

IS IT TIME FOR NEW TECHNOLOGY?

Leveraging the Data You Already Have to Determine if a Change is Worth it

January 18, 2023 | 1:00 pm – 2:00 pm ET



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OPEN MINDS

Meet Your Panelists

Christy Winter

Director of Product, Qualifacts

Christy serves as a Product Director at Qualifacts and is responsible for the clinical and reporting/analytics products. Additionally, she has 12+ years' experience in program evaluation, practice-based research, outcomes measurement, and quality improvement experience in the provider setting. Christy has a Bachelor's in Psychology and a Master's in Social Work.



Meet Your Panelists

Tammy Selleck

Senior Manager of Revenue Cycle of Management Services, Qualifacts

Leveraging her extensive background as a public accountant and controller for a community mental health center, during her time with Credible Tammy brought 78 agencies live including seven in new states and 22 with RCMS (outsourced billing). She was a leader in integrating Change Healthcare with Credible, streamlining many billing processes along the way. In addition, she redesigned the billing workflows to align with the platform's best practices, using that opportunity to create the "Credible Billing: Step By Step" documentation. Currently she oversees more than \$120 million in Qualifacts Revenue Cycle Management Services. Tammy has earned a BS in Business Accounting and an MBA, both from Indiana University.



Meet Your Panelists

Suzanne Malmkar

Director of Product Management of Partnerships, Qualifacts

Suzanne plays a key role in the strategic direction of partnerships to increase innovation opportunities which meet the needs of the evolving behavioral health market. Suzanne has supported this industry for 25+ years, with a background in clinical and financial operations as both a customer and vendor. Suzanne also partnered with the local school district to provide school nurses with the skills to help teenagers who may be experiencing a mental health crisis through the Mental Health First Aid program.



Agenda

Implementing a new EHR or other healthcare technology can be expensive and disruptive. How do you decide if the gains are worth the pains? In this session our panel will discuss how your data can help you make an informed decision before making a switch.

- Drivers for Technology in Today's World
- Indicators of Change
- 4 Stage Evaluation Process
 1. Considerations FOR Changing Technology
 2. Considerations for NOT Changing Technology
 3. Evaluation Metrics
 4. Making a Decision
- Evaluation Checklist(s)
- Summary
- Questions

Objectives

Should you consider integrating multiple technologies or look for an all-in-one solution?

How do you determine if the investment is going to drive enough revenue to pay for itself?

What are the analytics that matter and are you able to currently measure them?

Are your technology vendors thinking about and planning for the future?

Developments Driving Change In The Health & Human Service Landscape

1. The Evolving Workforce
2. The Post-Pandemic Medicaid & Medicare Landscape
3. Evolving Treatment Tech
4. Health @Home
5. Digital Primary Provider Systems
6. Retail Clinics & Amazon
7. Health Plans = Health Systems

The Big Questions

What does our tech infrastructure need to be for success in this emerging landscape?

Can't answer that question without answering the bigger question...

What will our organization's digital transformation look like?

The platform enables digital transformation to take place

– but a platform isn't digital transformation

A tech platform isn't a strategy for competitive advantage...

“Think of digital transformation less as a technology project to be finished than as a state of perpetual agility, always ready to evolve for whatever customers want next.”

Amit Zavery, VP and Head of Platform, Google Cloud

A tech platform isn't a strategy for competitive advantage...

The *OPEN MINDS* Tech Platform Framework For Community-Based Specialty Provider Organizations

Integrated Data & Analytics For Decision Making

Service Performance Optimization

Competitive Advantage

Electronic Health Recordkeeping System

- ❑ Mobile
- ❑ User optimized
- ❑ Interoperable – integration of data – medical, specialty, social support
- ❑ Consumer assessment data, measurement-based care, decision support

Hybrid Service Delivery Platform

- ❑ Virtual – telehealth, secure text, self-directed
- ❑ Home-based – electronic visit verification, route optimization, remote monitoring, smart home
- ❑ Integrated – centralized online scheduling for consumers, online scheduling of team

Consumer Experience & Engagement Platform

- ❑ Optimized end-to-end virtual consumer experience – website, social media, information, data portal, scheduling, fee schedules, billing, communication
- ❑ App/smartphone connectivity
- ❑ Consumer decision making support and treatment tools
- ❑ Health and wellbeing management tools

