Contract Analytics Troubleshooting Decision Support

Peter Carey & Kyle Stuckey

StrataJazz® Training Day

LIFT19
STRATA DECISION SUMMIT
CHICAGO | OCTOBER 21-23

Strata Decision
TECHNOLOGY

Introductions

- Name & Organization
- Experience with Contract Analytics
- What are you hoping to get out of class?

Course Objectives

By the End of Class, You Will Be Able To:

- Identify common issues in contract build including order of operations, creating filters, and rule sets
- Validate and troubleshoot common issues by understanding when to use the tools **test term** and **test contract**
- Create and use What-If models in order to identify an issue in contract model build

© Strata Decision Technology

Course Objectives

How Does This Help You?

- Increased independence
- More accurate reporting
- Save you time building and modifying contracts
- Minimize the amount of times you must reach out to Strata Decision team members to help with a system change or issue

© Strata Decision Technology

Contract Analytics Troubleshooting Agenda

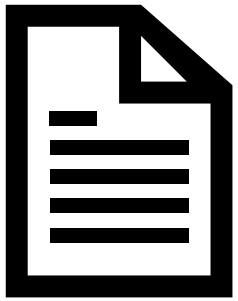
Topic	Key Highlights	Time
Overview of Common Issues	Focusing on giving you the expertise to answer the question, "Why isn't my rule qualifying as expected?"	15 mins
Troubleshooting 3 Common Issues	• Order of Operations • Section Filters • Rule Sets	60 min

Additional Troubleshooting Support	Advice from our Technical Support Team
	• Test Contract vs. Test Term
	• Where to start when you don't know where to start
	  • Basic Troubleshooting Steps
	  • Using the What-If model for troubleshooting
		30 min

Check for Understanding	Assessment and Review Questions	45 mins
Closing		15 mins

© Strata Decision Technology

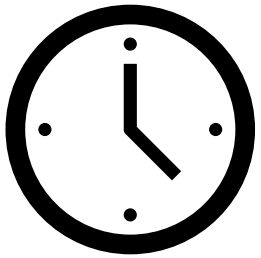
Class Logistics



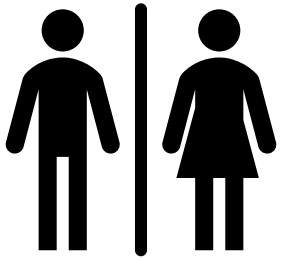
Class Materials
- Training Manual
- Database Log In

WIFI Password
- Name: Strata Decision
- Password: summit2019

Questions
- In-System Workflow
- Organization Specific



Lunch
- 12:30 pm – 1:30 pm
- Zurich level



Restrooms
- This floor near the stairs

© Strata Decision Technology

Types of In-Class Activities

Trainer Demo:

- These are activities your trainer will demonstrate

In-Class Scenario:

- These are activities that you do alongside the trainer

In-Class Scenario: On Your Own

- These are activities that you will complete independently

Write It Down:

- These are activities that include tables or boxes to record definitions and examples for key terms or concepts

Partner Discussion:

- These are activities that include opportunities to discuss and troubleshoot with your partner. At this time, you can share ideas, prior knowledge, and expertise

© Strata Decision Technology

Introduction to Troubleshooting in Contracts

Why isn't an encounter qualifying as expected?

© Strata Decision Technology

Write It Down:
An encounter is not qualifying as expected

Strata Decision TECHNOLOGY

- Why might an encounter not be qualifying as expected?
- What are some possible causes?
- What are some corrective actions you could take?

© Strata Decision Technology

Partner Discussion:
An encounter is not qualifying as expected

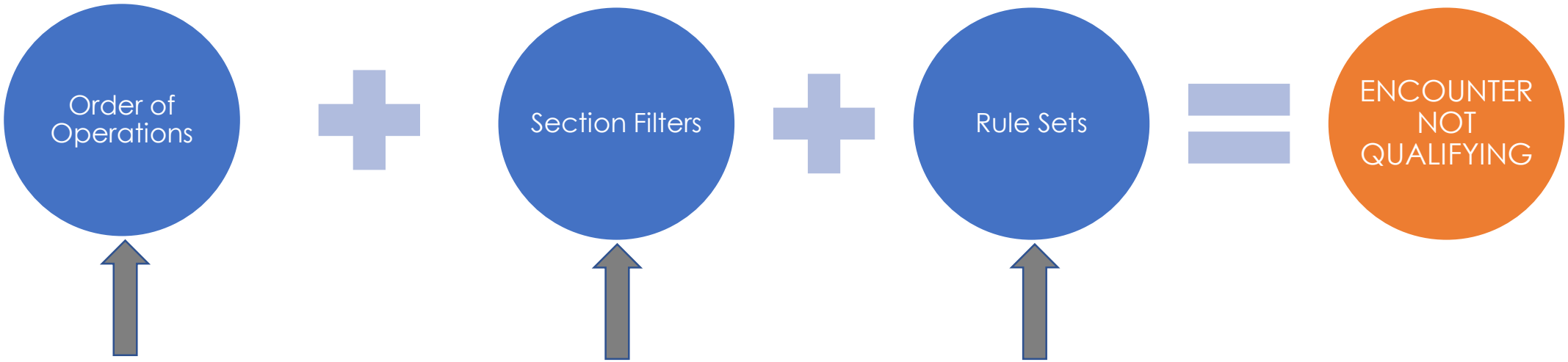
Strata Decision TECHNOLOGY

Discuss with your partner:

- Why might an encounter not be qualifying as expected?
- What are some possible causes?
- What are some corrective actions you could take?

© Strata Decision Technology

Why isn't an encounter qualifying as expected?



LIFT19
© Strata Decision Technology

Order of Operations

Order of Operations Issue

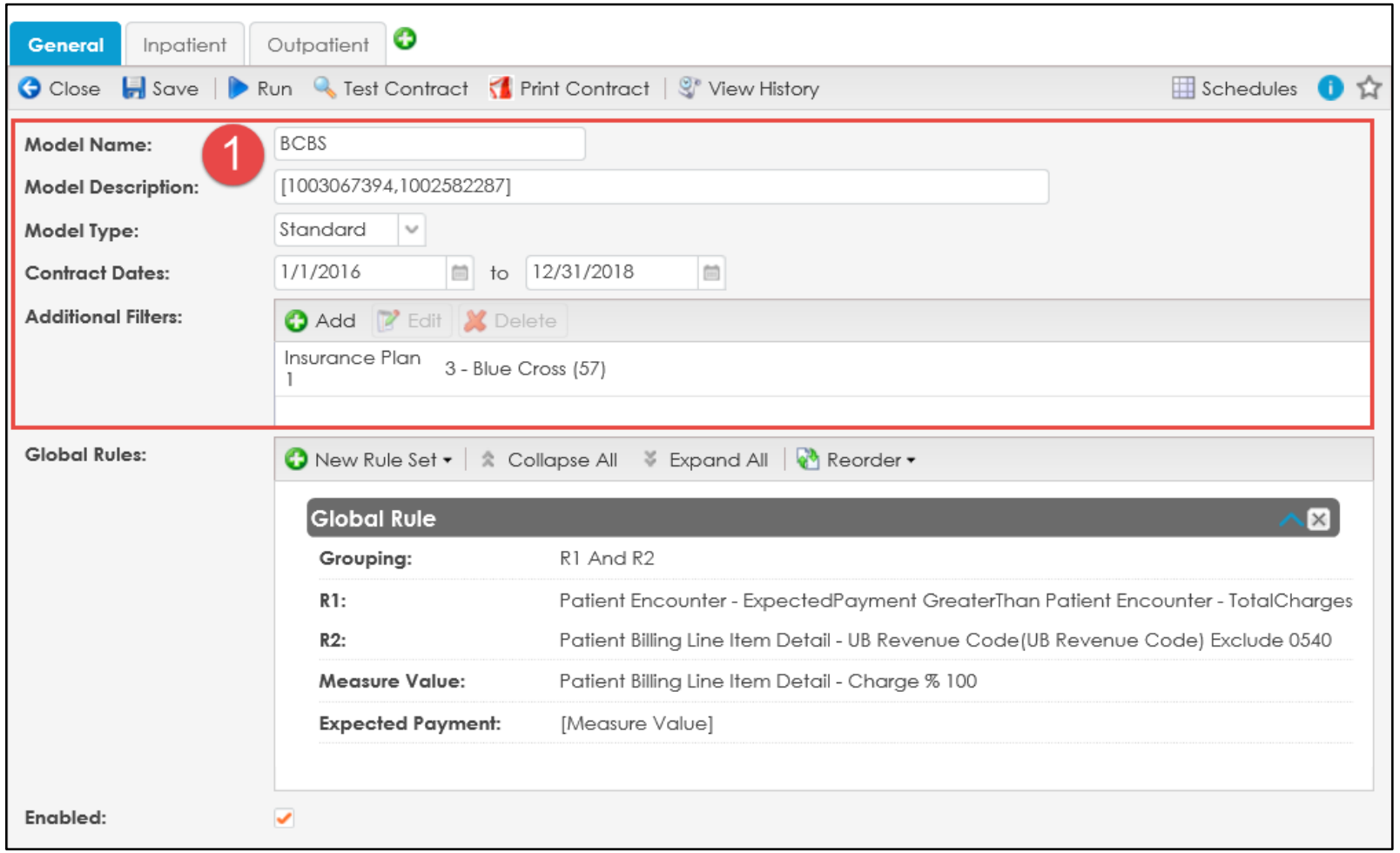
- Issue:
  - The encounter you have selected is not qualifying for the correct basic term.

- Next Step:
  - As the Contract System Administrator, your next step is to confirm the order of operations are in the correct workflow.

© Strata Decision Technology

Order of Operations: General Tab

1. General Tab
   - Model Type
   - Contract Dates
     - The system looks at **discharge dates**
   - Additional Filters
     - Patient Type
     - Insurance Plan
     - Facility



© Strata Decision Technology

Order of Operations: Section Filters

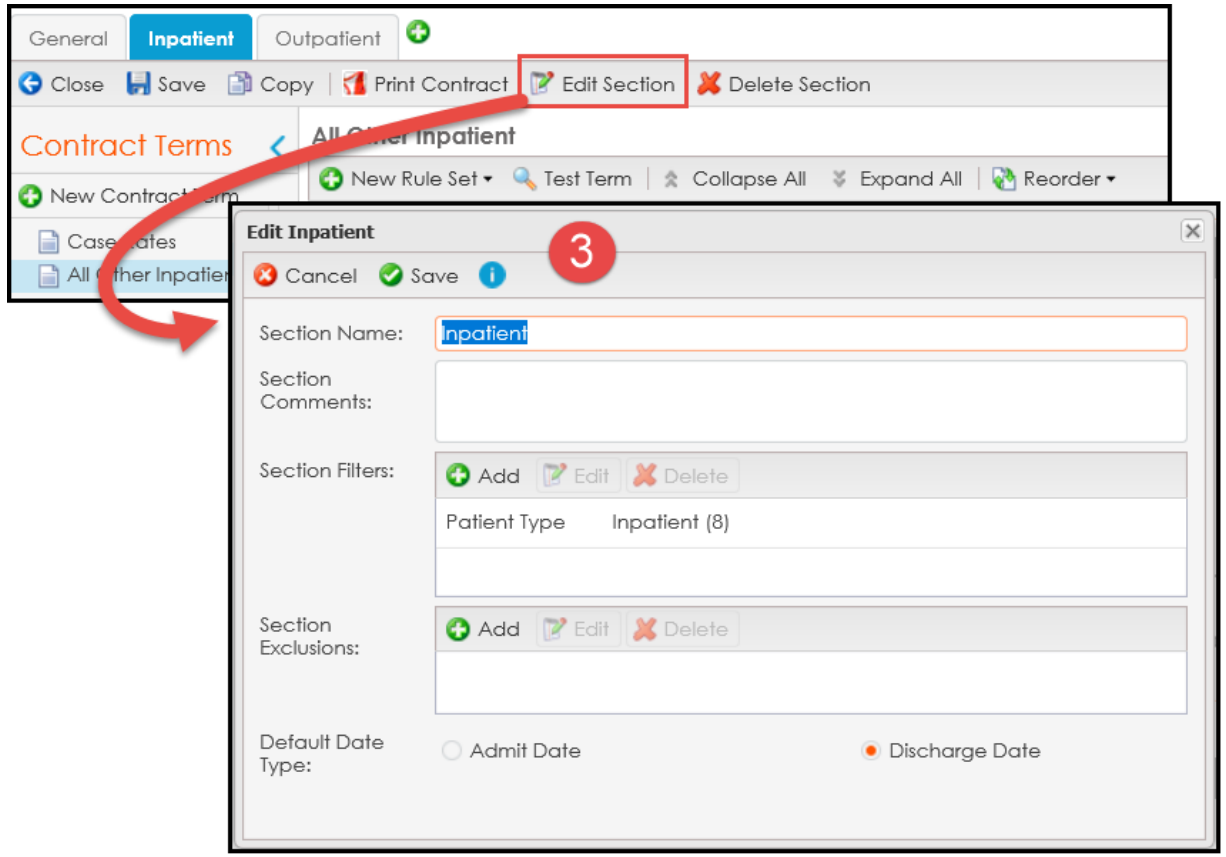
Strata Decision TECHNOLOGY

2. Section Filters: Left to Right

- As the encounter is moving left to right, the system is looking at the section filter information found when clicking **Edit Section**.

