

WHITE PAPER

Our Pillars of Excellence

Accordant Care Management



“Companies, like individuals, do not become exceptional by believing they are exceptional but by understanding the ways in which they aren’t exceptional.”

Ed Catmull

Founding Member, President,
Pixar¹

Patients, plan members, providers, and plan sponsors rely on Accordant for quality care delivered by a team of dedicated, skilled professionals with many years of experience. Our aim is to always meet the highest standards of care and to ensure we do so through a process of ongoing improvement.

From June to December 2018, Accordant leaders embarked on an organization-wide effort to identify our successes, strengths, and opportunities for improvement based on the principles set forth in *Teaching Clinical Reasoning*, a part of the ACP Teaching Medicine Series.

We then implemented a series of projects and initiatives throughout 2019 under the *Pillars of Excellence* framework anchored in the principles and recommendations within *Teaching Clinical Reasoning*. The goals were to achieve exceptional clinical and operational excellence by applying what we know and have learned to be best practices.

We are committed to providing members the most optimized care possible. One way we can do this is by helping our colleagues be the best they can be by enhancing their personal self-worth, pride in their work, and their commitment to do more.

In this white paper, we outline some of the projects we undertook to ensure we were delivering the highest quality of care to members and the improvements achieved as a result of each initiative.

Andrew Krueger, M.D.

Senior Medical Director,
Accordant Health Services

Pillars of Excellence



GOALS

Increase a sense of ownership, critical thinking, and clinical reasoning:

- Clinical expertise
- Recruit and retain talent
- Culture
- Professional development

Fulfill obligations to members and clients:

- Engagement expertise
- Enhanced outcomes
- Primary nurse

To reinvigorate and refine Accordant colleagues' commitment to those they serve, one another, and the organization, Chief Nursing Officer, Angela Inman, and Senior Medical Director, Andrew Krueger, M.D., identified the key elements of a vibrant and productive organization. They hoped to create an environment in which colleagues took accountability for the work they did and how it was delivered. They began by discussing values and purpose, and how those concepts might impact colleagues across Accordant.

Accordant leaders identified the Pillars of Excellence, which would be their guide for project selection and implementation priorities. These are discussed in more detail later in this white paper.

With the pillars identified, they mapped out a multiyear plan to implement the project. Since trying to forcefully change a culture usually leads to resistance, they focused instead on open dialogue, obtaining buy-in from organizational leaders and colleagues, and building from the ground up. Through conversations with colleagues across the organization, it quickly became apparent that providing the highest level of care to members and doing so through a *Pillars of Excellence* model was a shared commitment. This project wouldn't have been possible without a great deal of commitment from colleagues throughout Accordant. *Pillars of Excellence* became the centering concept that bound together all projects and initiatives launched in 2019.



"Our aspiration was to nurture an environment where we own what we do and how we deliver care."

Angela Inman

Chief Nursing Officer,
Accordant Health Services

Culture



GOAL

Create a Culture of Excellence:

- Align all colleagues around a common purpose of creating a culture of excellence
- Encourage and emphasize accountability toward that purpose

During March 2019, Accordant leaders held several ‘fireside chats’ with colleagues about creating a Culture of Excellence and introducing the *Pillars of Excellence*. These discussions — deliberately restricted to small groups of 15 to 20 colleagues — set the stage for upcoming projects, discussions, and initiatives to establish a Culture of Excellence.

During the discussions colleagues primarily reflected on two topics:

- Which of their work experiences helped them feel the most engaged and fulfilled
- How they connected what they did on a daily basis to the purpose of Accordant and CVS Health — helping people on their path to better health

Before meeting other colleagues, leaders — including directors, senior managers, managers, and supervisors — had discussions among themselves to ensure that they understood the intent behind creating a Culture of Excellence.



In all, 429 colleagues participated in 29 sessions that were supplemented with a series of videos and blogs.

Participants watched two pre-recorded videos — one from Senior Managing Director, Stephen Gaddis, and another from Senior Medical Director, Andrew Krueger, M.D. — that emphasized the importance of culture and their contribution to it. One internal blog was shared to kick start the conversations. Another one was written after the sessions to reinforce the central message.