Value-Based/Risk-Based Reimbursement Platform

- ❑ Platform for tracking payer contract requirements and reimbursement
- ❑ Value measurement and financial risk management functionality
- ❑ Population health management tools and predictive analytics

Integrated Human Resources Information System & Financial/General Ledger System

- ❑ Financial/General Ledger System
- ❑ Automated end-to-end revenue cycle management
- ❑ Automated recruiting/talent credentialing and talent management
- ❑ Schedule management/shift bidding



Purpose of the Session

- ✓ Many organizations are unhappy with their current technologies but it takes a considerable effort to make a change so most organizations avoid this painful process.
- ✓ Very few organizations complete a structured process to evaluate the if there are significant gains to switching vendors.
- ✓ **The goal of this discussion is to guide you through a thought process that can be used to determine if switching technology solutions is the appropriate choice for your organization.**

Drivers for Technology in Today's World



Value-based care increasing the need for data



Move towards a client-centric experience with the **21 Century Cures Act** along with consumerism expectations



Staffing challenges – turnover, shortages and dissatisfaction



Exciting **advances in technology** evolving at a fast pace

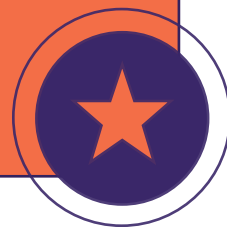


Competition within the market

Change Indicators

- Regulations
- Program requirements
- Reimbursement models

Inability to support the NEW



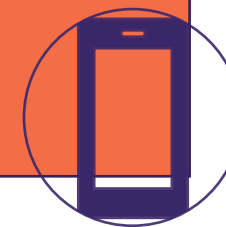
- Program expansion
- Innovative programs or ideas
- Revenue growth

Growth Inhibitors to



- Mobile / browser-based access
- Paper or manual workflows
- Access to data

Technology Barriers



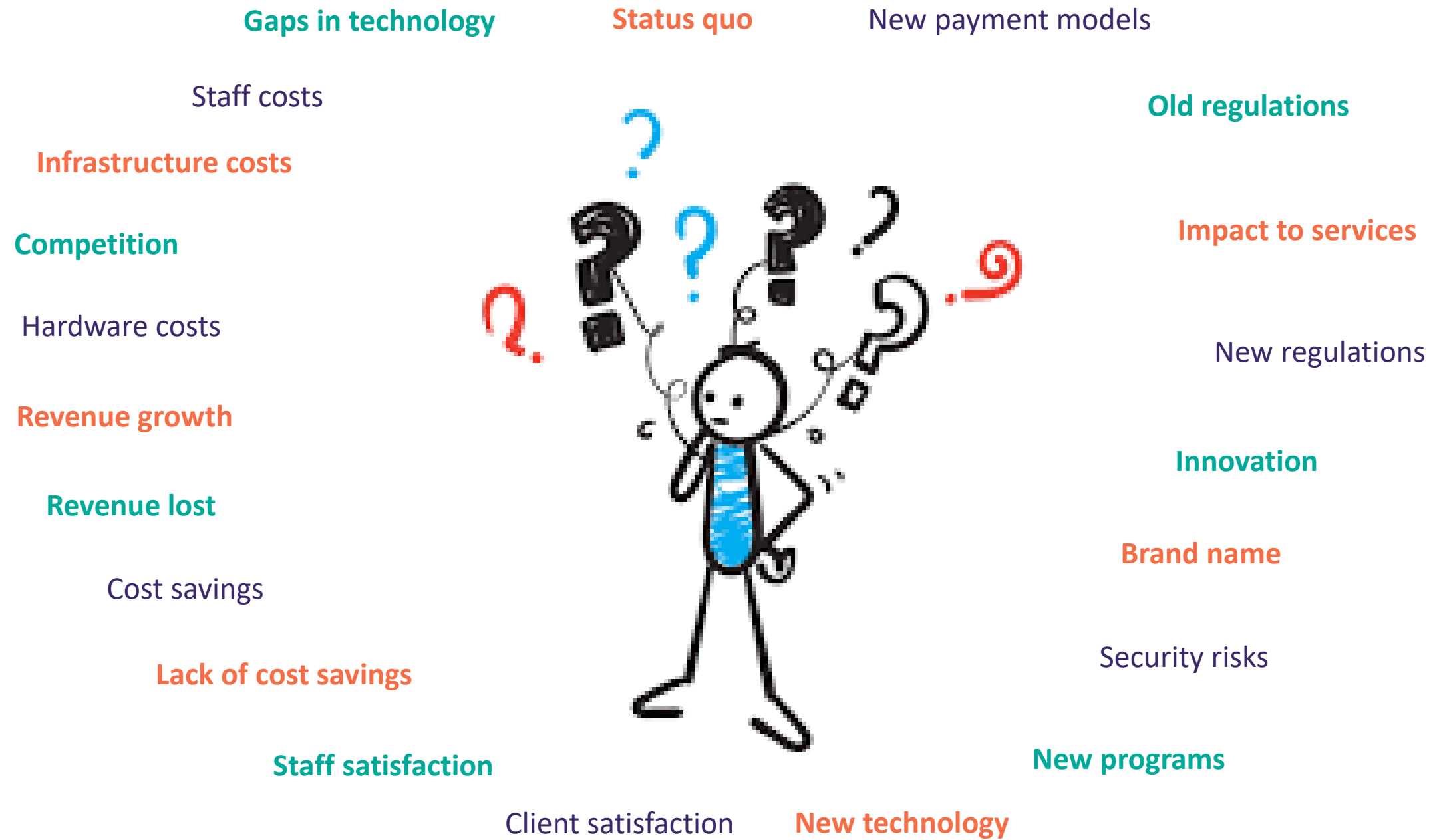
- Limited self-directed care
- Lack of virtual care
- Complaints

