

Brightree Connect

Configuration Guide Resupply



### Introduction

Thank you for selecting Brightree®. We are very excited about our Brightree® Connect Solution and about our partnership.

This document is your reference source to Brightree® Connect and a guide to walk you through the settings to activate Connect. The sections have been arranged in the order of completion and we have included a high-level overview of the Connect Workflow to provide the big picture.

Additionally, in certain areas we have included our recommendations in Best Practices and Notes for system settings, the list of key milestones, and the telephone script that is used to contact your patients.

This Configuration Guide does not cover core Brightree® system functionality. It does contain thorough screen shots, descriptions and explanations on Connect features.

We welcome your questions, comments and suggestions to make improvements across the board. Our commitment to you and your team is an urgent sense of responsiveness and willingness to provide answers to all questions. Our goal is to complete this process with the best-in-class Brightree Connect Solutions for your organization.

Sincerely,

The Brightree® Extended Services Team

### **Contact Brightree**

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www.brightree.com



# **Table of Contents**

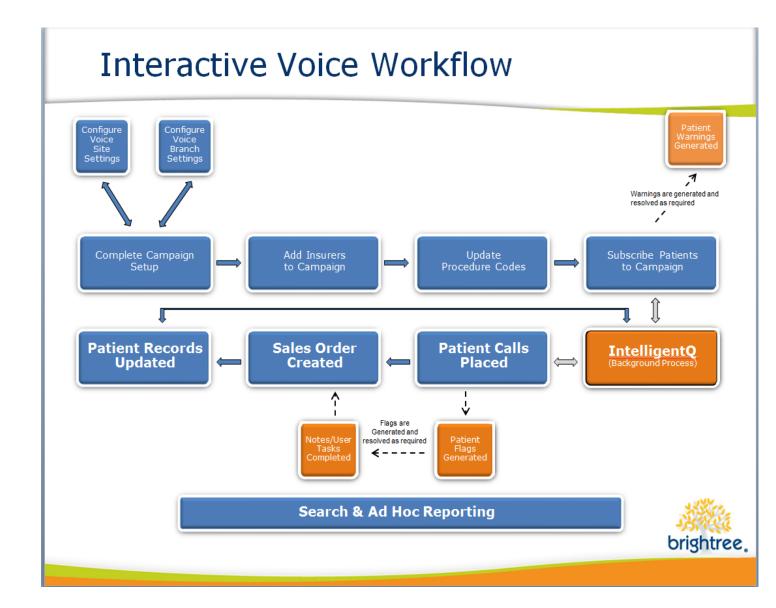
Introduction	2
Interactive Voice Workflow	5
User Permissions	6
System Setup – Site Settings	8
Portal Themes	12
Survey Setup (Portal)	14
System Setup – Branch Offices	15
Creating Campaigns	21
Adding Insurances to Campaigns	28
Campaign Procedure Code Setup	29
Editing a Procedure Code on a Campaign	29
Auto Subscribe	33
Patient Subscriptions	34
Subscribing Patients to a Campaign	35
Managing Patient Subscriptions	39
Resolving Subscription Warning Flags	40
Subscription Warning Definitions	41
Campaigns – History tab	43
Brightree Connect Sales Order Templates	44
Kitted Items and Brightree Connect	46
Excluding a Patient from a Campaign or Survey Type	50
Brightree Connect Flags	52
Flag Types Definitions	53
Flag Automation	55
Brightree Connect Notes / Task Templates	56
Creating and Managing Note/Task Templates	57
Flag Resolution Best Practice Guidelines	60
Flags Based on Survey Type:	64
IntelligentQ	65
Glossary	66
Sleep Apnea Survey Script	67
Diabetic Survey Script	68



Enteral Surve	cript6	9



### **Interactive Voice Workflow**





### **User Permissions**

Granting user permission is necessary each time a new feature or release is added to your database.

To access Brightree Connect features, user permission must be granted to all administration and staff that will be operating the system on a daily basis. Select **System Setup > User Groups** then locate the user group name that permissions will be granted, and select the **Permissions** tab.

This window opens with all areas expanded. To easily access the areas of interest, you may choose to collapse all for a better view, as shown below. The Brightree Connect permissions are located under **Ordering.** 



Select whether to grant Full control or Read Only access to the assorted areas of Brightree Connect and then save.



The following are 'Connect' related User Permission options:

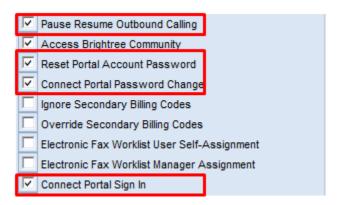
	Auto Subscribe	
	Campaign Subscriptions	
	Campaigns	
	Connect Dashboard	
	Connect Work List	
	Contact History	
	Contact Queue	
	Exclusions	
	Flags	
	Guided Call Work List	
Email/Portal Only		
	Portal Invitations	
	Portal Themes	

□ Survey Setup

It is also necessary to grant user permissions to each user group that will be responsible for controls to pause and resume outbound calling if outbound automated calling is being used. However it is only recommended that only one or two administrators are granted permission to pause and resume calls to your patients.

If enrolled in the Email / Portal feature, user permission will also be necessary to allow for Portal password and login management.

Select **System Setup > User Groups** then locate the user group name that permissions will be granted, and select the **Security** tab, scroll through the list to locate the applicable settings.

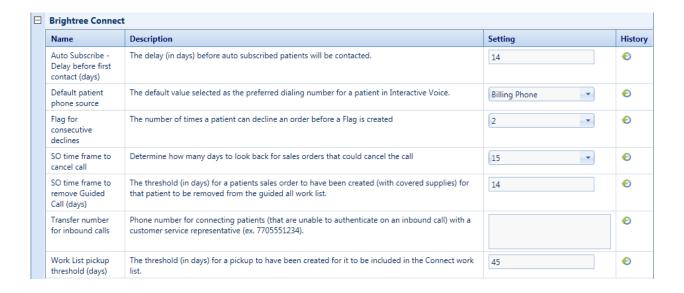




### System Setup - Site Settings

Site Settings are designed to support Brightree Connect by setting various default factors that will manage all active campaigns within your database. From the **System Setup** menu, select **Site Settings > Brightree Connect** to view core Connect settings and **Brightree Connect Portal** to view Portal settings.

### **Brightree Connect Site Settings**



#### <u>Auto Subscribe – Delay before first contact (days)</u>

This setting allows you to select the number of days to delay the first contact to the patient from the time they were subscribed to a campaign using the Auto Subscribe feature. This delay provides time to ensure patient compliance and SO Template completion.

#### **Default patient phone source**

This setting allows you to select which patient telephone number is called during a campaign. There are three choices: **Billing, Mobile, or Delivery Phone**.

These phone numbers must be present in the patient record, and the default value selected should match the phone number where the patient is available during the calling time.

#### **NOTE:**

The site setting is the system default but may be overridden at the patient level



#### Flag for consecutive declines

This setting directs the system to create a flag after the patient has declined to place an order based on the selected number of times. You can choose between 2 and 5 times for consecutive declined orders before a flag is generated. The patient is still considered active and will be called according to the campaign schedule, but the flag serves as a reminder that manual follow-up should be conducted.

Patients declining orders repeatedly may indicate they are not complying with their therapy. Manual follow-up is recommended.

The number of times you choose should reflect the frequency of the calling campaign. If you call every three months, waiting for 5 consecutive declines may be too long; you may have lost that patient to another provider or they may be non-compliant with the therapy.

### Sales Order time frame to cancel call

This setting allows you to control the window between the "patient's called in order" and when Brightree Connect schedules its next call to the patient. It is used to prevent the system from calling the patient shortly after the patient has purchased covered supplies.

You may encounter a scenario where the patient has called or has come in and ordered supplies shortly before they are scheduled to be called by Brightree Connect. This setting will tell the system, prior to making calls how many days to look back for sales orders that contain procedure codes that are listed on the patient's Connect template. If sales orders are matched within the selected timeframe, the system will consider this contact cycle complete and schedule the patient for the next calling interval specified by the campaign. A well-trained customer service representative would check the record, see if the patient has other items that are due, and offer those other supplies during the patient's visit or call.

This time frame has a maximum of 30 days for Sales Order history search.

#### Sales Order time frame to remove Guided Call (days)

This setting allows you to remove a patient from the Guided Call Work List if a sales order for covered supplies is found in the patient's sales order history within the specified days designated. This setting helps to eliminate users from calling patients who have just purchased supplies. Best Practice and system default is 14 days.

### **Transfer number for inbound calls**

The number represents the internal phone line that calls will transfer to if the patient is unsuccessful in authenticating their identity during an inbound call attempt.

Desired number must be in the format "6782431800"



#### Work List pickup threshold (days)

This setting allows you to indicate how far back in sales order history Connect will search to identify the pickup of a CPAP device. If the recorded pickup is within the threshold limit, the patient will appear in the Connect Work List as an alert. Once the limit days are past, the patient will be removed from the work list. Best Practice and system default is 45 days.

### **Brightree Connect Portal Site Settings**



#### **Max Portal Invitations Sent**

This setting defines the maximum number of times an individual patient can be included as part of a mass email invitation group.

#### Site Default Contact Us Email

This setting defines the default company contact email address to display on the 'Contact Us' page of the web portal. This setting can be overridden at the branch level.

#### Site Default Contact Us Phone



This setting defines the default company contact phone number to display on the 'Contact Us' page of the web portal. This setting can be overridden at the branch level.

### Account Lockout Time (minutes)

This setting defines the number of minutes to lock a patient's portal account for security reasons. After the selected minutes have passed, login availability will resume. If the selected setting is 0, the patient's account will remain locked until released by a Brightree user with this permission.

### **Maximum Failed Password Attempts**

This setting defines the maximum number of login attempts before the patient is locked out of the portal.

#### **Maximum Security Question Attempts**

This setting defines the maximum number of consecutive attempts to answer a patient defined security question before the patient is locked out of the portal.

### **Minimum Password Length**

This setting defines the minimum number of characters to be required for a portal password.

### **Minimum Password Special Characters**

This setting defines the minimum number of special characters (#, \$, -, %, etc.) to be required as part of a portal password.

#### Password Reset Expiration (hours)

This setting defines the number of hours a portal password reset link is available. If not accessed in this time frame, a new password reset will be required.

#### **Registration Expiration (hours)**

This setting defines the number of hours a portal registration email link is valid. If not accessed in this time frame, a new registration link will need to be sent to the patient.

#### **NOTE:**

If a patient's portal invitation registration link is active at the time of subsequent mass invitations, the patient will not be included in the mass invitation.

### <u>User Session Timeout (minutes) (valid minutes: 20 – 120)</u>

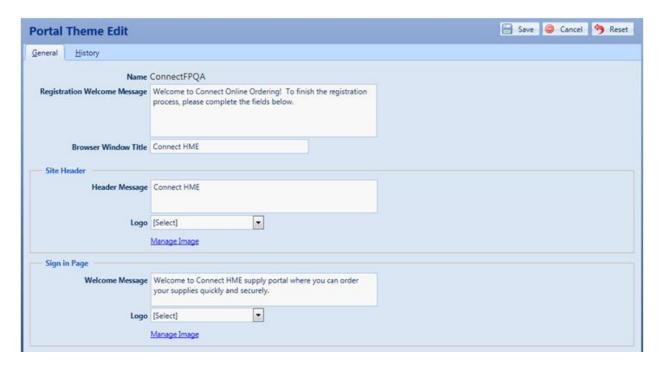
This setting defines the number of minutes before the patient portal session will timeout with no activity.



#### **Portal Themes**

Portal Themes are designed to support providers who engage with patients under multiple brands. For example, one Brightree site may contain branches for ABC Medical and ACME Homecare, which have distinct business names and logos when interacting with patients. Portal Themes allow for maintaining multiple patient-facing brands, similar to the survey script recording Voice Group.

Go to Ordering > Connect > Portal Themes to view the customizable theme settings.



- Registration Welcome Message: This message appears on the first page a patient visits in the portal registration process.
- **Browser Window Title**: This title is used to set the name of the internet browser window and should generally match the name of the provider (e.g., ACME Homecare).
- Site Header (Header Message / Logo): This represents the smaller logo which appears
  in the site header throughout the portal. NOTE: The Header Message will only appear
  on the site if no Logo is uploaded.
- **Sign in Page (Welcome Message)**: This message appears on the Sign In page below the 'Sign in Page' logo when patients visit the portal.
- **Sign in Page (Logo)**: This represents the larger logo which is displayed on the sign in page when patients visit the portal.



