FINANCIAL RESILIENCY TUNE-UP FOR HEALTHCARE PRACTICES

WSHLA | ECHELON HEALTH PARTNERS | February 24, 2026

ABOUT ECHELON HEALTH PARTNERS

- Echelon Health Partners is a **national healthcare advisory and growth firm** specializing in:
  - Infusion, specialty, and FQHC models
  - Integrated clinical, operational, and financial strategy
  - Data-driven revenue optimization

- Creators of the **RevPulse Platform**, delivering structured visibility and performance accountability for independent practices.

PEOPLE

What teams experience

PROCESS

What's happening operationally

TECHNOLOGY

What your system captures

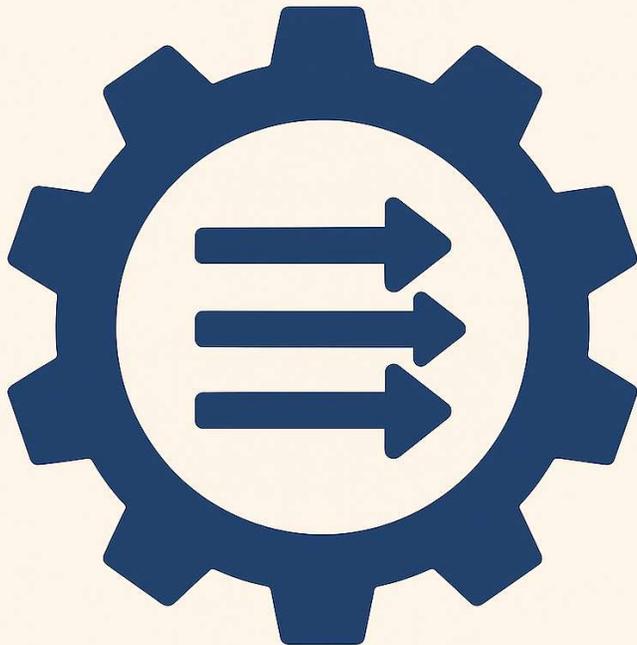# HOW WE EVALUATE PRACTICES

PEOPLE   PROCESS   TECHNOLOGY

PRACTICE AREA #1 PEOPLE

- End-to-end ownership and role clarity
- Cross-team handoffs and escalation structure
- Training, staffing, and capacity alignment
- Accountability tied to measurable outcomes
- Leadership operating rhythm (weekly + monthly)

