



Utilizing CBIZ's Touch-Free, Patient-Facing Eligibility™ Process to Meet the Challenges of COVID-19



HIGHLIGHTS

- A reconfigured Medicaid eligibility process implemented to meet the urgent eligibility needs of our clients
- A process that will meet the eligibility needs of the patient population whether we are on- or offsite
- A process that enables us to maintain our eligibility approval rates and ensure revenue stabilization for our clients



The Challenge

As a result of the COVID-19 pandemic, CBIZ KA Consulting Services, LLC (CBIZ) has taken action to ensure that our clients and their respective patient populations experience no interruptions in our Medicaid eligibility services. For over 20 years, the success of CBIZ's Medicaid eligibility process has been rooted in a patient-advocate, boots-on-the-ground approach, emphasizing a face-to-face screening process, which has included bedside and home visits.

With the changes in onsite staffing and new social distancing guidelines resulting from COVID-19, CBIZ reengineered a number of our practices to ensure that patient eligibility applications would continue to be processed as quickly as possible. In this new paradigm, CBIZ had to reconfigure our eligibility process to maintain our patient-advocate approach. To meet these challenges, we developed a new Touch-Free, Patient-Facing Eligibility™ process.

As we started to work through the changes that needed to be made in our process, the most significant challenge that we faced was the difficulty in completing the application process for qualified patients without a face-to-face interaction. The Medicaid eligibility application process can be complex, and it often demands extensive documentation and patient signatures.

Prior to COVID-19, in our patient advocate role we assisted patients, hands on, in the application process, helping them compile required information and obtain necessary signatures. But with the new restrictions, we weren't able to be onsite with patients and their families and could no longer easily obtain a self-attestation from the patients. These new circumstances could have delayed or derailed the process to complete full applications without significant changes to our existing processes.



Our Solution

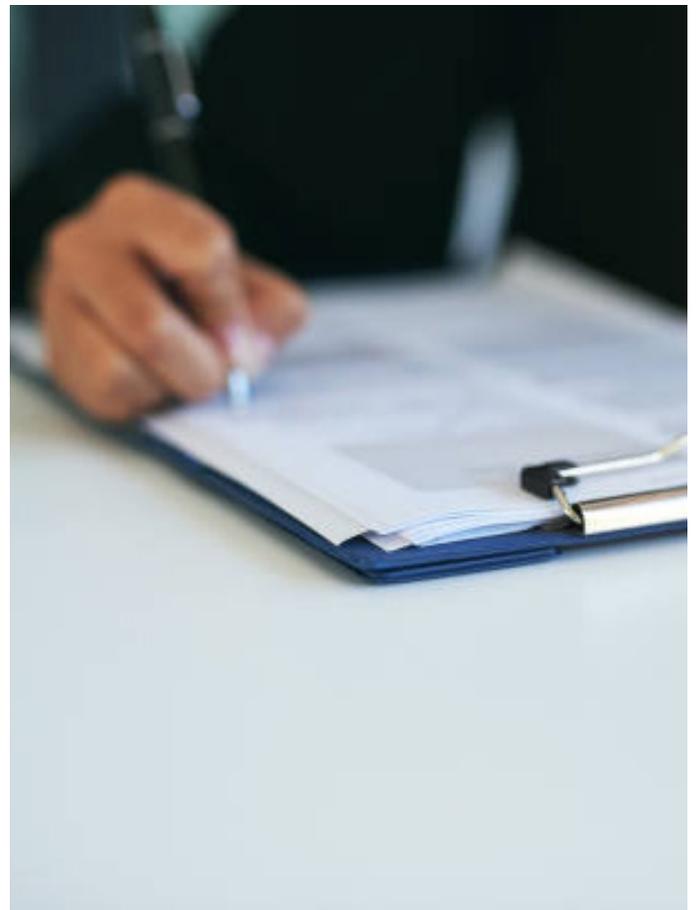
In the COVID-19 environment, CBIZ implemented the following steps in our eligibility process:

- We connected with patients via phone calls while they were still at the hospital.
- We verified patient contact information and determined if patients potentially were eligible for federal and/or state programs.
- We created a document repository for each patient via email. This made the application process easier and faster, and maintained compliance with social distancing requirements.
- We set up secure, designated drop-off areas for patients to submit required documents. Our site representative picked up the documents on a frequent basis.

While patients remained in the hospital, we used resources such as our proprietary patient-tracking system, the hospital's information system and alternative contact information provided by patients. These efforts helped us obtain patient insurance information for our clients, update patient contact information for better follow-up results and submit presumptive eligibility (P/E) applications (in applicable states) in a timely manner.

As a result of hospital-specific guidelines and new state regulations, the process for submitting Medicaid applications changed at many of our client sites. Our team undertook the following initiatives to address these changes:

- We completed applications with documents received through mail or email.
- We electronically submitted, mailed and faxed applications, and also emailed Medicaid offices to ensure compliance with date-of-service application windows.
- We strove to submit presumptive eligibility applications under state submission deadlines.

