

Private Professional Patient Advocates:

Making You the **Hero** in Healthcare

Chicago Patient Advocacy Symposium
September 2018




Trisha Torrey
Every Patient's Advocate
The Alliance of Professional Health Advocates

Who's Trisha and Why Is She Standing in Front of You Today?

- Mild Mannered Marketing Professional
- June 2004: Terminal Diagnosis
- September 2004: NIH news: No Lymphoma!




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Who's Trisha and Why Is She Standing in Front of You Today?

- The Alliance of Professional Health Advocates
- AdvoConnection Directory
- 6 books: 2 for patients, 4 for advocates
- Speaker and workshop leader



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It May Not All Be What It Appears

Regina Holliday's Walking Gallery

My jacket is unusual, because it's about

- great outcomes - at least the best we can hope for
- It's about win-win-win, which means...
- It's about **communication and collaboration** among all the participants on the healthcare team, **including YOU**

Let's look at that more closely...



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Let's Explore That...

It's about **communication**
and collaboration among all
the participants on the
healthcare team, **including**
YOU



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OK, so....



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Let's look at some recent healthcare system history

- 1990s: discussions of “healthcare reform” - why?
- Providers began to be squeezed for time
- Then....passage of the ACA
- And... passage of new Medicare laws
- And... HCAHPS “customer satisfaction” scores
- And... making DRGs match up to CPTs
- And.... so forth...
- More and more and more squeezing of time and efforts of providers
- The Healthcare System has become a victim of its own success

MARCH 2010						
SUN	MON	TUES	WED	THURS	FRI	SAT
	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30	31			

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Let's look at some recent healthcare system history

- 1990s: discussions of “healthcare reform” - why?
- Pro...
- The
- And
- And
- And
- And
- And
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Today:
 Way too much emphasis on money
 Not enough emphasis on care.

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	10	11	12	13		
	17	18	19	20		
	24	25	26	27		
	31					

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Let's look at some recent healthcare system history

Patients...

- ... are surprised at how the system had changed!
- ... are seeing money fly out of our pockets
- ... are frustrated because we no longer get enough time with our providers
- ... feel as if our doctors don't talk to each other
- ... are curious, consult with Dr. Google, ask too many questions (time suck!) and realize we aren't getting all the info we want from our providers
- ... may not be adherent due to confusion or cost
- ... seek more access to alternative and complementary medicine
- ... have stopped seeking care when needed, instead going to the ER



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Let's look at some recent healthcare system history

Doctors / Nurses / PAs / NPs / others...

- ... are pushed to the limit by payers w/ decreasing reimbursements
- ... are overwhelmed by the amount of research, the speed of research, and how fast their jobs are changing
- ... are squeezed even further by pharma, device makers, the government - and now patients, too
- ... are making mistakes more frequently: drug errors, surgical errors, infections, misdiagnosis
- Providers working with older adults are overwhelmed by sheer numbers of baby boomers
- And let's not forget implementation of EMRs!



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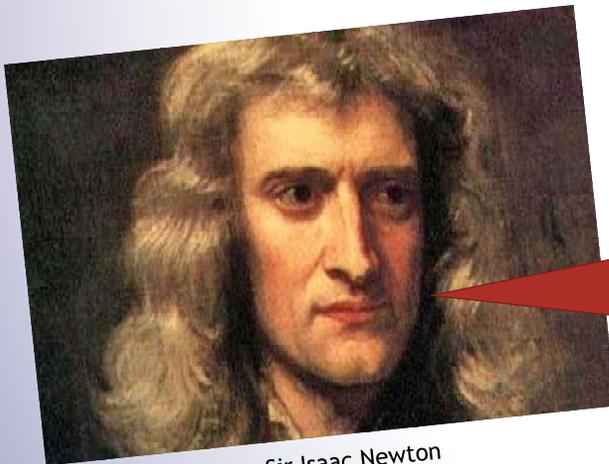
Bottom Line...

- Patients are being asked to take steps, ask questions, and make decisions they have never been taught to handle. (No one ever teaches us to be smart patients!)
- Providers are being asked to do much more - with much less support or reimbursement.
- The ACA and advance of EMRs has made this nexus a nightmare.
- We now have an **ENORMOUS GAP** between what patients need, what providers need, what they get, what they must pay for, and what they truly deserve to have for their efforts.



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Sir Isaac Newton

*Every action
has an
equal and
opposite
reaction...*

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Let's look at some recent healthcare system history

A Solution! Independent Health and Patient Advocates...

