

Pre-Bill Management Pilot

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Objectives



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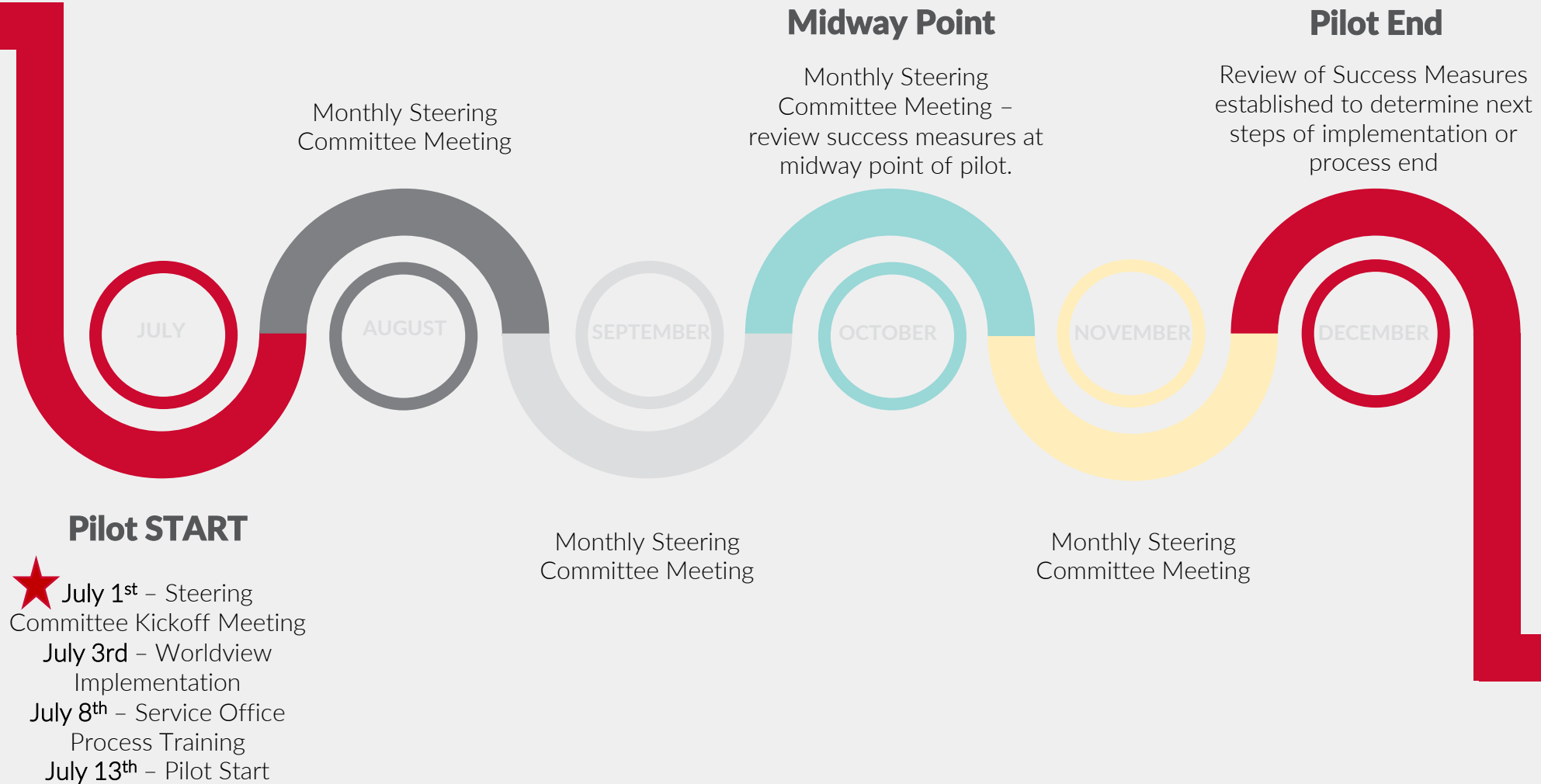
- Pilot metrics overview
- Operationalizing the pre-bill process
- Next steps
- Feedback, questions, concerns

Timeline



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Pre-Pilot



Current State



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The Ocotillo Division comprises 11% of unbilled revenue of the entire practice; their unbilled dollars compared to revenue is higher than practice average.

The process for unbilled management varies across offices and sometimes leads to duplication of work or inefficiencies.

