Minimizing Agency Bad Debt Write Offs for Unsigned Orders

Overview

➢ Orders Tracking Obstacles
➢ Inefficient Orders Tracking Processes
➢ Redesigned Processes
➢ Success Achieved by VNA of Greater Philadelphia
Orders Tracking Obstacles

Obstacles

- Physician office follow up lag time
- Refaxing instead of making follow up phone calls
- Orders outstanding for 21 days prior to performing follow up phone call

- Management tracking tools
  - Multiple manual processes utilized to manage department
Obstacles

- Incorrectly Identified Physicians
  - Intake identifying incorrect physician when entering referral
  - Clinician entering a physician not associated with patient’s profile
- Incomplete Orders Populated on Follow up Staff Reports

Obstacles

- Outdated Physician Contact Information
  - Physician table not updated on a regular basis
- Lack of Response from Field Staff
  - Need to hold staff responsible for responding to physician inquiries
Inefficient Orders Tracking Processes

Previously Utilized Processes

- Manual Submission Process
  - Populate fax cover sheets
  - Correlate cover sheets and submitted orders
  - Sort alphabetically and provide to follow up staff
- F2F Team
  - Clinical team member reported to different manager than non-clinical staff
Previously Utilized Processes

- Follow up Strategy
  - Staff receive three separate reports containing orders to perform follow up efforts
  - Reports sorted by outstanding balance, not physician
  - Lack of documentation from follow up calls
  - Performing follow up efforts alphabetically

Redesigned Processes
Redesigned Processes

- Eliminated Extended Follow up Lag Time
  - Follow up phone calls performed on all outstanding orders after seven days
  - Reports sent to management for review twice a week

- Sort Outstanding Orders by Physician
  - Reports received by staff are grouped by physician and then outstanding balance

Redesigned Processes

- Merge Multiple Reports

- Software Utilization
  - Eliminated manual sorting and storing of outstanding orders by utilizing software platform’s outstanding orders search functionality
Redesigned Processes

- Monitoring Staff Productivity
  - Utilized external resource to set achievable productivity metrics
  - Provided additional training on how to achieve productivity goals, and increase quality of follow up efforts
  - Hold staff accountable

Redesigned Processes

- Provide Department Management with Efficient Management Tools
  - Created custom reports to monitor staff productivity
  - Utilized issue tracking system to assign priority resolution
Redesigned Processes

- F2F Team Reporting Relationship
  - Entire F2F team reports to Intake
  - Relocated staff to same office area
  - Leveraged additional clerical staff to assist clinical team lead
    - Follow up phone call to physician within two days of referral

Redesigned Processes

- Documented Process for Identifying the Correct Primary Physician
  - Held Orders Tracking Manager and Patient Care Managers accountable for completing their responsibilities in the process
Redesigned Processes

- Utilized Marketing Liaisons

<table>
<thead>
<tr>
<th>Payor</th>
<th>May 16th</th>
<th>June 15th</th>
<th>Decrease</th>
<th>% Reduction</th>
</tr>
</thead>
<tbody>
<tr>
<td>Managed Care</td>
<td>$65,176</td>
<td>$28,581</td>
<td>$36,595</td>
<td>56%</td>
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<tr>
<td>Medicare</td>
<td>$55,808</td>
<td>$4,659</td>
<td>$51,149</td>
<td>92%</td>
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<tr>
<td>Total</td>
<td>$120,984</td>
<td>$33,240</td>
<td>$87,744</td>
<td>73%</td>
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</table>

# of Physicians | 35 | 16 | 19 | 54%

Redesigned Processes

- Physician Portal
  - Enrolled physician with high amount of outstanding orders on EMR physician portal
  - Follow up with enrolled physician to ensure they review outstanding orders
Redesigned Processes

- Discharge and Missed Visits Order Claim Holds
  - Unsigned discharge orders and all missed visits were setup to hold claims from being submitted
  - Elimination of this process decreased held claims by 4.27%

Redesigned Processes

- Establish Electronic Medical Record
- Inbound/Outbound Faxing
  - Eliminate the need to print orders from software system to fax
- Check in Outstanding Orders Utilizing the Fax Portal
  - Eliminate the need to print signed orders to check in the software system
Success Achieved by VNA of Greater Philadelphia

Accomplishments

<table>
<thead>
<tr>
<th>Payor</th>
<th>May 16th</th>
<th>June 15th</th>
<th>Decrease</th>
<th>% Reduction</th>
</tr>
</thead>
<tbody>
<tr>
<td>Medicare Orders/485s/F2Fs</td>
<td>$176,990</td>
<td>$95,996</td>
<td>$80,994</td>
<td>46%</td>
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<tr>
<td>Managed Care Orders/485s</td>
<td>$207,464</td>
<td>$145,708</td>
<td>$61,756</td>
<td>30%</td>
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<td>Managed Care Orders/485s &gt; 30 Days</td>
<td>$49,827</td>
<td>$38,206</td>
<td>$11,521</td>
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Accomplishments

<table>
<thead>
<tr>
<th>Face to Face</th>
<th>May 14th</th>
<th>June 25th</th>
<th>Decrease</th>
<th>% Reduction</th>
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</thead>
<tbody>
<tr>
<td>Outstanding $</td>
<td>$49,496</td>
<td>$14,171</td>
<td>$35,325</td>
<td>71.4%</td>
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<tr>
<td>Outstanding # of Accounts</td>
<td>29</td>
<td>14</td>
<td>15</td>
<td>51.7%</td>
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</tbody>
</table>

Accomplishments

- Staff Productivity
  - Individual and department productivity numbers increased
    - Receiving assistance from medical records and billing departments as needed
- Employee Satisfaction
  - Total $ held due to outstanding orders goals were established for Medicare and Managed Care
  - Team taken out to lunch if goals are met
Accomplishments

- Department Reports to Controller
  - Allows for better management of outstanding accounts receivable, as controller oversees both billing and orders tracking departments

Contact Info

- Dawn Michelizzi
  - Controller – The Visiting Nurse Association of Greater Philadelphia
  - 215-473-0772

- Mike Freytag
  - Director, Founder – BlackTree Healthcare Consulting
  - 610-536-6005 ext 704