3. Section Filters

- Section Filters
  - Patient Type
  - Facility
- Default Date Type



© Strata Decision Technology

Order of Operations: Contract Terms

4. Contract Terms

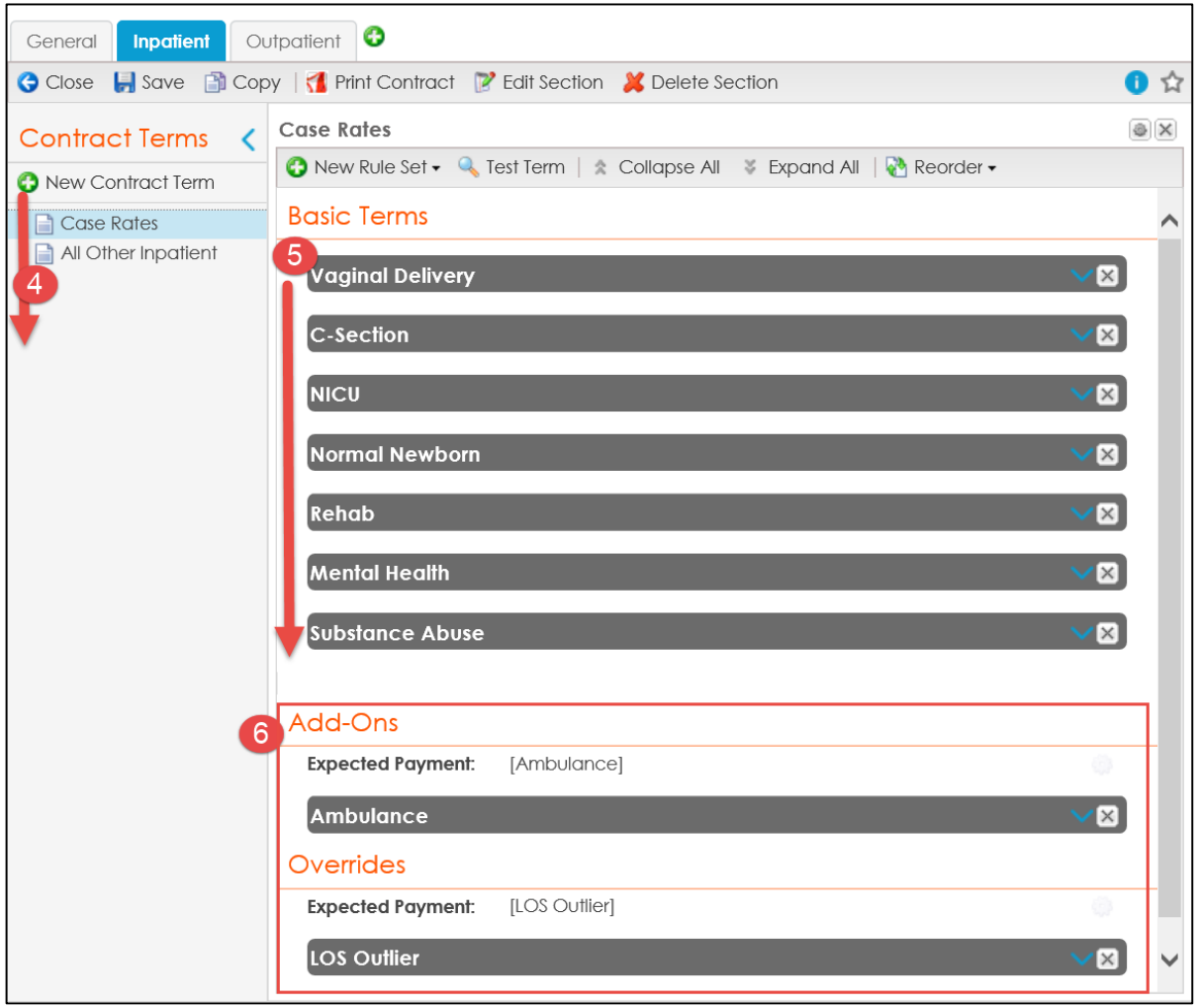
- Top to Bottom
- Qualify for only ONE Contract Term
- Best Practice Advice:
  - Catch-all Rule should be included as the last basic rule in the last contract term
  - Rule of Specificity (most specific to most general)

5. Basic Terms

- Top to Bottom
- Qualify for only ONE Basic Term within the Contract Term

6. Add-Ons and Overrides in the following order

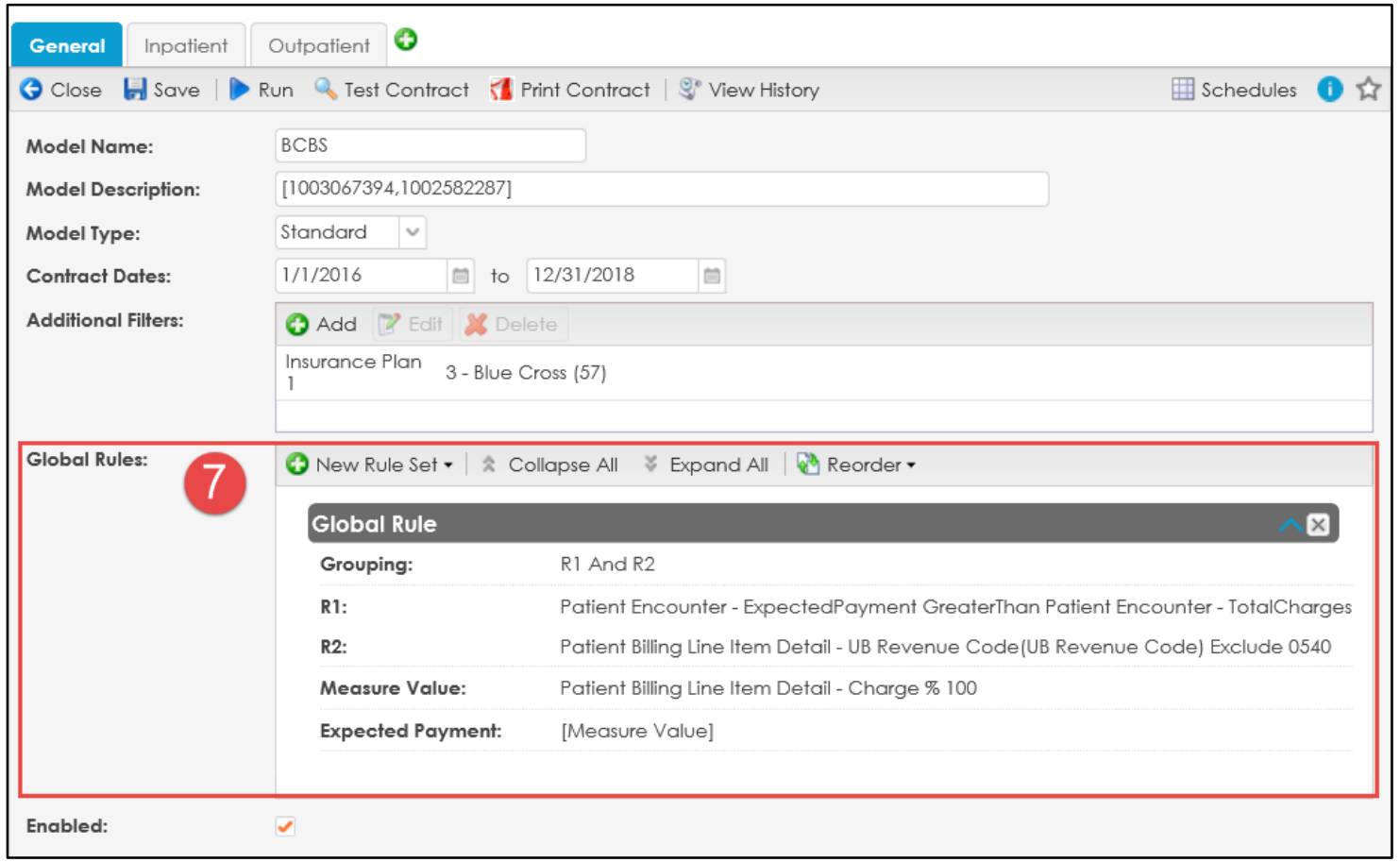
- Can qualify for multiple Add-Ons and Overrides within the Contract Term



© Strata Decision Technology

Order of Operations: Global Rules

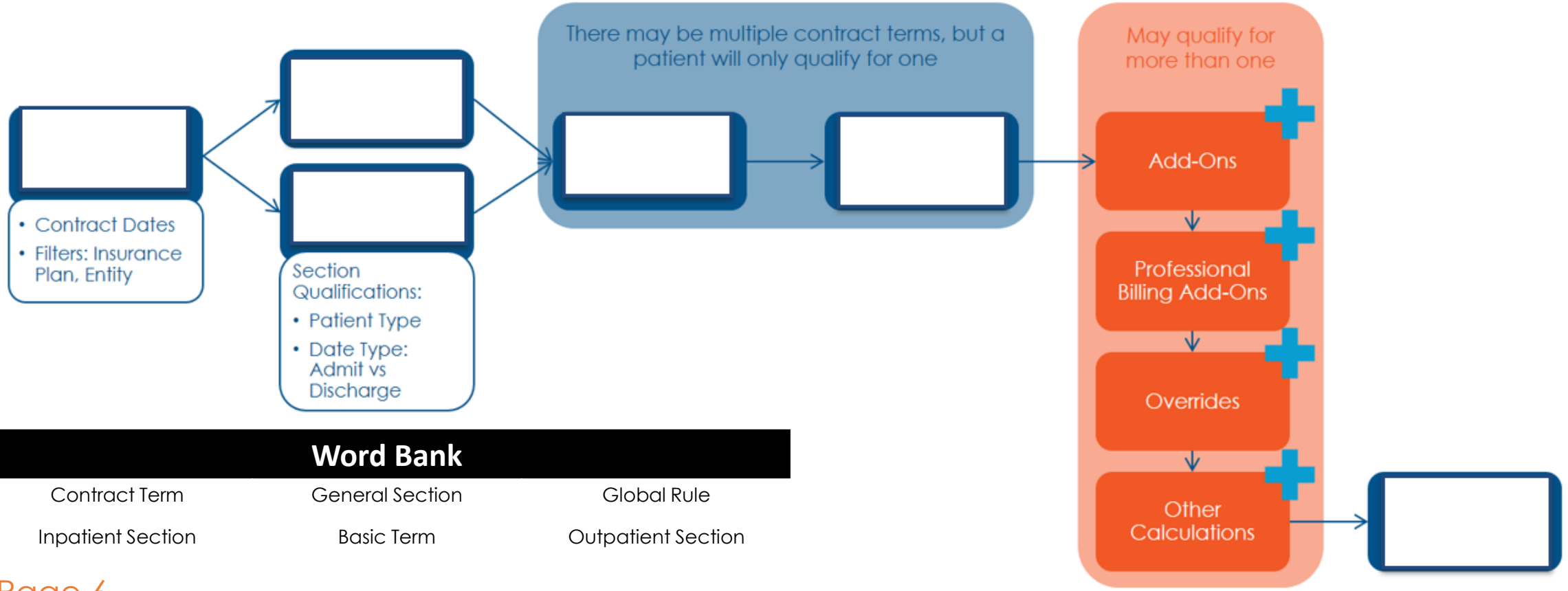
7. Global Rules
   - The encounter will evaluate against the Global Rules on the General tab



© Strata Decision Technology

Write it Down

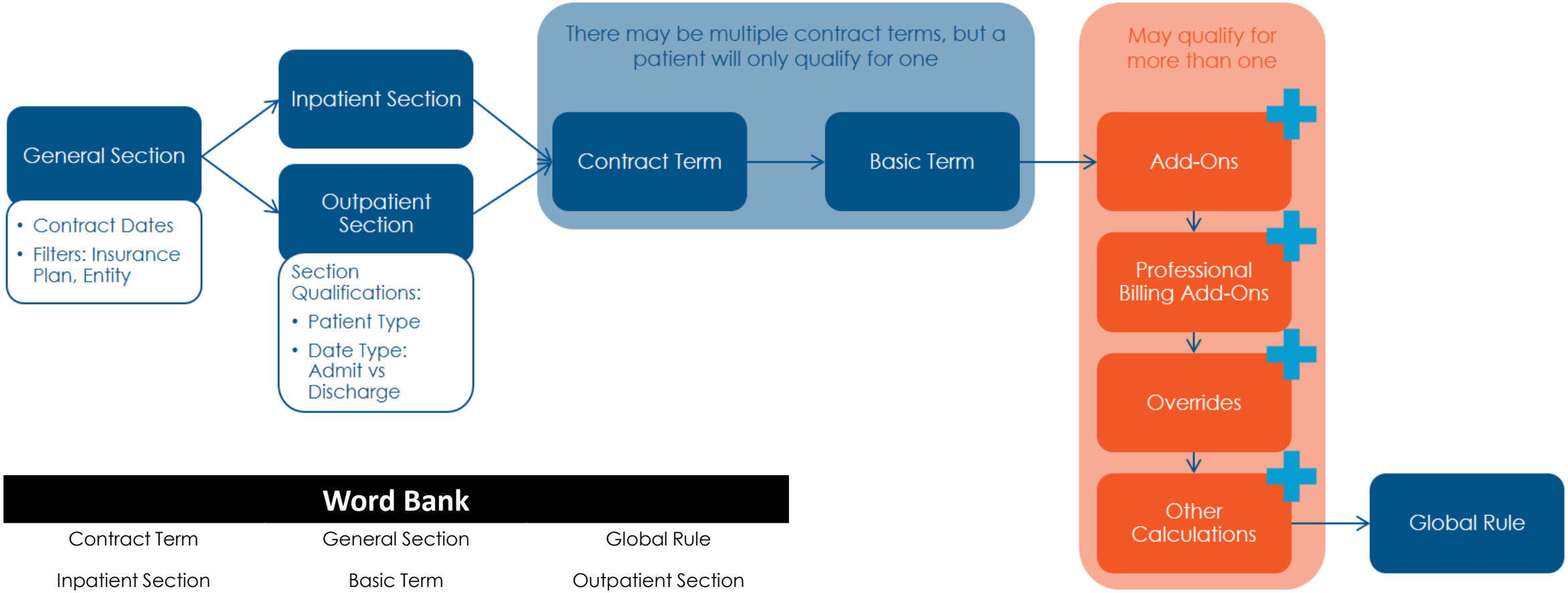
Directions: Use the Word Bank to complete the diagram in your guide



Word Bank		
Contract Term	General Section	Global Rule
Inpatient Section	Basic Term	Outpatient Section

© Strata Decision Technology

Write it Down: Answer Key



Word Bank		
Contract Term	General Section	Global Rule
Inpatient Section	Basic Term	Outpatient Section

© Strata Decision Technology

Section Filters in Contract Analytics: Troubleshooting

Section Filter Issue

- Issue:
  - The encounter you have selected qualifies correctly for the contract, but is not qualifying for the Inpatient section as expected.

