

Indiana Business Acumen Course Syllabus for Home and Community-Based Services (HCBS) Providers

Spring/Summer 2022 Training Track

Below are descriptions for each ADvancing States business acumen course offered for Indiana's HCBS providers and Community Based Organizations (CBOs). Sessions are voluntary and aim to assist providers with education, preparation, and transition from a fee-for-service system delivery model to a managed care system delivery model. There is some overlap of material for the sessions below, however, this is by design, with the aim of helping CBOs to fully consume and comprehend the information presented. The homework after each session includes what we believe to be helpful tasks and activities for CBOs as they prepare for this change. CBOs should feel free to pick and choose which assignments feel most meaningful to them.

(Course descriptions will remain the same for the Fall/Winter Training Track, unless needed changes are identified throughout the course of the Spring/Summer sessions.)

FSSA Transition to MLTSS

Course description: While FSSA has offered many opportunities for providers and others to learn about the managed care long-term services and supports (MLTSS) change, this session will be about the provision of specific information related to the change and reasons why business acumen training is a valued and important endeavor. This will allow for questions to be asked and addressed in advance so that the following training sessions can focus on the topics at hand. This session will be the State of Indiana's opportunity to set the stage with providers and share overall information about why the change is occurring, timeframes, the need for and value of the upcoming training, and any other detail the state deems helpful.

MLTSS Training

1. Managed Care 101

Course description: The Managed Care 101 session is a repeat of an earlier presentation from ADvancing States that reviews the basics of MLTSS, key elements and characteristics of MLTSS programs, and federal requirements such as network adequacy standards and person-centered processes.

2. Managed Care Contracts

Course description: When the time comes to negotiate a contract with a managed care entity, it is important to know that every CBO and MCE partnership is different. These differences may result in usage of various types of contracts or agreements, which also come with their own alphabet soup, such as a NDA, BAA, or MOU. This session will focus on contracts, where you will have the opportunity to learn about the lifecycle and time-frames of the contracting process within the world of managed care. The session will walk-through key areas of a typical contract, such as effective and termination dates, data-sharing requirements, and when, how, and under which conditions payments occur. At the end of the day it is critical that CBOs fully understand all parts of the agreement and what happens when the contract is not fulfilled. Knowing these details will help to set the stage for success.

3. Managed Care Claims Payment

Course Description: After a hard day's work, getting paid is critical. The managed care claims payment process will be different with a Managed Care Entity (MCE) versus the Fee-For-Service experience. In the session, we will talk through multiple pieces of the payment process such as education and training of staff, billing timelines, claims submissions, and encounter data. In addition, we will discuss the role of the service plan, which drives MCE generated authorizations and the following steps. As part of this process, participants have the opportunity to learn even more new terminology and its relevance. Examples include understanding what a clean claim is, why it is important, and state requirements for health plans surrounding payments. Last, as we all know, sometimes payments don't happen as planned. In these situations, it will be important to know your rights and understand the appeal process.

4. Managed Care Value Based Payment (VBP)

Course Description: Value-Based-Payment (VBP) models pay for value instead of volume, or quality over quantity. There are various model types or value-based arrangements but all are focused on performance and quality versus numbers. Come learn about the purpose of VBP, different model types, and associated risks and rewards for your organization. We will talk through multiple VBP scenarios and discuss some of the challenges. For organizations attending that have participated in a value-based arrangement, we welcome you to share your experiences as well.

Business Acumen Courses

1. Process Improvement

Course description: This session will cover foundational strategies for continual process improvement for CBOs. The session will start with an overview of typical strengths, weaknesses, opportunities, and threats (SWOT) analysis and how the results of that analysis can be used to develop strategies and goals that will help CBOs achieve their vision for the organization. This session will also help CBOs understand the importance of process improvement practices such as reviewing workflow processes, mapping current business processes, completing time studies, and creating job aides. The group will review specific areas and measures important to the state and how CBOs can improve tracking and monitoring those areas with the tools mentioned above.

Documents/homework associated:

- If not already done, complete a SWOT analysis of your CBO.
- Complete the "Realizing Your Vision" table using what you know about what is important to the state (and MCEs) to measure

Blank templates of all the above assignments are found in the appendix. In addition, the Aging and Disability Business Institute houses a variety of helpful tools at the [link here](#).

2. Measures

Course description: There is a business adage that states "what gets measured, gets done." Measurement is central to monitoring ongoing compliance, tracking progress toward goal achievement, and assessing performance and quality improvement results. FSSA will join this

session to review what they consider as the most important measures and outcomes for which they will hold the MCEs accountable. CBOs will then be able to structure their measurement processes accordingly, including tracking and monitoring for those outcomes. In addition, this session will define and help clarify terms and themes used in data measurement, including leading measures, lagging measures, outputs, and outcomes. This session will also introduce the scorecard concept, and why and how scorecards are used along with their strengths and challenges.

Documents/homework associated:

- The state shared their most important measures and outcomes, for which the MCEs will be accountable. Using this information, review your organization's ability to speak to those measures.
- What business case will your CBO make to meet MCE needs? What is the value proposition to be made?

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***Office Hour Opportunity:** Office hour opportunities will be used to discuss whatever the CBO would like and could include reviewing any of the homework or associated documents from the above two sessions. Office hours are also an opportunity for CBOs to engage in peer-to-peer learning. Discussions during office hours may be used to inform upcoming sessions.