“If you have purpose, you indeed look for what you can bring to the table every minute of the day. I read a long time ago that a goal is what you hope to get, but a purpose is what you give. After many years at Accordant, I can honestly say at this moment in time, the culture is indeed excellent and I am grateful for that.”

Susan Malloy

Senior Nurse Case Management,
Accordant Health Services

Quarterly Culture Conversations

Accordant leaders scheduled quarterly culture conversations beginning the second quarter of 2019, informed by monthly dialogues with about 100 to 150 colleagues. Emphasizing individual accountability and contribution to the organizational culture, these interactive webinars featured a variety of activities and discussions. The topics included:

QUARTER 2: **Jaws of Culture**



The *Jaws of Culture* course is an interactive, remote learning experience that focuses on the dynamics of organizational culture. Participants learn how their thoughts, words, and actions can impact the development of a culture, as well as the importance of leadership in developing the desired culture. Participants also learn about principles of change management and explore ways they would initiate and implement change.

QUARTER 3: **Energy + Mood Elevator**



Energy, like culture and leadership, is subjective but powerful — we can feel it in a group, and it affects performance. In this course, participants learn how to manage their energy and how being attentive to their moods and emotions can help them do their best thinking. They also learn how their energy (their inner feelings) impacts their performance. In addition, they learn how to determine where they are on the ‘mood elevator’ and what they can do to bring out their best thinking and efforts.

QUARTER 4: **Power of Thought + Separate Realities**



We are not aware of the majority of the thoughts we have, yet they affect every moment of our lives. In this interactive webinar, participants learn how our thought habits affect our behaviors, our interactions with one another, and subsequently, how they affect the organizational culture we all create. In addition, the webinar outlines how the way we perceive and interpret the world around us reveals some of our blind spots and selective perception. Participants learn about the power of thought, the filters they use to perceive and interpret events, and the separate realities we experience. They learn how to appreciate and leverage this diversity of thought and experience to contribute to a Culture of Excellence.

With a baseline of data established in 2018, Accordant leaders also tracked key colleague engagement measurements each quarter. They used the Likert scale, which includes metrics such as:

- ✓ I have been adequately trained to do my job
- ✓ I have sufficient access to development opportunities
- ✓ I am given a real opportunity to improve my skills at CVS Health

They added a fourth metric during the third quarter to verify that the culture conversations were fulfilling their intended purpose:

- ✓ This session helped me understand how I can contribute and impact our culture

After outlining the core values that support a Culture of Excellence, Accordant leaders wanted to hear their employees' perceptions. They created several channels for employees to connect and communicate their ideas.



Accordant Shark Tank – Making an Innovative Splash

Recognizing that colleagues inside the organization can inspire new ideas as much as outsiders, company leaders launched Accordant Shark Tank. They encouraged all colleagues, regardless of position, team or department, to share their ideas through a SharePoint form with:

- A detailed description of the improvement idea
- Justification
 - Why is the improvement/change needed?
- Impact of change
 - Who will be affected by the change?
 - How could the impact of the change be measured?
- Possible resources needed to implement the change

Submitters were given an opportunity to present and justify their ideas to the selection committee via Webex. After reviewing the 32 improvement ideas received, the committee picked four projects that moved to the final phase. The final winner was 'PODcastPlus' by Colleen Brown, Senior Advisor, Medical Writer, and Lauri Stash, Senior Advisor, Medical Writer. They proposed an ongoing podcast series that would discuss a broad range of topics, including breaking medical news, emerging clinical trends, team member profiles, and clinical issues that nurses encounter. Their plans include interviewing experts from various medical fields such as nurses, doctors, managers, and pharmacists.



Program Excellence Blog

Accordant leaders created a Program Excellence Blog to provide an additional channel to explain critical ideas behind the *Pillars of Excellence*. Besides senior leaders, several line-level colleagues wrote blog posts and shared their perspectives and experiences. In 2019, 12 authors wrote 15 blog posts.

