



WORK FROM HOME:

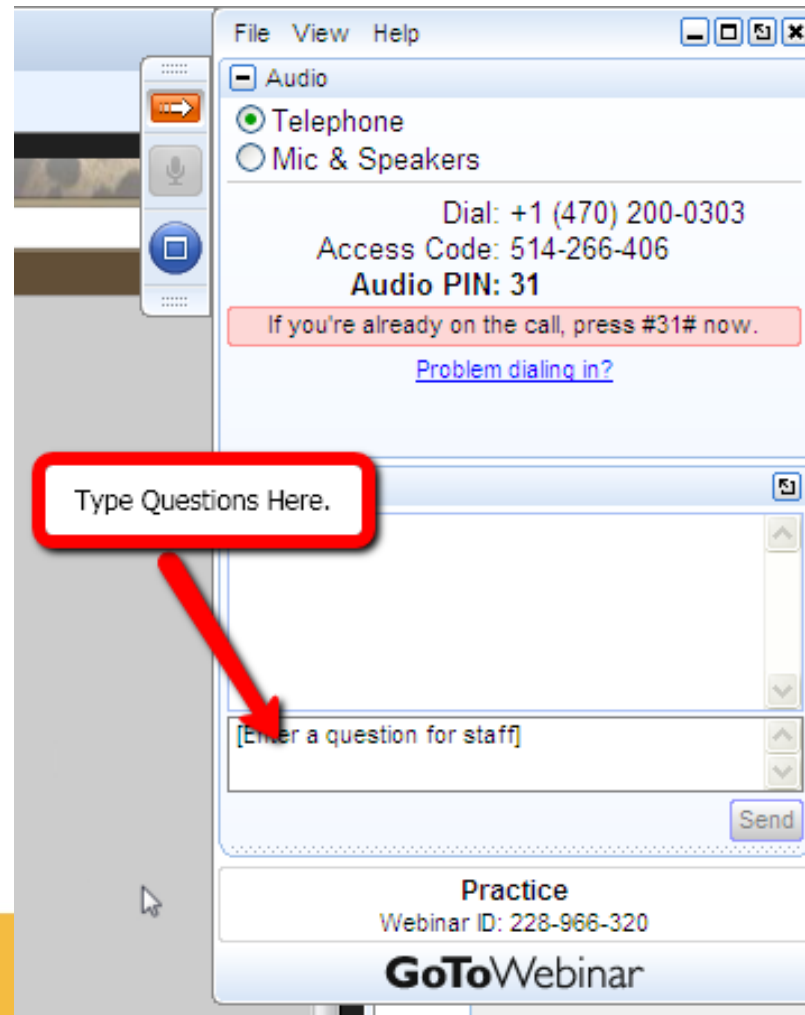
Basics for Managing a Virtual Work Program in the Revenue Cycle

May 31, 2017



Connecting Disconnected Data™

Overview of Webinar Tool



NAHAM: National Association of Healthcare Access Management

- **Certification**
 - CHAM: Management/Director Level
 - CHAA: Front-Line Staff
- **Education**
 - Webinars: Live and On-Demand
- **Resources**
 - Toolkits: Disaster Preparedness, Patient Identity Integrity, Joint Commission, CMS Survey, Patient Experience
 - AccessKeys 3.0
- **NAHAM Members**
 - Over 2,000

Today's Webinar Program

Overview

- Introduction of Speakers
- The Work from Home Series Update
- Texas Health Resources Presentation
- Live Poll Questions During the Webinar
- Q&A



Speaker Introductions



Patti Consolver
Senior Director
Patient Access



Lynn Arrington
Director
Insurance Verification



Alyssa Corallo
Director
Pre-Arrival/Financial
Clearance



Moderator Introduction



Scott Overholt
Chief Marketing Officer
Vyne



Work from Home – The Series

- NAHAM Webinar 1 – October, 2016: Trend Overview
- NAHAM Presentation in Dallas – April, 2017: Thought Leader Panel Discussion
- NAHAM Webinar 2 – May 31, 2017: Basics of a Virtual Work Program in Rev Cycle