- Next Step?
  - As the Contract System Administrator, what is your next step after validating the order of operations?

© Strata Decision Technology

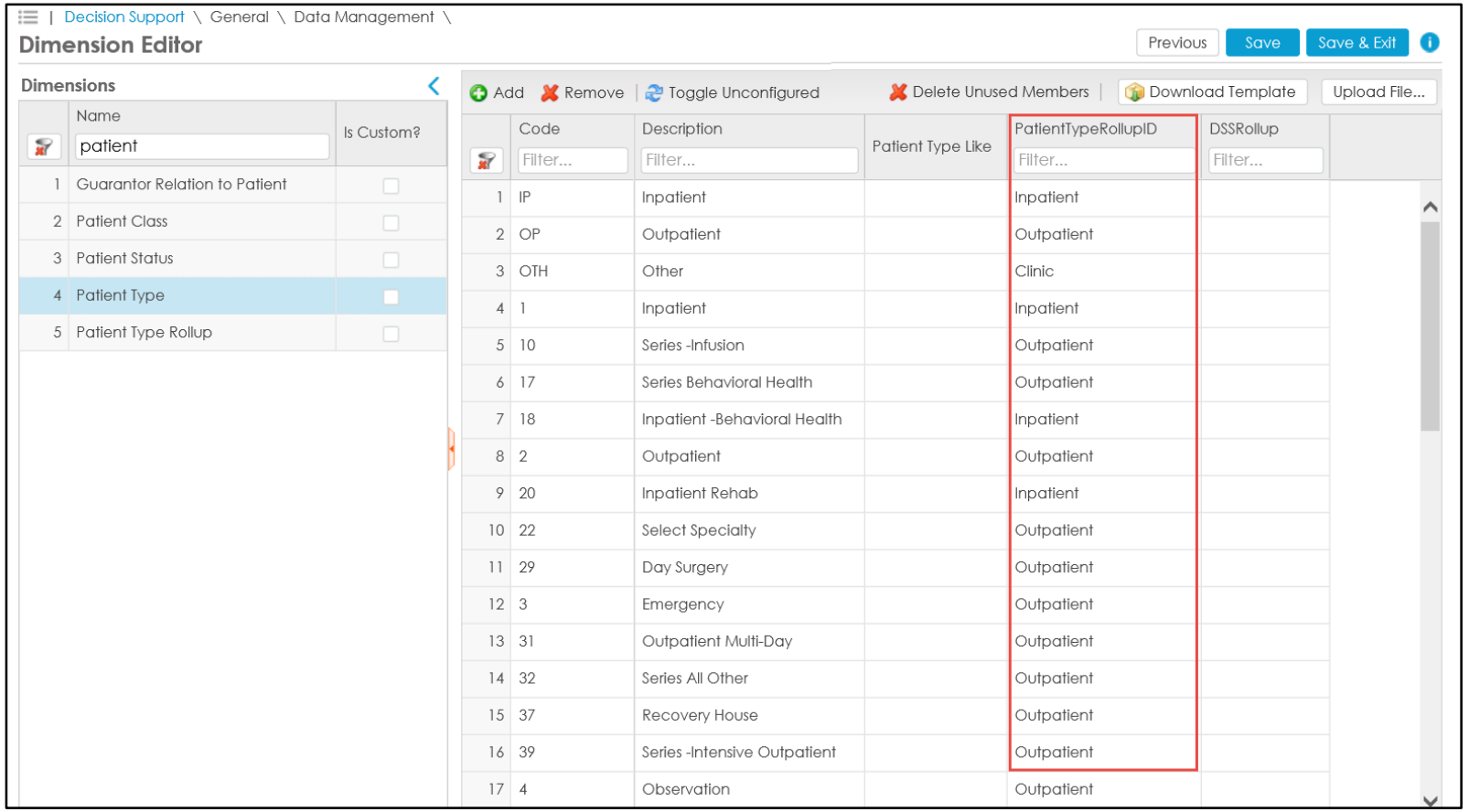
Section Filter Scenario

- Issue:
  - The encounter you have selected qualifies correctly for the contract, but is not qualifying for the Inpatient section as expected.
- Next Step:
  - As the System Administrator, your next step should be to review the Section Filter of each tab.
    - Look at the **Patient Types** defined in the **Section Filters** of the **Section Edit** activity.
    - Look at the **Entity**, **Insurance Plans**, and **Source System** defined in the information on the **General Tab.**

© Strata Decision Technology

Section Filters: Patient Type Roll-Ups Best Practice

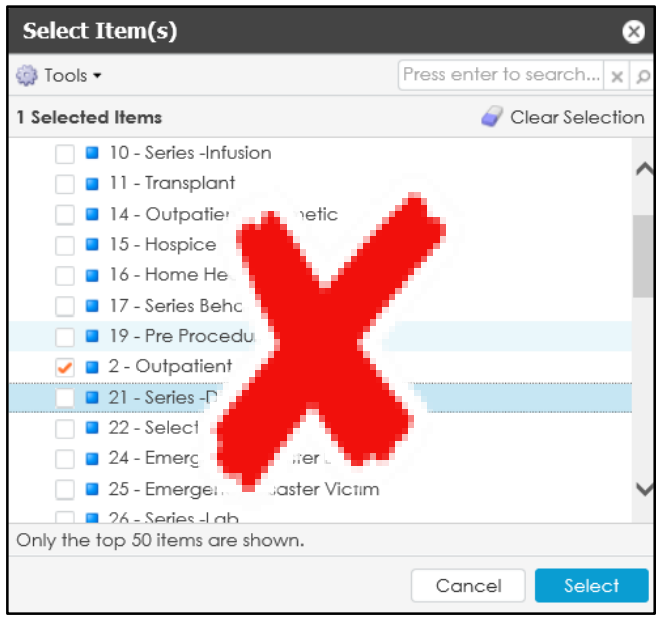
- Increase Accuracy
  - Less Prone to Mistakes
- Complete List of Patient Types
- Time Saving
- Simpler Onboarding and transition of job responsibilities

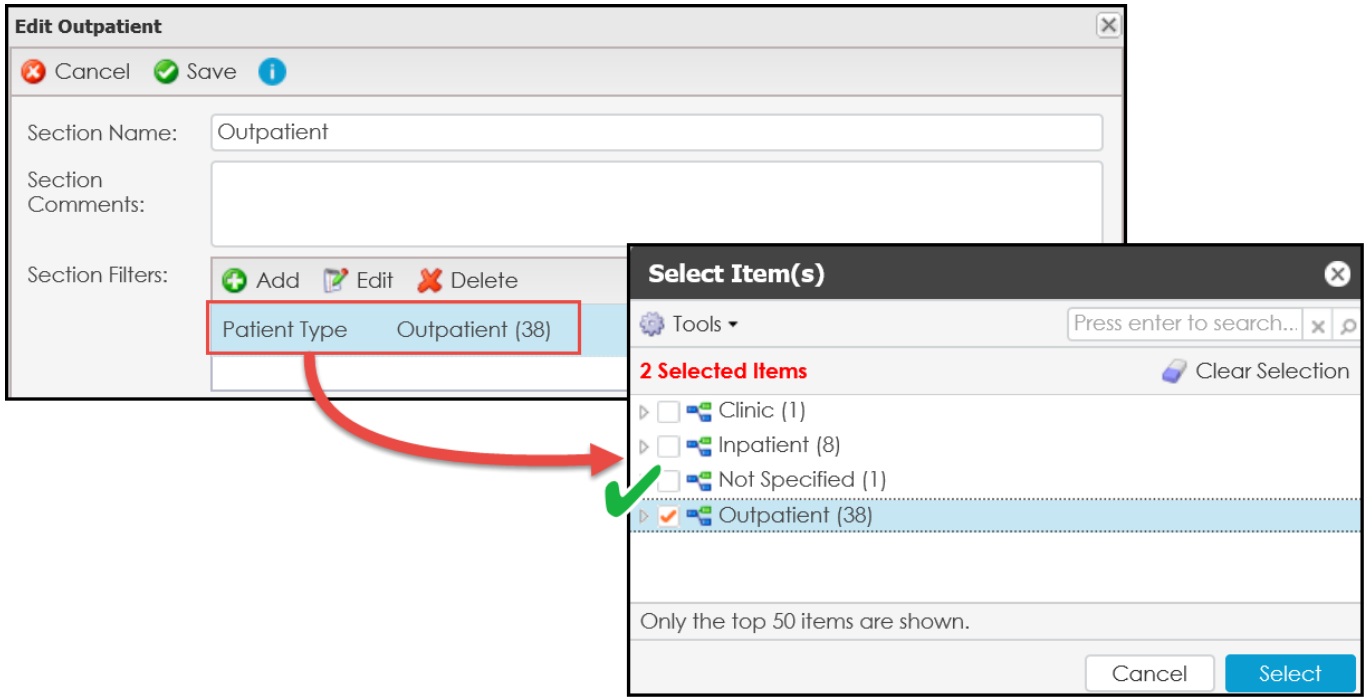


© Strata Decision Technology

Section Filters: Patient Type Roll-Ups – Best Practice

It is important to always select the Roll-Up and not the individual Patient Types when adding your section filter