The manage Image link will allow you to upload logos you wish to be viewed on the portal pages. Choose an image type and click new. Upload your logo and save. Images can be in PNG, JPG or GIF file format no larger than 100KB.



You may personalize any branch that requires a theme different from the default.

### **NOTE:**

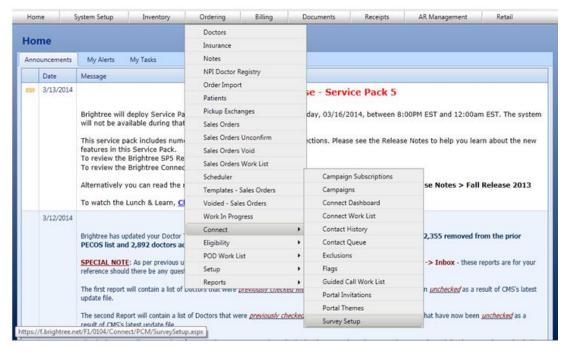
A logo cannot be deleted if in use on any of the branch portal themes

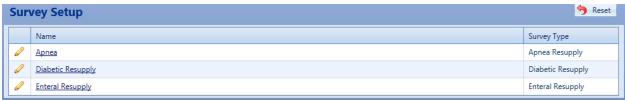


### **Survey Setup (Portal)**

The Portal Survey setup feature provides the ability to re-name the Connect default survey name to a name your patient may better understand for your business area. The survey name defaults to 'Apnea', 'Diabetic Resupply' and 'Enteral Resupply'.

Go to Ordering > Connect > Survey Setup to view the customizable setting.





If a survey name has been changed, it will appear in the Campaign Manager, Guided Call, and Portal website Order.



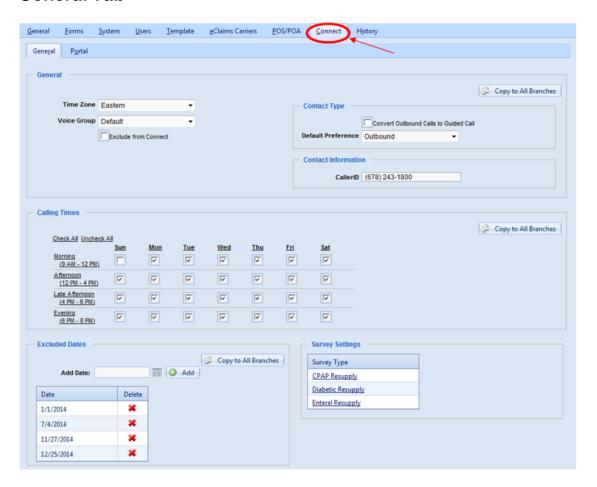
### **System Setup – Branch Offices**

Configuration of Brightree Interactive Voice requires settings at the branch level.

Go to System Setup > Branch Offices > Select Branch > Connect tab.

You should complete these settings before creating Campaigns.

#### **General Tab**



### **General**

- Time Zone: Enter the default time zone for all the patients at that branch. This setting
  can be overridden at the individual patient level. Select the appropriate zone from the
  drop down list.
- Voice Group: Select Default from the drop down list. This can be changed if multiple branches require specified survey calling scripts.
- Exclude from Connect: Allows you to exclude this branch from the Brightree Connect Program. If selected, all patients tied to this branch will be disqualified from participating in Brightree Connect.



### **Contact Type**

- Convert Outbound Calls to Guided Call: Allows you to override all patient preferences
  for Outbound calls and load the patients in the Guided Call Work List when eligible for
  resupply.
- **Default Preference:** Select a default contact preference for the branch of either 'Outbound', 'Guided Call' or 'Email (if enrolled in Email/Portal option).

### **Contact Information**

Caller ID: Enter the area code and telephone number that you want displayed to your
patients when they receive a telephone call from Brightree Connect. This number
should be one that your patients recognize and/or dial to reach a service representative.

To copy General information to all other Connect branches; click the **Copy to All Branches** button. If a specific branch will have different General information, you may alter it by branch as desired after the copy process.

### **Calling Times**

Select the default days of the week and the times of the day for the system to contact your patients for the highest connection rate. You may use the hyperlinks to auto check all or uncheck all, select individually by day or by time slot. The dialing times used to contact a patient will also be limited by campaign settings, so the branch dialing times should be the widest possible range. If you will have some campaigns which will call during the day and others which will call during the evening, you must select BOTH dialing times on the branch office.

To copy selected calling times to all other Connect branches; click the **Copy to All Branches** button. If a specific branch will have different calling times, you may alter it by branch as desired after the copy process.

### **Excluded Dates**

Allows you to insert specific dates throughout the calendar year for which patients should not be contacted by the system. For example, you may not want to call your customers on holidays or on days when the branch is closed. You may use the calendar pop-up icon next to the date field to choose your date or just key in the date using mm/dd/yy format.

To copy blackout dates to all other Connect branches; click the **Copy to All Branches** button. A pop-up box will appear to confirm the copy request. Check the 'Remove dates not on this branch' box if you want to remove all dates not listed on the current branch from the 'Copy to' branches. If a specific branch will have different exclude dates, you may alter it by branch as desired after the copy process.

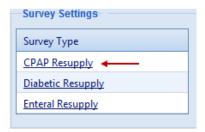




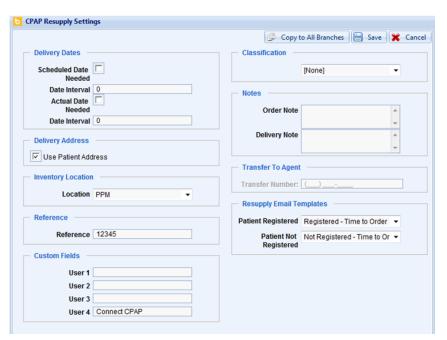
### **Survey Settings**

The 'Survey Settings' identifies the active survey types on your database and allows you to set Sales Order template default values for the chosen survey type.

To enter default value information, click on the Survey Type (CPAP Resupply, Diabetic Resupply, or Enteral Resupply).



Note: Any information applied to these default fields will affect all templates and subsequent Sales Orders created by Connect under this resupply type after default settings are saved. Therefore, it is imperative to complete these default settings prior to subscribing patients to any campaigns.





- Scheduled Delivery Date and/or Actual Delivery Date: Select this option to if using the
  date created as the scheduled date or if you know that you will be delivering items to the
  patient within a given amount of time. If you are using a fulfillment center for your supply
  delivery, best practice is to leave the boxes un-checked to ensure no date will populate at
  the time the sales order is created.
- Use Patient Address: Check this box to ensure the system will always use the latest address on the patient record for sales orders created. This ensures staff will not have to update the patient's address on the Connect template, as well as the patient record.
- Inventory Location: The inventory location that the system uses when a new Sales Order is created using a Connect template.
- Reference: This is a free form text field and is searchable for Sales Orders and Sales
  Order templates. (If using VGM or PPM for fulfillment needs; enter member or account
  number here)
- **Custom Fields:** You may want to use one of the User fields to identify all Connect generated templates. This will be very useful for reporting purposes and order identification.

#### 8 Best Practice

If utilizing multiple survey types, add the type here. i.e.: CPAP, Diabetic, Enteral.

- Classification: Select your preferred choice from the drop down list.
- Order Note: You may enter generic text to appear on every Sales Order generated from a Connect template.
- **Delivery Note:** You may enter generic text to appear on every Delivery ticket generated from a Connect template.

**Note**: this field will override any delivery note placed on the patient's account.

- Transfer to Agent: The represents the local or toll free number within your facility that you
  would like for the automated call to be transferred to if the patient elects to transfer out of the
  automated call.
- Save Save your settings.

NOTE: The above steps must be completed for each branch office that will have patients subscribed to Connect.

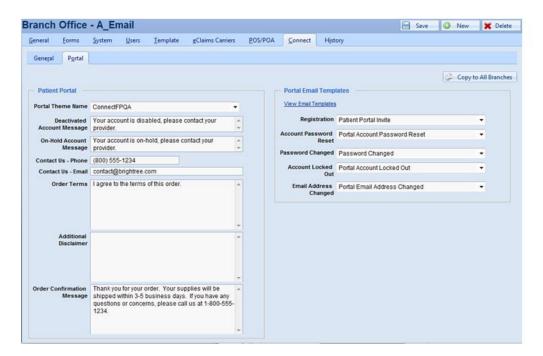
#### **Resupply Email Templates:**



These settings appear if enrolled in Email/Portal and define the patient email contact message when patient is eligible for resupply. Each email template is customizable by supply type.

To copy resupply settings to all other Connect branches; click the **Copy to All Branches** button. If a specific branch will have different settings, you may alter it by branch as desired after the copy process.

### **Portal Tab**



### **Patient Portal**

Portal Theme Name: The alias name to uniquely define your portal website URL.
 Select from drop down list for previously set aliases.

Example: ABCDME1

- Deactivated Account Message: The message your patients will see when trying to
  access the portal if the patient's portal account has been deactivated. This should
  generally include contact information to request help getting the account reactivated.
- On Hold Account Message: The message your patients will see if their Brightree
  patient account is on hold.
- Contact Us (Phone & Email): The applicable contact information you want displayed on the portal "Contact Us" page.



- Order Terms & Additional Disclaimer: Use this area to provide additional information
  requiring patient agreement prior to completing their portal resupply order. This could
  include insurance language used on delivery tickets, a note that a co-pay or insurance
  confirmation is required or any other disclaimer/note you want the patient to
  acknowledge before placing an order. If left blank, the acceptance requirement will not
  display.
- Order Confirmation Message: The message your patients will see after submitting an order in the portal. Best Practice is to include information such as the shipping time frame.

<u>Portal Email Templates</u>: Email templates are added per branch giving you the ability to have a different branch specific message, if desired. These email templates are used when contacting a patient for ordering and can be customized by supply type. To view the branch email templates, click <u>View Email Templates</u> hyperlink.

To copy Portal settings to all other Connect branches; click the **Copy to All Branches** button. If a specific branch will have different settings, you may alter it by branch as desired after the copy process.

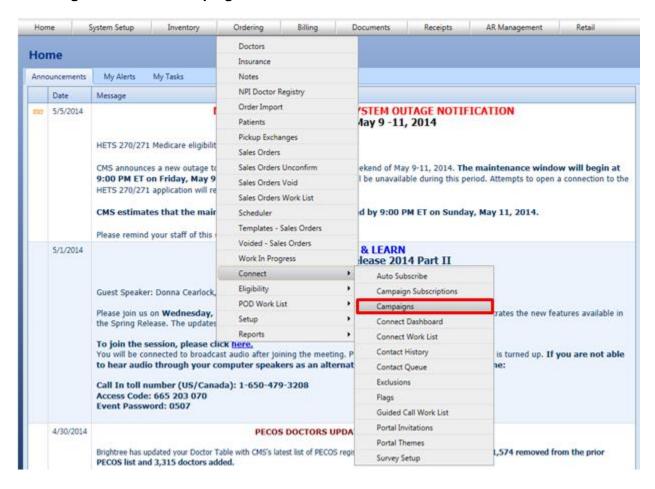
#### **NOTE:**

All Portal Email templates will be created during implementation by your Implementation consultant. Once saved, email templates can only be changed by contacting Brightree support.



### **Creating Campaigns**

A campaign is a structured plan to contact a patient with a desired outcome. One of the first steps in configuring Brightree Connect is defining the campaign(s) details. It includes all of the settings to determine which patients to call, when, and how frequently, as well as the Insurance providers associated with the campaign. You will find the **Campaigns setup** page by selecting **Ordering > Connect > Campaigns**.

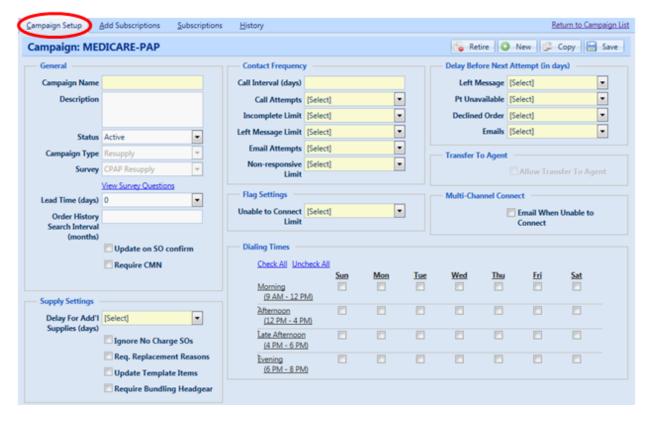


To create a new Campaign, select the 'New Campaign' button.



