

UR Budget Provider Model QRC – Accessing Provider Model

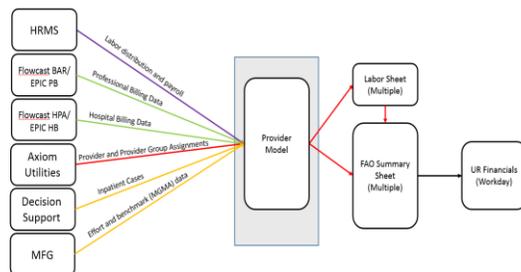
What is the Provider Model?

The Provider Model is your venue for budgeting key components that influence your overall budget.

This includes Provider:

- Effort
- Compensation
- wRVUs & ASA Units
- Encounters
- Cases
- Revenue

UR Budget Provider Data Flow



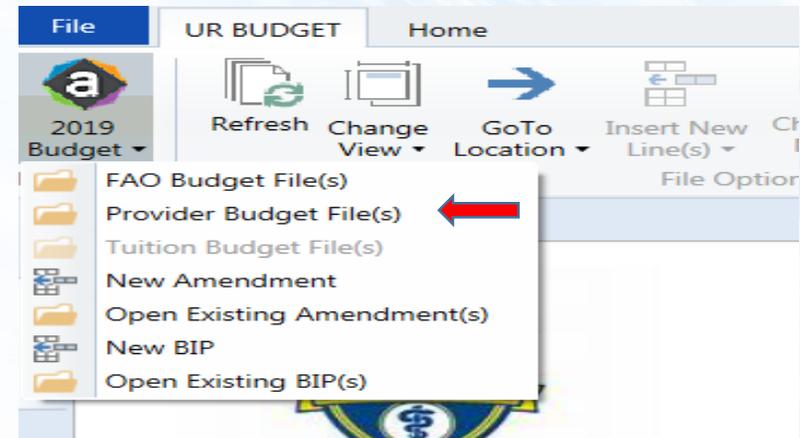
Who is a Provider?

- Anyone whose HR Home Department falls into the following companies:
 - CM040 SMD
 - CM050 SMH
 - CM060 SON
 - CM090 HSD
 - CM091 MFG
 - CM092 EIOH
- **AND** who is charged to one of the following Spend Categories (at least one instance in labor distribution file)
 - SC57550 Faculty HHS Salary Cap
 - SC57600 Faculty Full Time Salaries
 - SC57610 Faculty Part Time Salaries
 - SC57650 Faculty Summer Compensation
 - SC57700 Faculty Visiting Compensation
 - SC57860 Advanced Practice Provider

Dummy providers have been created to account for metrics and revenue for employees who fall outside of this definition (such as residents)

