RCM dashboarding suite

(Behavioral health provider)

Provided real-time visibility into the key metrics across the revenue cycle and provided insights into the high priority action items for the Utilization Review, Billing and Finance teams to mitigate leakages in revenue

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Behavioral health provider needs RCM dashboarding suite

Picture this…

You're looking to provide real-time visibility into the key metrics across the revenue cycle and provide insights into the high priority action items for the utilization review, Billing and finance teams to mitigate leakages in revenue. Currently, you have limited visibility into the RCM cycle in terms of identifying the key trends and high impact action items for the RCM & finance teams to prioritize. Also, you need to reduce people dependency in getting any visibility, due to exits.

You turn to Accordion.

We partner with your team to provide real-time visibility into the key metrics across the revenue cycle and to provide insights into the high priority action items for the utilization review, billing and finance teams to mitigate leakages in revenue, including:

1) Building utilization review dashboard to track authorizations and denials related KPIs and help deep-dive into the patient-level UR details
2) Providing visibility into total unbilled charges by patient discharge status and days since discharge to help the team prioritize the charges from billing perspective so that there are no delays in claims processing and collections.
3) Tracking claims by statuses along with the corresponding trends and help prioritize the team's efforts for handling rejected claims
4) Providing visibility into the AR aging, AR Roll-forward aging trends, its drivers and into the collection efficiencies
5) Tracking insurer and patient payments /refunds in the historic billing months and the previous day, their trends and drivers
6) Estimating Customer Financial Responsibility to identify the top admits/ discharges driving the outstanding ECFR for action
7) Enabling the existing data warehouse to be a single source of truth by setting-up python-based data pipelines and automating claims and billing data ingestion from third party sources via APIs and web scraping

Your value is enhanced.

- Reduction in rejected claims on a daily level by ~70% with improvement in clean claim rate by 2% through RCM dashboard suite
- The daily unbilled report helped prioritize the charges and helped reduce the unbilled charges post-discharge from ~$4.5M to under a million USD
- You were able to single out the unused authorized days and act on unauthorized patient days to plug possible revenue leaks

RCM DASHBOARDING SUITE

KEY RESULT

- Reduction in rejected claims on a daily level by ~70%
- Reduce the unbilled charges from ~$4.5M to under a million USD

VALUE LEVERS PULLED

- AR aging
- Utilization review

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Executive RCM dashboarding suite for behavioral health facilities

Situation

- Client had limited visibility into their RCM cycle in terms of identifying the key trends and high impact action items for the RCM & Finance teams to prioritize. Also, they needed to reduce people dependency in getting any visibility, due to exits.
- Partnered with the client to provide real-time visibility into the key metrics across the revenue cycle and provide insights into the high priority action items for the Utilization Review, Billing and Finance teams to mitigate leakages in revenue

Accordion Value Add

- Built Utilization review dashboard to track Authorizations and Denials related KPIs and help deep-dive into the patient-level UR details
- Provided visibility into total unbilled charges by patient discharge status and days since discharge to help the team prioritize the charges from billing perspective so that there are no delays in claims processing and collections.
- Tracked claims by statuses along with the corresponding trends and help prioritize the team's efforts for handling rejected claims
- Provided visibility into the AR aging, AR Roll-forward aging trends, its drivers and into the collection efficiencies
- Tracked insurer and patient payments /refunds in the historic billing months and the previous day, their trends and drivers
- Estimated Customer Financial Responsibility to identify the top admits/ discharges driving the outstanding ECFR for action
- Enabled the existing data warehouse to be a single source of truth by setting-up python-based data pipelines and automated claims and billing data ingestion from third party sources via APIs and web scraping

Impact

- Reduction in rejected claims on a daily level by ~70% with improvement in clean claim rate by 2% through RCM dashboard suite
- The daily unbilled report helped prioritize the charges and helped reduce the unbilled charges post-discharge from ~$4.5M to under a million USD
- Client was able to single out the unused authorized days and act on unauthorized patient days to plug possible revenue leaks

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Methodology/ Approach

Input

- Claims data from the claims management system
- Billing data such as charges, payments, patient inflow, etc. From billing system (s)
- Authorization details of insurance claims (utilization review data)
- Admits data

Analysis

- Calculate the AR days using the net average daily collectibles made in the last three months and use the values to estimate the number of days it would require to cover the remaining balance
- For the cash collection dashboard, calculate the net payments(sum of payments and refunds) received either from insurer or patient
- For the UR dashboard, calculate the number of patient days, denied days, authorized days, NAR days, pending days, etc. Using authorization data
- For claims analysis, calculate the claims submitted, claims rejected, clean claim rate and other claims-related kpis

- The RCM scorecard involves analysis of claims, billing and authorization data
- As a first step, an automated process is built to extract the data from the MOL/Allscripts billing systems, salesforce leads, and waystar claims management system
- This data is then cleaned and stored as various data tables in the database. Relevant fields from these tables are used in building automated dashboards for the RCM scorecard.
- Data validation with the clients is done based on front-end reports from EHR systems
- Aligned the wireframes and the KPIs to be captured in each of the dashboards of the RCM and developed the same using the respective tool

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Utilization review (UR) (1/3)

- UR Summary
- UR Denials
- UR Details

Utilization Review - Summary

Data Source: MOL | Facility: All | Insurer: All | LOC: All | UR Reviewer: All | Service Date: 4/1 – 11/2

