CASE STUDY

WEHRMAN HEALTHCARE MANAGEMENT SOLUTIONS SAVES CLIENTS MONEY

THE CHALLENGE: A PAPER-BASED BILLING WORKFLOW MEANT CLIENTS WERE PAID MORE SLOWLY — AND THE BILLING COMPANY WAS WASTING TIME

THE RESULT: POSTAGE SAVINGS FOR CLIENTS, A STREAMLINED WORKFLOW, FASTER REVENUE CYCLE, BETTER OVERSIGHT

In 2008, Wehrman Healthcare Management Solutions was still running its business entirely on paper — but owner Greg Wehrman knew how inefficient such a workflow was. So when Wehrman met eBridge CEO Leslie Haywood at an HBMA conference, a paperless workflow already made perfect sense to him.

Today, the San Diego, CA-based company has developed a more streamlined workflow, allowing providers to scan or upload their charges into eBridge, creating new efficiencies with the use of offshore billers, and making it simpler for Wehrman to oversee his staff and resolve issues with providers, patients, and insurance companies and other payers.

eBridge has also helped Wehrman's clients save money.

"One of the things they all love is they save a ton on postage. One client is the busiest guy on the planet, and he was spending about $20 to $30 per week on postage. He bought a scanner and still came out ahead," Wehrman said.

"I also love it because I'm getting stuff more quickly. Mail can take two or three days even from within San Diego County. If you scan it, you get it the same day, so it's at least two or three days earlier you can get your payments."

Depending on their size and complexity, Wehrman's provider clients will scan or upload files directly into Wehrman's eBridge cabinet. Many providers also submit charges via paperless fax, which Wehrman's staff uploads to eBridge using the Print Driver. This eliminates the need to print and scan that fax — or any other document originating on the computer — thereby saving time and paper. Anything Wehrman does receive on paper is kept in a secure physical filing cabinet for 60 days, to eliminate the possibility of lost information due to an illegible or incomplete scan. Once 60 days has passed, it goes into one of three bins to be shredded. And while that means there is still some paper in Wehrman's office, it's a far cry from the volume they once stored.

"Instead of 10 years worth of documents at an off-site location and the monthly bills that come with that, I have 60 days of documents at my office. It saves a ton of money," Wehrman said.

eBridge's annotation feature comes in handy when resolving issues before submitting a claim or making notes regarding a discrepancy in posted payments. For instance, if a charge is missing because the provider forgot to include a diagnosis, Wehrman can call that doctor, obtain the proper code, and add an annotation to the first page of the document along with the date and time and his initials.

All documents that come into Wehrman Healthcare go through billing intake coordinator Naomi Frakes, who then assigns batches to billers. When Frakes logs into her account each day, the first thing she looks for is accounting and due date errors, followed by the way batch types have been assigned.

"Sometimes, there will be tiny things like accounting date issues, and that's the kind of stuff that leads to misplaced documents," said Frakes. "So I realized we have to do a wildcard search every month at the same time to make sure nothing's coming through that we're not seeing on someone's board because of the way it was entered."

Frakes also walks each new provider to through Wehrman's indexing and scanning conventions — how to organize batches, how to use the batch type field, etc.

Frakes said eBridge has greatly improved the way that Wehrman does business.

"We used to have people with stacks of files and they would search for one EOB for hours," she said. "Just the amount of time we've gained from it is a big deal."

HOW IT WORKS
WEHRMAN HEALTHCARE'S PROCESS

Wehrman Healthcare Management Solutions set up its seven indexes within eBridge as follows:

- Clients
- Due date
- Accounting date
- Batch type
- Biller
- Status
- Payment amount

Clients who scan or upload charge batches do so with a unique login. The "clients" and "biller" indexes have been configured so that the fields are prefilled depending on each client's login, and cannot be changed by the provider — "Clients" will show whichever provider name the login is tied to, while "Biller" is set to billing intake coordinator Naomi Frakes, as she reviews all new batches before they are assigned to in-house or offshore billers.

Providers use "accounting date" to enter the date they are uploading their charge batches, and "due date" seven days in the future. Providers enter the batch type using a dropdown field of options that Wehrman has hard-coded into the system. "Status" and "payment amount" are left blank at the outset.

Each day, Frakes logs into her account and reviews all new batches by viewing everything with a blank status that is assigned to her as a biller. She then assigns those batches by selecting a biller from the "Biller" dropdown. When that biller begins working the batch, they change the status to "in progress."

Once the assigned biller completes a charge batch, an in-house biller reviews the batches and changes the status to "completed." All offshore billers change the batch status to "back to WHMS." At this point, an in-house billing supervisor resolves any questions or missing information that needs to be addressed before the claim can be submitted. The supervisor then changes the status to "completed."

Wehrman's staff can then view any pending claims by running a search for the status "back to WHMS" and working that list from bottom to top.

"By having a separate biller field, I can come in with my name, hit the wildcard key ["!"], and for anyone, this becomes a work list," said Wehrman. "The first thing you come to with a blank status field is the first thing you work on."

In addition to its provider clients, Wehrman has set up "credentialing" as a dropdown option on the client index. Here, any outgoing application is scanned before it's mailed, and any incoming documents are scanned, as well.

"We just find that if there is a question down the road, they are easier to find, and then the eBridge search feature helps us find keywords within a provider contract," Wehrman said.

"Reference" is also listed as a value under client, for notices from insurance companies, Medicare, and other payers that Wehrman's staff should be aware of. Staff minutes also go into eBridge using its designated option under the "client" index.

"That's pretty cool because if somebody didn't attend a staff meeting, you can see if they've opened the minutes by viewing the audit trail," Wehrman said.

By setting up his company's workflow in this manner, Wehrman is able to more easily oversee his staff and the offshore billers by regularly running audit reports to reveal an employee's average turnaround time.

ABOUT EBRIDGE