Ushur & Client Contact Pre-Purchase Pilot

Client Information Verification prior to purchase for New Equipment Orders

Updated 5/9/2025

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Opportunity & Solution

Business Opportunity:

NSM has an inconsistent process of verifying key client information directly with the client prior to purchasing equipment that leads to cancellations and unused inventory.

Proposed Solution:

Implement a consistent client contact process using a texting tool (Ushur) and phone calls (Funding) to ensure client information is correct prior to ordering equipment.

What’s Next?

- **What:** Updating the Pre-Purchase Quality Assurance (PPQA) process to include required client contact and verification of three questions prior to completion of PPQA and purchasing of high-risk equipment.

- **How:** Funding Specialists will contact clients with the support of Ushur.

- **Tools:** Ushur is a customer experience automation company that uses artificial intelligence (AI) to improve customer serve. Ushur will proactively text our clients in the process to secure information prior to purchase.

- **Scope:** <u>REQUIRED</u> for all Complex Power Chairs

  Available for all Power Chairs, Manual Chairs, Aids to Daily Living, Custom Seating, and Scooter Order Types; including Kaiser. Excludes Work Comp.

- **Important Dates:**
  - **May 5th, 2025:** Client contact to confirm these key questions is required **prior to purchase and PPQA** completion for all Complex Power Wheelchairs
  - May 2025 – Launch Ushur and Pre-Purchase PPQA form to capture responses in all New Equipment Order Types. DATE TBD – *estimated completion week of May 5th*
  - Future State: Hard stop in system will be implemented in which PPQA will not be available for these order types until the form questions have been answered. Current pilot has been in place since 2/15/2025.

Pre-Purchase Quality Assurance Process

1. Re-verify eligibility & benefits for all payers.
2. Validate scanned documents and confirm they have not expired.
3. Validate Authorization/Denial was entered correctly.
4. Review Summary Tab to confirm if client has an out-of-pocket expense due. Contact client and collect payments due and/or confirm ability to pay at delivery per payer requirements.
5. Contact client to notify equipment is ready to be purchased from the manufacturer.
    1. Confirm and collect responsibility due in accordance with NSM's Credit Policy.
    2. Complete **Pre-PPQA Questions** in Mobility Advisor ensuring no impactful changes in the next 90 days:

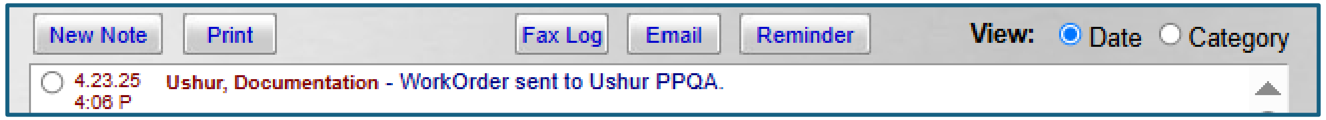
a) Confirm insurance has not and will not change prior to delivery.
b) Confirm client's address has not or will not change prior to delivery.
c) Confirm client is not currently in or moving to a facility or receiving hospice care that would impact funding prior to delivery and that the Place of Residence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

These questions can be confirmed with the use of Ushur!

- If anything has changed, update information in Mobility Advisor and validate that we are able to proceed with item(s) and payer(s) selected without further action.
- If we are not able to proceed, in addition to discussing with client, also notify ATP/RTS for further communication with client/clinician as needed.

6. Complete PPQA activity in the Perf Tab.

Ushur Support



TEXT to client

Uses Primary and/or Mobile Phone listed in demographics

Sent at time all funding has been submitted (Funding Pkg Submitted Date)

(Q1) Has or will your insurance change prior to delivery?

(Q2) Has your address changed or are you planning to move?

(Q3) Are you currently in a hospital, rehab facility, nursing facility and/or receiving hospice care?

Communication Process Flow

1st Text Attempt - No Response

- 2nd text is sent 24 hours later
- Still No Response – Funding Calls Client

When Responses are Returned without Changes (Responses = NO)

- Order will proceed through PPQA Process

When Responses are Returned with Changes (Responses = YES)

- Funding Specialist contacts client to secure necessary information, confirms ability to proceed, and/or updates order to the correct stage.

