

CASE STUDY

for U.S. health care providers

How Structural Heart Programs Can Build and Sustain Referral Relationships

Three strategies to improve provider engagement and streamline referrals

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Overview

The challenge

Referring providers face barriers to ensuring their patients receive aortic valve replacements (AVR) in a timely manner, such as uncertainty about who and where to refer and concerns about the risks. To address these challenges, programs traditionally rely on forums like lunch and learns and symposiums. These are valuable, but don't engage providers in their patients' treatment or support long-term referrer relationships.

The organizations

- Overlake Medical Center is a 349-bed non-profit regional medical center based in Bellevue, Washington. Their cardiothoracic surgery clinic is staffed with three physicians and four physician assistants.
- Henry Ford Health has over 250 locations throughout Michigan, including five hospitals. The first transcatheter aortic valve replacement (TAVR) in the U.S. was performed here. The structural heart team at the Henry Ford Heart and Vascular Institute is comprised of twelve physicians, six nurse practitioners, and one physician assistant.
- TriStar Centennial Medical Center is a 741-bed facility that is part of TriStar Health, an 11-hospital health system serving Tennessee and southern Kentucky. Structural heart procedures are performed at the TriStar Centennial Heart & Vascular Center, which has 21 physicians and one nurse practitioner.

The approach

Structural heart programs can improve their provider outreach strategy by involving referrers in heart team meetings throughout their patients' care journey, utilizing a tracking platform to identify at-risk referrers, and streamlining referrer and heart team communication through a standardized communication channel.

The result

By enhancing the provider outreach strategy, structural heart programs have achieved greater engagement and buy-in from referring providers, growth in AVR volumes, reduced time-to-treatment, and improved satisfaction for both referrers and schedulers.

Approach

While structural heart volumes are growing, programs must capitalize on opportunities to better engage, support, and communicate with referrers to maximize volume potential. We've identified three strategies to achieve this.

The three strategies

01 Engage referrers throughout the care pathway

02 Use tracking platform to identify at-risk referrers

03 Streamline communications for referrers and heart team

01 Engage referrers throughout the care pathway

Overlake Medical Center (Overlake) improved its referrer engagement strategy by involving referrers in the AVR care pathway. Overlake recognized that the responsibility for sustaining referral relationships should not fall solely on the physician liaison, but to all staff who touch the AVR patient journey. To implement this strategy at your organization, follow two steps.

Step 1: Align staff on referrer engagement strategy

Develop a referrer engagement strategy that aligns staff through a shared, common mission. For example, Overlake identified three mission-critical goals that are essential to their staff and are foundational to their referrer engagement strategy.

These goals also address referrers' top concerns, improving referrers' confidence in Overlake and building strong relationships.



KEY CONSIDERATIONS FOR A FRAMEWORK

- Components that are critical to your mission
- Where your organization has seen the most success
- Program staff input
- Needs of your referrers
- Needs of your patients

Overlake's referrer engagement framework: Three ways referrer buy-in is achieved



COLLABORATIVE CARE DECISIONS

Referrers are engaged early in the patient journey and are involved in the decision-making process



HIGH-QUALITY CARE

Transparency on quality outcomes helps build referrer trust



STRONG PATIENT EXPERIENCE

Overlake places a consistent emphasis on patient experience when meeting with referrers to foster buy-in






1. ENGAGE REFERRERS THROUGHOUT THE CARE PATHWAY

Step 2: Identify forums to involve referrers in patient journey

Engage referrers by inviting them to forums throughout the patient journey. Select forums that highlight your engagement strategy goals (such as quality), are collaborative, and have a recurring cadence to build lasting relationships. Overlake engages referring providers by inviting them to three different forums including valve clinic meetings, quality and leadership meetings (e.g., cardiac quality or leadership meetings), and one-on-one touchpoints (e.g., meeting with referrers after in-person meetings).

Value of collaborative forums for referrers and heart team

	 VALVE CLINIC MEETINGS	 QUALITY AND LEADERSHIP MEETINGS	 ONE-ON-ONE TOUCHPOINTS
For referrers	<ul style="list-style-type: none"> Explains patient medical history and family background Feels involved in care decisions 	<ul style="list-style-type: none"> Reviews quality data such as readmission rates and LOS¹ Understands programs' quality focus 	<ul style="list-style-type: none"> Builds stronger relationships with heart team members Feels like part of the heart team
For heart team	<ul style="list-style-type: none"> Asks referrer in-the-moment questions about patient medical history 	<ul style="list-style-type: none"> Highlights strong quality outcomes for SH procedures Addresses referrer quality or outcome concerns 	<ul style="list-style-type: none"> Creates opportunity to address referrers' top concerns like quality, patient experience, and access

Results

Overlake's provider outreach strategy has helped secure long-term program buy-in from referrers. It fosters a team dynamic where specialists and referrers operate under a shared set of values, making referrers likely to continue referring to Overlake and encourage others to do the same. When referrers experience the program for the first time, they see what it can do for their patients and feel like part of the program.

