Procentive

FAQ’s and Expectations

Implementation and Consultation

How long is the implementation and consultation process?

Three months. We will be meeting every week at the designated time for 2 hours. This time slot is reserved for you. If you need to cancel a training, please call your trainer. Rescheduling may or may not be an option depending on your trainer’s availability.

What are the characteristics of a successful champion?

Champions are key people in your agency who will be responsible for your database setup and implementation. To be successful, Champions must be staff who:

- are able to make setup and implementation a priority;
- are committed;
- have greatest sense of how your agency functions and have the ability to make procedural decisions;
- have the ability to train other staff.

Best Practice Tip: Have your department heads involved. Generally, this means your main biller and your clinical director. For larger agencies, this could include an Intake specialist, or it could include the Clinical Director of different programs — especially if the needs and processes of those programs are distinct from one another.

How do we decide who our champions should be?

Whenever possible, Champions should be people who have:

- *Deep knowledge* about their areas of expertise within your business
- *A positive attitude* especially about new technology and change
- *An ability and desire to teach others*. We follow a “train-the-trainer” methodology, so as we train your Champions, your Champions will then train the rest of your staff
- *Time*. There will be weekly homework assignments that must be completed for implementation to be successful, so Champions need some extra time each week not just for training, but for homework, too
- *Decision-making power*. Many decisions will be made about how to best use Procentive for your agency, so Champions need the knowledge and authority to make decisions whenever possible

How many champions should I choose? What roles need to be in training?

The short answer is: “As many as are needed, and no more.”

In general, each department of your business should be represented within the champion list. If you think in terms of the life cycle of a patient, there must be enough champions in training so that each step in the process — from intake to discharge — can be transitioned into Procentive. Typically, this includes at least one of the following “kinds” of champions (Keep in mind, some of the following roles can be filled by a single individual or multiple; and in some smaller agencies, a single person might serve or have expertise in more than one role):

- Billing/Claim/Revenue Specialist

    - This person is your revenue expert. They know which CPT codes you bill, the rates you charge for services, the payers you send claims to each day, and the unique claim submission rules (if there are any) that are part of sending clean claims. They post payments and track down denials. Smaller agencies might have just one billing champion; larger agencies usually have more.
- Clinical Specialist
    - This may be your Clinical Director, or if you have several programs, each with their own unique process, these may be the Clinical Supervisors of each program. The clinical specialist understand your documentation process, from intake to the DA to the Treatment Plan, Case Notes, and beyond. They also have a grasp of any reporting that is required for the services they provide.
- Intake/Front Desk
    - This person interacts with your patients each day, perhaps managing the Appointment book, or doing the data entry for new patients. For smaller agencies, this can sometimes be the billing specialist, but for larger agencies there is usually an individual that is responsible for these processes.
- CFO/Finance Manager
    - This person is in charge of the books. They aren't always attending each training session, but they have a keen interest in making sure the numbers are getting tracked correctly. Sometimes, these staff are involved in the initial setup of Procentive (making sure the correct locations, programs, payers, etc are getting set up). Then later on in training, after "real" data has been entered, this person will return to training so we can show them which reports they will use to gather the data they need.
- Quality Assurance
    - Usually, this unique role exists in larger agencies. But even smaller offices will have someone that fills this need — of making sure that services are being provided in a way that meets government — and your own internal standards.

Which champions should be present at which meetings?

Please do not invite all staff to these meetings. This is not a time for training all staff. This is a time to input and refine the necessary components of your database. In addition, staff assigned a champion role within Procentive will have the ability to see and do things other staff cannot.

- Introductory Training (during Phase 1): All Champions
- Clinical Process Review (during Phase 1): Lead Clinical Champion
- Ongoing Weekly meetings: All Champions*
  **Clinical champions can step out during Phase 2. This is where we will concentrate on daily billing practices. They are welcome to stay, but this will likely not be the best use of your clinician's time. They should join back up during Phase 3.*

- Advanced Clinical Consultation (during Phase 3): All Clinical Staff

  This time is set aside to take all clinical staff through the process. This can be done once all forms are complete and your agency has given Procentive a final sign-off.

What is the purpose of assigning a lead billing champion and lead clinical champion?

These leads will have one extra permission in Procentive: the ability to request changes through Procentive's ticketing system. These changes could be key components to the way your database is setup. This extra permission should be given to staff that have the greatest sense of how changes will affect key areas in your agency.
Please discuss with your trainer if you feel there is a need for more staff to have this permission. Our general rule is to allow this permission on a 1 to 10 ratio. For every 10 staff that you have, one staff should have this permission.