3. Data Collection

Course description: This session will be all about data, a key factor that has a direct impact to many, if not all, of the topics covered in the business acumen courses. Without good quality, verifiable data, many of the other business acumen processes won't be as helpful or successful for CBOs. This course will review what types of data MCEs will most likely be looking for and which data monitoring tools CBOs might find most helpful. Examples of software that can be helpful for data collection will be included. CBOs will be able to review their data collection system through a critical thought lens after attending this session.

Documents/homework associated:

- Fill out the "Use Data to Demonstrate Outcomes" table. Examine the accuracy and location of the data used for the "Where is the data?" column.

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4. Analytical Data-Driven Decision-Making

Course description: Reliable, valid data plays a huge role in the everyday processes of your CBO and there is evidence that sharing data can even improve outcomes. With the right data, CBOs can better assess for risk, track what is going well and what needs improvement, and identify where business processes could benefit from another review. This session will act as a continuation of the previous session and will review how to interpret CBO data in a way that will help organizations use it for effective decision making according to CBO needs.

Documents/homework associated:

- When you completed the SWOT analysis in session 1, what areas were identified as weaknesses or opportunities? How can your data tracking and decisions play a role in improving those areas?
- Complete a data inventory. How can the data collected help your CBO with decision making? What data does your CBO currently collect and what data does your CBO still need based on what the MCEs are looking for?
- Data awareness within the CBO can help staff understand the mission and goals of the organization. Do your staff know which data is being collected, the purpose of the data collection, and how it is used?

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5. Managing Risk in a Managed Care Environment

Course description: It is imperative for CBOs to think about ways managed care environments may have an impact on their bottom line. Managing risk in a managed care environment includes planning for potential delays in claims payments and taking steps to ensure your CBO is not overly dependent on any one payer. CBOs should determine which services could possibly be attractive to other payers (diversifying opportunities for income) and assess the return on investment for each service. Creating service portfolios can help organizations obtain a better understanding of how each service the organization provides contributes to the sustainability of the organization.

Documents/homework associated:

- What are the greatest areas of risk for your organization?
- How can your CBO mitigate that risk? What steps, timeline, resources need to be included in your risk mitigation strategy?
- Which stakeholders, if any, should be made aware of the risk?
- If a claims payment from any MCE is delayed, how will you ensure your CBO can stay afloat financially until payment is received?

6. Cost Savings

Course description: CBOs have an opportunity to put their business ahead of the curve if they know how to position their organization as a solution to payers' cost savings needs. This session will discuss ways to meet payers halfway by offering CBO services as cost savings according to the payer's needs and values. This session helps CBOs identify and learn ways to promote cost-savings, helping to make the CBOs more attractive to payers. It is also important for CBOs to know how to track efficiencies and costs of providing services so that when it comes time to contract with MCEs, CBOs know their true costs before negotiations occur. This session will

identify ways to best position and clearly articulate CBO services that will speak to the cost savings needs of managed care entities.

Documents/homework associated:

- Fill out the “Connect Services to Outcomes” table with a focus on how your CBO’s services help with payer cost savings

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7. Pricing and Rate Determination

Course description: Providers and CBOs should know their worth. This session will discuss values, margins, and variable/fixed costs that factor into pricing and rate setting. Presenters will also discuss the importance of documenting terms of agreements and monitoring revenue flow since many CBOs in managed care environments receive revenue from many different payers and negotiate different rates and payment terms. Other strategies to help ensure CBOs are meeting their bottom line, such as hiring new staff, implementing new technology, or shifting focus to volume of services or diversification will also be discussed.

Documents/homework associated:

- Pretend your organization is offered an opportunity to negotiate pricing with a managed care entity. Write down how you will present the business case for your ask.
 - What are going rates for similar services in the market?
 - What are the values and cost savings your service brings to the potential payer?
 - If you’d like, bring your information to office hours for an opportunity to practice with peers.
 - See the ROI Calculator for Social-Service Partnerships at [this link](#). This is a free tool that assesses financial risks and rewards in payment arrangements.

8. Developing and Implementing Quality Improvement Processes and Systems

Course description: Continuous quality improvement is a management philosophy that organizations use to reduce waste, increase efficiency, and increase internal and external satisfaction. It is an ongoing process that evaluates how an organization works and implements ways to improve its processes. This session will discuss different methods of addressing quality improvement, such as logic models, the Plan-Do-Study-Act cycle and fostering a culture of high performance.

Documents/homework associated:

- Using what you know about what is important to FSSA in terms of measures,
 - Create an outcomes-focused logic model.
 - Write out a Plan-Do-Study-Act cycle (or hypothetical cycle).

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“Extra Credit” (Further reading, resources, and exercises for CBOs to consider after the initial managed care rollout)

- Draft or create a balanced scorecard that can be used continuously to monitor the quality of CBO services and programs. The scorecard should attempt to answer the following:
 - a. Customer/Stakeholder perspective: “How do customers and/or stakeholders see us?”
 - b. Internal business (processes) perspective: “What must we excel at?”
 - c. Innovation and learning (capacity) perspective: “Can we continue to improve and create value?”
 - d. Financial perspective: “How does the organization look to its shareholders?”
- Choose at least three characteristics of high performing organizations and describe why striving for those characteristics are a good fit for your CBO’s culture.
- Practice your pitch with other CBOs or in front of others at your organization. Complete the “Elements of an Elevator Pitch” table.
- Evaluate new opportunities. How can your CBO expand your book of business to new areas? How can your board play a role in advising, planning, and helping growth of new business lines? Consider including these topics in your board meeting agendas.