## **Outbound Verification Process – Delay in timesheet approval and payment**

Objective: Addressing SVT(Shift Verification Team) backlog and influx of delays during our verification process and payment of our HCP’s(Healthcare Professionals)

Background information

Shift growth rate has been increasing week over week. We’ve also observed delays in timesheet verification with our HCF’s. These issues are resulting in increased HCF(Healthcare Facility) billing backlog and escalated contact volume from our HCP’s. Customer sentiment will further strain if this trend continues.

Specific: What are we doing to achieve this objective?

**Short Term Resolutions**

**Lead Huddle Workshops**

Leads will allocate their daily team huddle time for productivity workshops. This can include providing tips & tricks for either complex or everyday scenarios that they feel their team can improve upon. Case studies may also be included in their huddles to promote engagement with their team and flex their problem-solving muscles. Leads may leverage their high performing agents who have leadership aspirations to run these workshops to help further their development. It would be valuable to take time to see what the trending verification reasons are and focus in on those.

**Performance Deep Dives**

There has been a week over week decline in productivity over the last 4 weeks, resulting in a 10.8% decrease in SVT productivity. We’d like our leadership to do a deep dive on agent productivity to see where the key problem areas are. Be on the lookout for handle time, tech issues, or possible areas that need up-training. The goal is to regain that 10% loss by EOM and see week over week improvement.

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*Callout: Agents highlighted in yellow are our new hires. Shoutout to Lindra for stepping in and tackling our queues while also juggling their lead responsibilities!*

**General performance:** Bring up performance in your 1 on 1’s with all agents as you normally should but ensure it’s a prime focus for the lower performing agents. Conduct audits beforehand and take notes of any missed opportunity’s that you come across. Remember to always approach these conversations with positive intent. Set up action plans with tangible goals, for example: a daily average increase of 10 week over week until they hit the baseline expectations.

**New Hires:** Our new hires are understandably a bit behind the ball with their productivity. Let’s allocate 1-2 hours next week to have them shadow and be shadowed by a lead or one of our top performers. Due to our new hires being a small group of 3, this should be done on an individual basis and not a group to allow comfort and time to ask questions when needed. The goal is for them to pick up best practices to help shore up any areas of opportunity. Make sure action plans with tangible goals are also set.

**Long Term Resolutions**

**Time Keeping System Implementation**

Our current timesheet process is very manual and time consuming for all parties involved. I propose the implementation of a workforce software, such as Kronos, to act as a timesheet. The goal is to have a user-friendly interface where HCP’s can log their time and a quick way for HCF’s to review discrepancies and update them in real time without the need for phone contact.

**Step 1:** HCP’s and HCF’s are given an ID number when they sign up for the service. HCP’s will have an “Employee ID#” and HCF’s will have a “HCF ID#”. When logging in to the portal they will utilize the email they used to sign up for the service.

A screenshot of a login box

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**Step 2:** After signing into the portal, a HCP will select “Click to Submit Time” to go to the clock in screen. Alternatively, they can view prior paystubs, view any local employment laws (big for travel nurses), and edit any settings.

A screenshot of a computer

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**Step 3:** HCP’s select the HCF they’re currently working with in the dropdown circled below. The HCP can type in the HCF ID# or the name of the facility. Once selected, HCP’s can simply click “Clock In” or “Clock Out” when starting their shift, taking breaks, and ending their shift. The view on the right is an easy way for HCP’s to view their hours at a quick glance.

Graphical user interface

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**Step 4 (Optional):** This view can be accessed by both the HCP and HCF. As in step 3, a HCP can select the HCF within the dropdown so they can view and adjust their time sheet depending on the facility selected. HCF’s and our SVT can edit the timesheet as needed and leave any notes within the comment symbol circled below. This provides a more comprehensive view and makes it easy to pinpoint any discrepancies.

