



Embryo  
Options<sup>SM</sup>

# The complete cryo management solution

## Use case

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How digitalization and automation in cryo management, billing and storage can support clinic growth and free up time for patient care.



CooperSurgical<sup>®</sup>

# Extended fertility cryo journeys lead to cryo storage billing needs

On a global scale, **infertility impacts 15% of couples, totaling 48.5 million individuals**. Fortunately, medical advancements can meet the rising demand for IVF treatment, through more treatment options, including cryopreservation, have extended and increased patient engagement during cryo storage and ongoing billing services.

This use case unpacks some of the challenges fertility clinics and patients experience in cryo storage billing and communication. It explores how new technology and automation within cryo management, such as the **Embryo Options<sup>SM</sup>** platform can help meet these demands, **streamline clinic processes, and free up valuable time for more patient support.**

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# Perspective 1: Embryologist with administrative duties

## Case in point

A woman stored her embryos ten years ago. In the past year, she changed jobs and moved, leading to updates of her home address, phone number, and email. However, she forgot to inform the clinic and her details remain unchanged. The challenge arises **when communication methods prove ineffective due to inaccurate details, requiring embryologists across several clinics to spend a considerable amount of time on administrative tasks such as trying to locate these patients** - time that could be better spent elsewhere.

### Data point

**21%** of clinics rank **time-consuming paperwork and data entry as their biggest challenge in cryo billing.**

**Source:** CooperSurgical global study, 2023

## Analog administrative tasks are time-consuming

Keeping track of patients in fertility clinics poses a significant challenge. In analog systems, patients are responsible for updating their clinic with any changes in personal details, such as addresses, phone numbers, or insurance information. Additionally, patients might overlook the existence of reproductive samples in cryo storage, especially if they discontinued their IVF journey. **Addressing the end of storage options, including donation, can be time-consuming** when dealing with confused or hesitant patients, requiring extensive support or counseling throughout the decision-making process.

Lab tasks face interruptions, as administrative responsibilities may be distributed among embryologists alongside their regular duties. **Manual tasks** such as printing forms, retrieving contact information and preparing envelopes for consent or end of storage forms can take up to 15 minutes for each patient. **Follow-up** is also required to confirm receipt and process the forms. **Printing letters and envelopes** in large quantities and filling them manually **may result in mix-ups**, elevating the risk of breaching data protection laws.

**Care must be taken to ensure all personal information is accurate and current.**

Patient information may end up dispersed across various locations and different individuals with the assumption that accurate information was inputted by everyone involved. This can be frustrating for patients if their requests such as whether to be contacted or not, are not being honored. Therefore, valuable time is spent revisiting details to confirm patient information, personal requests, freeze dates, and end of storage decisions – a task difficult to address with manual systems.

## Enhancing data efficiency with Embryo Options

**Embryo Options streamlines workflow through automated, digital billing and collection processes.** Coupled with reminder systems, not only does it reduce the workload associated with sending out consent forms, but it also ensures the accuracy of all consent forms for a more efficient and error-free administrative process.

For embryologists, **an optimized workflow facilitates uninterrupted processes**, allowing them to focus on their core responsibilities without unnecessary administrative burdens.

**Embryo Options supports increased connectivity inside and outside the clinic.**

The improved electronic management record databases enforce intra-clinic coordination, while prepopulated data eliminates the possibility of transcription errors, and digitally received consent form requests allow the accounts team to promptly send a confirmation email to the patient, ensuring a consistent connection.

**The simplified process and centralized information** eliminate potential confusion and concerns for lab staff and give patients confidence that their personal information and requests are up to date. Furthermore, with a simple click, patients can easily change their preferences and specify their consent to extend or discontinue cryo storage before a certain date.

“ **There is such continuity. I don't have to check paper documents or the clinic's database for notes: all are consolidated on this one site, and everybody associated with it – the clinic, the financial person, and the hospital billing person – can all see the same thing.**”

**Leilani Castleman**

IVF Lab Supervisor at Saint Luke's ART lab

# Perspective 2: Head of a financial department

## Case in point

A fertility clinic observes a notable increase in cryo storage, influenced by recent trends in fertility treatment options. With the availability of genetic testing for IVF treatments, increasingly recommended freeze-all cycles and social freezing, more cryo tanks are needed to handle the increased storage needs, along with more contact with patients for cryo billing and end of storage decisions. Thus, clinics are increasingly faced with **administrative challenges regarding the collection of documents, payments, and obtaining a clear financial overview.**

### Data point

39%

of clinics consider lack of:

- cryo storage billing performance measurements
- financial aspects of cryo operations as key challenges.