As a result:

- **Financial Impact** - \$2.9MM dollars outstanding
- **Compliance/Regulatory** - 61% of orders are noncompliant
- **Employee Satisfaction** - Managing the unbilled process at the office level is time consuming and difficult to balance with other job responsibilities
- **Operating Model** - There currently isn't a standard operating model for the unbilled process which leads to variation across regions, divisions, and offices
- **Technology** - 2 different technologies (Worldview and HCHB) are being used across the Home Health practice to manage the unbilled process.

FUTURE STATE

Create a standard process for unbilled management that will improve office financial health, increase service office employee satisfaction and adhere to regulatory guidelines surrounding orders and face to face.

FUTURE STATE OBJECTIVES

1

Improve the financial health of the home health practice

2

Increase compliance with to the regulatory guidelines outlined for days to bill for orders

3

Create an operating model that is standardized and scalable across the home health practice

Pre-Bill Pilot Teams

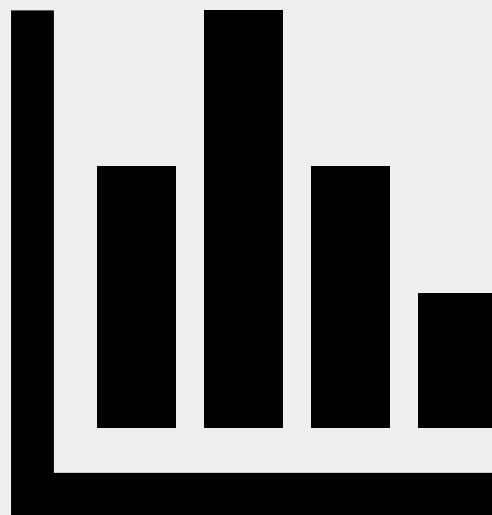


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STEERING COMMITTEE	PROJECT TEAM	SME'S	KEY STAKEHOLDERS
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Redacted			
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|--|--|--|--|
| <ul style="list-style-type: none">• Support, guidance and general oversight of the project.• Meet monthly with Project Team to discuss project progress and milestones. | <ul style="list-style-type: none">• The project team is responsible for the day-to-day functioning of the pilot and working with the other stakeholders providing updates as necessary | <ul style="list-style-type: none">• SME's are consulted on an as needed basis• Sharing best practices and assisting with challenges that the Project Team identifies during pilot | <ul style="list-style-type: none">• Updated on high level milestones, trends and challenges throughout the pilot |
|--|--|--|--|



Key Metrics Overview

Ocotillo Unbilled Dollars



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Days to bill



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Pilot Start	
Days to bill from EOP	61



Operational Changes

Core Services: Processes



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ORDERS

- Management of all outbound orders
- Coordination of sales team involvement to maximize ease of process for referral partners

F2F

- All F2F reviewed within 3 days of SOC
- Qualitative review post CSM initial review
- Coordination of efforts when documentation does not meet minimum standards

CONSENTS

- Management of incoming consents
- Standardized approach to follow up when documentation does not meet standards

WORKFLOW

- Perform claims audit
- Review / held claims

KEY ADDITIONAL FUNCTIONS:

- Timely processing of all unbilled claims
- Maintenance of the overall **process**, team creates **strategies** for improvement and provides **recommendations** to offices based on specific educational needs

Core Service: People



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Pre-Bill Manager:

The Pre-Bill Manager is responsible for oversight of the entire pre-bill process with a focus on minimizing bad debt, write-offs, and reducing days to bill

Key Functions of the Role:

- Diagnosis of key billing issues
- Report weekly actionable items to the service office to solution outstanding issues
- Monitor current state and historical trends
- Report trends to directors / projection on bad debt charges quarterly
- Analyze areas where billing is being delayed and identify educational opportunities for front-end staff



3 Admin Team Members:

The Admin team is a centralized team responsible for completing tasks associated with pre-bill, including order tracking, F2F management, and oversight of consent completion

Key Functions of the Role:

- Team members are trained individuals whose sole responsibility is pre-bill management for designated markets
- Collaboration with team members allows for a holistic approach to all components of pre-bill
- Manage all F2F, orders, and oversee consent completion