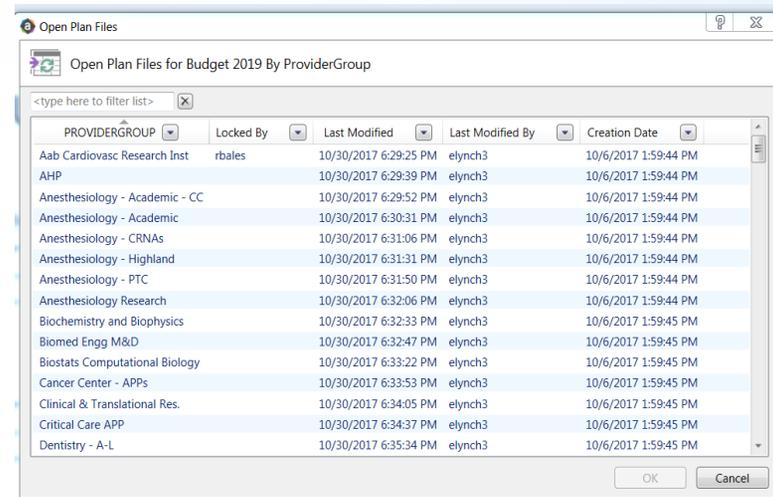
Accessing Provider Model

Open a Provider Budget File from the UR Budget navigation ribbon



Provider Groups will appear

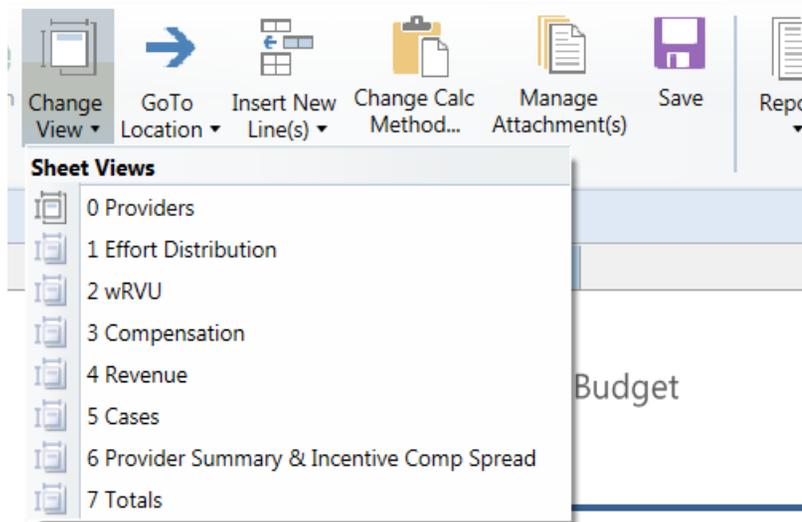
Select applicable group by typing in name, or selecting from list



UR Budget Provider Model QRC – Views and Add a New Provider

Provider Model Views

Once you have selected the applicable provider group you will begin to develop the budget components. The data input is organized by Views. It is recommended that you complete budget input in the order of the views, starting with View 0.



View 0 Providers

Select View 0, this will give you the list of the Providers in the Provider File. Review the listing for accuracy. If you need to add additional providers, click on:

>> Add New Provider (DBL CLK)

Add a New Provider

Fill in the requested information. Once you are at the wRVU view you will need to add applicable FAOs.

UR Budget Provider Model QRC – View 1 Effort Distribution

View 1 Effort Distribution

Effort Distribution should be completed for all providers (Clinicians and Researchers), however, excludes APPs. Effort should add up to 100% regardless if the provider is part-time or full-time **Effort total will be highlighted in red if not 100%.**

side %Tile Threshold starting on row 277

Budget	FY18			FY19	Comments
	Curr. Budget	Projection	Budget	Budget	
UR26891682 FACULTY					
Effort - Clinical	29%	29%	29%		
Effort - Administrative	0%	0%	0%		
Effort - Research	0%	0%	0%		
Effort - Academics	0%	0%	0%		
Effort - Contract/Other	0%	0%	0%		
Effort - Total	29%	29%	29%		
UR20629489 FACULTY					
Effort - Clinical	90%	90%	90%		
Effort - Administrative	0%	0%	0%		
Effort - Research	0%	0%	0%		
Effort - Academics	0%	0%	0%		
Effort - Contract/Other	0%	0%	0%		
Effort - Total	90%	90%	90%		
UR28547976 FACULTY					
Effort - Clinical	33%	33%	33%		
Effort - Administrative	0%	0%	0%		
Effort - Research	0%	0%	0%		
Effort - Academics	0%	0%	0%		
Effort - Contract/Other	0%	0%	0%		
Effort - Total	33%	33%	33%		
UR23532465 FACULTY					

To the far right, you will see effort spread by month evenly. If you want to change this based on a provider's start or stop date, you can zero out the value in the cell.

UR Budget Provider Model QRC – View 1 Effort Distribution

View 1 Effort Distribution – Definitions of Effort Categories

Clinical

- All billable physician activity (surgical time, scheduled clinics, inpatient services, hospital rounding), including activities with learners present
- Direct patient contact
- Indigent care
- Supervision of residents/fellows while seeing patients
- Chart review, documentation, and other office work related to clinical activity

Administration

- Department chair or chief duties
- GME program administration
- Medical director activities
- Other specified and defined time for hospital or practice administration

Research

- Funded research activity (salary supported by grant)
- Unfunded clinical research (protected time)
- Grant/proposal writing
- Other professional development/scholarly activities (e.g., papers)

Academics

- Didactic teaching
- Lectures and Grand Rounds
- Student mentoring

Contract/other

- External health systems contract with UR for professional services. Although this faculty effort might relate to clinical effort, if UR does not bill and collect for these professional services (e.g., faculty time purchased at an hourly rate), and individual faculty are not credited with collections and WRVUs, then this effort should be tracked separately.

