Implementation Overview

RevSpring™

Methodology

Confirm Desired User Experience

Lead Implementation Activities

Share Best Practices

Design and configure the solution to support <u>YOUR</u> business goals

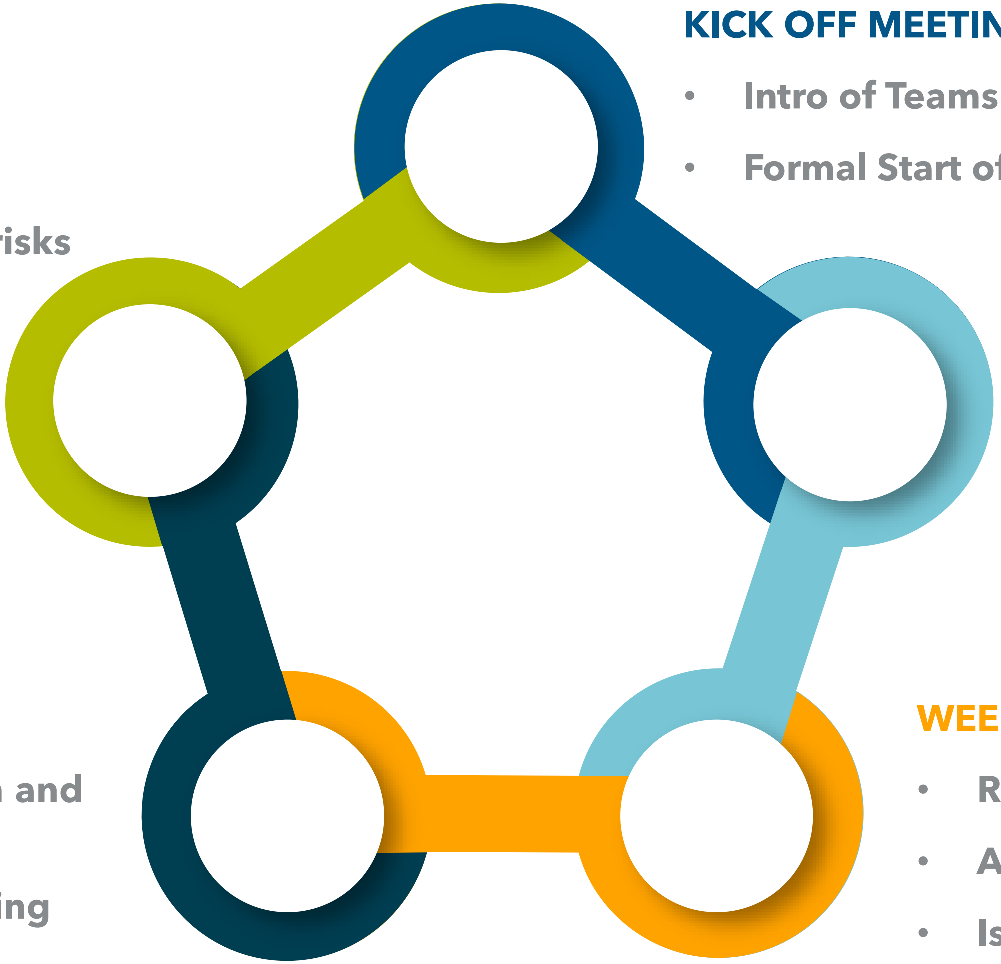
Communication

SCORECARD

- Tracks progress and risks
- RYG Status
- Monitored weekly

KICK OFF MEETING

- Intro of Teams
- Formal Start of Project



PROJECT PLAN

- Timeline Details
- Deliverables
- Task Assignments

MEETING MINUTES

- Document discussion and decisions
- Sent after each meeting

WEEKLY PROJECT MEETINGS

- Review Project Status
- Action Items
- Issues

RevSpring

Project Phases

Project Initiation

Tasks

- Team Assignment
- Kickoff Call
- Project Charter
- Project Timeline, Milestones and Deadlines
- Setup weekly call
- FTP credentials provided to client

Requirements

- Logos, Branding
- Test Data
- File Specs
- Data Map
- Current Documents
- Bank Specs
- ACH Applications

~1–3 weeks

Requirements & Design

Tasks

- Business Rules Defined
- Mockup review and approval
- Data mapping review and approval
- Line of business build
- Merchant Vendor Call (if applicable)
- Programming Guide Completed

Requirements

- Completion of questionnaires
- Design approval
- Data mapping approval
- Merchant approval (VAR Sheets)

~3–9 weeks

Configuration & Development

Tasks

- Solution built per requirements
- Custom Reports
- RevSpring QA build

Requirements

- Merchant Profile setup
- Devices installed

~4–10 weeks

Client UAT & Training

Tasks

- Proof Review
- Merchant Testing
- Product Testing
- User Acceptance Testing
- Bank Scan Line testing
- End user training

Requirements

- Proof approval
- Merchant finalization
- UAT Signoff

~3–5 weeks

Go Live

Tasks

- Internal Audit prior to Go-Live
- Process live file
- QA live file

Requirements

- Confirm live SFTP
- Daily Files

~1–2 weeks

Post Go-Live

Tasks

- Monitor activity
- Schedule post deployment review
- Lessons Learned
- Handoff to AM once everything is running as expected (typically 30 days)

