



Trinity Health

# Assessing the Effectiveness of Revenue Cycle Training

The Trinity Health Journey

Alabama HFMA Chapter, October 2022



# Learning Objectives

The learning objectives for this facilitated dialogue are:

- Discover more about both Trinity Health and its Enterprise Revenue Cycle Training Team
- Understand Revenue Cycle Training as an enabler of Revenue Cycle Strategy
- Learn how to evaluate the transfer of knowledge process within your organization
- Engage in a dialogue about anything applicable to your Health System

Who	Why	What	How
<ul style="list-style-type: none"><li>• Trinity Health Overview</li><li>• Trinity Health Revenue Excellence</li><li>• Trinity Health Training and Deployment</li></ul>	<ul style="list-style-type: none"><li>• Implementation of a Single-Source EHR</li><li>• Enterprise-wide Consolidation of Patient Business Service Locations</li><li>• Creation of Best-in-Class Performance Management &amp; Support Services Team</li><li>• Pandemic</li></ul>	<ul style="list-style-type: none"><li>• Our Dashboard</li><li>• Transparency</li><li>• Accountability</li><li>• Line of Sight</li><li>• Performance Improvement</li></ul>	<ul style="list-style-type: none"><li>• Likert Scale</li><li>• Kirkpatrick Model</li><li>• Automation</li></ul>



# Who

**\$20.2B**

In Revenue

**25**

States

**1.4M**

Attributed Lives

**\$1.2B**

Community Benefit Ministry

**115K**

Colleagues

**6.8K**

Employed Physicians  
& Clinicians

**25.8K**

Affiliated Physicians

**88**

Hospitals\*

**17**

Clinically Integrated  
Networks

**131**

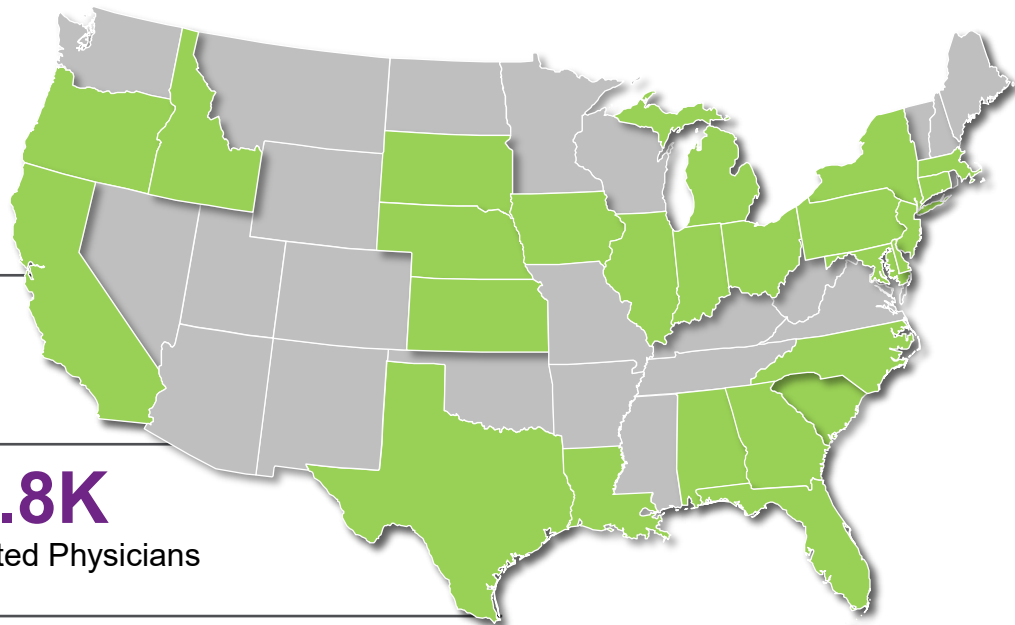
Continuing  
Care Locations\*

**25**

PACE Center  
Locations\*

**125**

Urgent Care  
Locations\*



FY21 data unless noted

Exclusions: Mercy Chicago Hospital transitioned to Insight Chicago (June 2021); Mercy Philadelphia Hospital transitioned to Penn Medicine (March 2021)

\*Owned, managed or in JOAs or JVs

v: 10.25.21





# Who



## Our Mission

We, Trinity Health, serve together in the spirit of the Gospel, as a compassionate and transforming healing presence within our communities.



## Our Core Values

- Reverence
- Commitment to Those Who are Poor
- Safety
- Justice
- Stewardship
- Integrity



## Our Vision

We will be the most trusted health partner for life.



