Applying the Learning Collaborative Model to Dynamically Support Billing Capacity in Local Health Departments: Lessons from Texas and Idaho

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Learning Objectives
By the end of this webinar, participants will be able to:
• Describe the learning collaborative model
• Identify factors that contribute to the formal collaborative process
• Outline a process for initiating a learning collaborative in a state/jurisdiction

Cardea
Training – Organizational Development – Research and Evaluation

Improve organizations’ abilities to deliver accessible, high quality, culturally proficient, and compassionate services to their clients

University of Washington Public Health Capacity Building Center

Provides capacity building assistance (CBA) to state, local, tribal and territorial health departments in the areas of:
• HIV testing
• Prevention with HIV-positive persons, with an emphasis on Data to Care
• Organizational development and management

Funding for this course was made possible (in part) by the Centers for Disease Control and Prevention (CDC). The views expressed by the speakers and moderator do not necessarily reflect the official policies of the Department of Health and Human Services (HHS), nor does the mention of trade names, commercial practices, or organizations imply endorsement by the US Government.

STD-related Reproductive Health Training & Technical Assistance Centers

Provide training and technical assistance to state and local public health programs to support their efforts in billing third-party payers for STD-related services

Funded by a cooperative agreement by the Office of Population Affairs, within the Office of the Assistant Secretary for Health in collaboration with the Division of STD Prevention within the Centers for Disease Control and Prevention, National Center for HIV/AIDS, Viral Hepatitis, STD and TB Prevention.

Additional Resources
• Billing & Sustainability 3-part webinar series www.cardeaservices.org/resourcecenter/setting-up-for-success-integrating-revenue-cycle-management
Additional Resources

  - In-House or Outsourced Billing and Outsourced Billing Company Considerations and Tips
  - Sample policies and procedures for billing and reimbursement
  - Clinic Confidential Billing Algorithm
  - Communicating with Staff and Clients webinar
  - EMR/EHR Factsheet
  - RN Billing & Coding FAQs
  - And many more!

What is a learning collaborative?

IHI-Style Learning Collaborative

Like organizations

Shared problem or desired outcome

Organizational Priority

Known Strategies

Cross Functional Teams (with the right members)

TEXAS REVENUE GENERATION LEARNING COLLABORATIVE
**DSHS, UT, Cardea Role**

Convene  
Logistics  
Research policies, forms, procedures, approaches  
Learning opportunities

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**Our offer**

If you will commit to making improved revenue generation an organizational priority and appoint dedicated, cross-functional team to tackle to address

We will provide access to the expertise and tools you need to be successful  
(no funds to LHD)

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**Texas Revenue Generation Learning Collaborative Partners**

Amarillo Department of Public Health  
Andrews County HD  
Austen-Travis County Health and Human Services Department  
Harris County Public Health and Environmental Services  
City of Houston Health and Human Services Department

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**Criteria for Learning Collaborative Participation**

Currently exploring revenue generation  
Eager to participate  
Willing to become peer champions  
Provide a cross-functional team  
Top leadership support  
On-site leader  
One-year commitment

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**Learning Collaborative Process**

**Preparation**  
Orientation Webinar  
Assessment  
Preparation for 2-day meeting

**2-Day Meeting**  
Learn about leading the change process  
Network with peers  
Develop plan for project

**Implementation**  
Lead meetings with onsite teams  
Implement project  
Receive support throughout the process

**Learning Opportunities**  
Webinars and Consultations  
Regular conference calls to learn about other projects  
Final 2-Day meeting

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**Assessment**
Cardea adapted the Transtheoretical Model of behavior change, or Stages of Change, developed by Drs. Prochaska and DiClemente, to identify benchmarks of organizational capacity building for revenue cycle management.

**Building Blocks for Revenue Generation**

**Purpose**

Meet participants in Learning Collaborative

Develop a shared understanding of how to implement change in your organization

Begin planning for project implementation

**Key Topics Presented**

- Systems Change
- Change Management
- Collaborative Leadership
- Reviewing Revenue Generation
- Building Blocks and Related Topics
- Effective Work Groups
- Project Management Tools and Resources
- Action Planning
- Quality Improvement

**Next Steps**

- Each LHD paired with the following support team:
  - One staff person from DSHS, UT, and Cardea

- Support teams provide:
  - Monthly check in on project progress
  - Connection to resources and information
  - Solicit Technical Assistance needs
  - Coordination with other support teams

- Joint Learning Activities
  - Webinars
  - 2-Day in-person meeting
References


LESSONS FROM THE IDAHO AND TEXAS COLLABORATIVES

LESSONS LEARNED: PARTICIPATION
1. Promote state-level involvement and leadership
2. Encourage cross-functional participant teams
3. Convene organizations with similar experiences and needs
4. Build on existing relationships between organizations

