



## Today's Agenda

Review the charter

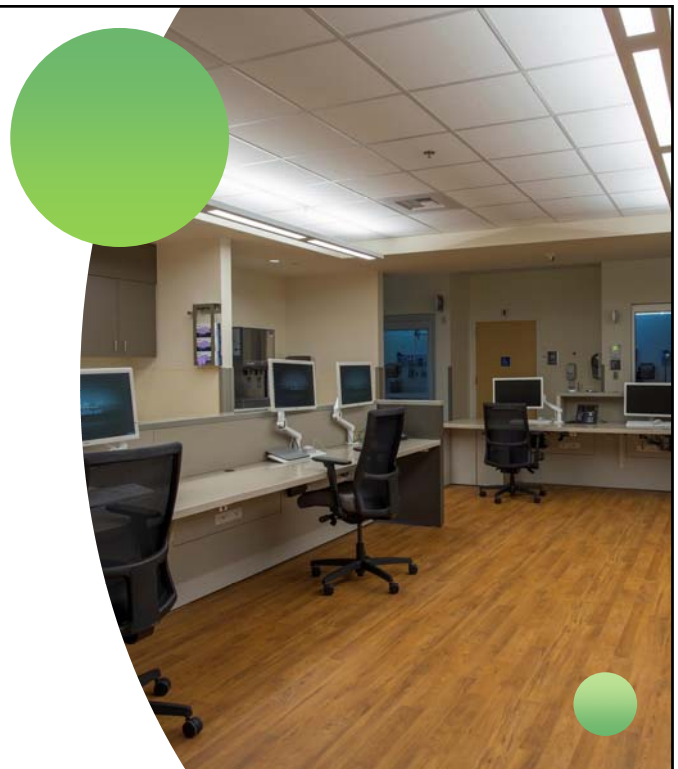
Taskforce timeline

Review our goals

Taskforce recommendations

- 1) meet people where they are
- 2) appeal to people who do not currently know about or find JH's programs approachable

What happens from here?



## Task force members: balanced participation from JH and community representation

### Jefferson Healthcare employees

- Hilary Whittington, CFO
- Jenny Goodwin, Director of Revenue Cycle Operations
- Erin Coffey, Manager of Patient Access & Compliance Officer
- Wenkie Schultz, Financial Counselor

### Commissioners

- Tony Deleo
- Matt Ready

### Community Members

- Steve Workman
- Susan Whitmire, Kitsap Bank

### Patients

- Dick Schulte
- Brian Vervynck
- Bruce McComas

### Legal Resources

- Ariel Speser

## The charter.

### Project name

- Patient financial experience task force (PFETF)

### Leadership

- Chair: Hilary Whittington
- Vice Chair: Erin Coffey
- Admin assistant: Elaina Harland

### Expected timeline

- April 19 kick off
- August 2017 recommendations

### Meeting frequency

- 6 meetings
- 2 - 4 weeks apart
- 1.5 - 2 hour meetings

### Areas affected (stakeholders)

- Patients
- Providers and clinical staff
- Financial counseling team
- Patient access staff
- Community

## The charter continued

### Purpose

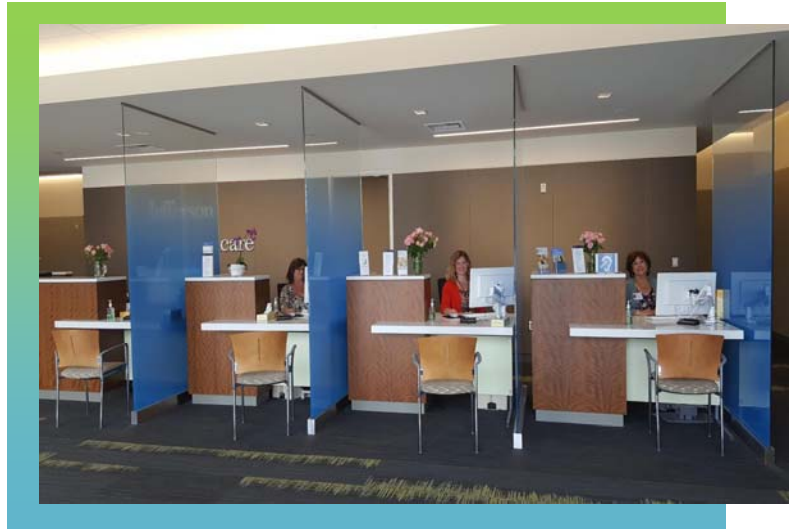
- Evaluate and affect our current policies, procedures, communications and tools to create a best practice patient financial experience

### Vision statement

- Standardize the patient financial experience to ensure transparency; empower patients with the information they need to make decisions

### Relevant organizational goals (strategic plan)

- Demystify healthcare economics



## The Meeting Timeline





## Review our **GOALS**

- **Decrease percent of inactive (no activity for more than 60 days) self-pay accounts**
- **Achieve staff core competencies of billing procedures and financial programs available for all patient access staff**
- **Increase number of patients working with financial counselors**
- **Decrease the number of patients sent to collections**
- **Decrease the number of patients that do not seek healthcare due to financial reasons**

## Our recommendations, in summary



### **Coordinate our Efforts**

Hospital wide, we are doing a lot of the right things. But, we our efforts are somewhat fragmented.

