

CASE STUDY

How Advocate Aurora Health Standardized Financial Navigation to Improve the Patient Care Journey



TAILORMED

Background

Advocate Aurora Health (AAH) is one of the country's top 12 not-for-profit health systems. AAH is nationally recognized for clinical expertise across the care continuum while leading healthcare transformation to drive value and reimagine the patient experience. AAH's **75,000 team members** serve more than **3 million patients** at **27 hospitals** and **500-plus care sites** in Illinois and Wisconsin.

With core values including excellence, compassion, and respect, AAH is committed to serving diverse populations and expanding access to care. In 2020, the organization contributed \$2.5 billion in charitable care and services to its communities.



3M+
patients



27
hospitals



500+
care sites



75,000+
team members

At a Glance:

CHALLENGE

With rising healthcare costs negatively impacting adherence and treatment outcomes, AAH sought to improve patient access to assistance across the organization.

SOLUTION

Vivor's technology was implemented system-wide to standardize financial navigation across all sites.

RESULTS

\$2M

assistance secured for two-site pilot

\$11M

assistance secured for entire two-state system in two years

Disclaimer: The information in this case study is based on Advocate Aurora Health's experience using the Vivor platform, which was acquired by TailorMed in 2021.

CHALLENGE

Serving All Patients, Regardless of Ability to Pay

The leaders at AAH have long recognized that living up to their mission requires them to serve each patient's unique needs. Given the barriers posed by rising healthcare costs, they understand that patient financial health is critical to that care delivery ethos.

High out-of-pocket costs frequently lead patients to avoid or delay care. Even for those with insurance, the cost burden can leave families in a state of financial hardship or bankruptcy as a result—an effect commonly referred to as “financial toxicity.” Knowing how financial toxicity can negatively impact adherence and health outcomes, AAH set out to improve access to patient financial navigation across the organization.

“Our priority is to take care of all patients, not just those who have the means to seek care. If patients can't afford to follow the protocols their physicians feel are in their best interest, nobody wins.

Whatever we can do to remove those barriers to care is so important, and financial navigation is one of those key pieces.”

Karen Gordon

Vice President, Medical Specialties Service Line

CHALLENGE

Creating an All-Encompassing Approach

Given the system's history of expansion, AAH started from a position where financial navigation was highly variable by site, with many manual and fragmented processes. Lacking a consistent financial navigator role, each hospital was left on its own to create individual workflows and make one-off purchasing decisions for technology—or to deprioritize financial navigation entirely. In order to address financial toxicity more consistently across the system, AAH made the critical first decision to standardize financial navigation across the entire organization.

“We didn’t want each site to have to fight individually to get the resources that we know can help patients. We were looking for a more all-encompassing approach.”

Karen Gordon

Vice President, Medical Specialties Service Line

SOLUTION

Aligning Stakeholders to Champion Action

Karen Gordon, Vice President of AAH's Medical Specialties Service Line, identified key stakeholders to help create and champion a standardization plan across all sites. Participants included navigators who were involved in day-to-day interactions with patients, as well as administrators in charge of budget decisions.

Gordon and her colleagues analyzed the challenges they were experiencing with financial navigation and concluded that a technology platform, available system-wide, could relieve some of the difficulty caused by limited staff.

They presented their business case for standardization to their leadership committee for system and service line initiatives, and the path forward was clear.

“We weren’t able to get more full-time employees, but we were able to convince them that if we moved forward with a single tool that would be used across all our sites, it wouldn’t really matter who used the tool. The fact that such a tool was available was most important.”

Karen Gordon

Vice President, Medical Specialties Service Line

SOLUTION

Choosing the Right Technology Partner

When it came to implementing an enterprise financial assistance platform, AAH's priorities were to improve staff efficiency and provide a better, more consistent patient experience. To select the right technology partner, Gordon and her colleagues approached the vendor selection process from a collaborative starting point.

The Vivor platform, which was later acquired by TailorMed, stood out to the team because of its ability to identify resources without staff having to perform cumbersome online searches.

“We pulled stakeholders together that had different levels of understanding. Together, we developed questions and devised a scoring criteria to help us determine [what we considered to be] the most important aspects of a software solution, and how it would embed into our workflows.”