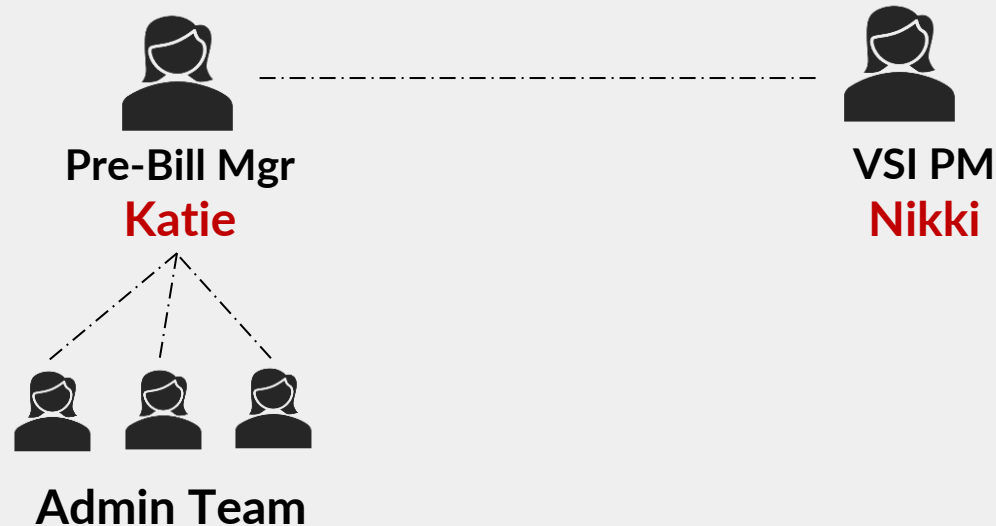
Org Summary



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Transition from pilot to operationalize

- .75 Pre-Bill Manager, 3 Admin Team
- Bring in SVV to follow the service model



Key Questions

- Org Structure – transition reporting to division or maintain at a central support level?
- Payment for Service – how will the cost associated with the service be allocated?

FUTURE STATE: Team Resource Needs



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Billing Manager:

Manages a census of ~2700
Salary \$65,000



Admin Team Member:

Manages a census of ~550
Salary \$45,000

Calla Lily	1.00
Amaryllis	0.75
Ivy	0.50
Peach Blossom	0.50
Moccasin	1.00
Cosmos	0.50
Iris	0.50
Firewheel	0.50
Shooting Star	0.50
Ocotillo	0.75
Camellia	0.50
Bluestar	0.25
Pikake	0.50
Morning Glory	0.25
Lilac	0.25
Bleeding Heart	0.25

Practice 8.50

\$552,500.00

Calla Lily	6
Amaryllis	4
Ivy	2.5
Peach Blossom	3
Moccasin	5.5
Cosmos	2
Iris	2
Firewheel	2
Shooting Star	2
Ocotillo	3
Camellia	1.5
Bluestar	1.5
Pikake	1.5
Morning Glory	2
Lilac	1
Bleeding Heart	0.5

Practice 40

\$1,800,000.00

**Potential FTE:
48.5**

**Potential Total Cost:
\$2,352,500.00**

ROI Summary of Elements



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Cost

- Added FTE Resources to perform the functions
- Technology Resources
 - Goodworks
 - Worldview Implementation
- Supplies for FTE

ROI

- Improvement of Days to Bill
- Improved Bad Debt
- Improved Employee Satisfaction
- Improved compliance (Days to Final)
- Write-Off Avoidance
- Cost for rejected / RTP claims
- CSM job responsibilities – CSM able to manage a higher census

Current State



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Division	Census (Nov 2020)	Current Staff	Model	Notes
Pikake	763		De-centralized	Each office manages their own F2F and orders
Camellia /Ivy	2386	2	Centralized	A fully staffed CAT would include 2 additional FTEs
Firewheel	1094		De-centralized	Each office manages their own F2F and orders
Morning Glory	679	1	Centralized	Centralizes orders management- one CAT member
Calla Lilly	2420	7*	Centralized	*when fully staffed, CAT Team A
Moccasin	1309		Centralized	Cat Team A
Amaryllis	1833	8	Centralized	Cat Team B
Peach Blossom	1423		Centralized	Cat Team B
Ocotillo	1074	3	Centralized	Pre-Bill Pilot Oversight
Lilac	441		De-centralized	
Shooting Star	1114		Centralized	
Bluestar	817		?	
Cosmos	1245		De-centralized	