1. Length of stay

Source: Overlake Medical Center; Advisory Board interviews and analysis.

02 Use tracking platform to identify at-risk referrers

Henry Ford Health’s structural heart program improves referrer engagement by proactively identifying and supporting referrers who have procedure questions or program concerns. They do this by leveraging a tracking platform and feedback from the program’s outreach RNs and structural heart physicians. Follow these steps to implement this strategy.

Step 1: Establish dual-level accountability metrics to track referral performance

Establish a clear definition of what successful referral performance looks like and the metrics you will use to track this at the program and outreach RN level. Tracking metrics at both levels provides a holistic understanding of referral performance. Henry Ford Health tracks these metrics:

<p>▶ Program metrics</p> <ul style="list-style-type: none"> <input type="checkbox"/> Number of new appointments created <input type="checkbox"/> Number of outpatient consultations <input type="checkbox"/> Number of new medical record numbers 	<p>▶ Outreach RN metrics¹</p> <ul style="list-style-type: none"> <input type="checkbox"/> Number of weekly office visits made <input type="checkbox"/> Number of events planned for specialists and referrers (e.g., lunch and learns, dinners, and presentations)
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They track program-level data in the EMR and can sort it by referring provider to uncover changes in referral patterns for each provider.

Outreach RN job description



OUREACH RN

An outreach RN or Nurse Outreach Coordinator functions as the liaison between the referring physician and specialist. Primary responsibilities include planning events for referrers and supporting referrer-specialist relationships.

1. Outreach RNs conduct outreach to referring providers

Source: Overlake Medical Center; Advisory Board interviews and analysis.



2. IDENTIFY AND SUPPORT REFERRERS WITH TREATMENT CONCERNS

Outreach RNs share a monthly email with the team to provide updates on outreach performance and intel on referrer relationships. They meet with the administrator to discuss performance and share insights on referrers such as feedback on communication and access to appointments and procedures.



SAMPLE EMAIL SCRIPTING POINTS

- Are referrers receiving communications from Henry Ford?
- How is access to appointments and procedures?
- How long is it taking for a patient to be scheduled?

Step 2: Create a centralized tracking platform to track referral performance and identify opportunities for improvement

Next, create or designate a data platform to track referral performance. Programs can use an existing data platform, invest in a new one, or create a DIY version in the interim. When making the case for a new platform, emphasize its role in benchmarking program performance over time to provide a holistic picture of referral patterns. Henry Ford Health uses their platform to track referral performance and proactively address drops in referrals.

Organizations must select stakeholders to review data at regular intervals. Henry Ford Health reviews data monthly during their referral strategy leadership meetings with the Referring Physician Office (RPO) director and Outreach RNs. The RPO director has the most knowledge on overall referral patterns, while Outreach RNs have the most insight on individual referrer relationships. This makes them best suited to review and provide strategy recommendations.



2. IDENTIFY AND SUPPORT REFERRERS WITH TREATMENT CONCERNS

Structural heart programs should also receive feedback from its physicians on referral trends. Henry Ford Health does this by meeting with their structural heart physicians quarterly. During these meetings physicians share their experiences with referrers whose patients they've cared for.

Step 3: Identify outlier data points to tailor interventions for at-risk referrers

Use insight from the data platform, outreach RNs, and structural heart providers to better understand who is an at-risk referrer and why. At Henry Ford Health, the outreach RN is instrumental in repairing referrer relationships. They reach out the referrers to provide tailored support and mend the relationship.



TACTIC IN ACTION

When an anatomically challenging patient received a TAVR using an investigational device, referral data revealed that the referrer stopped sending patients to Henry Ford Health. Since this data was captured, an outreach RN was able to reach out to mend the relationship. They did this in three steps:

1. Reached out to the physician regarding the decline in referrals
2. Met with the physician and uncovered concerns about the investigational procedure the patient received
3. Addressed concerns about procedure and repaired the relationship

Results

Henry Ford Health created performance accountability at the program and individual levels, established new referral relationships, and enhanced existing relationships by proactively identifying and addressing concerns. This led to growth, as Henry Ford Health generated 324 structural heart appointments from external referrals in 2021. While not structural heart specific, these strategies helped their RPO connect with nearly 2,000 referrers in 2021.