## Our Actions

As a Trinity Health colleague, I will:

- Listen to understand.
- Learn continuously.
- Keep it simple.
- Create Solutions.
- Deliver outstanding service.
- Own and speak up for safety.
- Expect, embrace and initiate change.
- Demonstrate exceptional teamwork.
- Trust and assume goodness of intentions.
- Hold myself and others accountable for results.
- Communicate directly with respect and honesty.
- Serve every person with empathy, dignity and compassion.
- Champion diversity, equity and inclusion.



## Our Promise

We Listen.

We Partner.

We Make it Easy.



# Learning Objectives



*"The training delivery model that this team has created far exceeded my expectations and is viewed as the gold standard by our stakeholders. This model has been stress tested and has evolved over time, positioning our team to be able to train over 7,000 trainees over the last three years and to transition to a full virtual model almost overnight. Their outcomes speak for their self!"*

Christine Aucreman

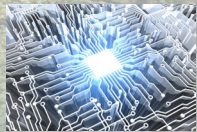
VP, Enterprise Performance Management and Support Services

President- HFMA Central Ohio Chapter





# What



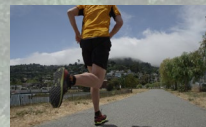
January 2018



February 2019



May 2019



January 2020



March 2020



# What



2023 marks growth into Point of Service Training and Patient Access moving towards our Full Revenue Cycle Vision





# What

2019 Scorecard

Learner Reaction 86%

Trainer Impact 86%

2020 Scorecard

Learner Reaction 90%

Trainer Impact 89%

2021 Scorecard

Learner Reaction 88%

Trainer Impact 89%

2022 Scorecard

Learner Reaction 92%

Trainer Impact 93%

2023 Scorecard

Learner Reaction 93%

Trainer Impact 93%

March 2020







# What

## Training Dashboard 2.0

Landing Pa...

Click on icon to view individual sub-dashboards

Date through last evaluation: 3/15/2022

- Onboarding Evaluations
- TogetherCare Evaluations
- Legacy Evaluations
- Assessments
- Onboarding Evaluations Archived





# How

## Our Experience in Defining the Process

How are you  
going to  
measure?



### Reliability

Consistency of results  
Over time, participants, and  
conditions  
However, reliable does not  
mean valid



### Validity

Measuring accuracy  
Crosschecking information  
Quantitative against  
Qualitative



### Time

Recency impacts results  
Recency improves quality



### Generalizability

How applicable the  
results of our data are  
to achieving our desired  
outcome





# How

## Our Experience in Assessing the Effectiveness of Revenue Cycle Training

Begin with the end in mind by determining your current state- SIPOC



### Process

Knowledge Transfer



### Input

Evaluation data from  
instruments you create  
Assessment data from  
instruments you create- or  
from the HIS System vendor



### Output

End User Ratings  
Scores  
Dashboard



### Supplier

Kirkpatrick Model  
Likert Scale  
Tableau  
HIS Vendor



### Customers

End Users  
Stakeholders





# How

## Our Experience in Assessing the Effectiveness of the Process

The Kirkpatrick Model is an internationally recognized tool for evaluating and analyzing the results of educational, training and learning programs. It consists of four levels of evaluation: Reaction, Learning, Behavior, and Results.







# How

## Our Experience in Defining the Process

What are you going to measure?

Level 4

Level 3

Begin with measuring  
Level 1 and Level 2

The degree of difficulty in determining true causality increases with each level





# How

## Our Experience in developing your Process Inputs

### Measurement Scale

Utilize a 5-point Likert Scale

### Instrument Design

Design survey questions which lead your audience towards a specified level of agreement

