

Jan 7, 2025 |

## 📅 Daily Check-In: Patient Billing Tickets & Jira Workflow Updates

Attendees: Jennifer Teschendorf Brian Scott Elizabeth Garzon Victoria Deak  
Jasmine Sekhon Breann Perri Richard Forsythe Jordie Booth Solounge Bowen  
Heather Owens Lisa Riffell Meghan Smith Missy Bermea Ronesha Hutton  
Dawn Adams Kelly Balleau Heeba Shamim (c) Carla Cathey Zachary Mchayle (c)  
~~Mia Delaney~~

Attached files: 📎 Billing Helpdesk Triage Playbook

### Notes

- Jira Updates
- 

### Action items

- ☐ Add Enterprise Payment queue-
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Jan 6, 2025 |

## 📅 Daily Check-In: Patient Billing Tickets & Jira Workflow Updates

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Jasmine Sekhon Breann Perri Richard Forsythe Jordie Booth Solounge Bowen  
Heather Owens Lisa Riffell Missy Bermea Ronesha Hutton Kelly Balleau  
Heeba Shamim (c) Carla Cathey Zachary Mchayle (c) ~~Meghan Smith~~ ~~Dawn Adams~~  
~~Mia Delaney~~

Attached files: 📎 Billing Helpdesk Triage Playbook

### Notes

- **Tickets Review**
  - PBHD-1399
- **Escalations**
  - Duplicate tickets coming in review with Carl on import
- **Questions**
  - How to handle the workflow for MCO Benefit tickets?
    - Need to follow up with Carla Cathey on who would be best to handle these ticket types besides
    -

## Action items

- ☐ Create an Patient AZ balance queue
  - ☐
- 

Jan 2, 2025 |

## 📅 Daily Check-In: Patient Billing Tickets & Jira Workflow Updates

Attendees: Jennifer Teschendorf Brian Scott Elizabeth Garzon Victoria Deak  
Jasmine Sekhon Breann Perri Richard Forsythe Jordie Booth Solounge Bowen  
Heather Owens Lisa Riffell Meghan Smith Missy Bermea Ronesha Hutton  
Kelly Balleau Heeba Shamim (c) ~~Dawn Adams~~ ~~Mia Delaney~~

Attached files: 📎 Billing Helpdesk Triage Playbook

## Notes

- **Tickets Review**
- **Escalations**
- **Questions**
  - A/R - for benefit related questions (if patient does not have a benefit policy, they do not bill those to insurance)
    - For patients with an Out of Network insurance, meaning an insurance we are not contracted with, Kindbody's current policy is that we do not file these coverages on behalf of the patients. It's my understanding that this is explained to the patients by the FN(s) but we are receiving tickets asking us to file on the patient's behalf and so want to ensure everyone is aware of current protocol. If the patient has a question about what benefits can/cannot be submitted, this would be answered by the VOB/FN staff.
    - For out of network charges billed as self pay, we are happy to provide a receipt to the patient so that the patient can seek reimbursement through their insurance, independently.
  - 
  - Issue Types with fertility / insurance tickets
    - Will need to further look into proper coverage as what was given to insurance may not always match
  - As of Sept 2024, Millenia no longer has a contract with them to manage info for a patient
    - Will need to let patient know to contact insurance provider directly

- Will need to follow up with Richard Forsythe on how to handle patients w/ this insurance
- 
- **Updates**
  - **Added the specific request for KB Service rendered ticket in portal for correct triaging** (Will require assignee to select correct request type)
    - Invoice Received After Payment
    - Insurance Coverage Not Applied First
    - Incorrect Billing Charges
    - Duplicate Billing Charge
    - Financial Agreement & Cycle Information
    - Other Billing or Invoice Inquiry
  - **Added automation to auto-assign tickets based on Issue and request type**
    - Refunds - Lisa Riffell
    - Unapplied Balance- Meghan Smith
    - Payment Plans - Victoria Deak
    - Invoice/Statement Request - Missy Bermea
  - **Created Teams for each Billing Team in Jira**
    - This feature can automatically send an email to users in the designated group that you are escalating to. (Currently not built out)
    - Allows that manager of the team to view all of their team's tickets
    - Instead of filling in the **Team to be Escalated** field, you'd only fill in **Team** field
    - **Teams Built in Jira**
      - Accounts Receivable (Breann's Team)
      - Medical Billing (Janiyah's Team)
      - Medical Coding (Melissa's Team)
      - Enterprise Medical Billing (Dawn's Team)
      - Enterprise Accounts Receivable (Kelly's Team)
      - Enterprise Pharmacy Billing (Otilia's Team)
      - Enterprise Financial Navigation (Mia's Team)
      - Member Benefit Services (Robert's Team)
      - Pre-cert team (Kendall's Team)
      - RCM Financial Navigator (Allana's team)

