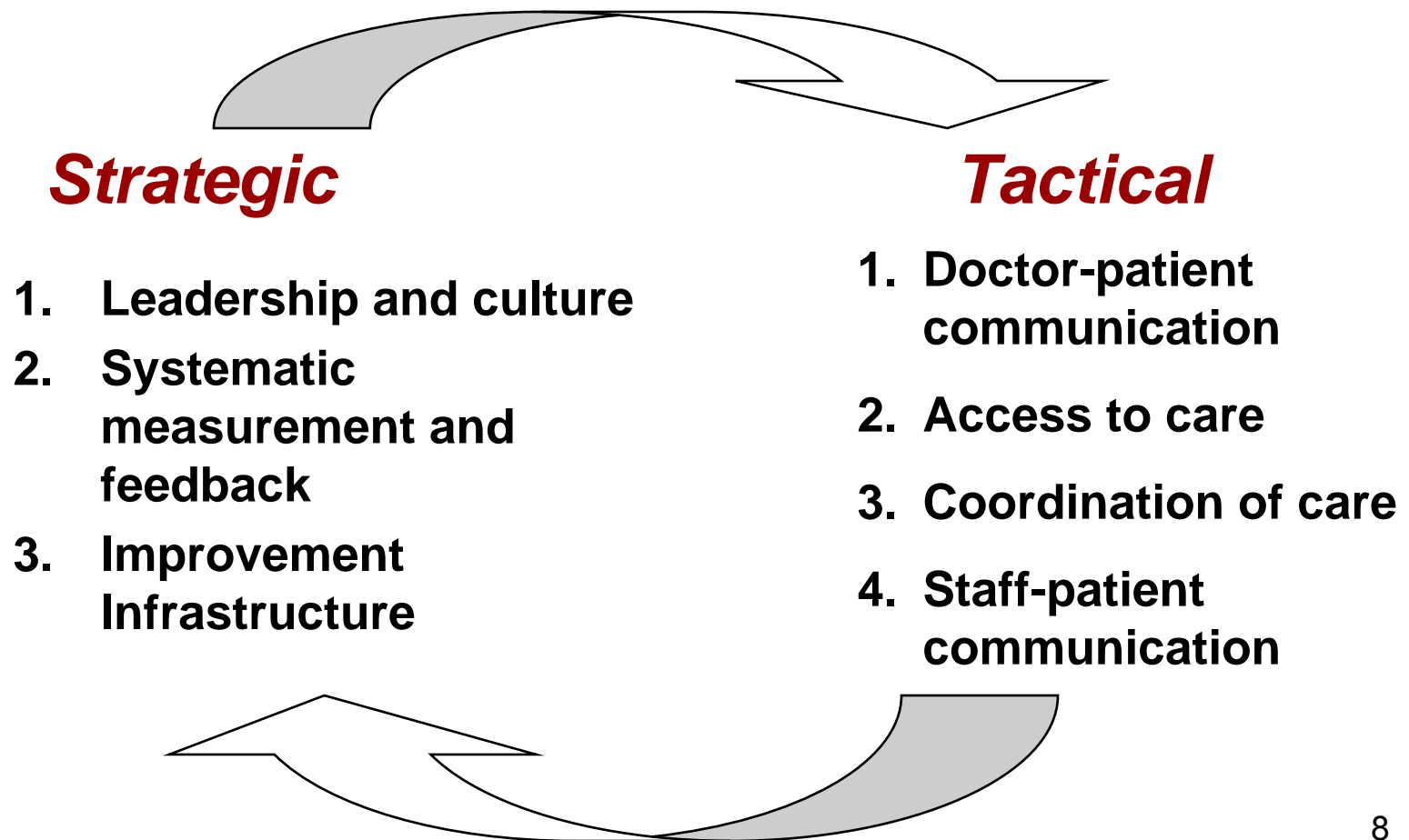
Doctor-Patient Interactions

Review patient chart prior to exam

Staff-Patient Interaction

At a minimum, we aim to positively impact 60,000 patients seen by 76 PCPs and selected specialists at our Mission Hills, Valencia I, and Northridge patient care sites.

