Automating Workflows in Practice Management

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Executive Summary

This presentation will help you:

- **Understand** how Athena is investing in CPS PM over the next 12 months

- **Learn** how automation can impact your practice

- **Influence** how the CPS R&D team builds automation tools

Key Issues

- Highly repeatable tasks are manually executed in CPS PM today

- Human error in executing manual processes can leave money on the table

Key outcomes impacted

Automating simple tasks in practice management should create a more **efficient** administrative team, **reduce** errors caused by manual processes, and lead to **higher collection rates**.

Agenda

- **Discuss overall CPS PM Product Priorities**
  - o Increasing our value to customers
  - o Why tools for automating workflows is a priority
- **Understand where automation is possible**
  - o Areas that could be automated
  - o Why we're prioritizing what we are
- **What will it look like?**
  - o What we do today
  - o How it can work tomorrow
- **How will we roll automation out to customers**
  - o What the team is working on right now
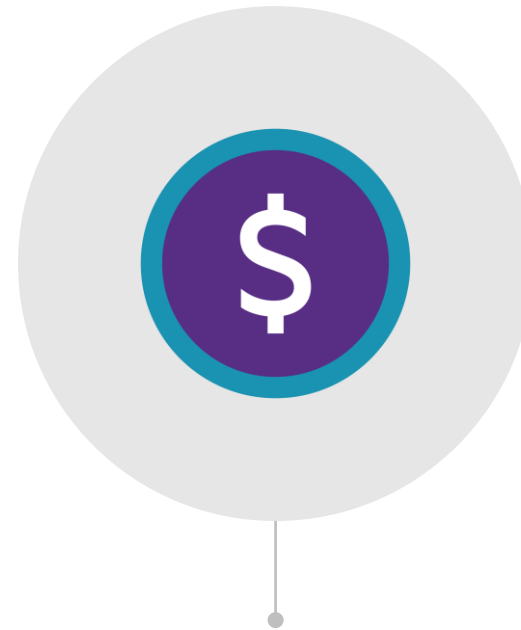 - o Goals for releasing the tool over time

"Creating Additional Value with Practice Management"

CPS Practice Management will focus on providing value across three key areas over the coming months
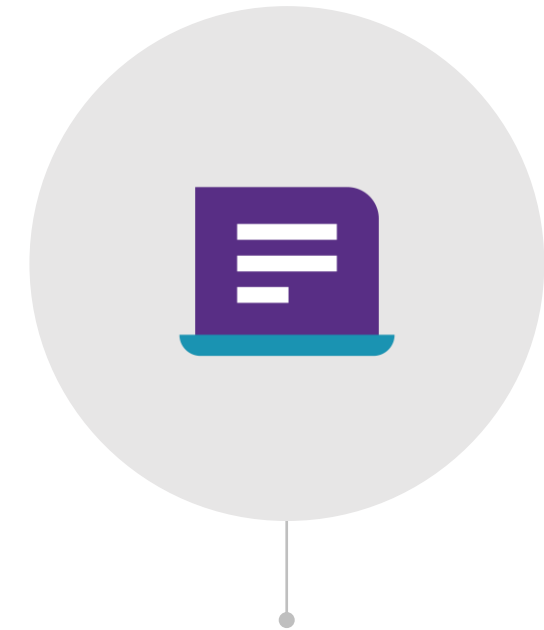
Practice Efficiency