#### Action items


- ☐ Work with BI team to pull insurance into the MCO queue
  - ☐ [BI-571](#)
  - ☐ Have Enterprise current process reviewed
-

Dec 31, 2024 |



## Daily Check-In: Patient Billing Tickets & Jira Workflow Updates

Attendees: Breann Perri Elizabeth Garzon Jennifer Teschendorf Richard Forsythe

Solounge Bowen Victoria Deak Ronesha Hutton Kelly Balleau Victoria Deak

Attached files:  Billing Helpdesk Triage Playbook

### Notes

- **Workflow review**
  - **MCO tickets**
    - i. When A/R team handles information, they are then sending the responsibility back to RCM team.
    - ii. RCM team would then respond to patient about their claim status
    - iii. RCM will then close tickets
  -
- **Tickets Review**
  - **KB Service Rendered Issue Types**
    - i. Received Invoice after already paying
    - ii. Charges not made to insurance first
    - iii. Incorrect Charges
    - iv. Duplicate Charge
    - v. Financial Agreement/ Cycle Info
    - vi. Other Invoice/Billing Request
- **Ticket Assignment**
  -
- **Escalations**
  - [PBHD-1119](#)
- **Questions**
  - Based on the ticket reviews, who would be best to triage these specific ticket types within Enterprise?
  - Is there a list documented of all the current Patient's Employers that would be relevant to Employer Benefit?
    - i.  Employer Benefit Master
- **Updates**
  - Updated the Playbook to reflect the current process, please let me know if there are any updates that need to be made
    - i.  Billing Helpdesk Triage Playbook
  - Added screens when “**In Progress**” and “**Escalated**” statues are selected
  - Added Patient Employer field to the KB Service Rendered Queue
  -

### Action items

- ☐ Have Enterprise current process reviewed
- ☒ Document list of employers that would fall under Patient Employer benefit

- ☒ ~~Employer Benefit Master~~
- ☐ Work with BI team to pull insurance into the MCO queue
- ☐ [BI-571](#)
- ☒ ~~Add Patient Acknowledgement into Queues~~
- ☐

Dec 30, 2024 |

## 📅 Daily Check-In: Patient Billing Tickets & Jira Workflow Updates

Attendees: Breann Perri Elizabeth Garzon Jennifer Teschendorf Solounge Bowen

Victoria Deak Kelly Balleau Victoria Deak Lisa Riffell

Attached files: [Billing Helpdesk Triage Playbook](#)

### Notes

- **Tickets Review**
  -
- **Ticket Assignment**
  -
- **Escalations**
  -
- **Questions**
  - **Who manages the AZ related tickets when it's confirmed not Enterprise?**
    - i. Confirmed Lisa Riffell and Victoria Deak work on these ticket types
  - **What does WIN mean for MCO tickets?**
    - i. Confirmed that **WIN** is a specific insurance that should only be assigned to Heather Owens
    - ii. Confirmed all other insurance questions would go to A/R team ( Janiyah Price ) who would then review and re-assign accordingly

### Action items

☐

Dec 27, 2024 |

## 📅 Daily Check-In: Patient Billing Tickets & Jira Workflow Updates

Attendees: Elizabeth Garzon Jasmine Sekhon Solounge Bowen Kelly Balleau

Dawn Adams Ronesha Hutton

Attached files: [Billing Helpdesk Triage Playbook](#)

### Notes

- **Process Review**
  - Any ticket with the invoice **KNY** will always be an Azalea **not** Enterprise

- Confirmed that **all Patient Employer tickets** should be prioritized as **"Highest"** due to their status as White Collar customers.
- **Kelly Balleau**Current Process
  - i. First look in KEMR under Kindbody benefit Tab
  - ii. Check if there is a balance attached with the pt
  - iii. If no employer tag is attached , this would most likely fall under AZ team
- **Ticket Assignment**
  - Schrafts or self pay = Assign to **Ronesha Hutton**
  - Refunds , and Balance Questions = **Kelly Balleau**
  - Employer, Excluding Justworks = **Dawn Adams**
- **Escalations**
  -
- **Questions**
  - Who manages the AZ related tickets when it's confirmed not Enterprise?
  - What does WIN mean for MCO tickets?
  - What does **"Market"** mean within a ticket?
    - i. **Shortened for the Biller of that Kindbody Market/Location**


