

“Cash Client Revolution” (CCRev)

Business, Marketing and Administration Training for Physical and Occupational Therapists

Course Objectives

By IndeFree Association

Contact Hours: **16 hours**

The course includes:

- 1 Instructor
- 1 Assistant
- 1 Powerpoint presentation
- 1 Manual – “Cash Client Revolution” Workbook”
- 12 Sample forms, tools and documents
- 1 Certificate of completion
- 1 Username and password to an online self-study guide for post-workshop reference

At the conclusion of the course, the learner will be able to...

- I. Documentation
 - 1. Demonstrate how to properly and legally complete evaluations with a cash client patient.
 - 2. Demonstrate how to complete Daily Notes properly and legally for the cash client patient.
 - 3. Demonstrate how to perform “self-audits” and properly grade them.
- II. Medicare Rules and Regulations
 - 1. Understand CMS rules on determining acceptable rates for Medicare beneficiaries.
 - 2. Demonstrate how to apply the ABN with Medicare beneficiaries paying cash for services.
 - 3. Demonstrate how to use the KX, -52, GA, GX, GY ad GZ modifiers.
- III. Insurance Laws
 - 1. Understand the conditions of participation with an insurance plan.
 - 2. Understand how to properly interpret the “Conditions of Participation”.
 - 3. Demonstrate what procedures to take if an insurance patient chooses to “opt-out” of using their insurance.
 - 4. Demonstrate the proper use of forms, waivers, and privacy policies.
- IV. Marketing Ethics
 - 1. Demonstrate how to ethically market for direct access and cash clients.
 - 2. Understand how to properly use “Testimonials” in marketing and stay compliant with HIPAA and SEC laws.
- V. Administrative Concerns

1. Implement proper administrative policy on how to manage patient authorizations and waivers.
 2. Demonstrate the proper use of staff/employee training on HIPAA and SEC laws.
 3. Understand the difference between an “Insurance Patient” and “Cash Patient”.
 4. Recite HIPAA requirements on patient privacy regarding marketing and the use of patient testimonials.
- VI. Employee Training
1. Describe the requirements to fulfill HIPAA law
- VII. Forms, Tools and Resources
1. Learn how to create Policies and Procedures for Clinical Excellence
 2. Demonstrate how to perform documentation “self-audits” and grade them properly.
 3. Recite the legal components required for documentation compliance.

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