Patient Days

Latest Completed Week (10/23-10/29)		Historical Weekly Average
2,767	Vs	2,782

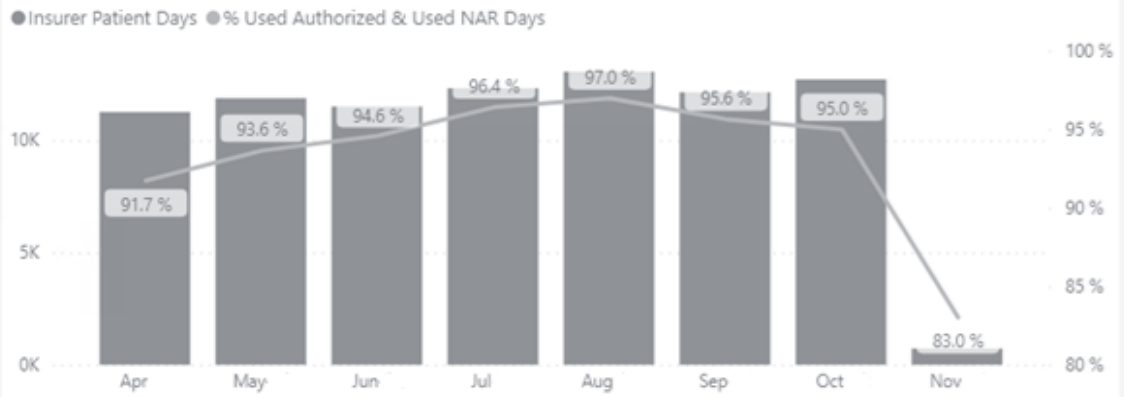
% Authorized & NAR Days

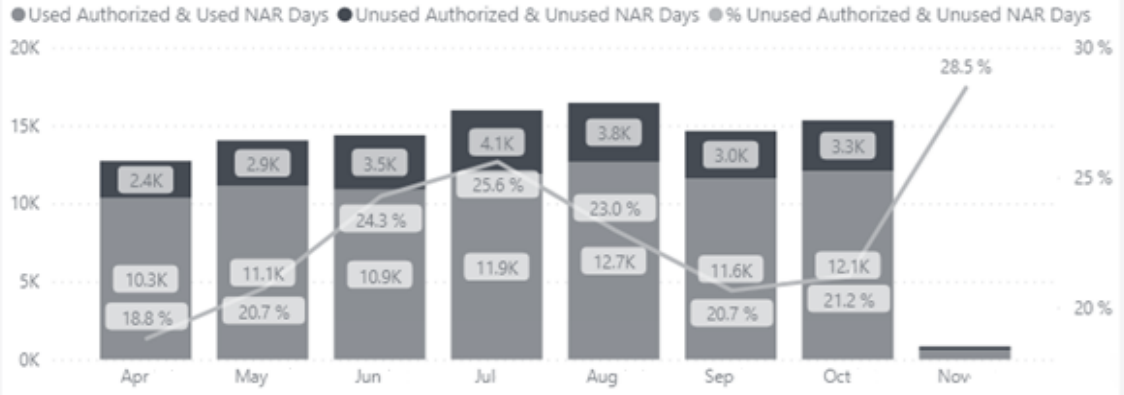
Latest Completed Week (10/23-10/29)		Historical Weekly Average
95.5 %	Vs	94.9 %

% Unused Authorized & NAR Days

Latest Completed Week (10/23-10/29)		Historical Weekly Average
23.3 %	Vs	22.1 %

dummy facility	Patient Days	% Authorized & NAR Days	%Denied	% Pending/No Auth Info	% LOC Mismatch
Facility 1	13,925	93.3 %	3.5 %	2.5 %	0.8 %
Facility 2	15,640	92.2 %	3.7 %	2.6 %	1.5 %
Facility 4	17,512	96.6 %	2.1 %	0.7 %	0.5 %
Facility 5	11,507	93.8 %	2.9 %	3.0 %	0.3 %
Facility 6	20,126	96.3 %	0.3 %	3.2 %	0.2 %
Facility 7	6,957	96.6 %	2.1 %	1.3 %	0.0 %
Total	**85,667**	**94.8 %**	**2.3 %**	**2.3 %**	**0.6 %**





Review Authorization %'s for the latest completed week and compare with historical averages along with the corresponding trends. Review trends in unused Authorized days

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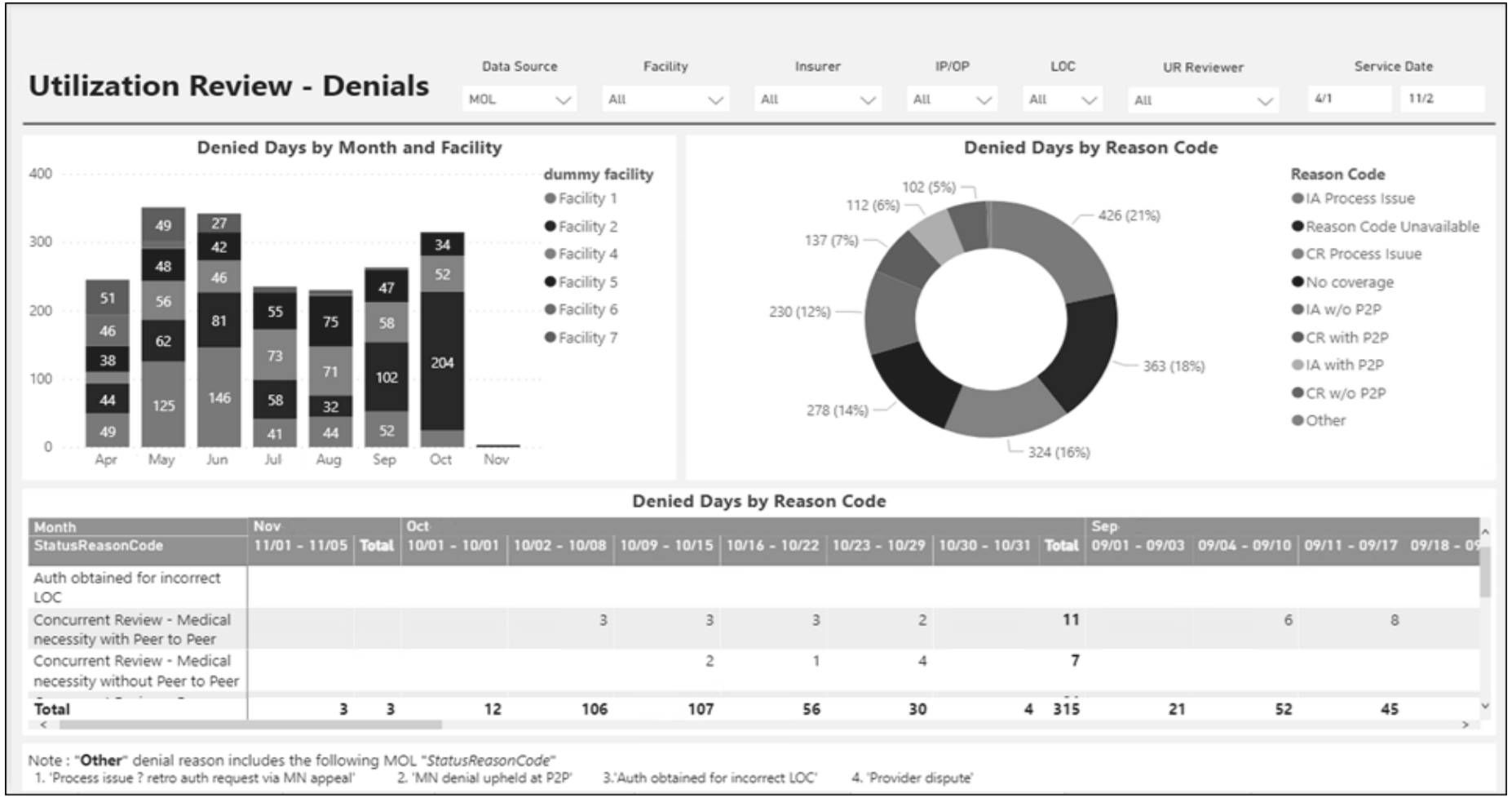
Utilization review (UR) (2/3)

