Phone Improvement Plan: One Voice

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Who is IHA?

IHA is one of the best and largest multi-specialty groups in Michigan. IHA employs more than 1,320 staff members which includes 368 providers across 41 practices in southeastern Michigan.

IHA provides high quality medical care and excellent service to more than 359,000 active patients. Recognized as one of Michigan's top performing medical groups, IHA also ranks in the top quartile for patient satisfaction nationally.

IHA Phone Improvement Plan

- Live answer by 4th ring
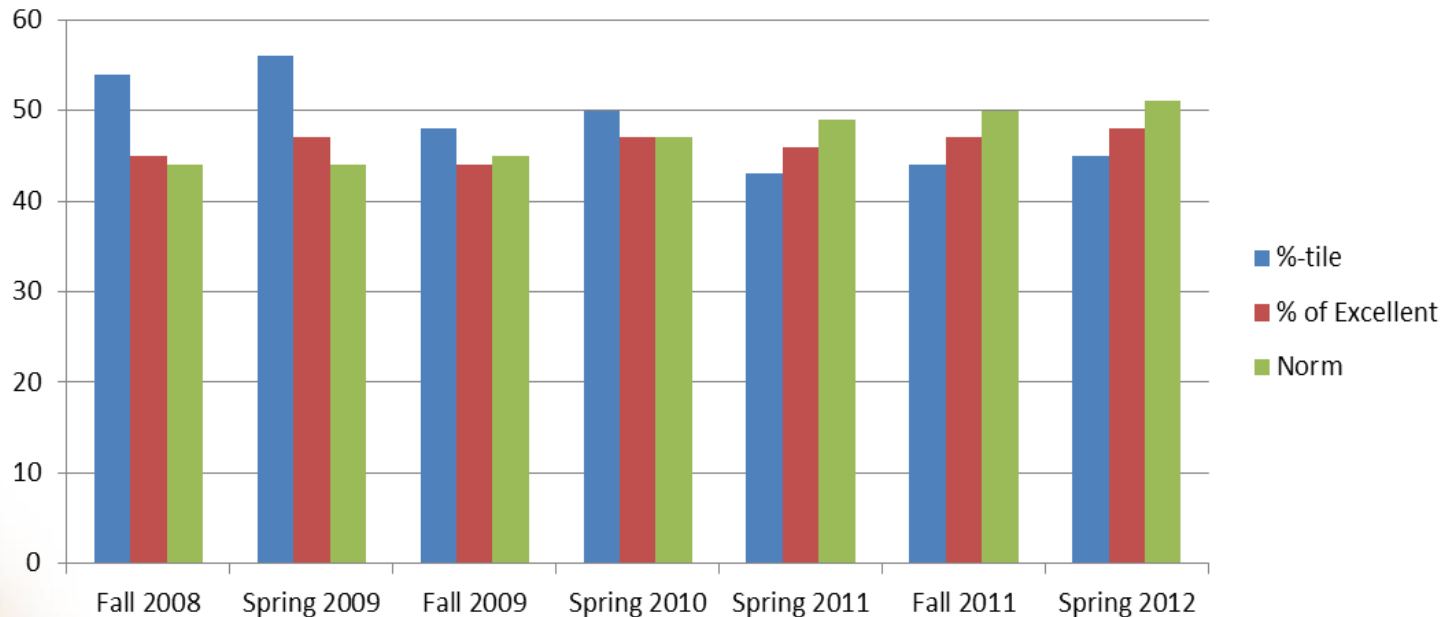
- Can you hear me smile?

- One voice, reduced message

Why Improve Our Phones?