Each campaign has unique settings depending on the Insurance Company's reimbursement schedule.





### <u>General</u>

- Campaign Name: Enter the name of your campaign based on the type and perhaps
  insurance provider, e.g., BCBS of GA, or Medicare, etc. to assist in ease of recognition
  from the campaign list. If you are using multiple surveys (e.g., Diabetic and Apnea), it
  may be helpful to add each survey type to end of the Campaign name, like 'Medicare CPAP'.
- Description: Enter a detailed description for the campaign, e.g., "BCBS of GA Resupply-Program - run every 90 days" The description is for internal purposes only.
- Status: The Campaign may be "New", "Active", or "Inactive". This field will stay in the
  "New" status until the campaign is activated. NOTE: Do not activate until day before GoLive.
- Campaign Type: Select "Resupply" from the drop down list.
- **Survey:** Choose the correct survey for the campaign from the dropdown list. This field determines the procedure codes associated with the campaign.

#### **NOTE:**

Click on the View Survey Questions to see sample of survey questions



- **Lead Time (days):** Choose the number of days prior to the re-order date that Connect will make a call to the patient. Be sure to allow ample time to make contact with the patient and ship the ordered items prior to patient running out of supplies. (**Note**: *This field is not typically used for Apnea/CPAP supplies*)
- Order History Search Intervals (months): Choose the number of months to have the
  IntelligentQ look back into patient's order history to see if they have qualifying sales
  order history that contains any or all of the procedure codes listed on the campaign.
  Also, when building the Sales Order Template for patients you subscribe, Connect will
  look at a patient's ENTIRE order history to find matching supplies.
- Update on SO Confirm: If checked, when a Sales Order is confirmed the next available
  date is recalculated and pushed out based on the invoice service date rather than the
  date that the Sales Order was created.
- Copy Payor Level Includes: allows users to build templates with the secondary payer as the primary payer. For example, if Medicare is the primary and Medicaid is the secondary, and the primary Medicare does not pay, then the secondary, Medicaid will be billed as the primary when this new setting is enabled.
- Require CMN: For those patients that require a current CMN prior to resupply, checking
  this box will direct the system to complete an active CMN validation check. If one or
  more items on the Connect Sales Order Template do not have an active CMN, Connect
  will not contact the patient for any items. The patient will be added to the Subscription
  Exclusion list.

### **Supply Settings**

- Delay for Additional Supplies (days): Number of days to postpone calls to capture
  additional orders. For example: you have a patient due to be called on May 31<sup>st</sup> for a
  mask, tubing, and filters but is scheduled for a headgear on June 12<sup>th</sup>, you may want to
  push that call out to capture all of the supplies during one contact. Select between zero
  (0) and 15 days from the drop down list.
- Ignore No Charge SOs: If checked, Connect will ignore any procedure code without a charge when searching history to determine next available date. Thus leaving the Next Available Date on the SO Template as the last billed date for that item. For example, if you sold a patient a mask on 1/31 and then swapped the mask out on 2/20, which generated a sales order with \$0.00 charge amount, Connect will use 1/31 as the last order date for determining when the patient is next eligible for the mask.
- Req. Replacement Reasons: (CPAP Resupply) When checked, the replacement reasons column will become visible in the procedure code section of the campaign allowing you to add resupply reasons to the campaign and calling script for each individual procedure code.



Update Template Items: When selected, nightly services will review confirmed sales
orders consisting of CPAP procedure codes. If any procedure codes are identified as
being different or not listed on the patients Connect Sales Order Template, the new items
will be swapped, ensuring your patients receive the most recent supplied items when
ordered.

NOTE: If you are currently using the "Ignore No Charge SOs", Connect will not update a "no charge" item to the template with the new item.

NOTE: If you uncheck the "Ignore No Charge SOs" box, Connect will update the item as well as the next available date for when the patient is eligible to receive a new one.

 Require Bundling Headgear: In the event you supply a headgear with every mask provided, this campaign setting prevents the patient from being offered a headgear. An A7035 (headgear) will appear on the sales order ONLY if the patient is eligible for the headgear.

Contact history detail will never show the A7035 as a requested supply as it was never offered.

**NOTE:** It is not recommended you activate this feature on any campaign requiring replacement reasons as the patient is never offered the A7035 so a replacement reason is not required.

**NOTE:** If you are using the kit substitution feature in Brightree, this is not a recommended feature.

### **Contact Frequency**

- Call Intervals (days): The interval (in days) between campaign runs that your patient is
  contacted for resupply orders. When a patient accepts an order, or when Connect has
  reached the "Call Attempts" setting for a patient, the system will not try again for this
  number of days.
- Call Attempts: Choose how many call attempts should be made before the system stops trying to contact the patient and places them back into the queue for the next calling rotation. Your choices are between three and five.
- Incomplete Limit: Limits the amount of "incomplete" (hang up) calls received from Connect before the system will reschedule the patient's next contact according to the "Call Interval" (e.g., stop calling the patient for 90 days). This field will override the "Call Attempts" and should be equal to or less than the "Call Attempts". If this setting is greater than the Call Attempts setting, it will not be applied.



**NOTE:** If you do not want a flag created after this first run, set the "Unable to Connect Limit" to 2.

• Left Message Limit: Limits the number of times Connect will leave a message for a single patient during a campaign run. Designed to prevent too many voicemails from being left for the patient in a short period of time. Once this number of messages has been left for a patient, the system will reschedule the patient's next contact according to the "Call Interval." This field will override the "Call Attempts" and should be equal to or less than the "Call Attempts". If this setting is greater than the Call Attempts setting, it will not be applied.

**NOTE**: If you do not want a flag created after this first run, set the "Unable to Connect Limit" to 2.

- Email Attempts (Email/Portal Only): Choose how many call attempts should be made before the system stops trying to contact the patient and places them back into the queue for the next calling rotation. Your choices are between one and five. If this setting is greater than the Call Attempts setting, it will not be applied.
- Non-responsive Limit: Limits the amount of "Non-responsive" calls received from
  Connect before the system will reschedule the patient's next contact according to the
  "Call Interval" (e.g., stop calling the patient for 90 days). This field will override the "Call
  Attempts" and should be equal to or less than the "Call Attempts". If this setting is greater
  than the Call Attempts setting, it will not be applied.

### Flag Settings

• Unable to Connect Limit: Determines how many campaign runs to go through before creating a flag for the "Unable to Connect" call result. For example, with an Unable to Connect Limit of 2, if a patient is called 3 times in March without successfully connecting and the "Minimum Call Interval" is set to 90 days, Connect will reschedule the patient's next contact for June without creating any flags. If the system is unable to connect with the patient after 3 attempts, an "Unable to Connect" flag is generated. If the Unable to Connect Limit had been set to 1, a flag would have been generated in March after the 3<sup>rd</sup> failed attempt.

### **Delay Before Next Attempt (in days)**

• Left Message: If Connect reaches an answering machine, it will leave a message. Use the drop down to select the number of days between attempts to contact the patient when Connect reaches an answering machine. You can select between 1 and 10 days.

#### **8 Best Practice:**

Setting the delay between calls to 4 or 5 days will allow time for the customer to contact you or call into the toll free 24 hour inbound calling line to create a Sales Order for the items needed. The IntelligentQ will them remove the patient from the active call list and return them to the next call cycle in the campaign.



• **Pt. Unavailable:** If the patient is not available at the time of the Connect call, we capture that information and return them to the call queue. You can select between one and three days to delay before we call the patient again.

#### **8** Best Practice:

Recommend keeping this window short; start with one day.

- Declined Order: At times, a patient may not need supplies and declines the opportunity to place a re-order. You can select 14, 30, 60 or 90 days before calling again. This field will override the "Call Interval (days)" setting.
- Emails (Email/Portal Only): Choose the number of days between email attempts to contact the patient. You can select between two and seven days.

### **Transfer to Agent**

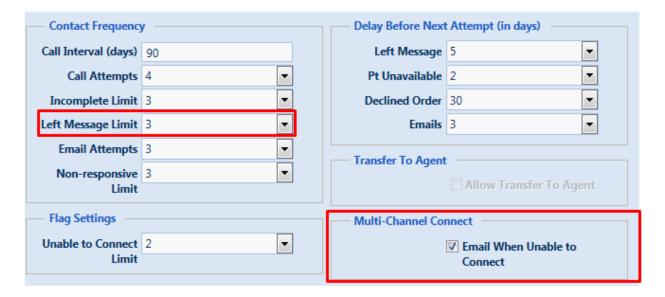
Allow Transfer to Agent: Checking this box will allow your patients during specific points
of the automated call to transfer to a designated person within the company to handle
direct patient concerns generated during the call. Transfer to agent is campaign specific
and must be maintained at this level. This setting must be made available either by your
implementation consultant or Brightree Support.

### **Multi-Channel Connect: Check this option**

The Multi-Channel Connect setting, 'Email When Unable to Connect," will send an email to a patient when a contact cycle ends without a complete call result. In the example shown below, the Left Message Limit for the campaign is set to three. After calling the patient and leaving three voicemails, Connect will send the patient an email. If the patient does not have an email address or the email address on record is not in the correct format (e.g., johndoe@email.com), no email will be delivered.

If you would like for your patients to receive email contact, you must click the Multi-Channel Connect box on the screen shot, enter the email attempts and enter the number in days you wish for Connect to wait before we send the next email.





### **Dialing Times**

 You are able to select the days and times to call patients subscribed to each respective campaign. Dialing times determine the range of hours during which Connect can contact the patient. These times are defined at the branch and specified at the campaign level.

Time slots selected at the campaign level *must also be* enabled at the Branch level in order for patients subscribed to the campaign to receive calls during the desired timeframe. For all time slots not selected at the Branch level, Connect will not make a call even if time slot is checked in the Campaign.

When successful connection is made with a patient, Connect analytics remembers the day and time of the connection and uses the time selection again when attempting to connect with that patient in the future.

#### **8 Best Practice:**

Consider religious affiliations and Sunday services when choosing the appropriate times to call. Remember that leaving a message on an answering machine counts as a call attempt, and so while choosing all of the dialing times may seem appealing, it's generally not a good practice.

#### **NOTE:**

If you have set your Call Attempts to 3 and have 4 calling times selected; Connect will never get the opportunity to attempt the 4<sup>th</sup> calling time on that day. Make sure to not select more calling times during a single day that exceeds your Call Attempts.

Once the Campaign Setup is complete – click SAVE



### **Adding Insurances to Campaigns**

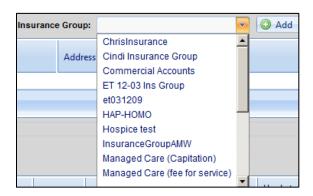
The selection of insurance providers is one of the key details that determine how many campaigns you create. An insurance provider can be selected individually or as part of a group, and then added to the campaign.

There are no limits to the number of insurance providers that can be added to a single campaign and a single insurance can be added to more than one campaign. However, a patient cannot be added to more than one campaign per survey.



From the Campaign Setup, you can select the **Insurance Name** or **ID** from the pre-populated drop down list or simply begin typing the name or ID which will filter the available list and allow you to select the insurance.

**OR** 



You have the option to add Insurance **Group** to a campaign which will populate all associated insurances to the campaign.

A report can be run to determine if all payors are in a specified insurance group.



### **Campaign Procedure Code Setup**

The Brightree Connect system is pre-loaded with **Procedure Codes** which are tied to the survey. You have the ability to customize each campaign by **removing** " \* " a Procedure Code from a Campaign based on patient/insurer supply requirements. You can also add a previously removed Procedure Code back to the campaign by selecting from the Survey Proc Code drop down list and clicking the **add** Add button.

You may not add any additional codes to the Resupply Campaign.

#### **NOTE:**

If you are building a new campaign by copying another campaign and you need to add back any of the codes removed, use the "**Survey Proc Code**" drop down list to select the codes available to be re-added.

### **Editing a Procedure Code on a Campaign**

Procedure Codes fields are editable, allowing you to make sure that the right supply is asked for during the call and that the combination of supplies ordered is cost-effective.



To expand the procedure section for editing select the "Edit All" button, then make all necessary selections and select "Save All".