UR Budget Provider Model QRC – View 2 wRVUs

View 2 wRVUs (or ASA units)

Warning: 8 Rows outside %Tile Threshold starting on row 277

Budget	Company	FY17 Actuals	FY18 YTD P5 Actuals	FY18 Curr. Budget	FY18 Projection	FY19 Budget
Total wRVU	CM091	0	24	0	57	57
OP347374 - Dermatology Highland POB	CM091					
Target wRVU	CM091				5	5
Incentive wRVU	CM091				0	0
Total wRVU	CM091	8	2	0	5	5
OP349524 - Practice Account Med Derm	CM091					
Target wRVU	CM091				1,419	1,419
Incentive wRVU	CM091				0	0
Total wRVU	CM091	2,343	591	2,289	1,419	1,419
>> Add New FAO (DBL CLK)						
Totals						
Total Target wRVU					1,480	1,480
Total Incentive wRVU					0	0
Total wRVU		2,350	617	2,289	1,480	1,480
Total wRVU Benchmark % (Acad.)					66 Percentile	27 Percentile

Input Target wRVUs and Incentive wRVUs for FY18 Projection and FY19 Budget by FAO. If applicable, ASA Units will replace wRVUs

- Columns 1-2, activity will be loaded in total
- Columns 3-4, activity should be input as Target and Incentive wRVUs
- Benchmark % will appear calculating how the wRVU productivity input compares to the MGMA benchmarks for that specialty
- To the far right of the screen is the wRVU spread by month. This defaults to working days and will incorporate provider start and stop months. You can modify the spread for seasonality by typing over the numbers. **IMPORTANT: once you modify numbers in cell it will break the formula for the pre-populated spread.**

UR Budget Provider Model QRC – View 3 Compensation

View 3 Compensation

The Compensation View reflects the most recent HRMS compensation data for your providers. Through this screen you can make modifications to the following attributes:

- ❑ FAC, Jobcode, Compensation allocation %, Standard Hrs, Salary or Hourly, Full-time or Part-time, Comp. Rate, Comp Incentive, and Start Month and Stop Month for the providers.
- ❑ Yellow cells indicate that a field can be modified. If you double click on a yellow cell with a drop down box will appear with pre-populated choices.

FAC	FAC Description	JobCode	JC Description	Comp Alloc %	Comp Std Hrs	FTE	Sal/ Hrly	FT / PT	Status	Start Mth
...	SC57600 Faculty Full Time Salaries	...	J0003 Assoc Professor	100.00%	40.00	1.00	S	F	A	
SC57600	Faculty Full Time Salaries	J0003	Assoc Professor	54.00%	40.00	0.54	S	F	A	1
SC57600	Faculty Full Time Salaries	J0003	Assoc Professor	46.00%	40.00	0.46	S	F	A	1

- ❑ At the top of the screen is a Yellow box for Comp Incr %. This Is a global driver for all providers in the provider group. If you input a %, for example, 2%, it will apply that increase to all providers. If the increases are not consistent, you may input an increase for each Provider individually.

Comp Curr Rate	Comp Incr %	Comp New Rate	Comp Target	Comp Incentive	Comp Total	Academic Comp Benchmark	Benefit Level	Benefit Rate	Total Benefits
	0.00%	<< Default Comp Increase							
475,000	0.00%	475,000	475,000	0	475,000	90 Percentile	1	11.1%	52,677
475,000	0.00%	256,500	256,500	0	256,500		1	11.1%	28,446
475,000	0.00%	218,500	218,500	0	218,500		1	11.1%	24,232
350,000	0.00%	350,000	350,000	0	350,000	69 Percentile	1	14.5%	50,890
350,000	0.00%	115,500	115,500	0	115,500		1	14.5%	16,794
350,000	0.00%	234,500	234,500	0	234,500		1	14.5%	34,096
0	0.00%	0	0	0	0		1	14.5%	0

IMPORTANT – once you input an increase by provider, it breaks the GLOBAL INCREASE FUNCTIONALITY.