03 Streamline communication for referrers and heart team

Digital solutions that enhance the referral experience are becoming more widely available. These solutions help organizations win over referrers and play a role in streamlining the referral process. TriStar Centennial Heart & Vascular Center (Centennial) recognized this and invested in a cloud-based tool to create a single platform for communication between referrers and structural heart physicians. Previously, the referral process was slow and involved several rounds of communication which increased time to treatment and could lead referrers to send patients elsewhere.

Step 1: Message the benefits of the platform to secure stakeholder buy-in

When making the case for a single communication platform, start by securing buy-in from IT. Next, ensure utilization by socializing the platform and communicating its benefits with structural heart staff and referring providers. Finally, share data from other service lines or organizations that are using the platform to further emphasize its value.

Benefits of a standardized communication channel

▶ Heart team benefits

- Have a single place for all patient-related information and communication
- Ability to quickly communicate with the referrer

▶ Referrer team benefits

- Easily share medical records and images
- Communicate real-time with schedulers and structural heart team
- Have access to the structural heart schedule and post-procedure imaging and results

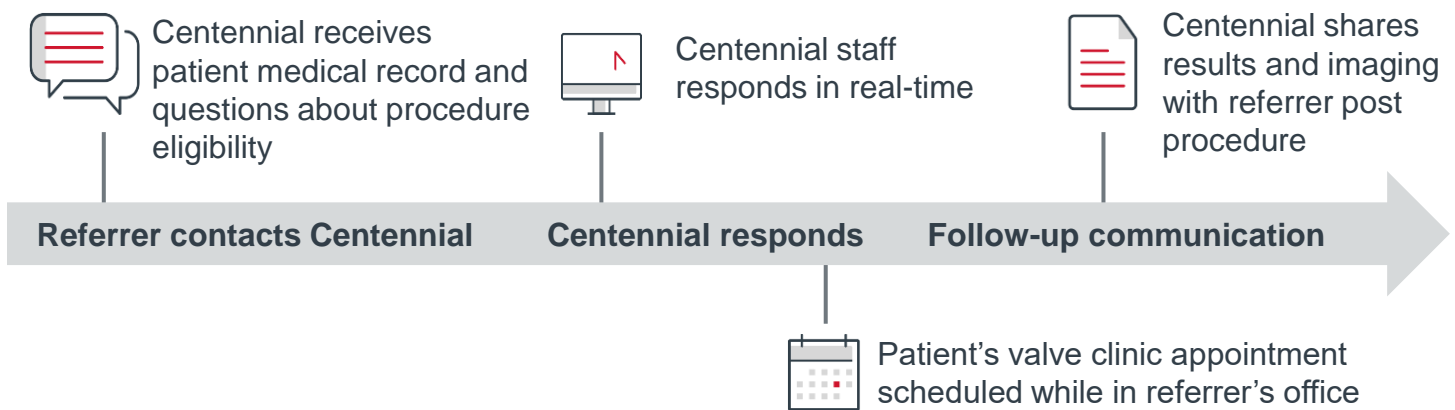


3. STREAMLINE COMMUNICATION FOR REFERRERS AND HEART TEAM

Step 2: Build IT infrastructure based on resources and staff preferences

Develop a communication platform by considering available resources and features that are important to your staff. This platform should streamline communication between referrers, structural heart physicians, and schedulers. Centennial’s tool does this through a three-step communication pathway.

Centennial’s communication pathway



When developing or selecting an application, consider:

- **Security:** At a minimum, any health data exchanged on the platform should be encrypted to ensure security, HIPAA compliance, and protect patient information.
- **Platform type:** Select either a standalone platform or one that can be embedded into your EMR depending on budget, urgency, implementation timeline, and ability to provide training to your staff. The platform is ideally embedded into the EMR, making it more seamless for staff to use.
- **Functionality:** The platform should allow two-way communication between the heart team and referrers through messaging and the exchange of medical records, images, and test results.
- **Staff needs:** Identify and incorporate components that are most important to staff and ensure they utilize the platform over time.

Launch the platform in phases and adjust it based on feedback before full implementation.

Centennial tested its platform in 30- and 60-day pilots. These demonstrated its potential to close communication gaps and provide immediate access for referrers.