No Response After 3 Consecutive Attempts

- Attempts to contact the client to confirm required information should be made consecutively for 3 days by the Funding Specialist.
- Follow the **Funding Attempt Escalation Policy** and the **Mobility Advisor Cancellation of Order Process.**
- Equipment is not eligible for a credit exception if we have not been able to contact client to confirm Pre-PPQA Questions.

Response Timeframe Requirements

- Pre-PPQA questions must be answered within 14 days of PPQA completion. The requirement will reset if the order has not been PPQA'd within 14 days.

Communication Process Timeline

Stage PPQA was previously completed; now PPQA is not completed until client is contacted

Example Dates:

5/1 – Funding Pkg Submit Date Completed
- **1st Automated Text**

5/2 – Next Day
- **2nd Automated Text**

5/9 – Funding Approval Completed (7 Day avg)
- **Call to Client**

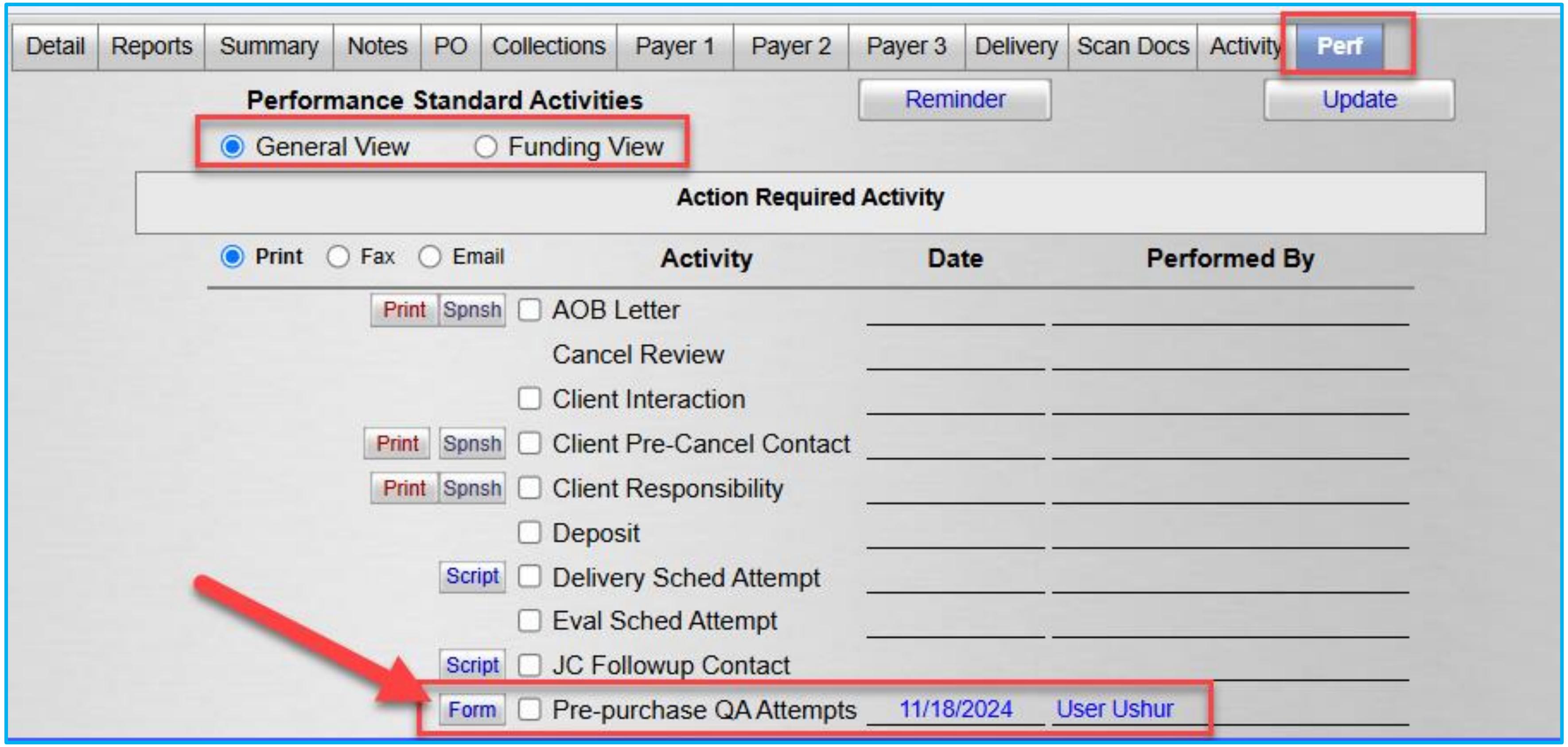
5/10 – Next Day
- **Call to Client** and alternate contacts

