10 STEPS

Find the Financial and Operational Solution That's Right for You

A simple guide to discover a flexible and integrated platform for addiction treatment organizations

nextgen® healthcare

TABLE OF CONTENTS

Step 1: Prioritize your needs 3

Step 2: Research your options 4

Step 3: Establish a budget 5

Step 4: Draft a request for proposal (RFP) 6

Step 5: Short-list your top contenders 8

Step 6: See the solutions in action 9

Step 7: Building a partnership 10

Step 8: Request best and final offers 11

Step 9: Choose a partner 12

Step 10: Contracting 13

Explore a solution built for the future 14

Your addiction treatment organization needs innovative, sophisticated technology solutions to engage your patients more effectively and capture the full revenue potential of the services you provide.

This simple 10-step guide can help you find a flexible, integrated solution that will support your organization through changes in market trends, technology, regulatory and reporting requirements, consumer expectations, and more.

STEP 1

PRIORITIZE YOUR NEEDS

Before you can select technology that will support your future, it's essential to have a clear view of what you want your future to look like. A great place to start is your strategic plan.

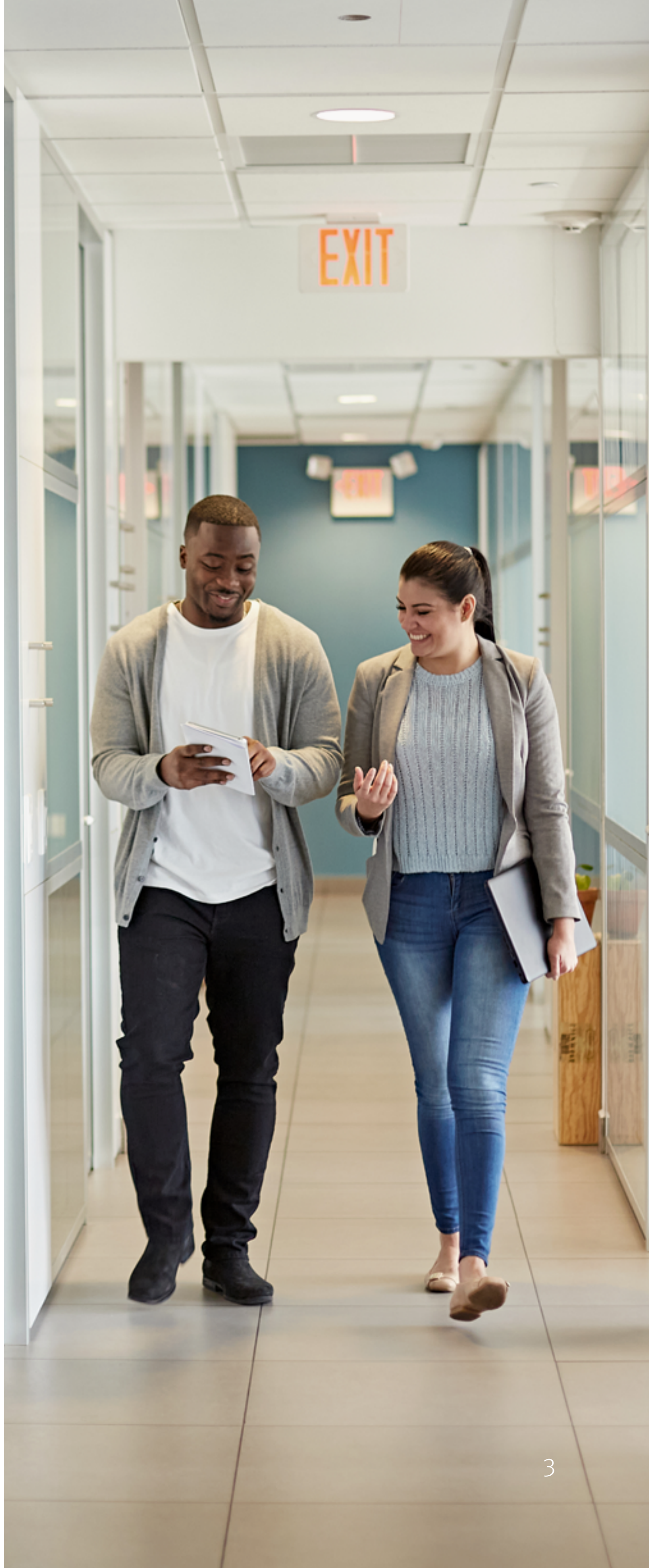
For example, does your plan include:

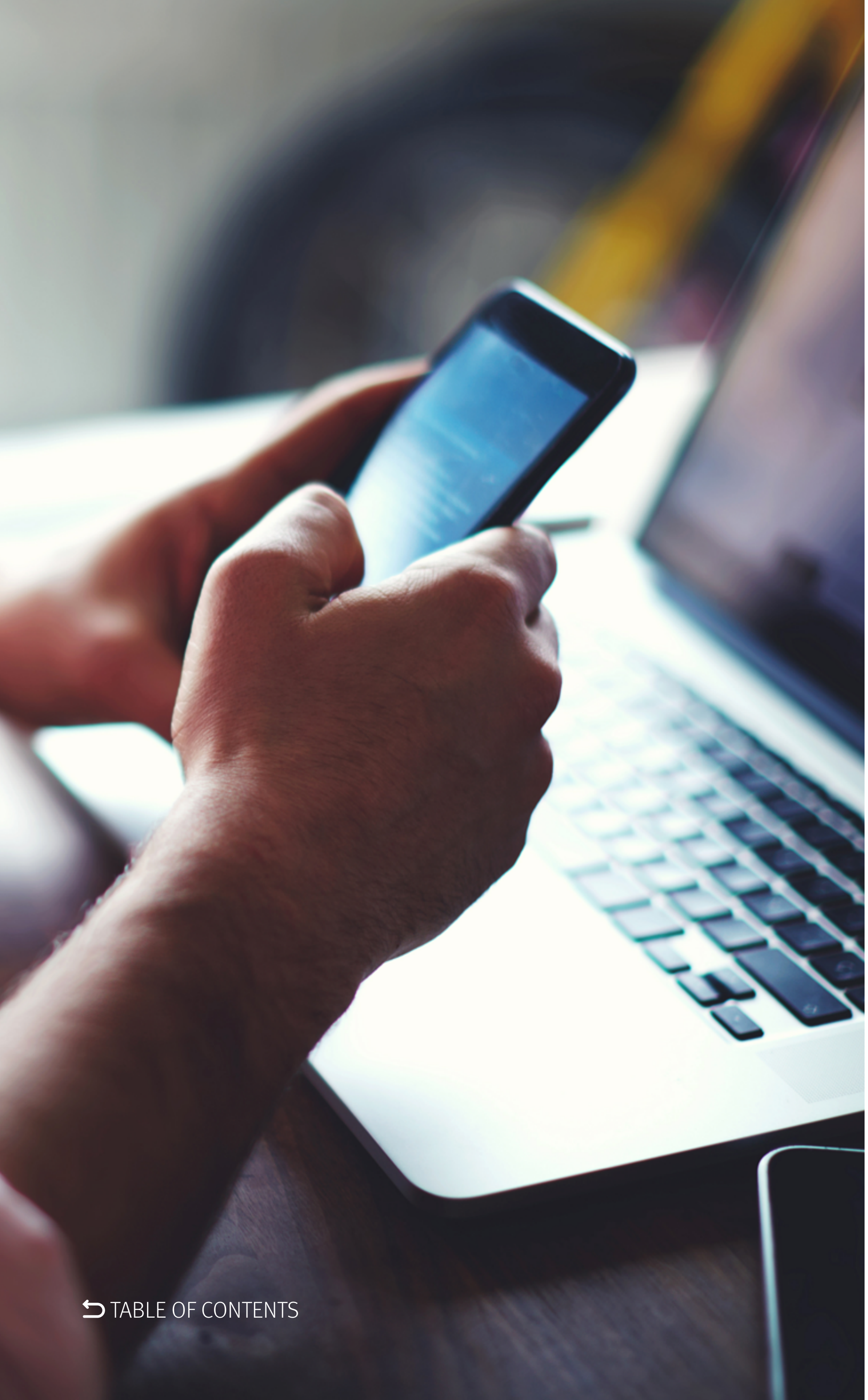
- Growing into new communities?
- Adding new programs and/or services?
- Substantially increasing the size of your team?

