



Patient Outreach Workflows

Marie Polanco, CPC, CPPM, CPB, CRC, NBC-HWC

Practice Administrator

Hodges Family Practice, Inc.



Biography

Marie began her healthcare career as a clinical nurse. She has varied exposure to hospital, home health, and clinical practices. She bridged over to management in a home health environment. She has pursued certification as a Certified Procedural Coder, Certified Practice Manager, and Certified Risk Coder.

She is pursuing a certification in Medical Auditing to educate within her medical practice. She further engages on the patient platform with her Board Certification as a Health and Wellness Coach and Certified Yoga Teacher.

Introduction

Hodges Family Practice, Inc. is an independent primary care practice in Asheboro, NC. It currently employs 5 providers; 2 MDs are bilingual, along with office staff. The practice has adopted a Lifestyle Medicine approach with PAs as clinical educators. This is creating an atmosphere of preventative medicine instead of reactive medicine.





Medicaid Population

Current enrollee population

2200 members

Additional members since 12/2023

1500 members

Payor mix 50% UHC

25% Healthy Blue

25% Other PHP's

Approximately 125 patients Direct Medicaid

50% Population Spanish Speaking



Communication Tools

Bilingual Staff

Phone

Email

Secure Text Messaging


Video Chat

Doxy Me

Phreesia

Updox

Follow My Health Portal- web messaging



Issues faced during the outreach process

- Lack of demographics
- Inaccurate demographics
 - Trust Issues
- Communication – how to reach patient????



Process Discussions

- Suggestions on how to reach a membership of 2200, overcome language barriers, build trust among new members, and seek assistance from payors.
- Create an open-door environment



1st Step

Divide and Conquer

- 5 groups
 - Current active patients
- Current active with additional family members
- New w/available demographics
 - New without demographics
 - Inactive patients




Define communications scripts

- How to word the script?
- What did we want to accomplish?
- Use their payors as the why for the outreach.
- Define all in English and Spanish



Tracking Tool

- CCNC provides Practice Perfect
- Practice Perfect identifies the gaps in care
 - Export to Excel Spreadsheets
- Shared Google Drive updates added
- **Prioritize groups**



The way to get started
is to quit talking and
begin doing.

Walt Disney



Processes

- Bilingual staff assignments
- Use student interns to send communications
- Divide Excel spreadsheets among staff
- Update Practice Perfect with status changes



Roadblocks

- Lack of demographics
- Inaccurate demographics
- Moved to a separate list for future outreach
- Member unwillingness to schedule-enlist payor care management

Summary

The expansion presented the practice with a unique set of issues. How do we utilize the staff most efficiently?

It remains a work in process, but the practice has set the goal of achieving success with outreach in a realistic mindset.

We celebrate the successes and review the failures.





Thank you

Marie Polanco, CPC, CPPM, CPB, CRC, NBC-HWC

mpolanco@hodgesfp.org

(336) 327-6679