

[TO-3261] RCM Revamp Workflow for Billing Help Desk

Created: 14/Nov/24 Updated: 16/Mar/25

Status:	TICKET RESOLVED
Project:	Technology Operations Board
Components:	None
Fix versions:	None

Type:	Epic	Priority:	High
Reporter:	Jasmine Sekhon	Assignee:	Solounge Bowen
Resolution:	Unresolved	Votes:	0
Labels:	None		
Remaining Estimate:	0 minutes		
Time Spent:	2 weeks		
Original estimate:	Not Specified		

Attachments:			
Issue links:	<b>Blocks</b>		
	is blocked by	<a href="#">PROD-4746</a> Cal/EMR: Create New Billing Help Desk...	TICKET RESOLVED
	<b>Post-Incident Reviews</b>		
	reviews	<a href="#">TO-3356</a> Jira: Build a Automation to Escalate ...	TICKET RESOLVED
	reviews	<a href="#">TO-3271</a> JIRA service account	TICKET RESOLVED
	<b>Relates</b>		
	relates to	<a href="#">TO-3262</a> Secondary Role Creation: Billing Help...	To Do
	relates to	<a href="#">BI-571</a> Pull Patient's Insurance Provider int...	Done
Vendor / Issue Type:	EMR, Jira/Atlassian, Process Improvement, System Implementation		
Key Performance Indicator:	Completion and accuracy of records, Data Capture Rate, Data Quality & Safety Improvement, Impact on cost of care, Improved Patient Experience, Improved User Experience, Patient Engagement, Reduction of time/workload, Revenue cycle improvements		
KPI Measure:	Integrate billing teams into Jira to handle patient escalations and eliminate backlog. Resolved 44% of 1193 tickets within the first month, aiming for continued improvement in issue resolution efficiency and workflow streamlining.		

<b>Secondary:</b>	Jordie Booth
<b>Epic Name:</b>	RCM Revamp Workflow for Billing Help Desk
<b>Completion date:</b>	16/Mar/25 5:12 PM

## Description

### Background:

- **Objective:** Centralize billing inquiries within the TAS system in the EMR, eliminate reliance on Jira to reduce costs, and create standardized workflows for effective issue resolution.
- **Current State:** Inquiries are currently handled through multiple channels, creating inefficiencies and increasing costs.
- **Immediate Goal:** Integrate all billing inquiries into the TAS system and develop a playbook to guide standardized workflows.

### Next Steps:

#### 1. Phase 1:

1. **Channel Consolidation in EMR Tasks:** Begin transferring all inquiry channels to tasks within the EMR to streamline intake and tracking.
2. **Playbook Development:** Develop a comprehensive playbook detailing workflows for each type of inquiry within the newly consolidated channels.

#### 2. Phase 2: Workflow Standardization:

Standardize workflows for recurring billing issues, implement templates for common requests, and update the workflow for portal messages.

#### 3. Training Implementation

1. Provide training sessions in each phase to ensure team members are proficient in the updated processes.

### Follow Up:

- **Awaiting Confirmation from Robert**
  - Confirm that the CX team has access to create tasks in the EMR to transition their workflow from Jira, which will aid in cost reduction.
  - **Next Step on Confirmation:** If confirmed, fully integrate CX into the EMR task workflow, allowing for Jira discontinuation.
- **Kickoff Call Setup by [Richard Forsythe](#)**
  - Richard will arrange a kickoff call today to initiate the project and align team members.
  - **Resource Preparation:** Richard will compile and share necessary resources with the team.

**References: Primary Channels to Consolidate:** Includes portal messages, in-clinic questions, the 800-number, and emails to [patient.accounts@kindbody.com](mailto:patient.accounts@kindbody.com).

- **Cost-Saving Strategy:** Reduce Jira license costs by consolidating workflows into EMR tasks, linking directly to patient records.
- **Project Phases Overview:**
- **Phase 1:** Immediate channel consolidation into EMR tasks and playbook creation.
- **Phase 2:** Workflow standardization, request templates, and updates for portal message handling.
- **Training:** Training to be provided at every phase.