Strategic & Tactical Considerations



Leadership's role to support success

- ✔ Join CQC Improving Patient Experience Collaborative
- ✔ Dedicate the necessary resources – **2+ year commitment**
- ✔ Strong physician peer support
- ✔ Continuous data collection & feedback
- ✔ CSI Facey is an agenda item at key physician and management meetings
- ✔ Be creative about our communication approach
- ✔ Provide incentives

Building the right team

- CEOs of FMG and FMF supported creation of CSI Facey work group
- CSI Facey comprised of high level executives that command resources and attention:

High-Profile Physicians:

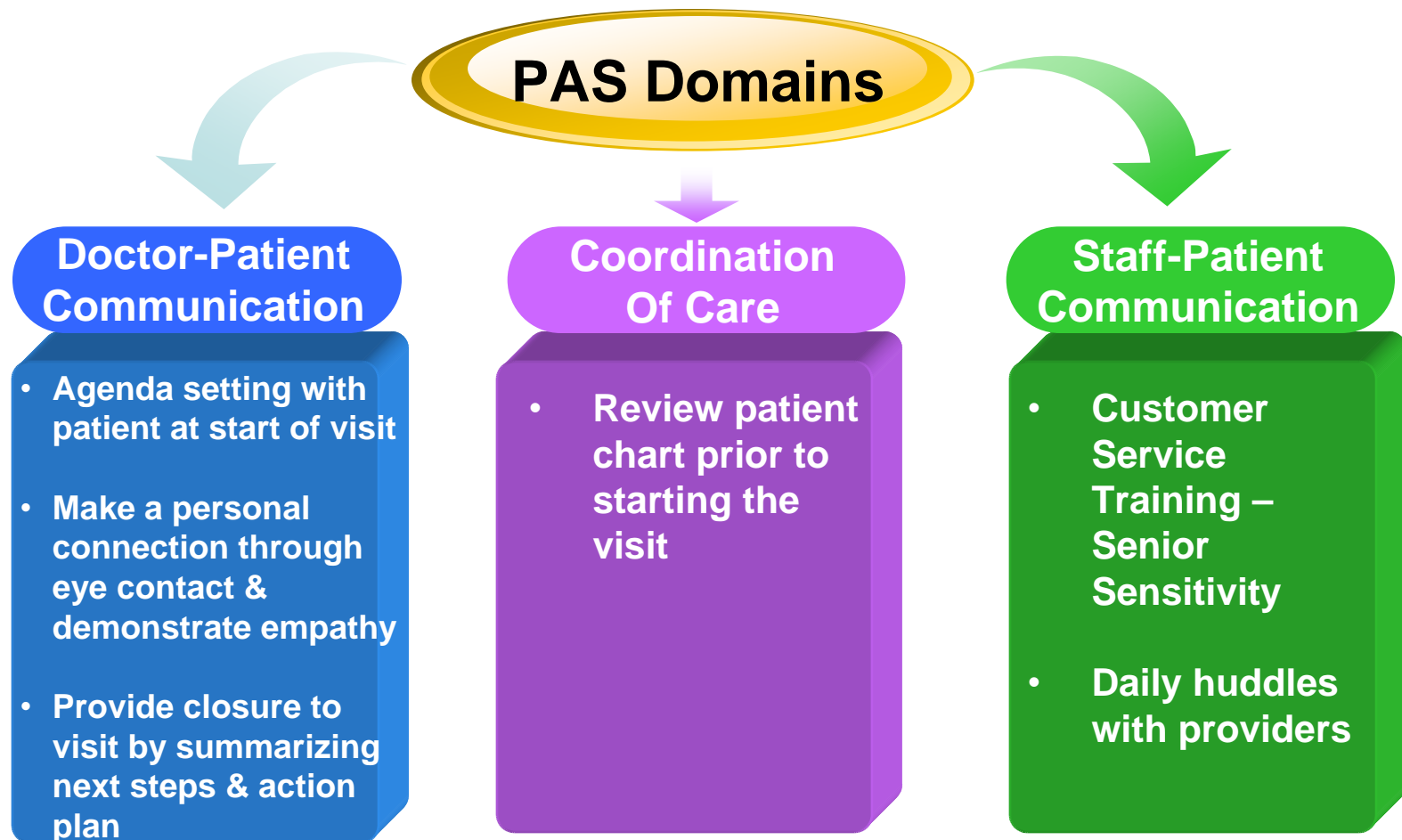
- FMG UM Director
- FMG QM Director
- Regional Director of Santa Clarita sites

