hfma
massachusetts-rhode island chapter

26th Annual Revenue Cycle Conference
From Kickoff to Cashflow: Building a Winning Revenue Cycle

EDUCATION WITH A FOCUS ON RETENTION

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Banner-at-a-Glance 2024 | Year-end 2023 performance

Overview

$14.1 B	$760M	AA-	55K+	
in revenue	in community benefits, including in charity	bond rating	total Banner team members	Providing services in AZ, CA, CO, NE, NV and WY

Our customers

1,208,722 covered lives	6,400,581 clinic visits	1,689,696 outpatient visits	815,246 ED visits	601,475 urgent care visits
261,590 admissions	83,883 observation cases	175,450 home health visits	187,737 surgeries	34,527 deliveries

Our portfolio of services

Plans and Networks

- Commercial and marketplace plans
- State and federal government sponsored plans
- Accountable Care Organizations and Clinically Integrated Networks
- Population Health Services Organization
- Other provider networks

Ambulatory

- Urgent care
- Ambulatory surgery centers
- Concierge medicine
- Specialty care
- Primary care
- Occupational health
- Cancer centers
- Imaging centers
- Outpatient physical therapy

Acute

- Academic medical centers
- Urban hospitals
- Rural hospitals
- Children's medical centers
- Behavioral health hospital
- Heart hospital

Post-Acute

- Inpatient rehabilitation
- Home health
- Hospice and palliative care
- Home infusion
- Home medical equipment

Services

- Pharmacy services
- Lab services
- Telehealth
- Air and ground ambulance services
- Athletic performance

WHERE THE JOURNEY BEGAN…

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KEY FACTORS

New Senior Level Banner Leadership in Revenue Cycle	Gap analysis of the PAS education teams (Acute/Ambulatory)	Solution
• Hyper focused on education and creating a best-in-class RCM team • New leaders' new vision	• Decentralized • Reporting up through different service lines and leaders • Limited scope based on current areas of focus • Disparate leadership expectations • Potential for inefficiencies	• Centralize PAS Education teams • Create and hire Director of RC Education and Quality • Reduce Silos across Revenue Cycle

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SOLUTION BENEFITS

THE SOLUTION

- The Solution
  - Hired Director
  - Centralized PAS educators to one team
    - 8 Acute focused educators
    - 4 Ambulatory focused educators

PROJECTED BENEFITS

- Projected Benefits
  - Promote growth and development for our staff through learning new technology and skills across the education, quality and analytics spectrum.
  - Creates an integrated team to roll new technology across acute and ambulatory service lines.
  - Reduces silos across the system to come together as an integrated team who perform functions across the spectrum of Revenue Cycle.
  - Support growth of additional departments for Educational needs
  - Single point of contact for Revenue Cycle Education

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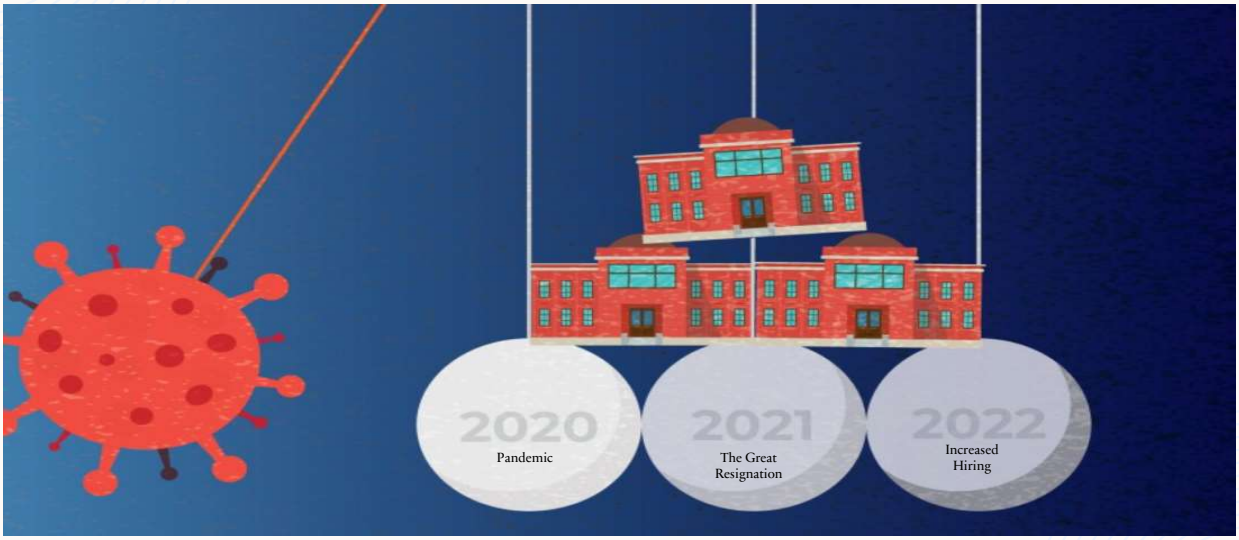