Work from Home – The Series

- NAHAM Webinar 1 – October, 2016: Trend Overview
- NAHAM Presentation in Dallas – April, 2017: Thought Leader Panel Discussion
- NAHAM Webinar 2 – May 31, 2017: Basics of a Virtual Work Program in Rev Cycle
- Work from Home White Paper
- Work from Home Case Study
- Work from Home Toolkit
- HFMA Forum Write-up



Work from Home Series – What We've Learned So Far

- 1/3, 1/3, 1/3
- Key drivers are space, costs, disaster planning, employee relations / retention
- Technology makes it possible
- Requirements are a secure, paperless environment – and the software to handle this
- Management tools are needed to monitor compliance and productivity
- Employee satisfaction is raised
- Productivity is higher (and sometime required to be higher)



Work from Home Series – What We've Learned So Far

- Training is critical
- Communication and collaboration is key
- Integration to EHR and other critical systems helps make WFH programs seamless
- Employee recruitment advantage
- Key employee retention is improved



POLL

Does your hospital currently have work from home Revenue Cycle Team(s)?

- Yes, we currently have team(s) working from home
- Yes, we currently have at home teams, **and plan to expand**
- No, but we plan to have at home teams in the future
- No, our **IT department** doesn't support a work from home team
- No, **leadership** doesn't support a work from home team

Texas Health Presents...

“The How-To’s of Managing a Virtual Work Program in the Revenue Cycle”

Patti Consolver, Senior Director

Lynn Arrington, Director, Insurance Verification

Alyssa Corallo, Director, Pre-Arrival/Financial Clearance



Who are we?

25 Acute-care, Transitional, Rehabilitation and Short-stay hospitals that are owned, operated, joint-ventured or affiliated with Texas Health Resources

- 16 acute-care hospitals
- 6 short-stay hospitals
- 1 transitional care hospital
- 2 rehabilitation hospital
- 27 Free Standing Emergency Rooms

69 Outpatient facilities and more than **250** other community access points

More than **3,800** licensed hospital beds (approx. 3,700 operated/available beds)

\$4.6 billion in Total Operating Revenue / **\$6.7** billion in Total Assets

Who are we?

Patient Access Intake Center –

Centralized unit under the Strategic Revenue Services department, which currently preregisters, financially clears, initiates authorization and verifies patient benefits for specific scheduled services.