Internally, we have opportunities to pave a clearer path to connect patients with programs that meet their needs.



### **Be where our community goes.**

Many patients are already connecting with other agencies and attend community functions. By going to them instead of expecting them to come to us, we can diffuse the fear of seeking assistance.



### **Leverage technology**

Patients are seeking information in different ways than they used to – figuring out how to use automated solutions where we can will reduce the barriers for patients to connect with our financial assistance programs.

## Implement quickly (1-3 months)

| Coordinate our efforts           | Be where our community goes  | Leverage technology   |
|----------------------------------|--|---|
| Implement new charity care scale | Coordinate attendance of financial representatives at fairs and other community events <ul style="list-style-type: none"> <li>Attend in addition to board members/administration</li> <li>Bring financial assistance applications</li> <li>Have schedule available to make appointments</li> </ul> | Change language on statement to include availability of charity care/sliding fee<br><br>Include list of external resources when accounts hit pre-collect status |



## Updated Charity Care Scale

Update sliding fee scales to simpler/higher adjustment matrix; fewer categories, higher write offs for lower income brackets

## Proposed scale

Jefferson Healthcare - Proposed Sliding Fee Schedule 2017

| Family Size       | 100% Federal Poverty Level         | Gross Annual Income Parameters    |                                   |                         |            | Over 400%  |
|-------------------|------------------------------------|-----------------------------------|-----------------------------------|-------------------------|------------|------------|
| 1                 | \$ 12,060                          | \$0 - \$ 24,120                   | \$ 24,121 - \$ 36,180             | \$ 36,181 - \$ 48,240   | \$ 48,241  | \$ 48,241  |
| 2                 | \$ 16,240                          | \$0 - \$ 32,480                   | \$ 32,481 - \$ 48,720             | \$ 48,721 - \$ 64,960   | \$ 64,961  | \$ 64,961  |
| 3                 | \$ 20,420                          | \$0 - \$ 40,840                   | \$ 40,841 - \$ 61,260             | \$ 61,261 - \$ 81,680   | \$ 81,681  | \$ 81,681  |
| 4                 | \$ 24,600                          | \$0 - \$ 49,200                   | \$ 49,201 - \$ 73,800             | \$ 73,801 - \$ 98,400   | \$ 98,401  | \$ 98,401  |
| 5                 | \$ 28,780                          | \$0 - \$ 57,560                   | \$ 57,561 - \$ 86,340             | \$ 86,341 - \$ 115,120  | \$ 115,121 | \$ 115,121 |
| 6                 | \$ 32,960                          | \$0 - \$ 65,920                   | \$ 65,921 - \$ 98,880             | \$ 98,881 - \$ 131,840  | \$ 131,841 | \$ 131,841 |
| 7                 | \$ 37,140                          | \$0 - \$ 74,280                   | \$ 74,281 - \$ 111,420            | \$ 111,421 - \$ 148,560 | \$ 148,561 | \$ 148,561 |
| 8                 | \$ 41,320                          | \$0 - \$ 82,640                   | \$ 82,641 - \$ 123,960            | \$ 123,961 - \$ 165,280 | \$ 165,281 | \$ 165,281 |
| Percent Reduction | 100% Reduction<br>(Up to 200% FPL) | 75% Reduction<br>(Up to 300% FPL) | 50% Reduction<br>(Up to 400% FPL) | 0% Reduction            |            |            |

