

Healthcare in transition: from patient centred to customer focused care

Healthcare across the globe is transitioning. Importantly, it is an industry that is progressing to be able to take full advantage of digital technologies, services and initiatives, along with the millions of connected devices heralded by the Internet of Things (IoT).

And for what reason?

Simply put, it is the ability to put the patient at the centre of the care experience and to take a more comprehensive view of their lifestyle, age and the social determinants of care into account in the care management process. This reflects the notion of the “patient as the customer”. Fundamentally, it is an acknowledgement of the lifecycle of care and the continual assessment this engenders.

Significantly, it is a move away from the episodic patient experience that dictates most patient care today.



ESBA: A journey planner for health care management transformation



ESBA was founded in 1927 in Northern California's San Francisco Bay Area and is accredited by

CARF International for meeting internationally recognised standards for providing the highest quality of services. The company is an affiliate of the Chicago-based Easterseals organisation, which was established in 1919 and today has 73 offices around the United States. Easterseals' affiliate offices tailor their service offerings to the needs of their local communities.

For the past 90 years, ESBA has provided services to people with disabilities and their families to help them live, learn, work and play to their fullest potential. ESBA is at the forefront of care for people with autism, and is a founding member of one of the largest behavioral health networks in the U.S. which offers evidence-based treatment, such as applied behavior analysis (ABA), occupational therapy, speech therapy, and physical therapy to clients.

Between 2012 and 2016, ESBA increased the number of clients it served by 640 percent. Today, the behavioral health network is comprised of more than 100 health provider organizations – including ESBA – and approximately 4,000 healthcare practitioners. Over the past five years, ESBA took the formal step of organising the network of providers under the BHPN (Behavioral Health Provider Network). This enables ESBA to focus on service delivery in the San Francisco Bay Area, while the BHPN

focuses on the case management and care coordination across the providers in Northern California. ESBA is itself one of these provider companies, employing nearly 400 practitioners. Since it was established in 2012, the BHPN has evolved into one of the largest behavioral health networks in the U.S serving more than 5,000 clients in Northern California. And there is growing demand for its services.

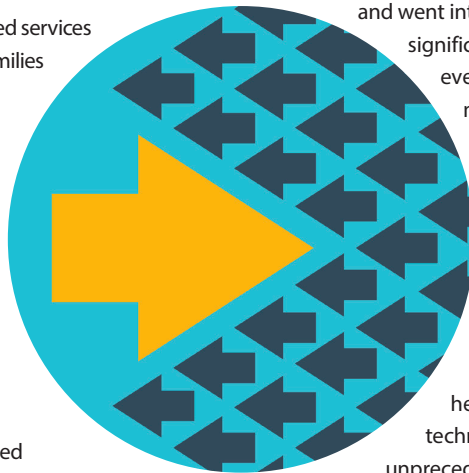
Change agent for ESBA

The California Autism Insurance Law (SB 946) passed in 2011 and went into effect in 2012, brought in a number of significant requirements. It mandated that every healthcare plan providing hospital, medical, or surgical care should also cover behavioral health services, to treat individuals with developmental or physical disabilities and other special needs. Consequently, the demand for behavioral health services in the San Francisco Bay Area surged.

ESBA was quick to collaborate with health organisations, providers and technology firms, to respond to this unprecedented demand and to extend access and affordability of services for Autism Spectrum Disorder (ASD) clients and their families.






Imperatives for transformation

As ESBA's customer base grew, alongside its network of behavioral health professionals, ESBA could no longer coordinate on paper the evolving web of services and



interactions between its expanding network of clients, care providers, doctors and insurers. Furthermore, ESBA offered behavioral services in-home, as those had proven to be more effective. To support its business development, in light of these changes, the company was looking for a platform to assist its transition from managing patient relationships to managing customer relationships.

