

Revenue Cycle

Managing Remote Staff

A Training Resource



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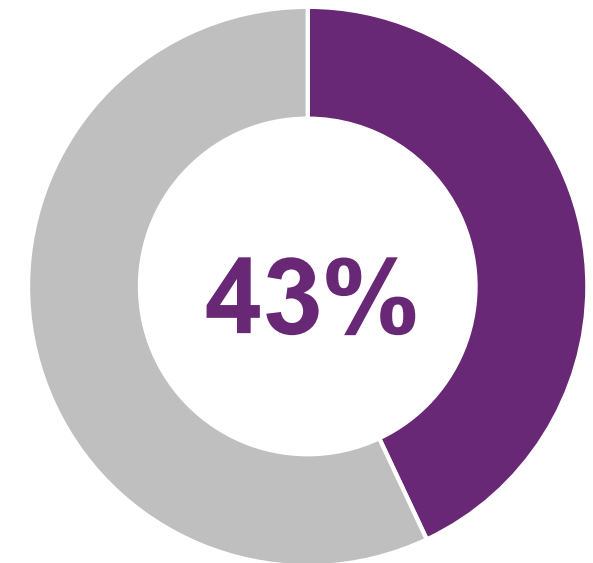


Overview

- Managing remote staff members requires additional skills and considerations beyond what is generally necessary in an office setting
- Most aspects of managing remote teammates can be easily translated to an in-office setting—for example, all staff should know what is expected of them
 - However, managers can struggle to apply those concepts while communicating effectively with remote staff, and small communication gaps can quickly escalate into serious issues
- Remote work is increasingly common in the revenue cycle (especially in the mid-cycle) and throughout other industries
- This training presentation provides considerations for managers overseeing remote staff on how to set expectations, oversee day-to-day activities, address performance issues, and recognize team members for their accomplishments

Percentage of Employees Who Work Remotely at Least Some of the Time

Source: Source: Gallup (2017)



HBI surveys conducted between 2016 and 2018 found that 21% of members allowed CDI specialists to work remotely at least half the time, 20% allowed utilization review specialists to work remotely at least some of the time, and 56% had at least half of their coders working remotely

SECTION ONE

Setting Expectations

- Clarifying Schedules
- Defining Roles
- Creating Workflows
- Formalizing Goals and Requirements
- Building Team Culture

Clarifying Schedules

- When staff work remotely, it creates the opportunity to provide flexible scheduling
 - Remote staff might not have to work traditional hours that their peers in an office setting are used to
- However, if you allow remote workers to have flexible schedules, it will be important to confirm their schedule will not interfere with responsibilities
 - For example, they should not miss meetings if attendance is required for on-site staff

Possible benefit of flexible scheduling

Remote staff members' schedules can allow for expanded department hours. For example, a remote call center staff member can have a later start time to be available for patient calls after onsite team members have gone home



Defining Roles

- Whether hiring a new staff member or sending a team member home, it is vital to clearly describe their responsibilities and address any questions as soon as possible
 - It can be harder for remote staff to get answers or clarification because they cannot catch a manager in person for a quick conversation
 - Questions and answers might be drawn out over multiple emails, or you might play phone tag before finally connecting
- If you are hiring, defining a new staff member's role for them is a crucial part of onboarding

When possible, use a mix of training resources, including interactive opportunities that enable conversation, rather than relying solely on manuals or how-to videos



Creating Workflows

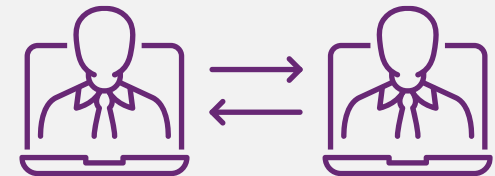
- A key part of setting expectations for any staff member, but especially one who is remote, is to explain the workflows they should follow
- When someone is remote, it can be harder to identify issues or know they are struggling
 - By giving them workflows to follow, their manager creates opportunities for red flags to be noticed
- Clearly defining workflows gives remote staff confidence to work efficiently and effectively
 - They will know when to ask for help and when they will be expected to problem-solve
 - They will know when an account is ready for hand-off and how to alert the next staff member in the process

Formalizing Goals and Requirements

- Staff should know how their performance will be evaluated
 - Provide written explanations of productivity and quality expectations and of how performance will be measured
- If you have both remote and on-site staff, will they be evaluated against the same goals?
 - Remote staff can be your “superstars,” so it might make sense to hold them to higher standards and treat remote work as a privilege they earn for achievement
 - If staff are remote for other reasons, such as if distant offices have been consolidated because of a merger or acquisition, it might make more sense to hold all team members to the same standards

Set expectations for communication

- How formal or informal should team members be with each other?
- What is considered a “timely” response?
- How can staff balance a need for uninterrupted focus against remaining available to their coworkers?
- Should messages flow through certain systems (e.g., should account hand-off occur within software rather than by email?)



