# COURSE CATALOG

STONEVENTURES
YOUR SOURCE FOR SUCCESS
APRIL 2013

WWW.STONEVENTURES.ORG

# About The Course Offerings & Venue

## VENUE

Many courses listed are available for dedicated/private programs with customizations for individual business entities in various market sectors. Many of the courses can also be presented in a public setting with multiple market sectors represented.

## COURSE TYPE LEGEND

**Public Presentations** are courses that may be presented in an expo, association, or local group format. In these sessions no confidential or case specific data will be used or integrated into sessions, although in some courses participants may present scenarios without protected health information for discussion purposes.

**Dedicated Presentations** and **Workshops** are courses that are only offered under a contract with individual business entities. In general, workshops are dedicated and include review of company proprietary information and data that requires confidentiality and in most cases Non-Disclosure and/or HIPAA Business Associate Agreements.

## Your Host and Dedicated Specialist

Ed Stone, a 30-year veteran of the healthcare industry has specialized in all things operational with a focus on reimbursement. From small start-up new products and services to large mature home health providers, diagnostics, medical devices, hi-tech services and medical offices, Ed has provided guidance and leadership in both executive management and in consultative roles. Ed's community leadership was focused on public safety and emergency management, which upon his development provided a number of program adaptations to healthcare. More on Ed is available at www.StoneVentures.org.

## Network of Specialists

Through his network of sales, marketing, compliance, finance, and safety experts Stone has provided management, operational support and training programs to small, midsize, and large health care providers. Ed has served both as a consultant and in roles as Executive Vice President to business entities up to $1.5 billion in annual revenue.

- Data Mining and Software Developer, Chicago Based
- Growth and Staffing Specialist, Tampa Based
- Health Care & Safety Training & Program Development Specialist, Philadelphia Based
- Sales and Sales Administration, St Louis Based
- Infrastructure, Technical and Communications Specialist, Los Angeles Based
- Sales and Product Training Specialist, San Francisco Based
- Financial Operations Specialist, Philadelphia, and Los Angeles
- And more regional specialists

# Table of Contents

# COURSE CATALOG
# HEALTHCARE PROGRAMS

1. **Reimbursement 101**
   A simplistic introduction and history of healthcare reimbursement programs form the most basic indemnity plans to the more complicated shared risk and capitated managed care models. This program can tailored to meet the various provider needs and service sector.

   | | |
   |---|---|
   | *Course Designed for:* | Sales Teams, Customer Service, Intake, Admissions, Billing, and Collections. |
   | Prerequisite(s): | None |
   | Length | 1.5 Hour |
   | Venue: | Public Presentations and/or Dedicated on Site |

2. **Managing a Managed Care Market**
   A course designed to guide business leaders and sales teams on the business requirements and interactions necessary to ensure a smooth intake, billing and reimbursement environment in a mature managed care market. The course describes relationship issues and techniques for selling and contracting services.

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   |---|---|
   | *Course Designed for:* | Executive and Sales Management, Sales Teams, & Sales Support |
   | Prerequisite(s): | Reimbursement 101 (for non-experienced staff) |
   | Length | 1.5 Hour |
   | Venue: | Public Presentations and/or Dedicated on Site |

3. **Provider Contract Assessment: *A Development Workshop***
   This customized a workshop is designed to work with management to establish various company-specific policies, operational guidelines, business rules, and contractual language standards for payer contracts. The resulting guide establishes a checklist of language items for review, inclusion and/or exclusion along with policy statements for each review standard. This program focuses on establishing standards for all types of carrier/payer contracts.

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   |---|---|
   | *Course Designed for:* | Executive, Sales & Financial Management |
   | Prerequisite(s): | Reimbursement 101 (for non-experienced staff)<br>Managing a Managed Care Market (for non-experienced staff) |
   | Length | By Quote |
   | Venue: | Dedicated on Site |

# COURSE CATALOG
# HEALTHCARE PROGRAMS

**4. Contract Administration, Implementation & Operations:** ***A Development Workshop***

A 2-part workshop. The first part is designed to develop an operational guide for designated staff on the business requirements and operational requirements of each approved and executed contract. From the knowledge and data gained in other courses and workshops, this workshop creates a summary disclosure operational data sheet necessary to ensure contract compliance for intake and billing.