5/11 – Next Day
- **Call to Client**, Clinicians, ATP to escalate. Send client pre-cancel contact letter.

5/12 – Next Day
- **Final Call to Client** & move to cancellation if no response

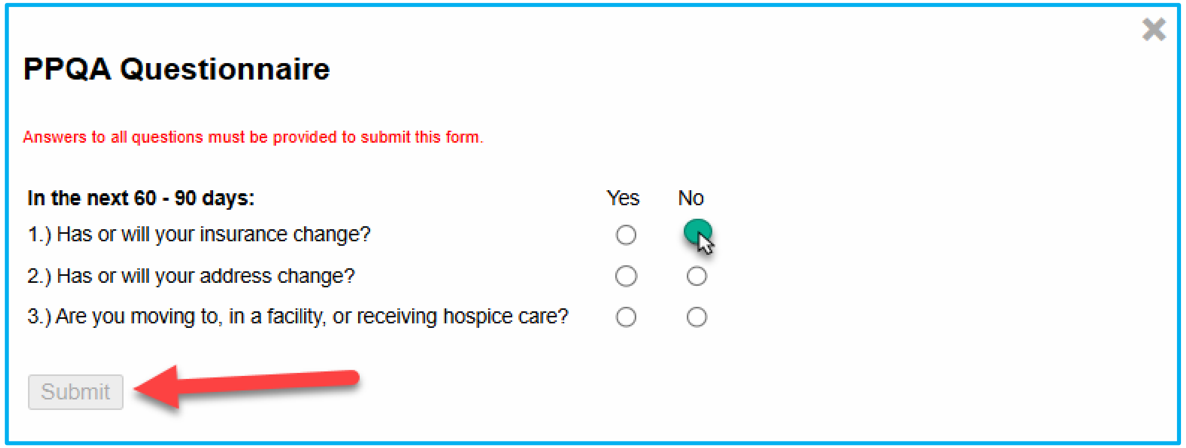
Mobility Advisor & Funding Portal Updates

- If the client returns our call, anyone answering the call may ask and answer these questions in Mobility Advisor. From can be found in the **Perf** tab, under **FORM** of the **Pre-purchase QA Attempts** activity.



Mobility Advisor & Funding Portal Updates

- Once in the form, answer the questions and select **Submit** to save changes



PPQA Questionnaire

Answers to all questions must be provided to submit this form.

