Mobility Advisor – Cancellation of Orders

This job aid is intended for National Seating and Mobility's employees to utilize when triaging if an order needs cancelled and the proper steps to take to cancel an order.

Prior to cancellation we must exhaust all efforts to advance the client's order forward. Attempts must include phone calls to client and should include phone call to all clinicians in scenarios in which documentation cannot be secured. In scenarios in which an order is being cancelled that is not per the client's request or passing, a pre-cancel contact letter must be sent. ATP/RTS must be notified 5 business days in advance of possible cancellations.

Below are the most common scenarios in which an order may require cancellation and the process to take during each scenario. It is critical anytime an order is cancelled to clearly document the information within Mobility Advisor notes and to select the most appropriate reason for the cancellation.

Common Cancellation Scenarios

1. **The client has requested cancellation or has passed away.** In this scenario, proceed immediately to cancellation with an informational notification to the ATP/RTS and any critical clinicians and/or referral sources.

2. **The client's order cannot proceed until we have updated insurance information, physician information, a completed physician/clinician visit and/or until the client discharges, etc.** In this scenario, if the order is in a holding pattern for more than 10 business days post client contact awaiting an update without a confirmed resolution or timeframe, inform the client NSM cannot proceed until the situation changes and their order will be cancelled at this time. They may restart the process at any time once required steps are taken to process their order. Proceed to cancellation with informational notification to the ATP/RTS and any critical clinicians and/or referral sources. If there has been no response from client, Client Contact Best Practices should also be followed throughout this process.
   a. If client requires re-evaluation by ATP and/or Therapist, using the **Request Help** feature on the Main Page of the order, request to remove **Evaluation, CB Complete, and RTP** dates to return the order to the proper evaluation scheduling work queue after notification to ATP, client, and therapist.
   b. At this step, advise branch leaders (e.g. ATP/Branch Manager) and any critical clinicians and/or referral sources by email and/or call that the order may be cancelled in 10 business days due to inability to proceed, clearly outlining the scenario and all previous actions taken.

3. **The client has a copayment or other amount due and is unresponsive.** See Client Contact Best Practices below.

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Client Contact Best Practices

1. When there is an inability to proceed forward in processing a client's order and critical information or payment is needed from a client, attempt to contact client once every 5 business days. During this process, attempt all contact methods including calling all numbers on file and leaving a message expressing urgency and that it is critical to contact NSM to proceed.

2. At the time of the second unsuccessful attempt, escalate to the ATP to advise that we are unable to reach the client, verifying we have all the correct contact information, and partner on next steps for the third and final attempt.
   a. If the responsible ATP is unresponsive, escalate to Branch Leadership (up to and including DVP/RAD as necessary) on next steps for the third attempt. If no response for an alternate solution is received within 5 business days from date of request, proceed with the final attempt and steps below.

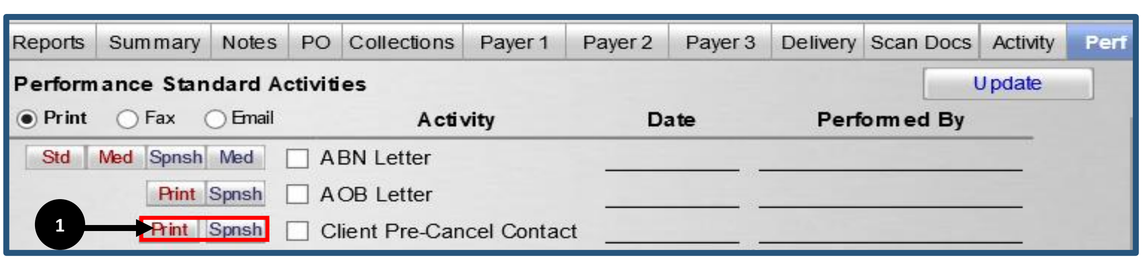
3. After the third contact attempt with no response, follow the below instructions to send a **Client Pre-Cancel Contact Letter**.

Sending a Client Pre-Cancel Contact Letter and Cancelling an Order

The **Client Pre-Cancel Contact Letter** must be sent when we are considering cancelling a work order. Additionally, maintaining and documenting client contact attempts is a customer service priority. Anytime client contact is attempted, it must be well documented within Mobility Advisor.