Consumer Experience



If there is a lack of revenue growth and cost savings, it may be time to consider a change

Getting started



Evaluation Process



1 Considerations FOR Changing Technology

- Cost of change
- Growth opportunities
- Impact to staff and clients
- Impact to vision, mission or strategic plan

2 Considerations for NOT Changing Technology

- Cost of status quo
- Cost to be competitive
- Impact to vision, mission or strategic plan

3 Evaluation Metrics

- Workflows
- Support
- Billing/RCM
- Data Access & reporting
- Patient safety
- Staff safety
- Strategy alignment

4 Making a Decision

- Financial models
- Evaluation checklist
- Total team scores

1 Considerations FOR Changing Technologies

Prepare for Change

- Staff costs during RFP / evaluation process
- Staff costs negotiating contracts
- Costs in purchase of hardware, infrastructure updates and software
- Staff dissatisfaction, turnover and costs
- Data clean-up

Implement the Change

- Cost of implementation
- Costs associated with training
- Migration of data, reports and 3rd party integrations
- Lost productivity
- Impact to policies / procedures
- Impact to contracted providers
- Impact to clients

Maintain the Change

- Ongoing hardware, infrastructure and software costs
- Ongoing training costs
- Staff turnover or transitions
- Gained productivity
- Revenue growth opportunities
- Increased satisfaction by staff and clients
- Impact to brand within the market

2 Considerations for NOT Changing Technology

- Gains from status quo
- Missed revenue growth or cost savings opportunities
- Increased costs with inefficient workflows
- New or increased costs to support inefficiencies in workflows
- Increased security risks with aging infrastructure
- Increased costs maintaining aging hardware, software, infrastructure may be hard to find
- Increased impact to clients and staff
- Brand impact



Visualization of Costs in Decision Making

Considerations for Model

- Tools that increase / decrease revenue
- Areas of cost savings or additional expenditures
- Improvements in collections (monthly, annual)
- Efficiencies which can decrease staffing or headcounts
- Improvements in no-show rates
- One-time vs recurring costs
- Financial gains/losses in new opportunities
- Build in support costs or savings

Goal of technology is to facilitate revenue growth and cost savings

- Financial modeling can be used to visualize improvements in revenue growth and cost savings
- Requires an understanding of the past performance, as well as the future expectations
- Be sure to include hidden costs (infrastructure, support, client satisfaction, staff satisfaction)
- May want to consider a financial consultant to assist with analysis

3

Evaluation Metrics

What are the problems to be solved?