3. STREAMLINE COMMUNICATION FOR REFERRERS AND HEART TEAM

Step 3: Adapt communication timelines based on platform functionality and physician workflow

Staff must review the platform at regular intervals so that communication happens in a timely manner. Ideally, staff respond to messages when they arrive. Centennial enabled their platform to send notifications to structural heart providers when they receive a message so they can reply in real-time. For platforms that do not have a notification feature, determine a cadence for reviewing and responding to messages based on physician workflows. This prevents unnecessary communication delays so that providers have the information necessary to develop a treatment plan.

Results

Centennial Heart and Vascular Center’s cloud-based communication application streamlined the referral process and increased referring provider engagement. Since the platform’s implementation, leaders have seen improvements in:

- Growth in structural heart volumes
- Timeliness to treatment
- Referrer satisfaction
- Scheduler satisfaction

20%

Growth in structural heart volumes over the last year.¹

“FROM OUR INTERVIEWS

[The cloud-based application] has improved timeliness to treatment. The primary reason is that [it] brings all of the referral elements together in a streamlined process: initial referral, transfer of records/diagnostic images, physicians and schedulers for both the facility and [referring] practice.

Chief Operating Officer

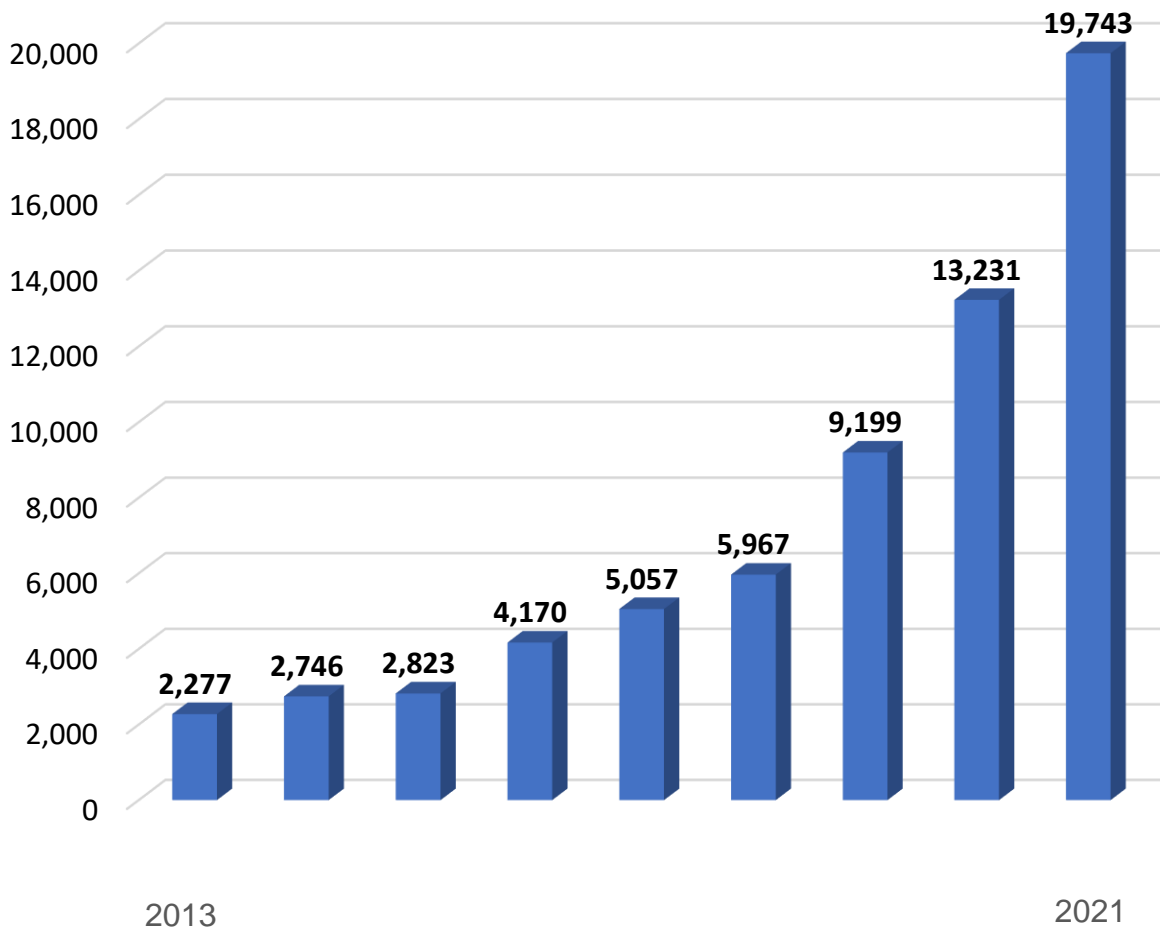
TriStar Centennial Heart and Vascular Center

1. Although the platform is not the only contributing factor, leadership believes that its ease of accessibility and communication has played a significant role.