Building Team Culture

- In an office setting, team culture is often built informally and gradually
 - Coworkers chat during lulls in the action or before meetings start, and they see each other in the lunch room
 - When you have remote workers, those little moments often are not an option, and they can feel excluded from the group
- As a remote manager, it can be necessary to create opportunities for remote workers to socialize with teammates
 - If an entire team is remote, building culture can be especially difficult

Team Building Strategies

- Hold video meetings
- Set aside time in meetings to play icebreaker games or talk about personal topics
- Bring remote staff onsite periodically
- Hold group chats
- Involve other team members in onboarding



SECTION TWO

Managing the Team

- Promoting Effective Communication
- Monitoring Productivity
- Ensuring Quality
- Meeting Staff Needs
- Adapting Your Approach

Promoting Effective Communication

Good communication is necessary for a team to be productive and efficient, but there are many possible complicating factors



Technology

- Ensure technology works as expected. Can remote staff hear during conference calls? Can they see a shared screen?



Time zones

- Be aware of time differences. Are you scheduling an early-morning or end-of-day meeting that would be outside a remote team member's normal hours?



Lack of visual clues

- Create space for remote staff to enter a conversation. Ask them for their thoughts to show they will not risk interrupting someone (or being interrupted) by contributing to discussion.



Information gaps

- Send meeting recaps and summaries of developments that occur outside group discussion. This provides a touchstone to prevent confusion and lost time when remote staff would have to play catch-up.

Promoting Effective Communication (cont.)

Effective managers consider how to adjust their communication style, when appropriate, to support remote staff members



Respond in a timely manner

- It is easy to be overwhelmed by email or chat notifications or to postpone answering a question because of other priorities, but it is important for morale and productivity to respond as promptly as possible.



Check for understanding

- Ask remote workers if they have questions rather than leaving the burden on them to reach out.



Select the appropriate channel

- Email offers a method for sending answers (and documenting them), but a phone call could be necessary to avoid confusion on a complex topic



Be spontaneous

- Include remote staff when possible in “watercooler” talk through group chats or emails

Monitoring Productivity

- When staff members are not in the office, it can be hard to determine how closely they should be monitored
 - For on-site staff, it is easier to know if someone is spending too much time on non-work activities or incorrectly prioritizing assignments
 - It is easy to veer into micromanagement with remote staff and equally easy to become too “hands off”
- Do not be afraid to have a conversation with your remote worker about their work
 - Talk about what they have accomplished and what still needs to be done

Making Monitoring Easy

- Use the systems in place whenever possible to monitor productivity
- Are there too many or too few accounts in their work queue?
- Are they making the same number of “touches” as on-site staff?
- If punctuality is important, such as with call center staff, track their login and log-out times



Ensuring Quality

- The systems staff use also can be of great help for monitoring quality
 - Do a remote biller's claims trigger more edits than your on-site staff?
 - Is coding accuracy the same for remote and on-site teammates?
- Conversations to review quality audit results can be held over the phone or by video chat
 - Try not to deliver this information by email
 - Create opportunities for your remote staff to discuss performance with you, whether good or poor
- Provide feedback frequently
 - Recognize good performance in real time to reinforce habits and behaviors
 - Similarly, call attention to poor performance or mistakes to prevent issues from worsening and to help staff learn how best to operate on your team



Meeting Staff Needs

- Remote staff rely heavily on technology, so it would be beneficial to have a written plan for handling IT issues
 - For example, are remote staff responsible for fixing computer problems? What should they do if their internet service is interrupted?
- Confirm that remote staff know how to access files and resources they need on internal servers and other systems
- Periodically ask whether staff need a tool they do not have

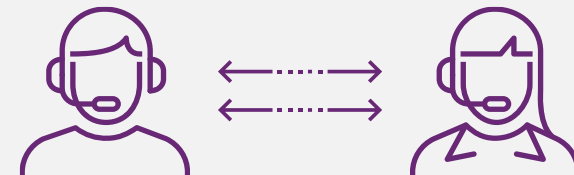
More Communication Tips

Be accessible

- Ensure all staff members know how to best approach you with questions or concerns and then be responsive when they do

Schedule regular one-on-ones

- Having a standing meeting to talk about workload, performance, and other topics gives remote staff an opportunity to have your undivided attention rather than interact with you mostly during conference calls or group meetings



Adapting Your Approach

- Understand local norms
 - If you are managing staff in another country, there could be differences in professional culture
- Prepare for multiple levels of management
 - If some of your staff works together in a remote office, they could also have an onsite manager
 - When this is the case, you will need to coordinate management tasks to ensure you and the local manager are not contradicting each other or creating confusion for staff members
 - It can be beneficial to include local managers on emails and other electronic messages to remote staff so communication is clear and time can be saved if issues arise that require collaboration with the local manager