- UR Summary
- UR Denials
- UR Details



Month	Nov		Oct							Sep			
StatusReasonCode	11/01 - 11/05	Total	10/01 - 10/01	10/02 - 10/08	10/09 - 10/15	10/16 - 10/22	10/23 - 10/29	10/30 - 10/31	Total	09/01 - 09/03	09/04 - 09/10	09/11 - 09/17	09/18 - 09
Auth obtained for incorrect LOC													
Concurrent Review - Medical necessity with Peer to Peer				3	3	3	2		11		6	8	
Concurrent Review - Medical necessity without Peer to Peer					2	1	4		7				
Total	**3**	**3**	**12**	**106**	**107**	**56**	**30**	**4**	**315**	**21**	**52**	**45**	

Review Authorization denials and their corresponding drivers. Identify the top reasons for denials by facility to drive any process improvements.

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Utilization review (UR) (3/3)

UR Summary

UR Denials

UR Details

Utilization Review - Trends

Data Source: MOL | Facility: All | Insurer: All | LOC: All | UR Reviewer: All | Service Date: 4/1 – 11/2

Patient Days	%Authorized & NAR Days	%Denied Days	%Pending/No auth Info	%Clinical/Auth LOC Mismatch
86K	94.8 %	2.3 %	2.3 %	0.6 %

Utilization Review KPIs by Service Week

Month	Sep			Oct							Nov		Total
	- 09/24	09/25 - 09/30	Total	10/01 - 10/01	10/02 - 10/08	10/09 - 10/15	10/16 - 10/22	10/23 - 10/29	10/30 - 10/31	Total	11/01 - 11/05	Total	
Total Patient Days	2,909	2,455	**12,166**	373	2,975	2,954	2,893	2,767	774	**12,736**	728	**728**	**85,744**
- - - - Insurer Patient Days	2,909	2,455	**12,151**	373	2,975	2,954	2,893	2,757	770	**12,722**	724	**724**	**85,667**
- - - - Self Pay Days	0	0	**15**	0	0	0	0	10	4	**14**	4	**4**	**77**
% Used Authorized & NAR Days	95.2 %	95.4 %	**95.6 %**	95.2 %	95.1 %	94.5 %	95.7 %	95.5 %	91.3 %	**95.0 %**	83.0 %	**83.0 %**	**94.8 %**
% Unauthorized Days	4.8 %	4.6 %	**4.4 %**	4.8 %	4.9 %	5.5 %	4.3 %	4.5 %	8.7 %	**5.0 %**	17.0 %	**17.0 %**	**5.2 %**
% Unused Authorized & NAR Days	19.4 %	22.5 %	**20.7 %**	23.8 %	19.0 %	20.4 %	21.1 %	23.3 %	23.9 %	**21.2 %**	28.5 %	**28.5 %**	**22.2 %**
Total Authorized & NAR Days	3,436	3,022	**14,646**	466	3,494	3,510	3,511	3,431	924	**15,336**	840	**840**	**104,416**
- - - - Used Authorized & NAR Days	2,768	2,343	**11,621**	355	2,830	2,793	2,770	2,633	703	**12,084**	601	**601**	**81,226**
- - - - Unused Authorized & NAR Days	668	679	**3,025**	111	664	717	741	798	221	**3,252**	239	**239**	**23,190**
Unauthorized Days	141	112	**530**	18	145	161	123	124	67	**638**	123	**123**	**4,441**
- - - - No Authorization Information Days	46	43	**208**	5	28	34	45	69	38	**219**	89	**89**	**1,884**
- - - - Pending Authorization Days	0	0	**0**	0	0	1	1	11	18	**31**	19	**19**	**67**
- - - - % Pending/No Auth Info Days	1.6 %	1.8 %	**1.7 %**	1.3 %	0.9 %	1.2 %	1.6 %	2.9 %	7.3 %	**2.0 %**	14.9 %	**14.9 %**	**2.3 %**
- - - - Denied Authorization Days	81	64	**263**	12	106	107	56	30	4	**315**	3	**3**	**1,984**
- - - - % Denied Days	2.8 %	2.6 %	**2.2 %**	3.2 %	3.6 %	3.6 %	1.9 %	1.1 %	0.5 %	**2.5 %**	0.4 %	**0.4 %**	**2.3 %**
- - - - Clinical/Auth LOC Mismatch Days	14	5	**59**	1	11	19	21	14	7	**73**	12	**12**	**506**
- - - - % Clinical/Auth LOC Mismatch Days	0.5 %	0.2 %	**0.5 %**	0.3 %	0.4 %	0.6 %	0.7 %	0.5 %	0.9 %	**0.6 %**	1.7 %	**1.7 %**	**0.6 %**