PAIC 2016 Outcomes

600,000 Calls

29 sec Avg. Hold Time

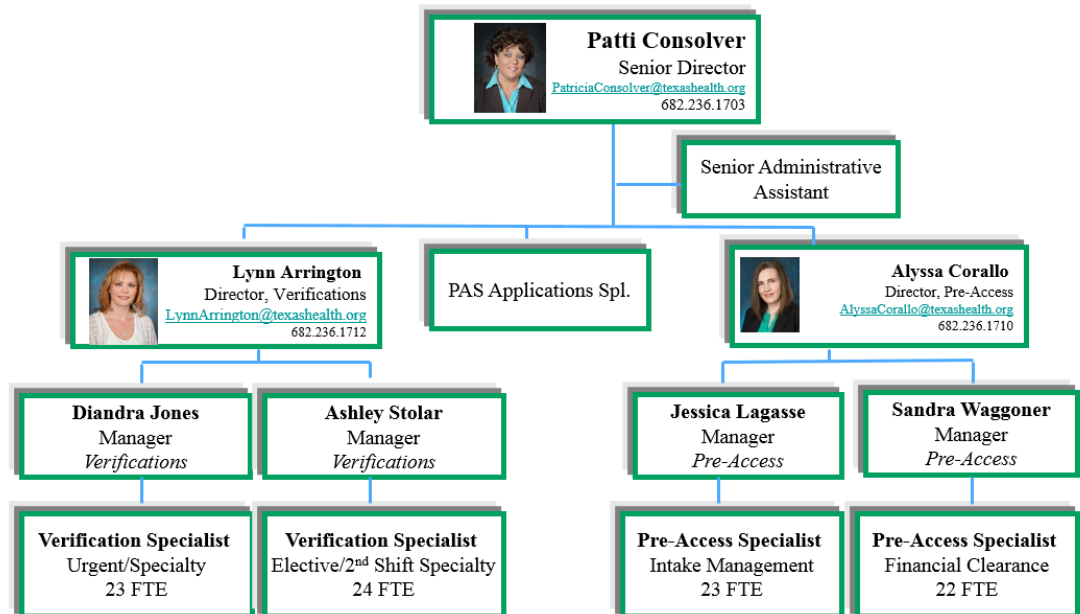
4.5 min Avg. Talk Time

98% Ins. Verification Secure Rate

96% Pre-Reg. Secure Rate

\$1M Monthly Avg. Pre-Service Collections

– **\$11.6M** End of Year



Agenda

- **Technology**
 - Basic Set Up
 - Performing Site Visits
 - Audio recording/QA/Faxing
 - Skype for Business
- **Platforms for Growth**
 - Virtual Coaching/Corrective Actions/Evaluations
 - Virtual KPI's
 - Virtual Staff Meetings
 - Virtual Training
- **Lessons Learned**
 - Constantly Changing
 - Metrics – home vs. office
 - Growth / Timeline
 - Staffing
- **Closing/Questions**

POLL

What are the primary drivers of your interest in a work from home program? (Click all that apply)

- ☐ Office space limitations
- ☐ Employee satisfaction, recruitment and/or retention
- ☐ Improved productivity
- ☐ Disaster planning
- ☐ Other

Technology



"Technology now allows people to connect anytime, anywhere, to anyone in the world, from almost any device. This is dramatically changing the way people work, facilitating 24/7 collaboration with colleagues who are dispersed across time zones, countries, and continents."

MICHAEL DELL
CHAIRMAN & CEO
DELL CORPORATION

Technology Needs

Hardware

All employees utilize a THR Laptop.

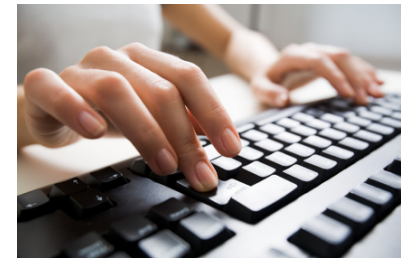
All applications are accessible and fully functional both On-Site and Off-Site via VPN.

On-Site

- Laptop
- Docking Station
- Monitor, Keyboard, Mouse
- Desk Phone
- Access to Office Router

Off-Site

- Laptop
- Laptop Bag
- Laptop Charger
- USB Headset or IP Phone
- Access to Office Router



Technology Needs

Hardware

1. Laptops

Chose 15.6 inch with 10-Key



2. Headsets



Tested various types of headsets.

The chosen headset had a higher quality since the staff spend the majority of their time on the phone.

3. Phones

Supplied with IP Phones/Headsets to take home and connect to home internet router or USB Headsets for the Soft Phone on the laptop.

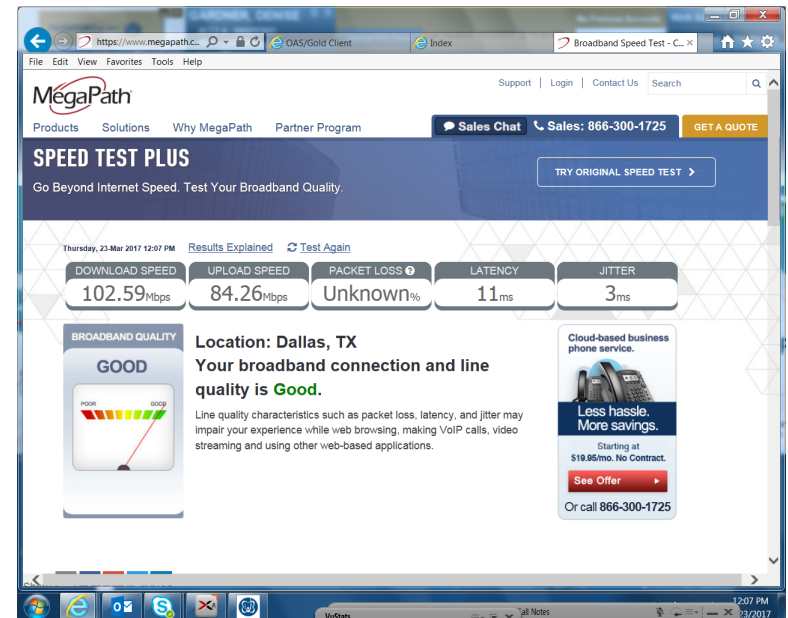
All employees are required to log in with their in-office extensions while teleworking to give the appearance to our customers that they are still in office.



