Building a Customer Service Focused
Referral Process – It all Starts Here!

Simione
HEALTHCARE CONSULTANTS
The way is in sight~

Learning Objectives

- Define a strategy for maintaining accuracy in the referral process and meeting all regulatory requirements   in the referral process
- Define a strategy to maintain a sense of urgency in the referral process and assist families with barriers to care
- Execute an agency wide customer service strategy and monitor ongoing progress towards established goals in the referral process

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What is required in the referral process from a regulatory standpoint?

✓ Order for care
✓ Certificate of Terminal Illness
✓ Consents, legal documents
✓ What is new?

What is required in the referral process for quality care?

✓ History and Physical
✓ Medications
✓ Equipment needs
✓ Setting patient and family expectations

What is required in the referral process from a financial perspective?

✓ Insurance verification/ pre-certification
✓ Face to Face requirements
✓ Correct information on consents
✓ What is new?

What does "Urgency" mean?

- Determine current response time from referral to first visit
- Consumer callers – getting to the first visit
- Determining what is important to all referral sources
- Scheduling visits – involving the team in improving the response time
- Maintaining the sense of urgency when following up on pending admissions

Metrics

- Track time from referral to first visit

- Best practice

- ***Quality begins when the phone rings!***

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Patient and Family Barriers

- How do we handle barriers to care in the referral process?
- Define common barriers to care
- Are there barriers to care from the referral community?

What does it sound like?

- Overcoming barriers – Examples
  - Not ready yet
  - Not until next week
  - Don't say hospice
  - Wait until the entire family is present
- Make it easy for your referral partner
  - Are you the easiest agency to work with?
  - Responsiveness

Who Are Our Customers?

- Referral partners
- Consumer callers
  - Owning their health care decisions
- Professional callers
- Internal customers

Defining Customer Service
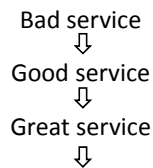
Bad service
⇩
Good service
⇩
Great service
⇩
LEGENDARY CUSTOMER SERVICE

Poor Customer Service

- Data dump approach
  - "we have"
  - all about us
- Inquisition approach
  - screening
- Make them jump through hoops approach
  - "can you fax us the H&P and a face sheet?"
- Not holding on to the ball

Legendary Customer Service

- Defining Customer Service
- Its about them not about us
- Focus on the patient and family
  – Fundamental change
  – What hospice is & who qualifies/program focus
  – How we help patients & families/customer focus
- Helping the caller
- Hold on to that ball!

What to do first?

- Set goals and timelines for improving both accuracy and response time
- Evaluating effectiveness of current staff and the staffing model
- Evaluate current process for efficient use of technology
- Collecting data – performing a gap analysis

Gap Analysis

- Evaluating your customer service level
- People
  – How many?
  – Clinical vs. non-clinical
- Process
  – Consistency, accuracy
- Metrics
  – Conversion rate, productivity, surveys

People

- Customer Service experts
- What's the right number?
- The right seat on the bus
  – Maximizing strengths
- Coaching staff for ongoing improvement
  – How much time are you spending coaching?
- Don't forget your field staff
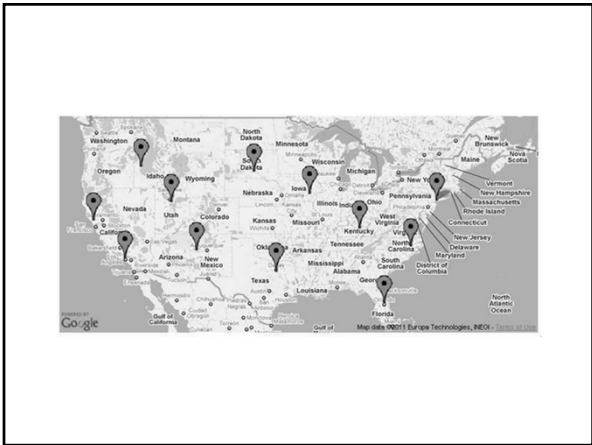 – Admission RNs, Liaisons

Mystery Calls

- The importance of mystery calls
- Using mystery calls
  – Coaching
 – Tracking progress
  – Holding staff accountable

Metrics

- Conversion rate
- Productivity
- Call reports
  – Volume, abandoned calls, hold time
- ADC
- LOS
- Customer Satisfaction Surveys

Developing Your Strategy

- Monitoring and evaluating your progress
  - Inspect what you expect
- Policies and procedures
- Resource manual
- Complex case protocol
- Closing the loop
- Culture – Everyone included!

Developing Your Team

- Hiring the right staff
  - Candidate profile tests
- Orientation and training
  - Field
  - Office
- Ongoing coaching and support
- Motivating your team
  - Incentives

Monitoring for success

- Monitoring accuracy in the information – implementing self-checks and review processes
- Measuring against agency and industry benchmarks
- Celebrating success
- Internal staff surveys

"It's Different Here…"

- Differences between markets
  - Metro vs. rural communities
  - Medical community
- Referral volume
- Technology

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THE BEST PRACTICES ARE THE SAME

Remember…

- Legendary Customer Service is a culture
  - Top down messaging
- The right people
  - Hiring and training
- Define your strategy and your goals
- Measure your success
- *Quality begins when the phone rings!*

Questions?
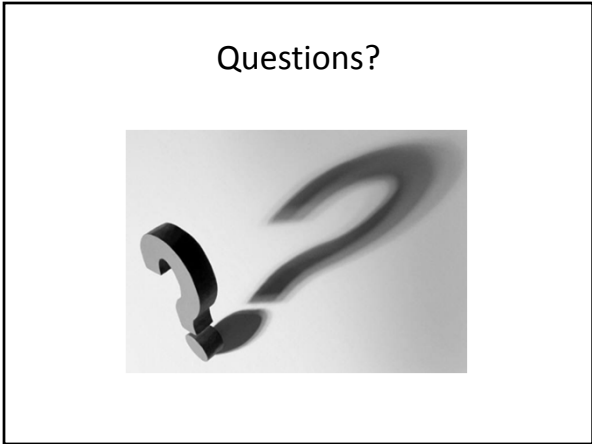
Katherine Northcutt, RN
Simione Healthcare Consultants, LLC
678-575-7668
800.949.0388

knorthcutt@simione.com