UR Budget Provider Model QRC – View 4 Revenue

View 4 Revenue

Current Data

Data fed from wRVU view

Budget	Current Data			Data fed from wRVU view			Rate Incr %	Comments
	FY17 Actuals	FY18 YTD P5 Actuals	FY18 Curr. Budget	FY18 Projection	FY19 Budget	Flag		
Target wRVU				1,800	1,900			
Incentive wRVU				500	600			
Total wRVU	2,343	591	2,289	2,300	2,500			
Encounters (Visits)	2,557	614	1,585	2,388	2,596			
Gross Charges	(\$589,670)	(\$151,685)	\$0	(\$590,044)	(\$654,180)			
Gross Charges / wRVU	(\$251.70)	(\$256.54)	\$0.00	(\$256.54)	(\$261.67)		2.0%	
Contractual Allowance	\$375,545	\$100,629	\$0	\$391,441	\$433,989			
Net Revenue	(\$214,125)	(\$51,056)	\$0	(\$198,604)	(\$220,191)			
Net Revenue / wRVU	(\$91.40)	(\$86.35)	\$0.00	(\$86.35)	(\$88.08)		2.0%	
Collection Rate	36.3%	33.7%	0.0%	33.7%	33.7%			

If you need to adjust Net Revenue/wRVU due to changes in service mix or payor mix, consult with your finance liaison and add comments explaining why

View 4 Revenue will summarize:

- Your current wRVU's, Encounters, Gross Charges/wRVU, Current Contractual Allowances, Net Revenue, Net Revenue/wRVU, and Collection Rate.
- The WRVU's that you input in View 2 will be carried over to this view in the FY18 Projection Column and the FY19 Budget Column.
- Based on the Current Ratio of Encounters to wRVUs, FY18 Projection and FY19 Budgeted Encounters will populate automatically.
- Using the Current Ratio's for Gross Charges/ wRVU, and Net Revenue / wRVU, Total Charges and Total Revenue will be calculated applying these ratios to the wRVU's (Projected and Budgeted) input in View 2.
- Global increases for Charge and Rate increases will be automatically applied.
- If this is the first year you are inputting wRVU's you will need to fill in the Encounters, and Charge and Revenue ratios per wRVU to populate the total charges and revenue.

UR Budget Provider Model QRC – View 5 Cases

View 5 Cases

Case Budget View

Columns defined:

- Provider / FAO / Metric = Provider name with case types below
- Status = C (Current provider)
- FY17 Actuals = Prior year actual cases by case type (when available)
- FY18 YTD Actuals = Year to date cases
- FY18 Curr. Budget = Cases budgeted for the current fiscal year
- FY18 Projection = Projection of current fiscal year actual cases – this field is editable and should be adjusted to reflect and changes to the straight annualization (ex. Provider starting mid-way through year, provider on disability, etc.)
- FY19 Incremental = Addition or reduction of cases from the FY18 Projection to create the FY19 Budget
- FY19 Budget = FY18 Projection plus the FY19 Incremental
- Comments = Input field for comments

Rows defined:

- Total Stat – Cases = Sum of all entered values
- Inpatient Cases = Sum of inpatient cases entered for SMH and HH below, note that HH has no historical data, just provide FY18 projection and FY19
 - SMH = Strong inpatient discharges
 - HH = Highland inpatient discharges
- OR Cases = Sum of Adult and Pediatric cases entered below
 - Adult = Adult OR cases at SMH
 - Pediatric = Pediatric OR cases at SMH
- Sawgrass = OR cases at Sawgrass
- Strong West = OR cases at Strong West

TR00055 Oncology Provider Group

Provider Revenue, Stats, and Comp Budget

View: 5 Cases

Provider / FAO / Metric

Warning: 1 Row outside %Tile Threshold starting on row 445

Provider / FAO / Metric	Status	FY17 Actuals	FY18 YTD Actuals	FY18 Curr. Budget	FY18 Projection	FY19 Incremental	FY19 Budget	Comments
Marge Mccormack								
Total Stat - Cases	C(Current)	240	60	255	315		236	
Inpatient Cases		240	60	255	315	(79)	236	
SMH		240	60	255	315	(79)	236	25% fewer cases because of reduced workload at SMH
HH		0	0	0	0	0	0	
OR Cases		0	0	0	0	0	0	
Adult		0	0	0	0	0	0	
Pediatric		0	0	0	0	0	0	
Sawgrass		0	0	0	0	0	0	
Strong West		0	0	0	0	0	0	