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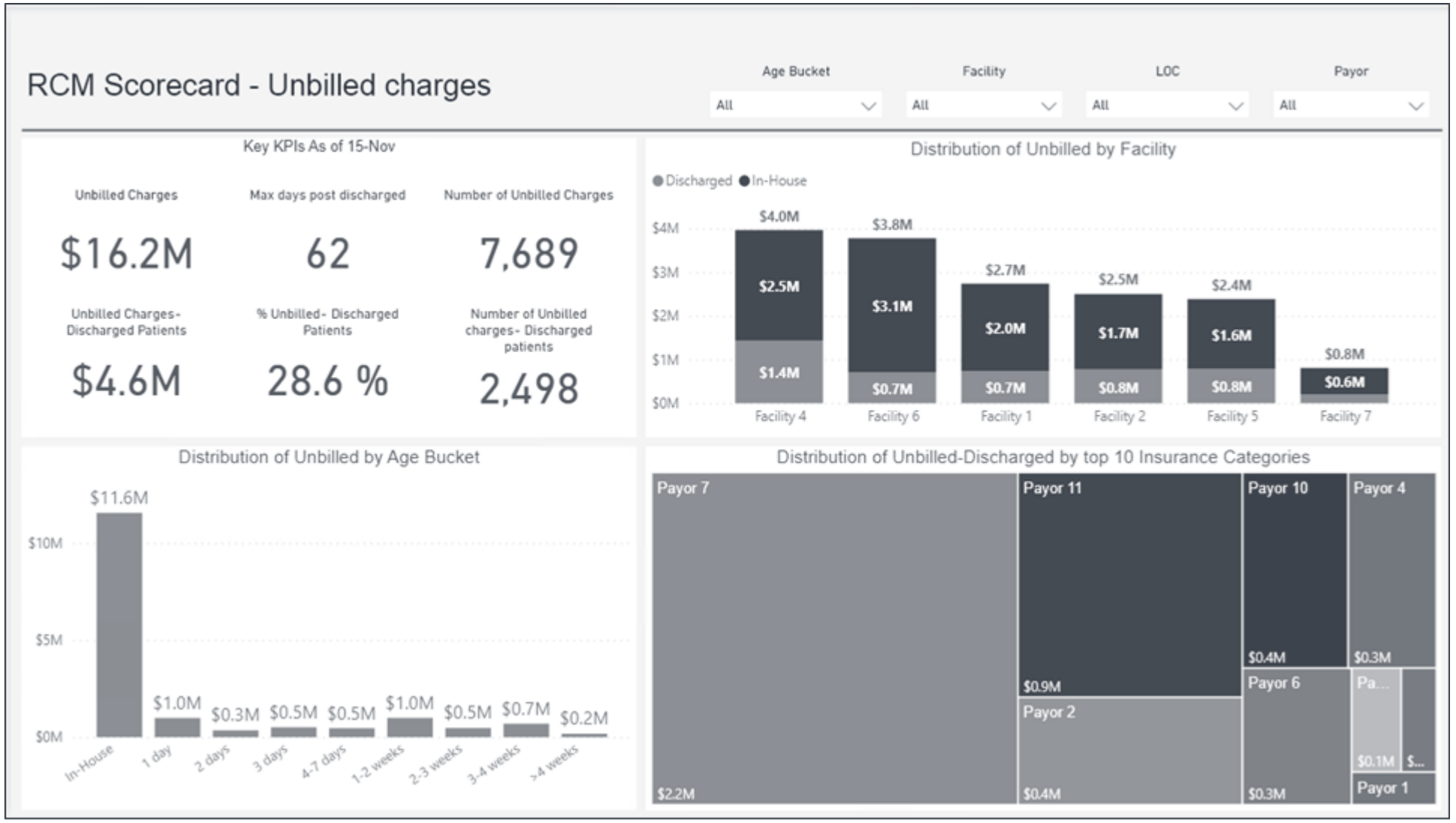
Unbilled charges (1/2)



Track the charges/vouchers for which services have been rendered but are not billed in the system. It also helps in identifying the key drivers for the client to take action to help improve their collectibles.

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Unbilled charges (2/2)

RCM Scorecard - Unbilled charges

Age Bucket: All | Facility: All | LOC: All | Payor: All

Patient Level AR Information

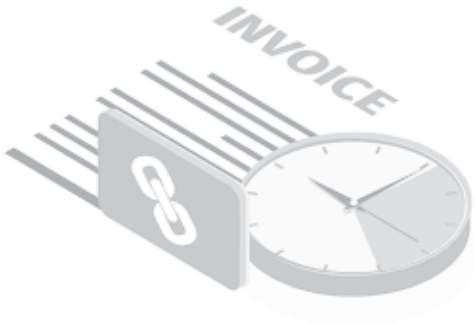
Account number	Charge ID	Facility	LOC	LOC Code	Payor	Admit Date	Discharge_date	ServiceDate	Age	Age Bucket	Unbilled Charges
Account- 2531	900995	Facility 4	Detox	IP	Payor 11	10/14	10/15	10/14	31	>4 weeks	$3,713
Account- 599	956531	Facility 1	ANC	IP	Payor 11	10/21	10/26	10/21	20	2-3 weeks	$71
Account- 1618	918248	Facility 4	ANC	IP	Payor 3	10/4	11/1	10/22	14	1-2 weeks	$15
Account- 1625	926593	Facility 4	ANC	IP	Payor 3	10/4	11/1	10/23	14	1-2 weeks	$15
Account- 1627	926592	Facility 4	ANC	IP	Payor 3	10/4	11/1	10/24	14	1-2 weeks	$15
Account- 1624	931175	Facility 4	ANC	IP	Payor 3	10/4	11/1	10/25	14	1-2 weeks	$15
Account- 1622	935438	Facility 4	ANC	IP	Payor 3	10/4	11/1	10/26	14	1-2 weeks	$15
Account- 1620	940634	Facility 4	ANC	IP	Payor 3	10/4	11/1	10/27	14	1-2 weeks	$15
Account- 1619	940633	Facility 4	ANC	IP	Payor 3	10/4	11/1	10/28	14	1-2 weeks	$15
Account- 1623	940632	Facility 4	ANC	IP	Payor 3	10/4	11/1	10/29	14	1-2 weeks	$15
Account- 1621	940631	Facility 4	ANC	IP	Payor 3	10/4	11/1	10/30	14	1-2 weeks	$15

Top 10 MR Admits by $ unbilled charges for discharged patients with Age >=3 days

Account number	Admit Date	Discharge_date	Facility	Payor	Age Bucket	Unbilled Charges
Account- 209	10/3	11/1	Facility 1	Payor 7	1-2 weeks	$3,713
Account- 216	10/3	11/1	Facility 1	Payor 7	1-2 weeks	$3,713
Account- 228	10/3	11/1	Facility 1	Payor 7	1-2 weeks	$3,713
Account- 229	10/3	11/1	Facility 1	Payor 7	1-2 weeks	$3,713
Account- 236	10/3	11/1	Facility 1	Payor 7	1-2 weeks	$3,713
Account- 2349	10/13	11/11	Facility 1	Payor 10	4-7 days	$3,713
Account- 2354	10/13	11/11	Facility 1	Payor 10	4-7 days	$3,713
Account- 2362	10/13	11/11	Facility 1	Payor 10	4-7 days	$3,713
Account- 2365	10/13	11/11	Facility 1	Payor 10	4-7 days	$3,713
Account- 2366	10/13	11/11	Facility 1	Payor 10	4-7 days	$3,713
Account- 2531	10/14	10/15	Facility 4	Payor 11	>4 weeks	$3,713
Total						$259,910

Top 10 MR Admits by Age

Account number	Admit Date	Discharge_date	Facility	Age	Unbilled Charges
Account- 2531	10/14	10/15	Facility 4	31	$3,713
Account- 599	10/21	10/26	Facility 1	20	$70.97
Account- 1424	10/2	11/1	Facility 4	14	$2,652
Account- 1425	10/2	11/1	Facility 4	14	$2,652
Account- 1426	10/2	11/1	Facility 4	14	$2,652
Account- 1427	10/2	11/1	Facility 4	14	$2,652
Account- 1428	10/2	11/1	Facility 4	14	$2,652
Account- 1429	10/2	11/1	Facility 4	14	$2,652
Account- 1430	10/2	11/1	Facility 4	14	$2,652
Account- 1431	10/2	11/1	Facility 4	14	$2,652
Total					$281,769.37