What is a Client Pre-Cancel Contact Letter: A printable template for the purpose of alerting a client that NSM has been unable to reach them, and we are unable to procced.

1. Click **Print** to print the **Client Pre-Cancel Contact Letter** in English or click **Spnsh** to print the Client Pre-Cancel Contact Letter in Spanish.
   a. The **Client Pre-Cancel Contact Letter** should always be printed on branch specific NSM letterhead and mailed in matching NSM envelopes. Use the "Look Up" tool in the Patient Information section to ensure we are using the correct address.



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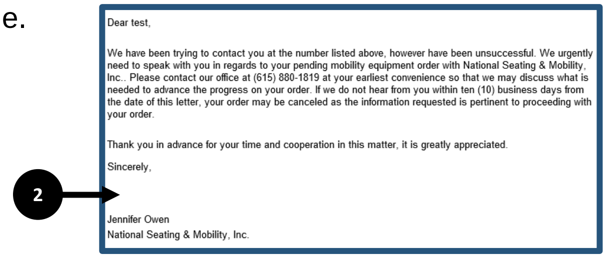
2. In ink or with an electronic signature **sign the letter** between the letter closing (Sincerely) and the printed employee name.



Dear test,

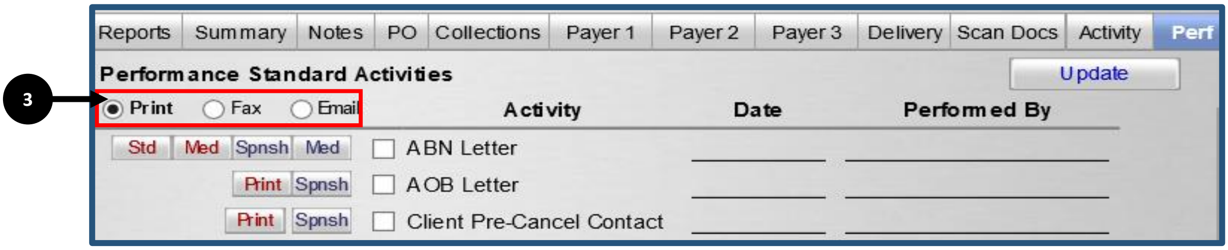
We have been trying to contact you at the number listed above, however have been unsuccessful. We urgently need to speak with you in regards to your pending mobility equipment order with National Seating & Mobility, Inc.. Please contact our office at (615) 880-1819 at your earliest convenience so that we may discuss what is needed to advance the progress on your order. If we do not hear from you within ten (10) business days from the date of this letter, your order may be canceled as the information requested is pertinent to proceeding with your order.

Thank you in advance for your time and cooperation in this matter, it is greatly appreciated.

Sincerely,

Jennifer Owen
National Seating & Mobility, Inc.

3. Using the **PERF** tab, **Print and mail, Fax,** or **Email** the **Client Pre-Cancel Contact Letter** based on the client's contact preference.



4. At this step, advise branch leaders (e.g. ATP/Branch Mgr.) and any critical clinicians and/or referral sources by email or call that the order may be cancelled in 10 business days due to inability to reach the client, clearly outlining the scenario in which we could not proceed, and all previous actions taken.

5. If there has been no response from the client within **10** business days of mailed **Client Pre-Cancel Contact Letter** <u>take the following action to cancel the order:</u>

Cancelling an Order

1. Call the client at all numbers on file, leaving a message at each advising that the order is being cancelled. *Skip this step if order cancellation is per client request or client has passed away.*

2. Review order for any deposits or payments made. If any payments were made, review AR balance for any other outstanding balances and request cash reapplication or initiate a refund to the client as applicable.

3. **Cancel work order** ensuring to select the most appropriate cancellation reason.
   a. If equipment has been ordered, ensure the **return process** is followed during cancellation. In the case of returns, ensure **order type** is immediately updated to **Return** and the appropriate line items in detail show **Return** as the auth status.
   b. Using the **Request Help** feature on the Main Page of the order, request to remove **Evaluation, CB Complete, and RTP dates** to return the order to the proper branch work queue to finalize the physical processing of the return and inventory management.

Note: There may be specific payer and/or facility requirements to cancel orders that require additional steps, which may supersede this process (e.g. Kaiser).

NATIONAL SEATING & MOBILITY