These are all important considerations for selecting the right solutions to support your growth.

Common challenges for addiction treatment organzations that are important when considering new IT solutions include:

- Supporting multi-state organizations
- Integration with other software systems, including automated medication dispensing software
- Functionality and ability to configure systems to meet specific needs of your organization
- Scalability to expand or adjust in line with business strategy
- Navigating complex regulatory and reporting requirements
- Streamlining workflows and automating routine tasks (including with American Society of Addiction Medicine [ASAM] and Medication-assisted treatment [MAT] workflows)
- Maximizing reimbursement by effectively managing the complete revenue cycle for all payer types
- Leveraging your data for day-to-day financial, clinical, and operational decision-making as well as easily consolidating data to see trends and make more strategic business decisions





STEP 2

RESEARCH YOUR OPTIONS

1. **Choose your evaluation team**
   Assemble a team to guide the selection process with representation across key areas of your organization. Limit the team to no more than seven members to make decision-making easier.

2. **Build consensus and select potential vendors**
   The selection team must build consensus on which capabilities are most important to the organization. Next, the team should choose four or more vendors that likely meet the needs identified by the team.

3. **See solutions for yourself**
   Watch demos online to preview each of the identified products. During the demos, each team member should note the features they like and rank them based on how they'd help your organization.

4. **Finalize your prioritization of capabilities**
   Based on the team's initial research, finalize your list of required capabilities. The list will help produce a more useful request for proposal (RFP).

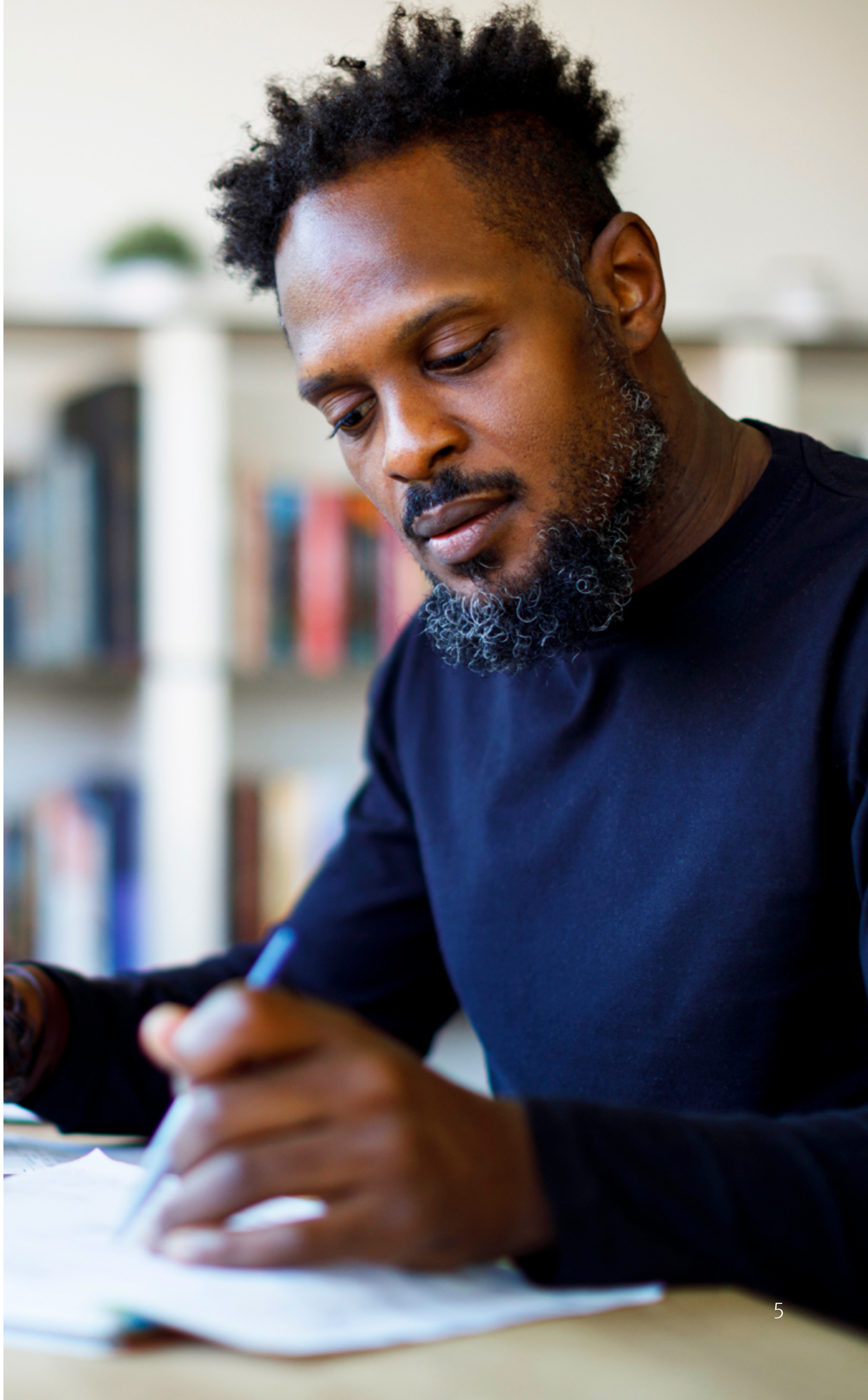
STEP 3

ESTABLISH A BUDGET

To develop a budget for your new solution, it's important to understand the cost of your current system annually, and the total cost of ownership over its expected useful life. Be sure to consider the cost of depreciation on hardware—servers, computers, and peripheral devices—where applicable. Remember to factor in recurring costs of licensing software, as well as what you pay for IT support and system maintenance.

Balance cost against potential ROI

When budgeting for a new technology solution, in addition to the costs for software and hardware or cloud-based subscription, factor in expenses for implementation services, training, and any data integration required for the new solution. These costs will be balanced against the potential for return on investment (ROI). If the new solution allows for greater integration and configuration, for example, you will likely save on labor costs.