## Current scale

2017 Jefferson Healthcare Charity Guidelines 100% - 400% FPL


| % of Award | Number of Family Members |        |        |        |        |        |        |        |
|------------|--------------------------|--------|--------|--------|--------|--------|--------|--------|
|            | 1                        |        | 2      |        | 3      |        | 4      |        |
|            | Low                      | High   | Low    | High   | Low    | High   | Low    | High   |
| 100%       | -                        | 12,060 | -      | 16,240 | -      | 20,420 | -      | 24,600 |
| 90%        | 12,061                   | 16,080 | 16,241 | 21,653 | 20,421 | 27,227 | 24,601 | 32,800 |
| 80%        | 16,081                   | 20,100 | 21,653 | 27,067 | 27,228 | 34,033 | 32,801 | 41,000 |
| 70%        | 20,101                   | 24,120 | 27,068 | 32,480 | 34,034 | 40,840 | 41,001 | 49,200 |
| 60%        | 24,121                   | 28,140 | 32,481 | 37,893 | 40,841 | 47,647 | 49,201 | 57,400 |
| 50%        | 28,141                   | 32,160 | 37,894 | 43,307 | 47,648 | 54,453 | 57,401 | 65,600 |
| 40%        | 32,161                   | 36,180 | 43,308 | 48,720 | 54,454 | 61,260 | 65,601 | 73,800 |
| 30%        | 36,181                   | 40,200 | 48,721 | 54,133 | 61,261 | 68,067 | 73,801 | 82,000 |
| 20%        | 40,201                   | 44,220 | 54,134 | 59,547 | 68,068 | 74,873 | 82,001 | 90,200 |
| 10%        | 44,221                   | 48,240 | 59,548 | 64,960 | 74,874 | 81,680 | 90,201 | 98,400 |
| 0%         | 48,241                   | and up | 64,961 | and up | 81,681 | and up | 98,401 | and up |

2017 Jefferson Healthcare Charity Guidelines 100% - 400% FPL

| % of Award | Number of Family Members |         |         |         |         |         |         |         |
|------------|--------------------------|---------|---------|---------|---------|---------|---------|---------|
|            | 5                        |         | 6       |         | 7       |         | 8       |         |
|            | Low                      | High    | Low     | High    | Low     | High    | Low     | High    |
| 100%       | -                        | 28,780  | -       | 32,960  | -       | 37,140  | -       | 41,320  |
| 90%        | 28,781                   | 38,373  | 32,961  | 43,947  | 37,141  | 49,520  | 41,321  | 55,093  |
| 80%        | 38,374                   | 47,967  | 43,948  | 54,933  | 49,521  | 61,900  | 55,094  | 68,867  |
| 70%        | 47,968                   | 57,560  | 54,934  | 65,920  | 61,901  | 74,280  | 68,868  | 82,640  |
| 60%        | 57,561                   | 67,153  | 65,921  | 76,907  | 74,281  | 86,660  | 82,641  | 96,413  |
| 50%        | 67,154                   | 76,747  | 76,908  | 87,893  | 86,661  | 99,040  | 96,414  | 110,187 |
| 40%        | 76,748                   | 86,340  | 87,894  | 98,880  | 99,041  | 111,420 | 110,188 | 123,960 |
| 30%        | 86,341                   | 95,933  | 98,881  | 109,867 | 111,421 | 123,800 | 123,961 | 137,733 |
| 20%        | 95,934                   | 105,527 | 109,868 | 120,853 | 123,801 | 136,180 | 137,734 | 151,507 |
| 10%        | 105,528                  | 115,120 | 120,854 | 131,840 | 136,181 | 148,560 | 151,508 | 165,280 |
| 0%         | 115,121                  | and up  | 131,841 | and up  | 148,561 | and up  | 165,281 | and up  |

## 3-6 months

| Coordinate our efforts  | Be where our community goes   | Leverage technology  |
|---|---|--|
| Enhance social and print media  | Design education program and materials for distribution/sharing with other agencies (prepare for 6-12 month plan) | Include information on discharge summary about payment options |
| Marketing plans to reference to financial assistance programs   |   |  |
| Adjust contract with Audit & Adjustment to require scripting about the availability of charity care/sliding fee |   |  |
| Implement clear copays/coinsurance collection processes, hospital and clinics-wide                              |   |  |



## 6-12 months

| Coordinate our efforts  | Be where our community goes   | Leverage technology   |
|---|---|---|
| Reconsider branding/name of the financial counseling team/financial services office; focus on a tone of empathy and support to create a warmer invitation   | Quarterly sessions – “Understanding healthcare finances” <ul style="list-style-type: none"> <li>Partnership with other community resources</li> <li>Advertise in newspaper, at JH, and other local agencies</li> <li>Educate other agency employees about options available</li> <li>Posters with cards with dates available (tear off or pile of cards)</li> </ul> | Modify the website <ul style="list-style-type: none"> <li>Clearer language and instructions</li> <li>Clear payment timeline</li> <li>Calculation tool for potential adjustment</li> <li>Modify online payment tools</li> <li>Add information about how to make appointments outside of business hours</li> <li>Chat function</li> </ul> |
| Provider training related to financial counseling options   |   | Adjust phone messaging to reference financial options   |
| Communicate stats for financial counseling to reduce the stigma of charity care   |   | YouTube videos about financial options and understanding your bill  |
| Training for staff (registrars, schedulers and referral coordinators) about: <ul style="list-style-type: none"> <li>Financial counseling process</li> <li>Other community programs available</li> <li>Pharmaceutical expense assistance (include this in other outreach efforts)</li> </ul> |   | Looped video about payment options for community outreach events  |



## What are we missing? Where are the gaps?

Will these strategies meet patients where they are?