Staff in another country might be more sensitive to criticism or feedback, meaning conversations that would normally be had in “public” (such as through a commonly accessible project management system) should be handled in a more private setting (such as email or by phone)



SECTION THREE

Having Tough Conversations

- Naming the Issue
- Addressing Poor Performance
- Following Through

Naming the Issue

- If you suspect a remote staff member is struggling or not following through on a responsibility, ask them about it
- By describing what you have seen and asking the staff member about it—rather than accusing them of making a mistake or failing to meet expectations—you create an opportunity to have a conversation without putting your team member on the defensive

Having a Tough Conversation



1. Identify the possible issue:

It appears a staff member is forgetting to send an important report to another department



2. Ask, don't accuse:

Try “The department manager says she has not received the report the past few months. Can you tell me what’s going on?” rather than “Why haven’t you sent the report?”



3. Listen:

You might reveal miscommunication about responsibility for the report, or you might learn the “problem” does not really exist or is not as severe as suspected, such as if the staff member is sending the report to end-users but forgetting to CC their manager



4. Act:

If you have identified a true issue, work with the staff member to correct it

Meeting Staff Needs

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When to Call

Have tough conversations by phone or on a video chat. These are not conversations that should be had by email or chat because there can be too much of a lag between responses and too much potential for miscommunication due to the lack of cues from tone, facial expression, body language, and more.



Monitoring Productivity

- Check in with staff periodically to discuss whether performance is improving or whether additional changes might be necessary
- If your staff member needs something from you to improve their performance, such as additional training or replaced equipment, ensure they receive it as soon as possible

Providing Constructive Feedback

Feedback helps staff see differences between current and previous performance and can reinforce positive changes

The Issue: A call center representative had low quality and productivity scores, but their performance has improved

Poor Feedback: “You’re getting better at taking patient calls.”

This feedback is poor because of the lack of detail. What is the staff member doing better? What new behaviors are causing the improvement?

Constructive Feedback: “Your average call time dropped by 30 seconds because you’re following our process for pulling up accounts. I think you are on track to meet the goal we set to reduce average call time by a full minute if you also begin reducing the amount of small talk on each call.”

This feedback is constructive because it describes the improvement, explains its cause, and sets the stage for what the staff member still must do.

SECTION FOUR

Recognizing Performance

- Praising in Public and Private
- Rewarding High Performers

Praising in Public and Private

- When a team member is remote, it can be hard for their coworkers to see their contributions to the team's goals and success
- When a remote staff member has achieved something worthy of praise, take the time to send a group email or to mention it during a meeting

Acknowledging success

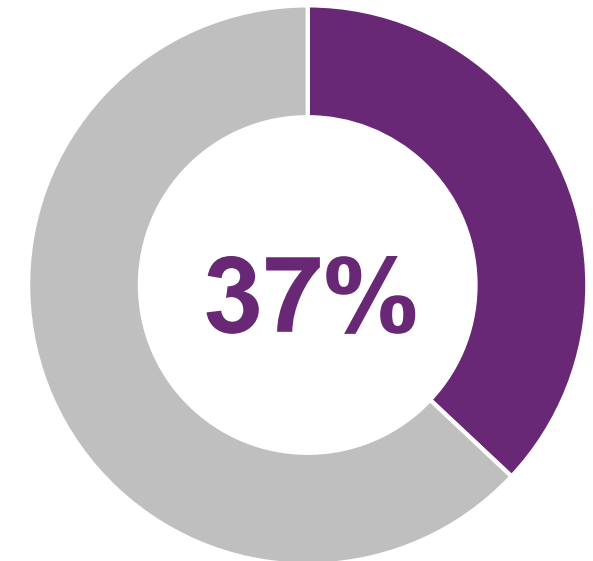
Do not forget to take the time to have one-on-one conversations with remote staff about their achievements to create the opportunity for a more personal conversation



Rewarding High Performers

- Like with any team member, ensure remote staff are rewarded for great performance
- Think about the rewards that might be most attractive to a remote staff member
 - For example, a flexible schedule might be a special perk for an on-site worker, but alternative hours are already common for many remote workers
 - Acknowledging a big achievement with a handwritten card can be a personal touch that builds loyalty

Organizations Providing Incentives for Back-End Staff Who Achieve or Exceed Productivity and/or Performance Goals
Source: HBI Revenue Cycle Academy (2017)



Conclusion

- Making a concerted effort to improve communication, build a team culture, and manage proactively can have huge benefits for remote staff members
- Remote work has significant potential to reduce costs and increase staff satisfaction
 - As the practice grows more prevalent and expands beyond the mid-cycle, managers should be prepared to meet the needs of remote team members

QUESTIONS?



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