In short, ESBA was looking to address a number of key issues:

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|  <p>The ability to scale the business to support the tremendous growth the organization experienced in its industry – resulting in a case load increase from 100s of active cases a month to 1,000s of active cases per month.</p> |  <p>The ability to support both the clinic and the home delivery of a complex care program, that annually services more than 5,000 clients and administers thousands of monthly appointments in a compliant coordinated way, so as to maintain a consistent high-quality delivery of service.</p> |  <p>To become the billing agent for an entire behaviour health provider network, responsible for patient statement generation and client co-share payment collection.</p> |  <p>Ensure that patient and care treatment data can be captured consistently and continuously, no matter the location of delivery (at home or onsite).</p> |  <p>Delivery of an integrated enterprise system, able to easily extend and support additional services and future capabilities as they become relevant to the needs of the organisation and its care management facilities.</p> |
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Spotlight on ESBA's care management requirements and challenges

A unique characteristic of dealing with behavioral health is that the care team is complex and multifunctional, involving a mix of clinical managers, internal case managers, care coordinators, para-professionals and customer care team members. The team could also include someone from the payer side; a case manager appointed by the hospital.

The network is responsible for the quality of all care, as well as for the billing for all clients for all appointments, for the approximately 4,000-plus practitioners, from 100 companies within the network.

Coordinating care for all its customers and patients is also challenging, due to the high frequency, multi-appointment service requirements. For example, within ESBA there will be multiple appointments per child per week with multiple practitioners, supervisors, case managers and clinical managers, all of whom need to be involved and kept up to date. Different members of the care team need to be coordinated in terms of their logistics and the availability of patient and care information. Any doctor seeing a

patient needs access to their charts and an overview of their medication, as well as the means to coordinate with specialists when required.

ESBA Strategy and the

Salesforce fit



The organization's strategy has always been to create a network of healthcare practitioners.

Vital to this strategy is the ability to manage this network of information effectively and ensure accurate data on practitioners, based on their qualifications, credentials, work history and success rates. Without this capability, ESBA knew that it could not deliver on its quality of service goals or enhance them further. This fundamental requirement for network management capability raised the prospects of building capabilities using the Salesforce platform, specifically the company's Health Cloud, as an important and well aligned application for their transformation goals. Without such facilities on hand, ESBA would not have been able to achieve what it has done easily.

“Our integrated platform and suite of products are the building blocks that ESBA is providing for new services to meet our clients’ needs”

Paul Meijer, Senior Vice President of Cloud Operations, ESBA.

Salesforce Health Cloud: A power tool for healthcare management and process automation

Choosing Salesforce Health Cloud addressed a crucial aspiration for ESBA that aligns with an important directional focus for the healthcare industry: **A drive to make the patient experience more of a customer experience.**

At the heart of Salesforce business strategy and portfolio goals is a mission to deliver customer success, experience and engagement. To this extent, ESBA's customer care and network management system is built on Salesforce's core Customer Relationship Management (CRM) platform. Crucially, it is a platform portfolio of cloud services that is in use all over the world, by organisations of varying sizes and maturity and from across the market landscape.

A platform portfolio geared for extendable services

For ESBA, there is more to Salesforce Health Cloud. The Salesforce Customer Success Platform delivers an enterprise platform for business process automation that can be scaled across to affiliated organisations.

“By leveraging industry-leading technology and partners we are able to deliver new services, while at the same time increasing security and compliance.”

Paul Meijer, Senior Vice President of Cloud Operations, ESBA.

In keeping with its goal for integrated departments, ESBA continuously evaluates the Salesforce portfolio to see how it can be leveraged beyond the care team and the care cycle management process. In this way, the company is utilising different cloud services from the Salesforce portfolio.

Specifically:

- Marketing and Sales Cloud services to manage ESBA donors.
- A platform to host internally developed custom iPhone apps, providing backend services and Application Programming Interfaces (APIs) that allow the company to open up access to other networks.

Salesforce Health Cloud operation credentials

Salesforce Health Cloud provides a fully integrated system offering, that enables ESBA to automate the management of its network of practitioners and the complex care regime that it offers.

Specifically, it enables ESBA to manage its entire care cycle within the Salesforce Health Cloud environment. This includes everything from the initial referral, to receiving the authorisation and the management of the care cycle, including the assessment process.



Client case and practitioner tracking is a significant feature of the Salesforce Health Cloud Service for ESBA. With the Salesforce Health Cloud in place, ESBA knows that when an assessment is done, the organization has the ability to track exactly who is in which state of the care cycle.

client (patient) statement is generated. Processing is now well within acceptable parameters.

- The ability to pass very stringent and comprehensive healthcare audits, without any material findings, is a demonstration of a successful implementation and transformation journey.

