Policy F-700 Funding Attempt Escalation Policy

Introduction

National Seating & Mobility must obtain all the necessary documentation required by a payer in order to get funding approval. Our funding team is required to make high quality attempts to collect documentation on every order. When there are difficulties obtaining these documents, we must escalate the request to the next appropriate person while keeping our clients involved and updated. This policy outlines the escalation process that our funding team must follow.

First Request - Faxing or Emailing

1. Determine if a call needs to be made to the recipient prior to faxing or emailing to ensure we have the correct information. If recipient is a new contact for NSM, a call should be made.
    a. Identify yourself; calling on behalf of our client & their need for equipment while creating a sense of urgency.
    b. Request a commitment to action or an expected timeframe for return.
    c. Close the call by thanking them for their assistance and follow up to ensure fax was sent successfully.
2. Document order by updating the task in the Funding Portal with the action items and detailed notes.
3. Determine if follow up date needs to be manually set prior to the default date based on the ability to collect document quickly.

Second Request - Speak to the Office and/or Nurse

1. Speak with the person who assists with the faxes or emails; indicate you are following up on the initial request.
    a. Identify yourself; calling on behalf of our client & their need for equipment while creating a sense of urgency.
    b. Verify that the office has or has not received our initial request.
    c. Remind them that the documents requested are time sensitive.
    d. Request a commitment to action or an expected timeframe for return.
    e. Close the call by thanking them for their assistance and set a date for follow up.
2. Contact the client via phone or email to update them on the status of their order being careful not to fracture our relationship with the clinicians.
3. Document the order by updating the task in the Funding Portal with the action items and detailed notes.
4. Determine if follow up date needs to be manually set prior to the default date based on the ability to collect document quickly. Set a follow up date within the next 2 days if you were not able to speak to a live person in step 1 above.

Third Request - Action needed

1. Speak with the office to follow up on the status of the request and verify there are no obstacles to completing document such as the client being seen, a clinician out on leave, etc. Re-verify fax number and request a date to commit to return the document that allows us to update the client on progress.
   a. Remind them that the documents requested are time sensitive.
   b. Request a commitment to action or an expected timeframe for return.
   c. Close the call by thanking them for their assistance and set a date for follow up.
2. Contact the client via phone or email to update them on the status of their order being careful not to fracture our relationship with the clinicians.
3. Get people involved. Ensure to communicate to the client again and notify the ATP/RTS via phone or email as to details of what has transpired and what documentation is outstanding. If the branch has Key Account Manager (KAM) assigned for support, seek their involvement.
4. Discuss & identify alternate solutions to procuring the document. (Stopping by the office, scheduling appointment, etc.)
5. Document the order by updating the task in the Funding Portal with the action items and detailed notes. Include the discussion with the client, the ATP/RTS and the clinician.
6. Determine if follow up date needs to be manually set prior to the default date based on the urgency to collect the document. Set a follow up date within the next 2 days if you were not able to speak to a live person in step 1 above.

Fourth Request - Escalate

1. Speak with the office to follow up expressing urgency.
   a. Remind them that the documents requested are time sensitive.
   b. Request a commitment to action or an expected timeframe for return.
   c. Close the call by thanking them for their assistance and set a date for follow up.
2. Contact the client via phone or email to update them on the status of their order being careful not to fracture our relationship with the clinicians.
3. Get people involved. Ensure to communicate to the client again and notify the ATP/RTS via phone or email as to details of what has transpired and what documentation is outstanding. If the branch has Key Account Manager (KAM) assigned for support, seek their involvement.
4. Discuss & identify alternate solutions to procuring the document. (Stopping by the office, scheduling appointment, etc.)
5. Document the order by updating the task in the Funding Portal with the action items and detailed notes. Include the discussion with the client, the ATP/RTS and the clinician.
6. Set a follow up date within the next 2 days if you were not able to speak to a live person in step 1 above.
7. Notify RAD if there is no response from internal team members.

All additional requests - Escalate New Action needed

1. At this point in the process, multiple unsuccessful attempts have been made and we should continue to call the clinician, ATP and client following all the steps outlined above. If the branch has Key Account Manager (KAM) assigned for support, seek their involvement.
2. It is important to also keep people involved and to brainstorm alternate actions and solutions that can help our clients receive their much-needed equipment.
   3. Notify RAD if there is no response from internal team members and reach out to your AFD/M or Supervisor if you need assistance.