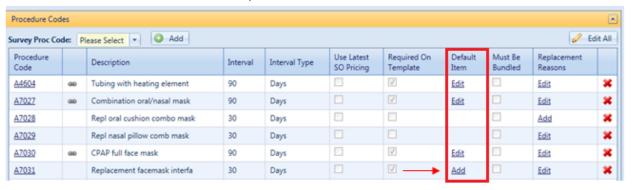
### **Procedure Codes Column Definitions**

- **Procedure Code:** Standard Procedure codes as defined by the Survey Type (Apnea, Diabetic, Enteral) that default to the campaign.
- **Linked Items:** Connect has linked similar procedure code items so that when the IntelligentQ is searching the SO history and it locates more than one of these linked items, it will pull the most recently purchased one onto the SO Template.
- Description: Procedure code description as defined in the Brightree system
- Interval and Interval Type: designates the frequency a supply is allowed to be included
  in the campaign script. This interval frequency is most commonly determined by the
  payors reimbursement guidelines.
- Use Latest SO Pricing: For items setup with multiple price options in price table, this
  setting will cause Connect to override the default price option for an item, instead
  selecting the price option used on the most recent sales order for the patient. Manual
  changes made to a template will always be applied to new sales orders created from the
  template. (Note: Special pricing and price overrides are NEVER copied to Connect
  Sales Order Templates. This setting will only ensure that the correct price option is
  selected, based on the patients most recent sales order for the item).

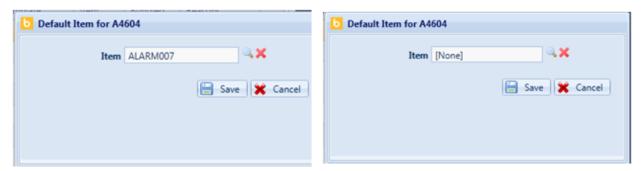


Required On Template: This checkbox prompts the Brightree user to add a supply to
the Sales Order Template that may not have been ordered previously. For example, a
new patient may not have ordered their initial supplies from you so these items are not
found in sales order history.

To auto populate a default item to the patient's Sales Order Template not found in the patient's sales order history, select the desired procedure code then click the "Save All" button. An **Add** hyperlink will appear in the **Default Item** column for the selected procedure code(s). Click the **Add** hyperlink, the Default item search window will appear. Search, select and "Save" a default replacement item.



If an item is not choosen, no item will be added to the template. However, a warning flag will be displayed on the patient subscription.



#### **NOTE:**

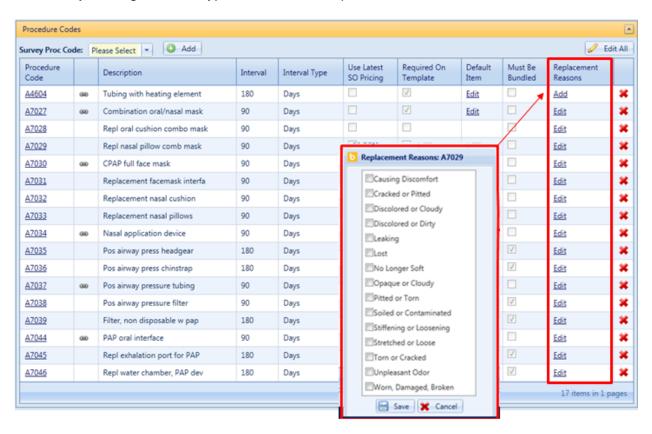
Item linking will continue to function as it does currently. Only one mask or tubing will be added to a sales order template. The same default item will be attached to the same linked items.

• Must Be Bundled: This setting designates the item can only be sold when bundled with other items. For example, you may not want to allow filters to be sold and shipped separately due to the low re-imbursement margin. The automated survey script will not offer items which are flagged as must be bundled unless one or more items NOT marked as "Must Be Bundled" has been offered and accepted. Once a patient accepts any of the "non-bundled" items, they will be offered all the bundled items.



Replacement Reasons: Replacement reasons through Brightree Connect were
designed in an effort to assist the provider of CPAP supplies stay in compliance with
Medicare guidelines for documentation of resupply reasons. Replacement reasons may
be utilized on any campaign. Brightree does not require that you utilize the replacement
reasons on a campaign. Adding or not adding replacement reasons to a campaign are at
the discretion of the provider.

To attach replacement reasons, select the particular code that you wish to apply replacement reasons by clicking the **Add** hyperlink under the replacement reason column.



From the pop-up you may select up to three (3) reasons to be asked during the call regarding that procedure code.

For every procedure code that a replacement reason is attached, Brightree will add an additional replacement reason of "Other" to be asked during the call. This is designed to assist you in gathering information on all other experiences that the patient may be having outside of those option provided during the call. (Not applicable for Guided Call patients)

#### **NOTE:**

Keep in mind; the current automated call length without replacement reasons is approximately 2 minutes. The more replacement reasons added to each code the longer the call will be for the patient.



#### **Auto Subscribe**

Connect can auto subscribe your patients to a campaign, to help minimize the manual workflow. Complete the set up steps per campaign. The same functionality exists as when you mass subscribe from the campaign.

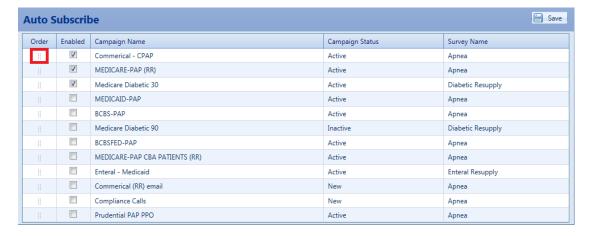
User Permission required



Site Setting: Auto Subscribe - Delay before first contact (days) - used to delay the first contact to insure compliance before the patient is contacted. Delay date (0-30 day option)



**Go to Ordering > Connect > Auto Subscribe**, view the Campaign list; check the 'Enabled' box of active campaigns to be included. From the order column, drag and drop enabled campaigns in order of priority to auto subscribe. This allows for patients to be subscribed to a preferred campaign if the same insurances are listed on multiple campaigns.



Campaigns selected in the Auto Subscribe page will get checked by nightly services to see who should be subscribed to a campaign based on the procedure code intervals. The Connect Sales Order Template is created based on these same intervals to include the site setting "Auto Subscribe - Delay before first contact (days)", if applicable.

Ad-Hoc reporting (**Connect Portal Account**) can be used to determine the patients subscribed via auto subscribe.

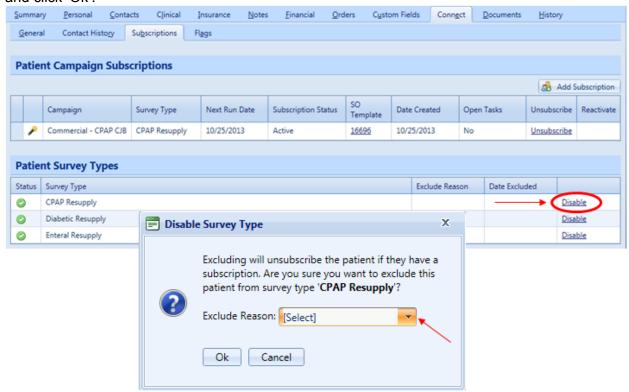
Patients subscribed via Auto-Subscribe will display as 'Created by' Connect, Brightree.



### **Patient Subscriptions**

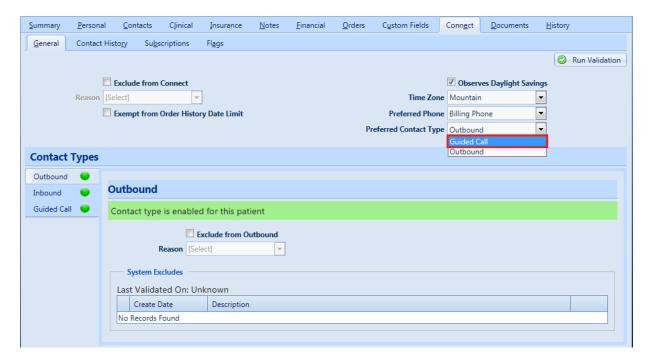
Prior to subscribing patients to a campaign, you will need to make sure any patients that no longer need resupply (i.e.: had CPAP picked up) have been disabled from Connect. Best practice is to run a report of all resupply type associated patients to determine who has had their equipment picked up.

- Open patient account and click on the "Connect" tab. DO NOT CHECK THE EXCLUDE FROM CONNECT box on the General tab.
- 2. If the patient had equipment picked up due to not using, click on the "Subscription" tab and click 'Disable' for the correct resupply type, select an 'Exclude Reason' from the drop down list and click 'Ok'.



3. If the patient has equipment but does not want to use the automated system and you will be calling the patient, select the 'Guided Call' option from the "Preferred Contact Type" drop down list.





### **Subscribing Patients to a Campaign**

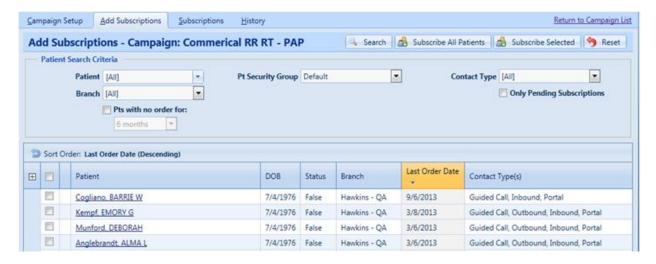
The "Add Subscriptions" tab is used to search and subscribe new patients to the Campaign.



You may search by Patient, Branch, Pt Security Group or Contact Type; however for initial campaign set up search by "All".

**Click Search Button:** This may take a couple of minutes as the IntelligentQ searches through your database to identify all appropriate patients based on the campaign's designated *primary* insurances and patient's resupply sales order history.





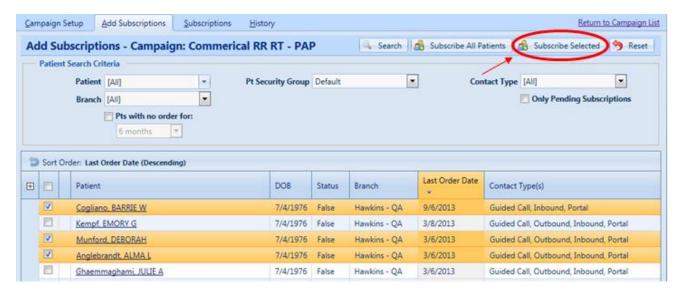
Results may be sorted by clicking on the various column headings (i.e. Patient, DOB, Branch, and Last Order Date).

NOTE: If a patient account is currently on 'Hold', their name will not appear in a subscription search.

To select the patients to be subscribed to the Campaign, you may select all of the patients on the page at one time by using the checkbox next to the Patient column heading or select each patient individually.



After completing the patient selection process, select the "Subscribe Selected" button.

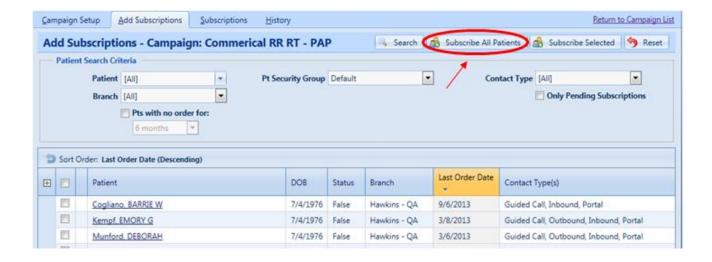




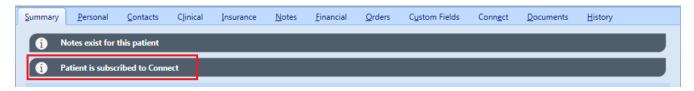
#### **NOTE:**

If you have multiple pages of patients to subscribe, you will need to select and subscribe each page separately or select to bulk subscribe all patients as outlined below.

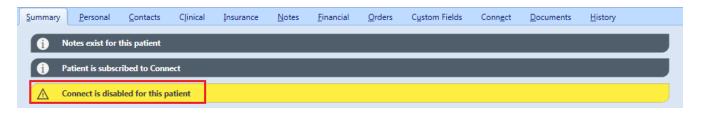
Bulk subscriptions will allow you the flexibility to add all eligible patients to the selected campaign, eliminating the need to navigate page by page to subscribe eligible patients.



Once a patient is subscribed to a Connect Campaign, they are easily identified on the 'Summary' tab of the patient's account by a banner labeled "Patient is subscribed to Connect"



If the patient is subscribed and globally excluded, a second banner will appear.