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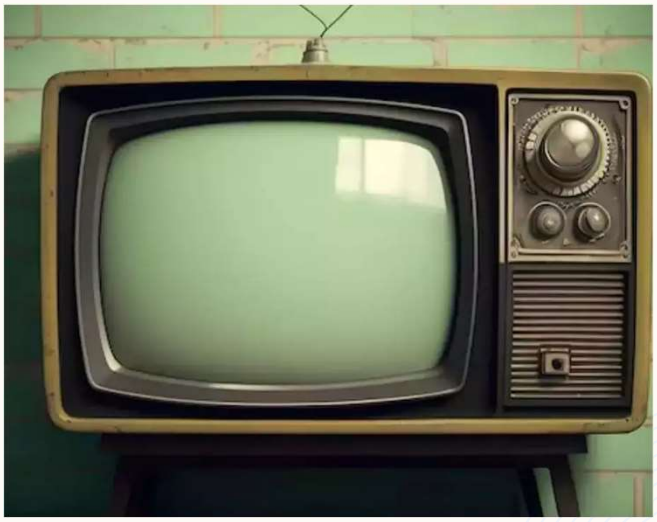
PIVOT TO VIRTUAL INSTRUCTION

- During the same month we completed our centralization the directive to shelter in place was activated.
- This directive initiated an immediate pivot to 100% virtual instruction.
- It was clear we had a major technology deficit, and new tools would be necessary.



TECHNOLOGY DISCOVERY

FINDINGS

Weaknesses
• No dedicated LMS
• Multiple areas for content
• Increased turnover
	Threats
	• The inability to effectively train
	  • New employees
	  • Continued education for process/workflow changes

Strengths • Centralized education team • High performers • Innovative mindsets	Opportunities • Leverage our internal HR LMS system • Engage a vendor for content creation and interactive learning modules

OPPORTUNITIES

Engage a Vendor for Content Creation

- Signed a contract with vendor
- Implemented a project lead from current central team
- Project Manager from the vendor side

Content Creation

- Banner specific workflow integration
- Consistent formatting
- Interactive "click" actions
- Informative captions
- Interactive text entry
- Knowledge checks
- Scored assessments
- Voice over technology

Leverage our Internal HR LMS

- Implemented a dedicated RC widget in the LMS
- Uploaded interactive content

Benefits

- Exposed to LMS activities and system maintenance requirements
- Great engagement from HR partners
- Able to utilize widget for in and out-of-scope departments for cross venue access

Limitations

- No ownership
- Limited admin rights
- No build capabilities
- System HR tool

EXPANDING THE VENDOR PARTNERSHIP

Learning Management System Implementation:

Expanded contract with content vendor to purchase a Banner Rev Cycle owned LMS

- Configurable & highly customizable (beyond just changing colors and logos)
- Ability to grow effectiveness and functionality
- Access to personal vendor development and support
- Banner Education team ownership of any courseware design assets
- Integration opportunities

Design will support internal and external initiatives as needed – "one stop shop" – Experience for Revenue Cycle

Revenue Cycle Career Path/Certifications:

Purchased Certification Package with a Nationally Recognized Partner

- 4 Certification Opportunities
- 7 Curriculum Packages for advanced learning
- Area specific e-Learning
- Purpose-driven curriculum ladders in order promote career growth
- Integration into LMS
- Allows for staff to achieve personal and professional development goals through E-Learning offerings

GROWTH & OPTIMIZATION

CUSTOMER EXPANSION

- Acute Billing
- Ambulatory Billing
- Patient Balance Management
- Banner Imaging Services