Define problems trying to solve



Establish measurement points



Set your baseline



Define evaluation tool for measurement



Evaluate against vendors

Establishing Baselines

- **What is a baseline?**
 - Data or information collected to determine your current state
 - Clear data points to measure the performance of the new technology against after a change is made



[TOOL] Establishing Baselines

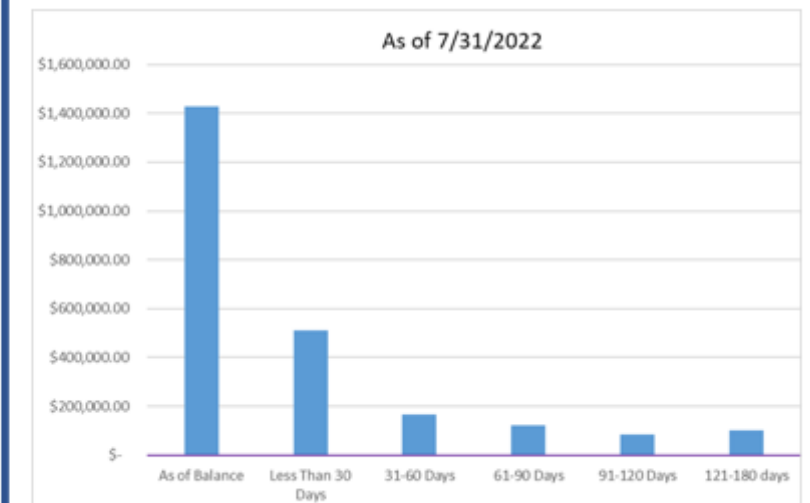
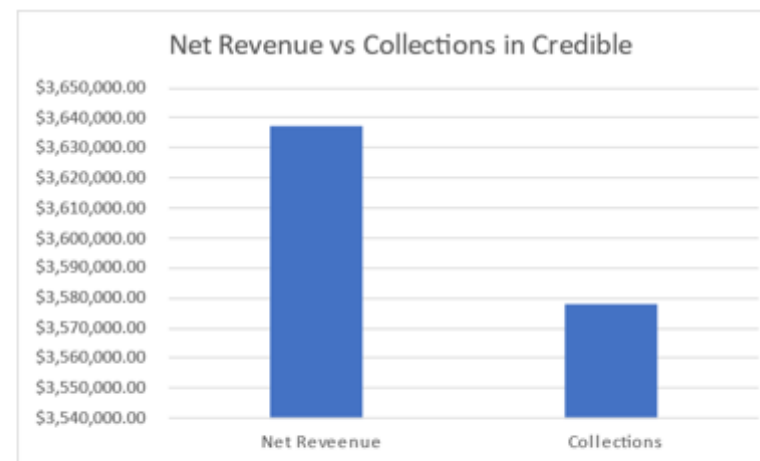
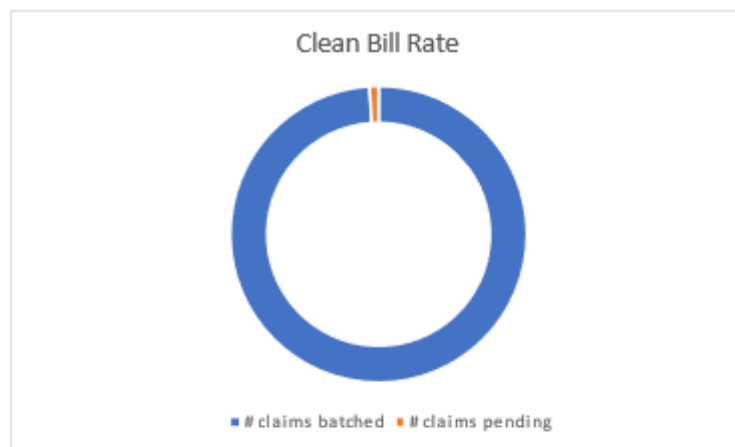
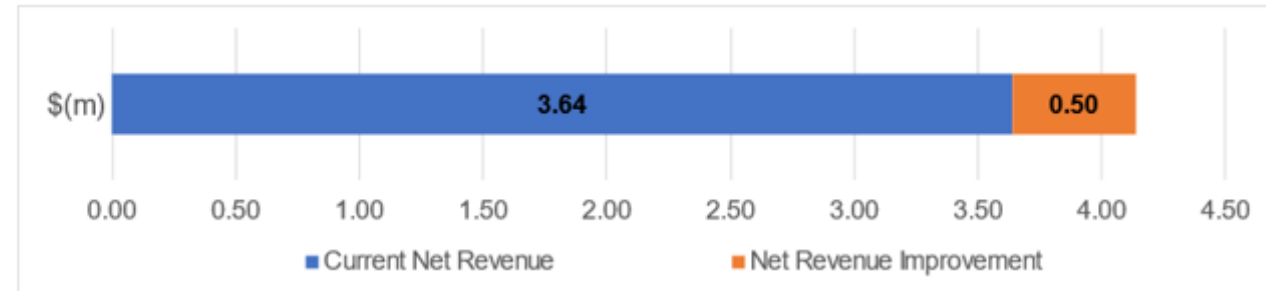
Once baselines are established, the following questions should be considered:

Considerations	Baseline A	Baseline B	Baseline C
Is this a process or technology matter?			
Is it functioning well?			
Does it need to be improved?			
Is data available to evaluate?			
Require immediate change?			
Can change be delayed?			

