



McBee reduces outstanding F2F orders by 95% by optimizing workflows and technology; recovers \$836K in unbilled revenue

CLIENT PROFILE

Nonprofit home health, palliative, and hospice provider in the Northeast region.

\$836K +
of unbilled
revenue recovered

95%
decrease in
unbilled revenue
related to F2F

Challenge

Like many healthcare organizations nationwide, this home health agency found themselves experiencing the impacts of widespread healthcare workforce challenges. These workforce challenges, including staff shortages, not only threaten the quality of patient care but can increase administrative burdens and put operational efficiency at risk. Barriers in communication increased between internal teams and administrative tasks were left outstanding. For example, more than 529 face-to-face (F2F) orders were left incomplete – a primary contributor to the agency's \$2.4M in unbilled revenue. McBee stepped in as a trusted partner and extension of their team to lighten their workload, relieve administrative backlogs, and implement sustainable solutions that reshaped their orders management process.

Solution

EMR and Documentation Tracking System Optimization

McBee began this partnership by completing an in-depth analysis of the agency's current EMR and document tracking systems to ensure the two systems were properly integrated for a seamless workflow. By looking into both the EMR system and document management system, we identified opportunities for optimization to better track the status of outstanding documentation moving forward. Key recommendations included:

- Updating the payer source in the EMR system to ensure the correct F2F requirements are completed for specific payors to prioritize timely resolution of any issues that might hold billing.
- Eliminating outdated and duplicated documents, as well as adding new features and webinar training to the document tracking system to increase team productivity.

In addition, an automated faxing feature, recommended by McBee, now faxes outstanding documents from the document management system on a seven-day cycle to ensure continuous communication with physician offices.

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Orders Management Process Optimization

McBee prioritized unbilled revenue and strategized to maximize efficiency within the agency. Our team emphasized the importance of document management by providing weekly reports, including relevant information regarding outstanding documentation to ensure progress toward goals. The team identified tasks and prioritized them by physicians with high referral volumes and by payor source. McBee then identified how many orders were pending review and needed to be processed compliantly into the patient's chart in the EMR.

To ensure the success of the agency post partnership, education and training provided by McBee experts was key. McBee trained staff on how to run reports from the new and improved EMR system so they could properly identify areas to prioritize on their own. Additionally, McBee suggested process improvements that enhanced communication between cross-functional teams to keep billing compliance top of mind.

Results

At the start of the engagement there were over 200 documents daily awaiting review. By the end, there were less than 20 a day due to the increased speed of completing documentation and pushing claims out the door for reimbursement.

Through robust data and prioritizing document management tasks, McBee was able to assist in decreasing the agency's outstanding documentation significantly. F2Fs were decreased from 529 to 27 by correcting the payor source setup to identifying which F2F's were truly needed and contacting physicians for the required documentation McBee completed over 2,000 orders over the course of the engagement allowing for unbilled revenue due to documentation to decrease from \$2.1M to \$1.6M in just four months. According to the agency's Chief Financial Officer, their cash collections were the highest they have been in over a year, which can be attributed to the \$836k decrease in unbilled revenue.

McBee is committed to eliminating the burden of administrative tasks for current and future clients through robust expertise, education, and technology. In addition to enhancing financial outcomes, our experts equip your organization with the tools and resources to provide the complete healthcare experience for the communities and patients you serve. Get more information on our [unbilled revenue mitigation](#) services and an expert will be in touch. We look forward to connecting with you.

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