STEP 4

DRAFT A REQUEST FOR PROPOSAL (RFP)

Be specific with your requirements for vendor proposals. The more clearly you outline your requirements, the better your responses will be. Typically, your RFP will be presented in short-answer format with an accompanying checklist.

Components of your RFP

Introduction – Provide information to the vendors about your organization and business processes and goals for the new system (i.e., what challenges are you trying to overcome and/or opportunities you want to take advantage of).

Vendor profile – Ask each vendor to share basic information about their company and their solution.

Requirements – Specify all the requirements you are looking for in your new solution. You may allow short-answer format responses, as well as a spreadsheet or table that lists each requirement allowing the vendor to indicate whether their solution provides this capability and whether it's included in the base cost or if there is an additional fee. You will use these answers to compare the offerings of competing vendors.

Sample requirements might include:

- Practice Management Capabilities
  - Patient Record
  - Workflow Automation
  - Productivity Tools
  - Scheduling
  - Configurability
  - Scalability
  - Integrated View of Patient Care
- Medication Management
- Patient Engagement
- Interoperability
  - Integration with Automated Medication Dispensing
- Mobile Access
- Revenue Cycle Management (RCM)
  - Billing
  - Claim Management
  - Prior Authorization
  - Error Processing
  - RCM Services (including the option of outsourcing)
- Bed Management (for residential facilities)
- Reporting
- Regulatory Compliance

Timelines – Provide timelines for submission, review, and decision-making.

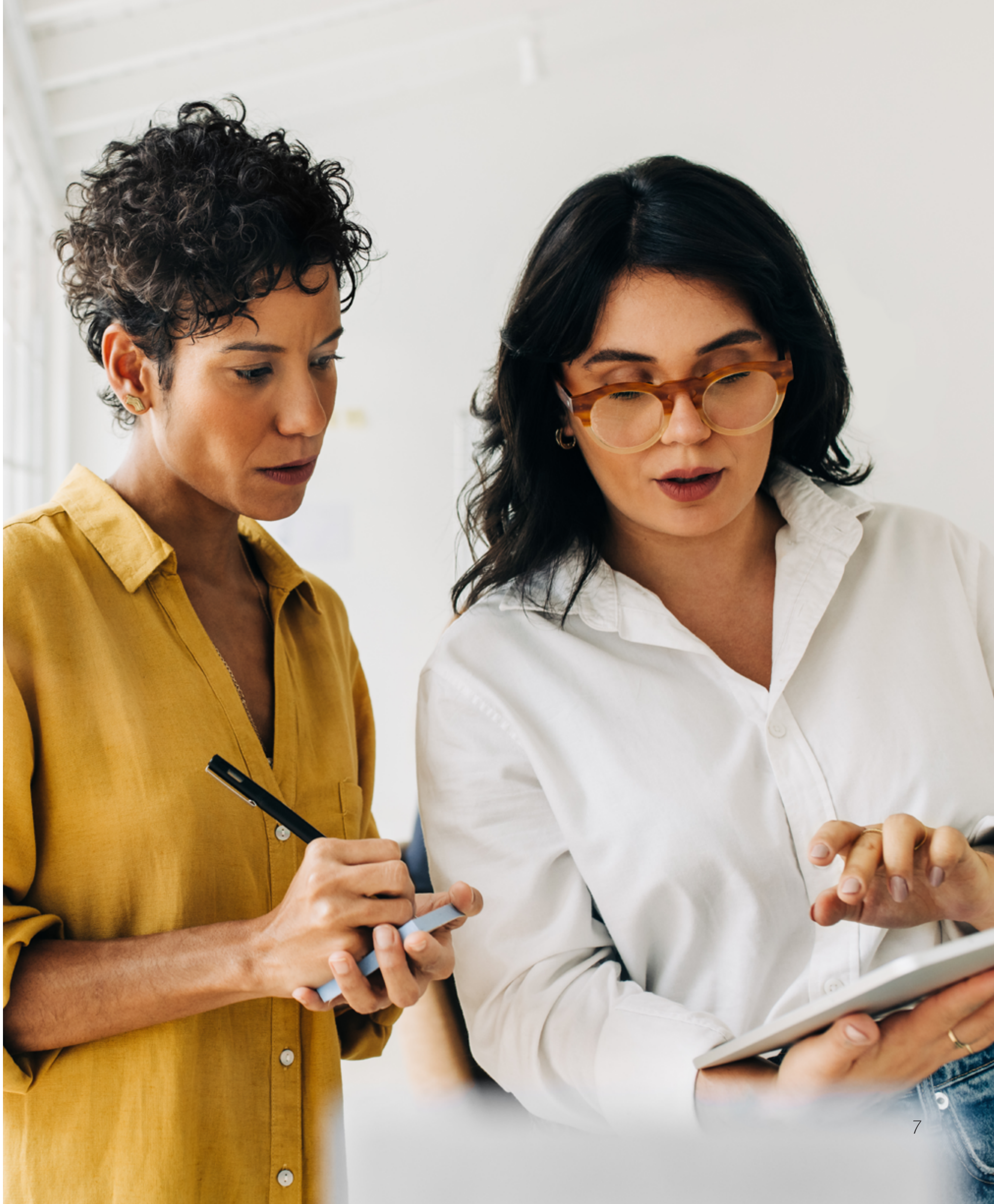
Cost – In addition to asking for cost data, ask vendors to provide explanations for these costs. Also, ask about licensing options and the costs for additional services, such as implementation, configuration/customization, data integrations, training, maintenance (if applicable), and technical support.

Regarding licensing options, see if they offer hosted, cloud-based solutions. In-house servers and maintenance will drain your IT budget. Find a partner who will host your software to free up your team's valuable time to focus on patient care.

Selection process – Include a brief summary of how you intend to make a final decision.

Additional RFP Tips

- The first page of your RFP should identify a single point of contact with an email address. Note that vendors will be disqualified if they communicate with anyone other than that point of contact or by any means other than the provided email.
- Ask vendors to provide 3–5 client references with a description of the products and services the vendor provided them.
- Do not share your budget information.