FMF Leadership:

- FMF COO
- Regional Admin Directors of patient care sites
- FMF Admin Director of QM
- Director of Customer Service

- Dedicated Project Manager with a focus on CQC

We are committed to improving:



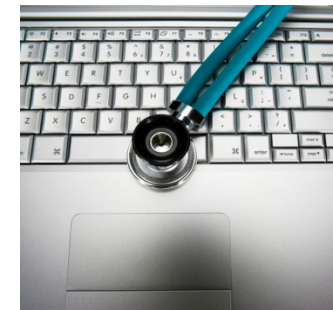
Tactic Development for 3 Domains

1 Doctor-Patient
Communication



2 Review the patient chart prior to exam

3 Staff-Patient Communication



① Doctor-Patient: Tactics & Preparation

- Kick-off meetings to introduce CQC, PDSA methodology, our goals and tools
- 4-hour training session with facilitator
- Focus on Agenda setting and one other technique
- CQC agenda item at monthly site physician meetings and key department meetings
- Personalized CQC “Toolkits” for each provider
- Identification of Physician “buddies”

② Reviewing chart: Tactics & Preparation

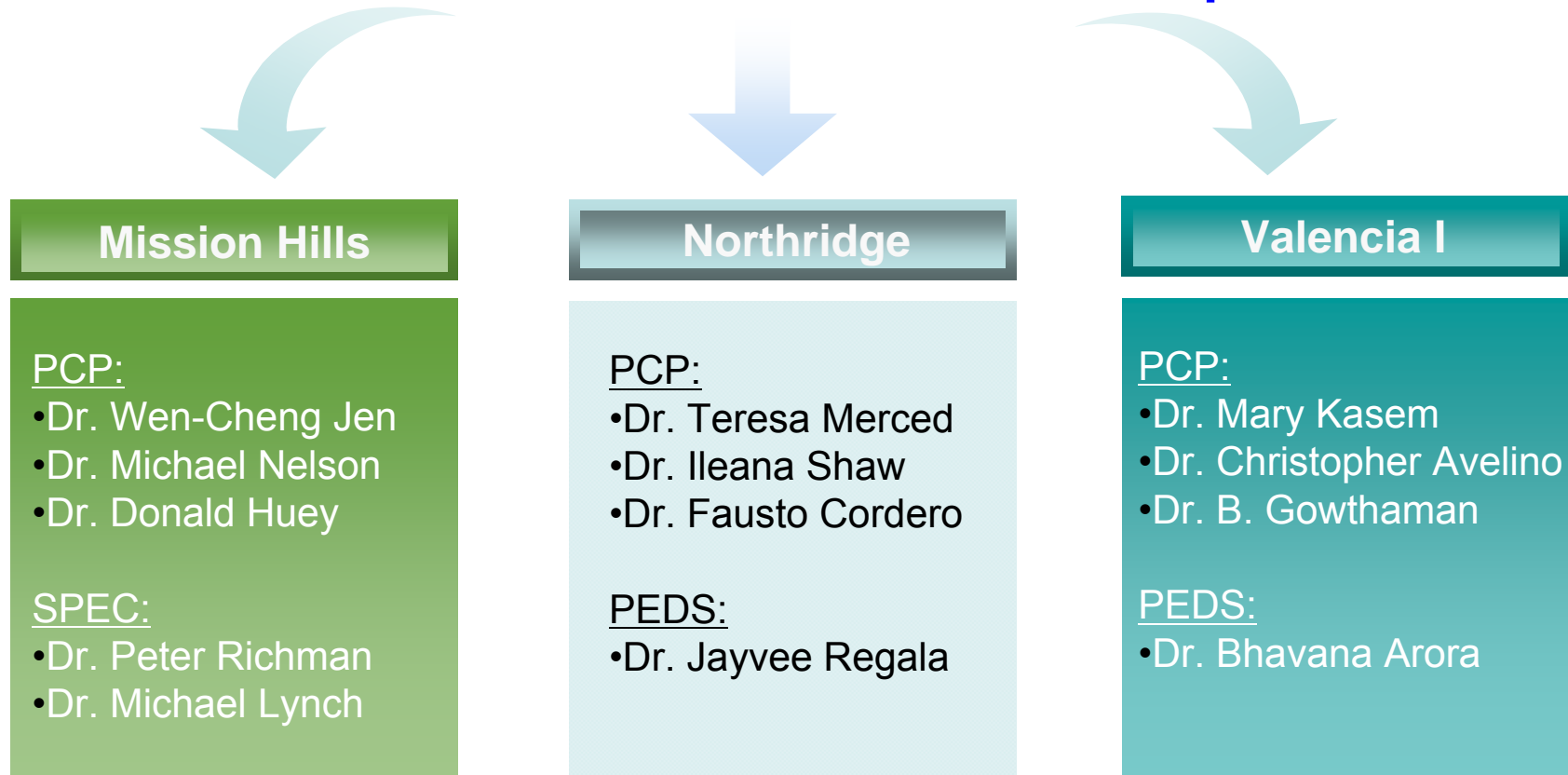
- LEVEL Best tactic: making the computer a valued tool – not a distraction during visit
 - Let the patient look on, make Eye contact, Value the EMR, Explain what you are doing, Log off and say it!
- CQC “buddies” encouraged this technique at face-to-face meetings with providers
- Created patient survey questions to measure this tactic
 - “How satisfied were you that the doctor seemed to know the important information about your medical history?”

3 Staff-Patient: Tactics & Preparation

- Train all FMF staff:
 - *Customer Service 101*
 - *Senior Sensitivity*
- Add to New Hire Orientation (Oct 2008)
- Monthly customer service tip sheet
- Monthly raffle drawings to reinforce skills
- Customer service on every meeting agenda
- Quarterly “road shows” to reinforce importance of customer service



13 Demonstrators Chosen - April 2008



Physician Observers: Dr. Daniel Lewis, Dr. Erik Davydov, and Dr. Eric Foxman

Administration Team: Teresa David, Pat Horanberg, Cathy Hawes, Stella Shroyer, Cathy Dougan, Nadine Serrano, Karen Carrol-Kowalski, Stephanie Bamford, Suzanne Yu 16

CQC Tools Developed

- AIM Statement templates (customized to MD)
- Agenda setting tool (customized to MD)
- Patient exit survey (customized to MD)
- Cliff notes on MD-Patient trainings
- Huddle presentation
- Monthly Narrative Report
- Weekly PDSA surveys tabulation status worksheet
- Facey CQC Newsletters & Customer Service Tips