Core Service Options



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ORDERS

- Order Tracking
- Medical Record Maintenance
- Strategy / Improve Efficiencies
- *Every order will be addressed within compliance requirements (14 days)*

Call in orders by physician ☐ manage all orders for that physician

- Making sure the orders are going to the correct doctor
- Maintaining and correcting physician information (fax/phone number)
- Identifying and maintaining physicians preferred method of order delivery

F2F

- *All F2F will be reviewed within 7 days*
- Billing Team maintains oversight of CSMs portion to ensure clients have required physician visit (will intervene when approaching 30 days to help make decision for appropriate next steps)
- Billing Team has oversight of attestation needed to identify delays collaboration with CM

CONSENTS

- *100% of consents will be reviewed with 7 days*
- If it is not correct we put in a point care alert for the clinician to fix it ☐ there is a form visit on the calendar that will take them directly to the consents
- If not completed within two weeks the Billing Team will connect with the CSM to push through

WORKFLOW

- Outsource of Perform claims audit
- Review / held claims

TECHNOLOGY

- Worldview
- Goodworks



What is the service? Process



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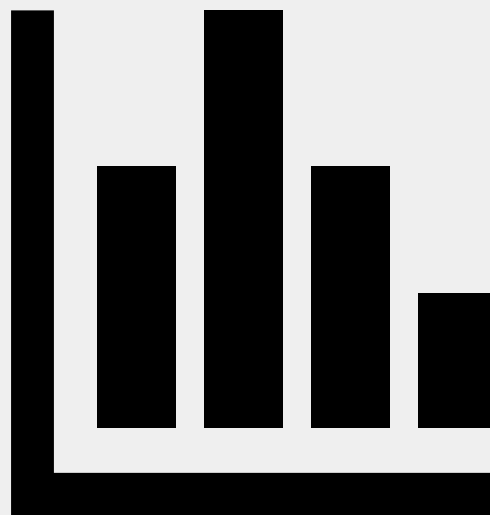
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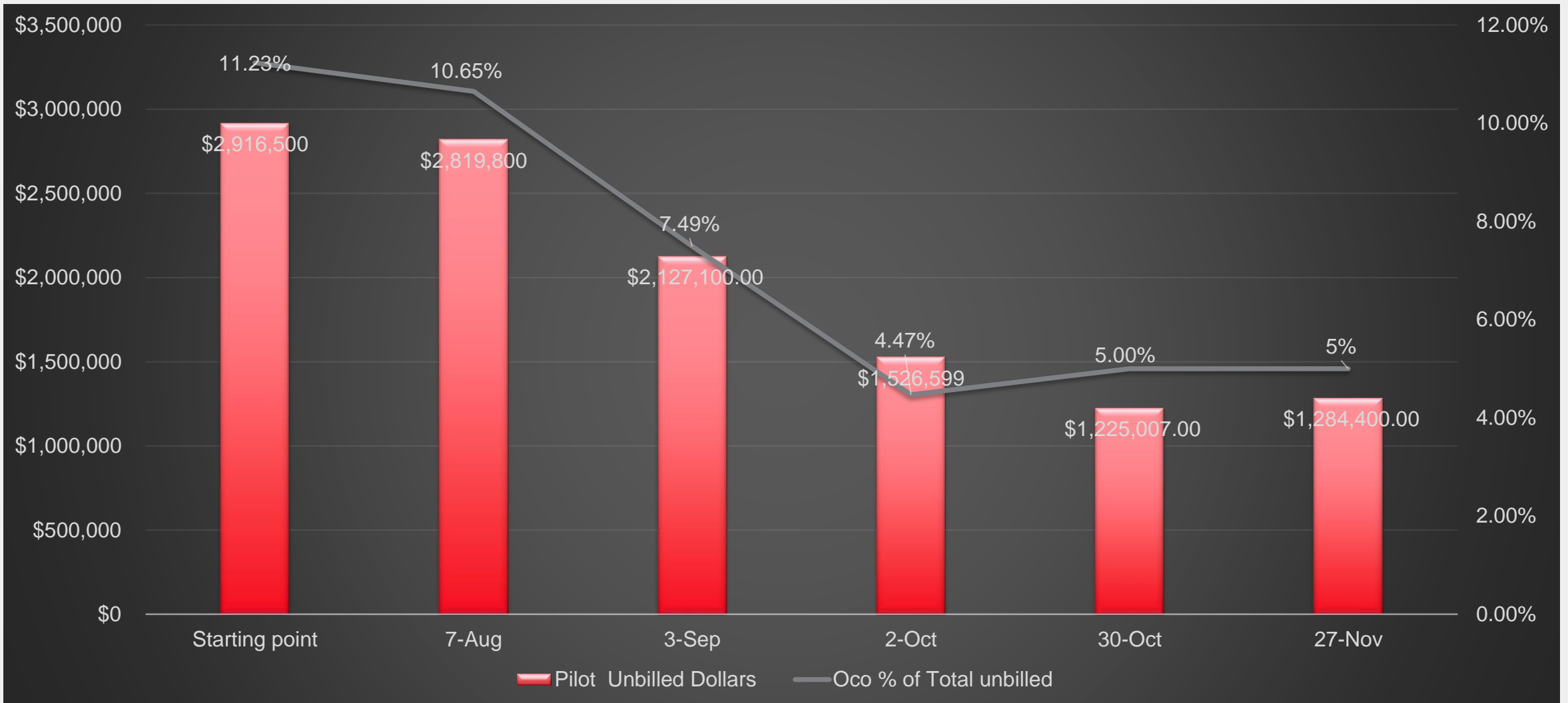