Colleagues were encouraged to leave comments on blog posts and submit ideas for a post by using the Program Excellence Blog submission form. Accordant also tracked the usage report via SharePoint to measure participation and engagement. For example, they monitored the click-through rate and found an average of 15 percent (N = ~420).



Popular blog topics included:

- Depression as a comorbidity
- Managing and accepting change
- Owning your career
- Empathy
- Communicating effectively with members
- Positive impact of Accordant programs

Clinical Expertise



GOAL

Equip nurses with clinical skills and knowledge they need to provide patient-centered care.

Accordant leaders have created several opportunities for nurses to enhance their clinical reasoning and critical thinking skills. These include:



Medical Advisory Board Referral(s)

Accordant nurses can request assistance from members of the Medical Advisory Board that comprises physicians who specialize in AccordantRare conditions. In 2019, Accordant launched an initiative to help the nurses improve their critical thinking and clinical reasoning utilizing a process they were already familiar with.

In formulating a case for physician review, the nurse is expected to drill down to key clinical elements and provide pertinent facts including what they believe to be the next steps in supporting the member's care. The Medical Advisory Board (MAB) case submission process was utilized as the vehicle to practice these skills.

In conjunction with the Quality and Education Teams, case scenarios were provided to each disease-specific pod. The nurses were asked to use their expertise to create and submit a case — with a synopsis of pertinent clinical facts, their concerns, questions, and thoughts — to the MAB for review. The Senior Medical Director and Quality Team developed a quality assessment tool to evaluate the submissions by the nurses and provide feedback. The findings were compared to MAB submissions from the first quarter of 2019, which was used as a baseline.



Mock MABs and training boosted nurses' performance ratings on a range of metrics — symptom assessment, treatment efficacy and comorbidity factors.

To build an environment that would encourage nurses to refine their critical thinking and clinical reasoning skills and grow professionally, they did the following:

- ✓ Created a new MAB module to explain the importance, process, and benefits of MAB referrals and distributed it via LEARNet. After training all the existing nurses on the new module, it was added to the standard onboarding process for all the new nurses.
- ✓ During the second quarter, had all the nurses complete a mock MAB, based on a challenging case they had previously experienced. The Quality Team reviewed all the required MAB information captured in a SharePoint Nintex form and provided feedback to the submitter.
- ✓ During the third quarter, had the Quality Team provide the nurses a vignette to complete a second mock MAB. Nurses completed it using the previously created SharePoint Nintex form and the Quality Team shared their feedback.

Accordant found that training and mock MABs boosted nurses' performance ratings on a range of metrics — symptom assessment, treatment efficacy, comorbidity factors, and the overall average score.

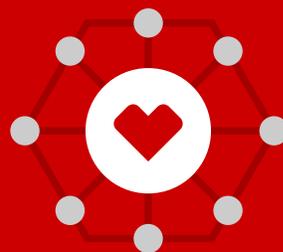


POD Meetings

To refine nurses' clinical expertise, the Accordant Quality Team facilitated two meetings during the fourth quarter of 2019, with each of the six nursing pods, grouped by the conditions on which they are focused. The idea was to create educational resources and build a learning environment where all nurses, regardless of their level of expertise, could interact and deliberately practice together.

The pod meetings provided an open forum for nurses to share experiences, ask questions, and practice their clinical reasoning skills. For example, nurses were presented a case study and then encouraged to think critically and answer questions related to the case. They were also given an opportunity to present possible solutions to member difficulties and learn from each other. In addition, nurses learned about the clinical rationale and importance of assessment questions. The sessions ended with instructions on how to access and leverage available resources.

The pod meetings provided an open forum for nurses to share experiences, ask questions, and practice their clinical reasoning skills.



Engagement Expertise



GOAL

Prepare Enrollment Associates (EAs) to drive recruitment and increase engagement in clinical programs.