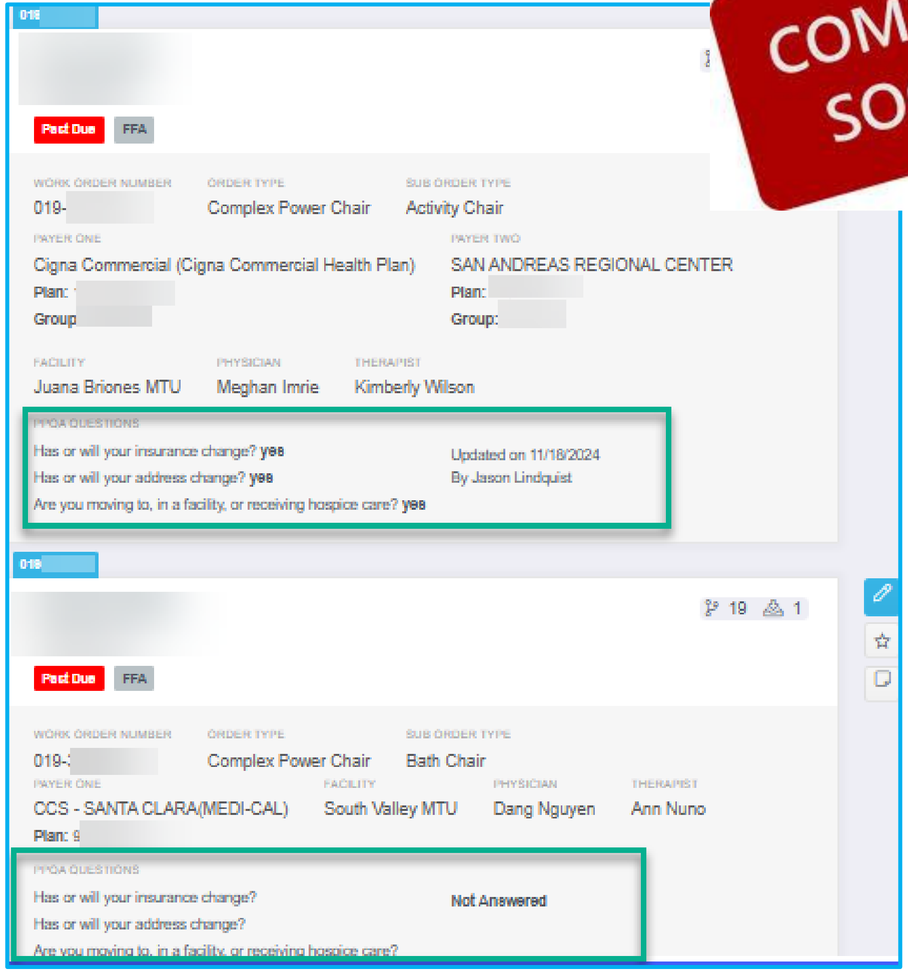
In the next 60 - 90 days:	Yes	No
1.) Has or will your insurance change?		
2.) Has or will your address change?		
3.) Are you moving to, in a facility, or receiving hospice care?		

Submit

The questions and answers are visible in the Funding Portal's PPQA Work Queue, directly on the client contact card.

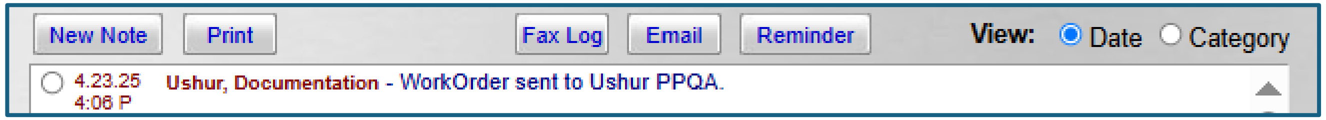
Responses secured by Ushur will appear in the order the following day.

Orders will return to queue 24 hours after a PPQA attempt.

