



Improving Clinical and Financial Outcomes in a Managed Medicaid Population

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Customer Case Study: Health Plus

Executive Summary

In March 2007, Health Plus, one of the fastest growing not-for-profit managed care organizations in New York, and Health Integrated partnered to launch Synergy Targeted Population Management®, branded for Health Plus as To Your Health! The program focuses on assisting and empowering chronically ill Medicaid members struggling with co-morbid behavioral, psychological and social support issues. In its first twelve months, To Your Health! improved clinical outcomes, lowered avoidable utilization and achieved significant cost reductions.

This case study recounts the key factors that can be attributed to the program's success, including:

- ❖ Accurately identifying those members with the greatest opportunity for change and impact – the chronically ill with psychosocial barriers
- ❖ Incorporating consumer-oriented engagement strategies, including local outreach, to drive active participation
- ❖ Empowering members through a seamless biopsychosocial approach and active care coordination
- ❖ Measuring progress along the way and collaborating to refine program and processes

To Your Health! continues as an ongoing program today, reaching more Health Plus members and driving positive outcomes across clinical, utilization and financial measures.

Empowering a Medicaid Population to Take Control of their Health

The healthcare debate in the U.S. has become increasingly complicated in recent years as the problems facing the country have become more critical. An ever-growing number of people – about 45% of all Americans—are now living with one or more chronic illnesses, driving healthcare costs up. These illnesses are often exacerbated by psychological or social challenges such as depression or lack of family support, leading to higher care costs and lower quality of life. Rising unemployment and a declining economy serve to drive greater numbers of people toward Medicaid and government-subsidized health plans. These same economic realities and life situation factors can also add to, and are themselves, psychosocial issues that contribute to higher care costs. Additionally, as the baby-boom generation reaches retirement age, a growing percentage of the U.S. population is joining the Medicare ranks. More and more, government and not-for-profit plans will bear an increasing share of the healthcare burden. These are all difficult and urgent challenges.

While these challenges do exist, there are workable solutions to overcome them. Health Plus knows this well. As a 25-year old managed care organization with a commitment to providing coordinated, quality health care and improving access to health care for uninsured and underserved families, Health Plus' membership of nearly 270,000 includes a predominant percentage of Medicaid, Medicare and lower income individuals with disproportionately higher costs than typical commercial health plans face.

In 2006, Health Plus began investigating ways to improve the health and clinical outcomes of its members while reducing the cost of care for its most expensive member segments—individuals with a chronic illness and co-morbid behavioral, psychological and social support issues, such as depression, stress, poor nutrition or lack of family support. Not only are these patients clinically complex and hard to reach, but also they are difficult to motivate, and their struggles with complicated psychosocial factors exacerbate medical conditions and increase care costs through inappropriate and avoidable healthcare utilization.

Chronically Ill Members with Behavioral Health Co-Morbidities: Population Segments and Costs		
Population Type	% of Population	% of Cost
<ul style="list-style-type: none"> • Medicaid • Medicare • Typical Commercial Plan 	<ul style="list-style-type: none"> • 5-15% • 12-19% • 5-10% 	<ul style="list-style-type: none"> • 25-50% • 29-35% • 20-30%

Across multiple health plan population types, the chronically ill with a behavioral health co-morbidity account for only a small percentage of the population but a disproportionately large percentage of costs.¹

¹ Solucia Consulting, 2008

“We partnered with Health Integrated to deploy the To Your Health! program because we saw in Synergy the opportunity to better reach, engage and improve the health of our most challenging members while significantly reducing the cost of care”

-- Clifford Marbut, MD, Chief Medical Officer, Health Plus

With some “traditional” Disease Management programs already in place to focus on specific conditions, Health Plus realized that this higher cost segment was still not being addressed. Their most challenging members tended to have *multiple* chronic conditions as *well as* psychosocial barriers that prevented them from following their treatment plans and practicing good health self-management. Recognizing this challenge, Health Plus chose to partner with Tampa-based Health Integrated to deliver Synergy Targeted Population Management® (Synergy) to improve the health and reduce the disproportionately high cost of this segment of the Health Plus population. Designed by experienced medical and behavioral health professionals, clinicians and public health experts, Synergy is a unique program for the chronically ill that improves clinical outcomes and lowers avoidable utilization by addressing the critical interplay between psychological, social and physical health. Rather than focus condition by condition, Synergy looks at all of the issues a member faces and addresses them holistically.

