Client Contact – Complex Power Chair Pre-PPQA

This job aid is intended for National Seating and Mobility's employees to utilize during the PPQA Process. This outlines the use of Ushur and new requirements of client contact to validate three key questions before we can proceed with purchasing high-risk equipment.

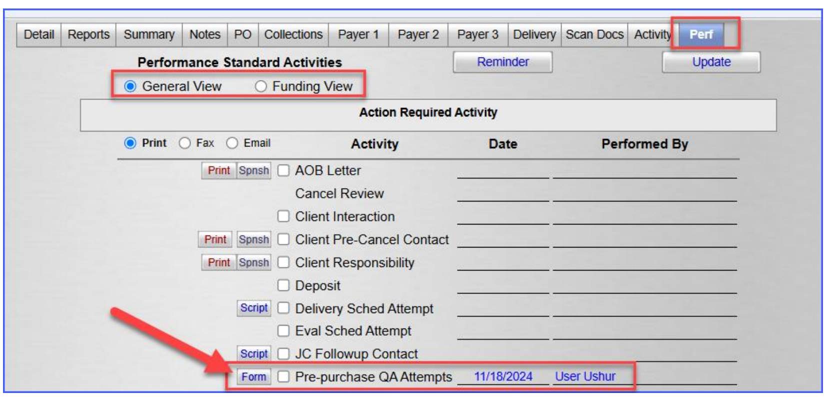
Scope: <u>**Required**</u> for ALL Complex Power Chairs; including Kaiser. Excludes Work Comp.
Available for Manual Chairs, Custom Seating, and Scooter Order Types; including Kaiser.

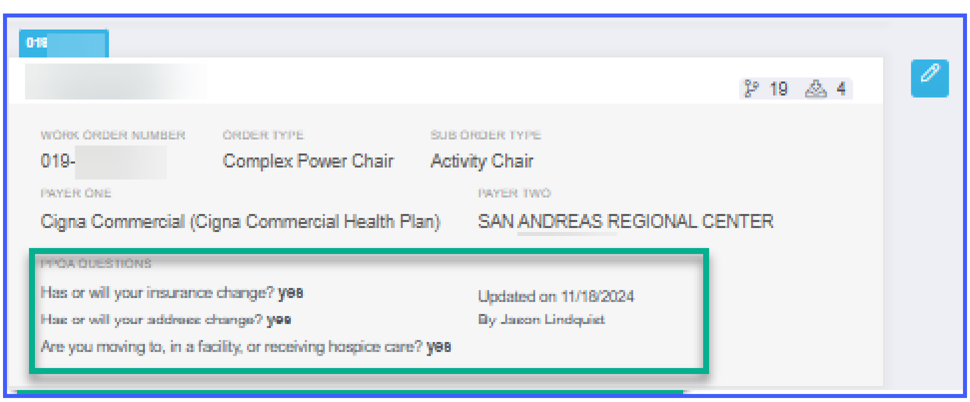
Goals: Implement a consistent client contact process using a texting tool (Ushur) and phone calls to ensure client information is correct prior to ordering this equipment to reduce unused inventory.

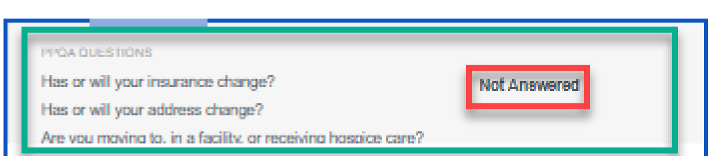
Below are the steps required for client contact prior to completing Pre-Purchase Quality Assurance (PPQA). For a list of all steps required at the time of PPQA, see the updated **PPQA Steps** document. Ushur will use the Primary and/or Mobile Phone information found in client demographics to contact the client via text message. Ushur currently only sends messages in English.

Client Contact and Pre-PPQA Question Completion prior to PPQA

1. Once the order is in the **PPQA** work queue, review the contact card or Mobility Advisor's **Perf** tab under PPQA **Form** to determine if the required Pre-PPQA questions have been answered via Ushur.







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If Ushur has captured the client's response

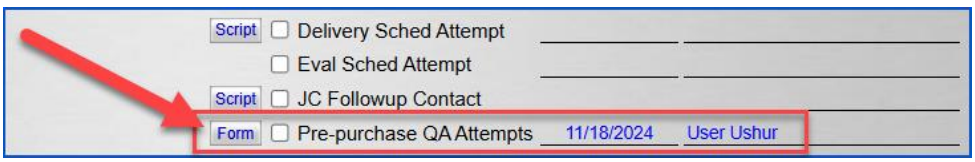
Note: Responses secured by Ushur will appear in the work order on the following day.