Focus on a single construct

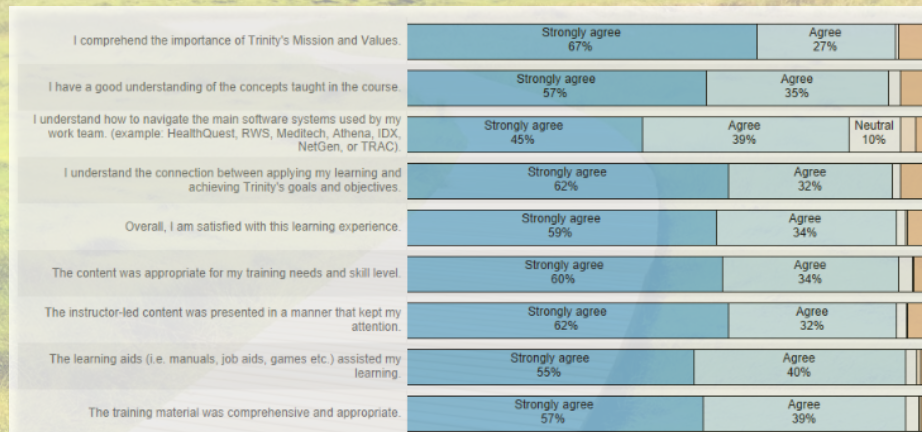
### Data Validation

Utilize both quantitative and qualitative techniques



If you selected disagree or strongly disagree to the above question, please indicate which software you need additional assistance navigating	5/13/2022	Julie Pender	this was a great learning experience
		Pamela Proudfoot	Pamela and Teri Jones explained the systems in a very clear cut way and made me feel welcome
		Stefanie Vincent	NA
		Tim Bright	the trainer only allowed us breaks in 5 min intervals which made a stressful day and overwhelming.

What suggestions do you have to make the learning experience more relevant to your job?	7/29/2022	Richard Hernandez	NONE
	5/20/2022	Pamela Proudfoot	I do not have any, this training experience has already went beyond what I was expecting!
		Patrick Hart	Have more break out sessions/times available for the system learning Epic, in case we need further help on one to one level with the exercises.



Level 1







# How

## Our Experience in developing your Process Inputs

### Measurement Scale

Utilize a 5-point Likert Scale

### Instrument Design

Design survey questions which lead your audience towards a specified level of agreement

Focus on a single construct

### Data Validation

Utilize both quantitative and qualitative techniques



What portion of the training was least effective?	7/29/2022	Richard Hernandez	NONE
	5/20/2022	Pamela Proudfoot	I thought the whole entire training experience was amazing I have never had training like that before!
		Patrick Hart	some days the classes seem too long with doing alot of reading.

What feedback would you provide the instructor?	7/29/2022	Richard Hernandez	NONE
	5/20/2022	Pamela Proudfoot	Thank you for everything!!!
		Patrick Hart	Patrick Hart keep being you, you were a fantastic trainer. I enjoyed alot on the class.
		Pippa Tooley	The instructor was very thorough and answered all of my questions. I really enjoyed the training class.

The instructor created a positive learning experience.	Strongly agree 68%	Agree 27%	
The instructor encouraged questions and participation.	Strongly agree 68%	Agree 27%	
The instructor engaged learners and built a rapport with the audience.	Strongly agree 67%	Agree 28%	
The instructor explained concepts clearly.	Strongly agree 68%	Agree 28%	
The instructor was effective and listened well to questions asked.	Strongly agree 67%	Agree 28%	
The instructor was knowledgeable about the subject matter.	Strongly agree 67%	Agree 28%	
The instructor was organized and prepared to teach the subject matter.	Strongly agree 68%	Agree 29%	

Level 2





# How

## Our Experience in developing your Process Inputs

### Workplace Simulations

Can a trainee navigate the playground-based scenario

### Assessments

Demonstrate Proficiency

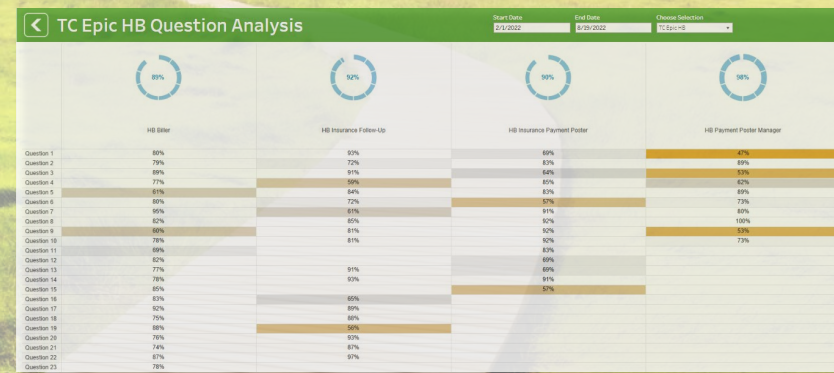
Validate training content

Validate assessment instrument design



Validity Testing

Level 3







# How

## Our Experience in developing your Process Inputs

Measures would typically be business or organizational key performance indicators, such as volumes, values, percentages, timescales, return on investment, and other quantifiable aspects of organizational performance