Source: CooperSurgical global study, 2023

## Lack of a wholly digital journey

Billing teams often have a system they consider digital, but it may lack true end-to-end digitization since most clinics still include manual components in their processes. **The manual handling of many end of storage forms involves dealing with stacks of patient files, and safe, reliable delivery is not always guaranteed.** There is always uncertainty about whether they might get lost in the mail, potentially breaching data protection laws or encountering other issues.

**Patient consent is required before removing any materials from storage.**

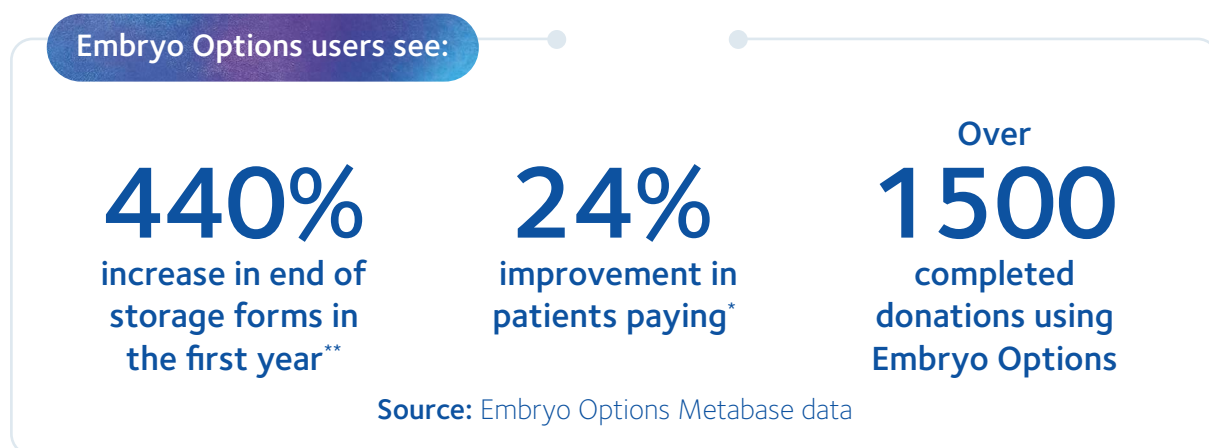
To conserve tank storage, end of storage forms must be sent out routinely when the patient has made their choice, as sample abandonment can greatly impact projected revenue.

In some cases, an investigation will have to be launched to find the patient to obtain their consent. While this happens, cryo storage tank space is taken by patients who, for whatever reason, are not in touch with the clinic and have not relayed their cryo storage decision. If the clinic cannot reach a patient and the storage period is coming to an end, the samples cannot just be discarded.

## Embryo Options helps complete your clinic's digital transformation

Take communication and patient decision-making to the next level with a systematic and timely flow of information between patients and their clinic. **Embryo Options provides well-structured protocols and reminders** so patients receive prompt and informative communication about the status of their specimens, **including extensions, storage expiry, and billing follow-ups**. The prepopulated patient information also significantly reduces the risk of human error in the process.

An analysis of clinics that have used **Embryo Options found a notable and significant increase in the number of returned consent forms** compared to manual distribution methods, conclusively leading to **improved end of storage and collection rates**.\*



For potentially abandoned samples, Embryo Options empowers clinics with comprehensive information gathered through the system to leverage data for skip tracing (limited to the US), helps clinics identify samples, and initiates personalized non-compliance or abandonment protocols when contacting patients. This cryo sample management easily identifies those samples for which patients are not paying for cryo storage or engaging with end of storage decisions. This can help with the workload associated with managing storage expiry limits, free-up valuable tank space, and support due diligence for a more streamlined, resource-efficient clinic.

\*The patient engagement analysis is based on the billings and collections data obtained from a cross-section of centers with greater than 2 years of billing activity. \*\*Calculated looking at all clinics launched with Embryo Options in 2018 and 2019.



“ Another big advantage was the fact that all of the information is prepopulated on the consent forms. So, we’re not having any transcription errors. We’re not having scientists accidentally putting down the wrong freeze dates or the wrong patient IDs.”