Pilot Initial Results

Ocotillo Unbilled Dollars



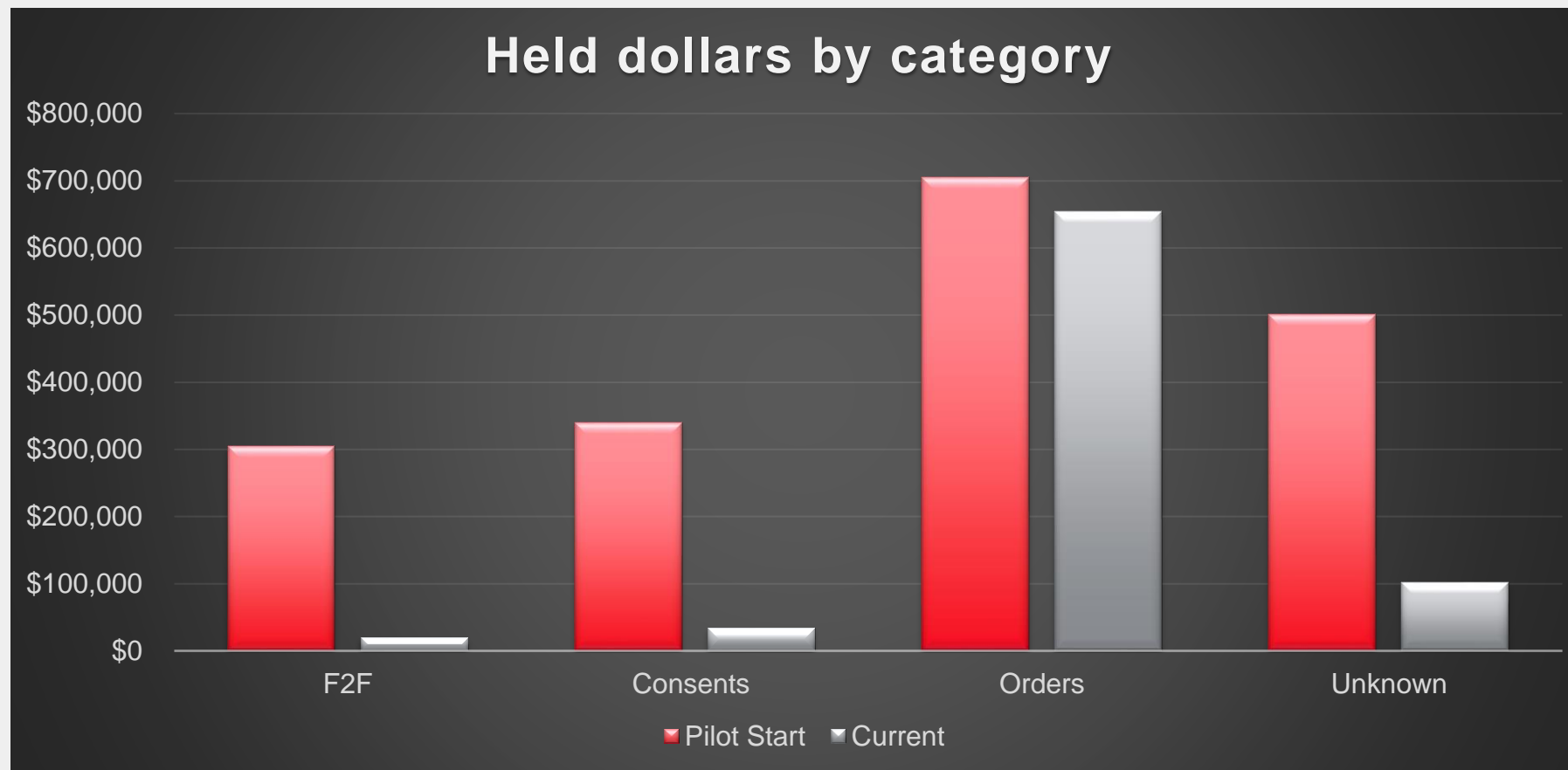
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Ocotillo Unbilled Dollars by category