Example:

Baselines

CURRENT STATE



Evaluation Metrics

Workflows

Support

Billing/RCM

**Data
Access/Reporting**

Patient Safety

Staff Safety

Multiple Systems

Strategy

Understanding Current Workflows



Identify and prioritize inefficient workflows

- Completion time
- Clicks
- Impacted staff
- Impacts clients
- Cost (gained or lost)

Categorize the workflow purpose

- Clinical decisions
- Measurements
- Regulatory (federal, state)
- Billing

Measure efficiency based on industry, state or local metrics

Prioritize workflows that need to be addressed

Technology Supports

Vendor Support for Product(s)

- Ticket or request types (defects, enhancements, questions)
- Ticket resolution status (new, analysis, dev, released, validation, complete)
- Resolution statistics (waiting, days to resolution)
- Resolution satisfaction
- Visibility to ticket progression

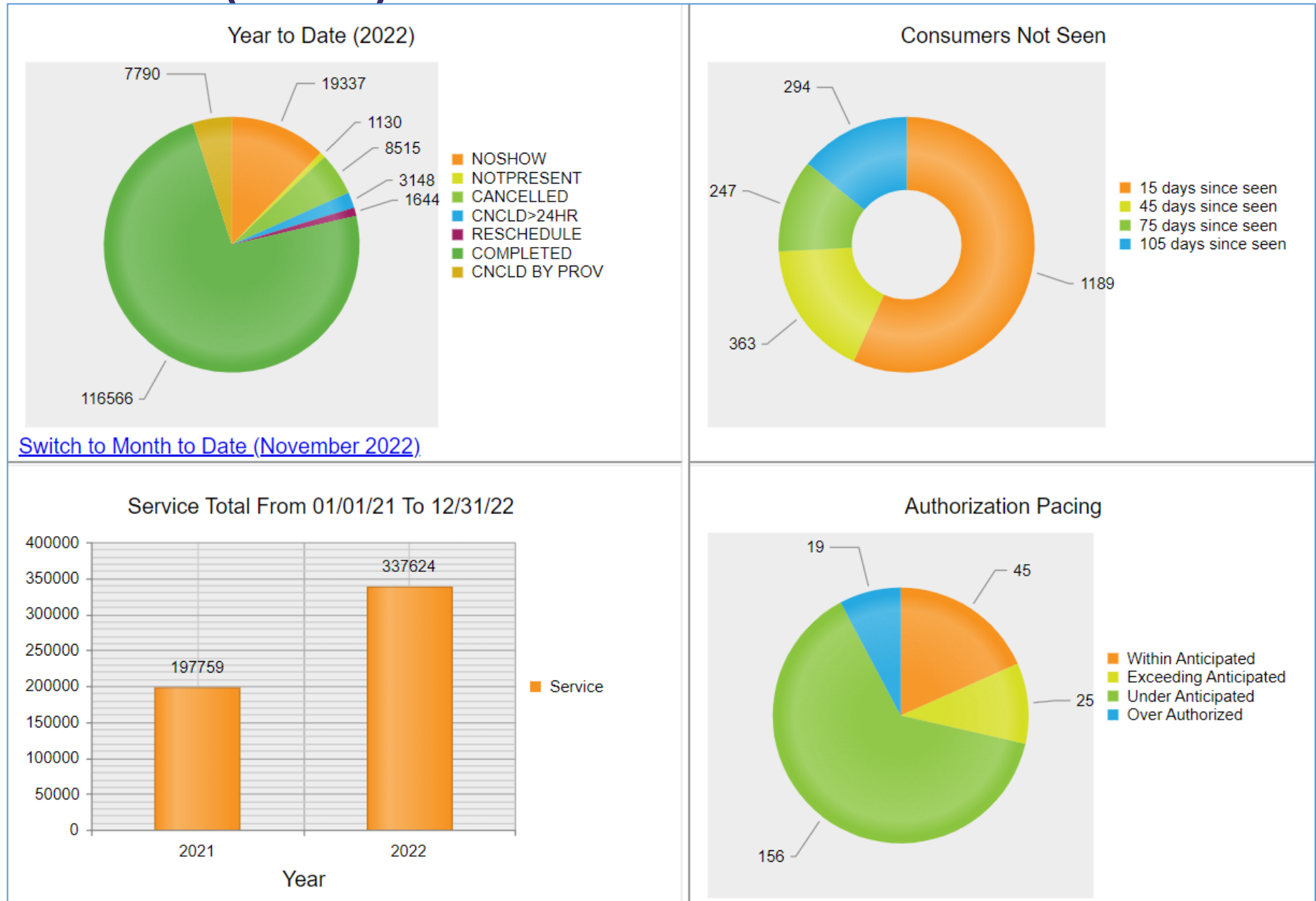
Infrastructure Support

- Self-hosted vs SaaS model
- Maintenance processes (manual, automated)
- Security risks and vulnerabilities
- FTE's for infrastructure and product support
- Resourcing concerns
- Is outsourcing a consideration?



Key Performance Indicators (KPIs)

- Days in AR
 - Target: 40 days or less
- Rejection rate
 - 5% or less
- Net collection rate
 - 95% or higher
- Aging over 90 days
 - 15% or less
- Denial inflow rate
 - 5% or less
- Days unposted cash
 - 1 day or less



[Checklist] Data Access and Reporting

Data Access		Notes