Requirements

- Live file approval
- Print approval
- Confirmation of notifications received

~3–4 weeks

RevSpring

Client Project Team

Client Roles	Departments	Responsibilities/Areas of Expertise
Project Sponsorship (VP/Director)	Revenue Cycle (RCM)	• Project champion, steering committee facilitation, escalation
Project Management	Project Management Office (PMO)	• Project plan maintenance; status reporting; task, resource, issue, & risk management
Data Analysis HIS Integration Web Site Updates Automation	Information Systems (IS)	• Source system data imports/exports/integration – daily balance, statement, scheduling, remit/835, bad debt/charity, external payments • Knowledge regarding source system data hierarchy and relationships • Web site maintenance – URL updates, web page updates • Telecommunications – adding IVR into phone tree
Statement/Portal Branding	Marketing, RCM	• Graphics, logos, URLs, color schemes, messaging
Statement Data/Content	RCM	• Statement requirements; knowledgeable regarding dunning process, payment plans, financial assistance
Payment Processing/Posting	RCM, Finance, Treasury	• Portal and IVR requirements • Knowledgeable regarding payment remittance, allocation, and posting • Familiar with tax IDs, bank accounts, merchant accounts, VAR sheets, bank scan lines
Compliance	Compliance, Legal	• Reviews and approves online disclosures/agreements, payment authorizations, merchant services/ACH applications
Appointment Reminders	Registration, Patient Access	• Appointment reminder requirements • Familiar with appointment scheduling processes
Hardware Deployment	Field Services	• Installation and deployment of credit card and check readers
UAT and Sign-off	RCM, Finance, IS	• Portal, IVR, statement, and POS end user testing • Management sign-off on requirements and test results

Client Engagement Scope

Fill in or Delete

Fill in or Delete

Fill in or Delete

Fill in or Delete

Fill in or Delete

Fill in or Delete

Fill in or Delete

Fill in or Delete

Fill in or Delete

Fill in or Delete

Sample Data Requirements

Daily AR Balance File*	Current Statement Example (sample of each type sent)
Live Statement Data (100 record minimum)	

All documents will be loaded to dedicated SFTP site

*Must follow RevSpring file format specifications

RevSpring

Client Requirements Chart

File	Product	Who needs it	Why we need it	What it impacts if we don't get it
Daily Balance File	PersonaPay IVR	Solution Architect Data Automation	File that contains the current balance for the patient. This could be at the guarantor number level or down to the account number level and is used to present the current balance to the patient in the payment portal and via the IVR. Also needed to support payment plans. Patient can pay at the level of detail we receive in this file (Account number or Guarantor number level), not pay at the "services detail" level (office visit, x-ray, etc.).	Balance shown on payment portal, IVR messaging, outbound reminders (we check if current balance is different than statement balance).
Daily Balance File Details	PersonaPay IVR	Solution Architect Data Automation	This is an optional file that can be used if you are providing a Daily Balance File. This file contains the "services details" for the patient and explains what makes up their balance (i.e. office visit $10, x-ray $50 etc.). The patient cannot pay at "services detail" level but it is available for them to see the specifics of what their balance entails to give them confidence in what the balance represents.	Current balance is available; however, service details that make up the balance are not displayed.

Client Requirements Chart

File	Product	Who needs it	Why we need it	What it impacts if we don't get it
VAR Sheets	PersonaPay IVR	Implementation Consultants & Coordinators	Provides merchant account information (MIDs, terminal IDs, etc.) needed to configure credit card processing.	Unable to process credit card payments
ACH Application	PersonaPay IVR	Implementation Consultants & Coordinators	Used to configure eCheck processing.	Unable to process eCheck payments
Remit File Sample and Specifications	PersonaPay IVR Text-to-Pay	Solution Architect Data Automation	File used to provide payment processing information for those payments taken in a RevSpring application. Typically, some version of an 835 or TXT/CSV HIS system import file. Data provided in this file is used to automate HIS system payment posting processes.	Unable to automatically post RevSpring payments back into the HIS system
Live Statement File	Statements	Implementation Consultants & Coordinators	To complete data mapping, develop statement proof, test a live file/OCR/etc, and setup NCOA.	Cannot print anything until we get live data for testing.
Bad Debt / Charity / Payment Data	Propensity to Pay	Implementation Consultants & Coordinators	Score validation to classify Low, Medium, High and Charity accounts correctly for portfolio.	Cannot change statements based on score and can't segment messages on outbound reminders.

Client Requirements Chart

File	Product	Who needs it	Why we need it	What it impacts if we don't get it
External Payment Data	Dashboard	Implementation Consultants & Coordinators	To populate check payments made outside of payment portal in the Analytics Dashboard.	Typically, 60–80% of payments are via lockbox. We cannot report or make program recommendations without this data.
Scheduling Data	Appointment Reminders	Solution Architect Data Automation	File that contains scheduling details for the patient, including name, date and time of appointment.	Unable to send out appointment reminders.
Completed Requirements Workbooks	PersonaPay IVR Statements Analytics Appointment Reminders	Implementation Consultants & Coordinators	To identify requirements for configuring / developing payment portal, statements, IVR process, appointment reminders, scoring & analytics.	Products and services cannot be configured / developed for production use.

Next Steps

1
Schedule
Discovery Call

2
Assemble
Sample Data

3
Identify
Project Team

Your Feedback

RevSpring appreciates your feedback.

Please feel free to provide it at any time at:
https://www.surveymonkey.com/r/RS-Implementation

RevSpring™

learnmore@revspringinc.com | 248.567.7300 | www.revspringinc.com