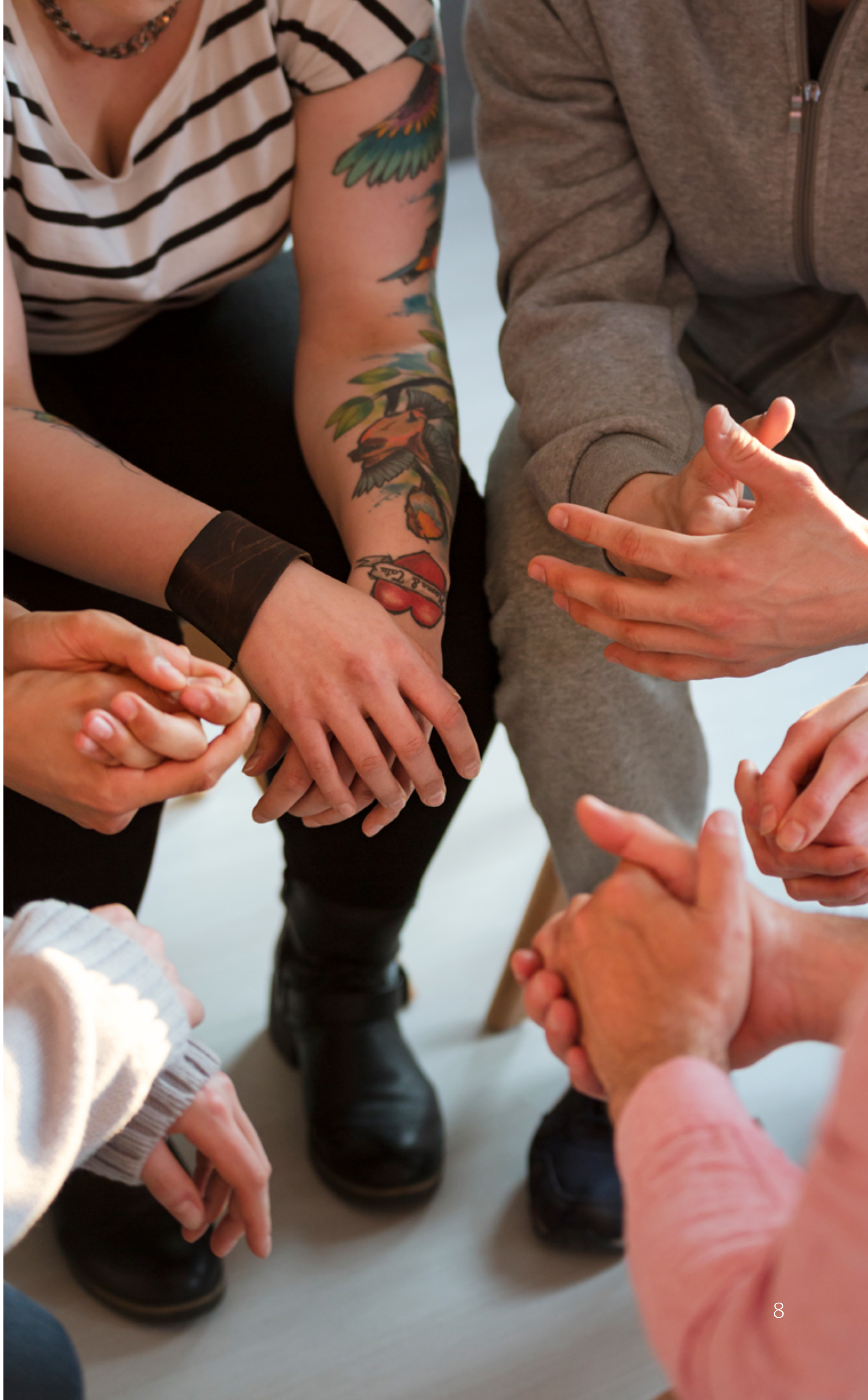
STEP 5

SHORT-LIST YOUR TOP CONTENDERS

Evaluate each proposal using a weighted scale methodology (i.e., putting more value on your highest priority requirements). There are many ways to score vendors and the level of granularity you apply is up to you. The important thing is that you employ some method to rank all RFP responses, so you feel comfortable that the top vendors based on your evaluation do in fact offer solutions that meet your needs and are within your budget.

Once all team members have scored each vendor, use the average scores to select the vendors who will move forward. Three is optimal, as the next step requires significant resource commitments. Be sure to notify the vendors who will not be moving forward.

Tip — It's not uncommon to find that vendors who meet your needs are outside your budget, and vendors who are within your budget do not meet your needs. If you find yourself in this position, stop and do some additional analysis. Carefully consider your needs and decide whether they can be scaled back or if your budget can be increased to get the capabilities you need most.



STEP 6

SEE THE SOLUTIONS IN ACTION

Schedule your top two vendors to conduct in-depth presentations (on-site at your location, if possible). Give them plenty of time (four-hour minimum) and prepare your team to rank every vendor's demo using the same scale. Tell vendors that they must deliver live demonstrations of their products (i.e., no pre-recorded demos).

Some organizations ask vendors to follow specific scripts, however, this limits vendors who may have creative ways of meeting your needs and tends to introduce limitations by carrying forward your current methodologies (which may not be in line with current best practices). Remember, this is your chance to rid your organization of workarounds created by your current technology solutions and take a fresh look at all of your processes and operations. Implementing a new system offers an ideal time to optimize your workflows. Be sure to take advantage of it.

Be prepared to ask tough questions. For example, dig in and see if each vendor's solutions can:

- Cost-effectively scale with your organization as you grow. For example, will the system allow your team to edit your own content and templates to keep your ongoing costs low?
- Be tailored to meet the specific needs of your clinicians and staff both today and as you grow.
- Fully interoperate with other systems and data sources. For example, does the solution allow you to seamlessly and securely share protected patient information with other providers and practices, when warranted, for more collaborative care?

Tip — During the live demo, require each vendor to add a new data element to an existing screen and create a new report using data from that screen. This will allow you to judge flexibility and whether your organization will be able to make changes on your own (not being reliant on the vendor for changes, which incurs delays and additional costs).

STEP 7

BUILDING A PARTNERSHIP

How you work with a vendor is as important as their product. During the on-site meeting, ask vendors to discuss the following:

Partnership Checklist

Implementation approach and methodology
Ask the vendor to show you a sample project plan. How many hours do they expect the project to take? How is the work divided between the vendor and your group? How quickly does the project begin once a contract is executed?

Data migration
Do they migrate data from your system into theirs? How exactly do they accomplish this? How do they price that work? What data elements are included? What data do they recommend, if any, that you pay to migrate?

Training
Do they provide professional training staff? What are their credentials? Will they come on-site to train, do you go to them, or is all training done virtually? What materials do they provide? What system do they use for training? Ask them to show you a training plan.

Proposal review
Ask the vendor to walk you through their proposal line by line and ensure you understand each charge. Confirm any additional costs not listed in the proposal. Have them describe and justify any costs that may change. Require they follow up by providing all of this information in writing within a week of the on-site meeting.

Get to know the vendor
The on-site demo is your team's chance to learn about the vendor and its people face to face. It is your best opportunity to evaluate the vendor before you make a decision and your first opportunity to build a relationship. You are seeking a partnership as much as a solution. Assess the vendor's willingness to engage in a long-term business partnership, as opposed to just making a one-time sale.

Considerations:

- What avenues of communication are in place if you need to seek support after the deal is signed?
- Ask the vendor what resources they offer to help ensure successful onboarding and ongoing use of their solution.
- As your organization's needs evolve, what resources do they have in place to help you meet future challenges and growth opportunities?