Technology Needs

Internet

1. Staff use their own internet provider
2. Must be able to plug directly into router
3. Provide Internet Speed requirement to all staff
4. Require Upload Speed to be at minimum 4.5 mbps for application functionality and phone quality to mirror in-office
5. Speed is checked with all applications opened
6. Speed test is completed quarterly and kept in employee file



Technology Needs

Audio recording –

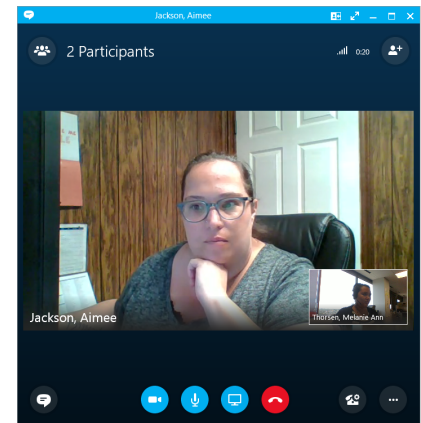
We automatically record calls through seamless integration with our Avaya telephone system. Can index by patient account efficient for retrieval.

Faxing Solution –

We eliminated the need to print, scan and manually fax documents.

The tool automatically captures both inbound and outbound faxes, along with details such as sender/recipient, date/time and proof of receipt.

Faxes are digitized, indexed by patient and available for retrieval and routing.



POLL

In what areas are your existing or planned work from home teams? (click all that apply)

- ☐ Scheduling
- ☐ Pre-registration
- ☐ Authorization / Eligibility
- ☐ Coding
- ☐ Financial counseling

Work Site Visits



Healing Hands. Caring Hearts.™

1. Provide all Employees THR Acceptable Work Space Policy
2. Employee provides pictures of their home work space to management
3. Management does in home/virtual site visits
4. Ensure employee adheres to Policy and is Safe-Guarding Information



Work Site Visits

Worksite Evaluation

Success of a telecommuting arrangement depends on a realistic assessment of the overall safety of an employee's alternate workplace. The checklist lists areas and items that the employee and department manager must inspect before telecommuting begins to ensure the designated workspace is safe, ergonomically suitable, and free from hazards.

Please print clearly and complete all items

Employee Name: _____ Employee ID: _____
 Date of alternate worksite initiation: _____
 Department (Cost Center) Number: _____ Department Name: _____
 Manager: _____
 Worksite location is: _____
 Worksite address: _____ (street, City, Zip)

Briefly describe the designated work area:

General Environment			
Item	Yes	No	If no, remedy
Workstation is arranged to be comfortable without unnecessary strain on back, arms, necks, etc.			
Chair is in good working condition and allows for lumbar support, feet to rest on floor or footrest, 90 degree angle for lower leg and thigh			
Keyboard is in line with forearms when typing and allows arms to be in a neutral position with elbows at sides, with mouse at same level			
Monitor just at or below eye level, directly in front of worker and protected from glare			
Work area is reasonably quiet and free from distractions			
Aisles, doorways, and corners are free from obstructions			

Electrical Safety / Equipment			
Item	Yes	No	If no, remedy
There are enough electrical outlets in the alternate workplace to support the required equipment. All electrical equipment is free of recognized hazards that would cause physical harm (e.g., frayed wires, bare conductors, loose or exposed wires). If necessary, consult with an electrician or power utility company on capacity questions.			
Necessary electrical outlets are three-pronged (grounded).			

Computer equipment is connected to a surge protector. The equipment will be powered down after the work day is over.			
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Privacy and Security			
Item	Yes	No	If no, remedy
Intranet connections are adequate, secure and password protected			
Documents and other work equipment are maintained in a secure area			
There are security controls in place to protect passwords, agency-owned software, and files from unauthorized disclosure.			

Safety			
Item	Yes	No	If no, remedy
There is a fire extinguisher in the alternate workplace and a developed fire evacuation plan in the event of an emergency.			
There is a working smoke detector in the alternate workplace.			
Phone lines, electrical cords, and extension wires are secured underneath a desk or along baseboards			

Attach pictures as supporting evidence of worksite readiness.