UR Budget Provider Model QRC – View 6 Provider Summary and Incentive Comp Spread

View 6 Provider Summary and Incentive Comp Spread

ntive Comp Spread	Flag	Comp New Rate	Comp Incentive	Comments	FY19 July	FY19 August	FY19 September
Contractual Allowance					49	44	51
Net Revenue					(19)	(17)	(19)
Net Revenue / wRVU					(47.5)	(47.5)	(47.5)
Collection Rate					27.5%	27.5%	27.5%
Target Comp		0	0		0	0	0
Comp Incentives					0	0	0
Total Comp							
Benefits					0	0	0
OP349524 - Practice Account Med Derm							
Target wRVU					120	109	126
Incentive wRVU					0	0	0
Total wRVU					120	109	126
Encounters (Visits)					125	113	130
Gross Charges					(31,420)	(28,563)	(32,848)
Gross Charges / wRVU					(261.7)	(261.7)	(261.7)
Contractual Allowance					20,844	18,949	21,792
Net Revenue					(10,576)	(9,614)	(11,056)
Net Revenue / wRVU					(88.1)	(88.1)	(88.1)
Collection Rate					33.7%	33.7%	33.7%
Target Comp		150,687	10,000		12,557	12,557	12,557
Comp Incentives					846	769	885
Total Comp							
Benefits					2,249	2,241	2,253

In View 6, you will see the provider activity in total by FAO

This is also the view where you will check the Incentive **1** amount and review the Incentive Spread **2**. The incentive spread already defaults to the calc. working days. If you would like to change this, you can overwrite the amounts in the cells. The incentive spread should be consistent with how the wRVU's and revenue are spread.

UR Budget Provider Model QRC – View 7 Totals

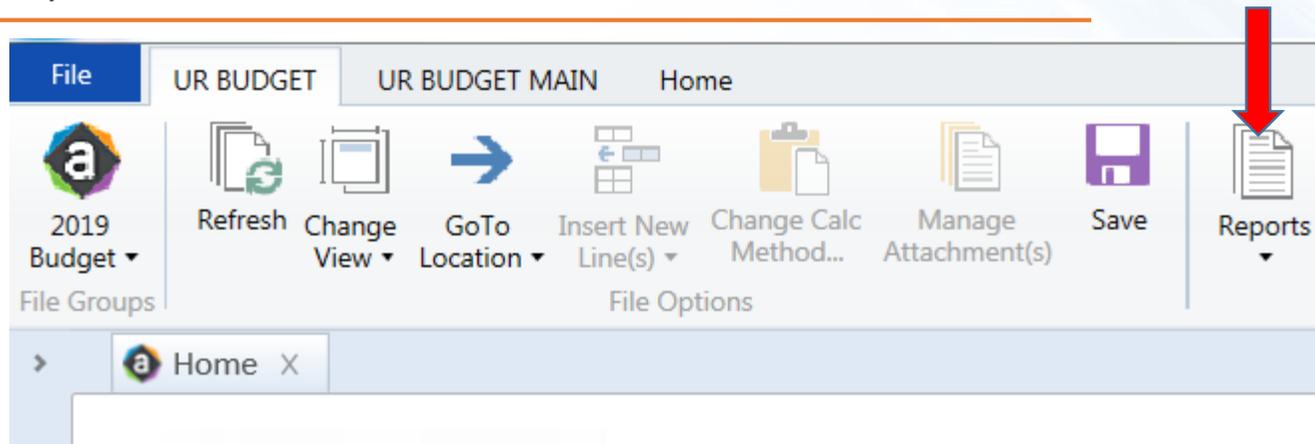
View 7 Totals

	Company	FY17 Actuals	FY18 YTD P5 Actuals	FY18 Curr. Budget	FY18 Projection	FY19 Budget	Flag
	CM040						
Total Net Revenue		(\$214,668)	(\$55,206)	\$0	(\$208,565)	(\$230,351)	
Total Target wRVU					1,861	1,961	
Total Incentive wRVU					500	600	
Total wRVU		2,350	617	2,289	2,361	2,561	
Total wRVU Benchmark % (Acad.)				66 Percentile	68 Percentile	72 Percentile	
Total Encounters		2,566	660	1,585	2,499	2,707	
Inpatient Cases		0	0	0	0	0	
Effort - Clinical		0%	0%	29%	29%	29%	
Total Target Comp		\$264,296	\$76,181	\$0	\$0	\$126,969	
Total Comp Incentives		\$0	\$0	\$0	\$0	\$0	
Total Comp		\$264,296	\$76,181	\$0		\$126,969	
Total Comp Benchmark % (Acad.)				9 Percentile		9 Percentile	⊗
Total Benefits		\$0	\$0	\$0		\$21,801	

The Totals view summarizes the information by provider. Red flags appear if the results of data input show a misalignment between productivity and compensation. This does not necessarily indicate you need to change your numbers but may require explanation.

