NAVIGATING THROUGH COMPLEXITY: HOW BANNER HEALTH TRANSFORMED OUR PATIENT ACCESS

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Objectives

• Overview of Banner Health’s Journey to Modernization
• Identify the People, Process, and Technology improvements made
• Walk through the Culture shift in Patient Access
• Share results and takeaways of the Modernization change for our Staff & Patients
Banner Health Overview

$9.4B
In revenue in 2019

$838.9M
In community benefits, including $79 million in charity

AA-
Bond rating

52K+
Total Banner team members

National
Providing services in AZ, CA, CO, NE, NV and WY
Our portfolio of services

**Insurance**
- Banner Network Colorado
- Banner Health Network
- University of Arizona Health Plans
- Banner | Aetna
- Medicare Advantage Plans

**Ambulatory**
- Urgent Care
- Ambulatory Surgery Centers
- Specialty Care
- Primary Care
- Occupational Health
- Cancer Centers
- Imaging Centers

**Acute**
- Academic Medical Centers
- Urban Hospitals
- Rural Hospitals
- Children’s Medical Center
- Behavior Health Hospital
- Heart Hospital

**Post-Acute**
- Inpatient/Outpatient Rehabilitation
- Skilled Nursing Facility
- Home Health
- Hospice and Palliative Care
- Home Infusion
- Home Medical Equipment

**Services**
- Pharmacy Services
- Lab Services
- Telehealth
<table>
<thead>
<tr>
<th>Category</th>
<th>Count</th>
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<tbody>
<tr>
<td>Covered Lives</td>
<td>948,361</td>
</tr>
<tr>
<td>Clinic Visits</td>
<td>5,383,150</td>
</tr>
<tr>
<td>Outpatient Visits</td>
<td>1,713,807</td>
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<tr>
<td>ED Visits</td>
<td>1,004,288</td>
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<tr>
<td>Urgent Care Visits</td>
<td>608,114</td>
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<tr>
<td>Admits</td>
<td>250,952</td>
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<tr>
<td>Observation Cases</td>
<td>117,152</td>
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<tr>
<td>Home Health Visits</td>
<td>220,888</td>
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<tr>
<td>Surgeries</td>
<td>159,358</td>
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<tr>
<td>Deliveries</td>
<td>33,966</td>
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Banner Health’s RC Journey to Modernization

The Big Picture
Primary initiative for all of RC: Front, Middle & Back- Modernization and Bridge

The Why
- Patient Financial Experience Focus
- Physician Satisfaction
- Preparation for new E.H.R
- Significant Revenue Lift and ROI

The What
- Self-Pay Conversions; Enhanced Pt Financial Experience; Front End Workflow/Centralized FC
- Charge Capture; contract mgt; Rev Integrity expansion; Denial Prevention
- Cash Acceleration; back-end workflow; centralized analytics

The How
- Focused Project Teams
- Innovative and Collaborative partnerships with new Vendors
- Corporate Communication and Marketing Strategy
Modernization Lift

Cumulative Project Benefit 2018 - Dec 2020 $743M before expense
$535.1M Net Revenue Lift + 208.3M Cash Acceleration – $52.6M Expenses = $690.7M

Interim “Bridge” Plan (2018-2020)
• Modernize Analytics and Workflow Tools
• Expand Revenue Integrity
• Improvements for Patient Engagement
• Improvements for Physician Stratification

Center Implementation (2019-2024)
• Pilot Cerner Millennium
• Implement Cerner Millennium
• Decouple Bridge Applications

Estimated Benefit Opportunity
Net Revenue Lift
• Potential Annual run-rate:
  $200M/Pre-Cerner
  $228M/Post-Cerner
• 7-year project total: $1.1B

Cost Savings
• Annual run-rate: $21M
• 5-year project total: $79M
• Cash Acceleration: $288M

Estimated Costs and Return
One-time-investment: $81.5M
• Bridge: $21.5M
• Cerner Millennium Implementation: $60M

Recurring costs (7-Yr total): $105.4M
• Bridge: $89.6M
• Cerner Millennium Implementation: $15.8M
• 7-Year ROI: 14:1

Estimated Implementation Timeline

2018 2019 2020 2021 2022 2023 2024

Modernization Start
Bridge Plan Implemented
Cerner Pilot
Cerner Implementation
Strategy:
Getting it Right, at the Right time, Every time

1st time Accuracy is the Key

The Right Tools at the Right Time

Positive Consistent Patient Experiences Every Time

Investing in our team – developing owners
People

Organization Structure Re-Alignment
- Standardized Structure
- Job Description Updates
- Pre-Service Center Centralization
- Education & Quality Team Expansion
- Aligning both Acute and Ambulatory Teams
People

Transforming the Culture

• Listening to Staff concerns and ideas
• Shifting department priorities
  *What Does and Doesn’t fit into the Patient Experience*
• Employee Engagement Committee
• Communications Team
  *Standard Messaging*
• Newsletters
• Yammer
Process & Technology

Goal was to move from a POS based model to a patient centric model empowering our teams to financially secure Sofia’s accounts.

Vendor partnerships that work together to create a single solution for Banner PAS.