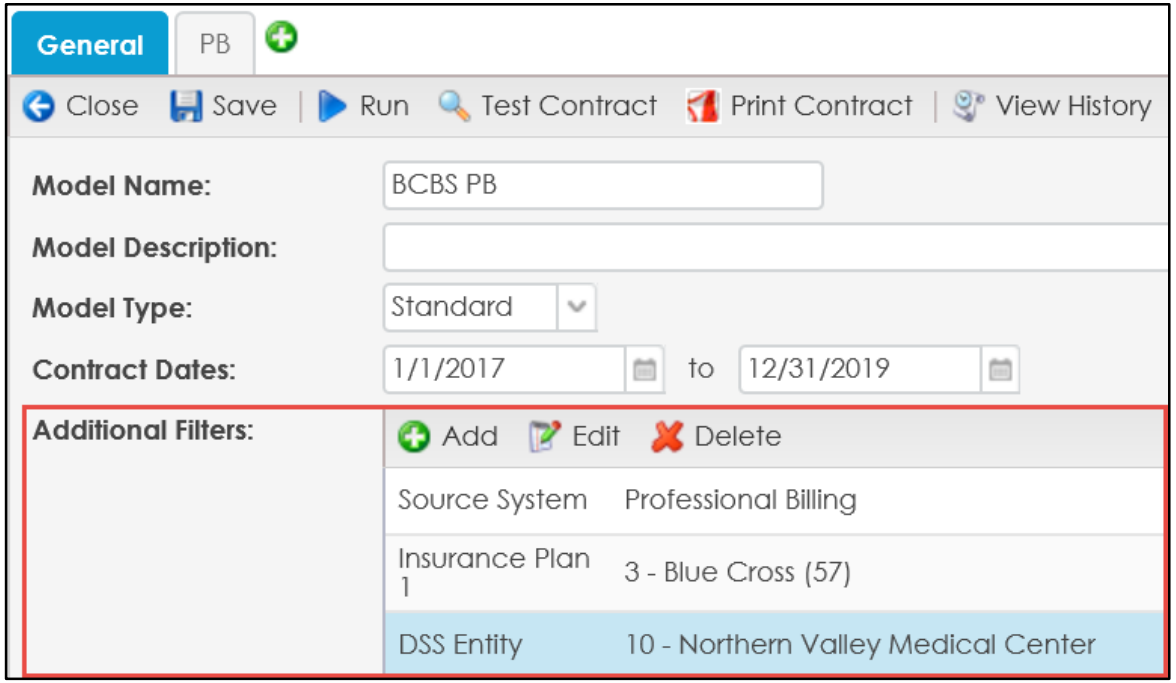




© Strata Decision Technology

Common Global Filters

- Source System
- Insurance Plan/ Contract Grouping
- Entity

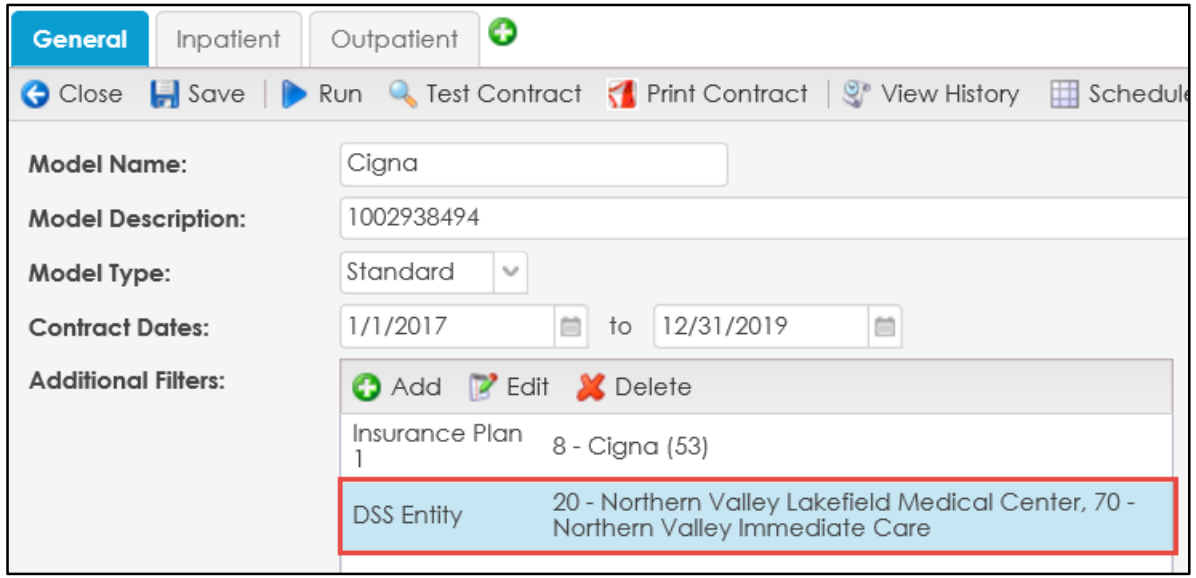


© Strata Decision Technology

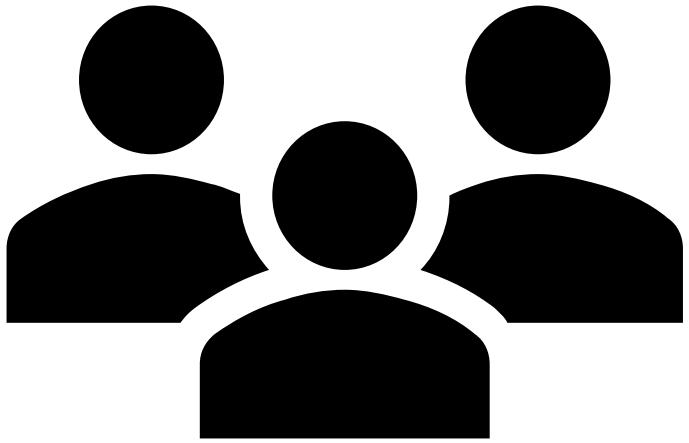
Global Filters: Entity

Add an Entity Section Filter

1. Navigate to the **General** tab of a Contract
2. Click **Add** in the **Additional Filters** section
3. Select **DSS Entity**
4. Select the appropriate entity or facilities and click **Select**.



© Strata Decision Technology



In-Class Scenario: Troubleshooting Section Filters in a Contract

Page 6

© Strata Decision Technology

Rule Sets in Contract Analytics: Troubleshooting

Why isn't the encounter qualifying for the rule?

- Issue:
  - The encounter I selected is not qualifying for the rule within my Basic Term?
- What we have confirmed so far:
  - Order of Operations is Correct
  - Section Filters are Correct
- Next Step:
  - As the Contract Administrator, what is your next step?

© Strata Decision Technology

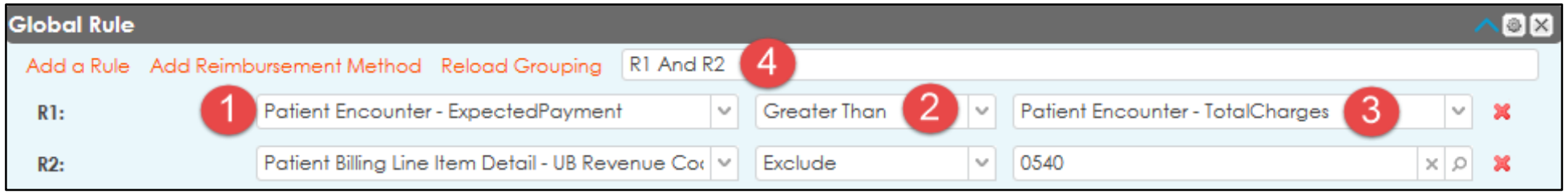
Why isn't the encounter qualifying for the rule?

- Issue:
  - The encounter I selected is not qualifying for the rule within my Basic Term
- What we have confirmed so far:
  - Order of Operations is Correct
  - Section Filters are Correct
- Next Step:
  - As the Contract Administrator, look at the rules you have created in your Basic Terms

© Strata Decision Technology

Troubleshooting Contract Rules: Elements of a Rule

1. Validate that the correct **Data Element** (Attribute within the Dimension) was selected
2. Validate that the correct **Operator** was selected
3. Validate that the correct **Value** was selected
4. Validate that the **Boolean**(Evaluation) **Logic** is set up correctly



© Strata Decision Technology

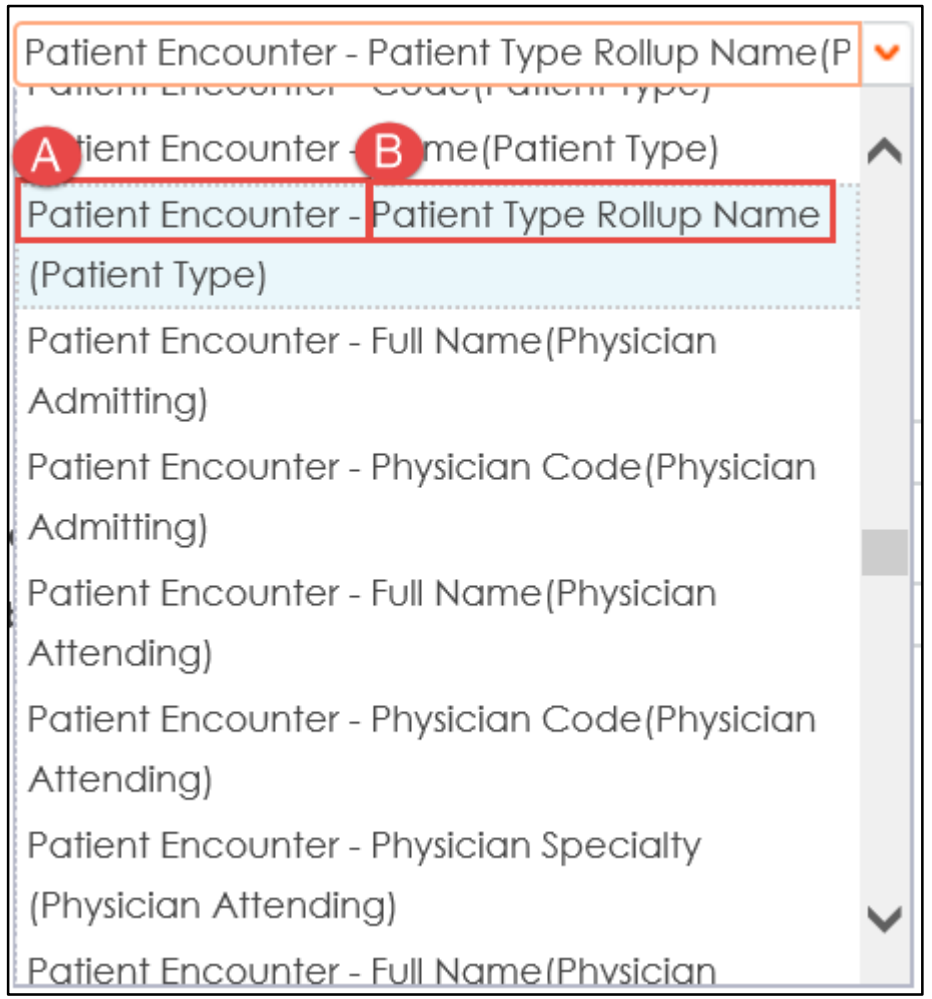
Rule Building: Data Element

Data is stored at different levels

A. Indicates the level data is stored at
B. Indicates the narrowed piece of data the system will test an encounter against

It is important to ask yourself first, "At what level is the data that I am looking for?"

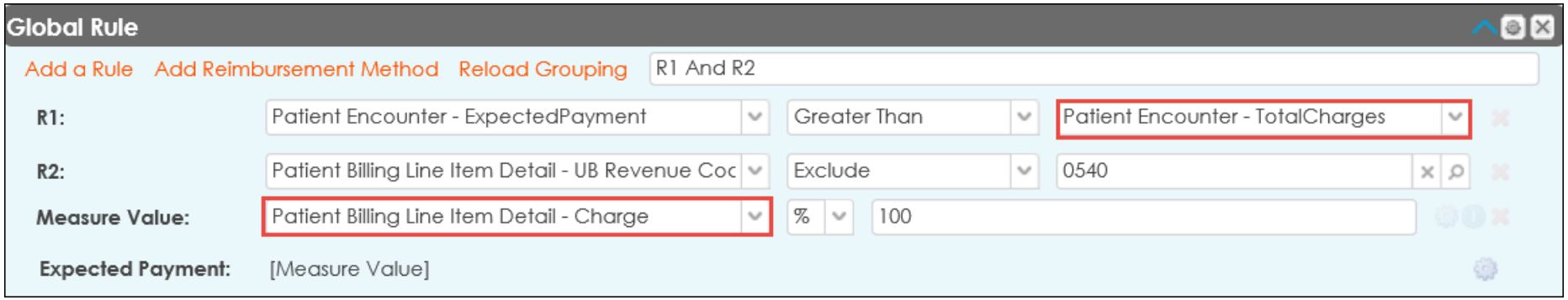
- Is my data stored at the encounter level or billing line level ?



© Strata Decision Technology

Troubleshooting the Data Element:
Select the Correct Dimension - Attribute: Total Charges vs Charges

	Total Charges	Charge
Dimension the Attribute is located in	Patient Encounter	Patient Billing Line Item Detail
Use Case	Case Rate for entire encounter	Percent of Charge for a charge associated with a CPT (ie Implants, or high cost drugs)



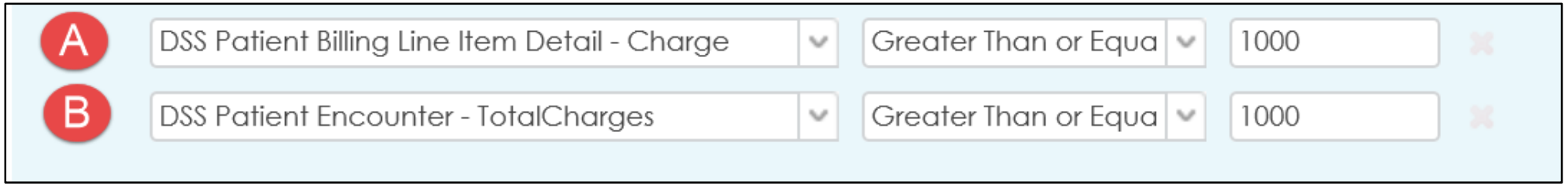
© Strata Decision Technology

Rule Building: Data Element

What Qualifier are you looking for when selecting a data element?

A. In rule A, you are looking for a single charge to be greater than or equal to $1,000

B. In rule B, you are looking for the total charges for the entire encounter to be greater than or equal to $1000



© Strata Decision Technology

Troubleshoot the Operator: With vs And

	With	And
Description	Specify a value for which both the first and second conditions are true for the same line item.	Specify a value for which both the first condition and the second condition are true.
Comparison	one-to-one comparison	one-to-many comparison
Example Rule	CPT EQUAL 67028 WITH modifier 50	CPT EQUAL 67028 AND modifier 50
System Evaluation	The system finds only encounters with modifier 50 attached to the CPT 67028 charge line.	The system finds any account with CPT 67028 and modifier 50 present for any charge line on the encounter.