The second part is designed to establish a contract-compliance review and metrics process that ensures both internal and external compliance. Establishing this review program ensures your operational requirement have been established and are functioning as required to ensure timely and accurate payment of claims. This process also establishes additional metrics, a scorecard and a default management process necessary to impose corrective and mitigation actions.

*Course Designed for:* Sales, Financial and Billing/Collection Management

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| Prerequisite(s): | Reimbursement 101 (for non-experienced staff) |
| | Managing a Managed Care Market (for non-experienced staff) |
| Length | By Quote |
| Venue: | Dedicated on Site |

**5. Anatomy of a Payer Presentation**

A course designed to guide designated business leaders in the best practices method for communicating contract and claims default issues with all types of third party payers. In general this program establishes presentation guidelines that are best served by provider to payer contract or executive management.

The program establishes a process for staff to review and quantify defaults, document and qualify examples of issues for presentation. The process further establishes a very formal methodology for the actual presentation. The outcome is professional package that includes and executive summary (a financial impact disclosure and a summary of the default issues) and sample exhibits for each primary area of default. Exhibits include specific contact terms/language excerpts, along with the actual claims and supporting documents that establish compliance on the part of the provider.

*Course Designed for:* Sales Financial and Billing/Collection Management

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|---|---|
| Prerequisite(s): | Data Mining 101 (if presented in a dedicated session) |
| Length | 2 Hours if presented in a public session |
| | 4 Hours (Includes a working session with live company data) |
| Venue: | Public Presentations and/or Dedicated on Site |

# COURSE CATALOG
# HEALTHCARE PROGRAMS

6. **Sequential Guide to Billing Integrity**

This course is designed to guide providers in processes that establish integrity in billing practices. Billing integrity begins with establishing knowledge of the market for specific products and services. This course also provides an emphasis on new products and services that may not be well established in the area of billing and reimbursement methodology. Included are the following topics:

- Establishing Market Value and Pricing
- Establishing Clinical Indicators and Contra-Indications
- Establishing a Clear Path to Coverage and Reimbursement
- Establishing Internal Product or Service Specific Operational Guidelines including documentation requirements and standards
- Presentation of Service Offerings (coding and descriptions for claims)

*Course Designed for:* Financial, Billing and Collection Management

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|---|---|
| Prerequisite(s): | Reimbursement 101 (for non-experienced staff)<br>Managing a Managed Care Market (for non-experienced staff) |
| Length | 3 Hours |
| Venue: | Public Presentations and/or Dedicated on Site |

7. **Data Mining 101**

This course is designed to guide providers in establishing data mining processes that can be used to support many aspects of assessment and operational pursuit of compliance issues and reimbursement of claims. This course goes beyond the reporting processes for unpaid or short-paid claims to include trends and comparative assessment for like claims processed with varied outcome (no-pattern) or under non-compliance with a contract.

*Course Designed for:* Financial, Billing and Collection Management, Systems Support

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|---|---|
| Prerequisite(s): | Reimbursement 101 (for less-experienced staff) |
| Length | 1.5 Hours |
| Venue: | Public Presentations and/or Dedicated on Site |

StoneVentures also provides specialists with substantial health claims data mining experience. These specialists contract for both individual initiates as well as for long-term consultation and interventions with software vendors.

# COURSE CATALOG
# HEALTHCARE PROGRAMS

8. **Establishing a Compliance & Regulatory Affairs Program**

This course is designed to outline requirements and processes as necessary to establish a compliance and regulatory affairs program. The approach is designed for small (from start-up) to mid-size provider operations with no current formal program and without a responsible dedicated staff. The program provides divisible responsibility guidelines within existing management in a modular and scalable approach that easily migrates to a dedicated staff manager as the company grows.