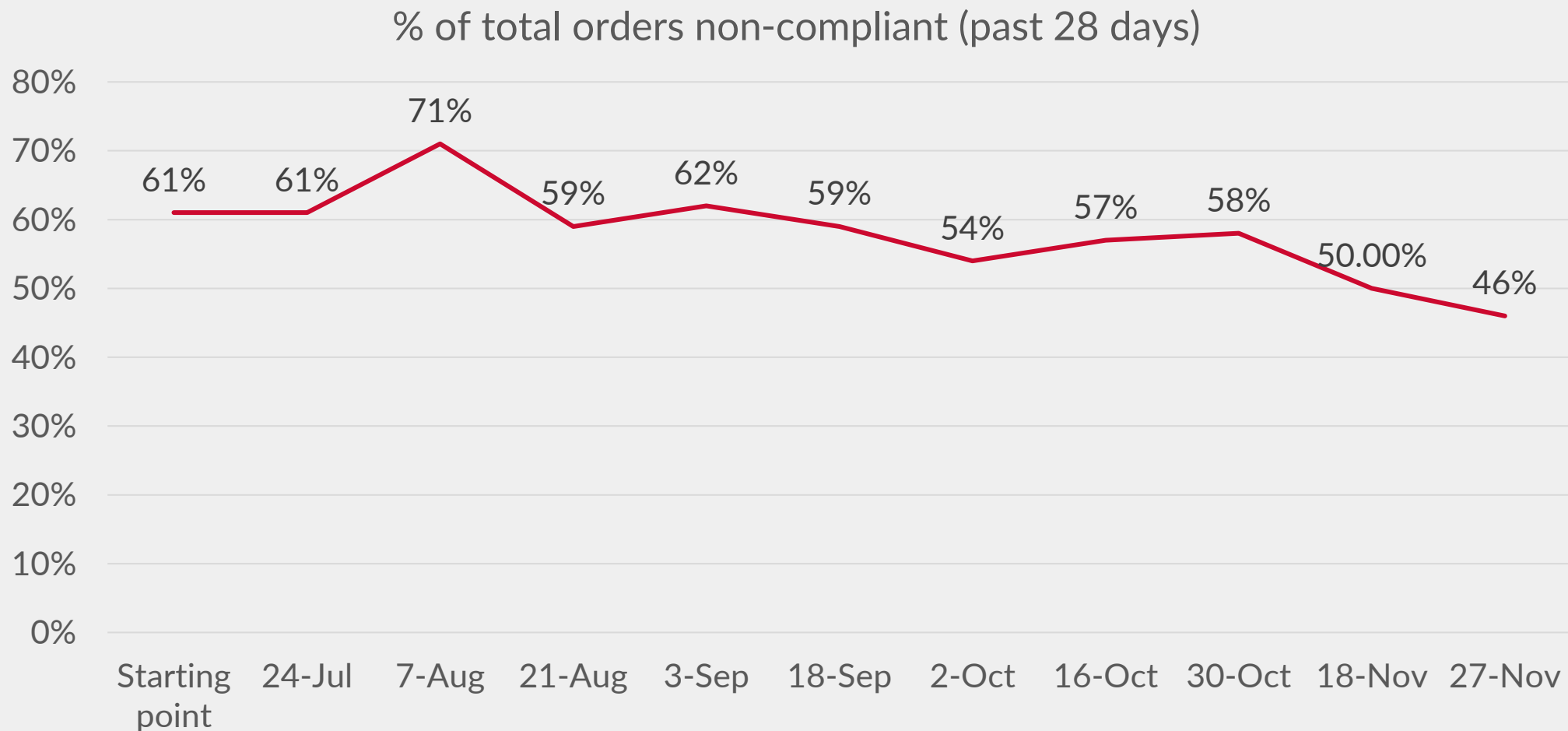
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% Non-Compliant Orders