RESOURCES

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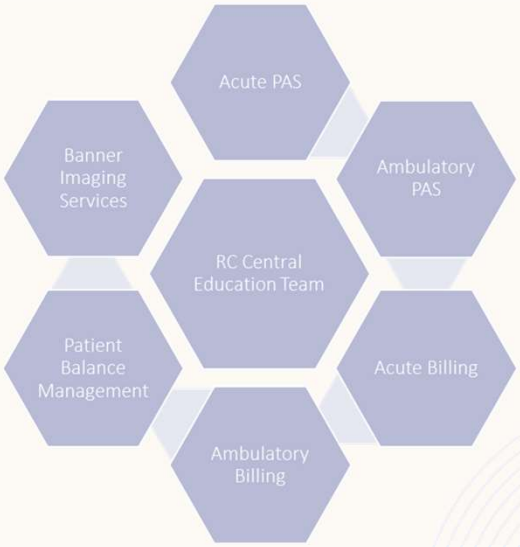

BRANDING

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CREATED MISSION AND VISION STATEMENTS

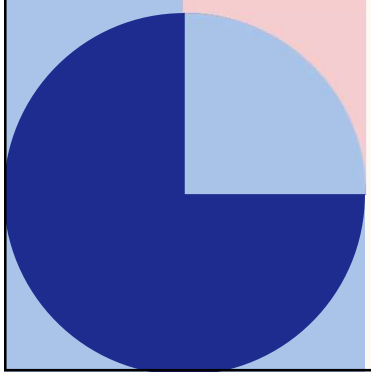
- Mission statement
  Educate & Innovate-Inspiring you today for a successful tomorrow.
- Vision Statement
  Through a combination of auditing, reporting, and education, we provide innovative resources to inspire our end users for an efficient and successful Revenue Cycle experience.

NAME THE LMS

- Created a contest to engage customers and team members to "name" our new custom LMS.
- RevUp University

LOGO

- Working with our marketing team we created a branded logo for our education program content.



OPTIMIZE!

Internal Team Optimization

- Class Calendars in RevUp
  - New Hire Training
  - Advanced Learning
  - Lunch & Learns
- Explainer Videos
  - 2-3 min
  - Animated
  - Workflow/processes
  - Internal & External Customers
- Usage & Reporting features

Customer Optimization

- Badges/Gamification
- Spotlight videos
- Extensive Content Library
- Consistent Effective Training
- Standardized documents
- Annual Learning

LET'S RECAP THE JOURNEY SO FAR...

FOCUS ON RETENTION

2023 to Present

ON-BOARDING CULTURE

Previous State	Current State
No connection between the leaders and new hire employee until after training. • Usure who they report to • Uncertainty for the new hire • No ability to connect	Trainee starts their new hire journey with the direct leader and team. • Increased accountability • Connection to their team
Limited exposure on what to expect in training. • Who the educator is • Trainee's role/expectations in class • No ability to connect to education	Service area specific welcome playbook. • Introductions • Meet your educator • Trainee role/expectations • Program overview
Manual class sign-up with limited tracking. • Outdated tools • Multiple "hands in the pot"	Class schedules and training sign-up all housed in the one-stop-shop RevUp University.

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REINFORCEMENT PROGRAM

Educator at 30 days will set up time with new hire to review the following:

Registrations demographic basics.
Review productivity KPI
Collections
Registration Accuracy
Ensure rep has all necessary tools
Review Education updates
Answer any additional education questions
Add 30-day check-in RevUp Badge

Educator at 60 days will set up time with new hire to review the following:

RevUp University
Review Productivity KPIs
Collections
Registration Accuracy
Make sure all applications working correctly
Review Education updates
Review accounts/ workflows
Add 60-day check-in RevUp Badge

Educator at 90 days will set up time with new hire to review the following:

Recap last 90 days
Review Productivity KPIs
Collections
Registration Accuracy
Complete competency checklist
Add 90-day check-in RevUp Badge

