



## Policy F-600 Work Order/Delivery Transfer

### Introduction

As National Seating and Mobility continues to expand, we are able to cover more markets every year. With our growth comes opportunity for clients that may move or seek care in “Destination Rehab Centers” (in or outpatient centers that clients travel great distances to receive rehab care). When clients cross branch service boundaries, relocate in the process of getting equipment, or temporarily live in different locations in a year, this presents challenges to facilitate moving a client’s order to the appropriate branch that will be servicing the client. Furthermore, shared order credit can be established within a branch for non-ATP certified RTS’s working with payers that require an ATP present in the equipment selection process.

The goal of the work order transfer is to:

- 1) Associate correct NPI numbers between payer and NSM branch that is completing the work in the physical area to where the client will reside.
- 2) Efficiently move a work order without redundant data entry.
- 3) Appropriately apply commission and sales revenue to where a referring RTS is coordinating delivery with a designated RTS in another branch. Credit will be determined based on two types of work order transfers:
  - a. **Equipment Dropship** – An Equipment Dropship is classified as the branch that obtained the order (Branch A) completes client evaluation, procures funding, orders equipment and drop ships to a branch outside of their service area (Branch B) while both branches are credentialed with the client’s insurance. **50% of commission is split between RTS’s associated on the order.**
  - b. **Work Order Transfer** - A work order transfer is required when Branch A receives an order that a client lives in a geographical area that they are not credentialed with the client’s insurance. Branch A can complete CB and RTP and then transfer the work order to Branch B prior after FPNA. Branch A Funding Specialist will assist to collect documentation for Branch B to submit to the payer. Once documentation has been obtained, the work order will be transferred to Branch B. **50% of commission, COG’s, and revenue is split between both branches and RTS’s associated with the order.**
- 4) Compliantly ensure ATP involvement is appropriately captured where payers require ATP involvement for client evaluation.



## Procedure for Equipment Dropship

1. The branch in which the order originated (Branch A) will need to indicate who will be doing the delivery to where the equipment is being drop-shipped to by selecting the RTS under “Ref/Del RTS”:

Work Order ID	002-1661271	Date	11/15/2017	<input type="checkbox"/>	<b>ACTIVITY DATES</b>	<b>PURCHASE ORDER</b>
RTS Name	Jason Lindquist	Referral			Generated	Generated
Technician		Initial Contact			Issued	Issued
Fndng Specialist		Evaluation	11/14/2017		Cancelled	Cancelled
Revenue Type	FFS	Detail Update	12/07/2017		Received	Received
Customer Tracking	Regular	Mold Schedule			0	0
Order Type	Complex Power Chair	Payer 1:	Cgs Jurisdiction B Dme Mac		0	0
Suborder Type	Power Chair	Payer 2:	Wellcare Of Kentucky		0	0
Patient	Allen, Rella	Payer 3:			First Issue Date	
Physician	Christopher Cooper	Documents	Submission	Delivery	All PO Rcv'd Date	
Therapist	Kristin Little	Completed		03/28/2019	Delivery Verified By	
					Delivery Person	
					Delivered Date	
					Divry Requirements	
					Ref/Del RTS	Hardey, Jason

2. Branch A will forward the delivery paperwork and face sheet to the RTS in Branch B to complete delivery.
3. Branch B will create a new WO for the client and select No Payer as the Payer, and note the order as a delivery only.
4. Branch B will then complete delivery, scan the delivery paperwork, and post the order.
5. Branch B will send completed delivery paperwork to Branch A to post and confirm the original order.

## Procedure for Work Order Transfer

1. The RTS from the originating branch needs to coordinate a client’s move to the new branch with the new RTS that will be handling the order and delivery.
2. All documents required for submission should be collected by the Funding Specialist that supports the originating branch. This practice allows the ATP, therapist, and associated physicians to maintain consistency in their process and relationship with their local support. Once submission documentation is obtained, the order should be transferred to the contracted delivering branch.
3. The appropriate Funding Specialist / RTS would e-mail their Area Funding Director (AFD) to request a Work Order Transfer at the time the order is ready for submission to the payer after receiving completed documentation. ***If a work order transfer is requested after Approval and/or PO’s have already been issued, a manual order transfer will need to be completed\*.***



- The AFD will review the order based on payer requirements to understand where the delivery can/must take place. If the order is able to be transferred, then the AFD will initiate the transfer on the Main Page of the work order by selecting:

A screenshot of a web application interface for work orders. It includes fields for 'Credit Ex. Purchase', 'Credit Ex. Delivery', 'Notes', and 'Patient DOB: 03/26/2002'. On the right, there are checkboxes for 'Client Rights & Resp', 'Parts Only Order', and 'LMN iPad'. A red arrow points to the 'Move WO' button at the bottom right.

- After the request is initiated the AFD will choose the appropriate Branch that will be obtaining funding approval and completing the delivery:

A dialog box titled 'Move Work Order to Another Branch'. It shows 'Workorder: 002-1604623' and 'Move to Branch: Choose new branch...' with a dropdown arrow. There is an 'RTS:' label and a 'Move WO' button.