To support and develop EAs, Accordant leaders have launched several programs:

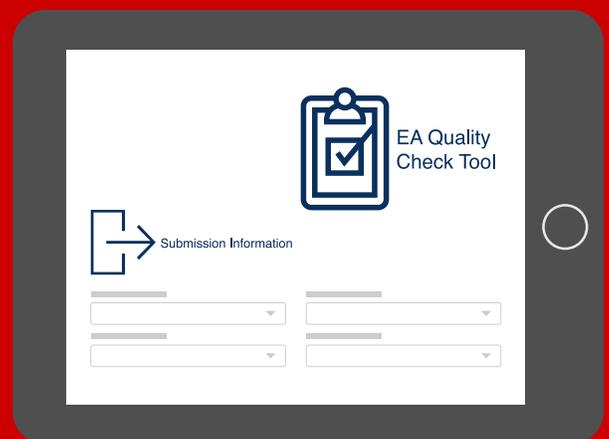


EA Orientation

After reviewing the existing EA orientation experience, the Education Team made several strategic changes to the orientation program:

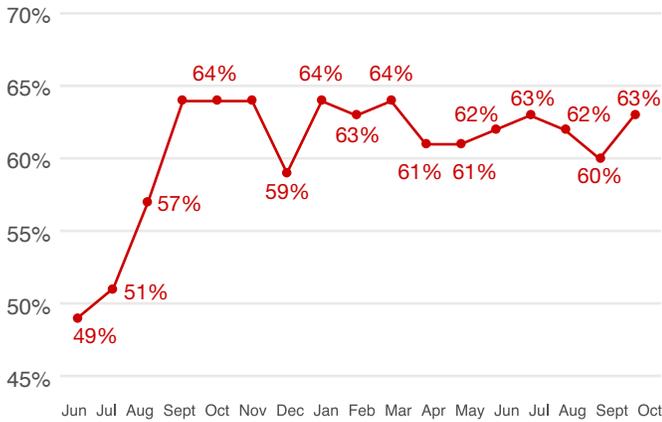
- ✓ Increased duration of training from two to three weeks, giving EAs an additional week to practice enrollment calls
- ✓ Implemented scripted role playing with supervisors and quality auditors

- ✓ Developed a Quality Review Tool in SharePoint to allow supervisors and auditors to score new colleagues' calls and provide immediate feedback
- ✓ Created an EA Progress Form tool in SharePoint to allow operational supervisors, preceptors, quality auditors, and training colleagues to track the progress of new colleagues

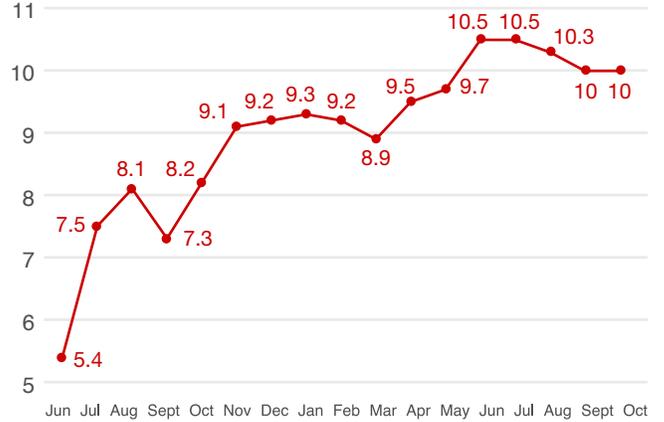


EA orientation also brought focus on the ‘sales’ aspect of the role and provided new colleagues with tools and techniques to be more persuasive over the phone.

CONTACT EFFECTIVENESS



CONTACT EFFICIENCY



Awareness Month | Our Value

A May 2019 survey of Accordant EAs and their leaders identified the top two focus areas:

- ✓ Making a compelling case for Accordant programs
- ✓ Responding to members’ concerns and objections

The project team declared September ‘Awareness Month’ and launched several programs and activities to emphasize the value of Accordant programs, including weekly communications and videos (such as [When Cathy Met Bonnie](#)) and trivia questions with prizes.