- ... smooth those rough edges for both patients and providers
- ... help maximize time: less time for providers, more time for patients
- ... help coordinate care - facilitating conversations among providers
- ... negotiate for fairness in costs
- ... help patients better understand what their providers have told them
- ... identify barriers to compliance - and reduce them
- ... keep patients safer in the healthcare environment



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So Who ARE These Advocate People?

- They are **independent of the healthcare system** - like lawyers are independent of the penal system, or tax preparers are independent of the IRS.
- They come from a variety of backgrounds, and come to advocacy with either **med-nav experience** or **billing and claims experience**. Approx 60% had clinical careers prior.
- The great majority have had an experience that compels them to choose advocacy, almost as a **“calling.”**
- They **skew older** (<age 50) (but we are beginning to see younger.)
- As of 2018, there may be up to 500 across the US.
- They solve the conundrum: **“You don’t know what you don’t know!”**



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What Can They Do for Your Patients?

- They are NOT medical (repeat!)
- They are guides, or connectors, or sherpas - not diagnosticians, providers, or performing any clinical care.
- They are independent, so can get around barriers.
- They smooth the rough patches for their clients - your patients - to help them find their best outcomes.
- They facilitate more effective communications and possibly better outcomes.
- Their role is to provide peace of mind.
- They are NOT a part of the reimbursement system, so they aren't taking money out of that system. They are (usually) paid directly by clients.
- They have total allegiance to their clients; not to hospitals, or insurers, or the government, or anyone else who profits from the system.



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Not Medical – so What Do they DO?

40+ Services listed at:
www.AdvoConnection.com/advocacy-services

2 categories:
 Care Services / Cost Services



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Not Medical – so What Do they DO?



Patient Advocacy and N

» Medical / Navigational Assi Case Management

- Diagnosis and treatment – review of decision-making
- Background research: diagnosis and/c
- Records review and discussion
- Prescriptions / Supplements / Medica
- Preparation for appointments
- Accompaniment to appointments
- Hospital bedside
- Pain Managem
- Healthcare prox
- Caregiver support
- Guardianship or Conservatorship Services

» Medical Billing / Health Insurance / Medicare / Payer Assistance

- Medical bill reviews and reconciliation
- Helping you choose the right health insurance plan or payer for you
- Filing and tracking medical bill paperwork and payments
- Negotiations: disputes, denials of claims, and appeals, for hospital bills or other medical billing
- Medicare or Medicaid recommendations and decision-making (Advantage Plans, Medigap, others)

» End of Life Planning Services

» Legal or Fiduciary Assistance (Medical / Healthcare Related)

- Worker's Compensation assistance
- Disability filings and review including Social Security Disability
- Malpractice and medical error review

» Mediation Assistance for Family Health Matters

- When difficult health-related decisions need to be made for a loved one, including family disputes (moving a parent into a nursing home, choosing an out-of-town treatment facility, and others)

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Not Medical – so What Do they DO?



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» Medical Billing / Health Insurance / Medicare / Payer Assistance

- Medical bill reviews and reconciliation

But patients need this help. And by providing these services, advocates are helping you, too.

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Let's Talk about Allegiance

Advocates often hear questions like:
“why should I hire you?”

- I can work with a patient advocate in the hospital!
- When I call my insurer, the person I talk to is the patient advocate!
- I got a call from the patient advocate at XYZ Pharmaceuticals last week!



Independent Advocates reply:

“We need to look at the allegiance of the person you ask to help you.”

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Let's Talk about Allegiance

Independent Advocates invoke
The Allegiance Factor

An advocate's allegiance must be to the person who provides his or her paycheck. Period.

A hospital advocate works for...

An insurance company advocate works for...

A pharmaceutical “patient advocate” works for...

A device manufacturer's “patient advocate” works for...



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Let's Talk about Allegiance

Independent Advocates invoke The Allegiance Factor

An advocate's allegiance must be to the person who provides his or her paycheck. Period.



Enter **Independent Advocates** ~ whose allegiance is **ONLY** to the patient-client he/she works with, because the person paying for the service is the client-patient, a loved one/caregiver, or someone else who does not profit from care or treatment.

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Allegiance: The Heart of an Advocate's Ethics

- We do not step on toes of medical professions (we are not medical)
- We do not make decisions for client-patients
- We look at allegiance when we identify resources (examples: clinical trials, or web resources)
- We do not accept referral fees
- ... other ethical tenets



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Allegiance: The Heart of an Advocate's Ethics

Independent advocacy is among the MOST ethical of professions:

Integral focus of
Patient Advocate Certification
www.PACBoard.org



And the Health Advocate's Code:
www.HealthAdvocateCode.org

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Today the reverse is true

Poll:

- How many have worked with an advocate?