I, _____, understand it is my responsibility to maintain the safety and appropriate arrangement of my alternate workplace, if it is my home. I understand if there are significant changes in my work area or space, I must report that to my manager immediately. I certify that my responses to the checklist are true and completed to the best of my knowledge. I understand that any erroneous, misleading, or fraudulent information is sufficient grounds for my preclusion from telecommuting.

Employee Signature _____

_____ Date

Manager Signature _____

_____ Date

THE LANGUAGE USED IN THIS DOCUMENT DOES NOT CREATE AN EMPLOYMENT CONTRACT BETWEEN THE EMPLOYEE AND TEXAS HEALTH. THIS DOCUMENT DOES NOT CREATE ANY CONTRACTUAL RIGHTS OR ENTITLEMENTS. TEXAS HEALTH RESERVES THE RIGHT TO REVISE THE CONTENT OF THIS DOCUMENT, IN WHOLE OR IN PART, NO PROMISES OR ASSURANCES, WHETHER WRITTEN OR ORAL, WHICH ARE CONTRARY TO OR INCONSISTENT WITH THE TERMS OF THIS PARAGRAPH CREATE ANY CONTRACT OF EMPLOYMENT.

POLL

What is your hospital's estimated cost savings per year from work at home programs?

- ☐ \$0
- ☐ \$0 to \$50,000
- ☐ \$50,000 to \$100,000
- ☐ \$100,000 to \$200,000
- ☐ +\$200,000

Platforms for Growth

- Virtual Coaching/Corrective Actions/Evaluations
- Virtual KPI's
- Virtual Staff Meetings
- Virtual Training



Virtual Coaching & Corrective Action

- Set up Coaching Meeting via Phone using Outlook Calendar
- Call is recorded via Auto-Record, indexed and Saved to Employee File
- Email Corrective Action to the employee with a Read Receipt
 - Employee will be required to Electronically Sign and Email back to their Manager

NOTE: Signature indicates that you have read and received a copy of this form and does not necessarily indicate agreement with its contents.

Employee Signature:		Date	
Manager Signature:		Date	3/9/17
Human Resources Signature:		Date	

- HR Requirements
 - Completed timely
 - Develop standardized language “ I have read and understand the contents to this action”
 - Standard language among all PAIC Leadership

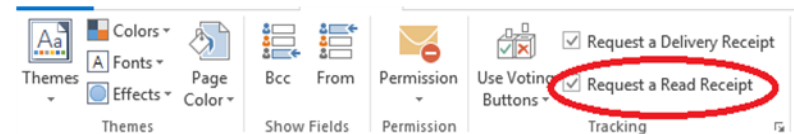
HR Required Attached Acknowledgement Form



By providing your electronic signature on the attached document you are acknowledging that you have read and understand the contents of this written coaching/ corrective action.