Sample: Physician AIM Statement

MD - Patient Communication							Coordination of Care*						
<p><u>AIM Statement:</u></p> <p><i>Dr. Facey2 aims to improve his composite scores by 6 points. Improve the following by 6 percentage points: (1) easy to understand instructions; (2) know patient medical history; (3) spending enough time; and (4) listening carefully.</i></p>							<p><u>AIM Statement:</u></p> <p><i>Dr. Facey2 aims to improve Coordination of Care scores by 3 points over baseline by (1) reviewing the patient medical history prior to exam and (2) identifying visits with other providers and any follow-up tests/results.</i></p>						
Measure	2007 PAS	2008 PAS	MTC Baseline (May 2008)	MTC (Aug 2008)	MTC (Oct 2008)	MTC (Dec 2008)	Measure	2007 PAS	2008 PAS	MTC Baseline (May 2008)	MTC (Aug 2008)	MTC (Oct 2008)	MTC (Dec 2008)
Composite Score	83	92	95%	97%	95%	98%	Doctor informed and up-to-date about care from specialist doctors	78	81	95%	89%	91%	97%
<i>Explains things well</i>	84	94	96%	95%	97%	98%							
<i>Listens Carefully</i>	82	95	96%	97%	94%	98%							
<i>Easy to understand instructions</i>	81	91	96%	99%	94%	97%							
<i>Knows patient medical history</i>	83	89	95%	95%	95%	97%							
<i>Spends enough time</i>	80	88	93%	96%	95%	98%							
<i>Shows respect</i>	86	94	95%	98%	95%	99%							
Patient receives warm greeting	N/A	N/A	93%	97%	94%	98%							
<p>Recommended MD-Patient Comm. target improvement:</p> <p>< 87 Increase score(s) by 6 points</p> <p>87 - 91 Increase score(s) by 2 points</p> <p>> 91 Increase score(s) by 1 point</p>							<p>Recommended Coordination of Care target improvement:</p> <p>< 75 Increase score(s) by 6 points</p> <p>75 - 82 Increase score(s) by 2 points</p> <p>> 82 Increase score(s) by 1 point</p>						

*Phone Survey represents n=40 completed patient responses per survey period. % Patient Satisfaction = ((VS*1)+(S*.75)+(N*.5)+(D*.25)+(VD*0)) / No. of Responses



Dear Patient,

In order to address your health care concerns today, please complete the questions below:

What is the one main concern you would like Dr. Facey to focus on today?

What other concerns do you have today?

Do you need any prescriptions refilled today?

- Yes; please list _____
- No

Please list any *specialists* you have seen and *tests* you have had outside of Facey Medical Group since your last visit:

1. _____
2. _____

Thank you,

Dr. Facey

DOCTOR USE ONLY

Plan of Care:

Dear Patient,

Every day, my staff and I strive to give you a productive and enjoyable experience at our office. I ask that you complete this short written survey after our visit today so that we can evaluate how well Facey is meeting your expectations for care. In addition, you may also be contacted to take a telephone survey. The survey will have specific questions related to your experience with me and the Facey office staff. Your participation in our survey process will provide the feedback necessary to direct our efforts and would be greatly appreciated.

Dr. Facey

Please tell us about your visit with Dr. Facey today!

Date of visit: / /

	Poor	Fair	Good	Very Good	Excellent	N/A
1. How satisfied were you with the warmth of the doctor's greeting?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2. How satisfied were you that the doctor seemed to know the important information about your medical history?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3. Did the doctor spend enough time with you today?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Additional Comments:

Please let us know if there is something we could do to improve your visit with us today:

*Your feedback is appreciated and responses will remain confidential.
Thank you for choosing Facey Medical Group!*

**Sample:
Patient Exit
Survey Tool**

Sample Visual Cues



Facey's Spread Plan



May – Dec 08

13 Demonstrator
Doctors

- Learn about getting results at practices
- Develop physician & staff champions
- Understand what it takes to support practice changes

13
Practices

Oct 08 – Mar 09

Spread at 3 target
sites

- Design systems and tools to support changes for all providers at MH, NR, and VAL I target sites