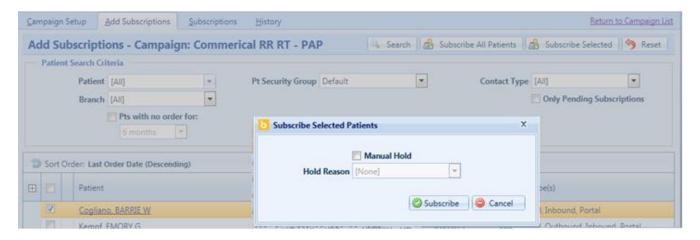




### **Manual Hold for Sales Order Templates**

With both the "Subscribe All Patients" and the "Subscribe Selected" buttons you will receive a pop up giving you the option to place your selected group of patient SO templates on a Manual Hold. This will allow time to review each patient's template to identify the need for inventory item adjustments, ensuring that the patient is getting all of the supplies that they need.

Before using this option, set up or add an additional Manual Hold reason signifying that the Sales Order template hold is for Connect.



After making all of the necessary template adjustments, remove the hold to allow the IntelligentQ to queue the patient for calls when eligible. Templates on hold may be located in the Connect Work List or by running an Ad-Hoc report to locate the hold reason.

To locate eligible patients who have not ordered supplies within 6 -18 months or to help target payors who will not pay for supplies until the patient has utilized their equipment for a specific amount of time, check the **Pts with no order for** box and select the desired number of months from the drop down list.



FUTURE PATIENT SUBSCRIPTIONS CAN BE COMPLETED THROUGH THE PATIENT'S ACCOUNT.

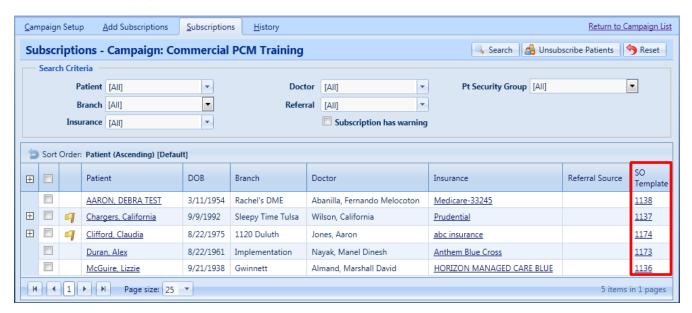


### **Managing Patient Subscriptions**

Once you have subscribed patients to the campaign you can manage or search the list. The "Subscriptions" tab is used to search and view patients and their associated Sales Order Template subscribed to a Campaign. You can filter the search by using any combination of the following criteria:

- Patient (Name/ID)
- Branch
- Insurance (Name/ID)
- Doctor (Name/ID)
- Referral
- Subscription has warning
- Pt Security Group

Once you have chosen your search criteria, click the **Search** button at the top right of the page and the patient list will populate.



Each patient subscribed now has their own individual Sales Order template that can be edited and reviewed by clicking on the Sales Order Template number within the **SO Template** column.

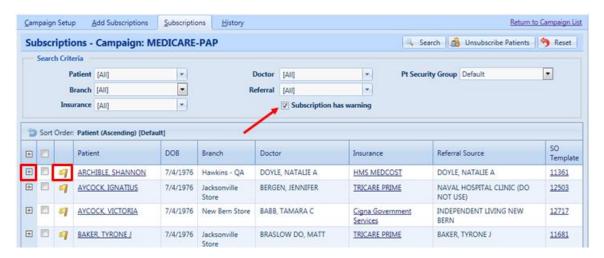


### **Resolving Subscription Warning Flags**

Warning flags will appear to alert you of any action needed from you.

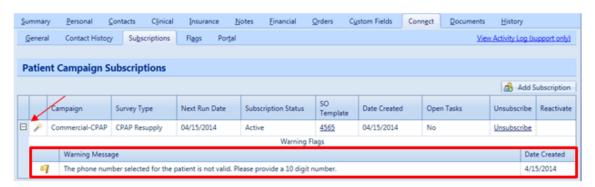


To review only those subscriptions that generate with warnings/exceptions, check the search criteria box "**Subscription has warning**" and click the **Search** button.



If warnings exist for a patient, click on the plus "+" sign to the left of each patient's name to expand the flag and display the warning message.

When subscribing the patient from within their patient account, subscription warnings may be viewed and updated with ease of access to the Sales Order template.



Though not required, resolving the system generated flags prior to Connect making a call to the patient will result in more correct information being relayed to your patient and additional revenue for you.



### **Subscription Warning Definitions**

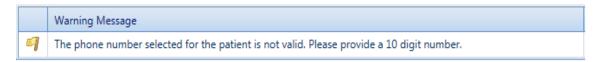
Item on Template missing Pricing / Proc code: This flag appears when one or more items on
the created SO template is missing pricing or a proc code. These issues should be corrected on
the inventory item level so that all new SO Templates created will have the correct information.



#### **Resolution:** Select valid proc code for item

From the **Inventory** menu, go to **Items** and search on the item that is listed as having a missing proc code/pricing. Select the 'Edit Item' icon and add a proc code, select the 'Pricing' tab and add payor price table. Go back to the patient's SO template and select the valid proc code for the item(s).

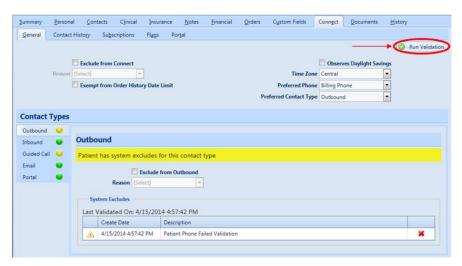
 Invalid Phone Number: This flag appears when the patient's account phone number (Site Setting Default phone source) cannot be validated by the system (e.g., missing area code and/or phone number).



**Resolution:** Add phone number to the patient's account.

In most cases you will need to add the number to the billing section (Check your Connect Site Setting for default phone source).

After updating the patient's phone number it is important to activate this patient's account to receive Connect calls. From the patient's account, go to **Connect > General**, click the "**Run Validation**" button to remove the exclude from all Contact Types displaying as suspended (yellow indicator) due to the invalid phone number.





 Required proc code missing from the Template: This flag appears when a proc code within the Campaign is marked "Required on Template" is not found in the patient's order history.



Resolution: Add missing Item to the Sales Order Template

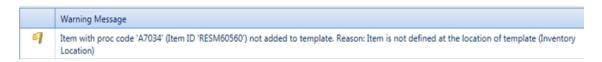
To add a missing procedure code to the template, click on the Sales Order Template.

In the Sales Order Template click on the **Items** tab, then **Add Item** or complete a quick add item to add the missing procedure code to the template. This is the same process used to add items to a sales order.

After you have located the missing item and added it to the template click on the schedule tab to ensure that the "**Next Available**" date is visible. If not, click the "**Refresh**" button to populate the next available date for this procedure code.



Item and Template Location Mismatch: This flag appears when the system finds an item in the
order history which is not available at the default inventory location.



Resolution: Add Default Location to Item

From the **Inventory** menu, go to **Items** and search on the item that is listed as having a mismatch inventory location and add that inventory location to the item.



Competitive Bidding Area: This flag appears when the system finds a patient within a
Competitive Bid area zip code if the Branch office of the patient was not awarded the competitive
bid.



Resolution: Disable the patient from the resupply type.

As with other warning flags, you are not required to make changes to the subscription or sales order template. However, if left as is, Connect will make a call to patient when resupplies are eligible.

If you were awarded the competitive bid, the above subscription warning flag will not appear for patients in those areas. If grandfathering, please inform your implementation consultant and additional information will be supplied.

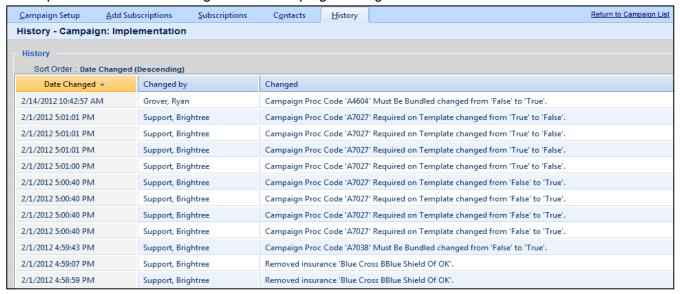
#### NOTE:

Once a warning flag issue is addressed, you must return to the campaign subscriptions to remove the flag by clicking on the red **X** to the right of the flag.

### Campaigns - History tab

The Campaign History tab is the standard Brightree audit trail which lists all changes to both the campaign settings and patient subscriptions. Tracking information includes the date of the change, the user making the change and the updated campaign information. This audit trail information is retained for two years after which time is archived from the system.

The top section tracks all changes to the campaign settings.





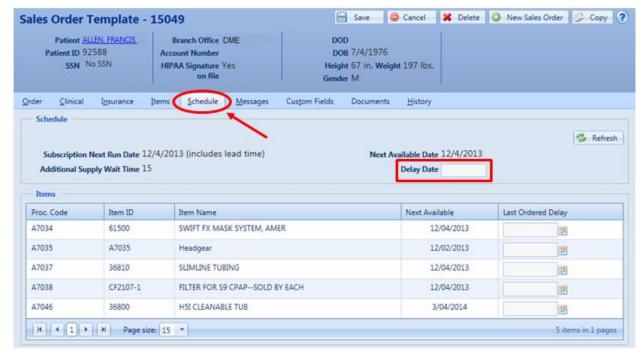
The bottom section tracks all of the patients subscribed or removed from a campaign.



### **Brightree Connect Sales Order Templates**

Your Brightree Connect Sales Order Template greatly resembles that of any other Sales Order Template found in Brightree today; the major deference noted with the Connect Sales Order Template is the **Schedule** tab.

The **Schedule** tab grants you the ease of reviewing the supply items and their next eligible date for reimbursement according to the campaign set up, when the next call to the patient is scheduled to be released, and provides you with an area to delay or postpone the date of the next call.



The



'Delay Date' field cannot be used to "pull back" eligibility for an item, only delay it. If the delay date falls beyond the last order date it will go back to the regularly calculated last order date.

In order to delay a specific item instead of the entire order, select to edit the page and update the 'Last Ordered Delay' date and save.

Clicking save will update the 'Next Available' date for that particular line item.



Review the items on the SO Template for accuracy. You may want to add an additional item(s), adjust quantities or add a claim note. These adjustments are not required. However they will improve the efficiency of your staff and help to increase resupply revenue.



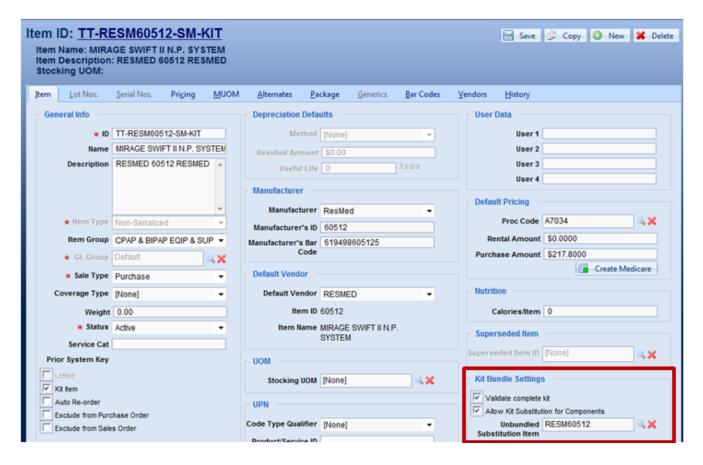
### **Kitted Items and Brightree Connect**

If you have an established kit in the inventory catalog that consists of two or more items, Brightree Connect can recognize which supplies belong to which kit.

If an order is placed for all items listed within a kit, the system will substitute the individual items for the kitted inventory item on the sales order created within Brightree Connect. Likewise, if the patient orders only one item of a kitted package, the single item codes will appear on the sales order instead of the kitted item ID.

Item level set up is required for this feature to be active.

- Create a kit with the mask as the main item
- Check the boxes "Validate Complete Kit" and "Allow Kit Substitution for Components"
- Add the "Unbundled Substitution Item" number for the mask

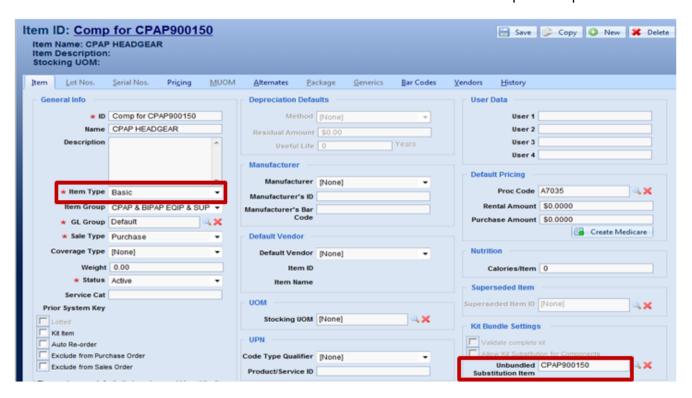




Kits must be set up with the correct package items and quantities.