Email with Read Receipt Weekly KPI Scores



Virtual KPIs

PAIC TELESWORKING PERFORMANCE TRACKER 2017

Dept	Manager	Name	Teleworking Start Date	# Days/Wk Teleworking	JAN					FEB					MAR				
					1-TLWK Status	1-QR	1-KPI	1-Collec t	1-Atten d	2-TLWK Status	2-QR	2-KPI	2-Collec t	2-Atten d	3-TLWK Status	3-QR	3-KPI	3-Collec t	3-Atten d
InsVer	Ashley			4	YES	2.98	105%		0.0%	YES	3.00	100%		0.0%	YES	2.96	102%		0.0%
InsVer	Ashley			4	yes	2.98	106%		6.5%	YES	2.98	115%		0.0%	YES	2.84	77%		3.2%
InsVer	Ashley				NO					NO		64%		0.0%	NO	2.88	108%		0.0%
InsVer	Ashley		11/1/2016	4	YES	3.00	109%		12.9%	YES	3.00	108%		0.0%	YES	3.00	106%		3.2%
InsVer	Ashley				no					NO		44%		0.0%					
InsVer	Ashley				NO	2.96	103%		0.0%	NO	2.96	95%		0.0%	NO	2.83	106%		0.0%
InsVer	Ashley			4	YES	3	108%		3.7%	YES	3	94%		10.7%	YES	2.91	103%		3.7%
InsVer	Ashley			4	YES	3.00	106%		3.2%	YES	2.95	86%		7.1%	YES	2.97	102%		3.7%
InsVer	Ashley				no					NO		74%		0.0%	NO	2.84	91%		0.0%
InsVer	Ashley			4	yes	3	111%		3.2%	YES	2.95	100%		10.7%	YES	2.97	108%		0.0%
InsVer	Ashley			4	yes	3	109%		0.0%	YES	3	104%		7.1%	YES	2.97	105%		12.9%
InsVer	Ashley		2/25/2016	4	yes	2.98	110%		0.0%	YES	3.00	104%		3.6%	YES	2.94	109%		3.2%
InsVer	Ashley				no		102%		0.0%	NO		105%		0.0%	NO	2.94	110%		0.0%
InsVer	Ashley				no					NO		77%		0.0%	NO	2.88	97%		0.0%
InsVer	Ashley				no					NO		85%		17.3%	NO	2.82	112%		0.0%
InsVer	Ashley				no		84%		0.0%	NO		95%		0.0%	NO	2.94	104%		3.2%
InsVer	Ashley		3/2/2017	4	no	2.98	110%		0.0%	NO	3	104%		10.7%	YES	2.94	112%		0.0%
InsVer	Ashley				no		117%		0.0%	NO	2.95	97%		3.6%	NO	2.88	96%		0.0%
InsVer	Ashley		3/2/2017		no		108%		0.0%	NO		103%		3.6%	YES	2.97	103%		3.2%
InsVer	Ashley		2/23/2016	4	yes	2.94	124%		3.2%	YES	2.98	107%		3.6%	YES	2.91	103%		3.7%
InsVer	Diandra				NO	3.00	113%		3.2%	NO	2.98	102%		0.0%	NO	2.95	108%		6.5%
InsVer	Diandra		3/1/2016	4	YES	2.98	122%		3.2%	YES	2.96	122%		14.3%	NO	3.00	120%		3.7%
InsVer	Diandra		10/1/2015	4	YES	2.98	120%		3.2%	YES	2.98	110%		0.0%	YES	3.00	107%		3.7%
InsVer	Diandra				NO	3.00	121%		0.0%	YES	2.98	111%		3.6%	NO	3.00	116%		0.0%
InsVer	Diandra				no					NO		68%		7.1%	NO	2.96	88%		0.0%
InsVer	Diandra				NO	3.00	116%		0.0%	NO	3.00	117%		0.0%	NO	3.00	124%		0.0%
InsVer	Diandra				no	3.00	105%		0.0%	NO	3.00	105%		3.6%	NO				0.0%
InsVer	Diandra				no	3.00	15%		0.0%	NO	3.00	105%		3.6%	NO				12.9%
InsVer	Diandra		1/1/2016	4	yes	3.00	117%		3.2%	YES	2.98	111%		0.0%	YES	3.00	104%		16.1%
InsVer	Diandra				no					NO		53%		0.0%	NO	2.96	81%		0.0%
InsVer	Diandra				no	3	106%		3.2%	NO	2.98	67%		7.1%	NO	2.78	94%		3.7%
InsVer	Diandra				no	3.00	118%		0.0%	NO	2.97	106%		7.1%	NO	2.84	106%		3.7%
InsVer	Diandra				no	3.00	112%		0.0%	NO	2.98	100%		0.0%	NO	2.93	109%		0.0%

Teleworking Performance Tracker

Sorts the Users into Insurance Verification or Pre-Registration.

Rep's Name

If Rep Teleworks, their Start Date

Days per Week, Rep Teleworks

Telework Status for the Month

= Rep Actively Teleworked

QR Score for that Month

Average KPI Rate for that Month

Amount Collected for the Month

JAN							
Dept	Name	Teleworking Start Date	# Days/Wk Teleworking	1-TLWK Status	1-QR	1-KPI	1-Collect
InsVer							
InsVer							
InsVer		10/1/2015	4	yes	2.64	116%	
InsVer					3.00	113%	
InsVer				yes	3.00	105%	
InsVer		1/1/2016	4	yes	3.00	106%	
InsVer		1/1/2016	4	yes	3.00	118%	
InsVer					3.00	105%	
InsVer							
InsVer							