Reduce time spent executing workflows that are highly repeatable.
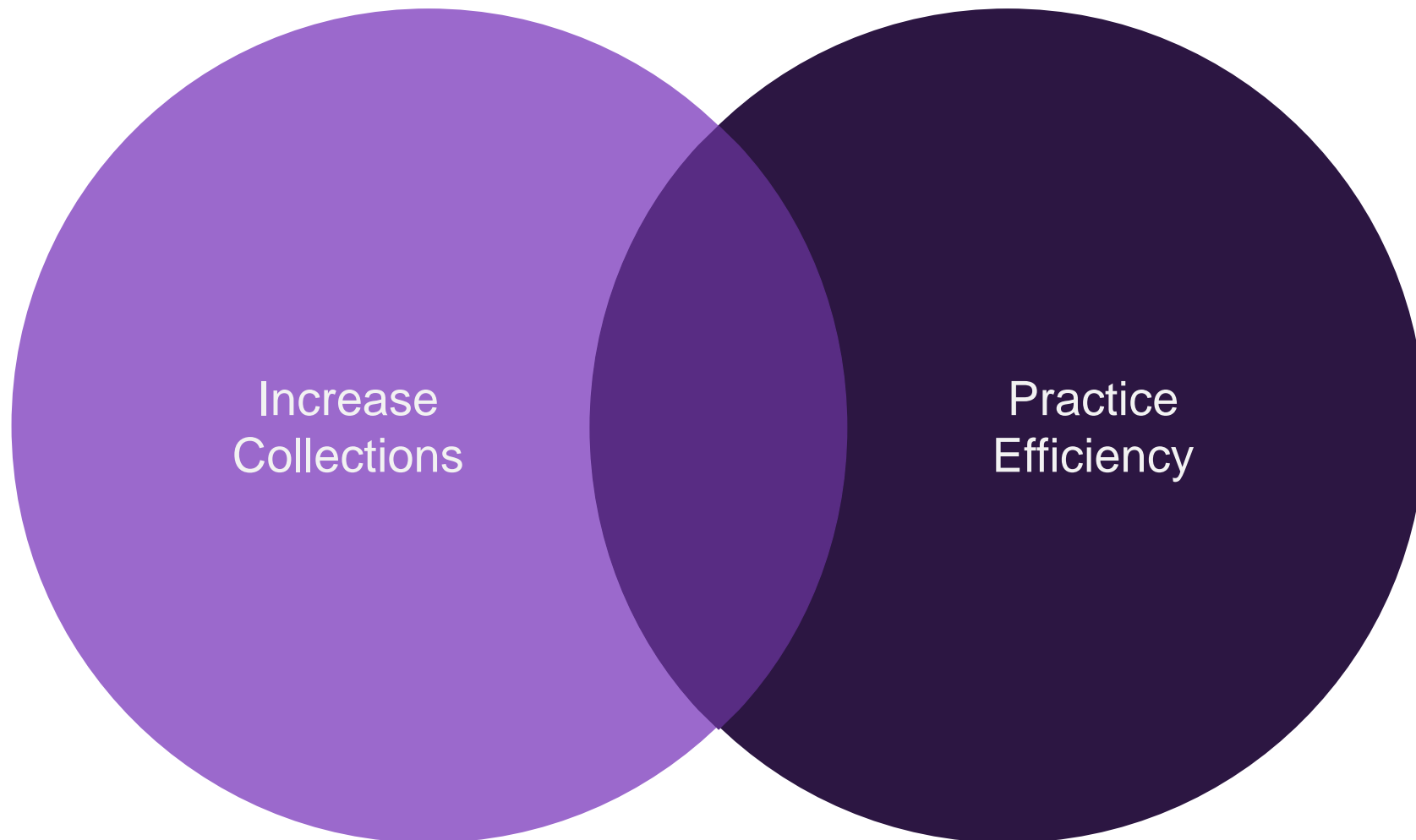
Increasing Collections

Create features that increase collection rates and data accuracy.

Product Quality & Security

Addressing CPS PM's stability, performance, and security.

Automation provides an opportunity to both create more efficiency and increase collections

Increase Collections

Practice Efficiency

Increase Collection Rate:
Create a tool that automatically pushes out patient statements that meet your most frequently used criteria

Address Exceptions, Not Processes:
Automatically send 100% of statements that don't require review prior to sending

Decrease Manual Effort:
Decrease time spent creating statement runs by over 75%

Considering the Options

What areas are ripe for automation within the practice management tools?