For each item kitted with the mask

- Create a new component (ex: headgear) by copying the item and setting the item type to a "Basic" status.
- Add the "Unbundled Substitution Item" identification number for the copied component item.

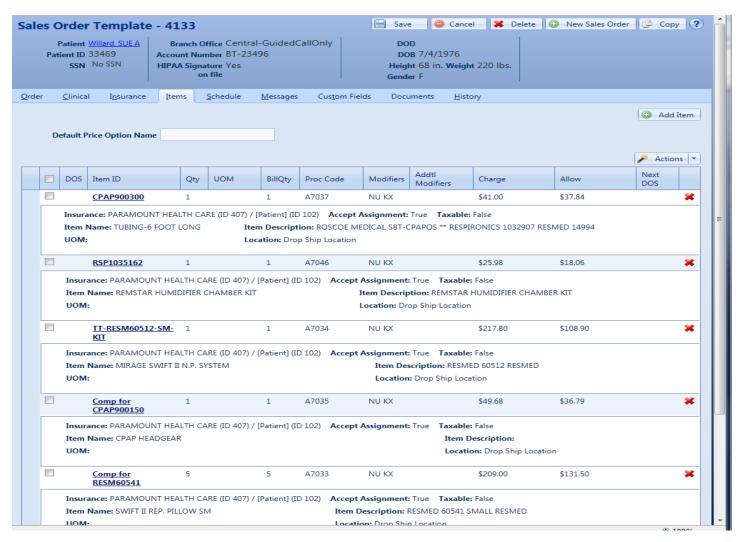


• From the Kit Item ID "Package" tab, add component items to the kit by selecting "Add Item" and locating the item within your inventory.



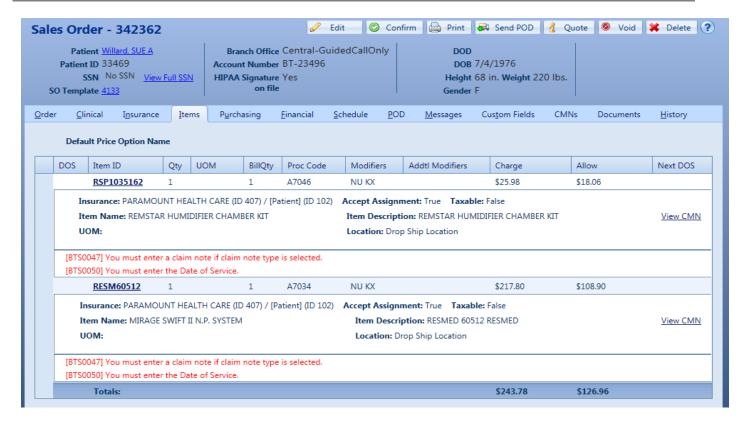


When using the Kit Substitution feature, Sales Order templates in Connect should contain the main Kit item (mask), Component items (i.e. headgear and nasal cushions/pillows if applicable), as well as any additional non-kitted items listed within sales order history that you would like to be offered to the patient during a Connect contact.



If the patient orders all of the items listed within a kit during the Connect contact, the Sales Order will contain the kit code and the basic component items contained within the kit.





If all items within the kit are not ordered the "Unbundled Substitution Item(s)" will be applied to the created sales order from Connect. Connect will also provide a warning on the sales order notifying you that the quantity is not adequate to complete the kit.

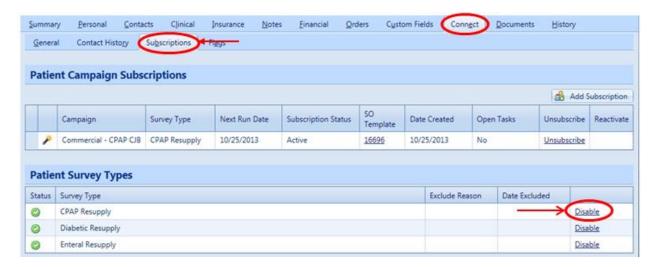
\*\*THIS FEATURE IS ONLY OPERATIONAL FOR SALES ORDERS CREATED BY A CONNECT TEMPLATE\*\*



### **Excluding a Patient from a Campaign or Survey Type**

When working in Connect there will be times when you must evaluate the need to exclude a patient from Connect system, alter their contact type, or remove them from a survey type campaign.

In the patient's account, go to **Connect > Subscriptions**, you can view and manage the various Survey types that are enabled for the patient. Clicking the "**Disable**" hyperlink would prevent calls for the selected resupply type, removing them from the campaign and disabling the Sales Order Template. Select a reason for excluding/disabling the patient then click 'Ok'. All

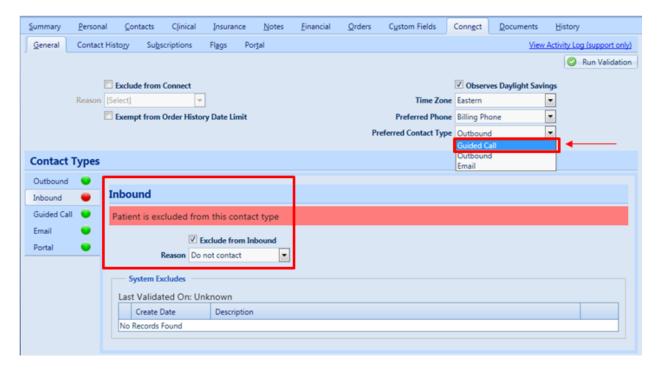


For patients whose Branch Contact Type Preference is "**Outbound**" but would prefer NOT to receive automated calls but instead a Guided Call (live call) or Email (feature must be activated). From the patient's account **Connect > General** tab, change the **Preferred Contact Type** to 'Guided Call' or 'Email'. Patients with this setting will now be queued to your Guided Call Work List when eligible for resupply or an Email sent to alert the patient of resupply eligibility.

You can also choose to exclude the patient from utilizing the inbound toll free resupply number by excluding them from the Inbound Contact Type. Click on the **Inbound** Contact Type, check the **"Exclude from Inbound"** box, and select a reason then save,

NOTE: All **Contact Types** status indicators remain green but are overridden by the Preferred Contact Type.





#### **NOTE:**

A patient must possess the preferred contact type of "Guided Call" to be automatically excluded from outbound calls.

When it is necessary to convert all patients in a particular branch from Outbound calling to Guided call, you may select this parameter at the branch level. These patients will be identified by a yellow band within the patient's account Connect tab noting that the patient's branch only allows guided calling. All patient preferred contact types will be overridden by this setting.



This patient type will not be listed within your Exclusions for outbound calling; they may be identified by running an Ad-Hoc report of all patients subscribed within the "Guided Call Only" branch office.

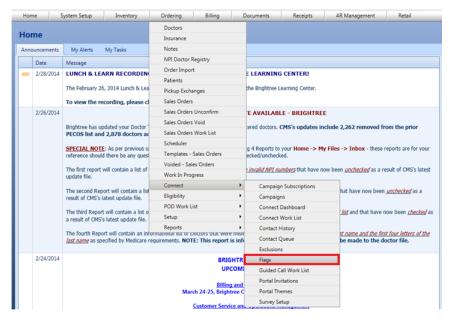


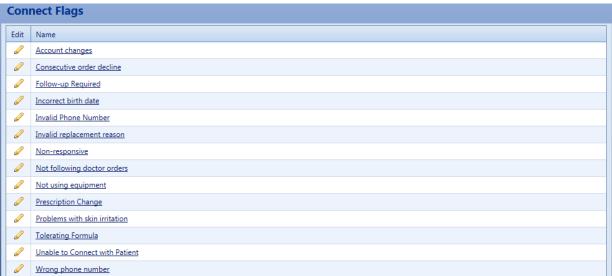
### **Brightree Connect Flags**

Flags are events that are created by the system as a result of a patient's response to a survey question. In general, flags are the "exceptions" or "alerts" that require some type of manual intervention, both in the system and frequently with regard to contacting the patient directly.

Flags should be addressed by a Brightree User with the appropriate skills to resolve the issue.

Go to **Ordering > Connect > Flags** to review the list of possible flags. An explanation of each flag type is listed below.







### **Flag Types Definitions**

The following are system default operation definitions for each flag. If the user has chosen to alter the default via Flag automation settings, the new automation setting(s) override.

**Account changes:** If the patient indicates changes in their insurance coverage, physician or address, the system will automatically create a flag and move the subscription to a "Suspended" status. The system will generate a task for a Brightree User to resolve before returning them to the active list. A sales order for the supplies the patient accepted will not be created until this flag is closed.

**Consecutive order decline:** If your patient has declined to place an order consecutively, for a specific number of times (as defined in the Site Settings), the patient remains active, but a flag is generated to notify a Brightree User to follow-up with the patient. The exact number of attempts the system will try to contact the patient for re-orders is determined by the Site Setting called "Brightree Connect - Flag for consecutive declines". See the Site Settings section (Configuration guide) for more information.

**Follow-up Required:** When a diabetic patient responds "Yes" they have changed to a new brand or model of meter since the last order, the system will automatically create a flag and move the subscription to a "Suspended" status. The system will generate a task for a Brightree User to resolve before returning them to the active list. A sales order for the supplies the patient accepted will not be created until this flag is closed.

**Incorrect birth date:** One of the initial survey questions a patient is asked is to confirm their year of birth. The patient has three attempts to enter the information correctly. If the information provided does not match the patient's account, the system will politely end the call and move that patient to a "Suspended" status. The system will generate a task for a Brightree User to call the patient to correct the year of birth information in their account or provide patient education.

**Invalid Phone Number:** If during the outbound call the automated dialing system detects the phone number is not a valid, in-use number, the patient will be moved to a "Suspended" status and a task will be generated for a Brightree User to investigate and resolve before returning them to the active call list.

**Invalid Replacement Reason:** If during the call the patient does not select any of the options provided as reasons for replacement as it relates to each procedure code listed on the campaign, the system will automatically create a flag and move the subscription to a "Suspended" status. A task will be generated for the Brightree User to resolve before returning them to an active status. A sales order for the supplies the patient accepted will not be created until this flag is closed.

**Non-responsive:** If the patient does not respond or the system cannot understand the caller's response to any question after three attempts for the same question, the patient will be moved to a "Suspended" status. The system will generate a task for a Brightree User to resolve before returning them to an active status.



**Not following doctor orders:** One of the required questions the system will ask diabetic patients is to confirm the patient is testing according to doctor's orders. When the patient responds "No", the system will politely end the call and let them know they will receive a personal follow up call to discuss their therapy. The subscription is moved to a "Suspended" status. A task is generated for a Brightree User to contact the patient to investigate and resolve.

**Not using equipment:** One of the required questions the system will ask PAP patients is to confirm the patient is using their equipment appropriately. When the patient responds "No", the system will politely end the call and let them know that they will receive a personal follow up call to discuss their therapy. The subscription is moved to a "Suspended" status. A task is generated for a Brightree User to contact the patient to investigate and resolve.

**Prescription Change:** When an enteral patient responds "Yes" there has been a change in their prescription since the last order, the system will automatically create a flag and move the patient to a "Suspended" status. The system will generate a task for a Brightree User to resolve before returning them to the active call list.

**Problems with skin irritation:** When a PAP patient responds "Yes" they are experiencing skin irritation from using their equipment or request a call to discuss their therapy, the system will generate a task for a Brightree User to contact the patient to investigate and resolve. A sales order for the supplies the patient accepted will not be created until this flag is closed.

**Tolerating Formula:** When an enteral patient responds "No" to tolerating formula, the system will generate a task for a Brightree User to contact the patient to investigate and resolve. A sales order for the supplies the patient accepted will not be created until this flag is closed.

**Unable to Connect with Patient:** If the system is unable to reach the patient directly after a specified number of attempts, the system will generate a task for a Brightree User to call or send a letter to the patient to resolve. The exact number of attempts the system will try to contact the patient for re-orders is determined in the Campaign setup. See the Campaign section (Configuration guide) for more information.

**Wrong phone number:** If the person answering the survey indicates that we have reached an incorrect number, the patient will be moved to a "Suspended" status and a task will be generated for a Brightree User to investigate and resolve before returning them to the active call list.