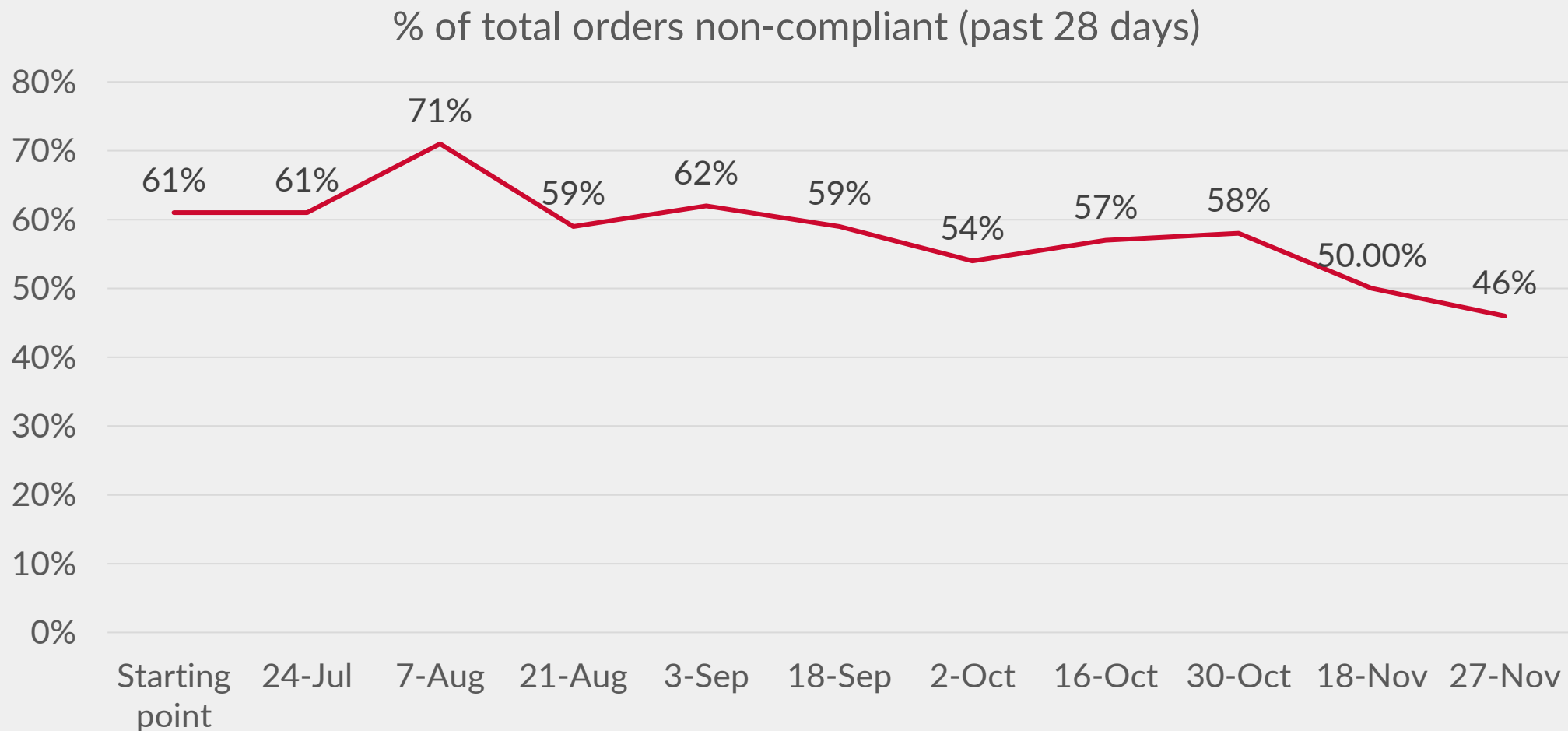
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% Non-Compliant Orders