UR Budget Provider Model QRC – Reports

Reports



Provider Model Reports can be accessed on the UR Budget tool bar by clicking on Reports, **Select: Provider Planning Reports**

Reports available

URB301 List of Providers

- This report provides you a listing of all providers in the provider group. It includes Provider Name, UR ID, Jobcode, Employee Type (Faculty or APP), and the Home Company.

URB303 Provider Budget Summary by FAO

- This report provides a summary of all the data you entered in the Provider Model by provider by FAO.
- There are different views you can select for this report. The first report that appears is the **reconciliation report**. This includes less data, and is the report you will use to reconcile the data entered in Provider to the FAO Summary and Labor files. (this includes compensation and revenue data)
- By clicking on **Refresh**, it will prompt you to select the Provider Group, and or FAO.
- Data will be refreshed. You can print the data and share with the FAO Summary and Labor owners.
- By Clicking on **Change Views**, you can change the report to include more data. You can look at only the **FY19 Budget Data, the FY18 Projection Data, or the Full Report**. These views will include statistics in addition to the compensation and revenue data.

UR Budget Provider Model QRC – Reports

Reports

Reports available

URB304 Provider Budget Summary by Provider

- Select the report, the blank report will appear, click on Refresh, and choose the year and provider group.
- By clicking on Change Views, you can select to see only: Budget, Projection, or the Full Report.

Printing Reports

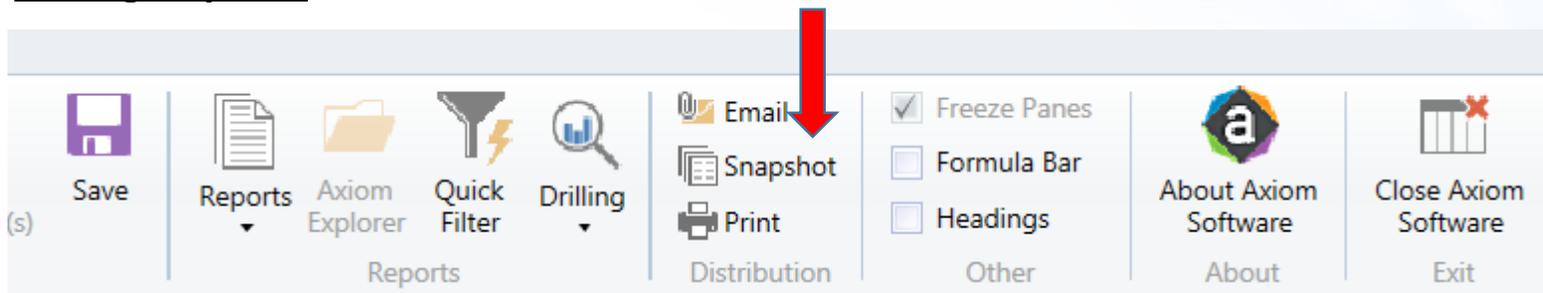
- The two reports that are printable are:

URB301 List of Providers

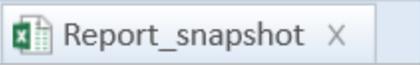
URB303 Provider Budget Summary by FAO – in the Reconciliation View

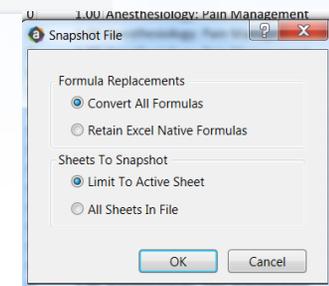
The other reports and views are very large – you can save the reports and open the data and manipulate, pivot, etc..

Saving Reports



When you have your report open on the screen, click on **Snapshot**, in the tool bar. Click OK when the Snapshot File message appears.

You will see:  in the ribbon.



Right click on: Report_snapshot and you can save the file as a local file.