This targeted approach is effective because it helps individuals to first address a wide range of psychosocial barriers in order to enable them to take action on improving their medical health. For example, are these individuals suffering from depression that impacts their motivation to get well? Do they have transportation to the doctor? Are there language complexities or underlying social issues that might keep a person from following a health regimen, or lead them to use expensive healthcare resources, such as emergency room visits, more than is necessary?

In March 2007, Health Integrated and Health Plus launched the Synergy program under the brand name: Health Plus To Your Health!

The impact of this innovative program has been clearly demonstrated. After its first year, Health Plus has achieved significant cost reductions, which could not have been possible with a conventional disease management program, due to the undifferentiated approach across chronically ill segments, regardless of the presence of behavioral health conditions and other psychological or social barriers, which can typically add 50% to 100% to the cost of care.

In the case of Health Plus, this population cost nearly four times more per member per month than their non-eligible population, providing an extraordinary opportunity for savings by addressing the biopsychosocial aspects of their members’ health conditions. Cost reductions came in the form of dramatically lower utilization rates on metrics including, predominantly, Hospital Admissions and ER Visits.



Health Plus translated the program name and materials into Spanish and ensured that Spanish-speaking outreach coordinators and care coaches were available to serve members with those language needs.

Synergy: An Innovative, Results-Oriented Program

Synergy Targeted Population Management[®] includes five major components working in concert, each with unique capabilities that fit ideally with Health Plus' own philosophy and program needs:

- ❖ **Synergy Identify[™]**: *Determine which members to target, based on proprietary analytics incorporating medical and psychosocial risk factors and customer-specific program objectives.* Health Integrated worked collaboratively with Health Plus to establish criteria for inclusion in the Targeted Population.
- ❖ **Synergy Engage[™]**: *Reach out to these individuals using high intensity consumer marketing techniques to drive the highest engagement levels.* The To Your Health! program made use of direct-to-consumer marketing protocols and outreach strategies across multiple communication modalities (e.g., mail, telephone, automated messaging) to encourage participation among identified members of this difficult-to-reach population.
- ❖ **Synergy Empower[™]**: *Address underlying psychosocial issues, then motivate and coach members toward better self-management and improved medical health.* To Your Health! accomplished this through an integrated, coordinated focus on total health, including interventions to: address psychosocial issues, educate and motivate members to better manage their care, improve communication between member and providers, make connections with care providers to ensure that all parties are mindful of new care goals.
- ❖ **Synergy Impact[™]**: *Focus on goals and measure results along the way using transparent metrics to guide the program.* Health Plus had complete visibility into key program measures enabling them to monitor progress and adjust the program as needed along the way.
- ❖ **Synergy Connect[™]**: *Connect members of the care community – providers, health plan, community resources – to drive member participation, integrate care and establish referral mechanisms across available member resources.* Health Integrated deployed a local Outreach Coordinator in New York City as a liaison to Health Plus and to drive engagement, and established a Care Coordination process in order to facilitate referrals to and from To Your Health! and other health plan resources.

A deeper look at how each of these components worked to deliver success for To Your Health! is outlined throughout the rest of this paper.

Identification - Targeting an Exact Member Population

The identification phase was the first step in targeting the population of members eligible for the To Your Health Program! Health Plus worked with Health Integrated to co-develop strategic inclusions to define the population that would be the focus of the program—those individuals reflecting the greatest opportunity for change and impact. Among the eligibility criteria Health Plus selected were medical and psychosocial risk, presence of high cost, longer-term conditions and higher than average care costs.