#### Action items

- ☒ ~~Add Reimbursement Team to the Escalation Team dropdown~~
- ☐ Figure out who manages the Azalea tickets so that we know who to triage the tickets

Dec 18, 2024 |

## Daily Check-In: Patient Billing Tickets & Jira Workflow Updates

Attendees: **Breann Perri** **Brian Scott** **Elizabeth Garzon** **Jasmine Sekhon**  
**Jennifer Teschendorf** **Richard Forsythe** **Solounge Bowen** **Victoria Deak**

Attached files:  **Billing Helpdesk Triage Playbook**

#### Notes

- **Tickets Review**
- **Escalations**
  - Green Light Process Review
    - i. FN is expected to be present within entire process
    - ii. Extremely difficult for RCM team to handle insurance relates issues w/o the assistance of the A/R team
    - iii. Pt should have all information given on the front-end so that they are not aware of everything later on
    - iv. Goal is to streamline process with using one SOP as source of truth
- **Questions**

- Should tickets that have been escalated to a different team and require contacting patients be sent back to the RCM team?
  - i. Need confirmation on the proper workflow for PreCert
  - ii. Confirmed to have this sent over to Heather for dept accountability, RCM should not have to respond back to pt once escalated

Action items



Dec 12, 2024 |

## 📅 Daily Check-In: Patient Billing Tickets & Jira Workflow Updates

Attendees: Breann Perri Brian Scott Elizabeth Garzon Jasmine Sekhon

Jennifer Teschendorf Richard Forsythe Solounge Bowen Victoria Deak

Attached files: 📎 Billing Helpdesk Triage Playbook

Notes

- **Tickets Review**
- **Escalations**
  - Tickets that will need to be updated by EOD
    - i. [Click Here to Open Queue](#)
- **Questions**
  -

Action items

- ☒ Pull a report of “Escalated to Add'l Teams” and add to Dashboard for visibility

Dec 11, 2024 |

## 📅 Daily Check-In: Patient Billing Tickets & Jira Workflow Updates

Attendees: Breann Perri Brian Scott Elizabeth Garzon Jasmine Sekhon

Richard Forsythe Solounge Bowen Victoria Deak ~~Jordie Booth~~

Attached files: 📎 Billing Helpdesk Triage Playbook

Notes

- **Tickets Review**
- **Escalations**
  - Tickets that will need to be updated by EOD
    - i. [PBHD-225](#)
    - ii. [PBHD-123](#)

- iii. [PBHD-129](#)
- iv. [PBHD-135](#)
- v. [PBHD-139](#)
- vi. [PBHD-231](#)
- vii. [PBHD-237](#)
- viii. [PBHD-238](#)
- ix. [PBHD-241](#)
- x. [PBHD-313](#)
- xi. [PBHD-336](#)
- xii. [PBHD-338](#)

- **Questions**

- Triage/Assigning Tickets
  - i. **How to ensure a patient's issue has been resolved?**
    - Need to confirm with MCO team on responsibility for Patient Follow Up & Acknowledgement
  - ii. **Would it be possible to remove Breann's team from the AR group so that they would not have to do the KEMR task AND Jira PBHD tickets?**
    - Confirmed user were instructed to no longer submit KEMR task to avoid and duplicate submissions

Action items

- ☒ ~~Update the Priority of the Imported Ticket to be set to **Medium**~~
- ☒ ~~Kat Team to provide verbiage that should be automated and sent to patient~~

Dec 10, 2024 |

## 📅 Daily Check-In: Patient Billing Tickets & Jira Workflow Updates

Attendees: Breann Perri Brian Scott Elizabeth Garzon Jasmine Sekhon  
 Jennifer Teschendorf Richard Forsythe Solounge Bowen Victoria Deak ~~Jordie Booth~~  
 Attached files: 📎 Billing Helpdesk Triage Playbook

Notes

- **Tickets Review**
  - [PBHD-128](#)
  - <https://kindbody.atlassian.net/jira/servicedesk/projects/PBHD/queues/issue/PBHD-225>
- **Questions**
  - How should we escalate enterprise prescription requests?
    - i. Proceed to **"Cancel"** the ticket along with commenting under the ticket notifying that this will be re-routed to correct team
  - Once responding to the patient for Cancel tickets, should the category be hanged back into the Enterprise?