State Involvement & Leadership
• Reinforces the collaborative’s importance
• Provides “big picture” context for billing and revenue generation work
• Increases state program’s awareness of local needs

State Involvement & Leadership
• Facilitate communication and build buy-in
• Focus on the topic and solidify an approach
• Build and maintain momentum

Participant Characteristics
• Cross-functional teams
• Similarities between organizations
  – Structural and program similarities
  – Shared problems or desired outcomes
• Existing relationships between organizations
LESSONS LEARNED: PLANNING

1. Clarify the goals and objectives of the collaborative
2. Conduct an in-depth needs assessment
3. Adapt activities to participants’ needs and interests
4. Invest in a face-to-face meeting to jumpstart the collaborative
5. Maintain flexibility

Goals and Objectives

To help empower our health district partners by facilitating capacity building opportunities around third party billing and revenue generation

To build and strengthen peer sharing and learning opportunities across districts

In-Depth Needs Assessment

Areas to assess:
- Current billing and fee collection practices
- Experience with billing processes/systems
- Barriers and challenges to fee generation
- Strengths, successes, innovations
- Technical assistance needs

Critical for identifying common needs and unique approaches
Instrumental in setting the agenda
Benefits of online surveys and phone interviews

Adapting to Participants’ Needs

Face-to-Face Meetings

Unique opportunity to jumpstart or reenergize a collaboration (versus conference calls and webinars)
- Relationship-building
- Collective energy for improvement
- Increased sharing and deeper discussion

Flexibility

Conduct ongoing formal and informal assessments of whether activities are meeting participant needs
Be flexible both in content focus and overall structure of the collaborative
LESSONS LEARNED: STRUCTURE
1. Balance intra-agency and inter-agency collaboration
2. Include pre- and post-meeting activities
3. Emphasize action planning and next steps

Inter- and Intra-Agency Collaboration
• Structure activities to allow adequate time for participants to collaborate:
  – Internally
  – Across roles
  – As a whole group
• Examples:
  – Program staff and billing/finance staff groups each brainstorm ideas to integrate activities across the revenue cycle
  – Districts using the same EHR system meet to discuss best practices and solutions

Beyond the Meeting: Before and After
• Pre-meeting activities make the most of your meeting time
  – Orientation webinar
  – Pre-work: generate reports on current billing and reimbursement metrics and compile existing fee collection policies
• Post-meeting activities maintain momentum
  – Online Learning Community
  – Monthly or quarterly calls
  – Action Plan updates

Action Planning
• Build in time throughout the meeting for districts to reflect on lessons learned and develop action plans
• Share action plans
• Revisit plans as part of post-meeting follow up

LESSONS LEARNED: CONTENT
1. Review both billing processes as well as leadership, staff engagement and change management
2. Balance expert content and peer-to-peer discussion
3. Utilize concrete materials and current examples

INITIATING A LEARNING COLLABORATIVE IN YOUR STATE/JURISDICTION
Initiating a Learning Collaborative

• Draft goals for the collaborative
• Determine available resources
• Engage partners as needed (e.g., content experts)
  – STD-Related Reproductive Health Training and Technical Assistance Centers (project ends August 2015)
  – Capacity Building Assistance for High Impact Prevention/University of Washington Public Health Capacity Building Center

Initiating a Learning Collaborative

• Identify priority participants
• Conduct a needs assessment

Initiating a Learning Collaborative

• Develop a learning collaborative plan
  – Commit state and partner resources
  – Finalize goals for the learning collaborative
  – Outline major activities of the collaborative process
  – Determine an evaluation approach

Initiating a Learning Collaborative

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  Assessment
  Preparation for 2 Day Meeting

2 Day Meeting
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Learning Opportunities
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  Regular conference calls to learn about other projects
  Final 2 Day meeting

Questions?

Online Learning Community

Building Sustainability for Public Health Programs
www.stdhivcba.com

Community Foundation
• Shared interest in strengthening revenue management strategies and billing practices
• Open to agencies at all stages of billing implementation
• Sharing of experience, knowledge, and resources
Online Learning Community Features

- Resource Library
- Peer-to-peer discussion
- Continued / follow-up learning from training and technical assistance activities, including webinars
  - Discussion board for this webinar: www.stdhivcba.com/discussion/topics/670238

Training & Capacity Building Assistance Provider Websites

- STD-Related Reproductive Health Training & Technical Assistance Centers, by Region:
  - 1: stdtac.org/
  - 2 and 4: stdtac.caiglobal.org/
  - 3: accessmatters.org/
  - 5: hceed.info/our-projects/stp-prevention/
  - 7 and 8: shrptta.jsi.com/
  - 6, 9 and 10: cardeaservices.org/ourwork/projects/stdrhttac

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