As is standard in the industry, health care claim and membership enrollment data was used to determine presence and severity of conditions, eligibility for program enrollment and financial performance and outcomes over time. Unique to Health Integrated is the capability to employ sophisticated analytics, proprietary algorithms, and predictive modeling to analyze this data and identify people with elevated medical *and* psychosocial risk, higher per member per month costs and co-morbid conditions. This proprietary capability has been fine-tuned to pinpoint individuals with undiagnosed and untreated behavioral health issues and sub-clinical conditions that may be potential barriers to care. In doing so, To Your Health! was able to capture more of the most qualified and eligible program members than would have been possible with other systems. Identification and risk assessment of the appropriate population was an ongoing, monthly process.

In addition to claims-based identification, the program also incorporates other referral-based identification processes through a function called Care Coordination. These elements include provider referrals, plan-based program referrals, and self-referrals.

Engagement – Persistent Pursuit to Engage Members

With the targeted Health Plus population identified, engagement was the next phase of the program for reaching out to eligible members and enrolling them in To Your Health! The success of To Your Health! hinged on meaningful, active engagement and participation, requiring the ability to achieve direct contact with members. A chronically ill Medicaid population is often on the move and their mailing addresses and phone numbers can change frequently, making them difficult to reach through conventional means.

Because this population can be so hard to reach, To Your Health! employed Outreach Coordination, a function of Synergy Connect, which served to extend engagement efforts beyond telephone, mail and email. By having a local presence in the communities, where an on-the-ground outreach coordinator developed relationships with key influencers, such as the health plan, providers, and community-based organizations, To Your Health! created an environment that encouraged active participation and ensured appropriate resources were made available to the members. This effort leveraged physician practices, community health centers, shelters and group homes, and local health plan programs to locate and engage eligible members on a path to better health.

Outreach Coordination		
Coordination Team	Frequency	Purpose
Health Integrated: <ul style="list-style-type: none"> Outreach Coordinators Health Plus: <ul style="list-style-type: none"> Health Services Assoc/Director 	3-5x/week	Coordinating outreach plans for specific member cases.
Health Integrated: <ul style="list-style-type: none"> Outreach Coordinators Health Plus: <ul style="list-style-type: none"> Provider Relations 	Daily	Connect to identify high volume provider offices, gain introductions and build relationships to ensure provider collaboration on engaging and retaining program members.
Health Integrated: <ul style="list-style-type: none"> Outreach Coordinators Health Plus: <ul style="list-style-type: none"> Program Managers & various department members, including provider relations, member services, health services, outreach & education 	Monthly	Coordinate program engagement process, member concerns & trends, provider support & outreach, Health Plus staff updates.
Health Integrated: <ul style="list-style-type: none"> Outreach Coordinators Health Plus: <ul style="list-style-type: none"> Outreach and Health Education teams 	Quarterly	Collaborate on outreach to members who quickly resisted program participation. Find new ways to approach and engage these members.

As part of the engagement process, outreach coordinators regularly worked with Health Plus departments and community resources to identify and improve ways to reach and engage members.

The To Your Health! engagement process was based on consumer-oriented strategies and tactics. This meant executing persistent, iterative communications designed to resonate with each member via multiple modalities including mail, phone, email, interactive and automated voice messaging, and local in-person outreach.

To Your Health! established multiple levels of ongoing interaction designed to capitalize on behavior change and readiness principles, while establishing awareness, affinity, trust and empathy. With this fully organic engagement process that is modified based on member response, Health Integrated typically achieves engagement rates much higher than are seen in the industry. Following this methodology, the To Your Health! program grew to the prescribed participant target early on in its first year.

