

TEAM UP Revenue Optimization Workgroup  
Revenue Optimization Planning Worksheet

Health Center: \_\_\_\_\_

Date: \_\_\_\_\_

Please utilize the following worksheet to establish revenue optimization targets for BHI services and outline your plans for meeting these targets over the next three months.

| Activity   | Plans  |
|--|--|
| <b>Establish Current Baseline Performance</b>  |  |
| Document your <u>current status</u> regarding revenue optimization.                              | <p><i>If you are establishing a revenue goal, utilize the TEAM UP Revenue Model to assess performance for the most recent month, include the following:</i></p> <p><i>Cell C12: Number of billable visits per month</i></p> <p><i>Cell C14: Number of billable collateral encounters per month</i></p> <p><i>Cell F26: % BHC salary supported by revenue</i></p> <p><i>If you are establishing a goal related to your revenue cycle or otherwise, please describe where you are starting from in terms of this work.</i></p> |
| <b>Set a Goal</b>  |  |
| Describe your <u>short-term</u> (3-month) target.  | <p><i>What is the short-term goal you are working towards and your timeframe for accomplishing it? For example:</i></p> <p><i>'Our goal is to increase the % BHC salary supported by revenue from 30% to 40% by September 30th, 2020.'</i></p>   |
| <b>Plan Activities to Meet your Goal</b>   |  |
| Describe your <u>planned activities</u> to meet your goal.                                       | <p><i>List out and describe in detail the activities you plan to undertake to achieve your goal. What strategies will you test out and implement to accomplish your goal? Who from your health center will be leading or supporting these efforts?</i></p>   |
| <b>Identify Facilitators and Challenges</b>  |  |
| Identify any <u>necessary supports and anticipated challenges</u> that may impact your progress. | <p><i>Please describe any components that will facilitate your work.</i></p> <p><i>What challenges do you anticipate encountering, and how do you plan to address them?</i></p>  |
| <b>Monitoring Plan</b>   |  |
| How will you <u>monitor your progress</u> ?  | <p><i>How will you measure your progress and evaluate the effectiveness of your efforts and activities? How will you know that a change is an improvement? Include the specific quantitative and qualitative data or metrics you plan to use.</i></p>  |

**Please note:** The BMC Implementation Team is available to support any aspect of your revenue optimization work. Please send all requests to Grace ([grace.riordan@bmc.org](mailto:grace.riordan@bmc.org)).