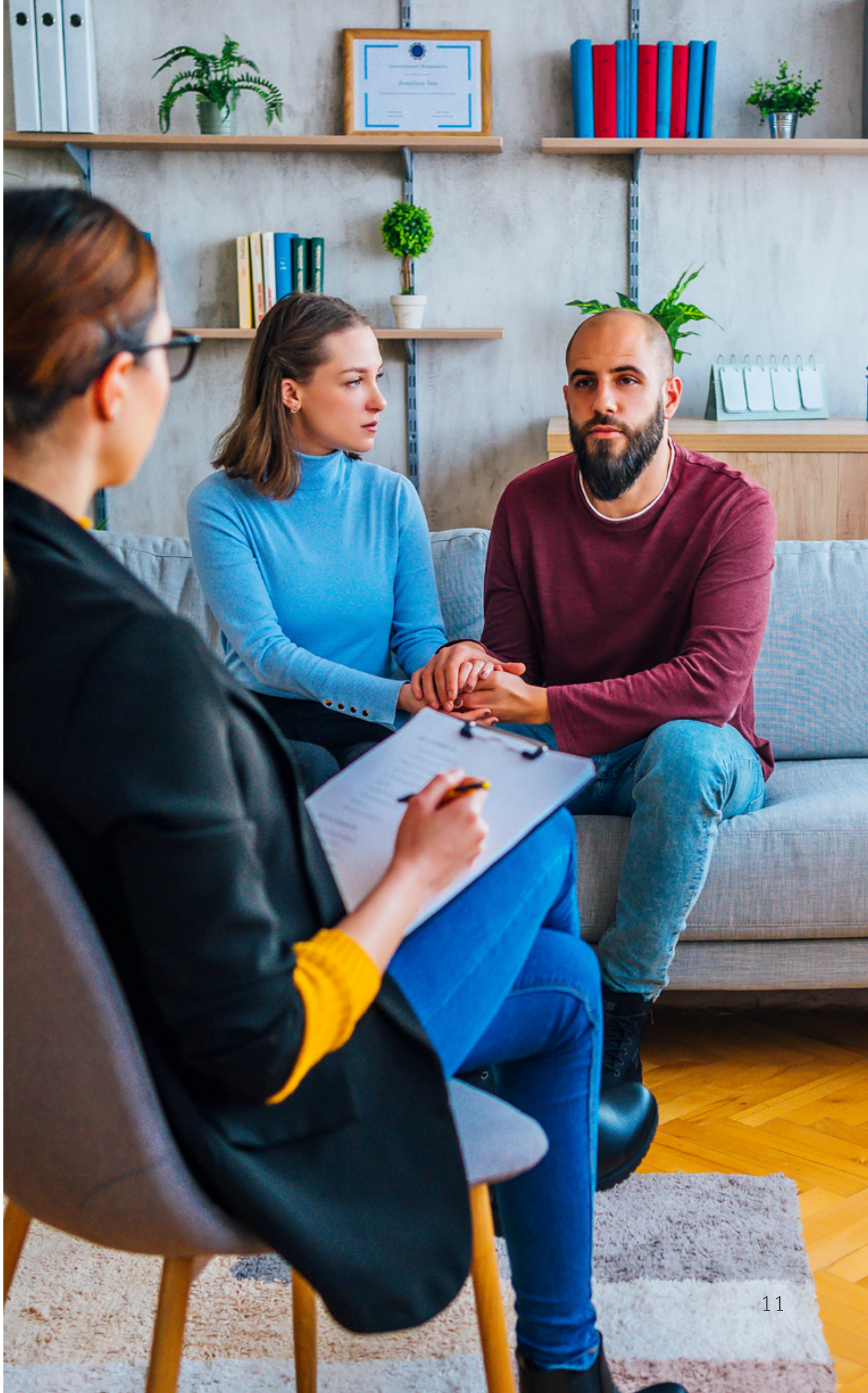
STEP 8

REQUEST BEST AND FINAL OFFERS

After reviewing 2–3 prospective vendors in-depth, your team may have identified a clear winner. If so, move to the contracting step.

If you have two vendors tightly matched in terms of ability to meet your requirements and your budget, communicate any additional requests for product or service features or changes to your expectations to the two prospective vendors. Consider providing additional information that would help them refine their offer. Ask both prospective vendors to submit a best and final offer. This gives them the opportunity to adjust their pricing and you a chance to get a better price.

Tip — Make sure both vendors are aware that there are only two finalists, and they are competing for your business with this best and final offer.



