DISCUSSION GUIDE

Bill the Correct Payer and Optimal Amount

Financial Management Change Package: Best Practice 1

FPNTC FAMILY PLANNING NATIONAL TRAINING CENTER

How to Use This Guide	This guide is designed to support facilitation of an interactive learning session about the first best practice, **Bill the Correct Payer and Optimal Amount**, in the Financial Management Change Package, whose purpose is to drive improvement on the financial management performance indicators. Facilitators should feel free to adapt and revise this guide. Facilitators may choose to: » Convene staff from one or more clinics for a standing meeting (e.g., monthly) to discuss each Best Practice (in order or as needed) from the Financial Management Change Package. *(See other Best Practice discussion guides.)* » Convene a one-time meeting with clinic staff about this topic.
Learning Objectives	By the end of the discussion, participants should be able to: » **Describe the importance of billing the correct payer and optimal amount** » **Describe challenges related to billing the correct payer and optimal amount** » **Describe at least one strategy to bill the correct payer and optimal amount** » **Describe one tool available to support front-end practices**
Length	At least **60 minutes**, with more time for discussion as schedules allow. Example discussion questions are provided; facilitators can use them based on participant interest.
Materials	» **Financial Management Change Package:** Summary of evidence-based recommendations for improving financial management practices and the factors that impact financial health, strategies, case studies, tools and resources » **Performance Report and Improvement Plan:** Spreadsheet where Title X sites (or agencies) can document performance indicator data on a monthly basis, document improvement plan(s), and home in on specific performance indicators as part of a quality improvement initiative » **PowerPoint Slides with Notes:** Slides with speaker notes and discussion questions
Format	Discussions can be facilitated **virtually or in person.**
Suggested Participants	**Staff from one or more family planning clinics.** Involving multiple sites can facilitate peer-to-peer sharing. Having representation of clinical, administrative, billing/financial staff, and front desk/registration can help address system issues.
Before You Start...	Participants should **update and refer to their data in the Performance Report and Improvement Plan** prior to the session and bring the completed data to the meeting. If a site is unable to extract data, recommend to document that as well.

Bill the Correct Payer and Optimal Amount: Topic and Objectives

5 minutes | Slides 1-4

	Present Slide	Facilitate
1	Bill the Correct Payer and Optimal Amount: Financial Management Change Package Best Practice 1	Activity: » Conduct participant and facilitator introductions.
2	Financial Management Change Package: best practice recommendations	
3	Financial Management Change Package: Best Practice 1	
4	Meeting objectives	

Rationale, Impact, and Performance Indicators

15 minutes | Slides 5-9

	Present Slide	Facilitate
5	Rationale for billing the correct payer and optimal amount	
6	Suggested performance indicators to bill the correct payer and optimal amount	
7	Suggested performance indicators to bill the correct payer and optimal amount (cont.)	
8	Payer mix impact	Discussion: » In looking at this table, what jumps out at you?

9	Accurate family size and income impact	Discussion: » In looking at this table, what jumps out at you? • Be mindful that this example has one assumption—the full charge for a service is $100. » In this example, if you were collecting 95% of the charges (which is a best practice), what would the difference in your annual revenue be? • *Note to facilitators: Give participants a minute to calculate scenario, $2,450 x 12 x .95 = $27,930 increase in revenue!*

Challenges

5 minutes | Slides 10-11

	Present Slide	Facilitate
10	Discussion of challenges	Discussion: » What are your agency's challenges related to billing the correct payer and optimal amount?
11	Discussion of challenges (cont.)	

Strategies for Policies and Procedures

10 minutes | Slides 12-19

	Present Slide	Facilitate
12	Overview of strategies for Best Practice 1	
13	Strategies for policies and procedures	
14	Charging TPP and confidential services	

15	Importance/value of a cost analysis	
16	Using cost analysis data	
17	Fee schedule example	Discussion: » In looking at this table, what jumps out at you?
18	Using cost analysis data	
19	Cost analysis tool	

Strategies for Front-End Procedures

5 minutes | Slide 20

	Present Slide	Facilitate
20	Strategies for front-end procedures	

Strategies for Providing Training

5 minutes | Slides 21-23

	Present Slide	Facilitate
21	Strategies for providing training	Discussion: » How often are your agency's policies reviewed/updated? » When and how are new staff trained on the policies? » When and how are staff notified of changes to the policies? Are there opportunities for staff to discuss these changes? » Is there a mechanism in place for staff to provide feedback on the policies and procedures? If there are barriers or challenges related to implementing a policy or procedure, how is management informed?
22	Coding tools	
23	Case scenario	Discussion: » What is a small change you can make, and how can you measure improvement?

Success Story

5 minutes | Slides 24-25

	Present Slide	Facilitate
24	Success story	
25	Success story (cont.)	Discussion (if time allows): » What actions jump out at you? » What actions could you take at your site (or agency)?

Conclusion

5 minutes | Slides 26-27

	Present Slide	Facilitate
26	What other questions do you have? What other issues would you like to discuss?	Discussion (if time allows): » What other questions do you have for each other before we end? Are there other issues or challenges that we haven't discussed yet? *(Note to facilitators: If challenges came up in earlier discussions, this could be a good time to discuss them.)* » Before we leave, what is one thing you will take away from today's discussion? *(Note to facilitators: Consider round robin sharing or ask a couple of participants to share.)*
27	Thank you	