NATIONAL SEATING & MOBILITY

Client Care Case Review

Purpose/Policy Introduction

Dedicated time for teammates to come together and align on key initiatives and discuss challenges with client orders in process that may be delayed and require support. During this time, teammates to brainstorm solutions together and clearly determine and assign action items/next steps to help our clients.

Frequency and Expectations

- Minimum every two weeks
- If all metrics are above goal, option to move call to monthly while maintaining metrics
- Metrics below goal, move to weekly
- Encourage cameras to be on

Participants

- ATP and Funding Specialist are required to attend at all times
  - CSS at Funding/Branch Leader discretion once all Leaders are in agreement
- Funding Leader and Branch Leader required **if**:
  - New FS/ATP partnership, attend for first 4 weeks
  - ATP Approval conversion is below 70% for two consecutive months (Evaluate deferrals)
  - ATP Submissions to goal are below 90% for two consecutive months
  - ATP's Funding DOO is above 70 for two consecutive months; if all teammates are below 70, move to review Funding DOO above 50
  - High-level concerns with service and/or responsiveness for facility and/or personnel

Agenda

- Review outstanding action items identified during previous call to ensure resolution and completion by due date
- Determine new action items identified during call, setting a due date, and assigning responsible party
- Discuss any New Referrals, Facilities and/or Therapists
- Review preferred contact method; communication preferences; doc procurement procedures; and other best practices for teammates, Referrals, Facilities and/or Therapists
- Review deferrals/deferral trends and solutions to decrease deferrals (education, job aid, etc.)
- Discuss and solve any escalated orders due to complaints and concerns from clients and/or clinicians
- Review Aged orders in the **FS/RTS Report** (located in MA > Tools and Reports) to determine action plans
- Review working list of orders that need expedited or are stalled and require additional action to proceed
  - Orders which have no client response and may be cancelled in adherence to order cancellation process
  - Orders in which the equipment selected – in combination with medical need – will not be covered, and may need to be re-evaluated/revised
  - Orders in which client has been admitted to a facility
  - Trends which prevent client orders from moving forward (missing demographics, places of service, documentation delays or insufficiencies with specific clinicians)
- Discuss any payer/process changes that impact client care, equipment selection, and/or documentation requirements
- Share success stories, photos of equipment and/or clients

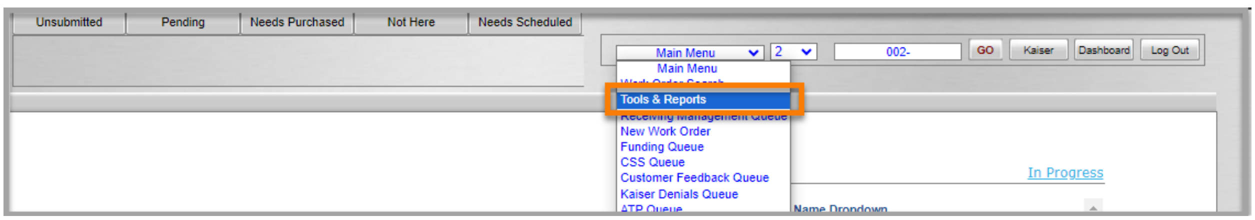
****** During the call make detailed notes in client's orders outlining next steps. Responsible party to enter follow up notes directly in the client's order once action has been taken.******

Post call- Follow through

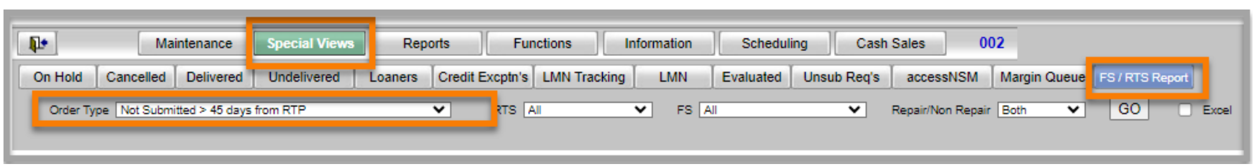
- Take action to resolve items identified and discussed during call, ensuring completion prior to next meeting and clearly document within the work order. Be prepared to share an update during next meeting.
- Update Mobility Advisor's clinician records clearly documenting any changes to Facilities, Therapists, Physicians, Referrals, and communication preferences. *Example: If documentation should never be faxed to a specific clinician for any order, remove the fax number and enter the preferred contact method and detailed notes directly in the clinician's record.*

FS/RTS Reporting

- Select **Tools and Reports** in Mobility Advisor's "**Main Menu**"



- Select **Special Views** and then select **FS/RTS Report**



- Using the drop downs, there are four reports to be reviewed:
  - Not Submitted > 45 days from RTP (If the number of orders is low, drop down to >30)
    - Not Submitted > 30 days from RTP
  - Not Approved > 30 days from submission
  - Not Submitted > 30 days AND Not Approved > 30 days from submission

- Once the report is selected, it can be filtered by the specific ATP, Funding Specialist, and non-repairs.
  - Team members can then either select **GO** or click the **Excel checkmark** and **GO** to view in excel.
    - When selecting Excel, this downloads the orders to an excel file and we lose the functionality of being able to view orders live from a list. <u>Preferred to work from the MA list to access orders efficiently.</u>
    - When selecting **GO,** MA will display the work order list and you can click on the work order line to access the order for more information.
  - While the ultimate goal is that the displayed list of orders is very short, it is initially sorted from oldest to newest so review can be prioritized to fit within the time scheduled should there be an aged backlog to work through.