© Strata Decision Technology

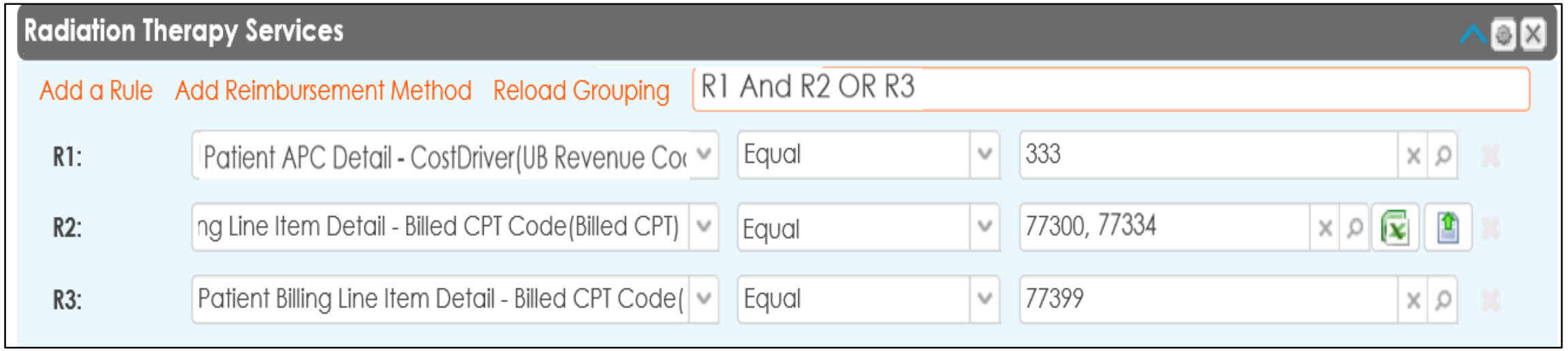
On Your Own: Rule Sets in Contract Analytics

© Strata Decision Technology

Rule Sets in Contract Analytics: Part 1

1. Circle the sections of the rule that were built incorrectly

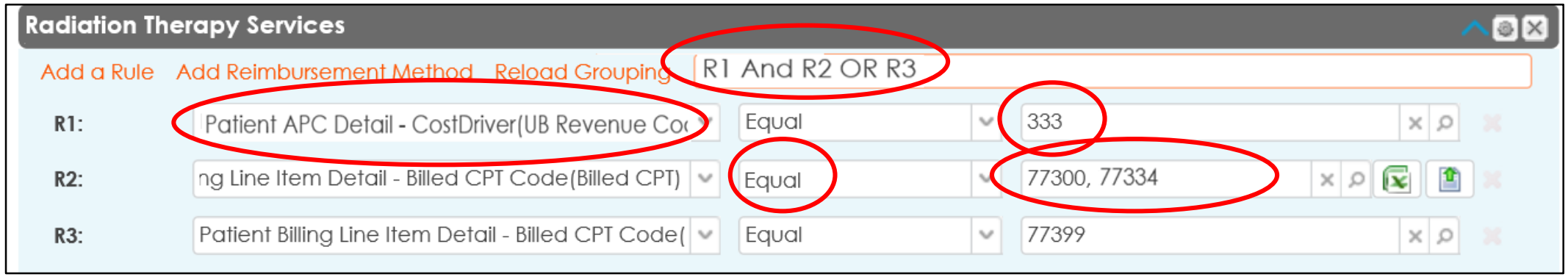
Radiation Therapy Services	Revenue Code 333 and CPT Code 77300-77334, 77399	40.2 % Reduction from Billed Charges



© Strata Decision Technology

Rule Sets in Contract Analytics: Review Part 1

1. Circle the sections of the rule that were built incorrectly

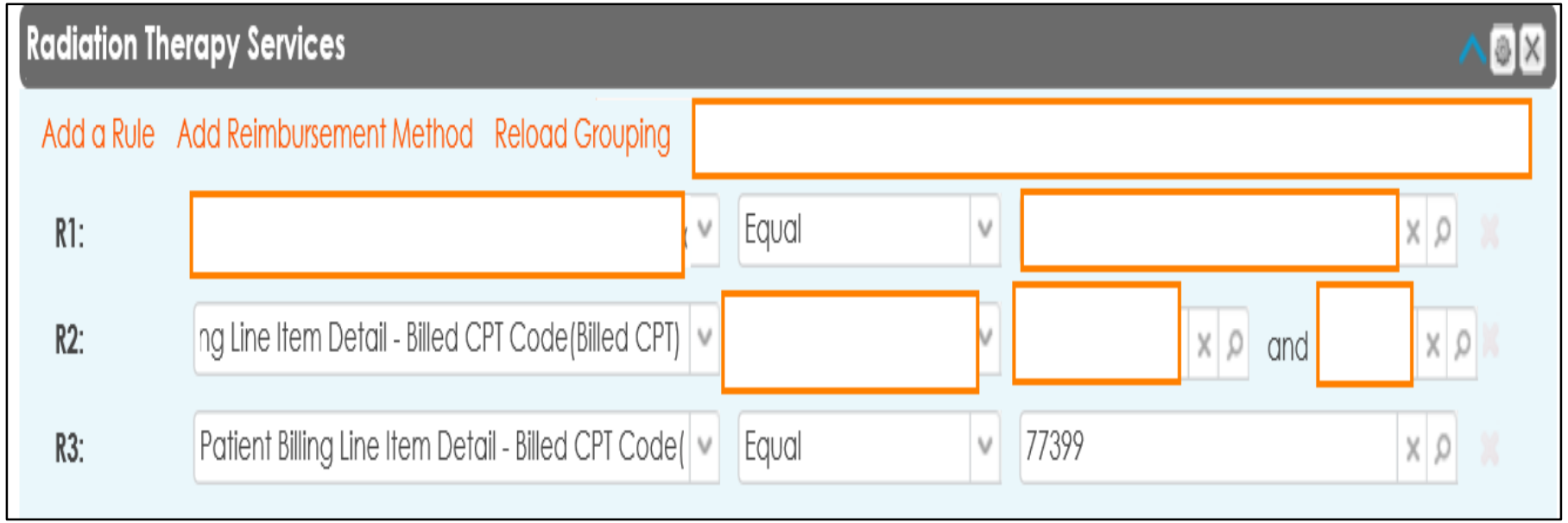


© Strata Decision Technology

Rule Sets in Contract Analytics: Part 2

2. Rewrite the rule correctly based on the provided information.

Radiation Therapy Services	Revenue Code 333 and CPT Code 77300-77334, 77399	40.2 % Reduction from Billed Charges

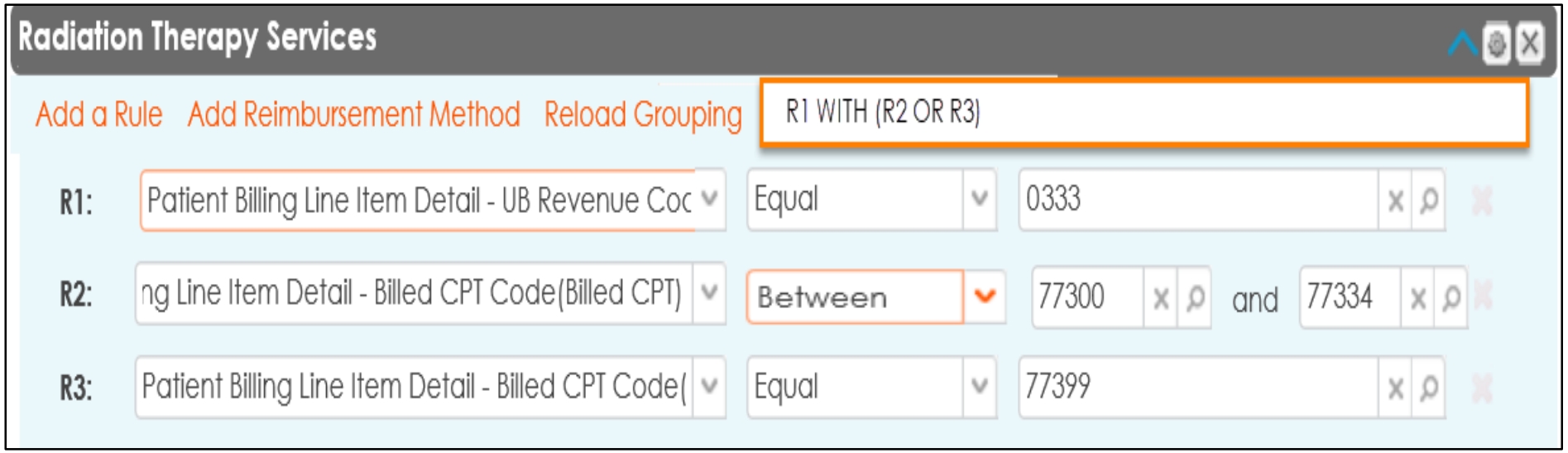


© Strata Decision Technology

Rule Sets in Contract Analytics: Review Part 2

2. Rewrite the rule correctly based on the provided information.

Radiation Therapy Services	Revenue Code 333 and CPT Code 77300-77334, 77399	40.2 % Reduction from Billed Charges



© Strata Decision Technology

Additional Troubleshooting Support

Additional Troubleshooting Support

- General Troubleshooting Steps
- Testing a theory using a Copy and **What If** model
- When do I use **Test Term** versus **Test Contract**?

© Strata Decision Technology

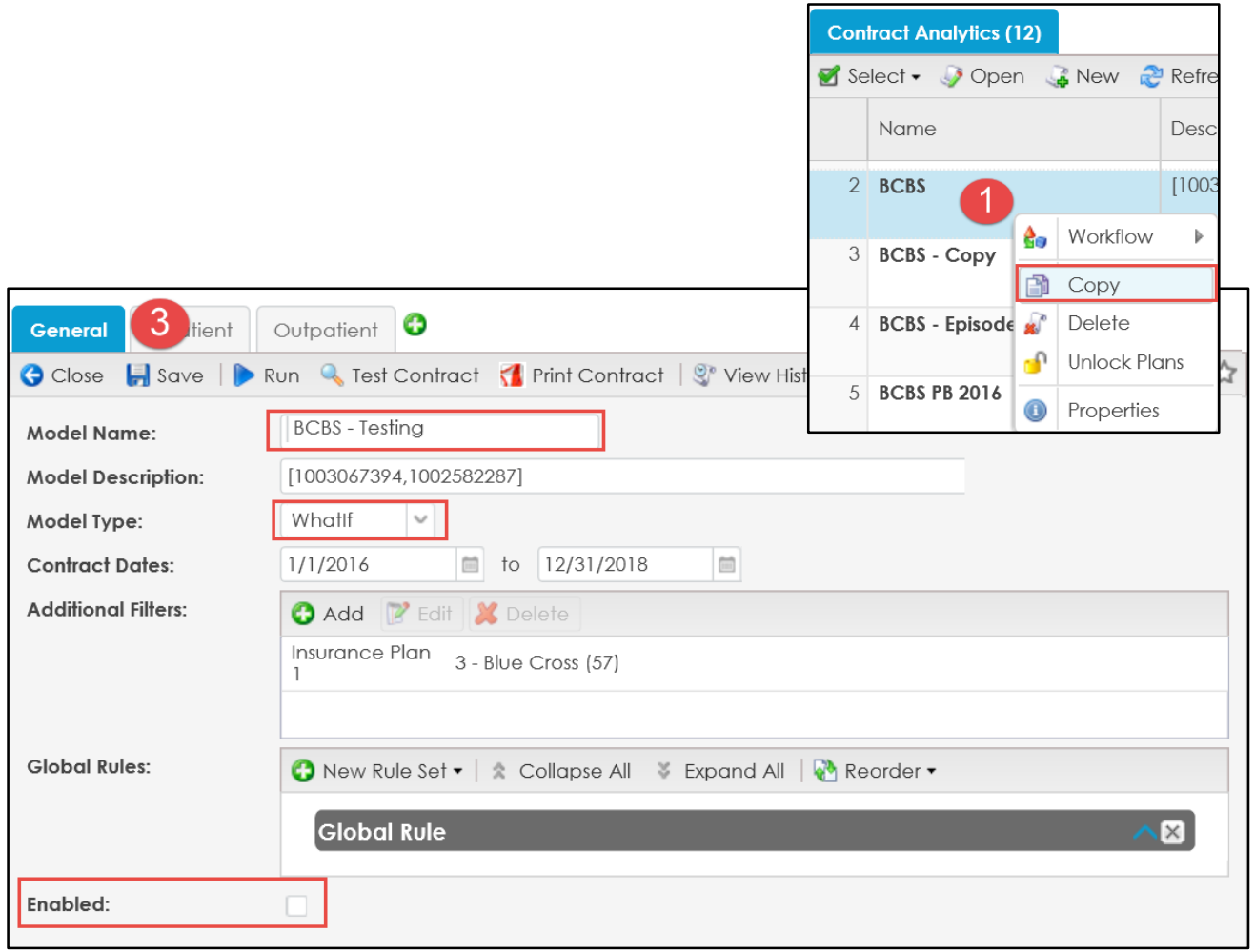
General Troubleshooting Steps

1. Identify the Problem
   - Gather details and examples of the problem
2. Establish a Theory of Probable Cause
   - Why does the problem exist?
   - What steps need to be taken to solve it?
3. Test the Theory
   - Use **Test Contract**, **Test Term**, and **What If** models to test your theory
   - Copying a contract to test is a great way to ensure that your production contracts stay in place until you are able to identify the issue
4. Plan and Implement a Solution
   - Produce a step-by-step process and ensure you will not break anything else
5. Verify Full Functionality
   - Validate and Test to ensure the problem is solved
6. Document, Document, Document!
   - An issue is not resolved until you have documented everything