76
Practices

Feb – Dec 09

Spread to remaining
Facey sites

- Implement tested systems & tools at sites and spread successful changes to remaining Facey sites

139
Practices

Measure continuously throughout to target 83.6 in "Overall Rating of Care" by PAS 2010

Strategies for ENGAGING Spread Adoption

- Stipend for attending training
- CQC “buddies” are paired with spread physicians to create an AIM statement and identify 1-3 techniques to focus on
- Site support staff and physician “buddies” hold monthly meetings with spread providers
- “CQC debrief sessions” to share results and strategies to sustain the program
- CQC as an agenda item at monthly site physician meetings and key department meetings

Data Collection is key!

- **Patient Exit Surveys**

- Customized to MD techniques
- Daily then weekly for rapid feedback



- **Telephonic member satisfaction surveys**

- 4 measurement periods for demonstrator MDs
- 40 surveys per measurement period in 2008
- 60 surveys for all providers in 2009 (Spread)

- **Provider & Staff satisfaction surveys**

- Same measurement periods



Patient Phone Survey Results for 13 Demonstrator Physicians

	Overall Care*				Rate Doctor*				All Questions*			
	<u>May</u>	<u>Aug</u>	<u>Oct</u>	<u>Dec</u>	<u>May</u>	<u>Aug</u>	<u>Oct</u>	<u>Dec</u>	<u>May</u>	<u>Aug</u>	<u>Oct</u>	<u>Dec</u>
All PCPs (11)	86.8	87.4	87.7	86.1	90.1	89.8	91.7	88.5	87.8	89.9	89.9	89.4
All Specialists (2)	84.7	86.8	87.9	85.9	89.9	92.5	92.0	88.9	85.2	86.0	90.2	88.9

* % Patient Satisfaction = (#VS*1 + #Satisfied*.75 + #Neutral*.5 + #Dissatisfied*.25 + #VD*0) / (No. of Answered Surveys)

Note: 40 surveys are completed per provider per measurement period

**Summary of
Phone Survey
Results for
Demonstrator
Group**

Phone Survey Question	Baseline (May) to October 2008*		Baseline (May) to December 2008*	
	PCP (11)	SPEC (2)	PCP (11)	SPEC (2)
Q12: Customer Service - Registration Staff	▲1.3	▲2.5	▲0.6	▲1.7
Q4: Doctor spent enough time	▲1.5	▲4.2	▲1.5	▲0.7
Q6: Doctor knows medical history	▲1.5	▲4.2	-	-
Q1: Doctor gave warm greeting	▼0.2	▲1.8	▲0.1	▲2.0
Q10: Got appointment soon	▲1.9	▼2.8	▲2.3	▼7.5
Q11: Wait time	▲0.3	▼3.0	▲0.6	▼4.0
Q7: Doctor knows about care from other doctors	▲0.2	▼0.4	▲0.4	▼3.7
Q9: Doctor gave easy instructions	-	▲2.4	▲0.8	▼1.8
Q5: Doctor addressed important concern	▲1.3	▲0.3	▼0.1	▼2.7
Q3: Doctor showed respect	▲0.7	▼0.1	▼0.5	▼1.7
Q8: Doctor explained well	▲0.3	▲3.6	▼0.6	▼1.6
Q2: Doctor listened	▲0.6	▲1.3	▼0.7	▼1.4
Q13: Customer Service - Clinical Staff	▲0.2	▼0.4	▼0.6	▼1.3
Q14: Overall Rating of Care	▲0.9	▲3.2	▼0.7	▲1.2
Q15: Rate Doctor	▲2.1	▲2.1	▲0.8	▼1.0

* Variance calculated as difference between baseline to the 3rd (October) or 4th (December) measurement period scores.