Karen Gordon

Vice President, Medical Specialties Service Line

SOLUTION

A System-Wide Holistic Approach

The AAH team appreciated the Vivor platform's:

- Foundation **opening alerts**
- Simple but flexible **reporting features**
- Successful track record of **EPIC integrations**
- Ability to meet **IT security** requirements

Unlike alternatives, Vivor didn't just focus on cancer treatment—meaning the health system could offer patients more holistic, coordinated support across medications for other problems like diabetes or heart failure.

“We didn't just want to take one aspect of patients' care. We wanted to look at the whole patient, and this helped us do that,” Gordon said.

“Ultimately, with Vivor's depth and breadth, it was the shining star when it came down to what we wanted to achieve. Everyone unanimously agreed that we needed to do it.”

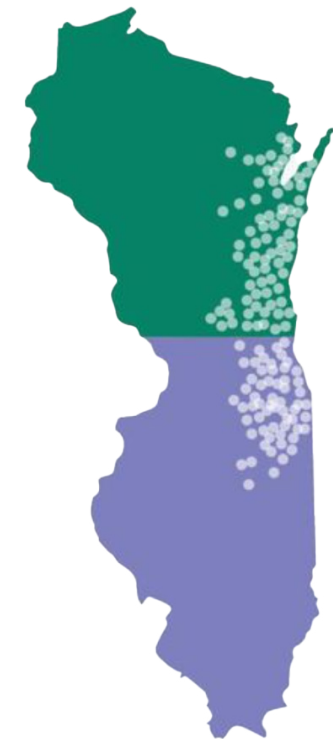
RESULTS

Realizing the Benefits of Standardization

After a successful two-site pilot resulting in roughly \$2M in secured financial assistance, AAH was able to quickly grow. They licensed Vivor, now part of TailorMed, for the entire two-state system. They also expanded to more sites over the following year, increasing secured assistance to over \$11M.

An unexpected benefit was the enthusiasm it generated among the teams using the platform, once they could easily see and compare results by location.

“One of the practice sites even sent out an email because in looking at the dashboard, they noticed that they were number one and were so excited,” Gordon said. “That was probably one of the biggest wins for us—just to see that pride and excitement in helping more patients.”



Advocate Aurora Health
Illinois & Wisconsin

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LOOKING AHEAD

Taking Standardization to the Next Level

AAH and Vivor continue to collaborate on configuring the technology in ways that put their patients first: exploring new workflow integrations, creating custom dashboards, and training new users on best practices. They plan to broaden their data integrations with Vivor and further expand to the remaining sites not yet live on the platform.

“We’ve pushed each other in terms of where we can go to make the job easier,” Gordon said. “It’s truly been a great partnership.”

In addition, the AAH team has learned some lessons along the way—including the importance of change management. While the technology solved many of their challenges, success wasn’t achieved without collaboration across stakeholders and strong leadership support.

“Everyone should expect to meet some reluctance when championing new ideas. You have to show stakeholders how the new idea can make their lives easier and aim to collect active feedback along the way. You want everyone to feel that we’re all on this journey together, and from our perspective, we were.”

Karen Gordon

Vice President, Medical Specialties Service Line

For more information, contact us at:
contact@tailormed.co
800.910.9801
tailormed.co

About TailorMed

TailorMed offers the nation's largest network of patients, providers, pharmacies, partners, and life science companies focused on ensuring all patients across all medical conditions can afford treatment. Driven by TailorMed's best-in-class platform, network constituents can proactively identify, match, and enroll patients in financial assistance programs to deliver a world-class patient financial experience while reducing the cost of care delivery and increasing revenues. TailorMed's secure, web-based financial assistance solutions are deployed across more than 1,000 sites of care, including Providence Health, UnityPoint Health, Yale-New Haven Health, and Advocate Aurora Health.

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About Advocate Aurora Health

Advocate Aurora Health is one of the 12 largest not-for-profit, integrated health systems in the United States and a leading employer in the Midwest with 75,000 team members, including more than 22,000 nurses and the region's largest employed medical staff and home health organization. Advocate Aurora holds an Aa3 bond rating according to Moody's. A national leader in critical innovation, health outcomes, consumer experience, and value-based care, the system serves nearly 3 million patients annually in Illinois and Wisconsin across more than 500 sites of care. Advocate Aurora is engaged in hundreds of clinical trials and research studies and is nationally recognized for its expertise in cardiology, neuroscience, oncology, and pediatrics. The organization contributed \$2.5 billion in charitable care and services to its communities in 2020. We help people live well. Learn more at advocateaurorahealth.org.