In short, Salesforce Health Cloud offers ESBA a platform for transformation and progression.

Business Outcome: Achievement of a vision that delivers powerful business, operational and societal benefits

ESBA's driving goal is always to make a positive impact.

By providing the ability and scale, to not only manage client appointments, but also the entire customer relationship, ESBA takes out the complexity of offering healthcare related services, especially for smaller companies and individual practitioners. For example, ESBA can support payers who are not equipped to manage a fragmented network of multiple providers, with diverse levels of maturity in terms of knowledge associated with care management, claims processing or technology capabilities.



network management solution delivers comes from those in the industry with non-technological backgrounds but who understand both the business and clinical operations aspects. This influential cohort appreciates the complexity of what it takes to be in the healthcare industry, offering community-based services, where there are capacity constraints. While some of the providers in the past would have eschewed a managed network approach, preferring a direct relationship with the payer, all now recognise the value that ESBA's solution delivers: removal of hidden complexity, delivering

In developing and managing a highly scalable and feature rich solution, ESBA's network management capability has become the engine supporting and driving growth in its industry in Northern California. More importantly, it is an engine that enables the behavioural health services industry to make an impact at a societal level. Without it, ESBA would not have been able to scale for the different payers or provide the capacity needed for the growing demand efficiently or quickly.

Notably, the network management solution reinforces ESBA's vision to have a positive impact. Being able to help other Easterseals affiliates and other regions deliver a network management capability results in a much greater impact than that as a direct service provider. Evidence of the positive and significant impact that a

organisation in a fragmented industry and faster payment (15 days) through end to end management of the care management revenue cycle.

The art of the possible: A roadmap for continued progression

On the back of its investment and implementation of the Salesforce Health Cloud, ESBA plans a roadmap for the following services:

- 1 Analytics and Artificial Intelligence (AI) Support:** Currently, there are no analytics deployed to flag out problems or predefined issues. However, in building up client profiles based on what people put into the system, a range of smart analytical operations can be

applied to deliver a variety of beneficial insights. With the right level of detailed information and domain expertise, AI-based analytics can deliver more sophisticated interactions and superior levels of service.

2 Personalised behavioral treatment and care management: A key benefit of a Health Cloud-based care management solution is the ability to reach many different participants, across multiple devices, whenever it suits i.e. embodying the notion of anytime, anywhere and on any device. As part of its charter for delivering a holistic healthcare service, ESBA sees a patient's family as an integral part of the care team. However, unlike trained specialists within the care team, family members are not trained and therefore cannot always spot certain behavioral markers.

With a lightweight portal app geared towards capturing standardised data criteria, the goal is to enable parents and other approved family members to input data, outside of any appointments conducted at home or in the clinic. This

will allow the company to collect additional related data and observations and make it part of the case record profile, so that the case management team can have instant and immediate authorised access to the information, no matter the time or location. Subsequent versions of the application the company has developed, and updated on a quarterly basis, will focus on enabling interactions with parents and approved carers.

3 Reuse and extend: A next step to the evolution of ESBA's care management network is to be able to reuse what the company has built for the San Francisco Bay Area, to other affiliates and for other clients.

4 Building capabilities around centres of excellences: Support for centres of excellences, such as in providing a service line for homecare or children with autism, will allow ESBA to deliver integrated experiences for customers, either on the move or as they go through various life stages.

Technical Foundations and Implementation

An EHR system is designed for acute care, so to deliver a system more aligned to the needs of a home and community care and case management system, a custom solution was required.

The advantage of Salesforce Health Cloud is that it complements EHR capabilities, and is able to be customised and extended to develop a case management solution.

Technical resources and execution

Development and delivery support was provided through a combination of internally and externally sourced technical personnel. The external team consisted of a mix of product architects from Salesforce and external consultants experienced in implementing the Salesforce portfolio. The internal technical resources were made up of ESBA developers, enterprise architects and product managers with deep knowledge of the industry domain and close ties to the business and operation teams responsible for using the completed solution. The internal team was fundamental to ensuring that the right requirements were articulated and to help direct design decisions, also in executing much of the core development and testing requirements.

Agile practices, and in particular the scrum methodology, were used as the basis for delivering continuous development with sprints to review the cadence of delivery. Once again, this was internally managed to keep a close link with the business.

