University of Pittsburgh Medical Center: Redesigning ROI in Physician Offices

At a Glance

University of Pittsburgh Medical Center
Pittsburgh, Pennsylvania

Facility:
- More than 500 physicians' offices and outpatient sites
- Employs nearly 3,600 physicians
- More than 20 academic, community and specialty hospitals
- Employs more than 60,000 people

Challenges:
- Decentralization
- Breaches
- Rejection letters of authorizations
- Slow turnaround times
- Unsatisfactory customer service
- Managing patient and client expectations

Solution: CIOX Health ROI
- Streamlined ROI process without workflow interruption
- Performed breach risk assessment
- Ongoing training on completion of authorization forms
- Standardized processes to ensure timeliness
- Designated account managers
- On-site quality assurance associate

Benefits
- Compliance goals met
- Complete audit trail of requests
- Accuracy and security of ROI process
- Communications routed to appropriate departments
- Approved authorizations without patients repeating forms
- Increased level of service, productivity and high satisfaction

Background

The University of Pittsburgh Medical Center (UPMC) was an early adopter of electronic health records (EHR) and the interoperability solutions that tie them together. Its clinical and technological capabilities have attracted such technology partners as General Electric, IBM and Oracle. UPMC operates more than 20 academic, community, and specialty hospitals, more than 500 doctors' offices and outpatient sites, employs nearly 3,600 physicians, and offers an array of rehabilitation, retirement, and long-term care facilities. UPMC is the largest non-governmental employer in Pennsylvania, with more than 60,000 employees. With renowned centers of excellence in transplantation, cancer, neurosurgery, psychiatry, rehabilitation, geriatrics, and women's health, it ranked No. 13 in the nation on the U.S. News & World Report 2015-2016 Honor Roll of America's Best Hospitals – with 15 adult specialties ranked. More than a dozen of UPMC's hospitals are at the highest levels of EHR adoption, as are its outpatient locations, enhancing the quality and safety of patient care.

Challenges

UPMC released both paper and electronic health records on the same patient at many of its physician offices. During its ongoing transition from paper to electronic health records UPMC faced challenges to its release of information

(ROI) process. Its ROI process was decentralized and there was a lack of standardization and organization. Additionally, electronic information came from multiple sources, including other EpicCare sites via the EpicCare tool, UPMC hospitals interface, outside labs, and other healthcare facilities. Initially, physician offices were given the option to perform ROI in the office if physicians preferred. Otherwise, previously selected ROI vendors continued to provide service until UPMC moved to a small local preferred vendor.

In 2010, UPMC's local ROI vendor was sold to a larger company. The physician offices began experiencing challenges with breaches, rejection letters of authorization, slow turnaround times, unsatisfactory customer service, and managing patient and client expectations. UPMC also encountered problems with not being able to release records due to patient errors in completing authorizations. Rejections of authorizations delayed the ROI process and resulted in dissatisfaction from customers both patients and the requesters of the information. With an influx of record requests resulting in increased errors and breaches, UPMC was hesitant to expand its health system to include more physician offices. UPMC physician offices were challenged with slow turnaround times as office managers were faced with large volumes of ROI request phone calls. Calls were directed to the general customer service line and did not receive the appropriate attention which resulted in sub-par customer service experiences and unhappy, dissatisfied patients. Additionally, UPMC faced difficulties in managing patient and client expectations and needed on-site representative from its ROI vendor to assist. In 2012, CIOX Health acquired UPMC's ROI vendor and immediately began working to improve the experiences of UPMC and its customers.

> "It is a pleasure to be in a partnership with a company that makes the needs of the customer a top priority. One that is committed to releasing the right information, on the right patient, at the right time, to the right requester."
>
> *AnnE Rice, MS, RHIA*
> *Senior Director, HIM Physician Services Division*

Solution: CIOX Health ROI

The improvement process began by defining work that could be done remotely, identifying what functions had to be manually performed, and processing both paper and electronic requests. CIOX Health presented UPMC with CIOX Health ROI, a customizable, scalable and adaptable technology-based solution to meet its unique challenges. With the ROI solution, UPMC enabled the release of information for its existing EHR system without interrupting the existing workflow process. CIOX Health streamlined UPMC's ROI process by making the management and tracking of medical records automated, secure and cost effective. On-site, fully-trained HIPAA-certified client service representatives were provided to perform HIM responsibilities and ROI functions, including responding to questions and issues concerning ROI. CIOX Health associates were monitored by an on-site CIOX Health representative relieving UPMC from additional managerial tasks.

Working to streamline the ROI process, CIOX Health developed tools for standardization and documentation addressing specific challenges with breaches and other bottlenecks. CIOX Health presented a process which included alerting UPMC whenever there was a breach, completing a risk assessment to send to UPMC Compliance and sending a letter to the patient whose information was breached. To address the challenges resulting from rejection of authorization letters, education was provided to both UPMC and CIOX Health staff on the policies concerning valid authorizations. Additionally, forms were developed to help patients accurately complete medical record release authorizations and provided ongoing training to UPMC on the accurate completion of authorization forms. Standard processes were developed to ensure requests were fulfilled in a timely fashion, improving turnaround times and eradicating the backlog of calls. Previous requests were checked to ensure they were fulfilled within specified timeframes. To address the customer service challenges and expedite calls, CIOX Health provided UPMC with a phone line dedicated to ROI request calls that was answered by designated account managers. In response to UPMC's request for an on-site person to

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CIOX Health
925 North Point Parkway
Suite 350
Alpharetta, GA 30005

770.367.1500
cioxhealth.com

For more information,
please contact:

Cindy Bagley
Sales Support Program Manager
770.754.3262
Cindy.Bagley@cioxhealth.com

manage patient and client expectations, CIOX Health provided an on-site quality assurance (QA) director dedicated to UPMC whose focus is on quality improvement, increasing levels of service and providing a positive experience for patients, clients and staff.

Benefits

Since 2012, UPMC has utilized CIOX Health's streamlined ROI process and advanced technology to transfer medical records, bringing its facility peace of mind throughout the process that compliance goals are met. UPMC was able to scan and email ROI requests to remote offices for daily processing instead of a CIOX Health associate commuting to offices weekly. Not only were turnaround times improved, but patient and client relations improved as well. Additionally, UPMC was able to track ROI requests during any part of the process, electronically document all authorized and non-authorized disclosures, and view a complete audit trail at its convenience. By partnering with CIOX Health, UPMC guaranteed accuracy and security in the ROI process ensuring best practices for breach prevention. With the addition of an on-site QA associate,

> ROI requests moved quickly and efficiently through the process and as a result, UPMC processed nearly 17,000 ROI requests monthly.

questions, issues and comments regarding ROI requests were vetted through QA and then routed to the appropriate department. The QA associate bridged the communication gap resulting in improved efficiencies and a more seamless release of information process. Through the development of tools for authorization forms, UPMC approved authorizations preventing the need for patients to repeat the process due to inaccurate or incomplete information. ROI requests moved quickly and efficiently through the process and as a result, UPMC processed nearly 17,000 ROI requests monthly. CIOX Health helped UPMC increase productivity and improve satisfaction with patients, HIM teams and physician office management and staff. UPMC realized effectiveness while refocusing its staff to revenue generating activities.

UPMC offices that were on Epic for a number of years and no longer needed to copy paper charts were also transitioned to the CIOX Health ROI solution. CIOX Health provided University of Pittsburgh Medical Center with innovative technology and the right tools to drive its ROI success.

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