Identify the top-10 Admits that contribute to the highest Unbilled Charges for prioritization. Also identify the oldest unbilled charges in the system for action

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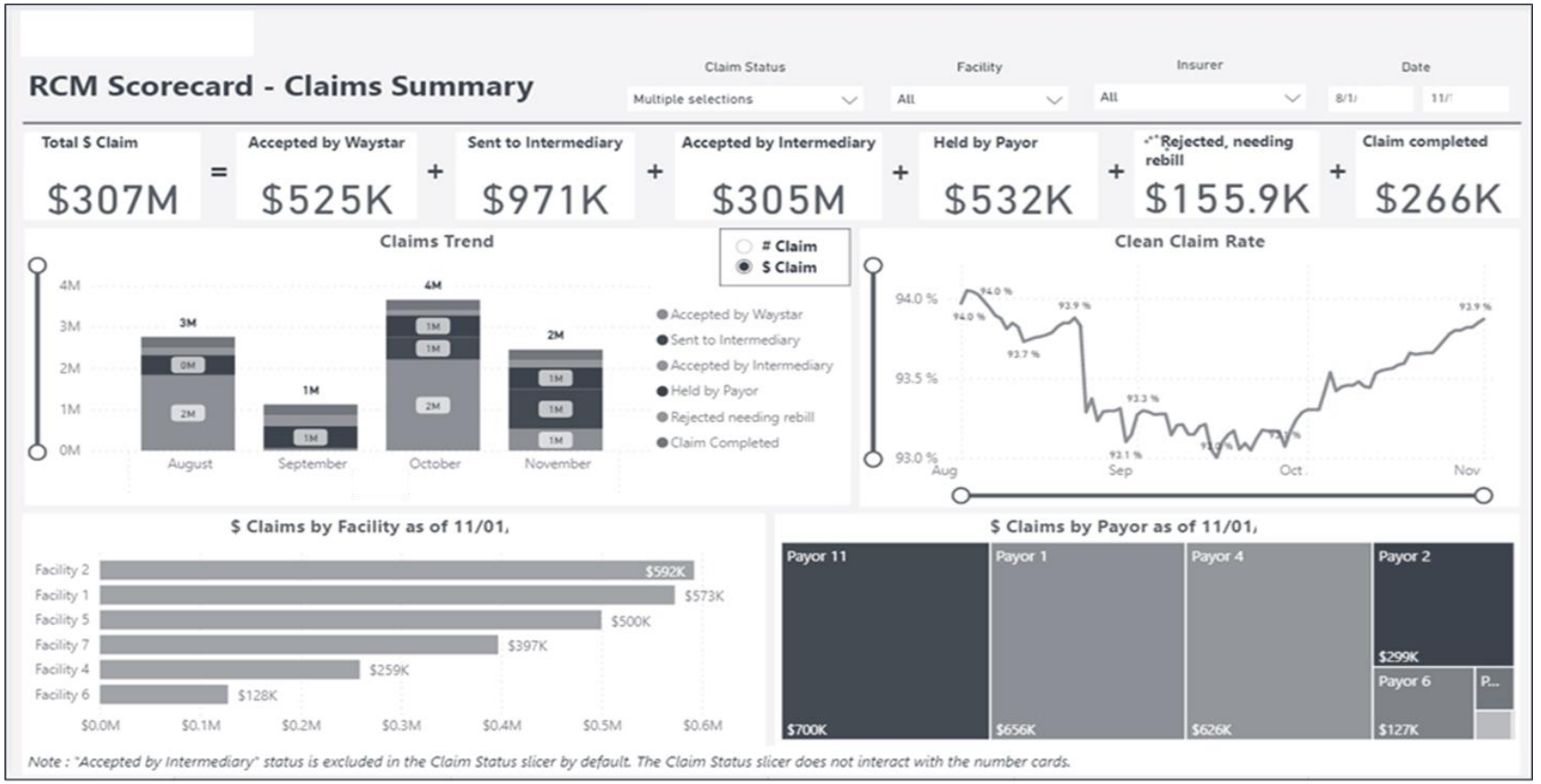
Claims analysis

The Claims Monitoring dashboard tracks the # and $ value of claims that have been submitted by the client, accepted by the clearing house, rejected/denied or approved by the payor and their subsequent details. Also helps track the clean claim rate to help the team for the executive leadership to track operational efficiency.



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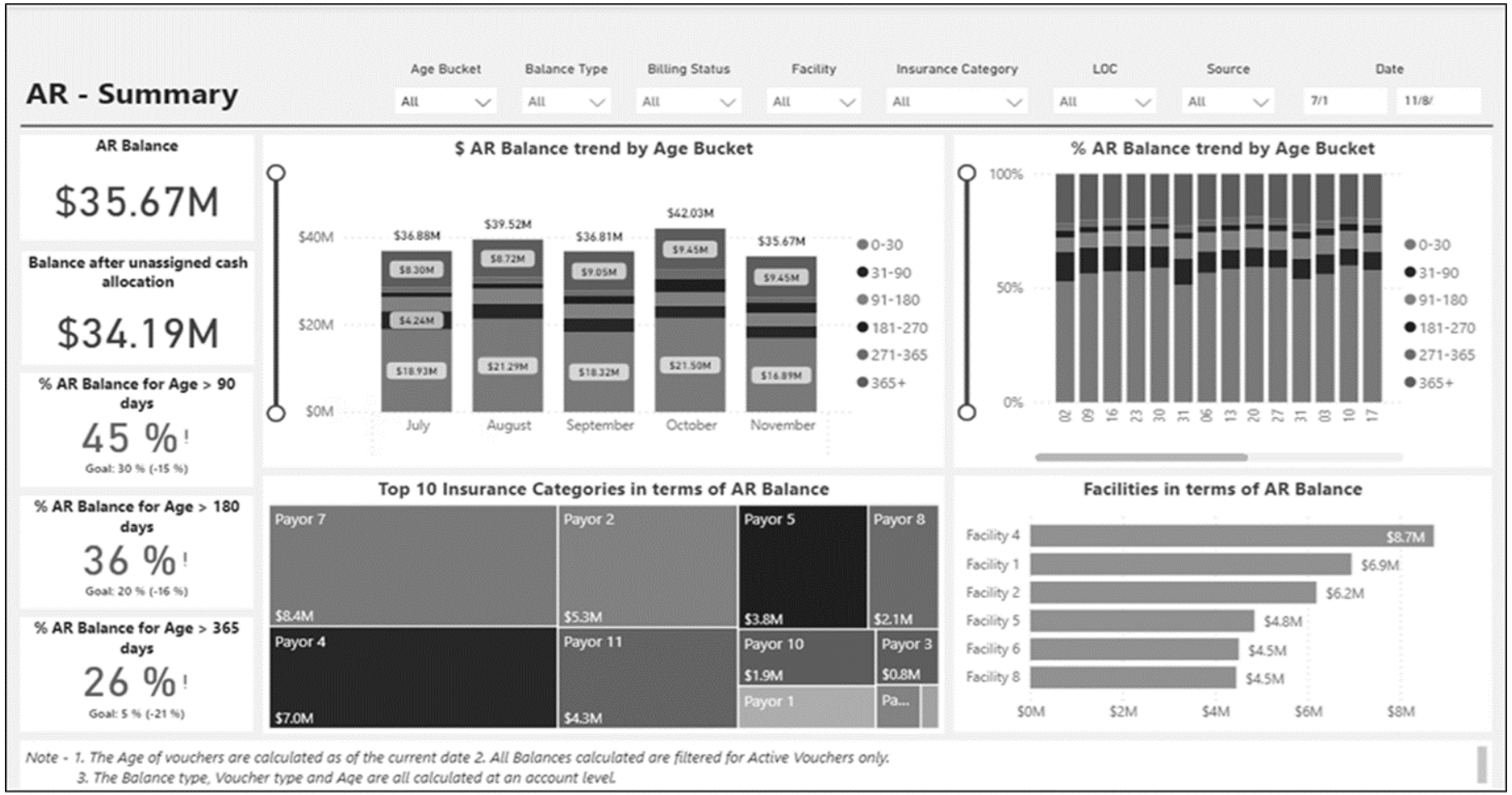
Accounts receivables (1/4)