• Patient Satisfaction Surveys

• Testimonials
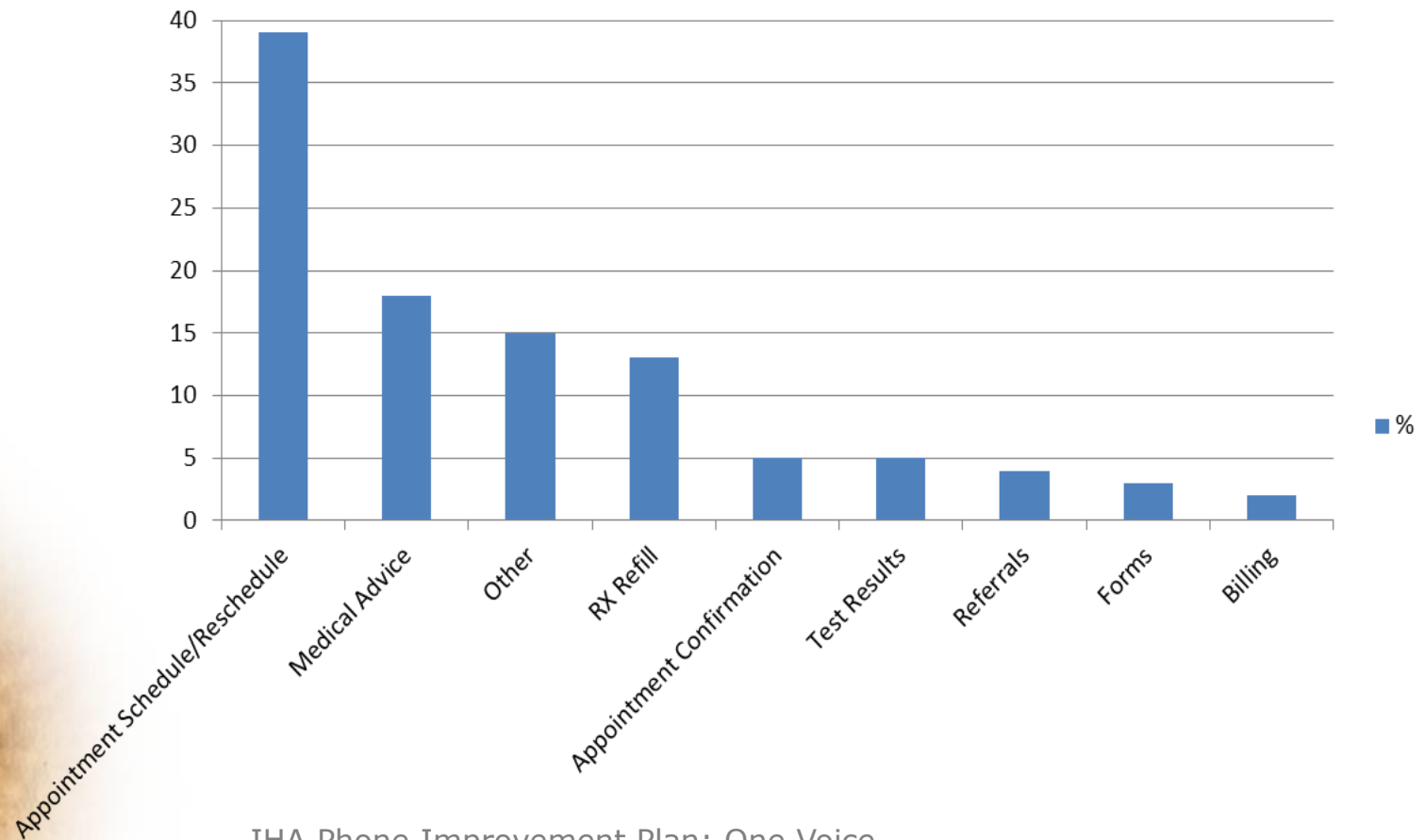
• Provider and Staff Satisfaction

Why Improve Our Phones?

IHA has performed below the AMGA norm since Fall 2009 for the question: "Getting Through the Office by Phone"

Why People Call

70% of calls related to appointment scheduling, medical advice & prescription refills

Why Improve Phone Testimonials:

- Three attempts to contact office, had wait times in excess of 15 minutes she was calling as follow up to a letter she rec'd from us, uncertain of its meaning.
- On hold over 15 minutes
- On hold 40 minutes
- Hold / had abandoned a call prior wk
- 40 mins waiting on nurse then abandoned
- I have been waiting for over 15 min for someone to answer
- Reception staff express that patients get very frustrated with the wait time that they experience when holding to make an appointment.