Lower volume & frequency:
Patient Statements

Similar volume, increased frequency:
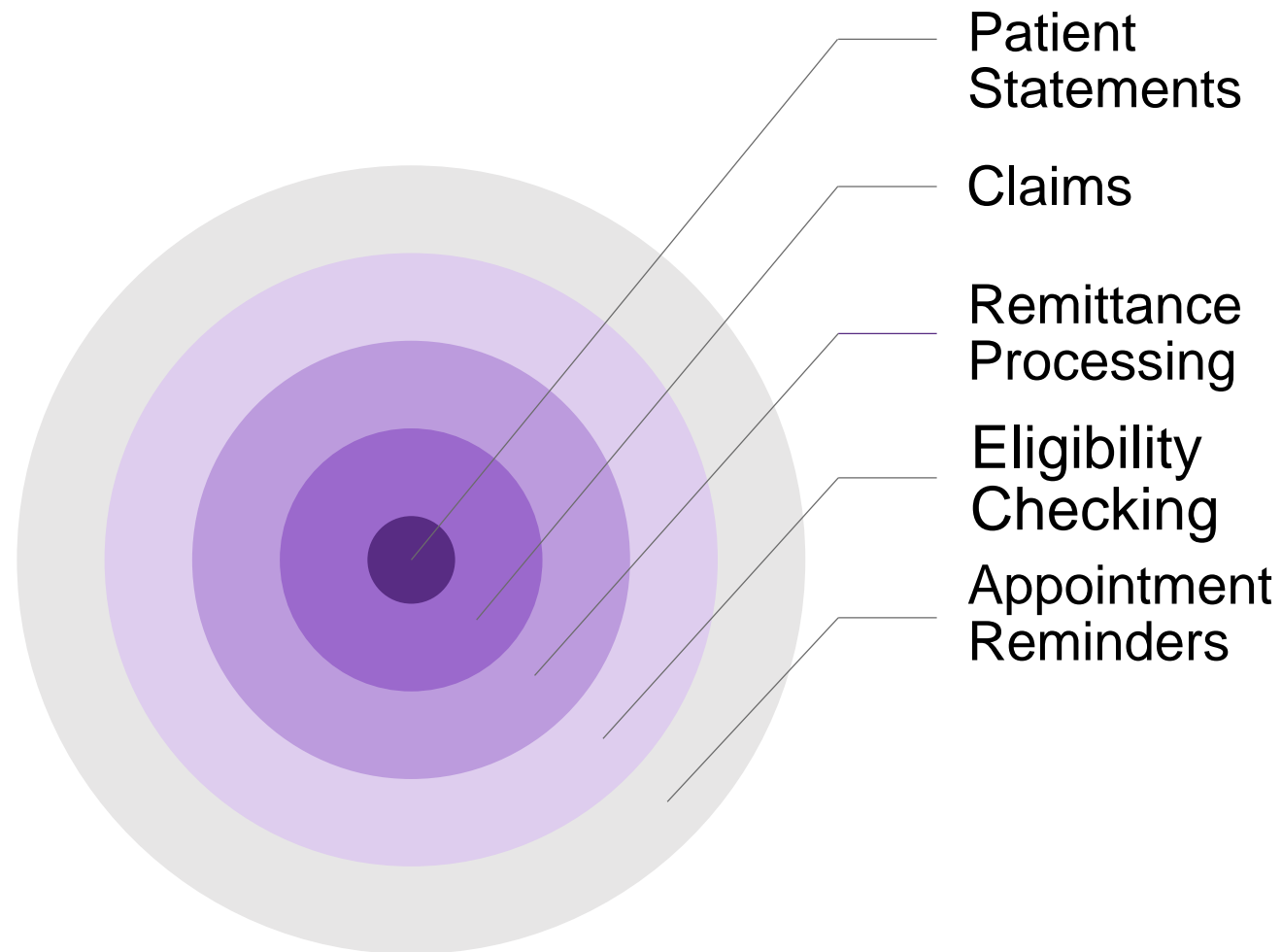Claims and Remittance