- AR Summary
- AR Days
- AR Roll-forward



Get a quick snapshot of whether the AR aging meets the target/ performance requirements. Identify whether the trends in high aging buckets is decreasing over time. Identify the top payors responsible for the pending AR.

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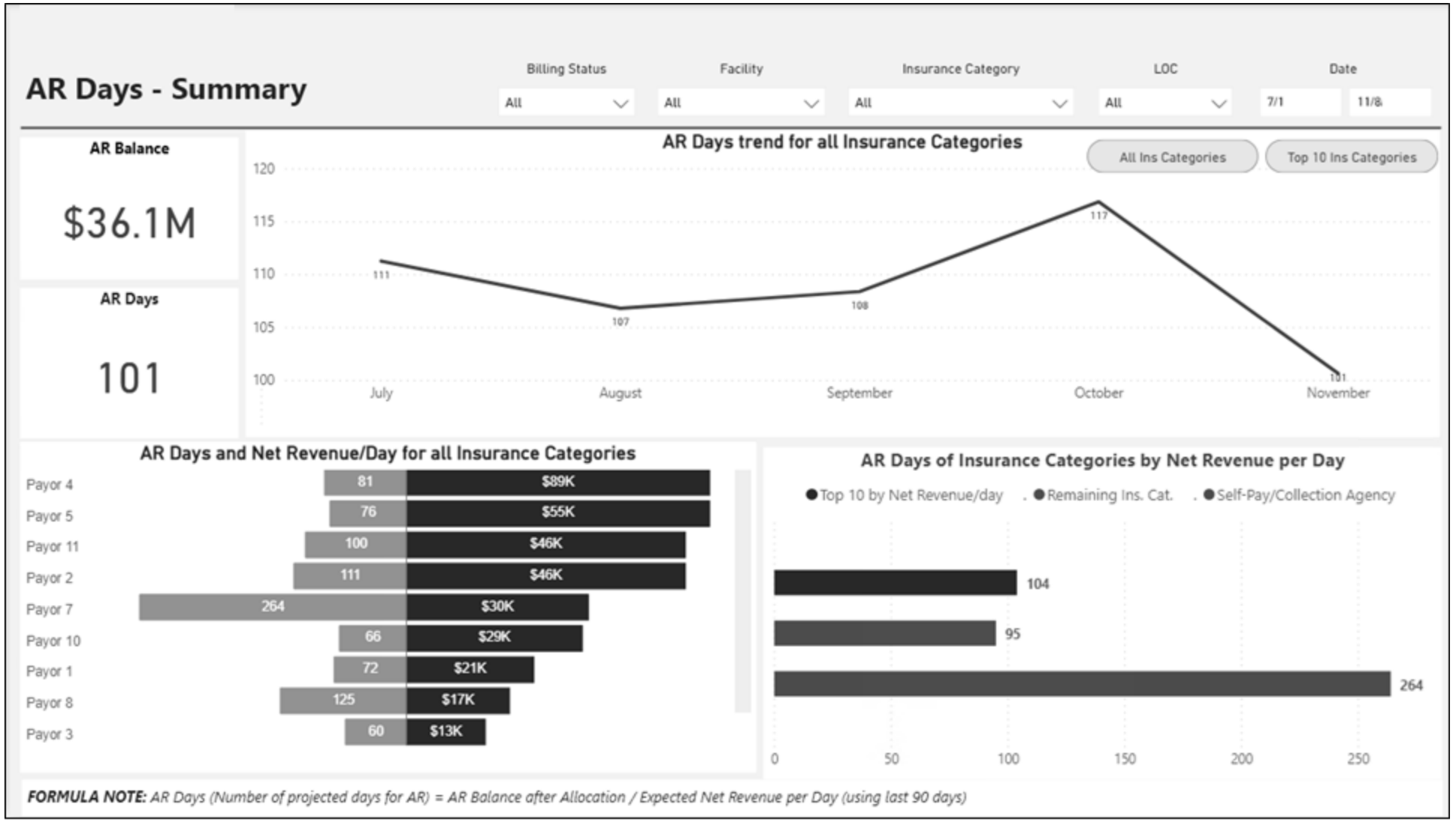
Accounts receivables (2/4)

AR Summary

AR Days

AR Roll-forward



Trends in AR Days to see operating/ collection efficiencies i.e., whether it is improving or deteriorating. Review the AR days for top 10 payors to get a representative metric for the entire business