**Demonstrator
Physicians &
Staff Satisfaction
Online Survey
Results**

PERCENTILE RATING*	OVERALL		
	May (70)	August (68)	December (58)
I feel I deliver a high level of customer service to our patients.	86	92	94
Providers at my patient care site provide excellent customer service to patients.	76	85	83
The people in my work group have fun and enjoy working together.	81	83	83
I am treated with courtesy and respect by the providers.	84	88	83
I am treated with courtesy and respect by Foundation staff.	76	87	82
Facey provides me with the necessary tools and equipment to be efficient at my job.	77	84	81
Facey is a good place to work.	79	84	80
All in all, I am satisfied with my job.	83	84	79
I would recommend this medical office to loved ones as a good place to receive care.	75	81	75
There is good cooperation between the nurses, medical assistants, receptionists, and providers.	67	76	74
I am able to leave work on time.	61	69	62
AVERAGE BY POSITION	77	83	80

*Percentile Rating = ((#Strongly Disagree*1) + (#Disagree*2) + (#Neutral*3) + (#Agree*4) + (#Strongly Agree*5)) / Total # of Answered Surveys

So what happened in December?

Speculations:

- Economy?
- Holidays?
- Physician time off?
- Election survey/phone call exhaustion?
- Backsliding?



Learnings from Demonstrator December Phone Survey Results:

- **Inconclusive** findings on impact of external factors
- Debriefing meetings with the doctors and facility managers to share scores and obtain their insights
- “Backsliding”
- Peak scores in October: CQC program works but need to find ways to sustain techniques
- Use visual cues to “prompt” doctors
- Continue patient exit surveys at least once/week for immediate feedback

Techniques that worked & showed measured improvement:

- ✓ Use agenda setting tool at the beginning of the visit
- ✓ Set a realistic agenda for the visit and solicit the patient's feedback regarding doctor's recommendations
- ✓ Greet the patient (i.e. knocking on door, making eye contact, sitting down with the patient and not standing)
- ✓ Take 1 – 5 minutes to review the medical chart prior to the exam
- ✓ Huddle with support staff at least once/day helps doctor request assistance before visits happen and gives staff positive reinforcement
- ✓ Customer Service from the registration staff

Challenges

- Patients don't want to complete repeat surveys
- Extra Staff time to help translate and read surveys to elderly patients
- Staff forget to hand out agenda setting tool
- Getting medical assistants and receptionists on board with program
- Static change for providers with extremely busy and challenging patient panels

Overall Lessons Learned

- Time consuming to prepare quality communication pieces, survey documents and tools
- Essential to have **physician to physician** communication
- Communicate expectations of program at the beginning
- “Backsliding behavior” happens without continuous and immediate patient feedback!
- **Continuous data collection and feedback is critical!!!**

1

Doctor-Patient: Lessons Learned

- All key members of the physician management team need to be on board from beginning
- Training room set-up: conducive to engagement
- Ask trainer to focus on your key change areas
- Measurement data should be conducted, shared and discussed frequently

2

Reviewing chart: Lessons Learned

- Review takes from 1 – 7 minutes depending on complexity of chart
- Some providers always review the medical record but don't tell their patients
- Scores show improvement when providers **consistently** apply this technique

3

Staff-Patient: Lessons Learned

- Continuous reward and recognition is key to **sustaining** a customer service culture
- **Incentive dollars** must be dedicated (can be minimal)
- Create friendly competition across facilities

1

Doctor-Patient: Cost & Resources

- Four-hour training per group of 25: **\$5000**
 - *Trainer:* Dan O'Connell, PhD from Institute of Healthcare Communication (IHC)
 - *Format:* Lecture, role plays, videos, group exercises
- Provider stipends: **\$100 - \$200**
- Influential resources dedicated as CQC “buddies”

3

Staff-Patient: Cost & Resources

- In-house training resources (2)
- Overtime costs: 2.5 hour sessions streamlined to 1 hour sessions
- Incentive costs: \$10 cash raffled each week at each site
 - *Budgeted \$24,000 in staff incentives for CY 2009*

Where are we today?