A screenshot of a computer

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**Contact Preferences**

HCF’s will now have provider profiles assigned to them based off their HCF ID#. This profile contains all their contact information and allows them to select their “Preferred Contact Method”. For example, a HCF can select “Email address” to communicate via email only if they believe this is their most responsive option, thus eliminating some of our outbound call volume. They can also opt out of calls altogether by selecting the “Do Not Call” option. Finally, provider comments can be filled out by our SVT’s or HCF’s for any relevant information regarding their facility.

Graphical user interface, text, application, email

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**Response Time Update**

[Decoy Company’s] customer base has found continuous growth, and due to that growth, we need to have more accountability for HCF’s. In current state, there is no binding response rate for HCF’s when it comes to billing concerns and is resulting in delayed payment for our HCP’s. Due to this I’m proposing the following:

Moving forward, HCF’s will now be bounded to a response time of 48 business hours. Failure to respond to billing concerns within that timeframe will result in a 3% interest tagged on to billed hours (I.E. if a HCF responds late for a $1,000 payment they will be charged an extra $30 fee). An extra 3% will be added for every 48 business hours they are late to respond.

**We will also be promoting a new incentive for quick response time!** HCF’s who consistently have a same-day turnaround for billing inquires will receive a “Top Provider” badge attached to their facilities profile. This will drive more HCP traffic to their facility and is a win-win for everyone involved.

Measurable: How will we measure the success of this initiative?

**Agent productivity:** We’re attempting to improve productivity for our new and underperforming agents. The goal is to showcase incremental growth on an agent-by-agent basis until their daily average reaches 125. The baseline of 125 was decided due to the daily average of all agents combined resulting in 125.

**HCF Response Time**: Currently HCF response time can be as high as a few weeks. The combination of the quick turnaround time incentive plus the late penalty fee should drop the average response time to 1-3 business days. We can use our current reporting and forecasting to track this metric.

**Call Volume:** With the implementation of the “preferred contact method” option there should be a dip in outbound call volume in favor of email contacts. Faster HCF response time will also lower the number of inbound calls from upset HCP’s. Current call reporting can be utilized to monitor daily call volume.

Attainable: How will we achieve these initiatives?

Lindra will have their focus on 1 on 1’s, audits, and workshops. Chris will regularly meet with team leads to make sure the huddle workshops and performance deep dives are delivering projected results – he will be a main point of contact for any concerns. Chris and Scott will be meeting with legal and accounting to propose the response time/late penalty fee initiative as well as review department budget to facilitate the implementation of the online timesheet portal. Upper leadership will meet with tech to get our time keeping system and HCF profiles rolled out.

Relevant: Why are we doing this? What’s the point?

**The Problem:**

HCF’s are having long turnaround times (sometimes weeks) to get back to us on billing and timesheet inquiries. This is causing HCP’s to be paid late and results in them calling into our contact center, increasing our inbound volume. Our outbound volume is also negatively affected due to consistent follow-up contacts and our growing customer base.

**The Future:**

The short-term solutions will help agents keep up with the increasing volume while our long-term solutions are in development. The new timekeeping system, HCF contact preferences, and new response time accountability will ease a lot of volume coming into and out of the contact center. The new time keep system will result in less SVT contacts and a smoother experience for HCP’s and HCF’s. HCF contact preferences will allow some providers to only communicate via email which will eliminate a lot of phone volume – email templates will help handle time tremendously. Response time accountability will improve customer sentiment due to being paid quicker, lower outbound contacts, and create a new revenue source for [Decoy Company] that can be leveraged for other initiatives.

Timebound: So, when is everything Happening?

* Huddle Workshops – Beginning 8/8 until 8/19 (may be extended based off team performance) – Lindra
* New Hire Shadowing – Completed by 8/19 – Lindra and/or top performing agent
* Performance Deep Dive – Completed by 8/12 - Lindra
* Meeting with legal, tech and accounting to discuss budget and initiatives – Completed by 8/17 – Scott & Chris
* Timesheet Implementation w/ Employee ID numbers – Rolled out by 10/24 – Scott & Chris
* Contact Preferences & HCF Profiles – Rolled out 10/3 – Scott & Chris
* Clinic Response Time Update – 10/34 – All upper leadership