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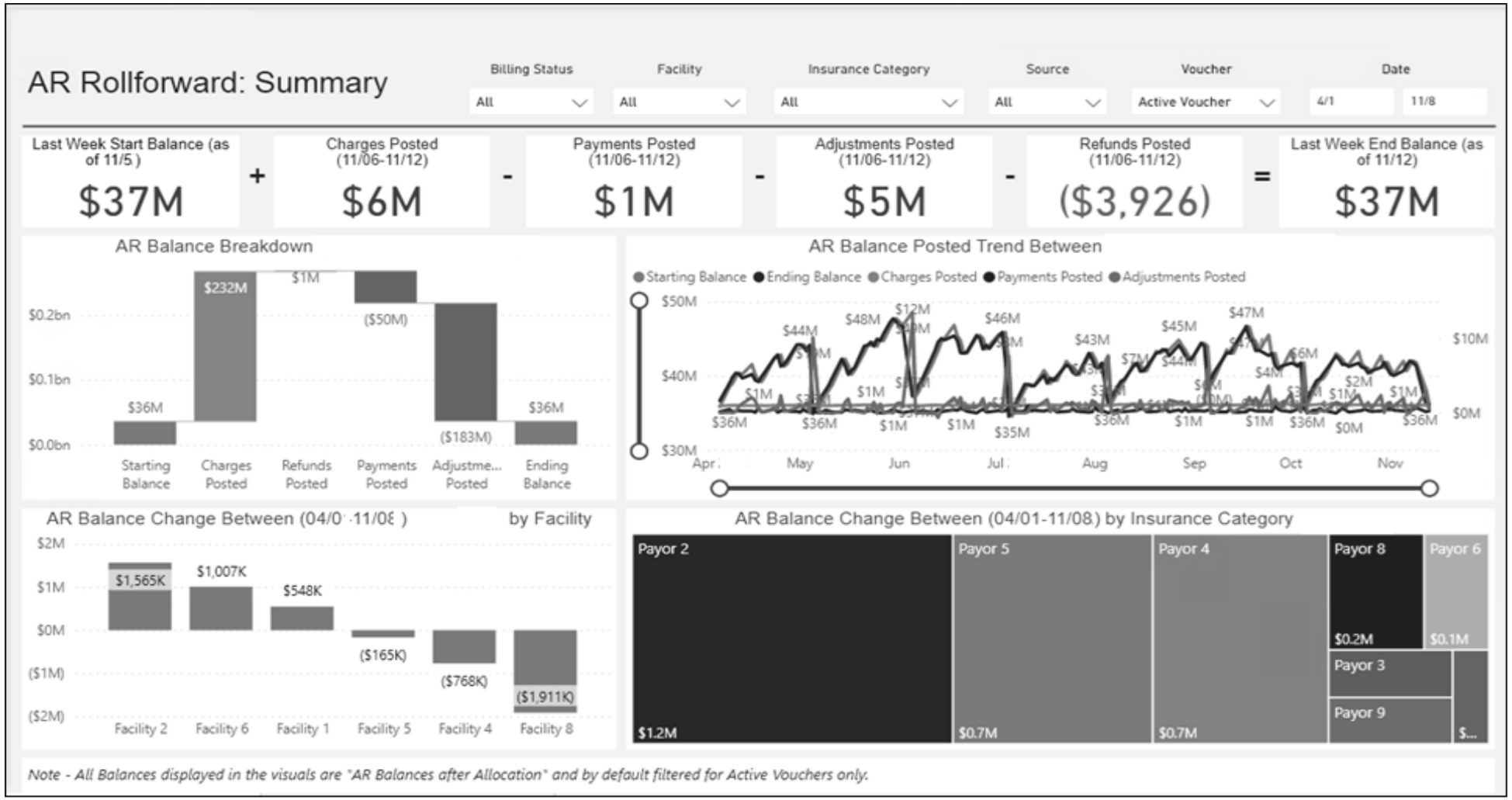
Accounts receivables (3/4)

- AR Summary
- AR Days
- AR Roll-forward



Review the AR that rolled over on a week over week basis or between any selected period along with the drivers for the roll forward i.e., at a facility or payor level. Review the waterfall break up of AR change

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Accounts receivables (4/4)

AR Summary

AR Days

AR Roll-forward

AR Rollforward: Details

Billing Status: All | Facility: All | Insurance Category: All | Source: All | Date: 10/5 – 11/15

AR Balance after Allocation by Billing Month

Billing Month	Oct												
WeekRange	10/02 - 10/08				10/09 - 10/15								
	10/5	10/6	10/7	10/8	10/9	10/10	10/11	10/12	10/13	10/14	10/15	10/16	10/17
Starting Balance	$39,387,931	$39,629,769	$40,273,176	$40,850,001	$41,917,465	$42,972,793	$42,661,848	$42,207,749	$41,511,871	$41,521,915	$41,244,291	$42,260,951	$43,294
Charges Posted	$1,192,843	$1,143,673	$1,114,166	$1,067,464	$1,055,328	$1,122,306	$1,128,399	$1,119,376	$1,123,730	$1,092,537	$1,016,660	$1,033,492	$1,117
Adjustments Posted	$380,590	$247,869	$293,800			$1,449,454	$1,289,072	$1,144,677	$738,154	$1,251,016			$2,411
----- Administrative Adjustments	($7,500)	$0	$0	$0	$0	$340	$0	$31,500	$0	($1,985)	$0	$0	
----- Bad Debt	$0	$0	$0	$0	$0	$0	$0	$0	$176	$330,443	$0	$0	
----- Contractual Adjustments	$388,090	$247,869	$293,800	$0	$0	$1,449,114	$1,273,572	$1,113,177	$671,261	$922,558	$0	$0	$2,411
----- Denial Adjustments	$0	$0	$0	$0	$0	$0	$15,500	$0	$66,717	$0	$0	$0	
Payments Posted	$614,486	$262,112	$252,008			($16,203)	$304,999	$670,577	$381,446	$119,145			$286
Refunds Posted	($44,071)	($9,715)	($8,467)	$0	$0	$0	($11,573)	$0	($5,915)	$0	$0	$0	($2,
Ending balance	$39,629,769	$40,273,176	$40,850,001	$41,917,465	$42,972,793	$42,661,848	$42,207,749	$41,511,871	$41,521,915	$41,244,291	$42,260,951	$43,294,444	$41,715

Payments Posted by Service Month

Service Month	Jan					
dummy facility	01/01 - 01/02	01/03 - 01/09	01/10 - 01/16	01/17 - 01/23	01/24 - 01/30	01/31 - 01
Facility 1	-	-	-	-	-	
Facility 2	-	-	-	-	-	
Facility 4	$171.80	$320.00	-	$35.00	$50.00	
Facility 5	-	-	-	-	-	
Facility 6	-	-	-	-	-	
Facility 8	-	-	-	-	-	
Total	**$171.80**	**$320.00**	-	**$35.00**	**$50.00**	

Net Collectables by Service Month

Service Month	Jan					
dummy facility	01/01 - 01/02	01/03 - 01/09	01/10 - 01/16	01/17 - 01/23	01/24 - 01/30	01/31 - 01
Facility 1	-	-	-	-	-	
Facility 2	-	-	-	-	-	
Facility 4	-	-	-	-	-	
Facility 5	-	-	-	-	-	
Facility 6	-	$265.44	($284.67)	($1,971.01)	($733.46)	
Facility 8	-	-	-	-	-	
Total	-	**$265.44**	**($284.67)**	**($1,971.01)**	**($733.46)**	

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Estimated customer financial responsibility (ECFR)

Insights into the collectibles from the patients that do not have a payment plan and track the percentage ECFR outstanding on a daily/weekly/monthly cadence. Identify the top 5 patients contributing to the highest ECFR outstanding for action.