Implementation of 3 key pieces of integrated technology that drives process:
  - Experian
  - Curae
  - Flywire
Technology

Experian
- Address Verification
- Premium Eligibility/benefits
- Coverage Discovery
- Patient Estimation
- Shopper/Self Serve Estimates
- RQA
- ABN
- Power Reporting

Curae
- Banner Branded Patient Financing

Flywire
- POS Collection Tool
- Up-Front Payment Plan Set-Up on Estimated Balances
- Self Serve Portal for financing, payments and payment plans
- Statement Vendor
Banner Project Model

Project Management
• Dedicated internal project team with specific ownership and roles
• Partnership with consultant PM and Vendors

Testing
• Banner testing plan
• Developed team from high performing Subject Matter Experts (SMEs)
• Detailed issue resolution strategy
Training Strategy & Go-Live

Training

Vendor “out of the box” training went out the window

Assigned education resources to each project for focused training plan that incorporated Banner specific workflows

Identified high performing PAS reps/leadership representation to become SMEs for Train the Trainer.
  • Targeted Training required in order to perform as a SME for the project

Formalized Training initially in-person then moved to virtual

Go-Live Planning

Go-Live plan – having vendor partner available and engaged as support is critical

Organized support model covering all shifts/departments for escalation of issues

Command Center: Vendor, Banner IT, Project Leads, Project Manager, Project Sponsor, Education Support

Open Bridge Line at go-live and then twice daily check-in calls with all sites that went live
Excitement surrounding go-lives

Leadership town halls

Building up anticipation: on-going communications campaign

Corporate communications

Test team (their peers) advertised what was to come

Early Adopters

Video creation of favorite things that we shared via Yammer

Success Stories

Smoothest Go live in Banner history

Ability to manage multiple go lives concurrently

Staff buy in and usage

Billing Office Access to Tools

Financing Option Surgical Patient
PAS Modernization Impact to Date

- Patient Financing
- Patient Payments
- PAS Workflow Tool
- Additional Impact
Patient Financing

Banner Health – CURAE LTD

- 9,270 Applications
- 4,679 Approvals
- 50% Approval Rate
- Average Initial Transaction Size $2,212
- $28.2M in Approved
- $9.62M Transactions
- Average Approved Credit Limit $6,027
POS Collections did decrease from 2019 to 2020 due to global pandemic COVID related illness / Tele-health visits

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<thead>
<tr>
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<th>2019</th>
<th>2020</th>
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<tbody>
<tr>
<td>Acute Total</td>
<td>$110,727,884</td>
<td>$84,136,597</td>
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<tr>
<td>Ambulatory Total</td>
<td>$43,796,212</td>
<td>$43,146,136</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>$154,524,096</strong></td>
<td><strong>$127,282,733</strong></td>
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**Total Dollars Financially Secured**

<table>
<thead>
<tr>
<th>Total POS Collections</th>
<th>$127,282,733</th>
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</thead>
<tbody>
<tr>
<td>ePlans Established</td>
<td>$9,955,053</td>
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<tr>
<td><strong>Total Dollars Financially Secured</strong></td>
<td><strong>$137,237,786</strong></td>
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</table>
Final pass Accuracy increased 8% across both acute & ambulatory combined in 2020

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<thead>
<tr>
<th></th>
<th>Acute: Dec</th>
<th>Ambulatory: Dec</th>
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</thead>
<tbody>
<tr>
<td>First Pass Accuracy</td>
<td>86.58%</td>
<td>85.81%</td>
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<tr>
<td>Final Pass Accuracy</td>
<td>97.17%</td>
<td>89.50%</td>
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PAS Workflow Tool - Experian

Decrease in eligibility initial denials

2019 - 2020 Eligibility Initial Denials

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<thead>
<tr>
<th></th>
<th>Q1 2019</th>
<th>Q2 2019</th>
<th>Q3 2019</th>
<th>Q4 2019</th>
<th>Q1 2020</th>
<th>Q2 2020</th>
<th>Q3 2020</th>
<th>Q4 2020</th>
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<tr>
<td>Series1</td>
<td>$27,261,157</td>
<td>$23,867,348</td>
<td>$32,252,105</td>
<td>$33,012,654</td>
<td>$30,716,258</td>
<td>$15,531,250</td>
<td>$11,939,543</td>
<td>$19,124,071</td>
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</tbody>
</table>

$- $5,000,000 $10,000,000 $15,000,000 $20,000,000 $25,000,000 $30,000,000 $35,000,000

The NAHAM Online

VIRTUAL CONFERENCE // MAY 12-14, 2021
$13,722,204
Coverage Discovery ROI
Average 25% Find Rate

24.34%
Of all Banner accounts have an estimate generated / delivered
Cost Savings, Transparency, and Staff Satisfaction

- 74.3 FTE Savings
- Power Reporting
- Single Sign-On
Sofia

Pre-Modernization

- Disparate systems used by PAS across acute & ambulatory
- Limited financial counseling options
- Longer registration times
- Billing not timely due to registration quality

Post-Modernization

- Same solutions used across enterprise with easy visibility for all lines of business
- Financial Counseling options available:
  - Financing
  - Pre-service payment plans
  - card saved on file
- Introduction of Express Registration
- EOB is received more timely
Key Takeaways

1. If organization spans multiple states re-validate information
2. Need dedicated testing resources
3. Timely issue resolution
4. Dedicated PM support
5. Continuity across the players
6. Bring in who will support products moving forward early in the design phase
Next Steps

- Registration Accelerator
- Integrated Revenue Cycle Education
  - Focused E-Learning and WFH Support
  - Career development and Certifications
- Patient Balance Management Transformation
- Cerner Millennium Transformation
- Optimization of Current tools and workflows
- Additional centralization options for PAS
Questions