After the event, EAs were polled to evaluate if it helped them appreciate the value of Accordant programs. The survey revealed that nearly 67 percent ‘strongly agreed’ or ‘agreed’ that they better understood the programs’ value. The same percentage of participants responded they ‘strongly agree’ or ‘agree’ that they better understood their role in fulfilling CVS Health’s purpose of helping people on their path to better health.



~67%

of participants agreed that they better understood the programs’ value and their role in helping others on their path to better health.

Primary Nurse Model



GOAL

Strengthen the primary nurse model to build a better bond and trust with patients and caregivers.

To support the primary nurse model, Accordant leaders conducted an assessment.

In place for more than 20 years, the primary nurse model is an important part of Accordant's success. A review of the model was conducted in 2019 to assess its current implementation and effectiveness and to analyze and fill gaps identified during the assessment. Evaluation was done using the situation, background, assessment, recommendation (SBAR) technique. Feedback was gathered from supervisors and managers to further understand the current state and challenges of the model.

Here are the challenges that were identified and how the team addressed them:

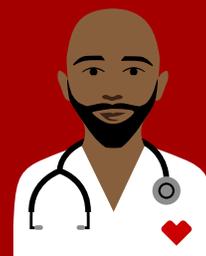
✓ **Reliable Assignment Reporting/Monitoring**

One of the biggest challenges was a lack of reliable reporting to easily monitor the shifting of nurse assignments when nurses joined or left a team or when they had license limitations. To improve how cases were assigned to nurses, Accordant developed a colleague tracker. It ensures that the nurse is in the right disease pod, has appropriate licensure, and has the capacity to take an additional member based on caseload parameters. To improve it further, the case assignment process is being streamlined, including the development of an enhanced case assignment tool.

✓ **Outbound Calling Capability**

The inbound call model also had a few challenges. For example, members didn't have the option to electronically schedule calls with their assigned nurse. A dialer — which enables additional calls for members and schedule these calls at a time the primary nurse is available to interact with them — is already being implemented. It is expected to be rolled out in the third quarter of 2020.

The primary nurse model has been an important part of Accordant's success for more than 20 years.



Professional Development



GOAL

Create training programs and learning resources to help Accordant colleagues achieve their highest potential.

To help Accordant colleagues achieve their highest potential, Accordant leadership reviewed development and learning programs.

Building a Comprehensive Program

Accordant's Professional Development Team supports several *Pillars of Excellence*, including Clinical Expertise, Culture, and Recruitment and Retention.

To build a comprehensive professional development and learning program, education leaders and project team members reviewed the existing training content and curriculum of orientation for EAs and nurses. Leaders also evaluated Education Team members' learning methodology, training styles, and techniques.

Based on their suggestions, the orientation program for EAs has already been modified. A mentoring program for clinicians is scheduled to be implemented in 2020. In addition, they outlined how to more effectively measure the impact of training through a nurse call audit process. They also proposed several changes in the training content and curriculum for nurses including:

- More robust training to help nurses assess members over the phone
- Develop more case studies
- Enhance interactive lesson plans
- Improve preceptor checklists and materials

Accordant's recent training and professional development programs include:



Monthly Webinars

The monthly webinar series presents dynamic discussions and practical tips for professional development to all Accordant colleagues from the comfort of their regular workspace. The webinars are voluntary and open to all colleagues. The 2019 Webinars included:

- Colleague and Career Development
- Developing Through Competencies
- Emotional Intelligence – Why it Matters
- Thriving in a Remote Environment
- Time and Task Management
- The Art of Communication



Foundations for Leading and Learning

To align Accordant leaders with the CVS leadership competencies, a session of Foundations for Leading and Learning (FLL) was facilitated in August 2019. Leaders attended the session that covered topics such as time management, delegation, giving feedback, and coaching.

Leaders established learning goals focusing on at least three topics and worked with their direct supervisors to implement those goals.



Measures of Success

The education department and its operational leaders recognize that they need to measure the success of their training program.

They identified two key indicators they will use to gauge the performance of curriculum changes to be implemented in 2020:

- Knowledge exam scores
- Quality audit scores

Long-term key indicators include admittance to hospitals.