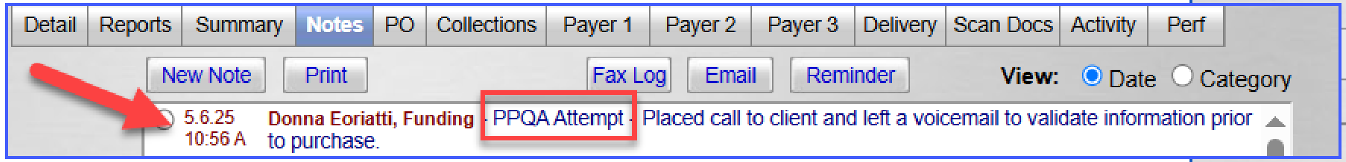


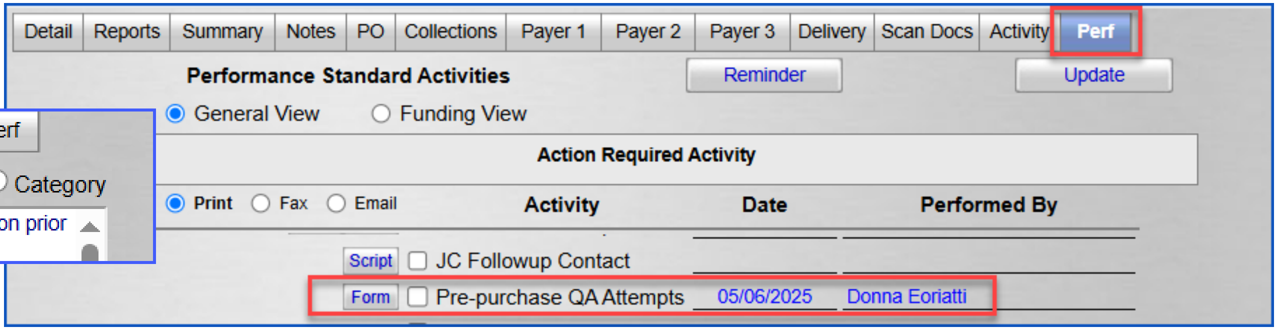
Mobility Advisor & Funding Portal Updates

- When Ushur sends the request to the client to complete the Pre-PPQA Questionnaire, the following note will be visible in the work order. (Sent at time of completion of **Funding Pkg Submitted** Date).

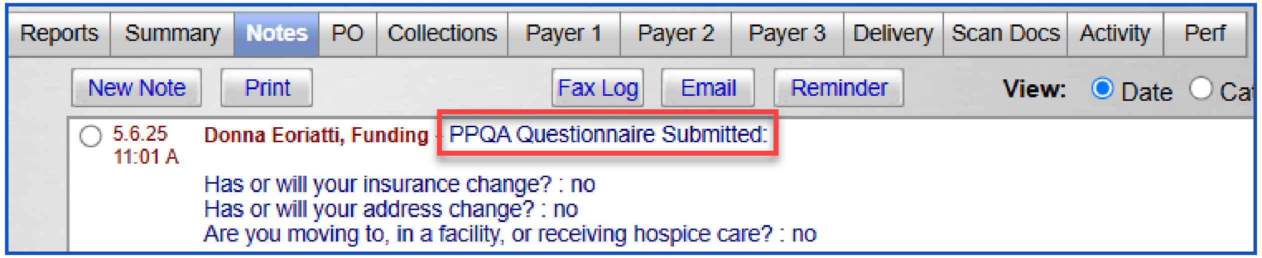


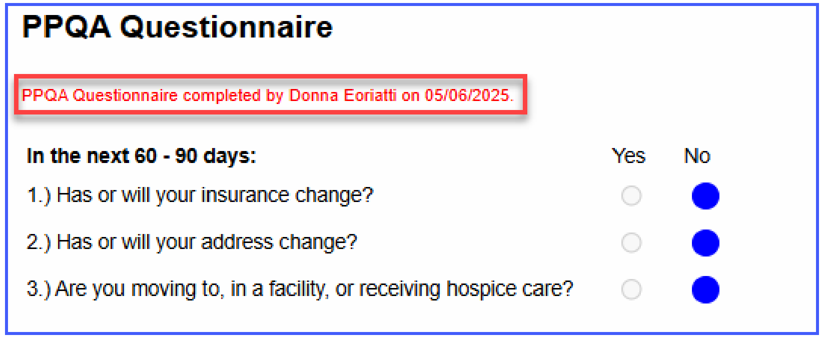
- When Funding Specialists attempt to contact the client, the attempt will show in **Notes** and **Perf** tab.





- Once the answers have been documented in the order, the information will be saved to work order **Notes** and to the **PPQA Form** on the **Perf** tab.





Frequently Asked Questions & Answers

- What happens if the client calls in and shares something has changed?
  - 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.

- What if the client indicates they are temporarily in a facility/hospital?
  - 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.

- What happens if the client responds they will be enrolling in Hospice care?
  - 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.

Frequently Asked Questions & Answers

- What if the client indicates they are moving out of state?
  - 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.

- What happens if the client cannot be located and is unresponsive?
  - 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.

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Questions