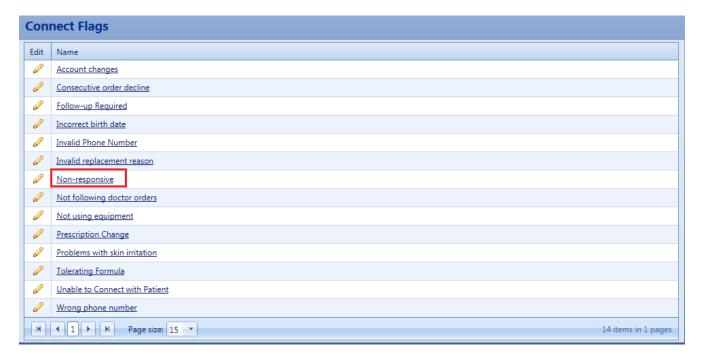
You may also want to reference the survey script to help you understand the context of the flag (question to patient response/flag).



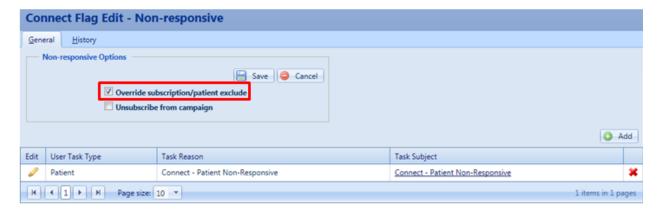
### **Flag Automation**

Connect allows you the control to determine the handling of flag generated tasks. With flag automation, you have the ability to override the system default handling of a flag and automate what happens when an exception/flag is received providing improved efficiencies.

To access flag automation, click on the desired flag name hyperlink to open the flag for editing.

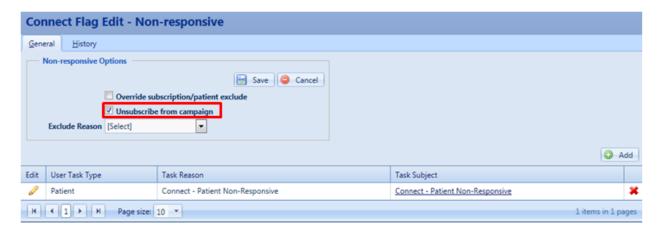


The 'Connect Flag Edit – Flag Name' screen displays.



From the edit screen you have the ability to override the exclusion that Connect imposes when the associated call result is returned. Clicking the box 'Override subscription/patient exclude' will eliminate the patient from being excluded from further contact until the 'Unable to Connect' limit is reached, at which time the 'Unable to Connect' flag will create, alerting you for patient follow up. Note: The patient's subscription will remain active and the patient will be placed back in the call cycle.





You may also select to have the patient automatically disabled from the survey resupply type when the associated call result is returned by checking the 'Unsubscribe from campaign' box and choosing an 'Exclude Reason'. If the 'Override subscription/patient exclude' is not checked, the flag and task will still create but the patient will be disabled from the survey resupply type.

Click 'Save' when complete.

#### **NOTE:**

Flag automation options are based on current system functionality. Some flags will only have the availability to 'Unsubscribe from campaign' as the flag is not designed to exclude the patient so no override option is required.

## **Brightree Connect Notes / Task Templates**

Notes / Task templates are used in Connect to track and document the resolution steps of flags that are generated from contacting your patients. When a flag is created in Connect, you have received notification a circumstance exists with your patient requiring your direct intervention. The Connect Notes / Task templates are located under the 'Patient Note Reasons' category.

#### **8** Best Practice

Quick and efficient resolution of flags is accomplished by using **Notes and Task Templates** and incorporating them into the regular maintenance of your re-supply program since it involves issues affecting patients' compliance to therapy, any account changes and their status. You may use the templates to include your preferred steps to resolve each flag.



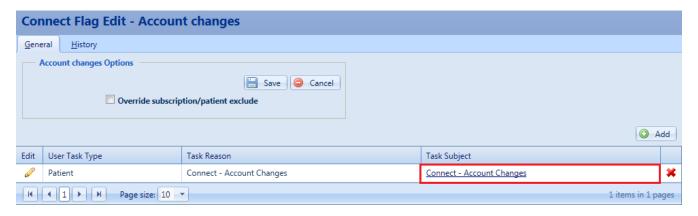
### **Creating and Managing Note/Task Templates**

Note/Task Templates help you streamline, automate, and implement best practices for tasks.

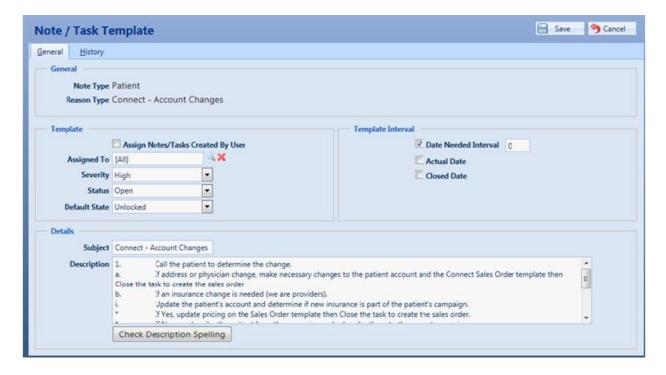
You can decide to allow Connect to automatically assign the Tasks to specific individuals in your organization with the expertise to resolve the task or you may choose to leave them open to allow anyone to resolve open Tasks associated with Connect flags.

To best understand how to use Note/Task Templates with Connect, review the following regarding access and field level information for a task template.

- 1. To access the note/task templates, go to **Ordering > Connect > Flags**, select the desired Connect Flag by click the flag name hyperlink.
- 2. From the 'Connect Flag Edit *Flag name*' screen, click the 'Task Subject' hyperlink assigned to this flag.



The Note / Task Template screen will display





General - This section auto-populates with Note / Task Type and Reason Type.

### **Template**

**Assigned To -** Enter the employee's name that will receive and be responsible for the task. They will find the assigned Tasks on their Home Page under My Tasks.

**Severity -** If the task is holding up a patient order, you will want to assign a relatively high severity to resolve the issue is a short amount of time. Patient expectations have been set by the call.

**Status -** The Status of your Note / Task template should be set to 'Open'. The flag will be closed by the user at the time the flag is resolved.

**Default State -** You can **Lock** the **Default State** to protect the integrity of your template status. This will prevent the Brightree User from editing the Subject Line and Description.

**Note:** if you select 'Locked' as the default state, you MUST provide a Subject and Description for the template. Otherwise, users will be unable to close the tasks created.

Using the account changes example may be a reason to lock the default state. Or you may leave the Template **Unlocked** and allow changes.

Only lock the task template once you have the description field edited to your preferred practices.

### **Details**

**Subject** is what will display in the Task list.

**Description:** You may use the Description field to detail your preferred best practice for resolution/response to a particular flag. See the flag resolution best practice guidelines to create your note/task template descriptions. These are pre-set at the time of your implementation but can be adjusted to your business operations.

For example, if a patient reports account changes; you may have a set of steps outlined for follow up. By using the task templates, you would help to reinforce and drive the best practice throughout your organization.

#### **NOTE:**

Do not check "Assign Notes/Tasks Created by User. If you check this box, when you are using Task Templates, the system will auto assign the task to Connect and will not be viewable.

#### **NOTE:**

Closing the last open Note /Task associated with a Suspended Sales Order will automatically release the Order. Make sure all account changes have been entered and the sales order template updated before closing the task.



### **Template Interval**

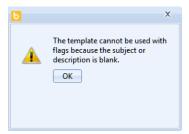
**Date Needed Interval -** Allows you to calculate and assign a date in which you would like the task created. Check the "Date Needed Interval" box and insert the number of days from today's date that you would like for the task to appear under the "My Task" tab.

Setting the date interval needed to "0" will prompt the task to appear under "My Task" on the same day the flag is created, setting the date interval to "1" will prompt the task to appear on tomorrow's date.

**Actual Date** and **Closed Date** - These are not commonly used and not recommended for Connect.

Patient Notes cannot have a blank Subject line or Description; within Connect only, you cannot associate a Note (Patient, Financial, etc.) with a FLAG that has a blank subject line or description.

The note can be created with a blank subject/description, but when you go to associate it with the flag you will see the following pop-up:





### Flag Resolution Best Practice Guidelines

### **Connect - Account Changes**

- 1. Call the patient to determine the change.
  - a. If address or physician change, make necessary changes to the patient account and the Connect Sales Order template then 'Close' the task to create the sales order.
  - b. If an insurance change is needed (we are providers).
    - i. Update the patient's account and determine if new insurance is part of the patient's campaign.
      - 1. If 'Yes', update pricing on the Sales Order template then 'Close' the task to create the sales order.
      - 2. If No, unsubscribe the patient from the campaign and subscribe them to the correct campaign.
    - ii. If you subscribed the patient to a new campaign verify that the items on the new Sales Order template are correct.
  - c. If an insurance change is needed (we are NOT providers).
    - i. Contact the patient's physician to inform them of the circumstance.
    - ii. Schedule a pickup of the equipment with the patient, if applicable.
    - iii. Disable the patient from the resupply survey (Connect > Subscriptions).

### **Connect - Consecutive Order Decline**

- 1. Contact the patient to determine the reason for declining multiple orders for resupply.
  - a. If the patient decides to place an order
    - i. Initiate the Guided Call Wizard to create the order from the Sales Order template (the patient will be returned to the queue for the next calling cycle).
  - b. If the patient still declines any re-supplies but still wants to receive automated calls
    - i. Initiate the Guided Call Wizard to process the request and delay the call as defined by the Campaign or enter a 'delay date' on the Sales Order Template Schedule tab to delay the next scheduled call until the specified "delay date".
  - c. If the patient no longer wants to receive calls from the Connect system
    - i. Disable the patient from the resupply survey (Connect > Subscriptions).
- 2. Close the task.

### Connect - Follow-Up Required (Diabetic patients)

- 1. Call the patient to follow up regarding their new brand of meter, determine where they purchased and if they received supplies at the same time.
- 2. If the patient recently received new supplies from a different provider, determine if the patient wishes to continue using our company.
  - a. If 'Yes', verify new type of supplies are needed for new machine.
    - i. Update the Sales Order template and insert a "delay date" on the Sales Order Template Schedule tab to delay the next scheduled call to the patient until the specified "delay date".
    - ii. Educate the patient on the Connect System.
  - b. If No, disable the patient from the resupply survey (Connect > Subscriptions).



### Connect - Invalid Replacement Reason

- 1. Call the patient to follow up regarding their need for eligible supplies.
- 2. Determine the "Other" or invalid reason the patient is experiencing with the supply item(s).
  - a. Note the reason for resupply for those items using the 'New Comment' button from the task.
- 3. Close the task to create the sales order.
  - a. Only those supplies with a valid replacement reason supplied during the call will be added to the sales order once the task is closed.
  - b. After speaking with the patient, if necessary, add the missing item(s) with invalid replacement reasons to the sales order.

#### Connect - Incorrect Birth Year

- 1. Call the patient to determine the correct date of birth.
  - a. If patient/user error educate the patient on the Connect system (only requires Year of Birth NOT Date of Birth).
  - b. If patient date of birth on file is incorrect, update the patient record.
- 2. Close the task.
- 3. If the patient decides to place an order, initiate the Guided Call Wizard to create the order from the Sales Order template.
- 4. If the patient declines any re-supplies, initiate the Guided Call Wizard to process the request and delay the call as defined by the Campaign or enter a 'delay date' on the Sales Order Template Schedule tab to delay the next scheduled call to the patient until the specified "delay date".

### **Connect - Patient Non-Responsive**

- 1. Review the patient's Connect Contact History to determine patient responses to the survey questions.
- 2. If the patient answered "Yes" to needing new supplies. (Question #2)
  - a. Contact patient and discuss what happened during the call and provide patient education on the Connect system.
  - b. Initiate the Guided Call Wizard to create the sales order from the Sales Order template.
- 3. If the patient answered "No" to needing new supplies. (Question #2)
  - a. Log applicable comments in the task.
- 4. Close the task (the patient will be returned to the calling cycle).
- 5. Click 'Run Validation' button on the patient's account (Connect > General > Edit).



### Connect - Not following Doctor's Order (Diabetic patients)

- 1. Call the patient to determine reason for not following the doctor's orders.
- 2. Document the patient's account accordingly.
- 3. If patient is continuing use of equipment:
  - a. Close the task.
  - b. Initiate the Guided Call Wizard to create the sales order from the Sales Order template.
- 4. If patient has discontinued use of equipment:
  - a. Disable the patient from the resupply survey (Connect > Subscriptions).