Steps Towards Improvement

- Division Head Approval
- Formed Improvement groups for Practices and Central
- Establish Pilot Practices
- Develop work plans
- Developed tools
- Rolled out at All PM meetings and others
- Installed Shortel at all practices possible

Phone Improvement Teams

- ## Practice Pilots
  - Practice from each Division

- ## Central
  - Marketing, IT, Division Directors, Operations, Call Center

Further Phone Updates

- Set all systems to 4 rings, and at the end of the 4th ring move call to phone tree options as diagramed

- Set all phone systems to "simultaneous" answer

- Set a "wrap-up" time of 5 seconds to all "Live Answer Workgroups"

Tools

- Developed centralized automated Shortel phone reports

- Phone Improvement Tool Kit

- Capacity and Demand tracking to assess staffing models

- Variance reports

- Standardized "Phone Tree Flow" and prompts

Phone Improvement Toolkit (sample)

- Improve Phone Setup:
  - Standardize system setup
  - Create shared teams for high call volumes
- Improve Customer Service:
  - Develop scripts
  - Monitor staff on phone and coach
- Reduce Call Demand:
  - All patients seen leave with next appointment
  - Encourage NextMD usage
- Match Capacity and Demand

How to Reduce Phone Calls, Examples:

1. Cross trained staff
2. End of visit checklist via MA
3. Take care of call on the 1st call completely
4. Open schedules far in advance so don't have to call back
5. Phone scripting
6. Customer Service Training
7. Utilize Patient Portal

Phone Tree Flow

"Thank you for calling <u>Practice Name.</u> Your call may be recorded for quality and training purposes"

Then call goes to AVAILABLE agent within LiveAnswer Workgroup

only if all WorkGroup agents are busy does caller get following messages.

"If this is an emergency, please hang up and call 911.
The office is currently experiencing high call volume.
If you are calling to schedule or cancel an appointment or need information about a referral, please stay on the line or"

If you are calling about a prescription refill please **press 1**
If you have a clinical question please **press 2**
For pre-recorded information about our location, fax number and office hours, please **press 3**
If you are calling from a hospital or doctor's office, please **press 4**

<u>On-Hold messages</u>

30 seconds   "All our representatives are assisting other patients at this time. Please remain on the line and the next available representative will be with you shortly."

60 seconds   "have you heard about NextMD, IHA's online portal for scheduling appointments, prescription refills, lab results or to view your account? Request an access token during your next visit and begin using NextMD!"
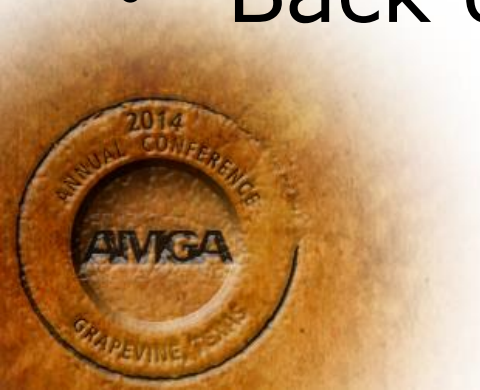
IHA Phone Improvement Plan: One Voice   REPEAT

Staff Performance Scorecard

STAFF PERFORMANCE SCORECARD

SCORE SYSTEM: Yes = 1   No = 0

STAFF MEMBER:

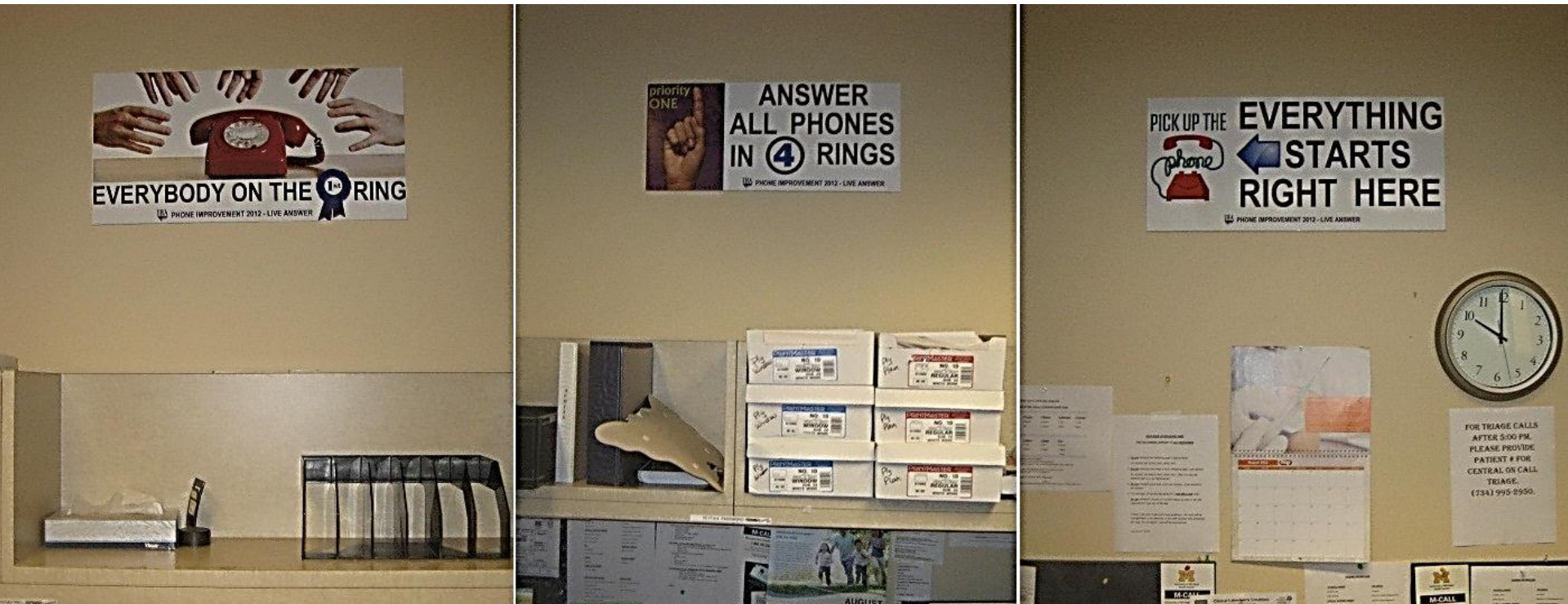| PHONE CALL AUDIT	1	2	3	4	5
DATE OF CALL					
TIME OF CALL					
G GREET CUSTOMER : Did staff member introduce themselves?					
V VALUE CUSTOMER : did staff member thank them for calling?					
A ASK HOW TO HELP : Did staff member ask "How may I assist you"?					
L LISTEN TO CUSTOMER: Did staff member repeat patient request back to them?					
H HELP CUSTOMER : Did staff member ask "Is there anything else I can help you with"?					
I INVITE CUSTOMER : Did staff member invite patient to call back if they had any additional questions?					
Did staff member use three (3) patient identifiers ?					
Did staff member demonstrate proper hold techinque? (If patient was not placed on hold enter 1)					
Total Score	0%	0%	0%	0%	0%	0%

Customer Service Tools

- "Can you hear me smile" mirror

- Internal office phone support posters

- "GVALHI" reinforcement

- "Back of Door" signs

Staff Awareness

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Bring "GVALHI" to Life Every Day

One way to demonstrate how much we value our "Customer" relationships, whether it is in person or over the phone, is to use one of the most important tools taught during **The Customer** training program. "GVALHI"!