=Rep's Metric is below the Minimum

Average Monthly QR Score while Rep was In-Office

Average Monthly QR Score while Rep was Teleworking

Average Monthly KPI Rate while Rep was In-Office

Average Monthly KPI Rate while Rep was Teleworking

Average Monthly Collections while Rep was In-Office

Average Monthly Collections while Rep was Teleworking

INDIVIDUAL ANNUAL AVERAGES								
AVERAGE QR Office	AVERAGE QR Teleworking	QR Variance	AVERAGE KPI Office	AVERAGE KPI Teleworking	KPI Variance	AVERAGE Collect Office	AVERAGE Collect Teleworking	Collect Variance
2.95	2.91	-0.05	99%	103%	3%	\$23,334	\$26,275	\$2,940
2.85	2.86	0.01	100%	102%	2%	\$16,702	\$18,395	\$1,692
2.87			93%			\$18,362		
2.86			112%			\$21,920		
2.93	2.90	-0.03	110%	107%	-3%	\$15,861	\$24,148	\$8,287

Variance to see if there was a decrease in Metrics between In-Office and Teleworking

= Decrease in Metric

			JAN			
Name	Teleworking Start Date	# Days/Wk Teleworking	1-TLWK Status	1-QR	1-KPI	1-Collect
Insurance Verification	TELEWORKING			2.96	113%	
Insurance Verification	IN-OFFICE			3.00	118%	
Insurance Verification	ALL			2.97	115%	
Pre-Registration	TELEWORKING			2.89	109%	\$27,258
Pre-Registration	IN-OFFICE			2.88	106%	\$28,626
Pre-Registration	ALL			2.88	107%	\$27,942
Department	TELEWORKING			2.92	111%	
Department	IN-OFFICE			2.94	112%	
Department	ALL			2.93	111%	

Average of Metrics from Staff that Teleworked that Month

Average of Metrics from Staff that were In-Office that Month

Average of Metrics for All Staff that Month

Average of both Insurance Verification and Pre-Registration

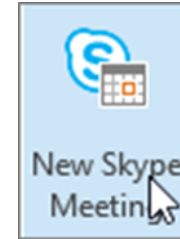
Before Hire Date

FORMULAS USED:
AVERAGE

CONDITIONAL FORMATTING/RULES USED:
If cell contains "yes", turns green
If cell is below metric minimum, (ie For QR, below "2.7"), turns red
If variance is below "0", turns red

Virtual Staff Meetings

1) Schedule Staff Meeting with Skype in Outlook



2) Join Skype meeting from the outlook request

.....
[→ Join Skype Meeting](#)

Join by phone

[682-236-8620](#) (Lync2013ConferencingRegion)

[866-234-7226](#) (Lync2013ConferencingRegion)

[Find a local number](#)

English (United States)

English (United States)

Conference ID: 20328050

[Forgot your dial-in PIN?](#) | [Help](#)
.....



3) You have the option to video conference, phone conference or share your desktop



Additional Skype Features

Features

- Instant messaging
- Voice and video conferencing
- Screen and file sharing
- Whiteboard
- Poll/ survey option

Implementation

- Monthly staff meetings
- Weekly huddles
- Morale activities
- Instant feedback/suggestions

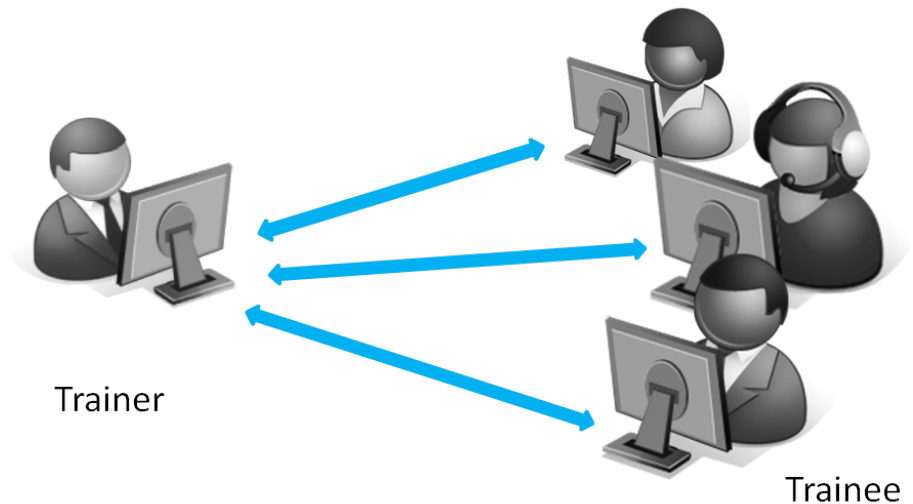
Virtual Training

Features

- To stay compliant with HIPAA regulations, PHI cannot be recorded for training purposes
- Two employees at different locations being able to hear the same phone call in real time

Additional Uses

- Call labs
- Workshops
- Shadowing



POLL

What is your remote team(s) productivity level vs. the in office team(s)?