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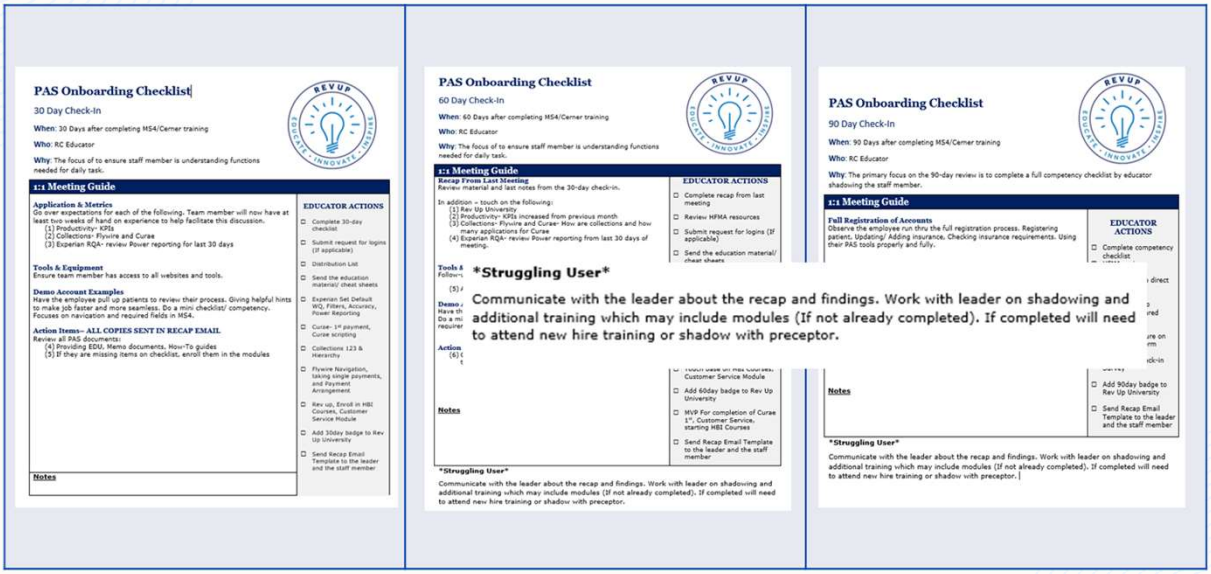

PAS Onboarding Checklist

30 Day Check-In

When: 30 Days after completing MS4/Cerner training

Who: RC Educator

Why: The focus of to ensure staff member is understanding functions needed for daily task.

1:1 Meeting Guide

Application & Metrics
Go over expectations for each of the following. Team member will now have at least two weeks of hand on experience to help facilitate this discussion.
(1) Productivity- KPIs
(2) Collections- Flywire and Curae
(3) Experian RQA- review Power reporting for last 30 days

Tools & Equipment
Ensure team member has access to all websites and tools.

Demo Account Examples
Have the employee pull up patients to review their process. Giving helpful hints to make job faster and more seamless. Do a mini checklist/ competency. Focuses on navigation and required fields in MS4.

Action Items– ALL COPIES SENT IN RECAP EMAIL
Review all PAS documents:
(4) Providing EDU, Memo documents, How-To guides
(5) If they are missing items on checklist, enroll them in the modules

EDUCATOR ACTIONS
- Complete 30-day checklist
- Submit request for logins (If applicable)
- Distribution List
- Send the education material/ cheat sheets
- Experian Set Default WQ, Filters, Accuracy, Power Reporting
- Curae- 1st payment, Curae scripting
- Collections 123 & Hierarchy
- Flywire Navigation, taking single payments, and Payment Arrangement
- Rev up, Enroll in HBI Courses, Customer Service Module
- Add 30day badge to Rev Up University
- Send Recap Email Template to the leader and the staff member

Notes

PAS Onboarding Checklist

60 Day Check-In

When: 60 Days after completing MS4/Cerner training

Who: RC Educator

Why: The focus of to ensure staff member is understanding functions needed for daily task.

1:1 Meeting Guide

Recap From Last Meeting
Review material and last notes from the 30-day check-in.

In addition – touch on the following:
(1) Rev Up University
(2) Productivity- KPIs increased from previous month
(3) Collections- Flywire and Curae- How are collections and how many applications for Curae
(4) Experian RQA- review Power reporting from last 30 days of meeting.

EDUCATOR ACTIONS
- Complete recap from last meeting
- Review HFMA resources
- Submit request for logins (If applicable)
- Send the education material/ cheat sheets
- Add 60day badge to Rev Up University
- MVP For completion of Curae 1st, Customer Service, starting HBI Courses
- Send Recap Email Template to the leader and the staff member

Notes

Struggling User
Communicate with the leader about the recap and findings. Work with leader on shadowing and additional training which may include modules (If not already completed). If completed will need to attend new hire training or shadow with preceptor.