#### **Connect - Not Using Equipment**

- 1. Call the patient to determine the reason for not using their equipment.
  - a. If patient is continuing use of equipment with different supplies:
    - i. Update the Sales Order Template with the new supplies.
    - ii. Close the task.
    - iii. Reactivate the subscription (Connect > Subscriptions)
    - iv. Create a Sales Order from the updated template.
    - v. Log any applicable comments in the task.
  - b. If the patient is no longer using their equipment.
    - i. Contact the patent's physician to inform them of the circumstance.
    - ii. Schedule a pickup of the equipment, if applicable.
    - iii. Disable the patient from the resupply survey (Connect > Subscriptions).

#### <u>Connect - Prescription Change (Enteral patients)</u>

- 1. Call the patient to follow up regarding their prescription change. Contact the physician if necessary.
- 2. If patient recently received new supplies from a different provider, determine if the patient wishes to continue using our company.
  - a. If 'Yes', insert a "delay date" on the Sales Order Template to delay the next scheduled call to the patient until the specified "delay date".
  - b. Update the Sales Order Template if item amount changed.
  - c. If No, disable the patient from the resupply survey (Connect > Subscriptions).

#### Connect - Problems with Skin Irritation

- 1. Call the patient to determine the source of the skin irritation.
- 2. Log patient responses in the task.
- 3. Determine if the patient needs new or different supplies
  - a. If 'Yes', update the Connect Sales Order template.
    - i. Close the task for Connect to create the sales order from the updated template
  - b. If No, Close the task for Connect to create the sales order from the current template.
- 4. Delete the sales order created by Connect if a manual order was created.



#### **Connect - Not Tolerating Formula (Enteral patients)**

- 1. Call the patient to determine the level of intolerance.
- 2. Log patient responses in the task.
- 3. Determine if the patient needs new or different supplies.
  - a. If 'Yes', contact the physician to inform them of the circumstance.
    - i. Update the Connect Sales Order template if a prescription change has occurred.
    - ii. Close the task for Connect to create the sales order from the updated template.
  - b. If No, Close the task for Connect to create the sales order from the current template.

#### **Connect - Unable to connect with Patient**

- 1. Contact the patient (Letter, post card, personal call) to determine the reason for unsuccessful Connect attempts.
- 2. Log any applicable comments in the task
- 3. Close the task.

#### **Connect - Wrong Number**

- 1. Contact the patient to obtain the correct phone number.
  - a. Update the patient's account.
  - b. If the current number dialed was correct, note the flag was due to patient error.
    - i. Educate the patient on the Connect System.
  - c. Close the task.
- 2. Obtain order from the patient and initiate the Guided Call Wizard to create the sales order from the Sales Order template.
- 3. If patient does not want to receive calls from the Connect system
  - a. Disable the patient from the resupply survey (Connect > Subscriptions).

#### Connect - Invalid Phone Number

- 1. Contact the patient (Letter, post card, email, personal call) to obtain a valid phone number for future calls.
  - a. Update the patient's account.
  - b. Log any applicable comments in the task
  - c. Close the task.
- 2. Remove the 'System Excludes' hold from the patient's account (Connect > General) by clicking the red 'X' for the Outbound Contact Type.
- 3. Disable the patient from the resupply survey (Connect > Subscriptions).



### Flags Based on Survey Type:

### **CPAP Flag Types**

- Account changes
- · Consecutive order decline
- Incorrect birth date
- Invalid Phone Number
- Invalid replacement reason
- Non-responsive
- Not using equipment
- Problems with skin irritation
- Unable to Connect with Patient
- Wrong phone number

#### Diabetic Flag Types

- Account changes
- · Consecutive order decline
- Follow-up Required
- Incorrect birth date
- Invalid Phone Number
- Non-responsive
- Not following doctor orders
- Unable to Connect with Patient
- Wrong phone number

### **Enteral Flag Types:**

- Account changes
- Consecutive order decline
- Incorrect birth date
- Invalid Phone Number
- Non-responsive
- Tolerating Formula
- Prescription Change
- Unable to Connect with Patient
- Wrong phone number



### IntelligentQ

The IntelligentQ is a Brightree Connect background process that ensures all your patients are being queued for a call at the right time, for the right supplies. Prior to the call being placed, the IntelligentQ reviews the list of subscribed patients and performs the checks noted below. Based on the outcome of this review, the IntelligentQ determines if the patient should be called or placed on the "Guided" call list.

The list of final checks includes:

- Has the patient's call been manually delayed?
- Is the campaign still active and not on hold?
- Has the subscription been suspended or deleted?
- Has the patient been excluded?
- Has the patient passed away (deceased)?
- Is the patient's account on hold?
- Are there proc codes listed on the template and/or campaign?
- Is the patient's insurance provider listed on the campaign?
- Is the date of birth documented?
- Is the patient's template active and not on hold?
- Has the patient's phone number been provided?
- Has the patient's insurance policy expired?
- Has the patient's insurance policy been verified?
- Has the patient's insurance provider been excluded?
- Is the call being placed during the correct dialing times?
- Are the site and branch setup data configured (branch, caller ID, etc.)?
- Is the patient still eligible for supplies (in case the patient ordered supplies that day)?
- Are the proc codes listed on the template added to an active CMN? (only checked if setting enabled on the campaign)

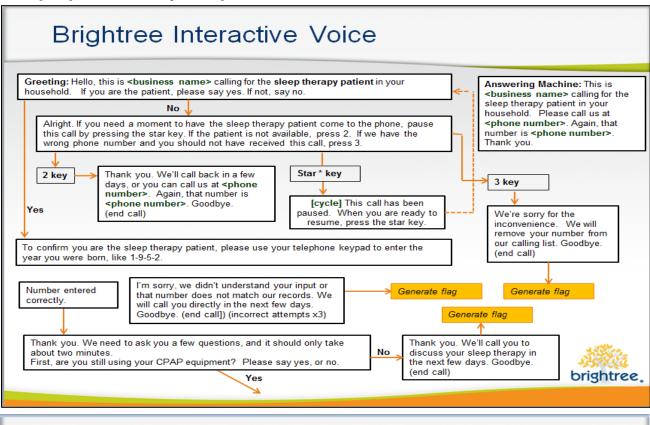


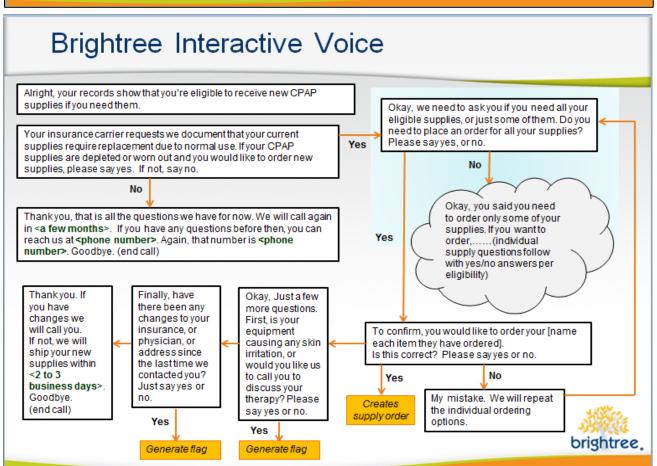
# Glossary

Campaign	A structured plan to contact a patient with a desired outcome. Campaigns include all the settings used for determining who and when to initiate contact, including: <ul> <li>insurers covered by a campaign</li> <li>procedures codes (HCPCs) covered by a campaign</li> <li>survey used for a campaign</li> <li>contact days/times</li> </ul>
	<ul><li>number of contact attempts to make</li><li>contact frequency</li></ul>
Campaign Type	Defines the objective of a campaign. At the present time, the only campaign type is Resupply. The campaign type is used to determine what action Brightree should take with results from a contact. For Resupply campaign types, Brightree Connect evaluates the results of a call to determine if a sales order should be created.
Contact Timeframe	The range of hours during which Connect can make contact with a patient, defined at the branch and campaign level. When scheduling contact for a given subscription, only the timeframes selected for both the campaign and patient's branch are used. This allows users to schedule a campaign to make contact on weekday afternoon and evenings, but not contact patients from a specific branch on Mondays because the office is closed.
IntelligentQ	The IntelligentQ is a Brightree Connect background process that ensures all of your patients are being queued for a call at the right time, for the right supplies. It confirms that the subscribed patients for a campaign meet all of the requirements while validating that the latest data is being used to place calls.
Flags	Flags represent exceptions which arise during contact with a patient which require manual intervention. Examples of flags include a patient's insurance or delivery information has changed, or a patient is no longer using their equipment. Users can link flags to User Task Templates, so a Patient, Practitioner, or Financial Note is created to log the exception and track follow-up.
Subscription	The link between a patient and a campaign. For resupply campaigns, the link is created through a sales order template. Patients can only have one subscription to a given campaign, and only one active subscription to a given campaign type (e.g., CPAP). Subscriptions can be suspended by users as well as by Exceptions created during a Connect contact, such as the patient indicating she is no longer using her equipment.



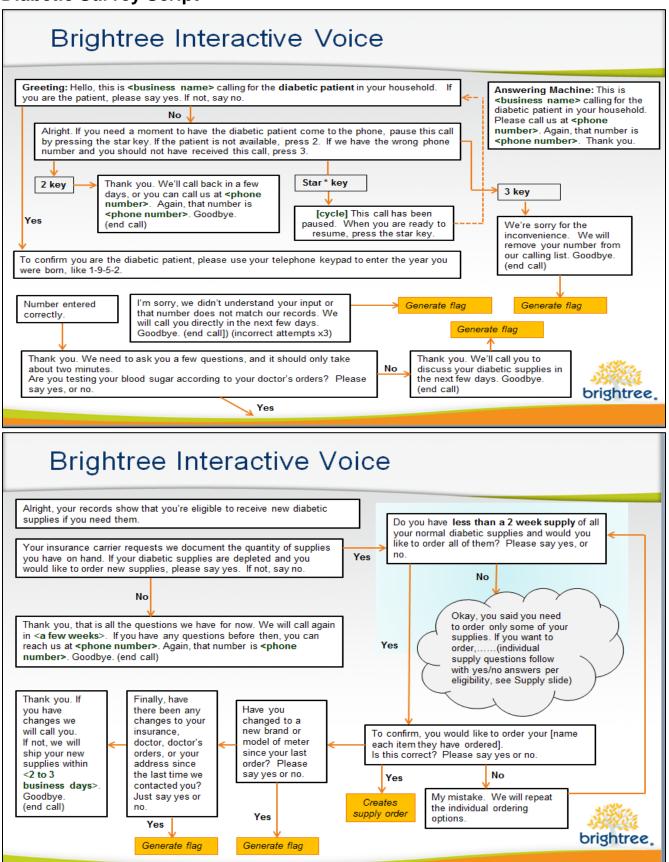
### Sleep Apnea Survey Script





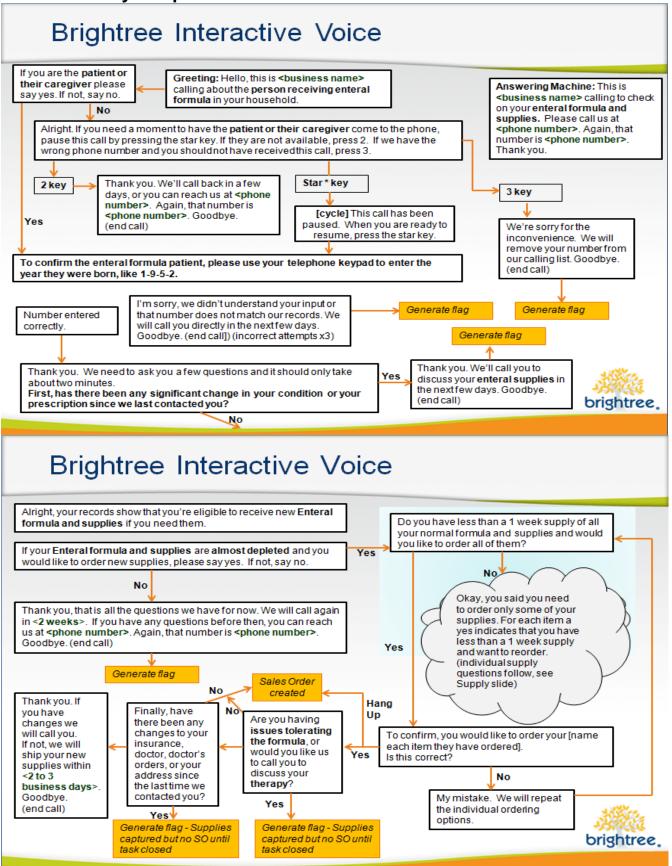


### **Diabetic Survey Script**





### **Enteral Survey Script**





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