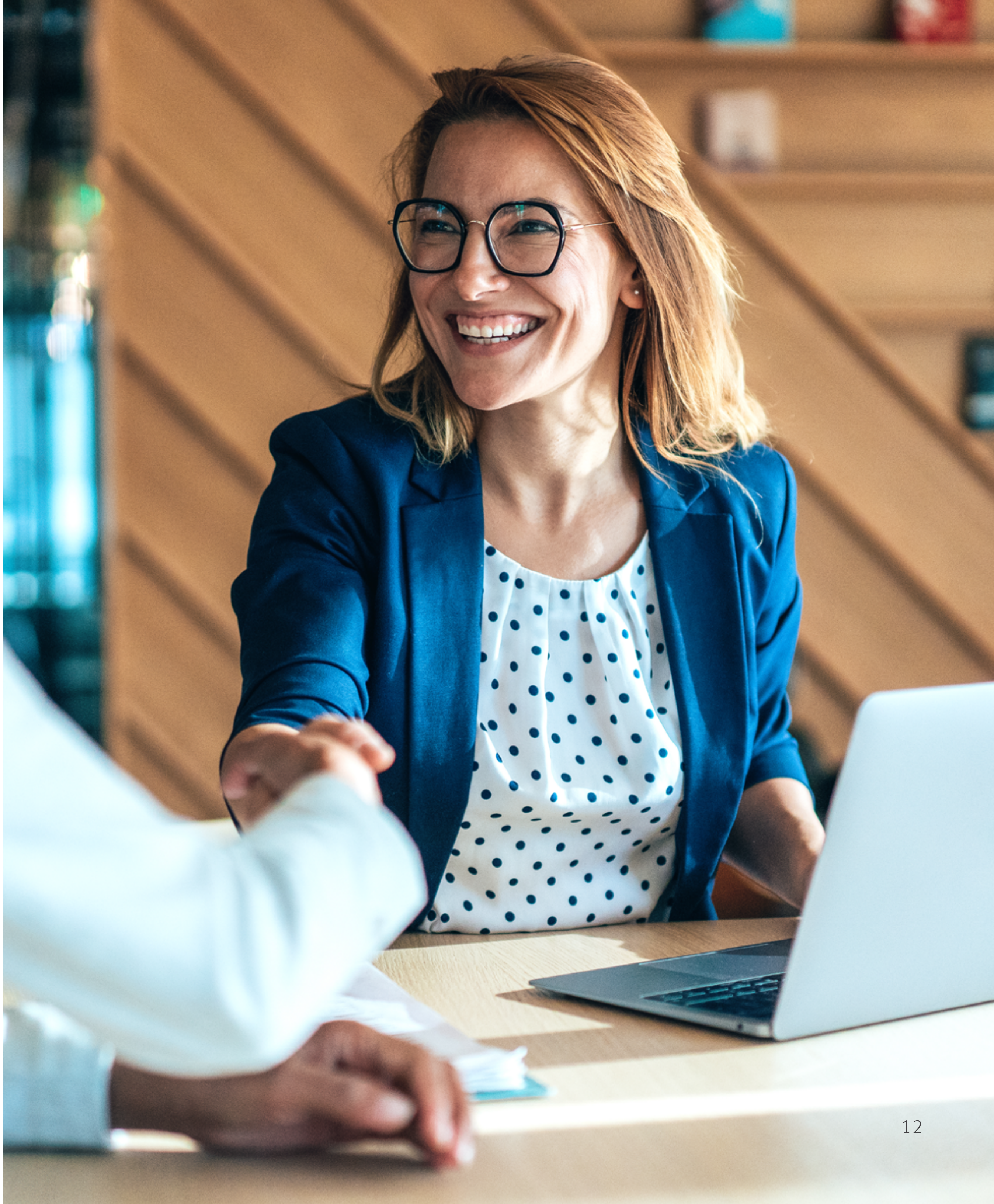
STEP 9

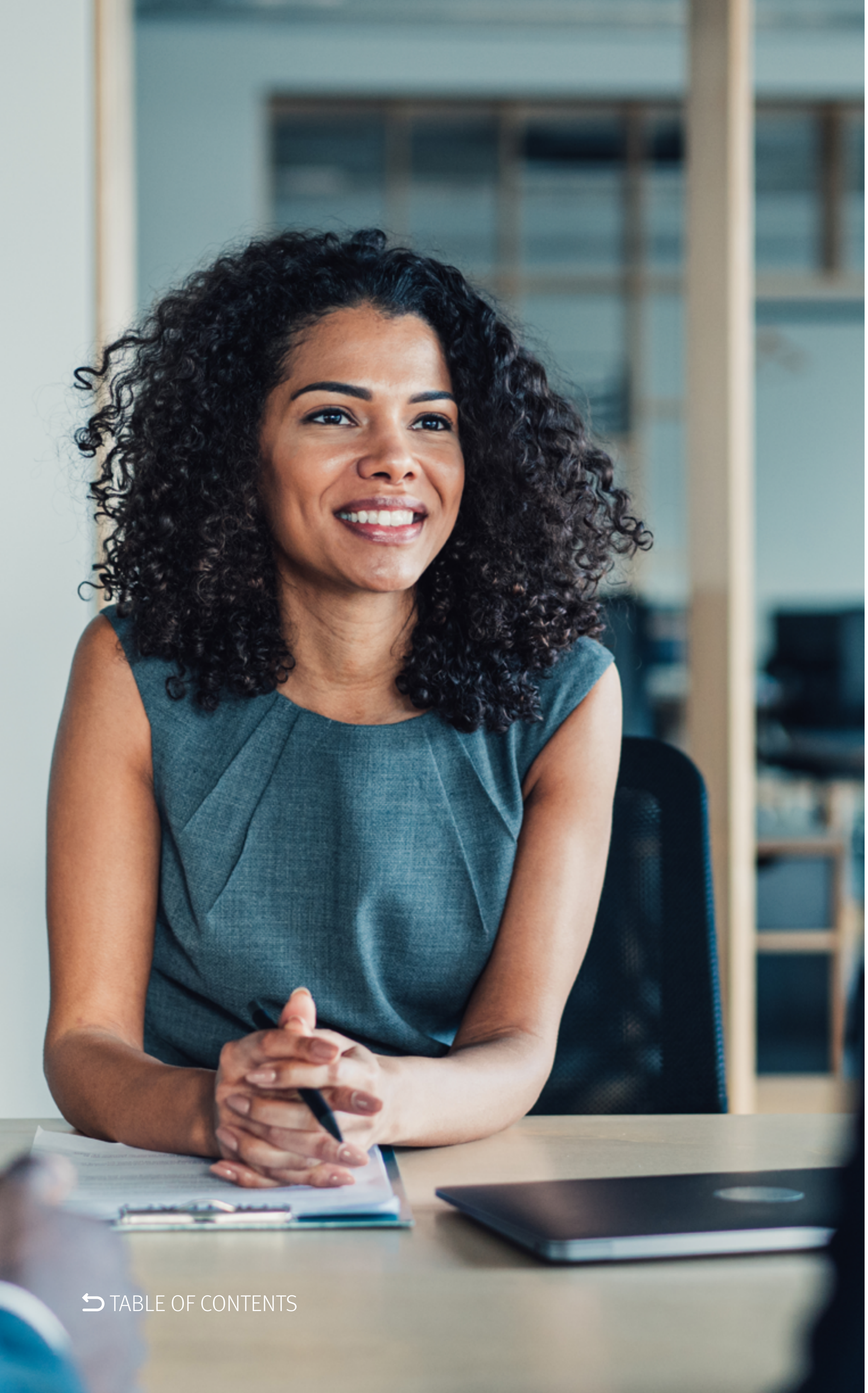
CHOOSE A PARTNER

By now, you may have one vendor who has earned the most votes from your selection team.

Negotiate terms with this vendor until you either sign a contract or reach an impasse. Do not notify your second-place vendor of your decision until you execute a contract with your vendor of choice. Notifying a vendor of second-place status can cause difficulties should you later decide to work with them.

Tip — Be sure to check the client references provided by the vendor. Insights from the vendor's clients add real-world value to what you learned during your research and evaluation phases. When you speak to these reference clients, be ready to ask specific, targeted questions. This will help you better understand how they are using the vendor's solution(s).





STEP 10

CONTRACTING

Ask your chosen vendor to submit their final contract and software licensing and services agreement, as well as any other paperwork needed to finalize the purchase agreement. Ask if there are any contracts and agreements for third-party software necessary for the system to operate. You may need to review these agreements as well.

Get legal advice

Send the paperwork to your legal team or outside counsel for a careful review. Make any necessary changes recommended by your legal advisors and make sure they are acceptable to the vendor. You are entering into a long-term partnership, so you should understand everything in the contract and be comfortable with all of the conditions.

If you hit a critical impasse in your negotiation, let the vendor know that if you can't come to terms, you intend to move on to another solution provider. Give them time to respond. If the impasse persists, you may need to switch vendors. If you are satisfied with the terms to which the vendor has agreed, execute the contract.

