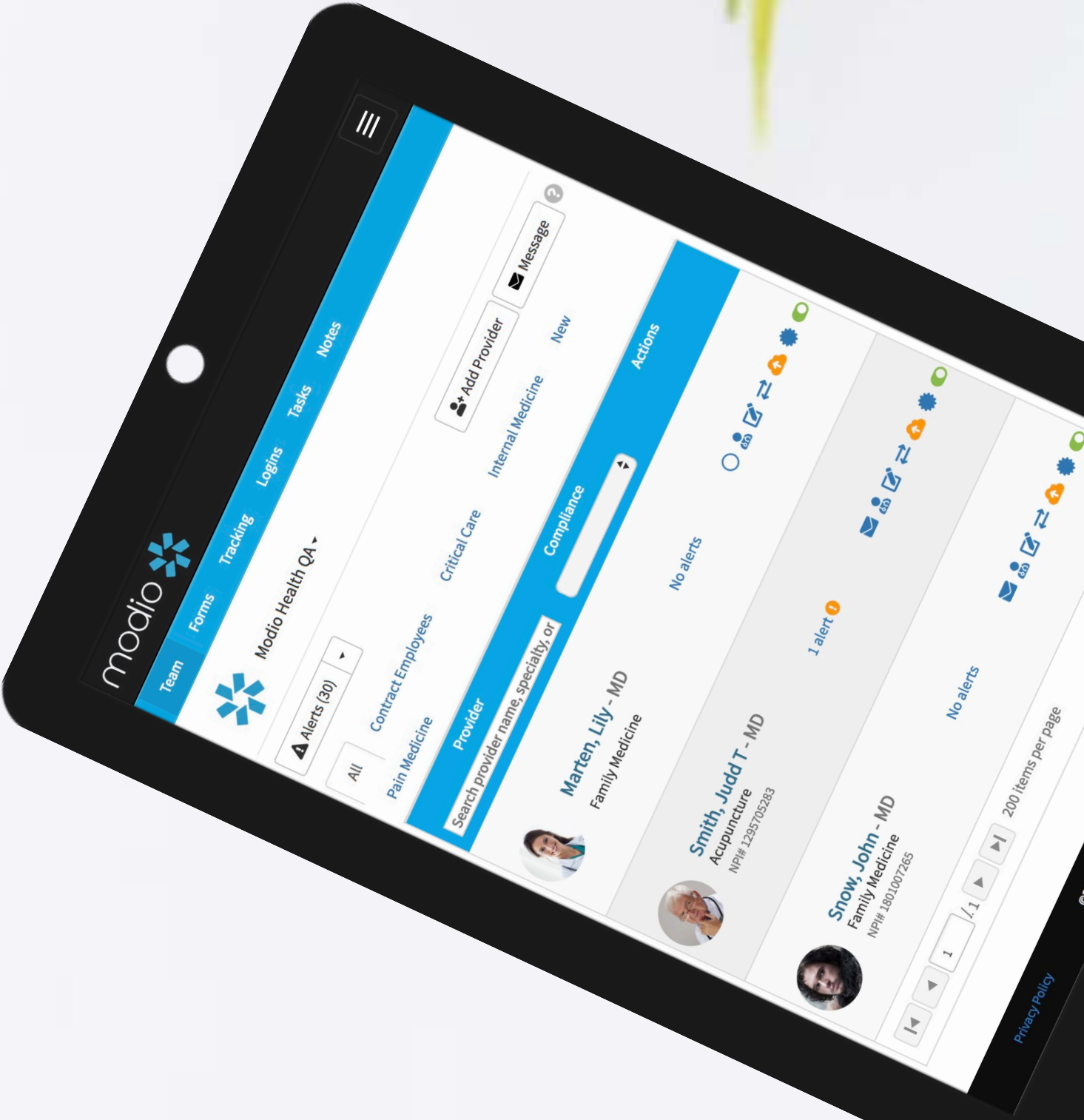


Modio U Course 106: Lessons Learned: Managing a Credentialing Team inc. Remote Staff





CHALLENGES

1. Remote work can cause communication breakdown and all communication needs to be very intentional.
2. Team members with different styles and levels of documentation or follow up on tasks can lead to inconsistent outcomes and growing pains when you bring on new team members.
3. With a remote team it's harder to get a "temp check" on bandwidth and workload of team members.
4. How do you define and measure success?