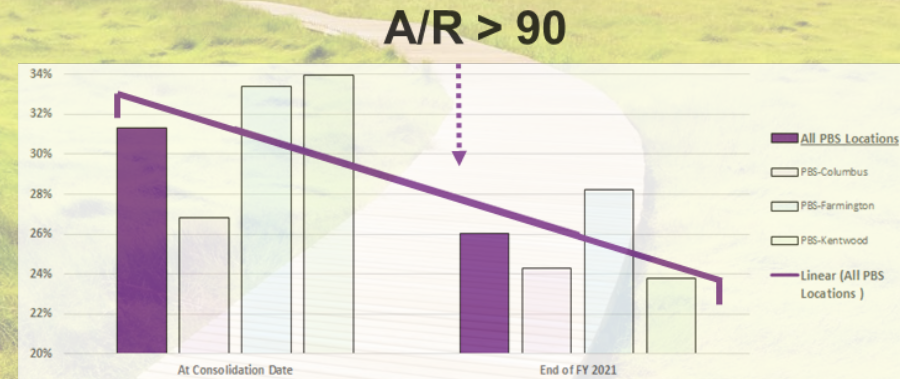
Our team trained those who accomplished this. However, we can only say we were part of a winning team

Future measurements will focus on:

- Trainee time to readiness- or 80% productivity and quality

Accounts Receivable (A/R) less than 90 days:

- Pre-Consolidation 31%
- Post- Consolidation FY 2021 26%





# How

## Our Experience in Process Outputs

Determine once you have data, how are you going to use it

Transparency

Accountability

Line of Sight

Visual Management

Coaching

Performance Evaluation

Utilize technology

Minimal duration between training and evaluation or assessment preferred







# How

## Our Experience in Suppliers

Once you know  
what you have,  
use that

We started with paper  
evaluations

We started with paper  
assessments and manual  
scoring

All of which were then  
scanned and uploaded  
daily from 3 different brick  
and mortar locations

We used Excel for a Visual  
Management dashboard

We had no standardized  
content

We had not yet  
implemented Epic

Data Analytics was not yet  
created

It was one step at a time





# How

## Our Experience with Customers and Stakeholders

### They love it

Leadership meets on Outcomes weekly

We conduct Root Cause Analysis to isolate performance issues

We rapidly implement changes and now fall forward rapidly

The team reviews the data weekly

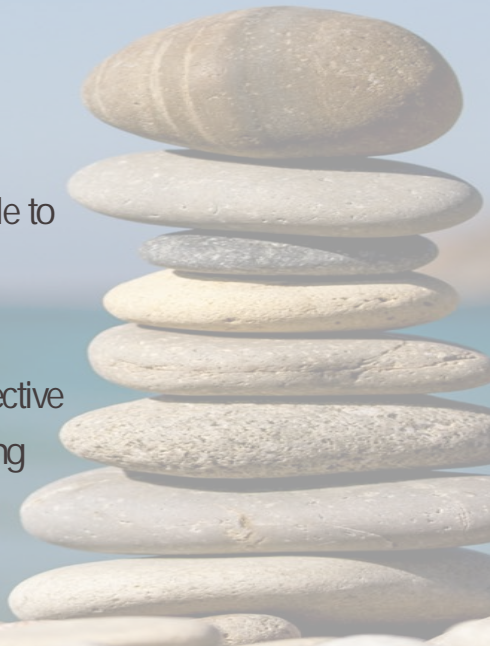
They create Individual Development Plans if needed

We review and revise content consistently with a Review Committee

Customer Recovery happens immediately

We are objectively able to quantify our Value Equation

We are amazingly effective and display an amazing trend







# How

## Training Dashboard 2.0

Landing Pa..

Click on icon to view individual sub-dashboards:

Data through last evaluation: 7/17/2022



Onboarding Evaluations



TogetherCare Evaluations



Legacy Evaluations



Assessments



Onboarding Evaluations Archived





# How

## Presentation Toolkit

Trinity Health: [Website](#)

SIPOC: Video: [SIPOC Diagram Simplified](#) Adriana Girdler Introductory/ Tutorial

Survey Data Measurement, Validity, and Reliability: [Video](#)

Kirkpatrick Model: Video [Kirkpatrick's 4 Levels of Evaluation in One Minute](#)

Visual Management: Resources: [Agency for Healthcare Research and Quality \(AHRQ\) Visual Management](#)

Formal Education/ Certification: [Lean Manufacturing - Nexus at Michigan Engineering \(umich.edu\)](#)

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