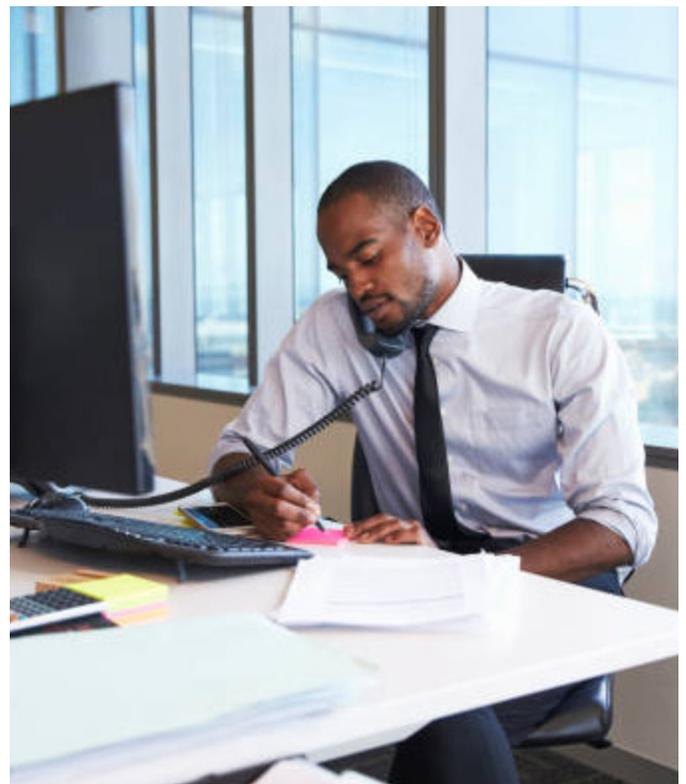


CBIZ also adapted its application follow-up process. Below are many of the steps that we undertook:

- We monitored client A/R reports to ensure that we received all of the accounts needed for follow up. We then divided these accounts among our staff for follow-up phone calls and mailings.
- We utilized CBIZ's proprietary tracker database for follow-up notes and contact letter generation.
- CBIZ representatives called patients daily and mailed contact letters weekly to keep the information flowing and to answer questions that could have delayed the application process.
- Representatives visited each drop-off site frequently to pick up patient documents critical for the application process.
- We connected with state and federal contacts and adjusted our process to their new working conditions, ensuring that applications continued to be submitted in a timely fashion.
- We followed up with doctors' offices for FD-80s (Emergency medical condition certification from the attending physician – Emergency Medicaid) on an electronic basis to ease data transmission and to expedite the process.
- We kept daily contact with case management and billing departments. We continued to have, at a minimum, weekly contact with our clients' key stakeholders.

The Outcome

CBIZ's ability to rapidly implement our Touch-Free, Patient-Facing Eligibility™ process has enabled us to achieve our primary goals: to maintain Medicaid revenue stability for our clients and to shepherd new patients unfamiliar with Medicaid eligibility through the eligibility process. We achieved these goals by developing a process that maintained our patient-advocacy approach. We don't believe in just handing an electronic device to a patient and asking him or her to complete an application. We know that more work is required to complete the application process so that they can meet standards for approval. As a result of our efforts, our rates of Medicaid application approvals have remained at the same industry-leading levels that we achieved prior to COVID-19.



The Ongoing Challenge

Even as hospitals begin to see the return of more traditional patients, the challenges associated with screening patients for Medicaid eligibility will continue. Onsite access to patients will continue to be limited and the paper trail will remain problematic in this new environment. However, our Touch-Free, Patient-Facing Eligibility™ process will enable us to meet these challenges.

Expanding Our Capabilities

CBIZ will continue to refine our processes to ensure our ongoing success with Medicaid eligibility. In the near future we will incorporate the following technology into our process:

- Online software that will allow patients to schedule, cancel or reschedule appointments with our staff.
- A remote meeting application via mobile device that will provide patients with the option to have a virtual screening. Patients who have this capability will be able to complete an application from start to finish with potentially fewer delays.
- A mobile application that allows patients to scan and upload documents from their phone.

Conclusion

CBIZ's Touch-Free, Patient-Facing Eligibility™ process addresses the immediate demands of maintaining our Medicaid eligibility process without having onsite access. The emergent nature of COVID-19 demanded that we act decisively to contact affected patients and their families to shepherd the application process. As a result, we reconfigured our eligibility process with urgency to meet the eligibility needs of our clients and their patient populations.

The success of our program ensures that we can confidently meet our clients' eligibility needs whether we are on- or offsite. Although our process includes a number of new technologies and workflows, the bedrock of our program remains the same – we are patient advocates first. This approach leads to increased eligibility reimbursement for our clients and additional eligibility for patients. We will continue to refine our processes to assist patients in this new environment. We also know that our approach ensures patients will not be left behind and that hospitals can be confident that they will receive optimal eligibility reimbursement when utilizing CBIZ.

