

# UCHealth Earns a Trophy with Patient Estimates Automation

## Background and Challenge

UCHealth was looking to advance its use of Epic's patient estimates functionality to help meet government regulations related to the No Surprises Act and to provide more of its patient population with a cost estimate without manual intervention. UCHealth had already implemented estimates functionality, but the current workflow was manual and didn't leverage Epic's automated options. Moreover, current charge router build prevented the system from producing accurate estimates for certain visits, requiring a complex solution.



- **Organization Type:** Nonprofit, healthcare system
- **Location:** Colorado, Wyoming, and Nebraska
- **Founded:** 2012
- **Beds:** 2,000

## Results

**6000%**

increase in volume of estimates created

**98%**

of scheduled surgical cases have an estimate

**30%**

increase in accuracy for all estimates

## Goals and Solution

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UCHealth engaged Tegria to help with the process of utilizing coverage information to automatically create and finalize estimates without manual intervention, given the engagement timeframe and implementation of the No Surprises Act on January 1, 2022. The first step was an assessment to finalize the specific service lines in scope, balancing system limitations with making the greatest impact to the patient population. After approval of the scope, the execution phase began and focused on three main deliverables:

1. **Update the charge router:** Design a solution to address current build in the charge router which was preventing accurate estimates.
2. **Create estimates and gather data:** Enable system functionality to create pending estimates and provide accuracy data.
3. **Finalize estimates with high accuracy:** Send estimates to patients without manual intervention that meet certain accuracy thresholds.

## Execution

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### Update the charge router

After assessing existing charge router build for routing charges to third parties, Tegria worked with UCHealth to design a solution to route charges differently and remove the build that was negatively impacting accuracy. The solution, a reporting workbench extract, was easier to maintain and aligned the third-party vendors to one method rather than supporting multiple processes. This solution required updates to thousands of orders, departments, and charge records.

### Create estimates and gather data

The first part of estimates automation is to enable the system to create pending estimates not yet available to the patient. The data gathered from pending estimates provided the team with accuracy numbers to drive the decision of what could be automatically finalized. The solution leveraged a link between order records and visit types to create estimates for clinic visits, minimizing the amount of maintenance necessary. Taking existing workflows and billing processes into account, Tegria helped UCHealth design a solution pulling information from various Epic master files and translating it to automatic estimate creation build. By the end of the implementation, the number of estimates created per month increased by 6000 percent and 98 percent of surgical cases created an estimate.

### Finalize estimates with high accuracy

As the team gathered data, we were able to present UCHealth with recommendations regarding levels of accuracy and scope for automatic finalization, which sends the estimate to the patient via MyChart. Tegria designed a process for determining accuracy by various criteria and set accuracy thresholds with input from UCHealth. Not only did the volume of estimates created increase dramatically, but the accuracy rate also increased by more than 30 percent! Without burdening existing staff, UCHealth successfully provided more patients with estimates that were more accurate.

## Outcomes Summary

With the goal of increasing automation as much as possible, the Tegria team worked with UCHHealth to implement a solution for routing radiology charges, designed a low-maintenance estimate creation strategy, and created a roadmap for the future. Working closely with Epic to vet the solutions and discuss feedback for future enhancements, UCHHealth advanced its price transparency and patient estimates goals.

By implementing the new automated functionality, UCHHealth earned an Epic trophy for its Estimates Automation Creation Percentage. It is now one of the leaders in leveraging Epic's automated estimates functionality to deliver accurate price estimates to patients.



We are very pleased with the outcome of our automating patients estimates project that the team at Tegria completed for us. We knew that we needed some additional help to make the kind of significant improvement that we were looking for and the team delivered! We were able to make tremendous progress in a relatively short amount of time. UCHHealth will be able to take the foundation that Tegria put in place for us to continue to automate more of our patient estimates.

—Jenny Eno, Senior Director, Epic Revenue Cycle Applications