TOPICS

- Clearly defining roles & responsibilities
- Establishing timeliness standards
- Establishing documentation standards
- Identifying "at risk" files
- Managing team bandwidth/workload
- Reporting on success




Roles & Responsibilities

Clearly define roles & responsibilities for team members with Tracking

- The Tracking owner is responsible for the Tracking event.
- If it's a shared Tracking event, there should still be a single owner responsible for the success of that file. That owner can manage step assignees.

Identifying a OneView subject matter expert (SME).

- The SME is comfortable with organization's workflows in OneView.
- The SME can be a resource for new hires learning the workflows on OneView.

modio 

Welcome Claire Forgan
Support
Modio U
New Features
Settings
Services
Sign out

Team
Forms
Tracking
Logins
Tasks
Notes

New Tracking for **OneView Operations**

Details

Priority *

Normal

Start Date *

02/17/2021

☒ Use current date?

Completed Date

Status *

Pending

Owner *

Claire Forgan (claire.forgan@modiohealth.com)

Tag(s)

...


Type *

Subtype *

Provider *

Select a provider

2 FORM: Application to Provider - 5 day(s)

New - 

Paper App: Use forms to prepopulate, once complete send to client or provider directly for signature. If wet signature required, "print and sign" via DocuSign to drop the application to paper.

Online App: Reference OneView profile to complete application through payor website and obtain signature if required. If signature not required, submit on behalf of the provider.

Step Name *

FORM: Application to Provider

Assignee *


Claire Forgan (claire.forgan@modiohealth.com)

Est. # of Days

5


Est. Start Date *

02/22/2021



Est. Due Date *

02/26/2021



Step Settings

Auto-start? ☒


Exclude? ☐

Timeliness Standards

Setting timeliness standards and having this reflect on Tracking step TAT.

Some examples we've used at Modio:

- Follow up with providers for missing information or signatures weekly
- Follow up with payors and facilities for status on applications monthly
- Follow up with Boards for status on licensure apps every 2 weeks



2
FORM: Application to Provider - 5 day(s)
New - 

Paper App: Use forms to prepopulate, once complete send to client or provider directly for signature. If wet signature required, "print and sign" via DocuSign to drop the application to paper.
Online App: Reference OneView profile to complete application through payor website and obtain signature if required. If signature not required, submit on behalf of the provider.

Step Name *

FORM: Application to Provider


Assignee *

Claire Forgan (claire.forgan@modiohealth.com)  


Est. # of Days

5

Est. Start Date *

02/22/2021 

Est. Due Date *

02/26/2021 

Step Settings

Auto-start? ☒
Exclude? ☐

Documentation Standards

Establish documentation standards for status entries in OneView:

- Anywhere you can select a status from a drop-down list in OneView, establish consistency with these. There are lots of options but for reporting, you'll want to narrow down what your team uses.
- This is especially important for payor status (this is where we see the most variation)

Establish documentation standards for your different Tracking template steps. The following are the most important steps to consider establishing standards for:

- **Submission and completion steps:** how and when was the submission made (online, email, mail)? Is there a confirmation number or receipt to document?
- **Follow up and verification steps:** how and when was the follow up/verification done? Who did the team member talk to? Is there contact information or a reference number?