Higher volume and frequency:
Eligibility Checking
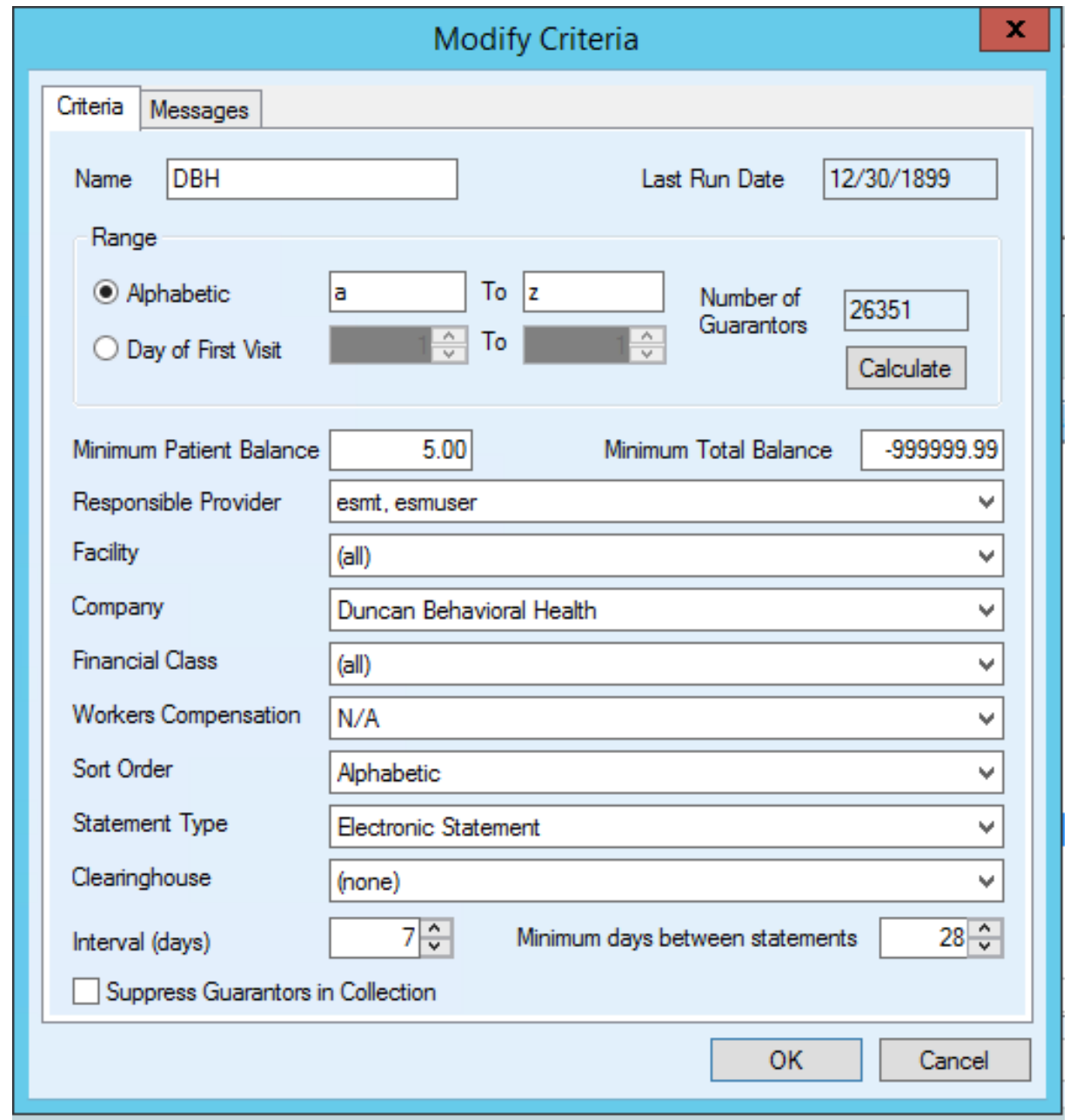
Highest Volume and frequency:
Appointment Reminders

Statements is the initial priority, but additional areas will be looked at for automating in the future

Patient Statements

Claims

Remittance Processing

Eligibility Checking

Appointment Reminders

How often does the process run?

How much data is analyzed?

What creates the most risk?

What workflows take the most time?

What impacts payments the most?

Process & Criteria

Today's Statement Creation Process

- Every data element is discrete

- Options are the same for everyone

- Allows balances to age until someone can get to it

2 **Scheduling That Criteria To Run On Its Own**

- Simple criteria run on schedule:

  - *Patient balances over 7 days old*

  - *Patient balances under 37 days old*

  - *Patient balances over $10*

  - *Define the destination you already use*

  - *Define the frequency on which you want this to run (daily, weekly, monthly)*

- Schedule the follow-up:

  - *Patient balances over 37 days old*

  - *Patient balances under 67 days old*

  - *Patient balances over $10*

  - *Same destination*

  - *Same frequency*

3 Route Exceptions to Tasks Queues

- ## Don't let balances fall through the cracks:

  - *Accounts on hold*

  - *Accounts with small balances*

  - *Accounts that failed the process*

  - *Rejections from the statement vendor*

Working Through Delivery

At a minimum, the V20 release is planned to include a beta release of the batch job scheduling process

Today

Batch job scheduler
Process in the background to allow events to be scheduled for a "run."

December

Statement POC
Ensure statements can be sent automatically to a sample enpoint

January - February

Statement Beta
Ensure initial customers can run batch jobs in their environment without system performance disruptions and instability.

February - March

Quality
Build tools to ensure that statement processes are not disrupted by the release of the batch job feature.

V21

Beta release
Allow customers to test the process and create initial statement batch jobs.

Considerations for becoming a beta customer of batch processing

1   It won't be perfect

2   Confirm or deny the value to your business

3   You'll save time before anyone else!

Call To Action: Consider Working With Us

1 Join the customer feedback group for this feature by emailing rbrickl@athenahealth.com

2 Consider being an early adopter for each area to be automated

3 Read our emails so you don't miss out on webinars and training sessions

Q&A

Thank you

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