**Crystal Goundar**

Embryologist at No.1 Fertility

# Perspective 3:

## Part of administration team in clinic group

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### Case in point

As cryo storage continues, the communication between the fertility clinic administrative team and patients increases. A department that has always had some patient inquiries has now grown substantially due to the many facets of cryo storage documentation.

**From payment details and address changes to questions about end of storage options and documents, both clinic and patient rely heavily on each other for the most correct and up-to-date information.** This requires consistent and streamlined channels of communication.



## Challenging and ongoing patient communication

Despite a clinic's commitment to addressing every patient inquiry as quickly and efficiently as possible, cryo billing has led to a significant increase in patient phone calls and emails, posing challenges for customer service. **The documentation of ongoing communication can be difficult or even nonexistent in the face of such demand.**

Patients, for various reasons, will reach out to their fertility clinic for assistance throughout their IVF journey. **Inquiries into billing questions regarding price, plans, and services have proven to be time-consuming phone calls on both ends.** Patients working nine to five need to carve out time for a quick 10-minute break to contact the clinic. Some clinics that cater to international patients have the added complication of time zone differences.

On the analog side of patient communication, **significant time is needed to personally respond via email to each patient.** Challenges also arise when checking past conversations, as this **information is not always stored in the same place,** and more than one person may have spoken to the patient. Therefore, staff will need to reread details to refresh their understanding of the patient's history.

The billing team faces the intricate task of sending out bills with meticulous coordination to guarantee accuracy and timely delivery. Locating patients with a past due balance involves tracking and identifying individuals within a potentially extensive pool of records. **Today, patients expect access to diverse payment options to conveniently update or change their payment plans.**

Printing end of storage forms leads to considerable paper usage, a practice that doesn't align with today's societal commitment to move towards more sustainable initiatives.

### Data point

**59%** of clinics rank patient communication for storage among their top 3 biggest challenges.

Source: CooperSurgical global study, 2023

## Embryo Options – a communication partner

**Embryo Options** changes the operational landscape of clinics, **helping them keep better track of patients and manage their contact information more efficiently.** Integrated with electronic medical record (EMR) software, clinics can neatly organize and store all patient documentation for increased efficiency in patient-tracking and inventory data management.

With periodic clinic information updates, **Embryo Options simplifies communication by sending detailed email blasts to all relevant patients.** This ensures **transparency, minimizes printing, and promotes sustainability** while delivering timely and comprehensive information to empower patients to make informed decisions in response to any adjustments.

**Embryo Options also improves patient convenience with document signing.** DocuSign eliminates the risk of forms lost in the mail, and patients can easily download necessary documents whenever needed. It validates a patient's identity so they can remotely complete and sign forms, which are promptly received by clinics. For international patients or those who may have traveled long distances for treatment, this is convenient and eliminates the need for clinic visits or involving a notary.

Clinics utilizing the Embryo Options patient portal have **reported 12% increased patient engagement**, accompanied by a **reduction in phone calls**, as email communication proves to be more effective.† Overall, Embryo Options contributes to **a more patient-friendly communication experience.**

“ I think the ability for patients to manage their disposition status themselves is very valuable. They don't have to speak to a scientist or directly to the clinic regarding their wishes. They just log on to their portal, they click the link that says thaw and discard and that directs them straight to a consent form.”

**Crystal Goundar**

Embryologist at No.1 Fertility

†The patient engagement analysis is based on the billings and collections data obtained from a cross-section of centers with greater than 2 years of billing activity.

# Perspective 4: Embryologist & Lab Manager in hospital

## Case in point

An embryologist who also has lab management duties in a fertility clinic takes on a dual role. They have the technical bench work and simultaneously lab management responsibilities that can encompass administrative tasks like ordering, purchasing, and budgeting, along with training and scheduling personnel. **Without the right tools for financial reporting and gaining a quick overview, these tasks can become unnecessarily labor-intensive.**

## Paper trail complicates financial transparency

The Lab Manager's responsibilities include specific financial reporting tasks, requiring a monthly commitment of ideally one to two hours to efficiently compile the charge list, identify billing recipients, and plan for subsequent follow-up tasks.

For clinics, clinic groups, or hospitals, **where paper documentation is the norm, a lack of billing transparency can emerge.** Without a clear overview, confusion among stakeholders, including clinic staff, financial personnel, and hospital billing administrators, may delay payments, which can significantly impact an organization's financial health.