Also included are the following topics:

- Bad or Outdated Regulations Impact your Business? Change Them!
- Documentation
- Communications & More Documentation
- Correcting Deficiencies. *And More*

*Course Designed for:* Executive and all Mid-Level Management

| | |
|---|---|
| Prerequisite(s): | Sequential Guide to Billing Integrity |
| Length: | 3 Hours |
| Venue: | Dedicated on Site |

9. **Advanced Appeals Workshop – Module 1**

This 2-part workshop first presents selection guidelines, strategies and tactics to manage Billed and denied claims with a point-by-point counter approach to points of justification. The second half of the workshop then uses live data and denied claims to create actual appeals for filing. The workshop also delivers a database of appeal language that can be automated into point-by point appeals letters composed by system generated documents or generated manually (in less than 1 minute) by collections staff using word processing programs.

Also included are the following topics:

- Patient, Beneficiary, and Sponsor Involvement
- Filing Standards, Requirements, and Regulatory Avenues

*Course Designed for:* Financial, Billing and Collection Management, Systems Support

| | |
|---|---|
| Prerequisite(s): | Reimbursement 101 (for less-experienced staff) |
| Length | 2 Hours if presented in a public session<br>6 Hours (Includes a working session with live company data) |
| Venue: | Public Presentations and/or Dedicated on Site |

# COURSE CATALOG
# HEALTHCARE PROGRAMS

**10. Advanced Appeals Workshop – Module 2**

This module is a custom approach to develop guidelines and logic as required to automate appeal filing and liability transfer processes based on electronic (electronic remittance) and/or manual claim remittance outcomes as entered in the billing or accounts receivable software

*Course Designed for:* Collection Management & Systems Support

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| Prerequisite(s): | Advanced Appeals Workshop – Module 1 |
| Length: | By Quote |
| Venue: | Dedicated on Site |

**11 Tele-Collections Workshop**

This workshop is designed for staff level collectors that primarily collect from patients and other direct-pay payers (non-insurance claims). The workshop presents strategies, tactics and style and then conduct a role-play with real-life issues as presented by collectors. Presentation topics include:

- Avoiding service complaints as the excuse for non payment
- Helping the elderly understand their liabilities
- Balances as a result of denied claims (alternatives)
- Balances as a result of designated patient portions (co-payments)
- Bad Checks
- Alternatives to hard-core demands
- How <u>not</u> impact referral sources
- Deferrals to attorneys and other payers

*Course Designed for:* Collection Staff

| | |
|---|---|
| Prerequisite(s): | Reimbursement 101 (for less-experienced staff) |
| Length | 2 Hours if presented in a public session<br>4 Hours (Includes a working session with live company data) |
| Venue: | Public Presentations and/or Dedicated on Site |

# COURSE CATALOG
# HEALTHCARE PROGRAMS

**12. Business Process: Outsourcing:** ***A Development Workshop***

This workshop is designed to establish guidelines for specific outsourcing initiatives in the reimbursement (primarily intake/service authorizations, billing and collection) sector of provider operations. Outsourcing is never as simple as turning the process over to a third party! Third parties can never fully embrace or understand your business interests and understand the market impact of their program. To that end this custom designed and hosted workshop assesses the outsource initiative, the contracted company's abilities and then establishing operations guidelines that include mandatory escalation, termination, and suspense processes.

*Course Designed for:* Designated Operational Management

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|---|---|
| Prerequisite(s): | Reimbursement 101 (for less-experienced staff) |
| Length | 2 Hours if presented in a public session |
| | 4 Hours (Includes a working session with live company data) |
| Venue: | Public Presentations and/or Dedicated on Site |

**13. Business Process: Outsourcing:** ***A Development Workshop – Module 2***

This workshop is designed to formally establish specific written guidelines for specific outsourcing initiatives planned by the business entity with contracted outsource agents.

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| Length: | By Quote |
| Venue: | Dedicated on Site |

**14. Benefits Assessment & Service Authorizations – Module 1**

This course is designed to outline requirements and processes necessary to establish a comprehensive program that ensures that the patient intake process documents a clear path to reimbursement (or qualifies the case for charity care) for each service being requested. Presentation topics include:

- Understanding Benefit Classifications
- Understanding Service Alternatives
- Understanding & Challenging Medical Policy (Appealing Denied* Services)
  *Denied services before services were provided (not a claim denial)
- Understanding Regulatory Provisions
- Commination Techniques (Electronic and Verbal Scripts)
- Documentation!
- Understanding how this process impacts outcomes (collections)

| | |
|---|---|
| *Course Designed for:* | Designated Intake Staff & Management |
| Prerequisite(s): | Reimbursement 101 (for less-experienced staff) |
| Length: | 2 Hours |
| Venue: | Public Presentations and/or Dedicated on Site |

# COURSE CATALOG
# HEALTHCARE PROGRAMS

**15. Benefits Assessment & Service Authorizations – Module 2 *(Workshop)***

This workshop is designed to role-play and for staff to present live data scenarios to establish and document strategies, techniques and appeal language (including clinical language) to counter the justification as presented by the payer).