In addition, the lead clinical champion will be meeting with Procentive's forms consultant to develop your agency's online forms. We ask that only one person be requesting changes made to forms via ticketing, to limit confusion. If you have different departments/programs, where a particular champion is not knowledgeable of the other's area, both may attend.

How much estimated time should our champions set aside each week for setup and implementation (inputting information, watching videos, etc.)?

	Phase 1	Phase 2	Phase 3
Clinical Champions	5-10 hours	5-10 hours	—
Billing Champions	2-4 hours	2-4 hours	—
Administrative Champions	2-4 hours	2-4 hours	—

- The time estimated above is outside of the scheduled weekly meeting time.
- Phase 1 is essential to the rest of the process. If setup in Phase 1 is not completed in the time allotted, it can hold up the entire implementation process and compromise your benefit from consultative time.

Who will train other staff?

The training module in Procentive contains training courses broken out by role. Your champions have the ability to assign these courses to individual staff. Your champions will serve as your on-site experts for Procentive. They will have the greatest sense of how your agency has decided to use Procentive.

When should other staff be trained?

The point at which other staff will be trained on Procentive varies from agency to agency. As your champions are working through the setup and implementation phases, changes will likely be made to your database. Once your champions have completed a process and made any necessary changes, they can train additional staff. We have found that staff will learn best from real-life examples, instead of hypothetical ones. If you have further questions or concerns about the timing of staff training, please has this discussion with your trainer.

Advanced Clinical Consultation:

When your online forms have been completed and your agency has given a final sign-off on all forms, one final clinical consultation will be held for your clinical staff.

You may choose from two options:

1. Train all clinical staff on "A day in the life of a clinician", covering the process of Appointments to Time to Clinical Charting.
2. Train all clinical champions on processes and on the advanced features of clinical charting.

When can we log in and start using the system?

You will be given login information in the introductory training and may log into your database following this meeting. As part of our standard database setup procedure, we create a fake client (Jon A. Doe) and give you access to our Procentive standard forms. Once you have watched a training video on a given function, feel free to test with Jon A. Doe. Adding additional staff is a task your champions will learn how to do early in the process.

How much support do we have and what type?

We want your training experience to be successful and positive. So Procentive offers a variety of tools designed to help you understand the product, and to get you the answers you need, when you need them. When you have questions during implementation, here are the best methods for customers to use:

1. Watch the Training Videos and read the help files in the Training Module. Each video covers the basics of each module or topic, so they are an excellent way to begin learning about Procentive.
2. Prepare for and attend each weekly training session. This includes watching any videos that your trainer has assigned to you, getting any homework done from the previous week, and maintaining a list of questions that have come up since your last training session. In our experience, those customers that complete each of these steps every week are more successful and experience a much smoother transition onto Procentive.
3. Use the Ticketing Module. Outside of training time, send your questions through the Procentive Ticketing Module. Outside of your designated training time, ticketing is the preferred method of requesting support. These tickets will go directly to your Procentive trainer while you are meeting with them. Our ticketing system is fully HIPAA compliant. Please do not send any screen shots or customer information via email. We are required to report this as a HIPAA violation.
4. Your Procentive trainer has set aside the 2-hours each week to review your setup and answer any questions that have come up. Your trainer will introduce you and point you to new modules and training videos along the way. Your Procentive trainer will not train you on the basics of Procentive features and functions. This is what the training videos are designed to do. It is important that you watch the videos and bring practical questions on how this applies to your agency to get the most help from your trainer.

When will we bill through Procentive for the first time?

Procentive

As long as your champions are keeping up with assigned homework and completing tasks weekly, we could submit the first live claims out of Procentive during week 4 of training.

When will we get our “first look” at forms in Procentive?

Procentive will give your agency access to our standard form set when we set up your database. Once you have your login information (Introductory training), you will be able to view these forms.

What determines the pace at which we move?

- Complexity of your agency
- Number of people present in training
- Learning style and level (please complete the E-Learning survey)
- Submitting ticket throughout the week vs. holding all questions for weekly training session
- Completing weekly homework and assigned tasks
- Re-watching videos, if necessary, instead of asking your trainer to show you
- Being mindful of any internal staff discussions that could take place outside of the weekly consultation time can be helpful.