ECFR Outstanding - Summary

Admit Type: All | Date Type: Admit Date | Facility: All | Payment Plan: All | Date: 1/1/ – 11/2

Total ECFR

Latest Completed Week (10/23-10/29)	Vs	Historical Weekly Average
$275K	Vs	$212K

Total Deposit

Latest Completed Week (10/23-10/29)	Vs	Historical Weekly Average
$259K	Vs	$180K

% ECFR Outstanding

Latest Completed Week (10/23-10/29)	Vs	Historical Weekly Average
5 %	Vs	15 %

Top 5 Facilities by Outstanding ECFR

dummy facility	Total ECFR	Total Deposit	ECFR Outstanding	%ECFR Outstanding
Facility 4	$3,944K	$3,340K	$604K	15 %
Facility 2	$1,241K	$993K	$248K	20 %
Facility 1	$729K	$586K	$143K	20 %
Facility 5	$1,687K	$1,549K	$138K	8 %
Facility 7	$1,111K	$980K	$131K	12 %

Top 5 Patients by Outstanding ECFR

Account	Total ECFR	Total Deposit	ECFR Outstanding	%ECFR Outstanding
Account - 29	$30,000	$10,000	$20,000	67 %
Account - 55	$16,707	$0	$16,707	100 %
Account - 73	$30,000	$15,000	$15,000	50 %
Account - 80	$29,250	$14,625	$14,625	50 %
Account - 84	$29,250	$15,000	$14,250	49 %

Note - 1. Latest completed week can be defined as the latest completed week , Sunday 12:01 AM to Saturday 11:59 PM
2. Historical Weekly Average is calculated by taking the weekly average of the respective KPI between the date range selected by the user.

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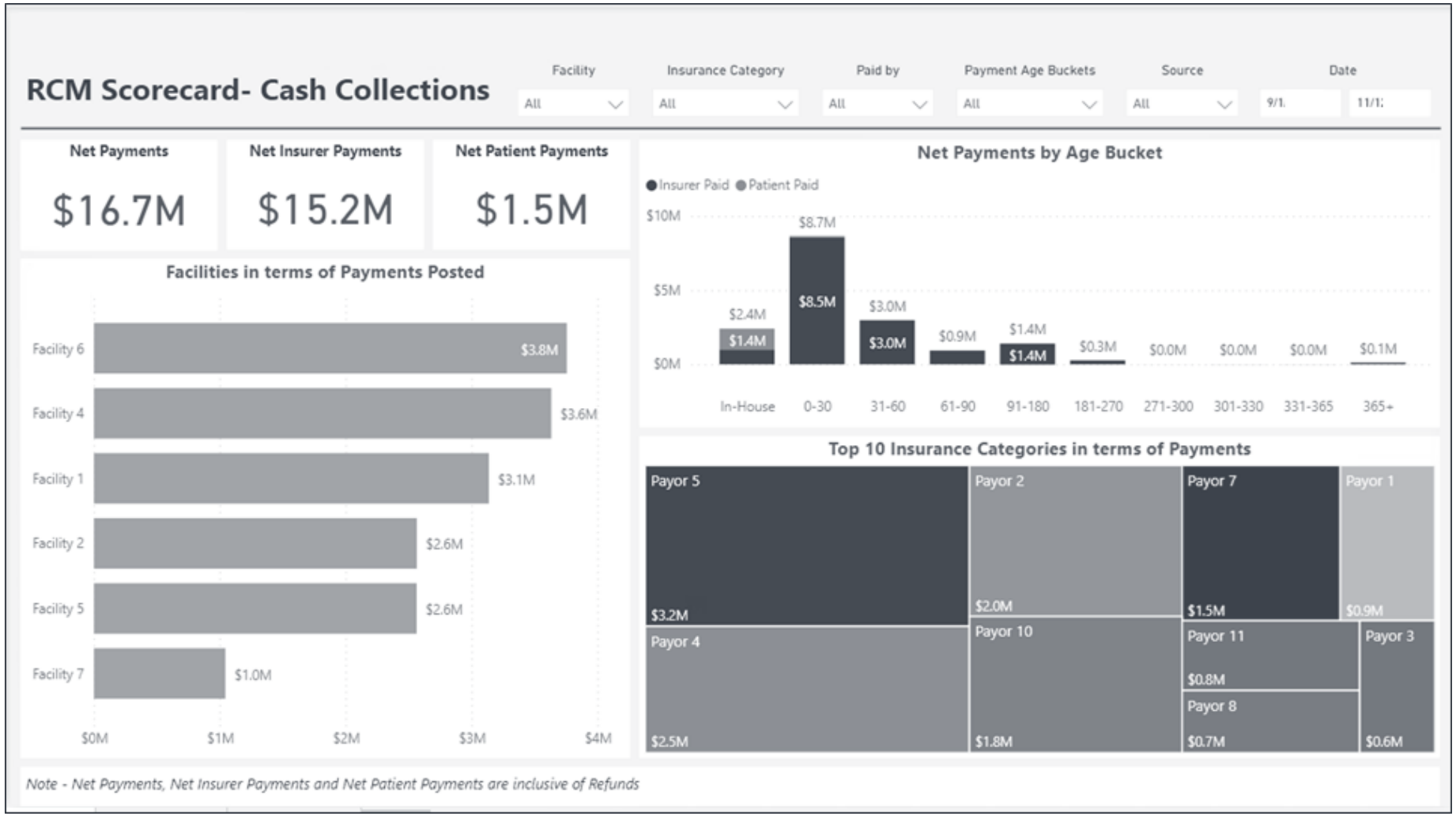
Cash collections

The Cash collection dashboard helps the team to track the distribution of total payments received by facilities, payors segregated by age buckets on a daily cadence. Track the distribution of payments by age to understand whether the payments received are for recent vs older services by payor



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