Connect: Outreach Coordination to Engage Members

During the engagement process, To Your Health! employed a variety of creative tactics to locate and engage eligible members in the program, including Outreach Coordination by program representatives in the field. Given the difficulty of reaching this population, this required the pursuit of all possible avenues of member influence and breaking down potential barriers.

For example, real life instances of To Your Health! Outreach Coordination include:

- ❖ Reaching out to a physician's office to provide program information and ask the physician to refer the member at her next appointment. The member enrolled based on the physician recommendation, program materials she received and immediate outreach coordinator follow up after her appointment.
- ❖ Working with physician's office to confirm the need for Spanish-language specialists to be available for engagement calls. Calls to the member's daughter, who spoke English, ensured the family was clear on the member's care goals and got ideal call back times for a Spanish-speaking engagement specialist to reach the member. An engagement specialist, with clinical background, was able to gain the member's commitment to the program and agreement to work with a care coach.
- ❖ Engaging with Medicaid clinics, that see members on a walk-in basis, to tag member files for outreach and referrals to the To Your Health! program. The outreach coordinator made weekly follow up calls to identify whether eligible members have come in for an appointment and received program information and the referral. The outreach coordinator was able to follow up with a member using the new phone number the member provided to the clinic and enrolled her in the program.

Through Outreach Coordination, members have a better sense of the program and eligible resources, increasing their engagement levels and commitment to actively participate in the program.

Empowerment—Interventions for Both Medical and Psychosocial Issues

Each To Your Health! member was encouraged to work with a Care Coach who is a specially trained, Masters prepared, licensed clinician with expertise in the behavioral sciences and medical health. Once enrolled, the To Your Health! team went to work establishing relationships with program members and using the most up-to-date science on behavior change and a full range of condition-specific assessments, evidence-based guidelines and interventions designed to accelerate each member's ability to understand and improve treatment plan adherence, and ultimately to improve their health status.

Especially critical for this population, however, was the need to assess care gaps, the member's ability to self-manage, and psychosocial issues that may be contributing to inadequate self-management. In some cases this focused on the member's general knowledge level of their condition(s) and communication skills with providers. In others, it was an issue of unifying clinical management support, ensuring quality care and organizing the collaborative efforts of the health plan, provider and community resources available to each member.

Connect: Care Coordination to Overcome Psychosocial Barriers

Through Care Coordination, outreach coordinators work in the field to develop relationships with a variety of community programs and resources to empower members to better health and ensure appropriate resources are made available to the member. These services are a key factor in addressing and removing psychosocial barriers that inhibit the member from improving their health status and staying engaged in the program.

For example, real life instances of To Your Health! Care Coordination include:

- ❖ Arranging meals for a teenage daughter of a hospitalized member through a local Catholic Charities Food Pantry to reduce the member's anxiety during her absence.
- ❖ Referring a disabled member who cared for an elderly relative to the NYC Family Care Giver's Resource Center, alleviating the member from elder care chores that were adversely affecting her recovery.
- ❖ Enrolling a member in a community van ride service to ensure that she was able to get to her doctor appointments regularly and on time.

By addressing these psychosocial barriers, members are able to focus more on the work of taking control of their health and adhering to their treatment plans.

Throughout the program, To Your Health! drew upon Health Integrated's multi-disciplinary team of behavioral health clinicians (LCSW, LMHC, LMFT), medical and psychiatric nurses, internal medicine/family medicine physicians, psychiatrists, and educators to complement the core program content on an individualized basis, as needed. Communication methods included telephonic coach calls, educational information (mailed or emailed), telephonic community resource referral, 24/7 inbound after hours phone line, communications to providers that may include clinical alerts, post assessment updates and peer to peer consultation with a Health Integrated medical director, condition-specific, motivational, support and general health interactive voice messages and other materials and activities to support the member on their way to optimal self-management.