*Course Designed for:* Designated Sales, Clinical*, & Intake Management

Prerequisite(s): Reimbursement 101 (for less-experienced staff)
Benefits Assessment & Service Authorizations – Module 1
Length: By Quote
Venue: Dedicated on Site

*Clinical support is critical to the success of this workshop.

**16. Strategic Marketing Initiative – Marketing Services, Getting Paid!**

This workshop is designed to consult and provide guidance to providers on delivering new products, services and technology to the health payer sector. In healthcare it's a known fact that selling a great new product, service or technology is much easier than ensuring payment. To that end this workshop is designed to review the market, the product, service or technology as a means to establish a strategy to ensure positive reimbursement outcomes.

*Course Designed for:* Executive, Sales, and Clinical* Management

Prerequisite(s): Reimbursement 101 (for less-experienced staff)

*The host can provide (and may require) a panel of experts in areas familiar with similar or corresponding products, services or technology solutions.*

Length: By Quote
Venue: Dedicated on Site

*Clinical support may be critical to the success of this workshop.

**17. Family Emergency & Disaster Planning Workshop for Healthcare Workers**

This workshop is designed for individuals providing vital services in the community that must continue in times of local, regional and national emergencies. Individuals that must remain on duty or report for duty in time of an emergency must have a plan to ensure their family members will be self-sufficient and stable. This workshop has been presented nationally in the public safety sector and has featured in local communities for the general public on television. The workshop begins with a template and ends with a functional plan. No one leaves without a plan! The topics included are:

- Communications (family, friends, co-workers and patients)
- Alternate Meeting Locations
- Alternate Places to Stay
- Care, Medication and Food Requirements for Family Members
- Transportation Alternatives
- School Emergencies (Children)
- Planning for Pets
- Insurance Needs (Asset Documentation)
- Emergency & Evacuation Supplies

*Course Designed for:* All essential personnel and staff

Prerequisite(s): None

*The host usually requires a panel of local experts in areas familiar with local emergency planning, usually police or fire representatives. This usually cost neutral, but may impact scheduling.*

Length: 2 Hours
Venue: Public Presentations and/or Dedicated on Site

# Course Catalog
# HealthCare Programs

**18. Family Emergency & Disaster Planning Workshop for Business Entities**

This workshop is designed for businesses providing vital services in the community that support staff and work within the confines of a disaster scenario as related to their individual family emergency plans. This workshop begins where the Family Emergency & Disaster Planning Workshop for Healthcare Workers leaves off. This workshop results in dedicated and entity-specific plan. The topics included are:

- Communicating with all parties while on duty
- Supporting the needs of staff's families
- Staging resources and housing staff
- Transportation
- Scheduling and off-duty planning
- Mutual Aid program development (outside community planned assistance)
- And more…

*Course Designed for:* Management Team

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|---|---|
| Prerequisite(s): | None (Generally done in conjunction with course 17) |
| Length: | 4 Hours |
| Venue: | Public Presentations and/or Dedicated on Site |

**19. Family Emergency & Disaster Planning Workshop for Patients**

This workshop is designed for patients and family members of home-based patients that require a higher level of assistance in an emergency. The homebound, under temporary rehabilitation, non-ambulatory (temporary or permanent) requires many daily support functions. In an emergency these functions may cease. This workshop helps parties develop contingencies for various local risk factors as well as daily support needs. This workshop includes all aspects of the general family emergency planning workshop (course #20) with a high emphasis on the patient inability to self-help at some level. Additional and focus topics include:

- Communications (family, friends, and other caregivers)
- Evacuation and Transportation Alternatives
- Medical Records
- Care, Medication and Food Requirements
- Medical Emergency & Evacuation Supplies
- Utilities Requirements (Power for medical devices)

| | |
|---|---|
| Prerequisite(s): | None |
| Length: | 2 Hours |
| Venue: | Public Presentations and/or Dedicated on Site |

# COURSE CATALOG
# HEALTHCARE PROGRAMS

**20. Family Emergency & Disaster Planning Workshop for Civilians**

This workshop is designed for family participation in a simple approach to creating, sharing and executing a family emergency plan. This workshop has been presented nationally for 15 years and has been featured in local communities for the general public on television. The workshop begins with a template and ends with a functional plan. No one leaves without a plan! The topics included are:

- Local and Regional Risk Factors
- Communications (family, friends, co-workers and patients)
- Alternate Meeting Locations
- Alternate Places to Stay
- Care, Medication and Food Requirements for Family Members
- Transportation Alternatives
- School Emergencies (Children)
- Planning for Pets
- Insurance Needs (Asset Documentation)
- Emergency & Evacuation Supplies

*Course Designed for:* Everyone

Prerequisite(s): None

*The host usually requires a panel of local experts in areas familiar with local emergency planning, usually police or fire representatives. This usually cost neutral, but may impact scheduling.*

Length: 2 Hours
Venue: Public Presentations and/or Dedicated on Site

*Additional versions of this program have been specifically designed for public safety agencies and other governmental entities in including governing bodies. The program is adaptable to nearly any business and can be customized for individuals, agencies and business specific requirements.*

# COURSE CATALOG
# HEALTHCARE PROGRAMS

**21. Incident & Disaster Action Plans for Home Health Caregivers**

This course was designed to provide caregivers the necessary information to create an incident action plan so that in the event of an emergency or disaster they will be able to remain safe at their current location. The course focuses on staff in the field and the ability to know resources and critical requirements of each location assigned. This course requires the first visiting caregiver to establish the plan that then remains on site for any and all subsequent caregiver visits. Topics included:

- Community Risk Assessment
- Physical Location Safety Assessment & Plan
- Utility Emergency Plan
- Communication Plan
- Self and Patient Evacuation Plan
- Shelter-in Place Assessment & Plan

*Course Designed for:* Home Health Caregivers and Home Health Managers

Prerequisite(s): None
Length: 1.5 Hours
Venue: Public Presentations and/or Dedicated on Site

**22. Home Health Incident & Disaster Action Plan Training Workshop**

This workshop was designed for entities and agencies management and supervisory staff to conduct the training course described in course 21. This workshop can be fully dedicated to specific businesses and be packaged as a proprietary program utilizing and/or supplementing existing policy and procedures.

*Course Designed for:* Home Health Business Managers

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|---|---|---|
| Prerequisite(s): | None (Generally provided prior to course 21) | |
| Length: | See Below | |
| Venue: | Public Presentations | 1.5 Hour (Generic guidance only) |
| | Dedicated on Site | By Quote |

# COURSE CATALOG
# HEALTHCARE PROGRAMS

**23. Basic Business Continuity – Plan for Interruptions**

This course provides scenarios and offers solutions to the most common business interruptions. From a day to a year, big or small, local or regional, any disaster can destroy a business. This course presents a variety of critical and business disaster recovery needs in a format that participants can assess the likely support requirements and then plan to execute the acquisition of that support requirement. From data to power to supplies to office space to HIPAA issues, these requirements are but a few contingencies discussed in the course. This program has been presented at regional and state home care association meetings since 1990 as well as for individual business entities, some of which used to information during major events that otherwise may have destroyed the business.

*Course Designed for:* Executive and Business Managers

Prerequisite(s): None
Length: 2 Hours
Venue: Public Presentations and/or Dedicated on Site

**24. Business Continuity Planning Workshop**

This workshop has been designed to accommodate a consultative role for specific business entities needs. This workshop is designed in cooperation with the business management as a means to assess existing plans (if any) and establish a simplistic set of operational plans along with staff designations under the methodology used by public safety agencies knows as the Incident Management System.

*Course Designed for:* Executive, Operations, and IT Managers

Prerequisite(s): None
Length: By Quote
Venue: Dedicated on Site