- **Greet:** Greet and serve by providing eye contact and undivided attention!
- **Value:** Values customers' significance and relationship to one's job!
- **Asks:** Asks appropriate questions to fully understand customers' needs!
- **Listens:** Listens attentively, non-defensively and without interrupting customers!
- **Helps**: Helps others by taking ownership, following through and going the extra mile!
- **Invites**: Invites customers by appropriately encouraging future contact!
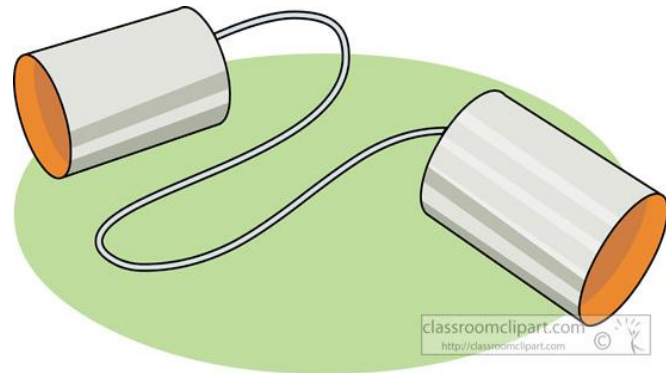
Make the most of all your professional relationships, especially the one with our patients.

As you strive to answer ALL CALLS LIVE in your office, remember three easy steps: think GVALHI, use that mirror, and let everyone HEAR YOUR SMILE!!!

Phone Improvement Goals

- Short Term = 80% Live Answer

- Long Term = 100% Live Answer

Goals

- Reduce phone call volume
  - NextMD, scripting, patient education, handling calls with first touch, end of visit checklist, med reconciliation, access

  - Each office looking at their highest reason for calls

  - Compare volume of calls

Goals

- Answer all calls live by 4th ring
  - Eliminating the phone tree

  - Join forces with another site to share call volume

  - Create an overflow workgroup

Goals

- Improve the "Getting Through the Office by Phone" question on survey
  - Increase percent of excellent over prior survey

  - Remain above the AMGA norm

Major Accomplishments

- Testimonials
- Standardized "Phone Tree" to 4 main options
- All practice's "Same Message" setup
- Extension established for practices to forward a patient to Central Billing with live answering
- Central main line answered live and/or Central Directory improved

Successful Testimonials

- A mom called today and said very seriously that she thought there was something wrong with our phones because when she called she got a nurse. We advised her that this was new and she responded "Oh, that is wonderful."

- Patient at checkout stated "When I called to schedule my appointment, someone answered right away. This is a great improvement and I love it!"

- Staff members that answer the phones state that patients are very surprised when they get a live person (almost caught off guard) when they are expecting a voice prompt system that they go through to get their medications refilled and seem extremely appreciative.

Successful Testimonials, cont.

- Keep up the good work!
- I've noticed the wait time is getting much better!
- Patient love that the call is handled appropriately the first time around – less phone tag
- My staff actually thought that we were no longer doing the phone pilot with Hogback because we weren't receiving as may calls – great job Anne and her team for all their efforts!
- Our office average for each call is handled in 3 minutes and 15 seconds, and average hold time for patients is 15 seconds.