- i. Yes, proceed to change the category back to Enterprise or correct dept
- Can High Priority task for Accts Receivable be imported into the PBHD portal so that it can avoid the need to escalate tickets?
  - i. Users should NOT be creating task for Acct's Receivable team
  - ii. Be sure to re-iterate the newest process so that we can prevent having multiple sources for the same info
- 

Dec 9, 2024 |

## 📅 Daily Check-In: Patient Billing Tickets & Jira Workflow Updates

Attendees: Breann Perri Brian Scott Elizabeth Garzon Jasmine Sekhon  
Jennifer Teschendorf Richard Forsythe Solounge Bowen Victoria Deak ~~Jordie Booth~~

Attached files: 📎 Billing Helpdesk Triage Playbook

### Notes

- **Home Market Import & Priority Updates**
  - Question: Can we pull in the home market for the patient billing escalations import from the EMR?
  - Priority Update: Can we add a priority field when updating the category to PB Billing Escalations?
    - i. Currently, all tasks imported from the EMR are marked as "High." We need to address this and ensure priorities can be updated manually via the Jira ticket.
- **Help Desk Process**
  - Discuss transitioning to a help desk-style workflow:
    - i. Assign one person each morning to update the issue type and assign tickets.
    - ii. Users will then work on tickets and update priorities as needed.
- **Follow-Up with KAT Team**
  - Confirm progress on the automated message to patients in the EMR.
    - i. Your billing inquiry has been escalated to our dedicated help desk. A member of this team will reach out and respond within 3 business days.
- **Tickets Review**
  -
- **Questions**
  - Should Enterprise AR Team also receive access to help with relocating tickets
- **Escalations**
  - [PBHD-198](#)
  - [PBHD-231](#)
- **Updates**
  - Office/Location field has been added to form and is required for user to enter

- Link to Patient Conversation in KindEMR field has been added to form and is required for user to enter
- Dashboard has been updated to also reflect the Ticket Submissions per Location
- Automation built to automatically fill in **Request type** and **Priority=Highest** fields after bulk imports
- Automation built to automatically fill in **Request Type** after any changes made to the Issue Type
- Created Queues for the top 4 requested issue types (all other issue types will appear in Unassigned and Assign to Me Queues)
- Added MRN field to the queues.
- Added Enterprise/RCM field into Payment Plan and Refund issue types
- 


#### Action items

- ☒ ~~Update the Priority of the Imported Ticket to be set to **Medium**~~
- ☐ Kat Team to provide verbiage that should be automated and sent to patient

Dec 5, 2024 |

### Daily Check-In: Patient Billing Tickets & Jira Workflow Updates

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Attached files:  Billing Helpdesk Triage Playbook

#### Notes

- Tickets Review
  - [PBHD-60](#)- Escalated by Heather Mueller , Vltoria assigned herself to further review ticket
  - [PBHD-52](#)- unsure how to handle the unapplied balance
    - Elizabeth confirmed that if the appointment is considered a non-payment then it would not be transferred to AZ
    - You will have to first un-attach the invoice to the appointment so that it can then be sent over to AZ
- Questions
  -
- Escalations
- Updates
  -

#### Action items

- ☒ ~~Add Location field and Link to Patient Conversation or Chart in KEMRO.~~
- ☒ ~~Add a gadget to the dashboard that tracks the Clinic Location~~
- ☒ ~~Send the list of RCM team for Solounge to add into Jira project~~

Nov 27, 2024 |

## 📅 Daily Check-In: Patient Billing Tickets & Jira Workflow Updates

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Jennifer Teschendorf Richard Forsythe Solounge Bowen Victoria Deak ~~Jordie Booth~~

Attached files: 📎 Billing Helpdesk Triage Playbook

### Notes

- Tickets Review
  - [PBHD-41](#)
    - i. RCM to confirm the the point person to handle refunds so that not all users will have access
  - [PBHD-34](#)
- Questions
- Escalations
- Updates
  - Creating a role restriction within the KEMR so that all users not able to create payment plans for patients

### Action items

- ☒
- ☒

Nov 25, 2024 |

## 📅 Daily Check-In: Patient Billing Tickets & Jira Workflow Updates


Attendees: Breann Perri Brian Scott Elizabeth Garzon Jasmine Sekhon  
Jennifer Teschendorf Richard Forsythe Solounge Bowen Victoria Deak ~~Jordie Booth~~

Attached files: 📎 Billing Helpdesk Triage Playbook

### Notes

- Tickets Review
- Questions
- Escalations
- Updates
  - Add a section within the Ticket that confirmed that the Assignee did contact the patient. Make this a requirement
  -

### Action items

- ☒ Solounge to add a "Responded to Patient checkbox that is Required
- ☒ Update the Issue Types to Better Categorize tickets within Dashboard
- ☒ Update Workflow, to define Triaging workflow
- ☒ Import Tickets from  messages over 10 days old