© Strata Decision Technology

Test The Theory Using **What If** Models

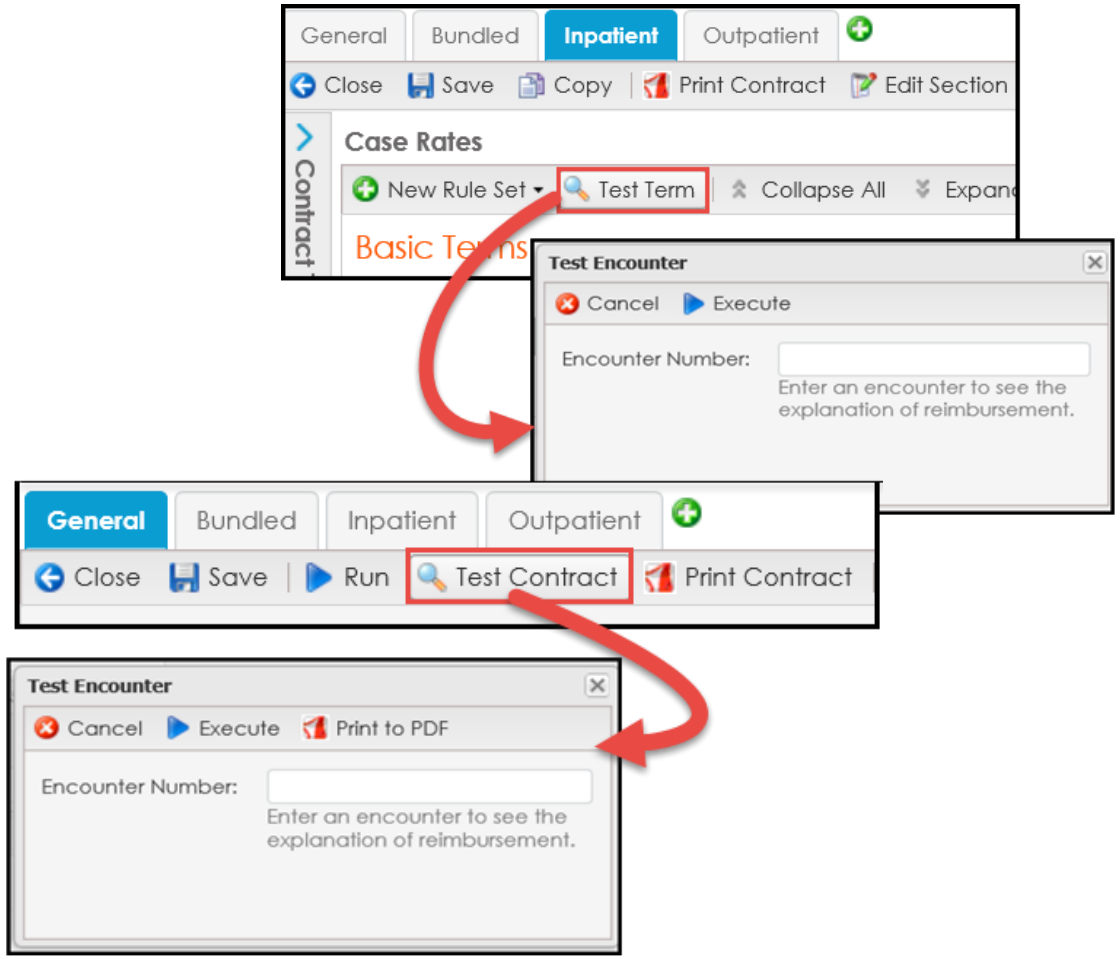
1. Copy the Contract
2. Open your Copied Contract
3. Update Information on the General Tab:
   a) Model Name
   b) Model Type: What If
   c) Uncheck the Enable box
4. After copying the contract model, test your theory format



© Strata Decision Technology

Test the Theory & Verify Full Functionality

	Test Contract	Test Term
Description	Provides full picture of what an encounter qualifies for Click **Print to PDF** to understand the math behind the reimbursement	Test the set up of your rules focusing on the basic terms, add-ons, and overrides.
Use Case	Testing an entire contract against an encounter	Testing a specific basic term against an encounter
Respects Order of Operations?	Yes	No

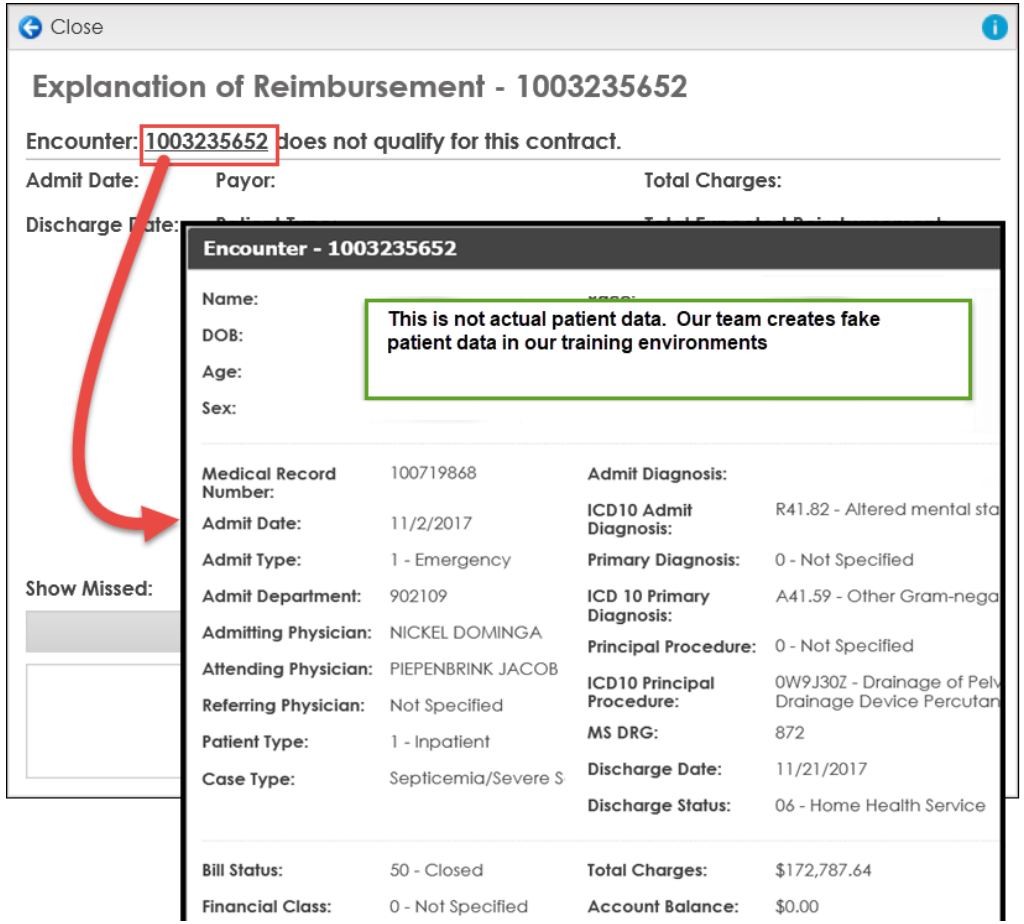


© Strata Decision Technology

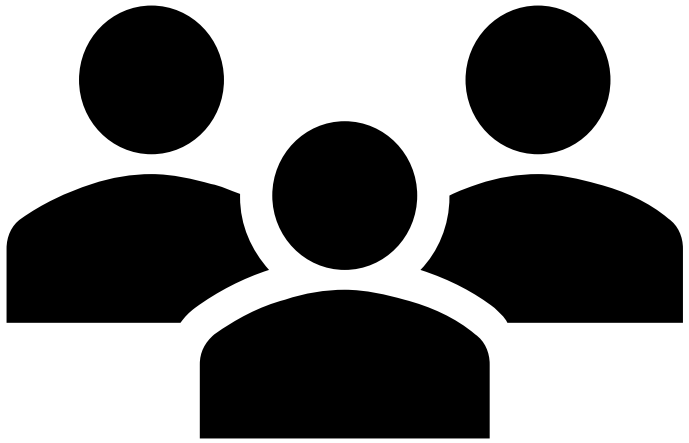
Test Contract: Encounter Information

In order to see information about the contract, click the encounter number to see more information.

- Patient Demographic Information
- Admit/Discharge Date
- Patient Type
- Diagnosis and Charge Codes
- Billing Information



© Strata Decision Technology



In-Class Scenario: Additional Troubleshooting Support

Review the scenarios provided to determine if you would use **Test Contract** or **Test Term**

Page 8

© Strata Decision Technology

In-Class Scenario: One

1. You just built a complicated rule and want to ensure it was built correctly.

Test Contract

Test Term

© Strata Decision Technology

In-Class Scenario: Answer

1. You just built a complicated rule and want to insure it was built correctly.

Test Contract

Test Term

Use Test Term to ensure your rule is built correctly. Find an encounter that qualifies as true and one that qualifies as false to ensure accuracy.

© Strata Decision Technology

In-Class Scenario: Two

2. You have just finished contract negotiations for the new year and have updated your sections. You want to ensure that you have built the contract correctly. You have two encounters that should qualify for the catch all rule of the inpatient section, one encounter that should qualify for the rehab basic term on your outpatient section, and one encounter that should not qualify for the contract.

Test Contract

Test Term

© Strata Decision Technology

In-Class Scenario: Answer

2. You have just finished contract negotiations for the new year and have updated your sections. You want to ensure that you have built the contract correctly. You have two encounters that should qualify for the catch all rule of the inpatient section, one encounter that should qualify for the rehab basic term on your outpatient section, and one encounter that should not qualify for the contract.

Test Contract

Test Term

Use **Test Contract** to ensure accuracy of your complete contract build. You should always validate with encounters that will qualify as true and false.

© Strata Decision Technology

In-Class Scenario: Three

3. An encounter is qualifying for your contract, but the reimbursement is not correct. You need to figure out why.

Test Contract

Test Term

© Strata Decision Technology

In-Class Scenario: Answer

3. An encounter is qualifying for your contract, but the reimbursement is not correct. You need to figure out why.

Test Contract

Test Term

Use **Test Contract** and **Print to PDF** within Test Contract to understand which term the encounter qualified for and the math behind the reimbursement.

© Strata Decision Technology

On Your Own: Troubleshooting Activities

On Your Own:
Based on what we have learned in class today, Troubleshoot the following scenarios in the system.

© Strata Decision Technology

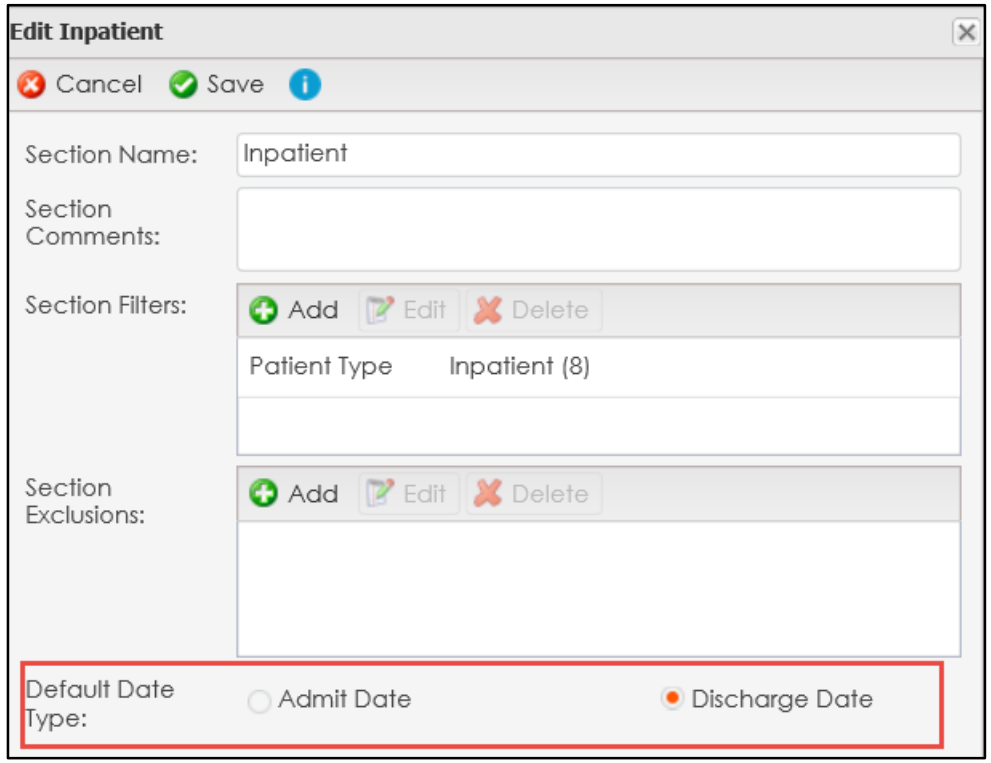
Troubleshooting On Your Own: Scenario A

- **Scenario**: An encounter is not qualifying for my BCBS – Troubleshooting A contract as expected. Use the skills you have learned in class today to identify and correct the issue within the contract.
- **Next Step**: Answer the two questions below
    1. What is the Issue?
    2. Describe the steps you took to resolve the issue.
- **Scenario Information**:
    - Contract: BCBS – Troubleshooting A
    - Encounter Number: 1003235652
    - The contract has Inpatient and Outpatient sections that look to the discharge dates for qualification.
    - The section filter for Inpatient should look to the Inpatient Rollup.
    - There should be two contract terms in the Inpatient section with the Catch All Rule being last. The global rule should refer to the total charges for the encounter.

© Strata Decision Technology

In Class Review: Scenario A

Issue: Admit Date radio button was selected



Resolution:

1. Select **Discharge Date** for **Default Date Type**
   - Refer to the screenshot
2. Click **Save**
3. Navigate to the **General** Tab and click **Test Contract** to confirm the encounter qualifies as expected now

© Strata Decision Technology

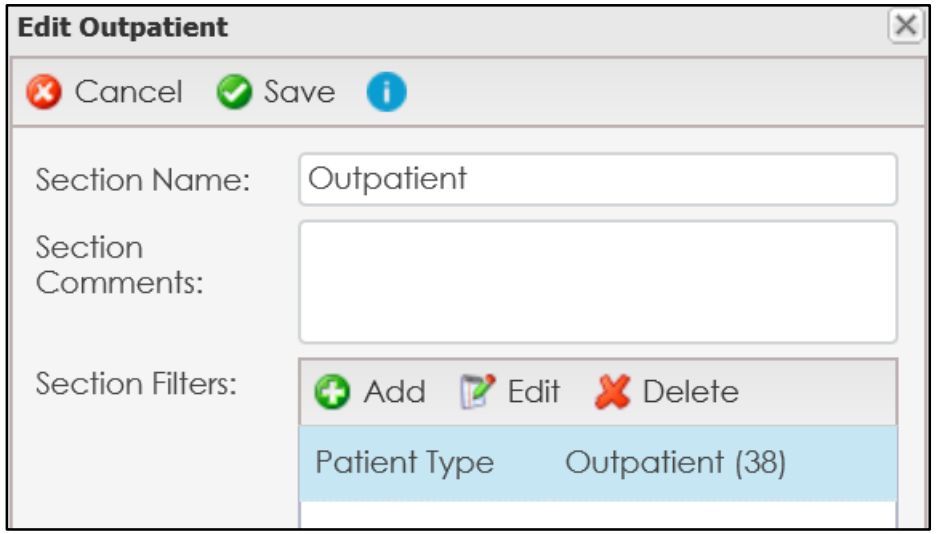
Troubleshooting On Your Own: Scenario B

- **Scenario**: An encounter is not qualifying for my BCBS – Troubleshooting A contract as expected. Use the skills you have learned in class today to identify and correct the issue within the contract.
- **Next Step**: Answer the two questions below
    1. What is the Issue?
    2. Describe the steps you took to resolve the issue.
- **Scenario Information**:
    - Contract: Cigna – Troubleshooting B
    - Encounter Number: 1002938494
    - The contract has Inpatient and Outpatient sections that look to the discharge dates for qualification.
    - The Section Filter for the Outpatient section should look to the Outpatient Rollup.
    - There should be two contract terms in the Inpatient section with the Catch All Rule being last. The global rule should refer to the total charges for the encounter.

