

Case Study

RefundManager®

Willis Knighton Health System
Shreveport, LA
Mr. Greg Gavin
Physician Network Administrator



Finding the cure for a credit balance backup

A credit balance bottleneck

Like many practices, Willis Knighton's central business office is the hub of all refund processing. But even though NextGen® Practice Management is designed to work across multiple practices, it doesn't offer an enterprise-wide view of patient credit balances.

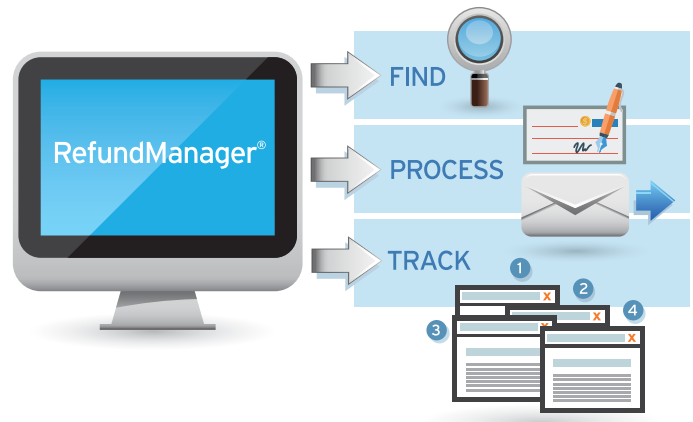
As a result, Willis Knighton's 125 independent offices developed their own way of managing, tracking and disbursing credits – apart from NextGen. Office managers would do their own credit balance investigation and tracking. If a refund was required, they would print refund forms out and then fax them to the finance department. Once received, reviewed and validated by finance, refunds were then posted back into NextGen. Finally, the refund information was forwarded to a third party accountant who would manually log and cut checks. That's a lot of steps, and it took a lot of time... as much as four to six weeks.

Continued on next page



RefundManager® to the rescue

Itentive knows that managing credit balances and processing refunds can be costly and inefficient. That's why we created RefundManager, a productivity add-on for NextGen® Practice Management which significantly reduces time and cost. RefundManager integrates with your existing database and accounting system and launches from a menu within NextGen Practice Management so you can find, process, and track credits and refunds easily.



"We went from generating three or four pieces of paper per patient to a simple check-box."

GREG GAVIN
PHYSICIAN NETWORK ADMINISTRATOR



Research, refund, redistribute...and relax

The idea of creating a whole new way to work for different offices might seem daunting. But with RefundManager, there was no need to change Willis Knighton's basic controls and workflow. That's because RefundManager is similar in operation – and also look and feel – to the NextGen application. So it's easy to learn and train.

It's powerful, intuitive, and also customizable. After gaining an understanding of Willis Knighton's challenges, we went to work on how to uniquely solve for them. We ended up creating customized roles, one for the practice as a requester of a refund; and another for the central business office as processor of the refund. And while requesters purposefully cannot process refunds, they are able to take credits for patient balances and apply toward a patient-owed amount. A simple dashboard keeps track of outstanding requests, and all refund processing and oversight is kept in NextGen for ease of use and efficiency.

And with more than 70 different bank accounts throughout Willis Knighton's network of offices, Itentive created an integration with QuickBooks, allowing RefundManager to map refunds through the appropriate bank account automatically.

Happier patients and a healthier bottom line

By eliminating bottlenecks and streamlining approvals, RefundManager helped bring refund processing down from four weeks to just one – resulting in much happier patients. Staff hours required to process refunds were slashed in half, which helped eliminate the cost of one full-time employee.

RefundManager's simple functionality also reduced the need for Willis Knighton's third party accountants, which has further helped improve their bottom line. In fact, full return on their investment in RefundManager is beating their initial expectations, and is projected to be fewer than six months.

For more information on RefundManager, visit Itentive.com



Itentive.com, info@itentive.com, 224.220.5500