Can you access it with your preferred tools?	Y / N	
What % of your data is inaccessible?	%	
Operational Decisions		
What % of your decisions are based on readily accessible data?	%	
KPIs & Performance		
What % of your KPIs are consistently measured and monitored for performance?	%	
Do you have visibility into how to improve the data?	Y / N	
Data Strategy		
Do you have a data strategy?	Y / N	
If so, are you able to advance it? What key areas are you blocked on?		
Data Permissions		
Is data being restricted properly?	Y / N	
Actionable Data		
Are you able to see clinical trends to improve care like outcomes?	Y / N	
Are you able to customize clinical dashboards for providers/clients?	Y / N	

Patient Safety and Protection

- Threshold alerting
- Safety alerting
- Clinical decision support
- Dashboards
- Incident reporting that integrates with your technology
 - What % of incidents might have been avoided with better technology?
- Privacy protections for clients (records and specific data elements)



Staff Safety and Protection

- Warnings or notifications about clients to help de-escalate the situation
- Do you have a way to know where staff are in the field?
- Have you had incidents that could have been avoided with better technology?



Managing and Paying for Multiple Systems

Communication Across Systems

- Stand-alone systems
- Integrated ecosystem

Maintenance Across Systems

- Costs for resources
- Costs for hardware or infrastructure
- Costs for alignment of versioning