PAS Onboarding Checklist

90 Day Check-In

When: 90 Days after completing MS4/Cerner training

Who: RC Educator

Why: The primary focus on the 90-day review is to complete a full competency checklist by educator shadowing the staff member.

1:1 Meeting Guide

Full Registration of Accounts
Observe the employee run thru the full registration process. Registering patient. Updating/ Adding insurance. Checking insurance requirements. Using their PAS tools properly and fully.

EDUCATOR ACTIONS
- Complete competency checklist
- Add 90day badge to Rev Up University
- Send Recap Email Template to the leader and the staff member

Notes

Struggling User
Communicate with the leader about the recap and findings. Work with leader on shadowing and additional training which may include modules (If not already completed). If completed will need to attend new hire training or shadow with preceptor.

MANAGER NAVIGATION

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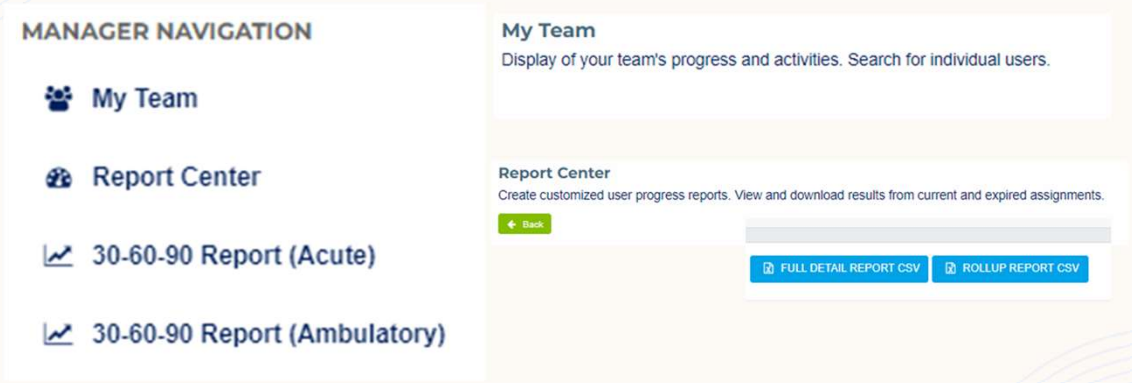

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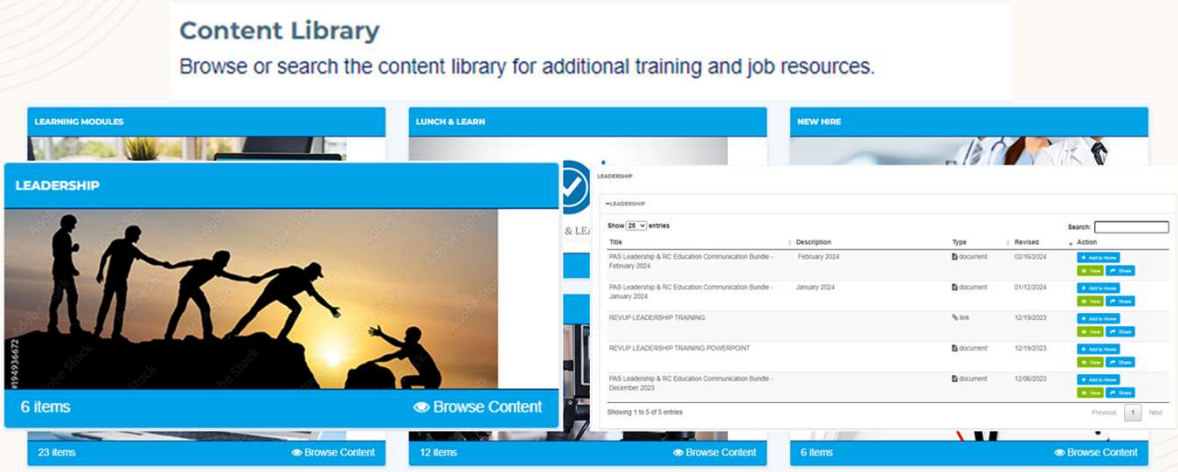

Multi-Disciplinary Operational Improvement Committees

PAS Retention & On-Boarding Committee

- Developing recruiting & interview tools
- On-boarding checklist
- Standard welcome

Education Collaboration Committee

- Creating video for common registration errors
- Implementing a Chatbot feature in RevUp University
- Advisory team for all upcoming education