**Important Links:**

[https://docs.google.com/spreadsheets/d/1C9lZIBaJRmWm53MMJGBFvd2kB\\_SZVyE96dI3VWP8A2o/edit?gid=0#gid=0](https://docs.google.com/spreadsheets/d/1C9lZIBaJRmWm53MMJGBFvd2kB_SZVyE96dI3VWP8A2o/edit?gid=0#gid=0)

<https://kindbody.atlassian.net/servicedesk/customer/portal/51>

## Comments

Comment by [Solounge Bowen](#) [ 12/Dec/24 ]

### Update:

- Support Portal has been successfully built and users are now submitting tickets through the portal

### Portal Updates

- **Office/Location Field:** This field has been added to the form and is now required for all users to complete.
- **Link to Patient Conversation in KindEMR:** A new field has been added to capture the link to patient conversations in KindEMR. This field is also mandatory.
- **Priority Field:** Added to the form to help with ticket prioritization. Instructions for prioritization are as follows:
  - **Highest:** Must be handled today. Critical to operations or significant impact if not resolved immediately.
  - **High:** Expected response within two days. Important, but not critical for same-day resolution.
  - **Medium:** Expected response within five business days. Routine tasks that can be planned for.
  - **Low:** Expected response within ten business days. Minor issues or requests with no urgency.

### Dashboard Updates

- **Ticket Submissions by Location:** The dashboard now includes a pie chart reflecting ticket submissions per office/clinic location.

Comment by [Solounge Bowen](#) [ 12/Dec/24 ]

### Jira Update:

- **Added a Unassigned Highest Priority Queue** - this helps locate tickets that need to be worked on same day and need to be assigned out.  
(Currently there are 8 with the exception of KB Rendered tickets)
- **Updated the Status Workflow**
  - **To Do** - Patient has not been responded to. Work needs attention, and the task is unstated.
  - **In Progress** - Work is actively being done on the task or issue.
  - **Escalated to Additional Team** - The issue has been escalated beyond the current team, and the billing portion is complete.
  - **Waiting for Patient** - Awaiting action or response from the patient.
  - **Resolved** - The issue or task is fully completed and requires no further action.
  - **Canceled** - The issue or task is no longer relevant or has been discontinued.
- **Added an automation for whenever you select to Escalate to add'l team, you'd have to select the desired team before closing out**

Comment by [Solounge Bowen](#) [ 12/Dec/24 ]

### Important Links:

[https://docs.google.com/spreadsheets/d/1C9IZIBaJRmWm53MMJGBFvd2kB\\_SZVyE96dI3VWP8A2o/edit?gid=0#gid=0](https://docs.google.com/spreadsheets/d/1C9IZIBaJRmWm53MMJGBFvd2kB_SZVyE96dI3VWP8A2o/edit?gid=0#gid=0)

<https://kindbody.atlassian.net/servicedesk/customer/portal/51>

Comment by [Solounge Bowen](#) [ 13/Dec/24 ]

### Jira Update:

- Created Automation to automatically set the Office/Clinic Location from the KEMR Home Market. This ensures all locations are accounted for
- Created a new filter for all Escalated to Add'l teams and pulled into PBHD Dashboard

### Example:

### :: PBHD Escalation by Team



Team to Be Assigned Escalation	Count	Percentage
Enterprise	1	<div><div></div></div> 33%
Upper Management	1	<div><div></div></div> 33%
None	1	<div><div></div></div> 33%
Total	3	

🔄 2 minutes ago

Comment by [Solounge Bowen](#) [ 31/Dec/24 ]

#### Updates:

- Updated the Playbook to reflect the current process, please let me know if there are any updates that need to be made
  1. [Billing Helpdesk Triage Playbook](#)
- Added screens when “**In Progress**” and “**Escalated**” statues are selected
  - This will ensure that users are not missing the “**Patient acknowledgment**” during the lifecycle of the ticket
- Added Patient Employer field to the KB Service Rendered Queue
  - This will ensure that the correct team can better categorize the tickets without having to click into each individual ticket
- Created a new field named **Insurance Provider** so that is can be added into the MCO Benefit Service field
- Submitted ticket with BI team to pull the patient’s Insurance data from KEMR into PBHD ticket
  - <https://kindbody.atlassian.net/servicedesk/customer/portal/38/BI-571>