## Everything in one place – the complete solution

**Embryo Options offers a secure platform for the streamlined sharing of essential document consent among staff.** It encompasses all necessary information, from patient demographics to storage status in order to facilitate **real-time and up-to-date collaboration** between the lab and billing for prompt decision-making without the need for multiple verifications.

In financial reporting and analytics, **Embryo Options provides easy access to comprehensive reports**, including valuable monthly summaries to guide financial performance, and the convenient export of data to Excel enhances a clinic's ability to analyze and present information clearly.

For embryologists, Embryo Options contributes to **increased efficiency by enabling effective time division** between work responsibilities and patient treatment-focused conversations. This reduces their involvement in billing communications, streamlining workflows, and optimizing overall productivity within the clinic.

“**Embryo Options communicates with the patient. If there's a past due balance, we skip trace and try to locate patients. With end of storage decisions, it closes accounts. All that this platform can do for storage billing, it is just amazing. It has helped so much getting end of storage decisions and collection rates up. It has helped immensely.**”

### **Paulette Leverett**

Operations Specialist, Ovation Fertility

# Perspective 5:

## Embryo Options patient

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### Case in point


An IVF patient takes the initiative to actively seek information online and delve into resources to learn about their treatment options. They have a strong wish to increase their awareness and empower themselves for more autonomy in their IVF journey, including cryo storage and end of storage decisions. **However, clinics may not have the capacity or ability to meet these emotional demands of their patients.**

### Complex decisions create more patient vulnerabilities

Some emotional aspects, specifically **end of storage**, and what to do with remaining embryos can be particularly **distressing and difficult decisions for patients**. This emotional vulnerability is heightened when patients are required to communicate with different staff members over the phone and via email.

With access to online information, there is a growing trend for patients to take more ownership of their decisions. They may request time to review their notes to contemplate embryo donation or explore options for long-term storage. This inclination towards informed decision-making is further emphasized by the preference for choosing the time and place that suits them, rather than being confined to standard clinic opening hours.

The complexity of information and legal intricacies associated with embryo end of storage decisions add another layer of frustration for patients. **Inadequate clinic communication, lack of inventory visibility, documentation, and consent challenges** collectively contribute to **an overwhelming experience for patients.**



## Embryo Options is there for your patients

**Embryo Options transforms patient communication and engagement.** Patients can manage their documentation processes independently by simply logging onto the platform. The **easy account registration** opens up the convenience of **24/7 billing history**, access to **diverse payment options**, and **transparent billing plans** for a seamless experience.

Informed decision-making, direct patient portal access to educational materials and information **eliminates the need for follow-ups** and allows patients to sign consent forms in Embryo Options via DocuSign independently at any time. For patients traveling long distances for treatment, DocuSign eliminates the need for clinic visits or notary involvement in signature and document witnessing.

Patient mental health should always be a priority. **Embryo Options minimizes the need for patients to repeatedly recount their concerns to different staff members**, which can be distressing. Ultimately, patients can have a greater sense of control and autonomy over their healthcare decisions.

“ I think it’s just the ease of being able to pay your storage bill. I’m continuously getting communication about when my bill is due or if it’s past due. Then I can take action: to pay, to store for another year or to sign consent forms to enable me to discard or donate. I can do that and I don’t need to contact the clinic. So that’s helpful. I think it’s just the ease of making a decision and making it happen.”

**Laura Muri**

Embryo Options user, now CooperSurgical employee\*

# Take your cryo management to the next level

Explore the benefits of digital cryo billing with Embryo Options, your complete solution for improved cryo inventory management and billing that connects and empowers clinics and patients for a more seamless cryopreservation journey.

We think **cryo billing**, so you can think **patient care**

## Improve clinic workflow and efficiency

- Digitalized and automated billing and collection processes
- Prepopulated patient data
- Real-time collaboration between lab and billing

## Strengthen front-and back-end clinic communication

- Electronic management record database
- Secure platform for document sharing
- Skip tracing (U.S. only) and non-compliance procedures

## Support patient experience and convenience

- Easy account registration
- Self-service documentation & DocuSign
- Portal access to educational materials
- 24/7 access to transparent billing history with various payment options

## Access to a complete clinic financial overview

- Easy access to comprehensive reports, including monthly summaries.
- Convenient Excel export

Request a demo and learn how Embryo Options can help your workflow.