Education & Quality Team Committees

Resource Analysis Committee

- Create KPI's & Productivity Tracking
- Resource Utilization
- Resource Gaps

Effective Communication Committee

- Standardize communication across customers
- Create automated templates/forms
- Bridge system outages into one location

Content Creator Committee

- Create new ways to share education materials
- Enhance end user content
- Standardization

Optimization Committee

- Bridge QA results to Education needed
- Enhance leader insights
- Real-time registration accuracy leader dashboard

RECIPE FOR SUCCESS

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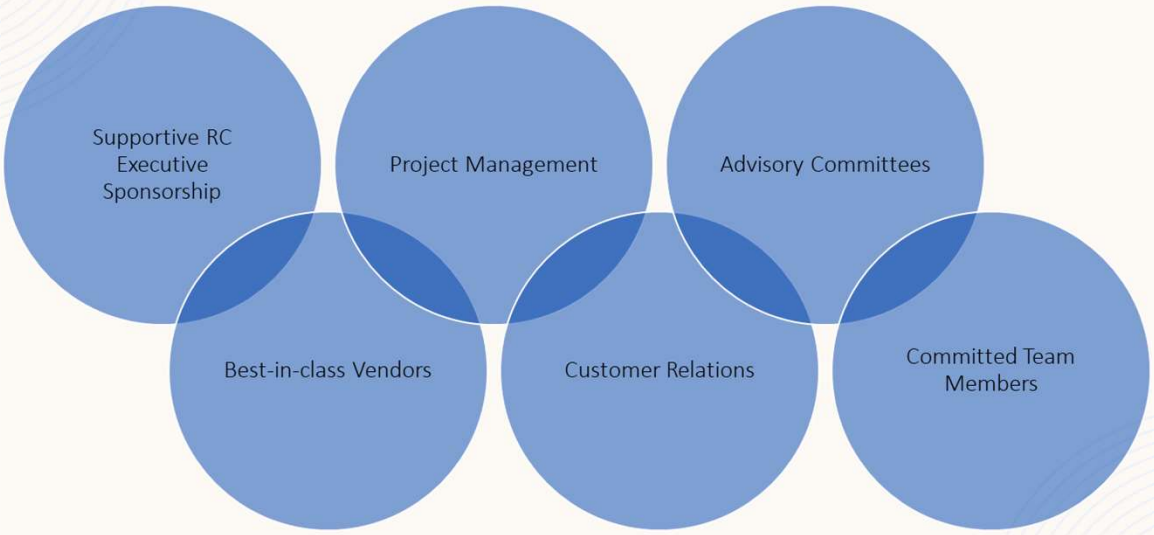

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Team Engagement

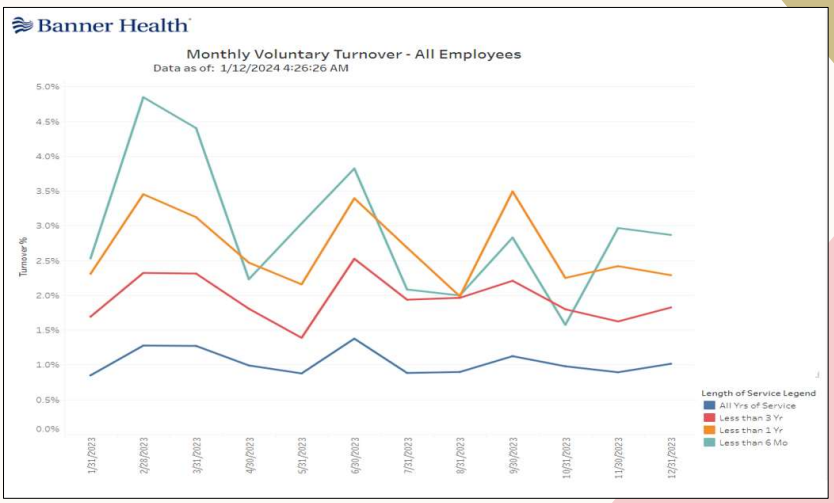
Advanced Learning

Collaboration

CURRENT STATE

- Dedicated training areas and equipment
- Centralized
- One-stop-shop within our Banner owned LMS
- Servicing more customers with the same resources
- Reduced silos across RC
- Interactive tools
- Surveys
- Chain of Command
- Multiple forms of educational content
- Retention focused education
- Reinforcement program

2023 RETENTION RESULTS



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THANK YOU!

Banner Health

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