© Strata Decision Technology

In Class Review: Scenario B

Issue: The Outpatient Rollup was not selected in the Patient Type Section Filter



Resolution:

1. Single-click the Patient Type
2. Click **Edit**
3. Expand the Outpatient Rollup
4. Deselect the checked patient types
5. Check the box next to the Outpatient (38)
6. Click **Select**
7. Click **Save**

© Strata Decision Technology

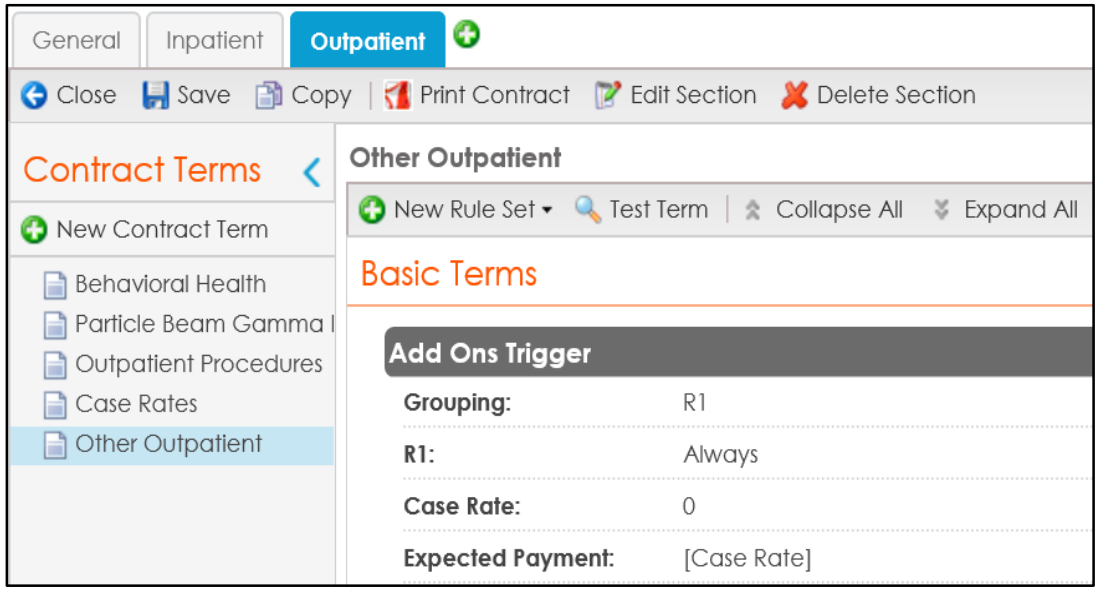
Troubleshooting On Your Own: Scenario C

- **Scenario**: A team member has finished creating X contract based on contract negotiations. As she is testing multiple encounters, she is realizing that all the Behavioral Health outpatient encounters are incorrectly being calculated by a case rate.
- **Next Step**: Answer the two questions below
    1. What is the Issue?
    2. Describe the steps you took to resolve the issue.
- **Scenario Information**:
    - Contract: UHC – Troubleshooting C
    - Encounter Number: 1002410137
    - The encounter should be qualifying for the Behavioral Health outpatient contract term.

© Strata Decision Technology

In Class Review: Scenario C

Issue: The Other Outpatient Contract Term containing the Always Basic Term was listed first in the Outpatient Section.



Resolution:

1. Test Contract and use Print to PDF to the rule that it is qualifying for
2. You see it is qualifying for the always rule
3. You need to move the always rule to be last

© Strata Decision Technology

Assessment: Contract Analytics Troubleshooting

Directions

With your partner:

1. Review the screenshots and identify the error in each.
2. Write the answer below each screenshot
3. We will review these as a group in 10 minutes

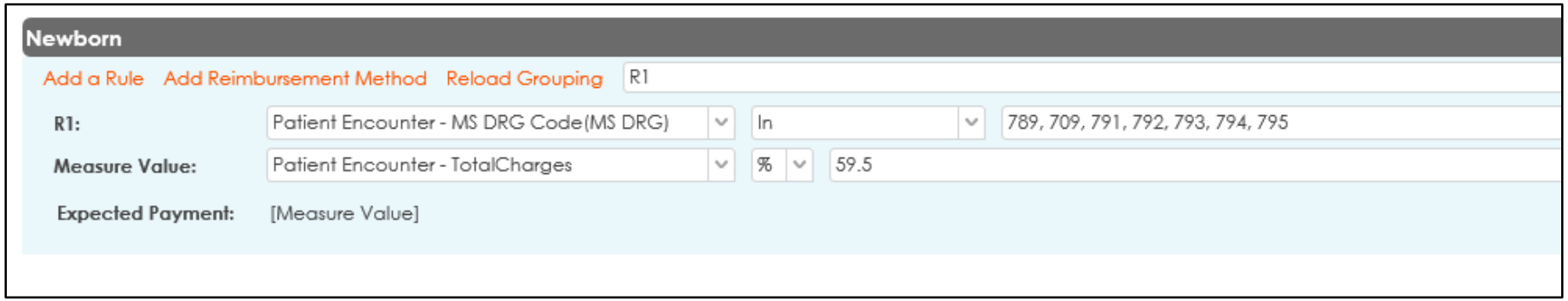
© Strata Decision Technology

1. Teacher Demo

Common Contract Issues

Strata Decision TECHNOLOGY

What is wrong with the screenshot below?



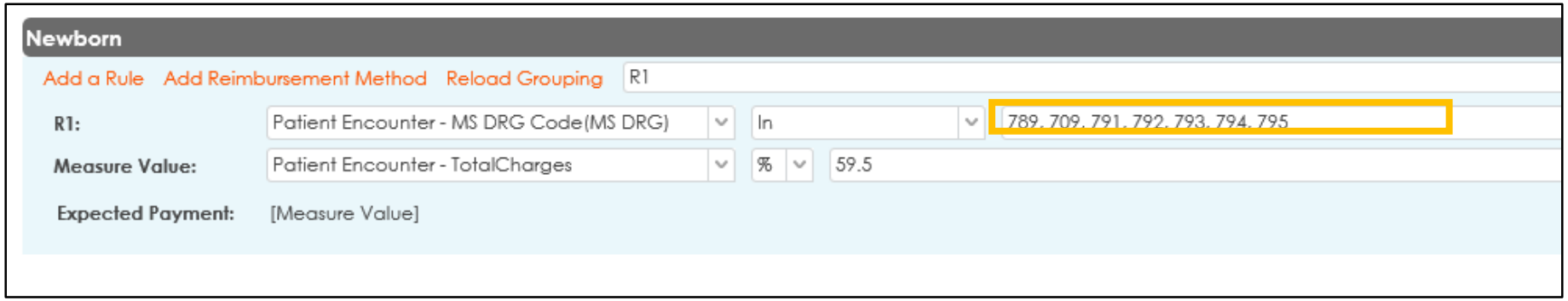
© Strata Decision Technology

1. Typos in Codes or Rates (Answer)

Common Contract Issues

Strata Decision TECHNOLOGY

- Issue: 709 is not a newborn MS DRG Code
- Next Step: Follow-up with team to see if 709 should be 790 based on the other MS DRG Codes.

