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Medical Records Audit, Advisory and Training Firm for Large Healthcare Payer Organizations, Group Practices, Hospitals and Clinics Enabling Greater Compliance and Operational Efficiencies while Lowering Risk



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“We are a smaller firm, but what we bring to the table is quality. We bring tools, methodology and delivery which is the core of what we were built on” - JeanmarieLoria

Interview conducted by:
Lynn Fosse, Senior Editor
CEOCFO Magazine

CEOCFO: Ms. Loria, would you tell us about Advize Health?

Ms. Loria: We are an audit and advisory firm specializing in healthcare. We service multiple markets to help make healthcare better in terms of operational efficiencies and to help mitigate overall risk. We serve several markets from the government space, the federal space, all the way to the private space, where we help both payers and providers. People often ask us who we are actually trying to help, and at the end of the day, it always comes back down to the patient. We are trying to make healthcare better for the patient. The biggest question and challenge we face as an industry is how to do that on the business side.

CEOCFO: Would you give us an example of the services that you provide?

Ms. Loria: One example would be where a payer would hire us to look at potentially fraudulent doctors. They will send us claims data, which we will review and then select which claims to audit. We then send the provider/doctor a letter stating that they will be audited and that their plan has hired us to perform a third-party audit. We look at the medical records provided and compare them to the billed codes to see if there was any fraud, waste, or abuse. After the review, we will send the results and help to educate the providers on how to avoid future missteps. That is what we do for the payers. On the other hand, providers hire us to help them with proactive education. Before they send in the bills to the insurance companies, we will review them for compliance. In our thirteen years of experience, we have seen that when we look at plans we want to make sure that you are as compliant as possible and that everything is on the up and up.

CEOCFO: Do you do this with technology, with human review or a combination of both?

Ms. Loria: It is a combination of both. We have proprietary software that we use to audit claims and that helps to make the audit results more robust. We have fewer errors and are able to get through the claims faster, but nothing is entirely automated; we still have the subject matter experts or clinical people who are Certified Professional Coders (CPCs), who take a look at the charts. What they are typically looking for is two different things; one is documentation review where we will look at a chart and say the doctor billed this one code, and that they do everything to meet that code within the documentation. Auditors often feel that if it is not documented, the provider did not do it. That is one type of audit. Another type of audit is medical necessity. We have nurse auditors who will provide the same kind of review - only they will challenge what was behind what was performed to ensure it was medically necessary.

CEOCFO: How do you work with the government?

Ms. Loria: Some states will perform audits on the providers. You see this often in fraud heavy states and they will hire us as a woman owned small business to go in and perform these same types of audits. We will perform desk reviews where

we go onsite and do the audits there, or we will perform an offsite audit. We will even testify in court or we will help with cases for the state against a fraudulent doctor. We've built strong relationships with a number of law firms doing this kind of thing. At the end of the day, it is still the reviews. We will do everything from the analytics and data reviews, all the way to eyes on the chart.

CEOCFO: *What might you pick up in a review that less experienced or less competent people might overlook?*

Ms. Loria: Because we look at so many charts in a day we are able to pick up the same types of trends, so when you see children getting braces before it is necessary or you see a particular kind of unbundling happening for dental services where somebody comes in for just a cleaning but instead they are getting x-rays and potentially even an extraction or cap, or a dentist performing these procedures on a child; that is not a typical thing that you would see. This is a red flag. We do so many of these audits, we know what to look for early and we will attach that to the record, or by using the data we will see that a physician might put in quite a bit for the same type of thing. You might want to see typical levels for a particular specialty and if a provider is billing for codes that are way beyond what his or her peers are billing for, we have learned to pick up those kinds of trends. For example, we do the same thing for durable medical equipment where we are looking at oxygen and we have been able to specialize in that. An area that we will get, which many of our competitors do not look at is ER up-coding. If you go into the emergency room and you feel sick, does the doctor keep you there very long or are they looking to diagnose you with potential things that you do not even have? Or are there ways that they are up-coding against the plan? We will look at that and that is all part of the review because that is based on the plan and the provider's relationship. They will have to review the contract and understand the guidelines that the plan is using, it's not just the CMS guidelines but also the plan of the policy that they have with the hospital. That is something we are not afraid to get in front of.

CEOCFO: *There is a lot of upheaval in the medical community and it looks like there is going to be more. How do you stay ahead of the changes and keep up with the regulations?*

Ms. Loria: Our clients hire us to be premiere consultants, otherwise they could be doing it in-house themselves. We are always watching the news. We are watching specific websites for any type of potential changes that may come down the pike before they even happen or before they are voted on. We go up to D.C. quite frequently to meet with CMS and the appropriate contacts where the true changes are being discussed before they are implemented. We have a variety of auditors that are spread across the U.S. We are able to have people specialize in different areas and each step is done with multiple clients so that they are able to stay in tune with what is going on in their market whether it is geographical or based on the client type. We have a rule that if one of the auditors needs to look something up, even with their 20+ years of experience, they have to write a blog about it. We produce a lot of content because of that. We also have quite a bit of free education so we suggest to our clients, potential clients, partners and people who we have educated (another service that we offer) that they allow us to provide educational services to new coders and other people that may want to become coders. We have them send us questions and we will research and respond so that keeps us (and them) extremely informed as well.

CEOCFO: *With people all over the country and although certified, how do you know when someone is presenting Advize Health the way you want from not only the technical perspective but from the people perspective?*

Ms. Loria: We evaluate every person on our team based on so much more than just the work they produce because it is extremely important for us that culturally, every person represents Advize Health on a daily basis the way that Advize Health should be represented. It is a matter of professionalism and attitude. We have goal meetings with our employees and we give real-time feedback (in the style of the One-Minute Manager) immediately. We have very particular documents and training around how we work with our clients. I personally go out and meet with clients at least once a year. We have clients of all different sizes all throughout the country. We have quarterly meetings in-between with management. "We know you have only asked us for XYZ but we also want to give you ABC as well to say that this is what our other clients are asking for and this is what is happening in the industry." We spend a lot of time in meetings. For our people, we will occasionally have office parties where people in Florida come to Tampa for the party (in person) and other employees and guests will attend via an online video service to add an element of interconnectivity.

CEOCFO: *What surprised you as Advize Health has grown and flourished?*

Ms. Loria: We are consistently able to produce complete and accurate work with a lean, dedicated staff. We feared that as we grew it would become hard to manage but we continue to produce a large amount of excellent work and that gives us an advantage.

CEOCFO: *What is ahead for Advize Health?*

Ms. Loria: We have been growing and I am very excited about that. We went from losing so much money a few years ago to now investing in our employees. We are helping our employees with education and giving bonuses and other perks

to people directly on the frontline. We are working on our new software. We created a software tool to help the healthcare community because we believe that it's important to give back to those who support us. We are helping nonprofits with their areas of risk because it is something we believe in. Because we provide services at a lower price point than our competitors, we are able to do more for people and companies who need the help. It gives us the ability to volunteer and give back which helps us stand out amongst our peers.

CEOCFO: *Is there anything that people might miss when they first look at Advize Health?*

Ms. Loria: We are in several spaces and I think that it might be a little bit confusing but Advize Health is focused on medical records audits and helping with fraud and abuse. How do they help an individual, how do they help a small to medium sized company get HITRUST certified, which is really around information security. It is really about understanding what our services mean and the value of Advize Health. We are a smaller firm, but what we bring to the table is quality. We bring tools, methodology and delivery which is the core of what we were built on and that sometimes is not necessarily picked up looking at our website.

