



Our clients are our top priority. As we move into the 4th quarter, it is essential to implement and follow well-defined best practices. By adhering to specific criteria and completing key tasks, we can ensure the best possible outcomes for our clients.

4th Quarter Best Practices

Critical Focus Daily Tasks

- 🕒 Work all CE'd orders in all work queues first. Focus on orders in **Submission**, **Pending** and **Expiring Auth** work queues, working each queue to completion. When possible, follow up on web-based Pending orders every 3 days.
- 🕒 Ensure all **FAR's** are resolved timely.
- 🕒 Focus on collecting documents timely for submission.
- 🕒 Review every order for Credit Exception opportunity at Submission, at Face to Face / LMN Validation, and/or Pending follow up. Prioritize clients whose OOP and Deductibles have been met. Note the CE potential at the time of C&P in the CE Note Field.
- 🕒 December 1st, begin extra focus to prioritize orders that are in shop with All PO's received, making more frequent attempts to secure what is needed for delivery.

Determining if the Order should be CE'd

All Credit Exceptions for Purchase should be issued prior to **November 27th**.

All client responsibility must be discussed and have payment or agreement to pay prior to issuing a credit exception.

Orders with **unpaid** non-covered items and/or client responsibility above \$1,000 are **not eligible** for CE.

When reviewing for a purchase CE at Submission:

- ✓ Deferral rate of payer <13%
- ✓ Focus on orders that have the 2024 OOP a deductible met.
- ✓ Evaluate orders \$5,000 or greater as a priority.
- ✓ Review equipment shipping deadlines validating availability of EOY receipt and delivery

When approving a CE, enter the note "**Approved CE for purchase for End of Year Delivery Need**" in the Credit Exception Note Field.

Centralized Services - Help

AGS and the Centralized Team will be following up on web-based Pending orders every 3 days.

Centralized Team will prioritize orders that have been CE'd and/or are In Shop in queues daily.

Centralized Team will follow up on all starred orders that have been placed on FAR to ensure timely completion.

As orders are identified in which OOP and deductible have been met, escalate a list of potential orders to CE to Funding Leaders.