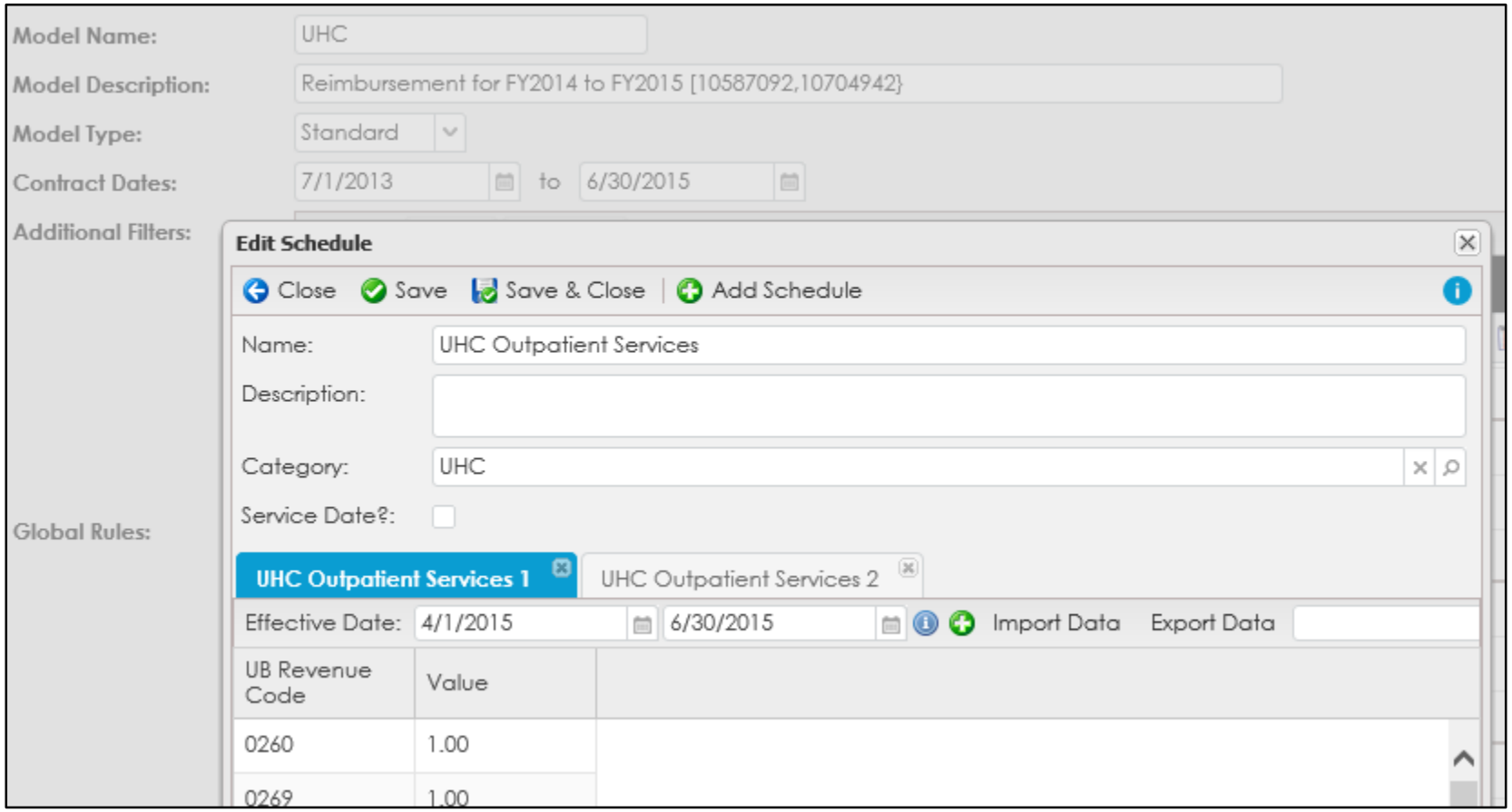


© Strata Decision Technology

2. What is the Issue?

Common Contract Issues

Strata Decision TECHNOLOGY



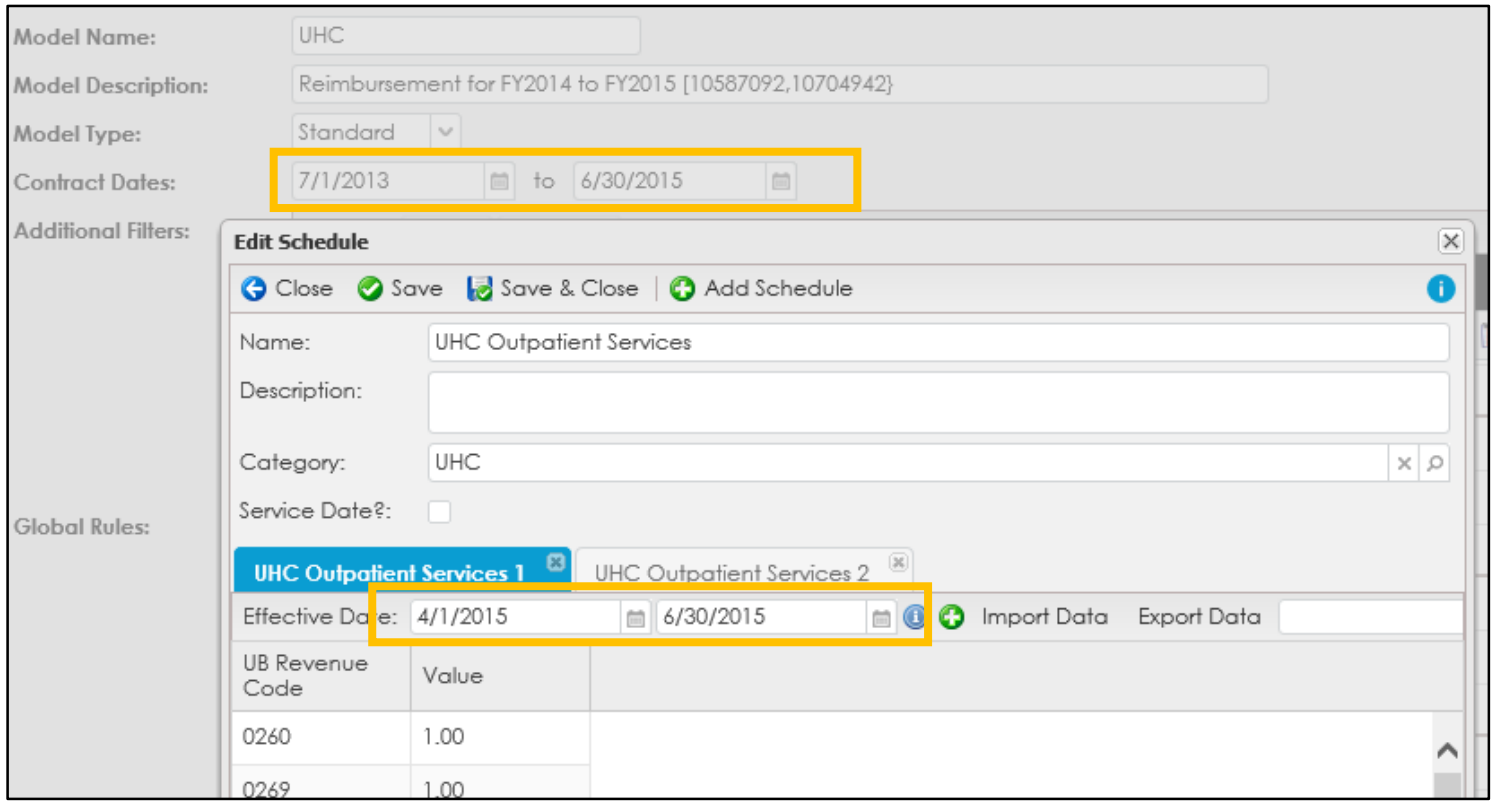
© Strata Decision Technology

2. Incorrect Schedule Dates (Answer)

Common Contract Issues

Strata Decision TECHNOLOGY

- Issue: The dates are inconsistent between the contract and schedule.
- Next Step: Follow-up with team to identify the correct fee schedule with the correct effective dates.

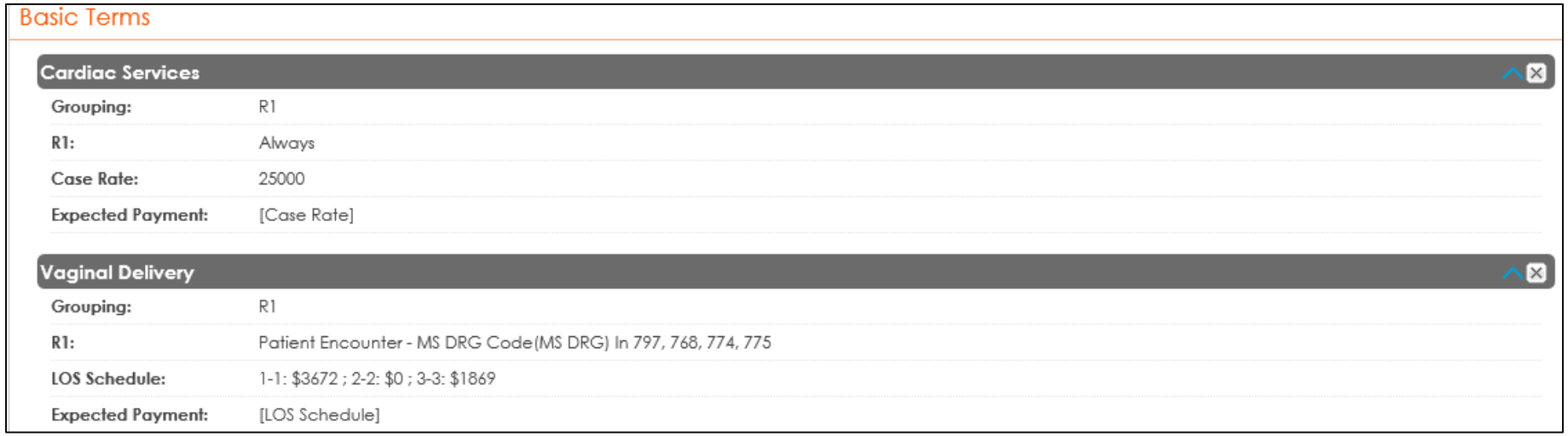


© Strata Decision Technology

3. What is the Issue?

Common Contract Issues

Strata Decision TECHNOLOGY



Basic Terms

Cardiac Services

Grouping:	R1
R1:	Always
Case Rate:	25000
Expected Payment:	[Case Rate]

Vaginal Delivery

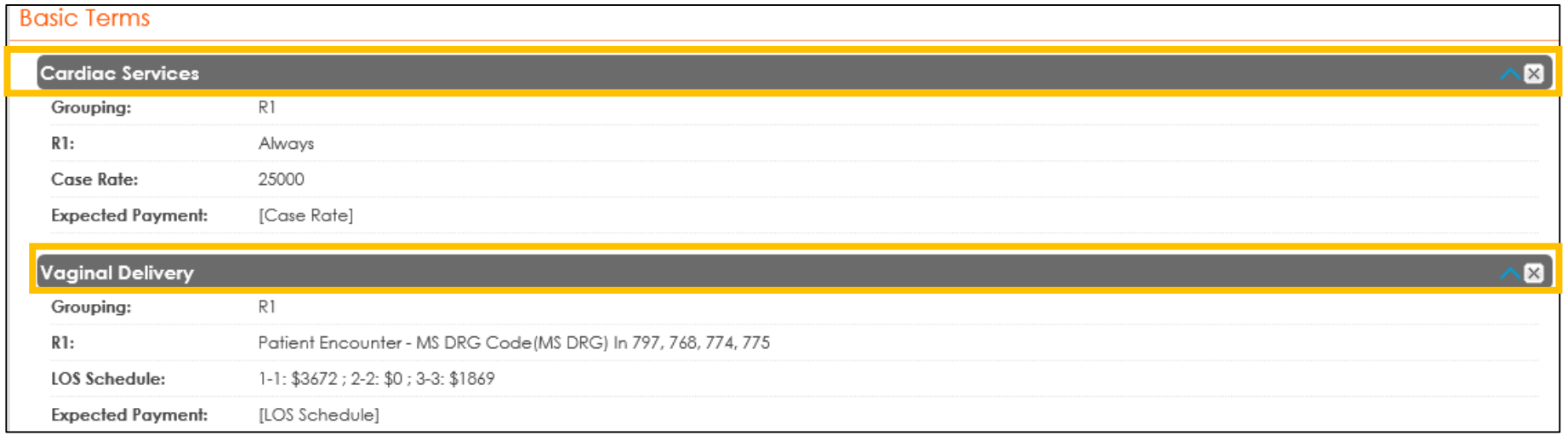
Grouping:	R1
R1:	Patient Encounter - MS DRG Code(MS DRG) In 797, 768, 774, 775
LOS Schedule:	1-1: $3672 ; 2-2: $0 ; 3-3: $1869
Expected Payment:	[LOS Schedule]

© Strata Decision Technology

3. Incorrect Hierarchy of Rules (Answer)

Common Contract Issues

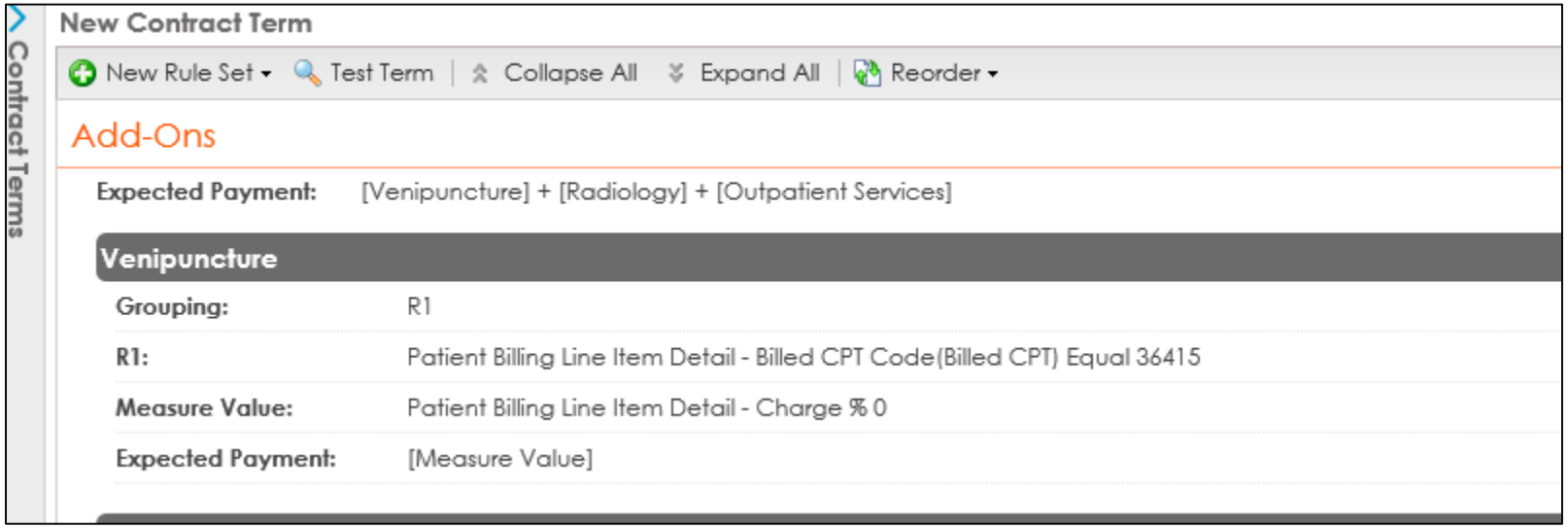
- Issue: Incorrect Hierarchy of Rules
- Next Step: The always rule is listed first. Change the order of the rule sets using the Reorder button in the contract.



© Strata Decision Technology

4. What is the Issue

Common Contract Issues

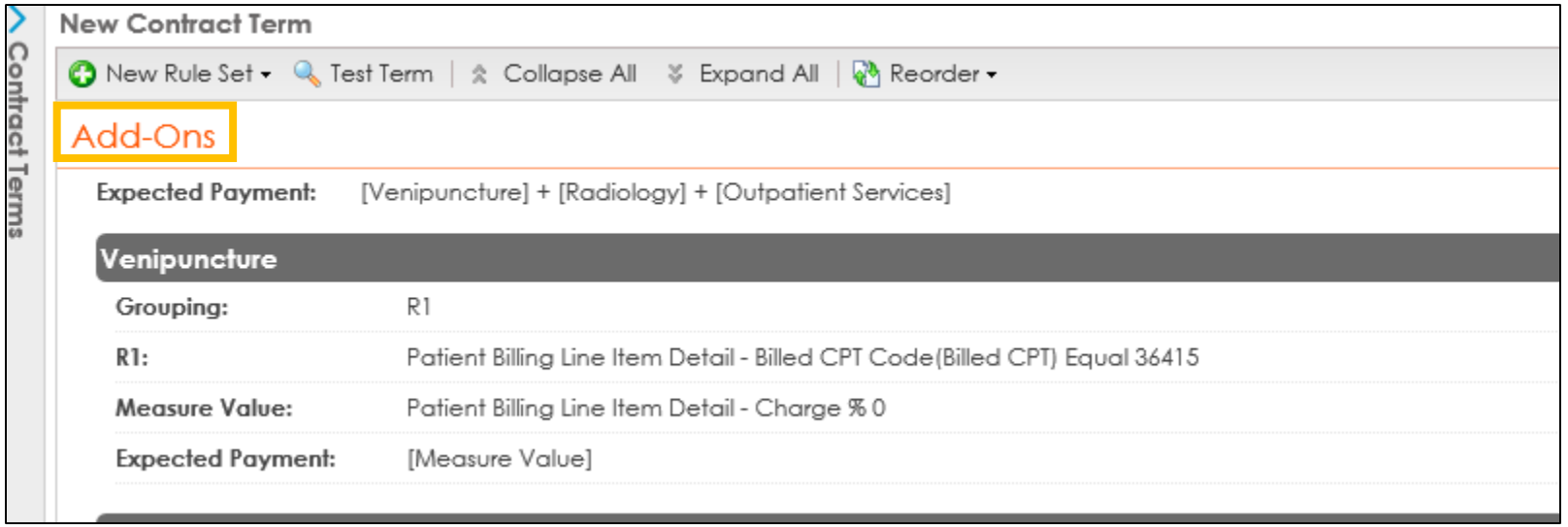


© Strata Decision Technology

4. No Basic Term

Common Contract Issues

- Issue: No Basic Terms listed for the Contract Term
- Next Step: Evaluate the contract terms and include the appropriate basic terms.



© Strata Decision Technology

Questions?

Training Evaluation

Please complete this five-minute survey prior to leaving training today. Your response will provide us valuable information so that we may constantly improve our delivery, content, and technology, and ultimately provide you with the best possible learning experience.

Access the **survey** through the following link:
https://stratadecision.getfeedback.com/trainingday

Training Session:
Contract Analytics Troubleshooting

© Strata Decision Technology