Preceptor Checklist

The precepting experience is critical to successfully onboard a new nurse. This is because most nurses are transitioning from a more traditional health care setting, such as a hospital or health care clinic. The preceptor plays an extremely important role in helping the new nurse adapt to the new telephonic environment. After completing their classroom training, nurses are paired with a preceptor who helps them learn and perform their day-to-day functions.

To provide a consistent experience to all participants, Accordant has created a preceptor checklist to assess and evaluate the skills and knowledge of both new and existing preceptors. The checklist also helps the Quality Team to determine the individual strengths of preceptors and match them with assignments best suited to their proficiencies.

Participants get an opportunity to provide their feedback via a colleague survey after 90 days of employment.

The four pillars of Accordant's Professional Development:

- Clinical Expertise
- Culture
- Recruitment
- Retention

Recruitment and Retention



GOAL

Recruit and retain talent by:

- Selecting the right candidate for the right role
- Creating a strong onboarding and retention process

To identify the best ways to recruit, welcome, and retain new talent, Accordant leaders launched several key projects:



Nurse Interview Form

After taking a hard look at the talent selection process, Accordant leaders refined the process, beginning with the role of the Health Management Nurse.

They began by refining the characteristics needed to succeed in the role. They then selected a subset of behavior-based interview questions to discover and evaluate candidates for the characteristics required for the role.

Candidates are now assessed based on how they would handle a specific situation based on their experience. The questions include:

- Tell me about a time that you had to adapt to a new role or a new culture.
What did you do? What was the result?
- Tell me about a time when you sought out a new challenge at work.
Why did you choose that challenge? What did you learn?
- How have you created or contributed to an environment of accountability with your team?
What were the key actions that you took? What was the result?

After the interview, they capture the candidate's information and assign them a score. They use the following scale to rank candidates: 0 = insufficient evidence, 1 = little evidence, 2 = some evidence, 3 = strong evidence.

Based on these scores, the interviewer makes one of the following official recommendations: strongly recommend, recommend moving forward, recommend with reservations, or do not recommend moving forward. This process makes it much easier to compare candidates and select the best person.

They are now expanding the program to use the same methodology to recruit EAs, using different questions relevant to the position.



Accordant Onboarding Leadership Toolkit

Accordant has created an Onboarding Leadership toolkit to standardize the communication process with new colleagues. It provides insights into the importance of onboarding and developing relationships between new employees and their leaders. It also lays out the best practices to create an effective onboarding process.

A project team of supervisors and managers from operational teams as well as representatives from precepting and training groups identified ways to improve the onboarding program. They designed an onboarding toolkit to ensure consistent communication cadence.

The toolkit provides leaders and managers with email templates and guidance on how to communicate and engage with new hires. It also offers external resources with best practices for onboarding new hires.

The toolkit is now operational and all leaders have been trained to implement it.



New Colleague Hub

Recognizing that retaining talent is as important as hiring, Accordant created a New Colleague Hub in SharePoint. The hub will be used to:

- ✓ Provide a centralized place for new colleagues to learn about each department within Accordant
- ✓ Acculturate and socialize new colleagues
- ✓ Share Accordant's purpose and mission

The hub can give new employees a virtual tour of CVS Health. It offers an easy way to navigate the organizational chart and understand where each person fits into the overall organization.

The hub also provides information on each Accordant department along with a list of its main functions and senior leaders. New hires can also get basic but useful information such as how to find information technology (IT) help or phone numbers for different colleagues and departments.

The hub also gives new employees an opportunity to introduce themselves to their colleagues and tools to build connections, such as a map highlighting every person's hometown. The hub even has tools and tips to ease the onboarding process, from helping new hires update their online profiles, to explaining why and how to use webcams in what is often a remote working environment.

"The first three to six months — when new hires are particularly susceptible to turnover — are most critical. On average, companies lose 17 percent of their new hires during the first three months."

Harvard Business Review (2017, June 20)

Enhanced Outcomes



GOAL

Combine and streamline data from disparate reports into a centralized dashboard to help improve clinical outcomes.