Will these strategies attract people that do not currently find JH or the billing process approachable?

## What happens now?



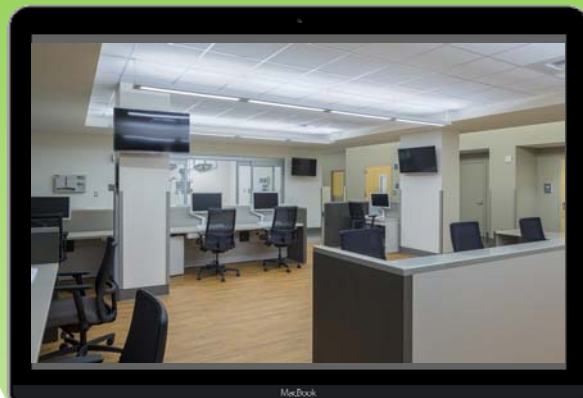
Take the list and make a work plan.

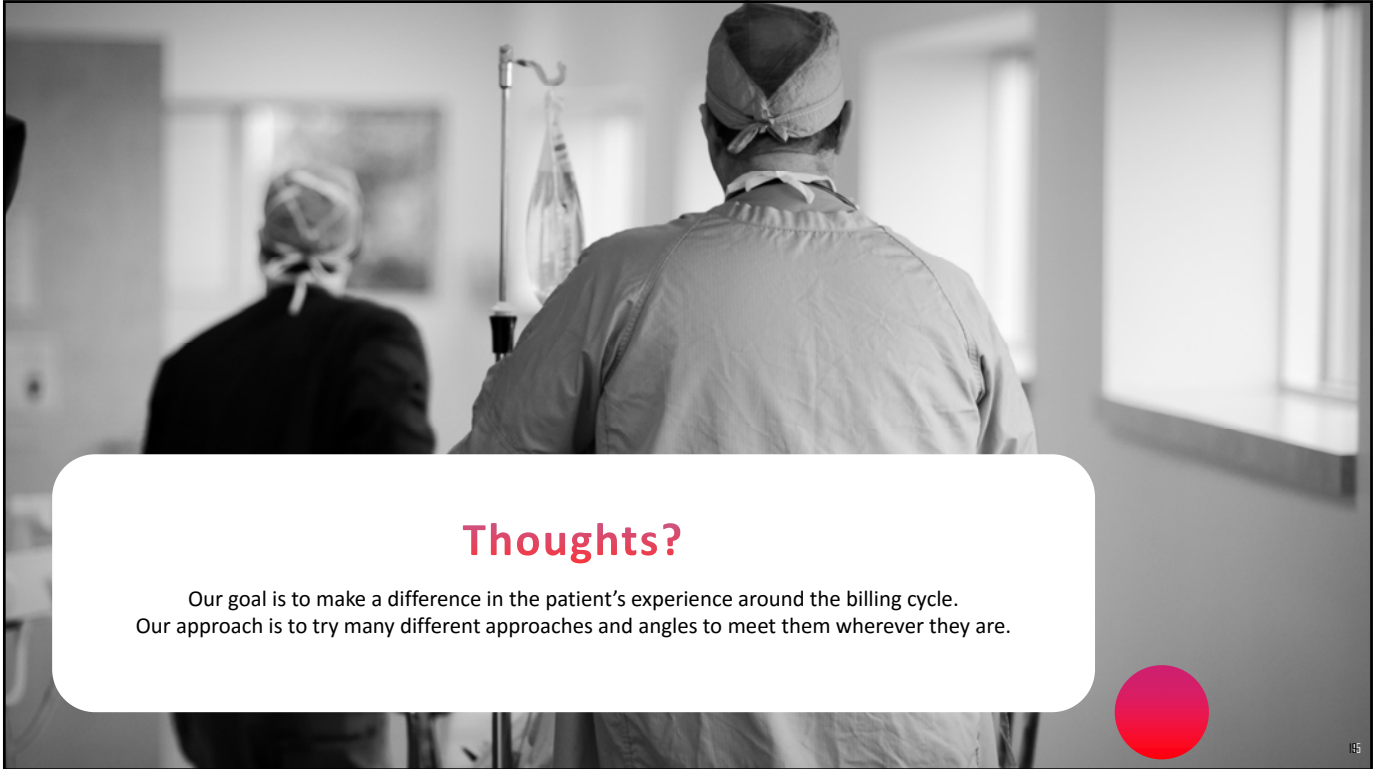


Nail down the benchmarks and method of measuring success.



Measure and repeat.





## Thoughts?

Our goal is to make a difference in the patient's experience around the billing cycle.  
Our approach is to try many different approaches and angles to meet them wherever they are.