1. **If the responses are returned without changes (responses = No)**, call the client to confirm and collect any client responsibility due. Complete all remaining required steps of PPQA.

2. **If the responses are returned with changes (responses = yes),** contact client to secure necessary information, update information in the work order as needed, and triage the order to confirm ability to proceed.
   a) If changes do not impact funding and we are able to proceed, contact client to confirm and collect any client responsibility due. Complete all remaining required steps of PPQA accordingly.
   b) If changes impact funding and we cannot proceed, update the order to the correct stage and inform, client, RTS, and clinicians of change in status.

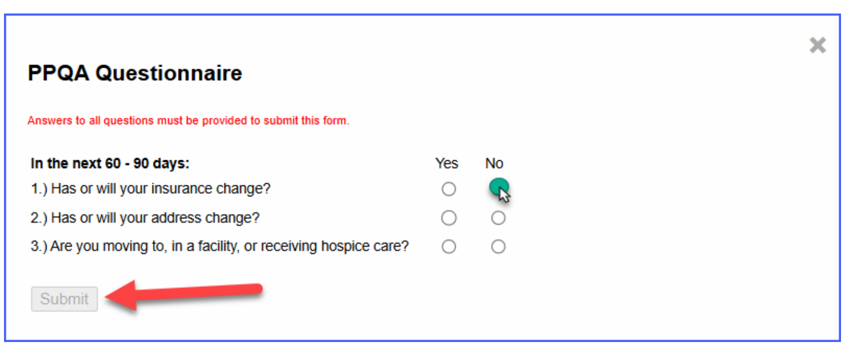
If Ushur has <u>not</u> captured the client's response

1. Contact client to discuss and collect amount due and notify equipment is ready to be purchased from the manufacturer after confirming three key questions as outlined below.
   a) Navigate to the **Perf tab** and the PPQA **Form** to complete the **Pre-PPQA Questionnaire** ensuring no changes within the next 90 days that may impact funding:



   - Confirm insurance listed in the order has not or will not change prior to delivery.
   - Confirm client's address shown in the order has not or will not change prior to delivery.
   - Confirm client is not currently in or moving to a facility or receiving hospice care that would impact funding prior to delivery and that the Place of Residence (POR) in delivery tab is still valid.

   b) Document the responses in the PPQA Questionnaire and note any pertinent details, updating the order accordingly. **Note: Anyone (Funding, CSS, RTS, Tech, etc.) can complete this step with the client.**



   - If the changes do not impact funding and we are able to proceed, also confirm and collect any client responsibility due. Complete all remaining required steps of PPQA accordingly.

   a) If changes impact funding and we cannot proceed, update the order to the correct stage and inform, client, RTS and clinicians of change in status.

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No Client Response

1. Attempts to contact the client to confirm required information should be made consecutively for 3 days by the Funding Specialist.
2. Follow the **Funding Attempt Escalation Policy** and the **Mobility Advisor Cancellation of Order Process**, exhausting all methods of contact to reach client. Ensure we are informing all clinicians involved to assist in reaching the client.
3. Equipment is **not** eligible for a credit exception and cannot be purchased if we have not been able to contact client to confirm Pre-PPQA Questions.

Common Scenarios

1. What happens if the client calls in and shares something has changed?
   a) Complete the Pre-PPQA questions and secure as much information about the changes as possible. Document the responses in Mobility Advisor and make detailed notes. The Funding Specialist will verify the new information and confirm ability to proceed. If we cannot proceed, the order will be updated and the client and ATP/RTS will be notified.

2. What if the client indicates they are temporarily in a facility/hospital?
   a) Confirm coverage with the payer and confirm discharge date. If the payer does not cover the equipment while in facility, inform client equipment will not be purchased until the client has been discharged and is home. Continue to follow up with client directly. Funding Specialist to add a S Document requirement to confirm discharge date and perform follow up.

3. What happens if the client responds they will be enrolling in Hospice care?
   a) Confirm coverage with the payer, hospice enrollment date, and diagnosis if needed for payer requirements. If the payer does not cover the equipment while in hospice, identify if client equipment can be purchased, received, delivered in time prior to admittance or if the client has alternate funding.

4. What if the client indicates they are moving out of state?
   a) Confirm new address and if insurance is changing, particularly Medicaid. Notify ATP/RTS and identify if current branch location can proceed with delivery, if the order needs transferred, or if we can follow our drop-ship process.

5. What happens if the client cannot be located and is unresponsive?
   a) If after 3 consecutive attempts, following NSM's Escalation Policy, when the client cannot be located and is unresponsive, the order will not proceed to purchase and will be cancelled.