PROCESS

- Standardized intake and authorization workflows

- Reliable charge capture and documentation

- Routine QA/QC and root-cause analysis

- Defined denial and escalation pathways

- Real-time operational and financial visibility

- Workflow enforcement and automation

- Early-warning performance indicators

- Root-cause and trend analytics supported by RevPulse

TECHNOLOGY
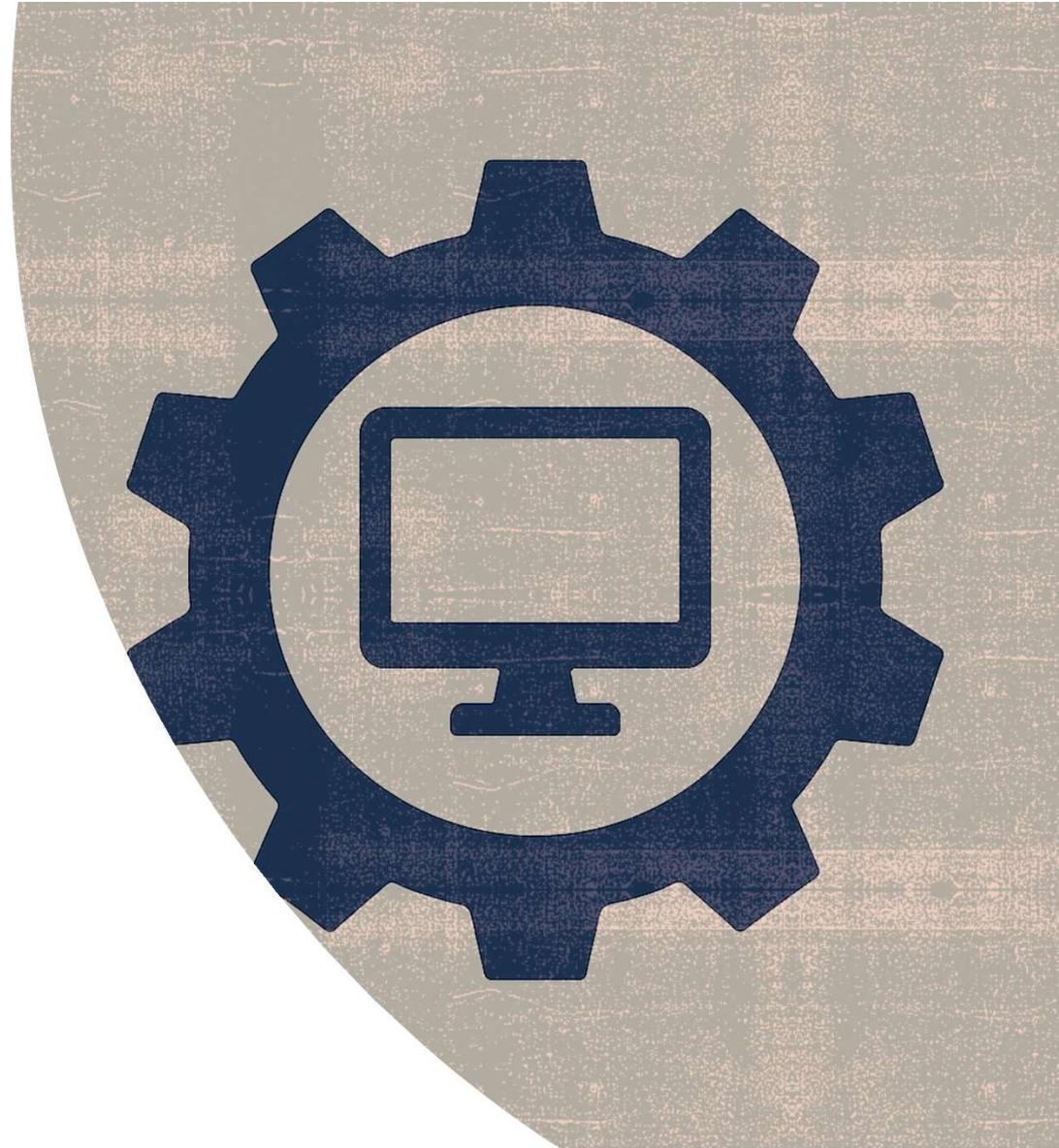
3 KEY AREAS THAT DETERMINE FINANCIAL RESILIENCY

Cash & Liquidity Health

Days in AR

Net collection rate

Cash runway

Revenue Cycle Integrity

Preventable denial rate

First-pass resolution

Underpayment trends

Operational Cost & Capacity Alignment

Staffing ratio & alignment

Posting lag

Provider productivity vs volume

REGULAR QA/QC IS A BUSINESS DISCIPLINE

- **Packet completeness** (eligibility, auth, orders, required documentation)

- **Documentation audits** (coding support, timeliness, medical necessity)

- **Denial root-cause review** (trend + source identification, not just rework)

➤ Business review templates and content supported by **RevPulse**

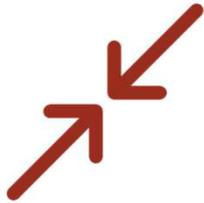# WHAT A STRONG BUSINESS REVIEW LOOKS LIKE

78

$

23%

- 5-7 actionable metrics only
- Clear owner per metric
- Trend and variance analysis

➢ **RevPulse** dashboards to support visibility & consistency

OPERATIONAL OKRS DRIVE STABILITY

(OBJECTIVES AND KEY RESULTS)