EXPLORE A SOLUTION BUILT FOR THE FUTURE OF ADDICTION TREATMENT ORGANIZATIONS

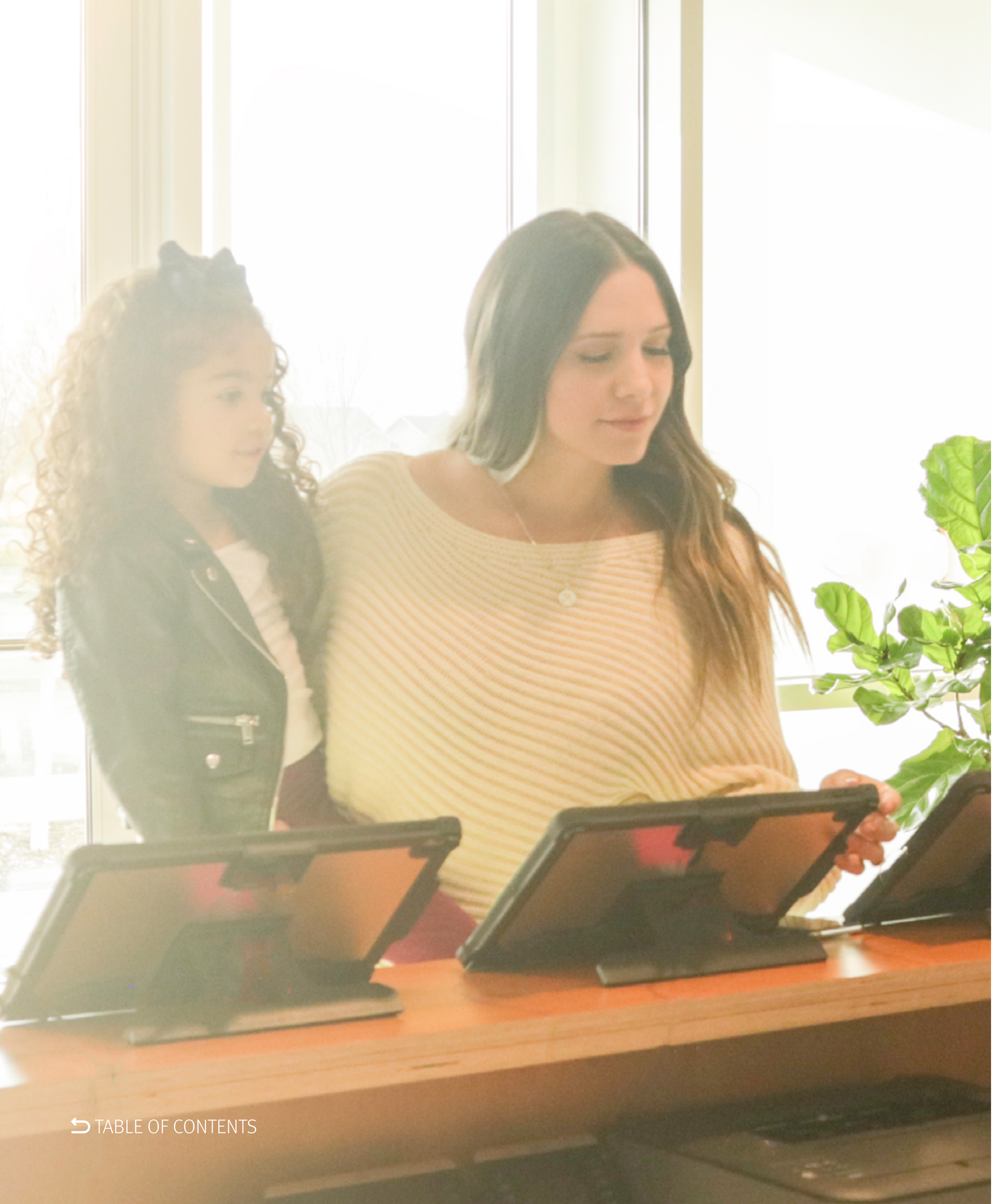
More than 400 behavioral health, integrated care, and addiction treatment organizations choose NextGen Healthcare technology solutions to improve care coordination and clinical outcomes, reduce administrative burden and errors, improve financial health, and expand patient access and engagement.

Practice Management

A practice management solution is fundamental for managing addiction treatment organizations. It reduces time-consuming tasks and helps users catch claim errors and denials early, and fix them quickly—while supporting the unique billing requirements of complex commercial payers.

Underpayments occur when the cost of providing care does not equate to the reimbursement received for delivering that care. They are often the result of miscommunication between insurance payers and clinics as well as contractual, billing, and coding errors. Underpayments are a reoccurring financial management challenge addiction treatment centers face and can be a source of significant revenue loss. Payment variance reports executed by one's electronic health record system can be an efficient way to reveal discrepancies between estimated payments and those received. Automating processes across the revenue cycle is another way to better manage those discrepancies. Automation of the revenue cycle can ensure claims are billed at the actual contracted amount, coded accurately, and processed as quickly as possible. Consider the following solutions for overcoming payment challenges:

- **Cost estimation tool**—know how much a patient will be responsible to pay as early as them walking in the door to get reimbursed in a timely manner
- **Claims intelligence engine**—scrubs each claim, formatting it per payer specifications, double-checking for any issues, and getting it ready to go to the clearinghouse
- **Clearinghouse software**—includes built-in intelligence for editing claims and automates claim statuses with predictive remit data
- **Financial analytics**—helps businesses understand A/R trends and uncovers underlying reasons why there are in increases in A/R days



NextGen® Enterprise PM is an award-winning practice management platform that unifies your workflow across the revenue cycle so your organization can run more efficiently, while providing the real-time data and key performance indicators you need to make intelligent business decisions. Assess your A/R, manage your month-end closing, analyze your payer mix, and ensure a healthier cash flow using customized financial reports.

Patient Engagement

Online access is reshaping care delivery. Your organization needs a 'digital front door' that makes it easy for patients to engage with you and take charge of their own treatment. Solutions that reinforce health and safety, meet consumer demand, and advance efficiency can attract new patients and help you stay competitive.

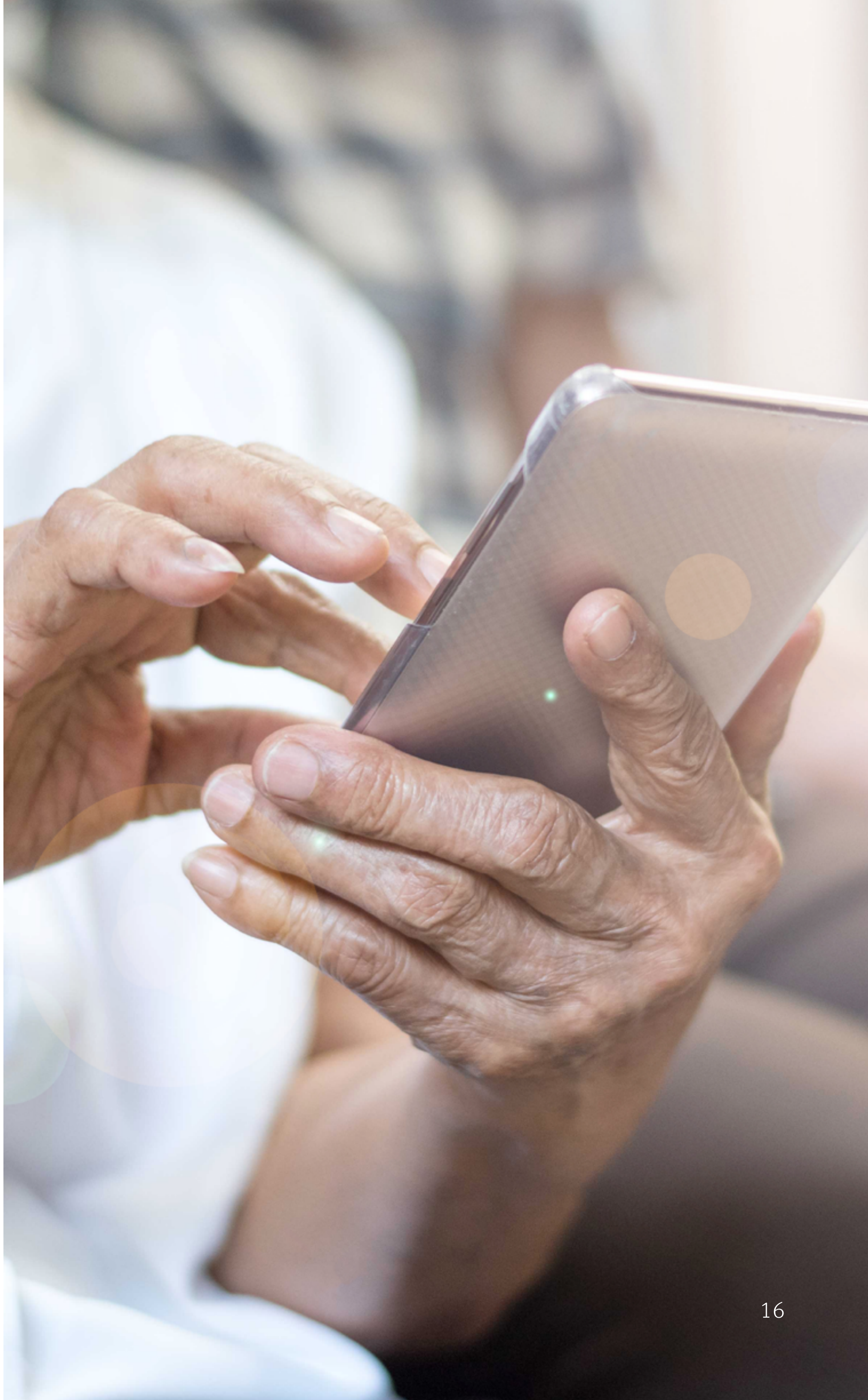
One way to meet rising expectations—open up better avenues of communication between your patients and the services you provide. Tools are available to help you communicate more effectively. The **NextGen® Patient Experience Platform** can keep your clinicians and staff on the same page throughout the patient's journey.