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Days to bill



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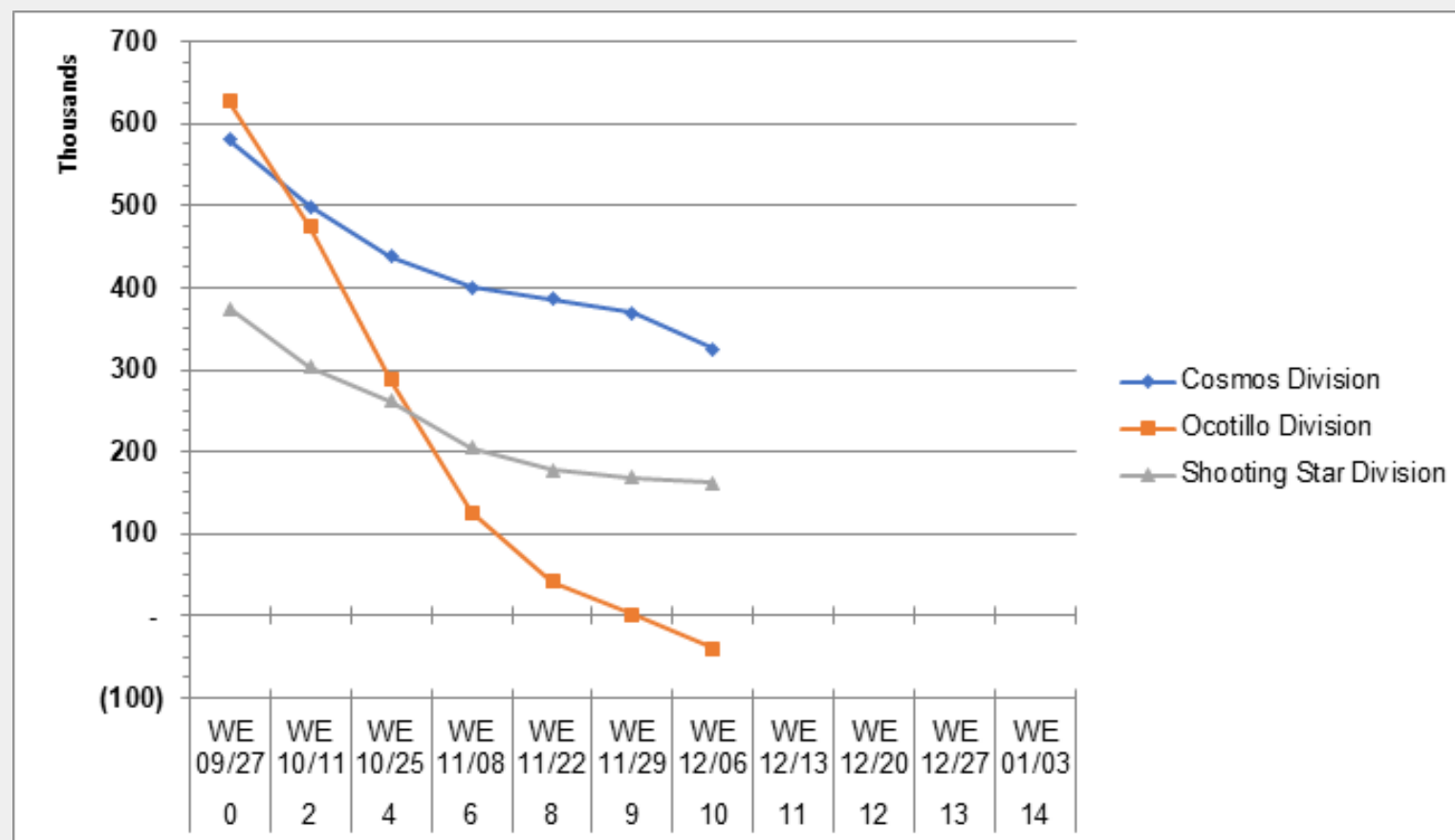
	Pilot Start	Current
Days to bill from EOP	61	41

20 days= \$48,400 over the course of a year

Bad Debt Trending Q42020



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Office Abbrev.	Potential End of 4Q20 Bad Debt Expense	Potential Impact as a % of Revenue
TEV	(21,702.43)	-2.10%
GLV	47,849.73	8.90%
SVV	13,706.81	2.02%
YAV	(8,907.19)	-0.79%
NTV	(32,381.05)	-1.83%
TUF	(38,325.20)	-2.58%