Best Practices for Implementation

Implementation Best Practices

During decision making process invite key staff members from cross functional departments to bring questions and attend the product demo’s.

Readiness Checklist

- **Implementation Strategy:**
  - Pilot--Trialing the Rethink platform to determine if it is a fit for your organization
    - Test the system with a purposeful selection of learners, staff, locations
  - Full Implementation--Adopting the Rethink platform into your organization
- Identify key outcomes that will define what a successful implementation looks like
  - Be prepared to share any unique scenarios with your organization that may impact implementation
  - Create a matrix of staff by job title and job responsibilities to aide in the creation of roles and permission with Rethink
    - For example: RBT, Lead RBT, Student Analyst, BCBA, Senior BCBA, etc.
  - Create a plan to communicate to your staff about the transition to using Rethink and get buy in
  - Plan for stopping existing system: Overlap? Hard Stop Date?
- Set realistic timelines to roll out the new software
  - Utilize the provided Rethink Implementation Plans to track agreed upon benchmarks
  - Adopt a “train the trainer” model
  - Create internal training plans for new staff
- Identify Internal Implementation Team Members
  - Implementation team members should have knowledge across departmental areas: Finance/Payroll, Compliance, HR, Clinical, billing.
  - Based on size of organization assign a Project Manager to oversee the implementation of multiple products or identify internal content area experts that will field all staff questions and reach out to communicate with Rethink’s Implementation Specialists.
- Identify Rethink Team Members
  - Create a cheat sheet of the Rethink team members' contact information to guide you in reaching out for assistance
- Review the Rethink technical specification requirements prior to purchasing new devices
  - Identify if you will be purchasing devices for staff and if so what type

Clinical Specific Implementation Best Practices	PM Specific Implementation Best Practices	Self Billing (Kareo) Specific Implementation Best Practices

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• Identify if staff will be entering programs in addition to their normal job responsibilities or if they will be given additional time, if so how much? ◦ Entering client programming takes, on average 2-4 hours/client. • Create a plan for stopping previous data collection system. Will this be a hard stop date? How will data be saved and pulled for sequential authorization and data analysis? • Have information from Funders on what is required in a Treatment Plan to be able to build and customize your report templates. • Have content area experts regularly solicit questions from staff regarding clinical features. ◦ Have content area expert guide staff to Rethink’s Self-Help Center ◦ If questions cannot be answered by content area expert or Self-Help Center, content area expert(s) reach out to Clinical Implementation Specialist.	**Designate a System Administrator that will become the company’s Rethink Expert** 1. Identify key members of your company’s implementation team that have knowledge and can make decisions on set up components specific to: • Funder Contract Requirements which include Session note requirements • Funder Billing Codes, Rates • Client Policy and Authorization Data • Billing Reporting Needs • Payroll Reporting Needs • Scheduling Specific Set Up Needs such as Role and Permissions as well as other settings that will be geared toward your business operational needs 1. Rethink’s Practice Management Implementation process includes a 90 minute Kick Off call with weekly 60 minute check-ins until the customer is up and running. (Rethink uses Zoom for all customer meetings)	Ensure familiarity with contracts and basic billing knowledge before SB kick off. SB training is on system set up/use of system and does not include any practical billing training.

- All Key implementation Team Members should plan to attend the Initial Kick Off Call where the Rethink Implementation Specialist will review all areas of the system that will need to be set up in order to schedule.
- The Kick Off call is the time to identify what, how and when the required information will get completed.

1. Depending on the company size and vision for the implementation, it can take between 45-120 days for users to be up and running.

1. For providers who have large quantity of data, Rethink can provide *excel templates for the following areas (Funder Billing Codes and Rates, Staff Pay Codes, Staff License and Credentials, Client Policy Data, Client Authorization Data, Client Diagnosis)

proficiency using in excel is needed.

1. The Provider's Implementation team members should plan to block time and resources until the system is set up and ready for use. (Time can vary depending on how much data the customer has and if they will be manually entering or using Rethink's excel templates).

1. Identify billing/funder set up 'expert' who knows:

- Your service Lines/specialty of services needed for reporting
- Your billing codes, rates & funder billing rules

1. Identify Staff HR/payroll 'expert' who knows:

- Your desired pay codes & needs for payroll reporting
- Company and staff credentials for both tracking & billing requirements

1. Identify client set up 'expert' who knows:

- client general demographic information, availability, client policy information, diagnosis, and authorization needs.

1. Training

Training needs will be reviewed during the Implementation Process and will be based on the size and needs of each customer.

On Demand Resources are available for the Scheduling Tool for all levels of staff including Admin Schedulers, front line staff as well as supervisors.

**All team members will need to be able to log into Zoom calls, have adequate microphone & speaker for these calls, and be able to share their screen, if needed.

- Identify who will have access to Kareo
- Identify who will be the internal expert to address Adjustments, Rejections and/or Denials
- Understand Code Requirements for each unique Funder
    - If Provider uses custom codes (other than 9715x), then provider should know all funder requirements for codes
        - NOS/NOC code requirements
    - Understand Rounding Rules and combining charge rules for claims submission
    - Understand Authorization Set up in regards to claim submission
    - Understand funder requirements for claims submission.
- Be familiar with the payor IDs, NPIs and Taxonomy codes and where to locate this information.
- Identify a content area export with knowledge of ERAs, 835 files how to enroll for EFT with funders
- Have a plan for billing for Contract Rate vs Standard Fee rate and understand the implications of both
- Identify a content area export with knowledge of basic billing procedures such as
    - Approving & submitting claims,
    - Managing Denials/Rejections,
    - Sending patient statements
- Create a plan for starting billing through Kareo and managing balance forwarding
- Identify any unique billing needs:
    - Are any other systems used for loading claims/ERA/Patient statements?
    - Is there a need for invoices?
    - Is there a need to bill for Late fees/No Show/Cancellations?
    - Is there a Hardship Program and a need for custom adjustments?
    - Is there an existing or prior Kareo log in for your company?
    - Is there an internal company biller/billing team or is an external billing company being used? If an external company, do they have an existing Kareo account and what permissions will they need in the system?