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So let's revisit history for a moment

Oy! No clinicians wanted us in the room!

- "I don't want anyone in the middle of my relationship with my patient!"
- "I don't want a stranger sitting at the hospital bedside knowing she might report me for not doing my job!"
- "I don't want to risk violating HIPAA for an extra person who's not even related to this patient!"
- "The questions an extra person will ask will take too much time!"
- "I refuse to deal with an extra person - and this EMR, too!"



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Today the reverse is true

In the doctor's office or treatment center:

- Patients arrive to appointments with a concise list of questions.
- During intake: an advocate can often answer questions about symptoms and adherence that patients cannot.
- After appt, advocates clarify instructions, check on insurance coverage, follow up the next steps providers recommend.
- Advocates go home with the patient to be sure instructions are understood and followed. Improved adherence.



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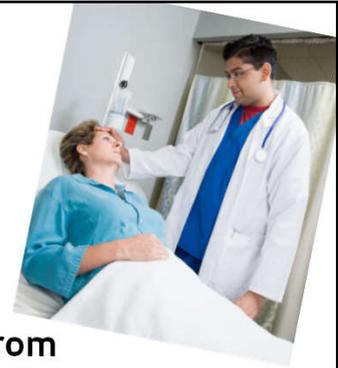
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Today the reverse is true

Hospital care:

- Patients arrive prepared with advance directives and HIPAA signatures
- Safety! Advocates may sit by the bedside or teach family / friends to keep the patient safe from drug errors, infection, falls
- A more pleasant experience translates to better HCAHPs scores
- Advocate can go home with patient to enforce discharge instructions
- Improved experience may mean fewer readmissions



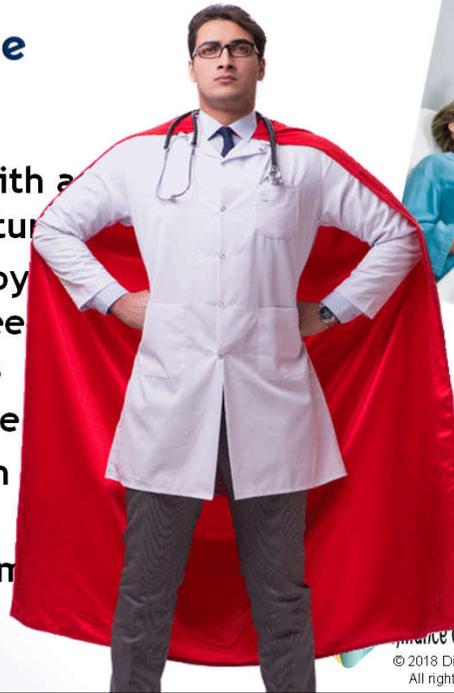
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HPs scores
rge

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Today the reverse is true

For providers overall:

- When patients are better prepared, abbreviated time frames are easier to adhere to (you'll run behind less frequently).
- When your questions are answered more concisely, easier to diagnose or treat.
- When prescriptions are filled, tests are taken, easier to work with patient - and succeed.
- When problems crop up at home for patient, advocate can enforce next steps (new appointment, phone call to doctors office, etc).
- When you have another professional to lean on, you can achieve more with your patient.
- When pieces fall into place more easily, it smooths your day at the office, leading to

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Today the reverse is true

For providers overall:

- When patients are better prepared, abbreviated, and adhere to (you'll run behind less frequently).
- When your questions are answered more completely, you can better choose or triage.
- When you are taken into account, you can better manage patient -
- When you can better manage patient (can't see next to doctor, etc).
- When you can learn, you can advance more with
- When pieces fall into place more easily, it smooths your day at the office, leading to

Improved Job Satisfaction!



Independent advocates are the solution!



So at this point in this talk, you may be thinking...

Where do I find one of these hero-makers?

Or how does my patient find one?

**Let's talk about
great resources:**



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You WON'T find them in the Yellow Pages



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Find independent patient advocates online:

AdvoConnection.com

Most comprehensive directory of professional, independent patient advocates.

Other directories are available, but smaller:

- Greater Chicago Advocates
- NAHAC

Or just Google: “private patient advocate”, location, specialty area



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Private Professional Patient Advocates: Making You the **Hero** in Healthcare

Questions?



Trisha Torrey
Every Patient's Advocate
The Alliance of Professional Health Advocates