Facey AIM Statement - 2009

CSI Facey strives to improve our overall rating of all health care by *2 points* on 2010 PAS scores from 81.6 (20th percentile) to 83.6 (50th percentile)

2007: 81.6 (20th) 2008: 82.1 (23rd) 2009: 83.7 (25th) 2010: ?

by focusing on:

Doctor-Patient Interactions

Review patient chart prior to exam

Staff-Patient Interaction

At a minimum, we aim to positively impact 60,000 patients seen by 76 PCPs and selected specialists at our Mission Hills, Valencia I, and Northridge patient care sites. Actual providers trained to date: 139

Patient Telephonic Results: 12 Demonstrator Physicians at 15 months

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* 40 surveys were completed for each provider in 2008; 30 surveys were completed/provider in 2009

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Physicians &
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Satisfaction
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Strategies for SUSTAINING Changes

- COO and UM and QM Medical Directors are key sponsors
- Facey Foundation & Group Boards kept well aware of the CQC project and expected results
- Executive management incentive includes benchmarks for CQC implementation
- Increased patient satisfaction component of physician compensation to 6% effective 2009
- Communicate CQC progress throughout Facey (i.e. intranet homepage, quarterly newsletter, and standing agenda item at department meetings)
- Plan to create friendly competition across sites

Leadership's Future Role



Fund budget to provide necessary dollars for training, measurement, and incentives



Continue broad spectrum communication plan to keep CQC in the spotlight



Fine tune approach (if needed) as spread continues

Added Benefits of CQC Program

- ✓ FMF employees have **embraced the importance of customer service** and speak the language of...CQC, Patient Experience, and Customer Service
- ✓ **Greater appreciation** of the benefits of teamwork
- ✓ A platform to launch our CQI initiatives
- ✓ Industry recognition for our efforts

Patient Testimonials

“The visit was a much more positive experience than my first and only visit with Dr. Chen back in July. He was very friendly today and took the time to review additional information me with.”

“Dr. Batah is the first Facey doctor to actually ask me if there was anything else or if I needed him to spend more time on a topic! I am very impressed!”

“I like the worksheet (agenda tool); it helps me not to forget anything.”

“I felt very comfortable with the welcoming of all the employees, they all showed care & concern.”

“Dr. Regala gave us his undivided attention and was willing to answer my questions (he even demonstrated stretches). My son said he made him feel like he (Dr. Regala) cared.”

Support Staff Testimonials

“Patients are happy to fill the forms out and tell us what we can do (to improve).”

“We have seen a decrease in the “Oh I forgot to ask the doctor” remarks since the implementation of the agenda tool.”

“I am more aware of how what I feel can affect my disposition towards the patient. Therefore, I am careful to always have a smile on my face and to be cheerful.”

“Program is working really well. Staff seem to want to help each other more.”

“We enjoy seeing the positive feedback from the patients. Reading the positive feedback is very encouraging.”

Provider Testimonials

“The patients have changed their perception of time because me asking is there anything else lets them know I will do whatever it takes to fulfill the needs of the appointment.”

- Dr. Hasan Chowdhury, Peds

“My attitude has changed and I now have more eye contact with my patient. I believed that I was listening but couldn’t convince them. Now, that is not an issue.”

- Dr. Peter Kim, Peds

“I have a positive mark for the program. It heightens the awareness of patient satisfaction and customer service aspect of patient care. The daily patient survey is a valuable tool. It provides continuous feedback to the provider for needed adjustment or improvement.”

- Dr. Magued Beshay, GI

“Staff seems more involved and more satisfied working at Facey.”

- Anonymous

Next Steps for Improving the Patient Experience

- Complete 2009 MTC surveys and reports (Nov)
- Present trended data
- Train new providers
- Support providers to sustain CQC techniques
- Customer Service “102” training
- Teambuilding between MAs, receptionists, and providers!