- 90% to 100%
- 100% to 105%
- 105% to 115%
- 115% to 130%
- +130%

Lessons Learned

Constantly Changing

Metrics – Home vs. Office

Growth / Timeline

Staffing



**ALWAYS
CHANGING**

CHANGE!!



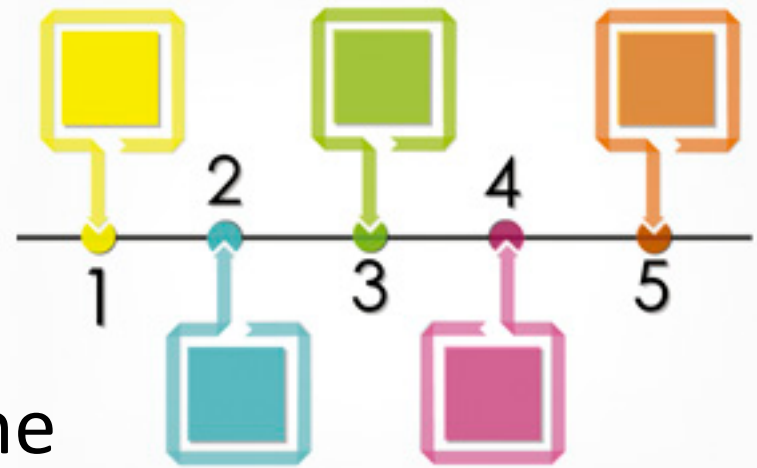
Teleworking Performance Tracker



		AVERAGES											
		JAN				FEB				MAR			
Insurance Verification	TELEWORKING	2.99	111%		3.0%	2.98	107%		4.8%	2.94	106%		6.0%
Insurance Verification	IN-OFFICE	2.99	104%		0.6%	2.98	91%		3.4%	2.91	105%		3.2%
VARIANCE between Teleworking from In-Office		0.00	8%		2.5%	0.00	16%		1.4%	0.03	1%		2.7%
Insurance Verification	ALL	2.99	108%		1.8%	2.98	99%		4.1%	2.93	106%		4.6%
Pre-Registration	TELEWORKING	2.87	106%	\$34,216	2.0%	2.89	107%	\$28,027	1.5%	2.90	110%	\$27,218	4.4%
Pre-Registration	IN-OFFICE	2.72	99%	\$33,480	1.6%	2.73	103%	\$33,035	0.7%	2.86	105%	\$35,369	6.0%
VARIANCE between Teleworking from In-Office		0.15	7%	\$737	0.4%	0.16	3%	-\$5,009	0.8%	0.03	5%	-\$8,151	-1.6%
Pre-Registration	ALL	2.79	102%	\$33,848	1.8%	2.81	105%	\$30,531	1.1%	2.88	108%	\$31,294	5.2%
Department	TELEWORKING	2.93	108%		2.5%	2.94	107%		3.1%	2.92	108%		5.2%
Department	IN-OFFICE	2.86	101%		1.1%	2.86	97%		2.1%	2.89	105%		4.6%
VARIANCE between Teleworking from In-Office		0.07	7%		1.5%	0.08	9%		1.1%	0.03	3%		0.6%
Department	ALL	2.89	105%		1.8%	2.90	102%		2.6%	2.90	107%		4.9%

Timeline – *take it slow*

- IV/PR – differences
- Staffing – not for everyone



POLL

Which c-suite executive was / will be the primary decision maker in the initiative to deploy work from home programs?

- ☐ CIO
- ☐ CFO
- ☐ HR
- ☐ COO
- ☐ Other

Open Discussion

Questions or Comments



Q&A

For more information, email
webinars@vynecorp.com