Care Coordination		
Coordination Team	Frequency	Purpose
Health Integrated: <ul style="list-style-type: none"> ▪ Outreach Coordinators, Director of Engagement, Medical team Health Plus: <ul style="list-style-type: none"> ▪ Health Services team 	Monthly	Care Coordination--Review clinical successes, complex cases, case management referrals.
Health Integrated: <ul style="list-style-type: none"> ▪ Outreach Coordinators, Care Coaches Community Resources: <ul style="list-style-type: none"> ▪ Program Representatives 	As Needed	Create workflows for teaching members/practitioners about criteria and process for securing social resources.

To Your Health! bridged potential care gaps on an ongoing basis through regular, coordinated communications between members of the Health Integrated and Health Plus teams as well as practitioners and community resources.

Finally, all of these activities were wrapped with member incentives to encourage continued participation such as prepaid phone cards for members that complete every third care coaching call. Empowering members to be more self-sufficient and aware of their own biopsychosocial barriers and needs was one of the primary program goals. The multidisciplinary approach described here has allowed Health Plus to be extremely successful in equipping members to be more self sufficient and in control of their own health.

Impact: Delivering Meaningful, Measurable and Transparent Results

To ensure complete visibility into program performance on both financial and clinical fronts, Health Plus and Health Integrated held quarterly meetings to review a Value & Impact Statement (VIS).

Quarterly Value & Impact Review		
Health Integrated Team	Health Plus Team	Purpose
<ul style="list-style-type: none"> • Chief Medical Officer • Executive Medical Director • Senior Vice President of Client Services • Director of Engagement • Outreach Coordinator • Senior Account Executives 	<ul style="list-style-type: none"> • Chief Medical Officer • Chief Financial Officer • Medical Directors • Vice President of Health Services • Director & Assoc • Director of Health Services • Director of Outreach & Health Education 	<ul style="list-style-type: none"> • Review Value & Impact Statement • Present Medical Cases

Key members of the program leadership teams from both Health Plus and Health Integrated met quarterly to review progress.

The VIS provided Health Plus with a view into progress and indicators of success of the To Your Health! program. In addition, it highlighted characteristics of the members who made up the To Your Health! population, efforts and performance in engaging these members, and the resulting outcomes - both clinical and financial. Following each VIS presentation, Health Integrated presented two cases to illustrate details on utilization along with member goals and achievements in coaching.

Over the first twelve months of the To Your Health! program, Health Plus achieved significant improvements in utilization metrics. The program targeted areas of concentrated utilization—emergency room visits, frequent hospitalizations, and higher-intensity services—typical for patients with uncontrolled disease states.

The cost reductions in these areas will continue to drive overall healthcare cost reductions as emphasis for care continues to shift toward preventative outpatient utilization, patient education and successful self-monitoring and self-management. Through working with members on treatment plan adherence and encouraging evidence-based guideline adherence, To Your Health! has enhanced quality of care that ultimately translates to a healthier population and lower costs.

Summary

Reaching out and empowering their Medicaid population to take control of their health was an impressive goal for Health Plus. One key to the program's success was the persistent engagement process that included personalized, organic communications and local outreach, which together drove high engagement rates. A second key was the emphasis on psychological, social and physical health, working with the member holistically to address not only their medical health but also the related issues that had been a barrier to their health. As a result, the program drove improved clinical outcomes and lowered the cost of care for their Medicaid members.

Health Plus and Health Integrated continue to identify new opportunities for cost savings and to refine the To Your Health! program to deliver results across more members of the Health Plus population.

“The results of the first year of our To Your Health! program have been outstanding, both clinically and financially. We look forward to expanding the program so that significantly more of our members can leverage Synergy.”

-- Clifford Marbut, MD, Chief Medical Officer, Health Plus



About Health Integrated



Health Integrated is the leading innovation partner for health plans, providing evidence-based solutions to accelerate achievement of health management goals for clinical outcomes, quality measures and cost containment. For more information, visit www.healthintegrated.com.

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