Patient-Reported Outcomes (PROs)

As addiction treatment centers continue toward patient-centric care models, providers will need robust tools to measure elements of care that are most important to patients and providers. Patient-reported outcome measures seek to comprehensively capture these important outcomes in an effort to support sustainable recovery.

Clinect PROs—a Clinect Healthcare solution in partnership with NextGen Healthcare— makes it easier for your organization to collect PROs. Allow patients to respond to PRO requests through text, email, in-office tablets, or on their mobile device—anytime, anywhere. With Clinect PROs, your organization can:

- Achieve a more detailed understanding of a patient's symptoms and emotional state to determine a personalized care plan
- Ensure patient touchpoints throughout the patient's treatment
- Enable patients to provide their view of outcomes from either your clinic or at home
- Provide critical clinical data to providers before discussions with patients
- Alert providers to response thresholds in real time
- Automatically capture patient condition data to facilitate insurance pre-authorization
- Save valuable personnel time and focus more on patient care
- Standardize assessment processes
- Improve clinical outcomes

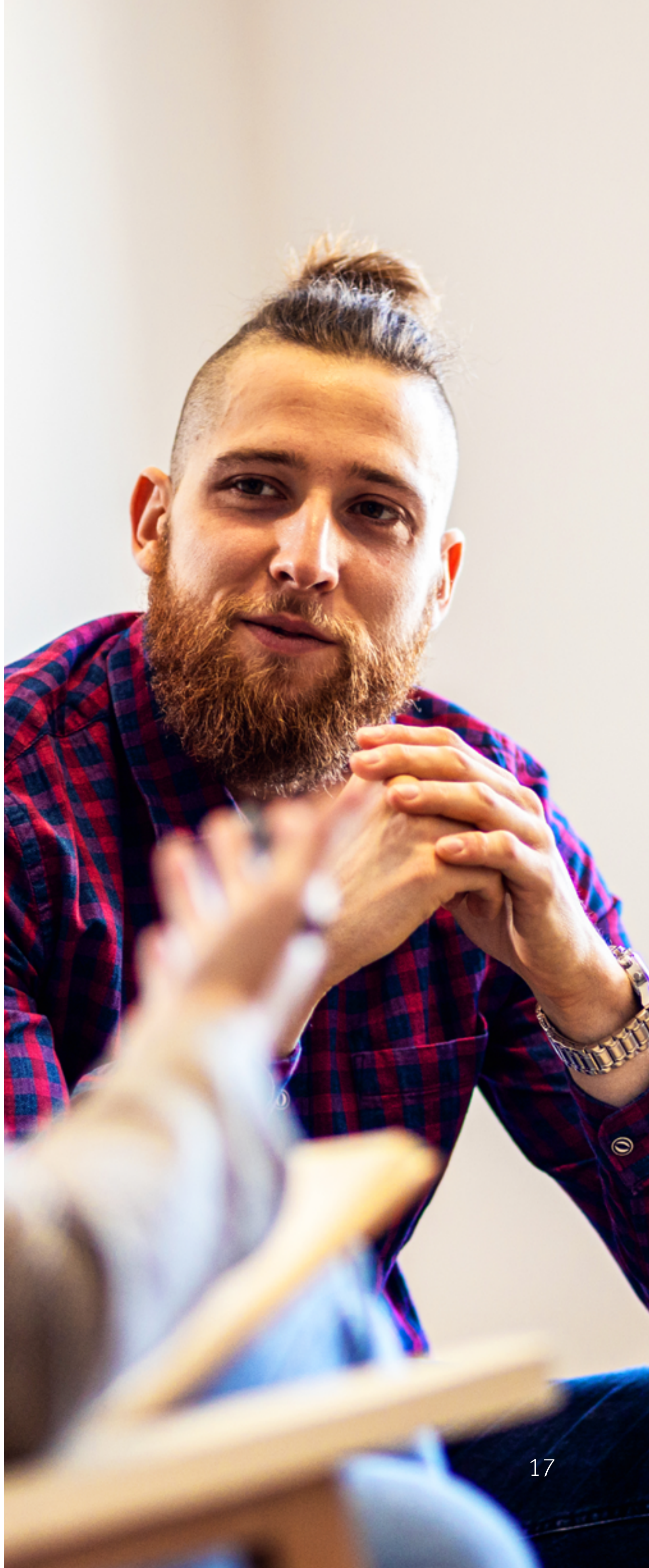


Revenue Cycle Management

Addiction treatment organizations need to achieve faster, more effective revenue cycle management to maximize financial results. **NextGen® RCM Services** create efficiencies and ensure tight financial control using our proven checks and balances. Your organization can reduce the time and cost to resolve claims, denials, and accounts receivable (A/R) challenges. We can also help your organization dedicate fewer resources to managing your operations, while simultaneously increasing collections.

Choose NextGen Healthcare

NextGen Healthcare is the trusted partner for substance use disorder and addiction management programs for alcohol, drugs, and opioids in residential treatment, detox, intensive outpatient services, partial hospitalization, and medically managed residential services. Our solutions provide SUD-specific clinical content so that you can meet client needs with ease and maximize financial performance by capturing revenue at the lowest cost.



TAKE THE NEXT STEP.

Contact us at 855-510-6398 or results@nextgen.com

With integration, interoperability, and meaningful insights, NextGen Healthcare helps organizations make a more meaningful impact on individuals, clinicians, and your community.

The aim—to make health and care better, for everyone.

BELIEVE IN BETTER.®

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