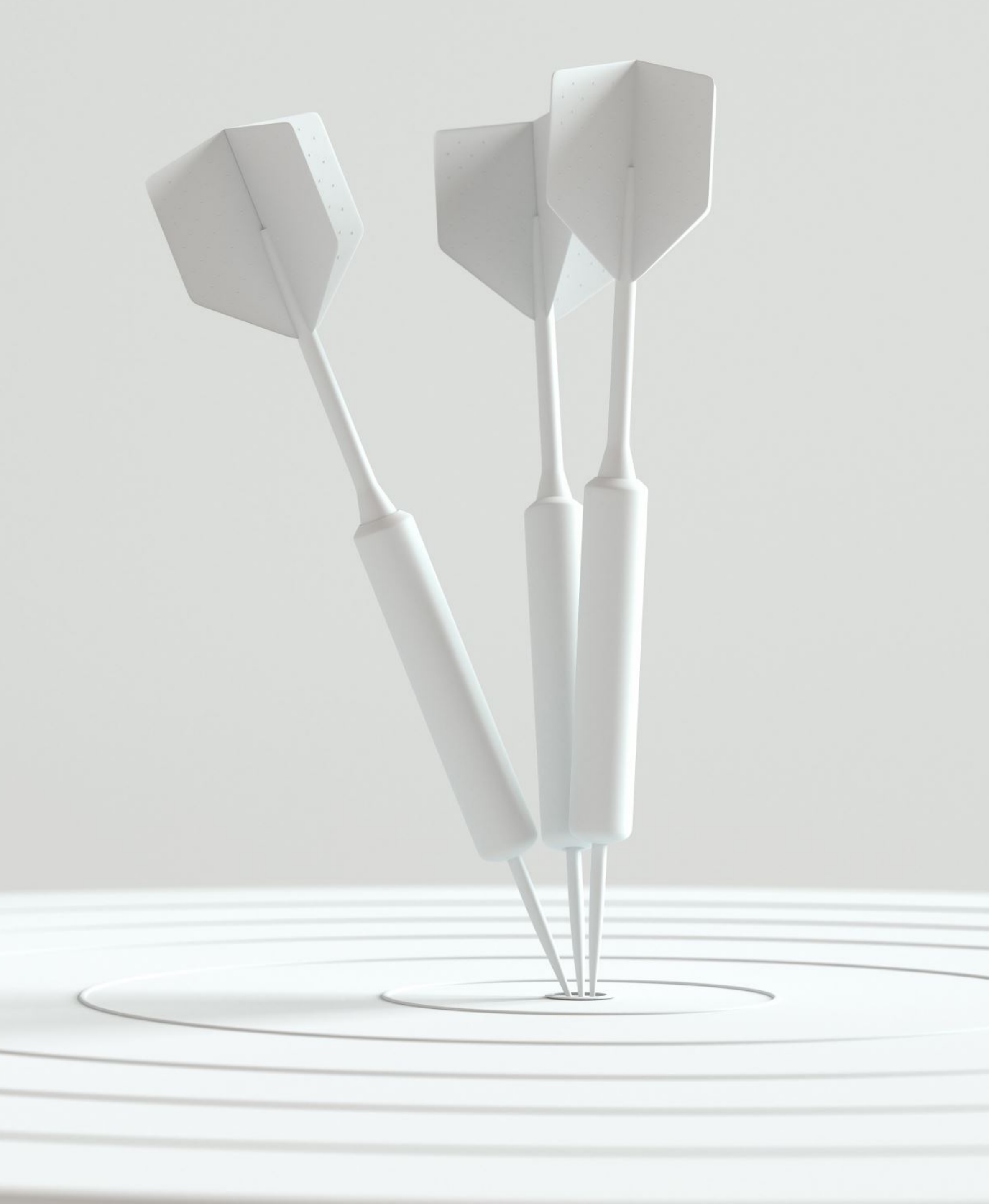
Identifying "At-Risk" Files

- Identifying "at risk" files: overdue Tracking and open Tracking with above average TAT.
- Overdue Tracking is based on TAT you set on Tracking steps and follow up dates that the team sets on steps.
- To identify open Tracking with above average TAT, pull a Tracking (all teams) report, filter for status is in progress, and look at start dates on the events.

Managing Workloads

- **Managing team bandwidth and workload for new assignments.**
- Find out what your “**workload number**” is. This is the number of work items (applications, verifications, new providers, etc) that a team member can comfortably manage at a time.
- **If your team members manage multiple types of work, you can categorize these as level 1 or level 2 work based on how time-intensive they are.**
- Ex: Submitting an initial payor application is a level 2 and submitting a recred application is a level 1.
- **Use Tracking page or Tracking report to see summaries of team workload by team member.**





Reporting on Success

How do you define and measure success?

- TAT (average and month over month)
- Volume of overdue Tracking (snapshot metric)
- Volume of completed Tracking (month over month)

If you aren't monitoring metrics and are interested in starting, start by pulling baseline metrics with a Tracking report. Based on those, you can set metric goals and communicate those to your teams.

Metric to drive continuous improvement: completed Tracking with long TATs.

Next Steps

What to do next as a leader?

1. Identify a OneView SME
2. Establish timeliness and documentation standards for your team
3. Determine your team's "workload number"
4. Download a Tracking report to determine your baseline metrics

