UCSF’s Digital Patient Experience - Patient Access Suite

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Project Description
UCSF Health’s Digital Patient Experience Initiative is a digital transformation program focused on providing our patients with a modern, delightful user experience in their interactions with us. Our Patient Access Suite addresses the challenge that patients have with scheduling an appointment to see a specialist at UCSF, which is primarily a frustrating manual process handled by fax and telephone calls that often takes several days to complete. The Patient Access Suite provides digital tools to patients and our staff with the goal of same day appointment scheduling.

Project Narrative
Problem/Goals
As an academic medical center that focuses on specialty care, getting an appointment to see a clinician at UCSF is difficult and often frustrating. To get an appointment, the patient’s primary care physician (PCP) must fax a referral to UCSF. That fax is then manually entered into the electronic health record (EHR) system by an access coordinator to create a digital referral record. The access coordinator then calls the patient to get additional information required to schedule an appointment, often playing phone tag over several days before an appointment is finally scheduled.

If all goes well, we are able to hit our goal of scheduling an appointment within 5 days from when the referral record is created. However, that is typically the exception, and often we are unable to hit that 5-day goal given the high demand for UCSF specialists. This leads to patient frustration and frequently results in the patient going elsewhere. Patients with commercial insurance often have the option to go elsewhere, causing an imbalance in our payor mix and negatively affecting our financial performance. In 2018 alone, we estimate that we lost 46,000 referrals due to the inefficiencies in our process.

With the implementation of the full Patient Access Suite, our goal is to schedule the patient the same day we receive the referral. We continually measure the success of the program through scheduling metrics, patient satisfaction, and payor mix.
Solution
The Patient Access Suite is an exemplar of digital transformation that needs to occur in healthcare. We migrated an analog, manual process to an automated, digital solution that improves operational efficiencies as well as improving our patients’ experience. The DPE Patient Access Suite consists of 2 modules: Referrals Automation and Patient Connect. The solutions combine 3rd party commercial components integrated with a custom user interface integrated into our Epic EHR system.

**Patient Access Workflow:**

1. Referrals Automation (RA) expedites referral fax processing by providing our access coordinators a tool for automatically converting faxes into digital referral records directly into the EHR. When faxes are received, RA uses 3rd party OCR technology from Kofax to convert the fax into structured data. Utilizing a custom web user interface launched directly from the EHR, the access coordinator is then able to verify the correctness of the transcribed data, correct if necessary, and then create the digital referral record in the EHR.

2. Once the digital referral record is created, the referral coordinator is able to use Patient Connect (PC) to accelerate the appointment scheduling. PC is launched directly from the EHR as part of the referral coordinator’s workflow. Using PC, the referral coordinator determines what information is needed from the patient and can reach out to the patient via SMS. PC provides a checklist to the referral coordinator to drive readiness for scheduling. If the information needed to schedule an appointment is complete, the referral coordinator can select one or more clinicians for the patient to schedule with based on the patient’s condition(s).

3. PC then calls out to Luma Health, a 3rd party mobile web application, that allows the patient to self-schedule with the clinicians selected by the referral coordinator.
Collaboration
While the Digital Patient Experience Program at UCSF has been led by the Center for Digital Health Innovation, the project teams included other members from different teams across UCSF including Clinical Systems, Information Technology, and the School of Medicine. Furthermore, we worked very closely with our UCSF Health operational partners to gather requirements, improve workflows, and pilot our minimum viable products (MVP), most notably, our business partners in the Patient Access team, the Pediatric Access Center, and Adult Orthopedics. They were willing to innovate with us and provided valuable feedback to continually improve the solutions.

Our strategic direction was set by our Steering Committee consisting of nine executives from the health system. They set our priorities for the issues we needed to address. The Patient Access program also received help from across the UCSF Health organization through a working group of 40+ managers and directors that provided monthly guidance and feedback as we progressed. Finally, we also were guided by our Patient Facing Advisory Committee, a group of UCSF patients who provided candid feedback during our discovery process and critiqued our proposed designs for improving access to UCSF.

Technology
For both Referrals Automation and Patient Connect, we utilized commodity technologies to build and host the solutions. Both are Microsoft ASP.Net web applications using modern JavaScript user interface libraries, i.e. Angular JS and Bootstrap. The solutions are both hosted on AWS, which allowed us to utilize agile DevOps processes to deliver quickly. We made extensive use of Mulesoft Anypoint as our middleware to orchestrate many of the APIs and data interfaces needed by our solutions.

For both modules, a key innovative technology utilized was SMART-on-FHIR, a health interoperability standard created a few years ago that allows externally applications to be seamlessly integrated into the EHR. SMART-on-FHIR combines several standards:

- Substitutable Medical Applications / Reusable Technology (SMART) – allows an external web application to be launched from inside the EHR, passing along the context of the current user and patient record being viewed in the EHR. This allows our solutions to be launched as part of the coordinators’ current workflows within the EHR, making it easy for users to adopt. Any app created with this standard can be reused by any of the major EHR vendors in use today. This allows our solution to be utilized by health systems outside of UCSF.
- OAuth – a standard authentication mechanism that allows a 3rd party application to reuse the user authentication provided by the EHR, i.e. the user doesn’t need to log in again, and the data access security constraints are respected by the 3rd party application.
- FHIR API – a healthcare data interoperability standard that allows consistent retrieval and storage of patient health data across different vendors.
For Referrals Automation, one key challenge we faced was that off-the-shelf OCR libraries are insufficient to deal with the myriad of referral fax formats that come to UCSF. Our solution allows us to create templates for the various referral faxes we receive. The templates define areas on a fax where the OCR engine will translate text and where to map the transcribed data. The template creation is currently manual, but we have established a framework that will allow us to use machine learning for the future. There are currently no commercially available solutions that solve this problem, and it’s one that’s prevalent in healthcare.

For Patient Connect, the key innovations include the incorporation of an automated workflow to facilitate interactions with the patient and the condition-based approach to determine which physicians are recommended to the patient. The checklist and mapping are currently encoded into the solution, and the coordinators have the ability to override the defaults. We have instrumented the app so that in the future, we can use machine learning to automatically predict the clinicians to recommend to the patient based on the contents of the referral and the information we have from the patient.

Measure of Success

- **Increase access center capacity**
  - Reduced processing time per referral by 40%
  - Increased coordinator productivity (Referrals/FTE/Day) by 50%
  - Reduced time spent servicing appointments (Approx. 5 mins saved per Cancellation/ Reschedule)
- **Improve financial performance**
  - Improved contribution margin by shifting payor mix to more sustainable ratio in areas using the new patient access tools (cannot share this data)
- **Improve utilization**
  - Reduced no-shows: For Adult Orthopedics, which has the complete Patient Access Suite implemented, no-show rates were reduced by at least 30%.
  - Canceled appointments are automatically offered to waitlisted patients and 52% of waitlist offers were accepted
- **Improve patient experience**
  - 90% of patients reported a scheduling experience of 8+/10
Transcribed data is displayed next to the fax snippets for easy verification. For each field, the coordinator can decide to either keep the value in the EHR or update it with the value from fax.
Once information is verified, the referral is created in the EHR to prep for scheduling.

**Patient Connect**

Main Referral Coordinator Screen that allows the referral coordinator to

- Collect missing information from patient
- Request the patient to self-schedule their appointment with one or more specialists for their specific condition.
- Request the patient to callback the department