Appendix

Henry Ford Health's dashboard for appointments via external referring provider

OPD Appts via RPO from External Referring Providers

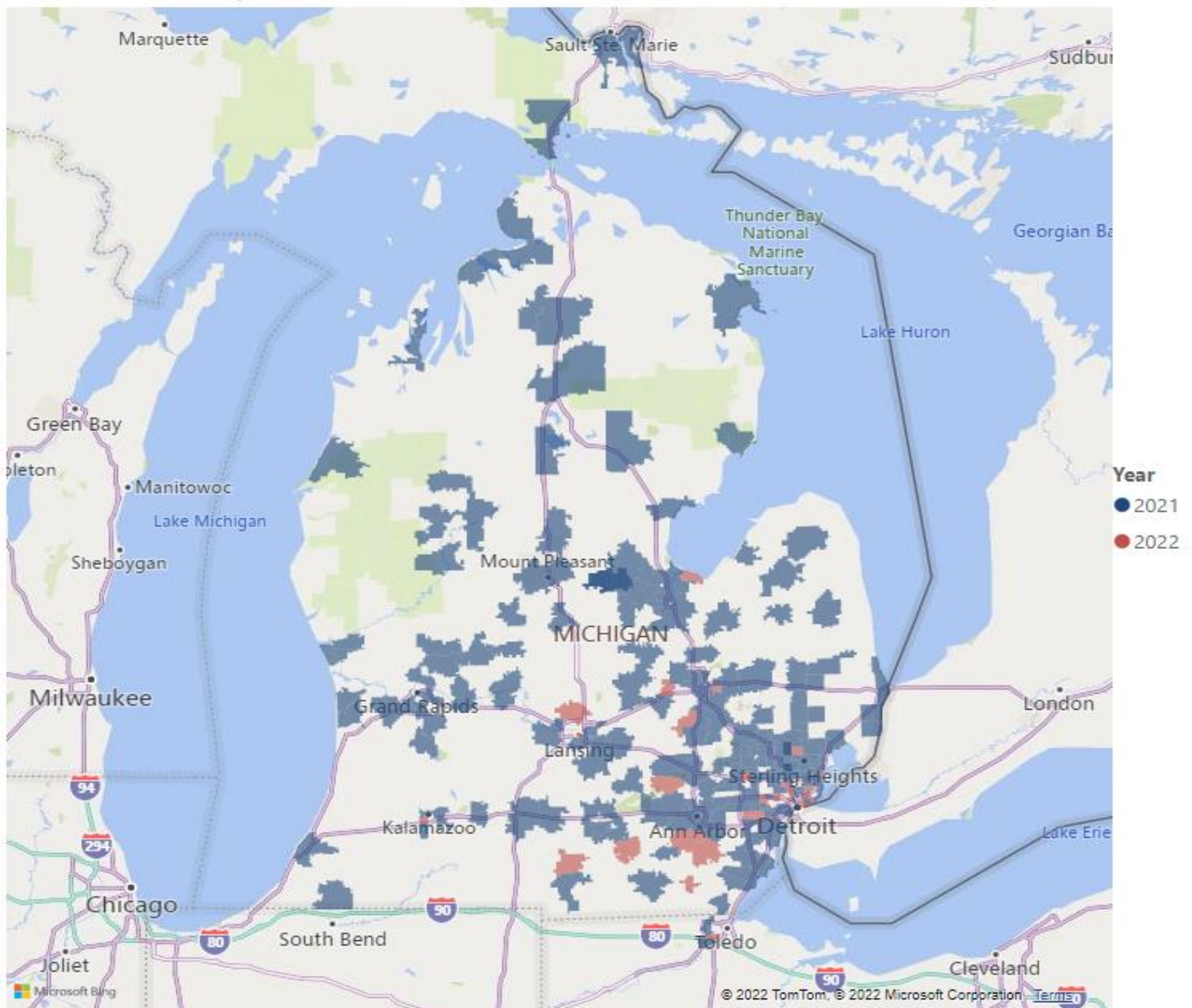


Source: Overlake Medical Center; Advisory Board interviews and analysis.

Appendix

Henry Ford Health's heat map of RPO RN outreach by year

RPO RN Outreach by Year



Source: Overlake Medical Center; Advisory Board interviews and analysis.

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