



Streamlining Verification of Benefits

A Case Study on Cloud Maven, INC.'s Eligibility Checker

CLIENT OVERVIEW

A leading senior healthcare provider offering personalized in-home care through primary physicians, nurse practitioners, and physician assistants faced challenges with their manual Verification of Benefits (VOB) process. This crucial step, required for all patients before visits, ensures coverage. The inefficient system required manual extraction and re-entry of patient and insurance details, involving 25 full-time employees (FTEs) to handle 9,000 VOBs monthly, each taking 25 minutes. These inefficiencies wasted resources and increased the risk of errors, leading to claim denials and billing issues.



CHALLENGES

The manual VOB process created bottlenecks, affecting the overall care experience. Incomplete VOBs led to rescheduling, uncovered services, and claim denials. The client faced the following challenges:

-  **High Labor Costs and Delayed Processing:** A team of 25 FTEs was needed to extract patient, insurance, and payer details, perform VOB, and re-enter eligibility and benefits into the patient account/billing system. This led to delays in scheduling visits, rescheduling issues, inefficient provider utilization, and cancellations of services.
-  **Tracking and Governance Issues:** Managing and tracking the completion of allocated verifications by team members before scheduled visits was a managerial and governance burden.
-  **Inaccuracies and Security Concerns:** Incorrect extraction of patient intake, data entry issues, and re-entry of coverage details led to verification failures and incorrect claims. There was a higher risk of data breaches and HIPAA violations due to multiple touchpoints and errors from 25 FTEs performing VOB checks and data entry.

SOLUTIONS

Cloud Maven, Inc. addressed the manual VOB challenges by implementing the automated Eligibility Checker tool within the client's patient CRM system (Salesforce Service Cloud). Additionally, CM deployed Secure File Transport (SFT) and OCR solutions (Document Insights - DI) to resolve data entry issues.

-  **New Patient Intake:** SFT and OCR (DI) accurately captured patient, insurance (member ID, group ID), and plan details, parsing information from state IDs and insurance cards into the CRM.
-  **Recurring Verifications:** Automated triggers based on schedules (3 days before visits) pulled data for patient, insurance, and plan details, returning coverage benefits directly within CRM eliminating data entry errors.
-  **Effective Work Management:** Accounts with parsing issues and VOB check failures were flagged and allocated to 5 FTEs for review. CM developed list views to identify accounts with OCR issues and failed VOBs.



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**Consulting &
Advisory**



**End-to-End
Workflow Automation**



**Seamless
Integration**





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BENEFITS

The client improved their revenue cycle management results, leading to a 40% reduction in "days of sales outstanding." They also achieved the following benefits:

- 1 **Annualized OPEX Reduction:** The automated VOB tool allowed the client to do same volumes of VOB with 5 FTEs (from initial 25), saving \$1.2 million annually.
- 2 **Timely Verifications:** Faster verifications before visits, minimized visit reschedules, and improved provider capacity utilization.
- 3 **Process Visibility and Governance:** Automated VOBs eliminated tracking issues. List views and auto-allocation of exceptions to 5 FTEs improved governance and visibility.
- 4 **Accurate Processing:** VOB verification failures and incorrect claims due to data entry errors were reduced by 90%. This also improved RCM results and days of sales outstanding (DSO) by 40 %.
- 5 **Security and HIPAA Compliance:** VOB within Salesforce and fewer manual touchpoints minimized data privacy risks and improved compliance.

CONCLUSION

Cloud Maven, INC.'s Eligibility Checker transformed the client's VOB process by automating a manual, error-prone task. This resulted in significant cost savings, improved operational efficiency, and enhanced homecare delivery for senior patients. The streamlined VOB process ensured accurate and timely verification of patient benefits, enabling optimized care.

-  **40%** Reduction in Days of Sales Outstanding
-  **\$1.2M** Annual OPEX Savings
-  **90%** Reduction in Verification Errors
-  **5X** Efficiency Improvement
-  **3 Days** VOB 3 days before visits eliminated reschedules

Eligibility checker



Accurate and timely verification of patient benefits, enabling uninterrupted and optimized care

- Secure access to 850+ health payers
- Real-time eligibility and benefits check
- Seamless Salesforce Health Cloud integration
- Obtain real-time authorizations instantly
- Customizable Reports and Analytics
- Secure, HIPAA-Compliant Cloud Environment



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