Recognizing the need for more centralized and easily accessible performance metrics, Accordant leaders initiated several significant projects to combine and streamline existing reports into a common resource.

More than 65 data fields were used to create a dashboard that streamlines existing reports into an easily accessible and understandable format. It centralizes multiple views of clinical metric data to assist clinical operations leaders. The project was divided into two phases:

- PHASE 1:** Launched in October 2019, the first phase involved gathering data from existing but scattered reports into one user-friendly interface. Accordant leaders now use the tool to oversee key clinical metrics.
- PHASE 2:** As part of Phase 2, now underway, they plan to centralize clinical quality data by nurse pod, team, and line of business within the dashboard. They are also building a Colleague Tracker, aimed to be a single source of information throughout all systems. Additional reports being developed by Operations will also migrate to the dashboard during this phase.



More than 65 data fields were combined to create a dashboard that streamlines existing reports into an easily accessible and understandable format.



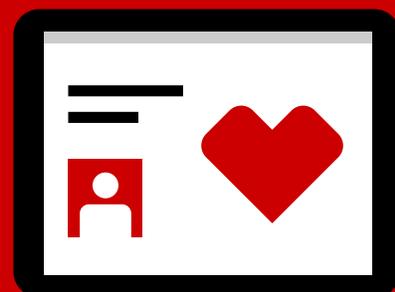
Enhanced Nurse Dashboard

To provide nurses with a view of the clinical outcomes they generate, Accordant now plans to create an enhanced nurse dashboard within the electronic medical record for quick access and ease of use. These views would provide additional autonomy to nurses to better manage their caseloads and prioritize their outreach to individuals with gaps in care. This helps reduce the risk for unnecessary emergency room visits and hospitalization, and enables more effective management of an individual's medical condition. The dashboard also provides visibility into utilization and which members need to be contacted because they have Healthcare Effectiveness Data and Information Set (HEDIS) gaps.

The project has already been approved as a capital budget initiative and is being deployed in five phases.

- PHASE 1: In April 2020, the dashboard began providing clinical metrics views within the electronic medical record (Epic) at the nurse caseload level and manager level. Nurses and managers can now easily spot missed metrics without the need to conduct a case-by-case review. This also increases the ease with which the nurse can prioritize risk and determine the level of intervention needed.
- PHASES 2 AND 3: In May 2020, the project added visibility into MAB referrals, submissions, and clinical case stories at the nurse caseload and manager level. Key caseload metrics, such as members who had been contacted in a particular quarter, and the status of HEDIS gaps at the caseload level, help nurses to prioritize and deliver clinical interventions.
- PHASE 4: As of May 2020, assigned nurses were able to view when another nurse supported one of their members — for example, by answering a member's questions after-hours. This notification allows the assigned nurse to evaluate the interaction and determine if they need to take any additional steps. The system can also indicate whether a member's consent to share information is expiring, and what each individual nurse's caseload is, with a bi-directional interaction with the clinical team.
- PHASE 5: Admission utilization views. The admissions data provides the nurse with a quick view of hospital admissions and readmissions of members they are managing. This is another way the dashboard helps bring increased visibility to members' utilization to help nurses prioritize care.

The enhanced dashboard would allow nurses to better manage their caseloads and prioritize their outreach to individuals with gaps in care.



This extensive multiyear program, inspired by *Teaching Clinical Reasoning*, a part of the ACP Teaching Medicine Series, has enabled us to build further on the process of delivering personalized and trusted health care advice to our program members and their caregivers.

Accordant takes great pride in the series of projects and initiatives implemented under the *Pillars of Excellence* framework.



The improvements achieved as a result of these initiatives are helping us deliver the highest quality of care to program participants through the caring support of our specially trained nurse teams and support staff. We will continue to make significant strides toward achieving the goal of Accordant and CVS Health — helping people on their path to better health.

1. Catmull E, Wallace A. *Creativity*, Inc. New York, NY: Random House; 2014.
2. Nurok M, Lee TH. Transforming Culture in Health Care. *The New England Journal of Medicine*. 2019;381(22):2173-2175.

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