Privacy & Security Across Systems

- Consent for sharing with other apps
- Impact of 42CFR
- SSO

Growth and Innovation Strategy



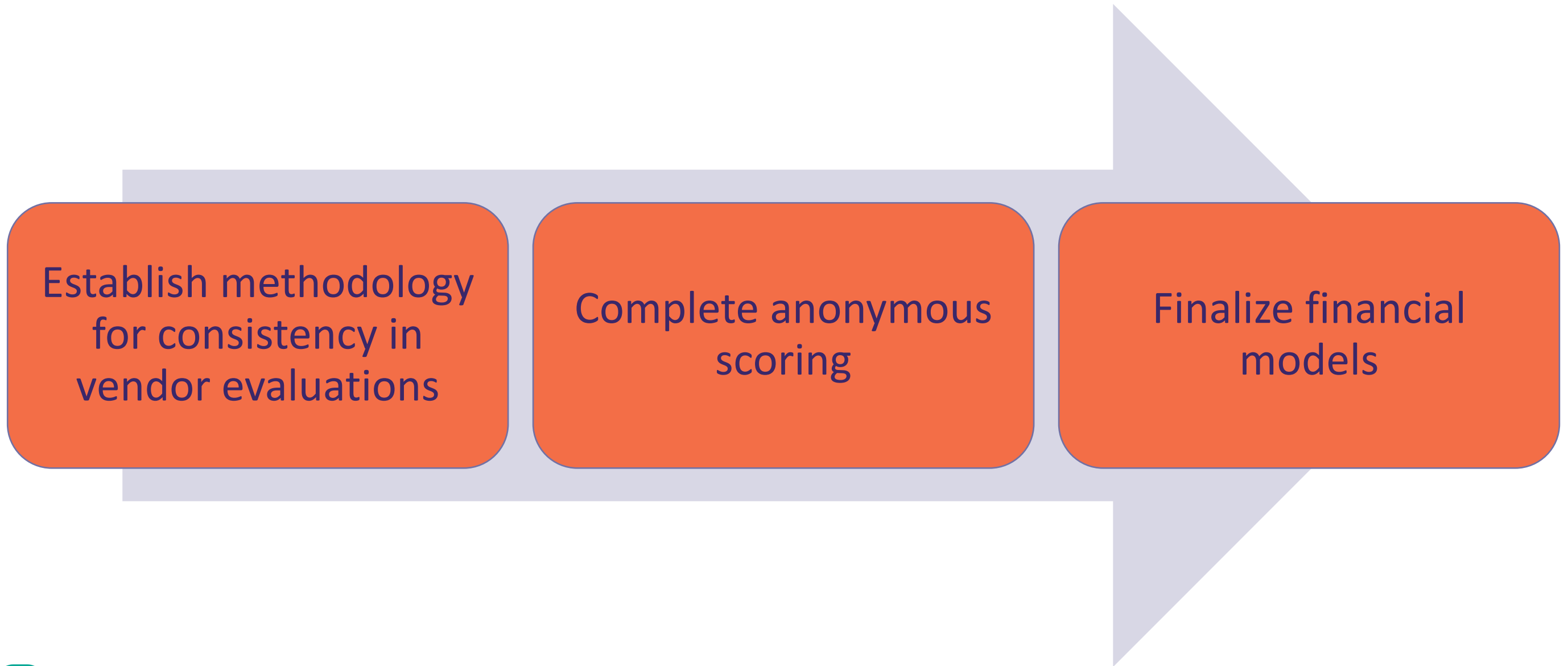
Considerations

- Define the vision and plan for growth and innovation
- Does your technology support the strategic direction of the organization?
- Is the strategic direction of vendors aligned with yours?
- Are your vendors on the cutting edge of innovative technology to supplement care or do they lag behind?
- What technology is necessary for growth and innovation?