Answering Live with Phone Tree

- At the beginning less than 2% answered live

- Today 61% of our sites answer live 80% or greater of all incoming calls
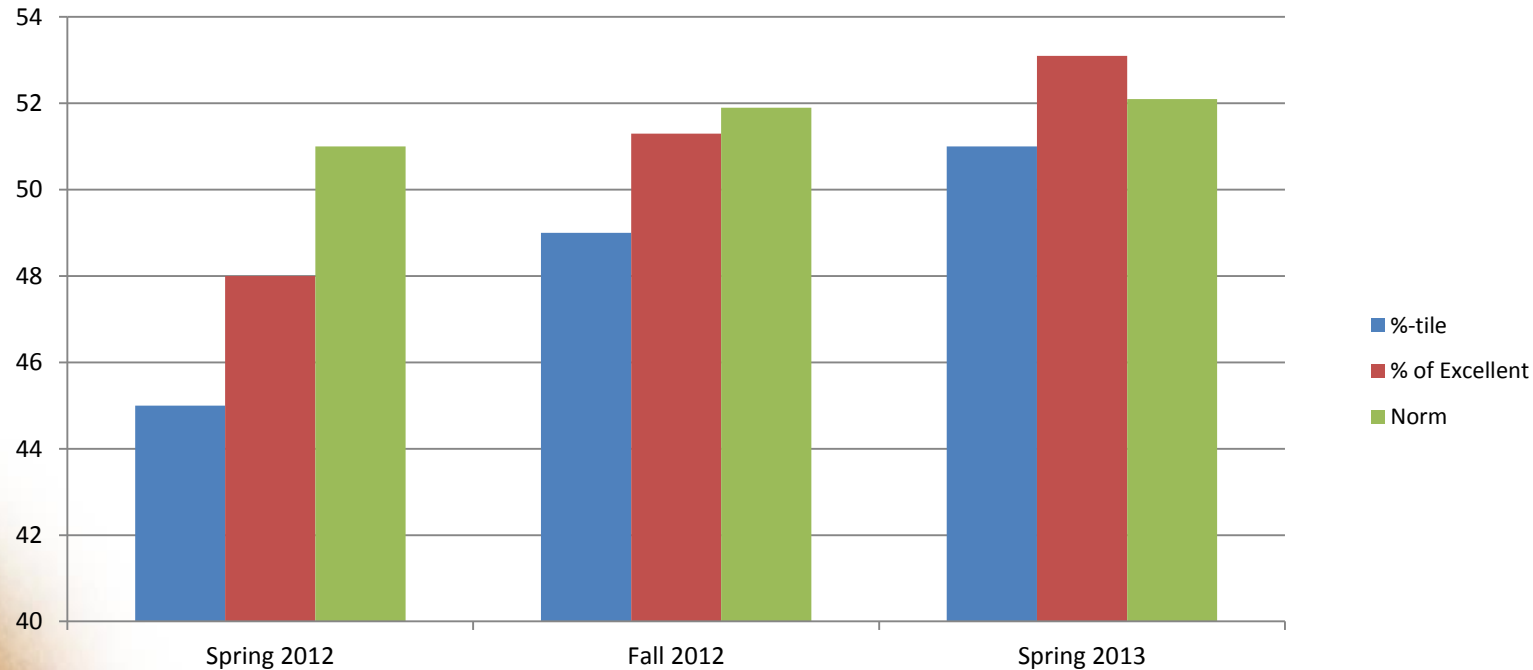
Patient Satisfaction Survey Results

- Improved the "Getting Through the Office by Phone" question from 48.00% (Spring 2012) to 53.10% (Spring 2013)

Patient Satisfaction Survey Results

In Spring 2013 IHA performed above the AMGA norm for the question "Getting Through the Office by Phone"

Practice Success Example

Number of Live Calls:

- Daily Average of Incoming Calls: 350
  - Varies from 600 calls down to 200 calls daily

- Weekly Average Incoming Calls: 1,700

- Highest Weekly Phone Call Volume: 2,120
  - Since 2012

Practice Success Example

The following results achieved since switching to live phone answering in September 2012:

- We answer 95%* of all incoming calls
- Answer within 20 seconds: 93%   Target: 80%
- Average hold time: 0:10   Target: 2:00
- Average connect time: 2:40   Target: 3:00
- Abandoned calls: 2%   Target: 5%

*Averages based on 20 weeks of data

Practice Success Example

Patient Satisfaction Results:

Q3. Getting through office by phone recent results:

Excellent	Very Good	Good	Fair	Poor
43%	27%	22%	7%	1%
55%	27%	15%	3%	0%

Practice Success Example

Outcomes:

- Patients are happier with the personal service
- Reception staff enjoy the challenge and the competition of who can answer the calls the quickest
- Nurses say there are less calls that come to them incorrectly via queue because these calls are now handled by the receptionist staff

Questions?