DISCUSSION GUIDE

Monitor and Manage Payments from Third-Party Payers

Financial Management Change Package: Best Practice 3

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How to Use This Guide	This guide is designed to support facilitation of an interactive learning session about the first best practice, **Monitor and Manage Payments from Third-Party Payers**, 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 monitoring and managing payments from third-party payers** » **Describe challenges related to monitoring and managing payments from third-party payers** » **Describe at least one strategy to monitoring and managing payments from third-party payers** » **Describe one tool available to manage collections**
Length	At least **90 minutes**, with more time for discussion as schedules allow. If this time frame is not possible, it is recommended that facilitators break up this content into two sessions. Sample 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.

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Monitor and Manage Payments from Third-Party Payers: Topic and Objectives

5 minutes | Slides 1-4

	Present Slide	Facilitate
1	Monitor and Manage Payments from Third-Party Payers (TPPs): Financial Management Change Package Best Practice 3	Activity: » Conduct participant and facilitator introductions.
2	Financial Management Change Package: best practice recommendations	
3	Financial Management Change Package: Best Practice 3	
4	Meeting objectives	

Rationale, Performance Indicators, and Impact

10 minutes | Slides 5-8

	Present Slide	Facilitate
5	Rationale for monitoring and managing payments from TPPs	
6	Suggested performance indicators to monitor and manage payments from third-party payers	
7	Suggested performance indicators to monitor and manage payments from third-party payers (cont.)	
8	Example of impact	

Challenges

5 minutes | Slides 9-10

Present Slide		Facilitate
9	Discussion of challenges	Discussion: » What are your agency's challenges related to monitoring and managing payments from third-party payers?
10	Discussion of challenges (cont.)	

Strategies for Policies and Procedures

10 minutes | Slides 11-13

Present Slide		Facilitate
11	Overview of strategies for Best Practice 3	
12	Strategies for developing policies and procedures	Discussion: » Do your site's (or agency's) policies and procedures address these items in detail? • If you had a new staff member, would that staff member be able to do the job (or perform a task) based on your agency's policies and procedures? » What policies (or aspects of policies) are unclear regarding these items mentioned? » If they are clear to staff, are they always clear to clients?
13	Strategies for developing policies and procedures (cont.)	Discussion: » Do your site's (or agency's) policies and procedures address these items in detail? • If you had a new staff member, would that staff member be able to do their job (or perform a task) based on your agency's policies and procedures? » What policies (or aspects of policies) are unclear regarding these items mentioned? » If they are clear to staff, are they always clear to clients?

Strategies for A/R Management

15 minutes | Slides 14-21

	Present Slide	Facilitate
14	Strategies for A/R management	
15	A/R management reports	
16	A/R aging report	
17	A/R aging report (cont.)	
18	Reviewing A/R aging report	
19	Sample A/R aging report	Discussion: » Review the sample A/R aging report. What stands out to you? » What trends do you notice in the grand totals in A/R from August to November? » What trends do you notice in specific A/R buckets? » What does your agency typically do with A/R from private insurance that is over 365 days (or one year)? » Now look at the Medicaid rows in November and October. What jumps out at you?
20	Claims receivable report	
21	Sample claims receivable report	Discussion: » Take a few minutes to review the sample claims receivable report for July 1, 2017 through July 31, 2017. » What stands out to you? » What happened for the claims associated with clients 1, 3, 5, and 6? • What are possible solutions for resolving late billing? » What high dollar amounts are unpaid? • What actions could you take to address client 7's unpaid claim? » Review the multiple $72 charges. What jumps out at you regarding these claims? • What actions could you take?

Strategies for Denial Management

15 minutes | Slides 22-27

	Present Slide	Facilitate
22	Strategies for denial management	Discussion: » What denial management processes does your site (or agency) have in place?
23	Avoid denials	
24	Avoid denials (cont.)	Discussion: » What common denial reasons has your site (or agency) received for denied claims from third-party payers?
25	Analyze denial rates on a monthly basis	
26	Utilize reports to analyze denials	
27	Resolve unpaid or denied claims	

Strategies for Managing TPP Contract Relationships

10 minutes | Slides 28-32

	Present Slide	Facilitate
28	Strategies for managing TPP contract relationships	Discussion: » How does your site (or agency) manage relationships with third-party payers? » What processes on this list does your site (or agency) utilize in its relationships with third-party payers? » How does your site (or agency) address issues with third-party payers?
29	Maintaining relationships with TPPs	Discussion: » Why is maintaining relationships with third-party payers important to your agency?

30	Communication tips
31	Ongoing monitoring of TPP contract terms
32	Contractual obligations tracking

Success Story

10 minutes | Slides 35-36

	Present Slide	Facilitate
33	Success story	
34	Success story (cont.)	Discussion (if time allows): » What is one thing you learned from this success story? » What is one thing from this success story you could implement in your setting?

Conclusion

5 minutes | Slides 37-38

	Present Slide	Facilitate
35	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.)*
36	Thank you	