Comment by [Solounge Bowen](#) [ 03/Jan/25 ]

#### Updates:

##### Jira

- **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.
  - 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** → <https://kindbody.atlassian.net/jira/people/search>
    - *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)*

**Reporting** → <https://docs.google.com/spreadsheets/d/1u4vKNhby7XbD4rexB59XOqkpO5aiL22M5bx1syjDVvg/edit?gid=1586450387#gid=1586450387>

- Pulled a report for all PBHD tickets (open & closed) and filtered any duplicate tickets submitted under patients
- Discovered there were over 319 duplicate tickets found within the system

Comment by [Solounge Bowen](#) [ 08/Jan/25 ]

Jira Update:

- Received request from Richard to remove the asterisk for the Link to Patient Chart/Conversation to allow people to leave the field blank and still be able to submit a ticket

## Link to Patient Conversation/Chart \*

Please enter the URL link to the latest conversation with the patient in the

Comment by [Solounge Bowen](#) [ 24/Jan/25 ]

### Update:

- Had meeting with ENT AR team and recieved the feedback that the previous board was easier to understand. Will review RCM-MENT project to document the build of this project.
- I've restored RCM-MENT and retrieved the following build. Being that I have PBHD help desk built, I've documented some categories that will most likely be reviewed and worked on in PBHD.
  - <https://docs.google.com/document/d/16vwfEJZo1vepeRW9npMJu0JZyvdJNjHJQcVjUgR-PO8/edit?tab=t.0>
  - [https://docs.google.com/document/d/1jDPSsCs5BXQ\\_X1g6ke0uDA\\_UKLuM4VsBrO1\\_cZKDvkE/edit?tab=t.0](https://docs.google.com/document/d/1jDPSsCs5BXQ_X1g6ke0uDA_UKLuM4VsBrO1_cZKDvkE/edit?tab=t.0)
- Goal is to make the current PBHD board less complex now that I was able to review previous automations

### Next Steps

- Having a meeting with users from ENT Billing Team to demonstrate Jira and it's workflow

Comment by [Solounge Bowen](#) [ 27/Jan/25 ]

### Update:

- Created <https://kindbody.atlassian.net/wiki/spaces/TechOps/pages/2577137666/Patient+Billing+Help+Desk+Jira+SOP>
- Made major changes with the workflow of the PBHD.
- Made sure that the Helpdesk caters to all Billing team that will be working within there
- Built automations to properly track /categorize tickets according to user selection
- Had a meeting with contractors and Jennifer T. to dicuss the recent changes to poperly triage
- Had a meeting with RCM team to discuss changes to the board
- Had a meeting with Dawn and team member to review the workflow.

- Confirmed will be having a meeting with a AR& Med Billing Enterprise teams after month-end to go over process
  - Patient Billing Helpdesk Jira Review  
Monday, February 10 · 10:00 – 10:30am  
Time zone: America/Chicago  
Google Meet joining info  
Video call link: <https://meet.google.com/hfk-wtnd-cxb>  
Or dial: (US) +1 224-661-0042 PIN: 229 866 979#  
More phone numbers: <https://tel.meet/hfk-wtnd-cxb?pin=4605318248658>

Comment by [Solounge Bowen](#) [ 10/Feb/25 ]

#### Update:

- Had a meeting with ENT AR and Billing team to go over Jira workflow. Meeting was productive and information seemed to be retained
- Recieved request from Jordie to have the following data pulled for PBHD
  - **Tickets closed by day, able to dive a layer deeper and know by person** → [Link to Filter](#)
  - **Number of highest priority added/closed per day** → [Link to Filter](#)
  - **Top pie chart by location** → [Link to Filter](#)
  - Enterprise breakdown by location → [ [Link to Filter](#) | <https://kindbody.atlassian.net/issues/?filter=10789&atlOrigin=eyJpIjoiZjU4YTlkZTI3ZTZiNGRkZThiZWQ0OWNhZTdmMDY1MDYiLCJwIjoiajJ9> ]
  - TTR by ticket type
    - Added adjusted SLA to capture once ticket is created til its has officially closed

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