4

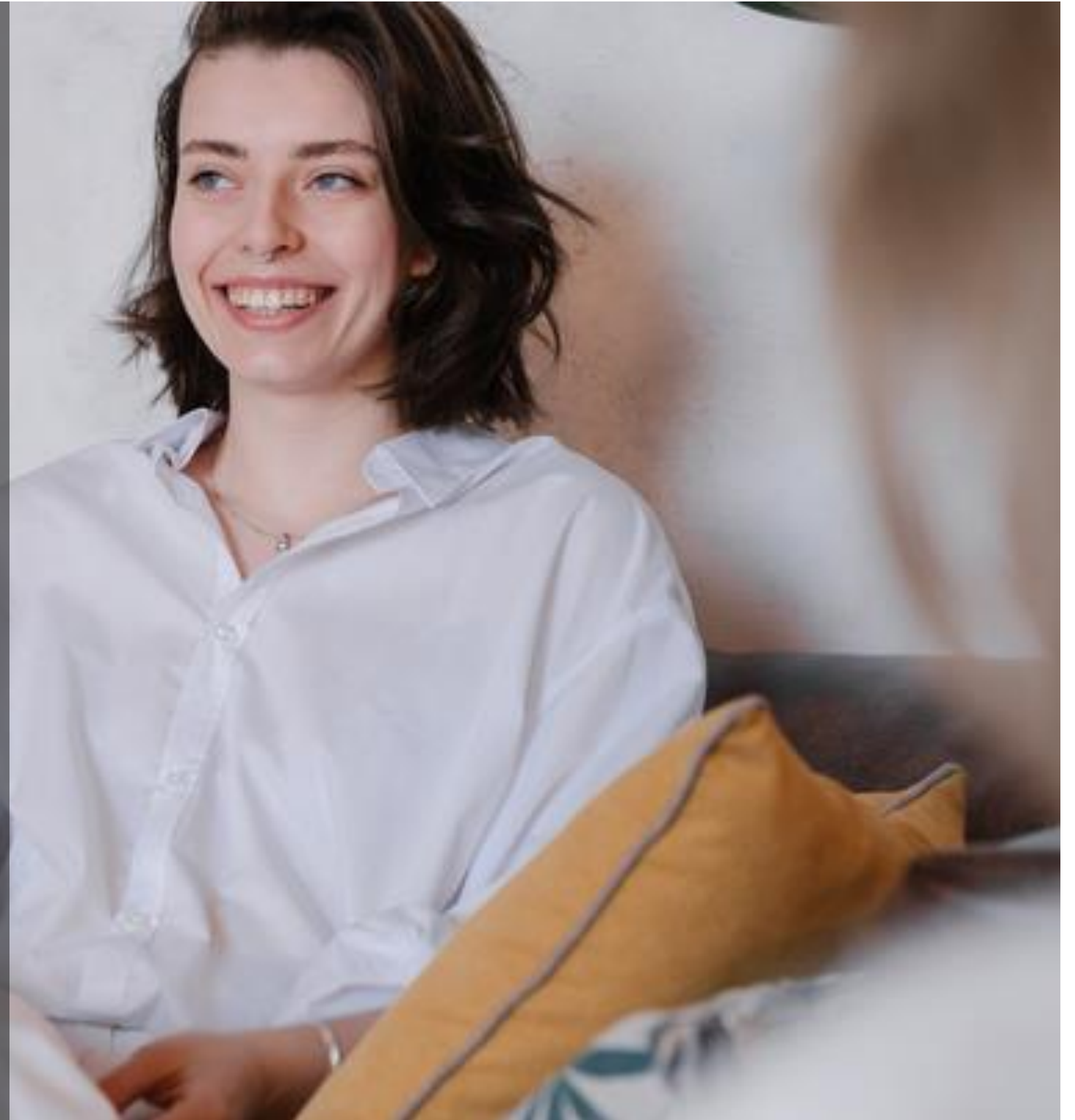
Make the Decision

4 Make the Decision



Pulling it Together

[TOOL]
**Vendor Evaluation
Checklist**



Data Informed Decision Making

1

Making the Change	Cost	Notes
Staff time and cost in the RFP/evaluation process		
Internal and external implementation costs		
Training costs		
Lost productivity		
Hardware/software/infrastructure upgrades		
Migration of data and reports		
Staff turnover		
Contract staff renewals		
New or modified policies and procedures		

Data Informed Decision Making

2

Not Making the Change	Cost	Notes
More add-on products to address functionality gaps		
Staff cost wasted on inefficient workflows		
Missed revenue opportunities		
Lost productivity		
Under billing		
Monitoring your financial health		
Not remaining competitive		

Data Informed Decision Making

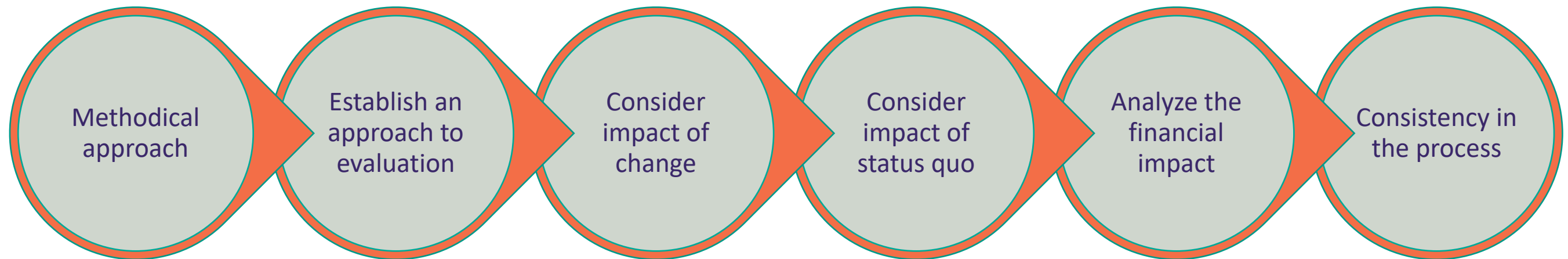
3

Evaluation Metric	Rating (1-5): 1 = no change needed, 5 = immediate change needed	Notes
Workflows		
Support		
Billing/RCM		
Data Access/Reporting		
Patient Safety		
Staff Safety		
Multiple Systems		
Strategy		
Total		

In Summary

Technology is designed to...

- Facilitate growth and cost savings
- Streamline workflows so clinicians can focus on clients
- Provide data for decision-making
- Allow clients to engage in their healthcare journey



Thank You!

Questions?