Reduce preventable
denials by X%

Improve auth
turnaround to Y days

Shorten posting lag
to Z days

Progress tracked in RevPulse

Rising denials and cash flow instability

Intake and authorization gaps identified

Standardized workflows implemented

Significant reduction in preventable denials

USE CASE: FRONT-END BREAKDOWN (SPECIALTY PRACTICE)

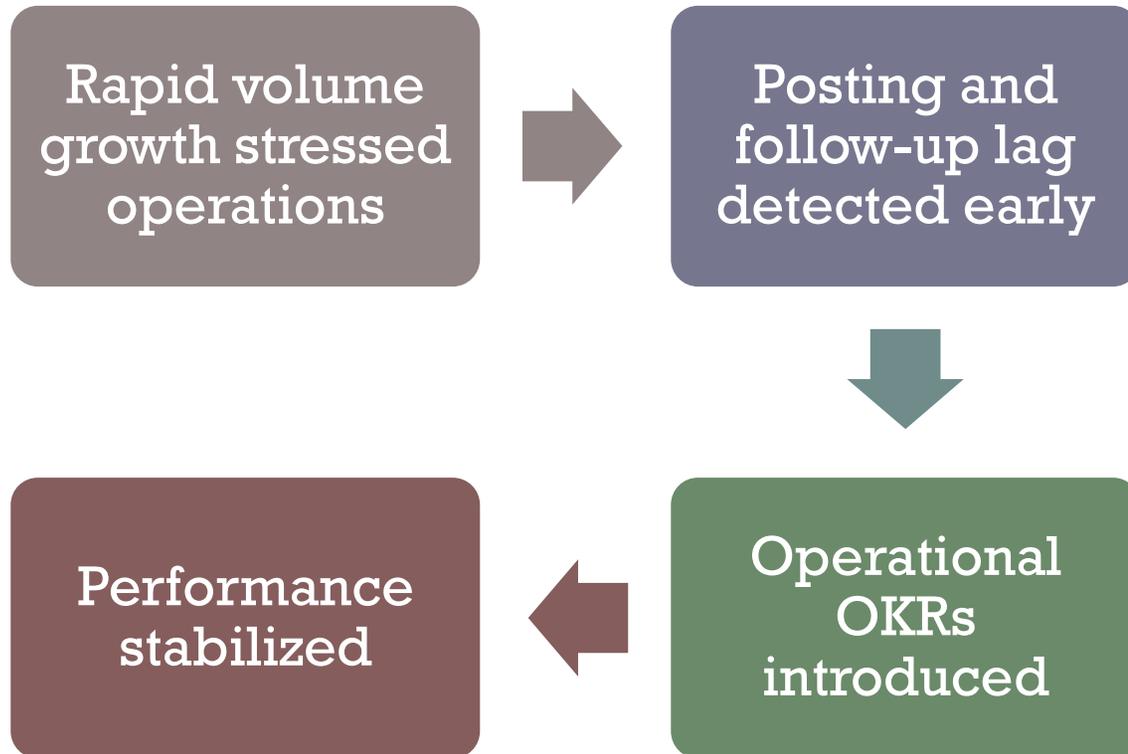Reported AR masked collectability issues

MBR metrics streamlined

Ownership assigned per metric

Earlier intervention and stabilization

USE CASE: AR VISIBILITY GAP (FQHC)

TOOLS THAT SUPPORT RESILIENCY

People

SOPs

Onboarding

Training refreshers

Process

Intake checklists

QA/QC templates

Denial playbooks

Technology

Central visibility

Alerts

Consistent metrics

FROM ALIGNMENT TO RESILIENCY

- People + Process + Technology
  → Operational Discipline
  → Financial Predictability
  → Practice Resiliency

- Resiliency isn't a reaction to disruption —
  it's the result of disciplined alignment
  every day.

YOUR QUESTIONS

?

Where does ownership break down most?

What metric would you tighten first?

How often do you review QA/QC today?

THANK YOU!

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"Financial resiliency isn't built through heroics or one better report — it's built through disciplined alignment across people, process, and technology."

ECHELON HEALTH PARTNERS
STRATEGY.EXECUTION.GROWTH

RevPulse

Building smart, resilient healthcare systems