Standing Up a Groundbreaking Revenue Reconciliation Program During Epic Go-Live

bluetree
Background and Challenge

In October 2018, two of the nation’s largest health care systems faced a challenging task – implementing Epic while integrating two organizations.

In early 2018, our partner began a massive Epic revenue cycle implementation effort to bring their newly acquired sites onto their original instance of Epic. An initially rocky ambulatory revenue cycle roll-out brought increased pressure to successfully implement Epic’s inpatient revenue cycle applications, including Single Billing Office. Assuring success required mitigating risks and readying leaders for the new Epic paradigm.

Our partner’s five-wave roll-out meant preparing thousands of end-users and hundreds of leaders across the state for the first two hospitals (Wave 1). Wave 1 needed to prove a deployment model that could be used at all subsequent sites while maintaining performance on key metrics, including:

- Candidate for Billing AR Days
- Cumulative Posted Charges Percent of Baseline
- Claims Acceptance Rate

Solution

While their billing and revenue cycle leadership were focused on operationalizing the system for their first go-live, a team of five reconciliation experts sought to create and implement a comprehensive reconciliation program alongside a proven partner who could help mitigate risk, project manage the entire process, and assist in developing and conducting training.

Our partner already had buy-in on this approach from their Chief Financial Officer and revenue cycle and clinical leadership. Their legacy reconciliation process relied on reactive auditing procedures by comparing claims to clinical documentation well after the point of care through a third-party vendor. Moving to a daily review process, working with Epic native reporting tools, and collaborating across more than 120 cost centers would be a large, challenging logistical and cultural initiative.
Execution

Project Management

Bluetree provided needed bandwidth and direction to manage the revenue reconciliation project across clinician and revenue cycle leadership.

Bluetree’s revenue cycle reconciliation resources spent the first 1.5 months creating and executing a pre-live charge reconciliation activity tracker and project plan. Bluetree worked with our partner’s Regulatory Integrity Director to involve the right people, assign ownership, and map out timelines.

We also:

• Conducted weekly project management calls with regulatory integrity team members and revenue cycle leadership.

• Established connections with key stakeholders from training, HIT, and hospital operations to ensure accurate timelines and understanding of go-live milestone tasks.

• Developed a copy of the pre-live charge reconciliation activity tracker and project plan that their team could use as a repeatable, step-by-step guide for the next four go-lives.

Revenue Reconciliation Workshops

Once the scope of the reconciliation program was aligned with the go-live, our partner steered toward charging preparedness and tapped into Bluetree’s expertise rooted in training and Epic build.

Bluetree developed and delivered revenue reconciliation workshop presentations and trained more than 200 clinical end users, conducted login testing, and finalized charge preparedness training materials.

We also:

• Developed and delivered charging preparedness calls to lay foundation for workshops.

• Coordinated with HIT for pre-go-live security changes and access to Epic reports and activities.

• Tested logins and reporting tool access and resolved login issues during workshops.

• Conducted 14 login lab sessions for clinical charge champions.
Clinical Charging Owner Readiness

Before the new reconciliation program, our partner had trouble giving cost centers a sense of ownership over their departments and lacked methods for quickly identifying missing charges and patterns. They needed someone to reinforce charging owner readiness and key workflows, while standardizing the process for clinician input when late charges were entered for write-offs.

They worked with Bluetree to create and deploy Cost Center Stabilization and Charge Champion checklists to help users prepare in the two months before go-live. As go-live approached, they reinforced the daily charge reconciliation processes in Epic and evolved the cost center owner stabilization tasks accordingly.

We also:

• Showed cost center owners how to use revenue tracking and reconciliation tools to identify gaps in charging and incorrect charges.
• Achieved 90% checklist sign-off from cost center owners by week 7 after go-live.

Charging Hub Go-Live Support

Our partner needed to ensure there was adequate provider support at go-live for the first phase rollout. Bluetree created a go-live support guidebook for regulatory integrity team members, an organization wide support schedule, revenue reconciliation audit reports, and provided at-the-elbow Charging Hub support for nearly 140 people over 14 days.

We also:

• Reviewed revenue integrity missing/late charge trends and advised regulatory integrity on workflow and build fixes.
• Developed reports to identify incorrect or missing charges for:
  • Beds
  • Unposted OR logs
  • Radiology
  • Lab
  • Therapy orders
  • Outpatient
• Organized and implemented a reconciliation audit report and follow-up process.
• Coordinated on-site training logistics.
Outcomes Summary

In addition to arming revenue cycle and clinical leaders with repeatable project plans and training, they leveraged Bluetree’s Charging Hub Support for nearly 140 people over 14 days during go-live transitions.

This combination of project management, change management, and reconciliation training culminated in the following metrics:

<table>
<thead>
<tr>
<th>CUMULATIVE POSTED CHARGES</th>
<th>Goal</th>
<th>November 1, 2019</th>
</tr>
</thead>
<tbody>
<tr>
<td>101%</td>
<td>102%</td>
<td></td>
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</tbody>
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It also resulted in unparalleled confidence in the new build and workflows, with the metrics below showing end user readiness survey results 30 days prior to go-live:

- 94% of their billing office, coding, HIM, and leadership attested they believed they would have successful go-live.
- 92% of the same group attested to believing their staff would have a successful go-live.
- 92% of supervisors and managers reported that they have reviewed all Start, Stop, and Continue workflow change management documentation with their staff prior to go-live.

This program resulted in our partner exceeding revenue capture baselines within four weeks of go-live.

Summary

Our partner exceeded all expectations and ensured quick revenue stabilization and adequate provider support in a unique, fast-paced environment following a complex merger and revenue cycle go-live. By allocating appropriate resources across go-lives and their new revenue reconciliation processes, they are ensuring smooth rollouts and lower revenue leakage throughout the remainder of their five-part rollout to 11 hospitals across the region.

I wish I had known how impactful our role as Charge Reconciliation team members would be to the clinicians at go-live.

Bluetree provided expertise and innovative solutions in preparation for our Epic go-live. Our consultants were true partners in ensuring that processes were developed and communicated to stakeholders, and that our revenue cycle team was prepared for our go-live. We achieved most of our Epic-recommended go-live milestones on time, often with top quartile results, and Bluetree’s core success metrics (CFB, cumulative charge posting, and clean claim rate) were met well in advance of their contractually-obligated deadlines. Bluetree was instrumental in that success.

Billing Director & ARCR Program Director

82% of post-go-live revenue cycle, HIM, and access team respondents agree that Revenue Reconciliation workshops helped contribute to Wave 1 go-live success.

92% of revenue cycle, HIM, and access team respondents said Revenue Reconciliation workshops will help contribute to the success of the upcoming Wave 2 go-live.

This was the most helpful Epic class we’ve taken.

Clinician