FSC Portal - Phase 2 Master Summary

Complete Revenue Cycle Management System | October 17, 2025

■ The Core Problem You're Solving

Current Challenge: You're unsure if all therapy sessions are being reimbursed because you work with multiple insurance companies, each with their own billing portal. There's no centralized tracking system to ensure nothing falls through the cracks. **The Gap:** SimplePractice tracks sessions and clinical notes, but doesn't give you a complete view of the revenue cycle from "session completed" to "payment received." **The Goal:** Build a central command center where your team can track every session's journey through the billing lifecycle and catch any that get stuck.

■ The Phase 2 Solution

What You're Building: A complete revenue cycle management system that extends FSC Portal with: • **Status Tracking:** Track each session through 10 lifecycle stages (Completed → Documented → Ready to Bill → Submitted → Pending → Approved → Paid) • **Aging Reports:** See which claims are stuck and how long they've been waiting • **Payment Reconciliation:** Match incoming payments to specific sessions • **Multi-Portal Tracking:** Log which insurance portal has each claim • **Automated Alerts:** Get notified when claims age past thresholds (30, 60, 90 days) • **Revenue Dashboard:** See at-a-glance: What's outstanding? What was collected? Average time to payment?

■ Your Complete Documentation Package

Document	What's Inside	When to Use
1. Provider Metrics Guide	Compensation structure, productivity tracking	When evaluating provider performance
2. Phase 2 Roadmap	8 key features to build, timeline, priorities	Planning and scoping Phase 2
3. Status Workflow	10-stage lifecycle, alert triggers, roles	Training staff, defining process
4. Database Schema	Complete SQL scripts for Supabase	Technical implementation
5. UI Mockup Specs	7 new pages with detailed wireframes	Design and development reference
6. Implementation Checklist	Week-by-week tasks, testing, dependencies	Project management
7. Master Summary (this)	Overview of entire Phase 2 project	Executive summary

■ The 7 Core Metrics That Matter

Metric	Target	Why It Matters
Unbilled Sessions	<10	Revenue leakage if too high
Outstanding Claims ($)	Track vs goal	Cash flow indicator

Avg Days to Payment	<45 days	Efficiency measure
Aging >90 Days	0 claims	Critical follow-up needed
Denial Rate	<5%	Quality indicator
This Month Collections	Track vs budget	Revenue recognition
Claims per Staff	Workload balance	Resource planning

■■ Timeline & Effort

Total Duration: 8 weeks (full-time developer) **Week 1-2:** Database foundation (SQL schema, triggers, views) **Week 3-4:** Core UI components and revenue dashboard **Week 5-6:** Payment entry, claim tracker, session details **Week 7-8:** Work queue, alerts, polish, testing **Estimated Effort:** 200-250 developer hours **Quick Wins (Week 1):** Just adding billing_status tracking gives immediate value

■ How Your Weekly Process Will Change

Before Phase 2	After Phase 2
Upload CSV to portal	Upload CSV to portal ✓ (same)
Hope sessions get billed	See "Ready to Bill" queue
Check multiple insurance portals	Log submissions in one place
Guess what's been paid	Match payments to sessions
Wonder about aging claims	Auto-alerts for 30+ day claims
No visibility into bottlenecks	Dashboard shows where things are stuck
Reactive problem solving	Proactive issue prevention

■ Expected Return on Investment

Time Savings: • Reduce manual portal checking: 5 hours/week → 1 hour/week (80% reduction) • Faster payment reconciliation: 3 hours/week → 30 minutes/week • Automated alerts eliminate manual tracking: 2 hours/week saved **Revenue Protection:** • Catch forgotten claims before they age out (typically 2-3% of revenue) • Reduce denials through better documentation tracking (1-2% improvement) • Faster follow-up = faster payment = better cash flow **Break-Even:** If this prevents losing even $10,000/year in forgotten claims, it pays for itself in year 1. **Scalability:** Currently managing ~150 sessions/month. This system scales to 500+ without adding staff.

■ Your Next Steps

Priority	Action	Document to Reference

1	Review all documents in this package	All PDFs
2	Run database SQL scripts in Supabase	Database Schema Guide
3	Fix duplicate entries in your CSV	Provider Metrics Guide
4	Start with Week 1 tasks	Implementation Checklist
5	Build status tracking components	UI Mockup Specs
6	Train staff on new workflow	Status Workflow Guide
7	Launch and iterate	Phase 2 Roadmap

Questions? Refer to the specific document for detailed implementation guidance. All SQL, UI specs, and workflows are ready to go!