

# 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.

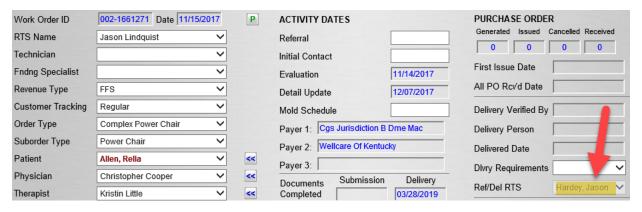
The goal of the work order transfer is to:

- 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":



- 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**

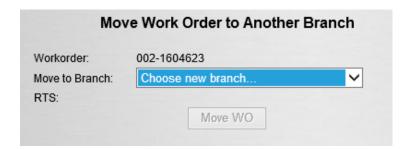
- 1. The RTS from the originating branch needs to coordinate a client's move to the new branch with the new RTS that will be handling the order and delivery.
- 2. All documents required for submission should be collected by the Funding Specialist that supports the originating branch. This practice allows 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\*.



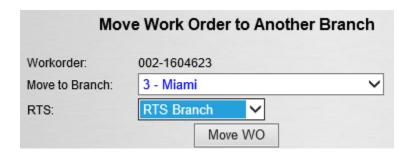
4. The AFD will review the order based on payer requirements to understand where the delivery can/must take place. If the order is able to be transferred, then the AFD will initiate the transfer on the Main Page of the work order by selecting:



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

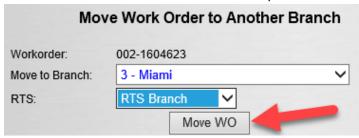


6. The AFD will also select the appropriate RTS in the NEW branch as directed by the Funding Specialist/RTS:

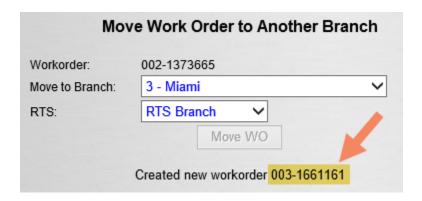




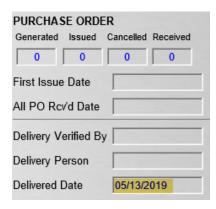
7. The AFD will then select "Move WO" to complete the transfer



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



- 9. Once the work order has been transferred all Scan Doc's, Client Demographics, and Detail will be moved to the new order systematically.
- 10. 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
- 11. The Delivered Date in the transferred work order will automatically populate to remove the work order in the originating branch as an active order:

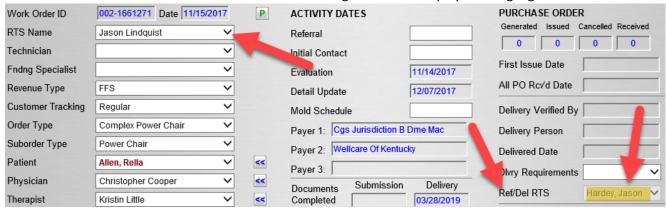




12. In the Work Order Search field, the transferred order will appear as Delivered:

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:



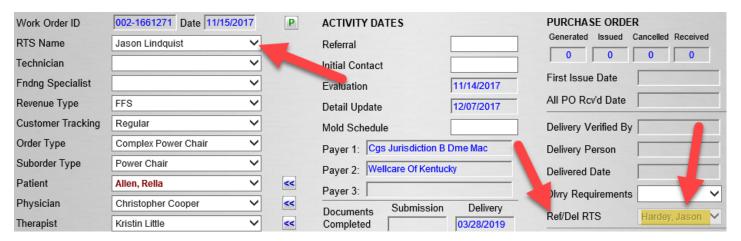
15. A note will auto populate as to who initiated the work order transfer in the new branch:

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:



### **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.