- The AFD will also select the appropriate RTS in the NEW branch as directed by the Funding Specialist/RTS:

A dialog box titled 'Move Work Order to Another Branch' showing the next step. 'Workorder: 002-1604623' is displayed. 'Move to Branch:' is now '3 - Miami' and 'RTS:' is 'RTS Branch', both with dropdown arrows. The 'Move WO' button is still present.



- The AFD will then select "Move WO" to complete the transfer

**Move Work Order to Another Branch**

Workorder: 002-1604623

Move to Branch:

RTS:

- Once the work order transfer is complete, the new work order ID created will populate and display for reference:

**Move Work Order to Another Branch**

Workorder: 002-1373665

Move to Branch:

RTS:

Created new workorder **003-1661161**

- Once the work order has been transferred all Scan Doc's, Client Demographics, and Detail will be moved to the new order systematically.
- In the originating branch where the order started a note will automatically populate into the Notes field:

**5.13.19 Derek Miller, Documentation - This workorder moved to**  
**12:42 P 003-1661160, RTS: RTS Branch**

- The Delivered Date in the transferred work order will automatically populate to remove the work order in the originating branch as an active order:

**PURCHASE ORDER**

Generated	Issued	Cancelled	Received
0	0	0	0

First Issue Date

All PO Rcv'd Date

Delivery Verified By

Delivery Person

Delivered Date



12. In the Work Order Search field, the transferred order will appear as Delivered:

Work Order	Last	First	WO Date	Amount	RTS	Order Type	Sub Type	Delivered
002-1604623			03-05-18	\$0.00	Bodiford	Eval	Manual Chair	05-13-19
002-1485563			09-11-17	\$2,173.60	Bodiford	Aids to Daily Living	Toilet Seat	10-20-17
002-1485620			09-11-17	\$2,096.32	Bodiford	Modification	Manual Chair	11-09-17

13. In the transferred to branch the RTS Name and Referring RTS will be displayed as highlighted below:

Work Order ID	002-1661271	Date	11/15/2017	<input type="checkbox"/> P	ACTIVITY DATES	PURCHASE ORDER			
RTS Name	Jason Lindquist	Referral			Generated	Issued	Cancelled	Received	
Technician		Initial Contact			0	0	0	0	
Fndng Specialist		Evaluation	11/14/2017		First Issue Date				
Revenue Type	FFS	Detail Update	12/07/2017		All PO Rcv'd Date				
Customer Tracking	Regular	Mold Schedule			Delivery Verified By				
Order Type	Complex Power Chair	Payer 1:	Cgs Jurisdiction B Dme Mac		Delivery Person				
Suborder Type	Power Chair	Payer 2:	Wellcare Of Kentucky		Delivered Date				
Patient	Allen, Rella	Payer 3:			Delivery Requirements				
Physician	Christopher Cooper	Documents	Submission	Delivery	Ref/Del RTS	Hardey, Jason			
Therapist	Kristin Little	Completed		03/28/2019					

15. A note will auto populate as to who initiated the work order transfer in the new branch:

5.13.19 **Derek Miller, Documentation** - This workorder moved from 002-1604623  
1:42 P



### Internal Branch Transfers / RTS Split

There are various circumstances where RTS's may need to split commission with a fellow RTS in their own branch. Whether the RTS may not be an ATP when a Medicare requirement may need to be met or RTS needs to take a leave of absence and have another RTS complete the delivery you can share credit of the order as shown below:

Work Order ID	002-1661271	Date	11/15/2017	<input type="checkbox"/> P	<b>ACTIVITY DATES</b>	<b>PURCHASE ORDER</b>		
RTS Name	Jason Lindquist	Referral			Generated	Issued	Cancelled	Received
Technician		Initial Contact			0	0	0	0
Fndng Specialist		Evaluation	11/14/2017		First Issue Date			
Revenue Type	FFS	Detail Update	12/07/2017		All PO Rcv'd Date			
Customer Tracking	Regular	Mold Schedule			Delivery Verified By			
Order Type	Complex Power Chair	Payer 1:	Cgs Jurisdiction B Dme Mac		Delivery Person			
Suborder Type	Power Chair	Payer 2:	Wellcare Of Kentucky		Delivered Date			
Patient	Allen, Rella	Payer 3:			Delivery Requirements			
Physician	Christopher Cooper	Documents Completed			Ref/Del RTS	Hardey, Jason		
Therapist	Kristin Little	Submission						
		Delivery	03/28/2019					

### Footnotes

- **Work Order Transfer after Approval or PO's issued\*\*** - There are multiple requirements to be completed after an approval is logged or PO's issued that cannot be automated in Rehab Advisor to initiate a work order transfer. If there is a situation that a client is moving to a geographical area that is not contracted or is not in their coverage area then the order will be need to be cancelled in the originating branch and manually re-started in the new branch.
- For clients tracking their order through mynsmorder.com, once an order has been successfully transferred the client will get a text with a NEW work order number that they will need to reference as they track their order to delivery.
- For work order splits within a branch there is no need for an RTS to notify a RAD or RVP to split order credit as it relates to commissions, since this tool eliminates the need for e-mail action.
- After an order is transferred Purchasing will redirect the shipment to the branch that will be completing the delivery.