



Stakeholders Roles and Expectations

Purpose: Clearly define the roles, expectations, and KPIs for executing for all stakeholders of Occtegrity's MSD Evidence-based Care (EBC) Pathway process.

Goal: Achieve the best musculoskeletal evidence-based treatment outcomes for injured employees, return them back to full-duty work as soon as possible with a high level of employee/patient satisfaction, and lower treatment and indemnity costs.

Stakeholders: CLIENT – the employer, employees - patients, Occtegrity, Occtegrity EBC Select Provider Panel, TPA – the Third Party Administrator, and BROKER – the Broker.

Aligned Occtegrity Beliefs:

- Unwarranted variation leads to unnecessary personal, business, and social burdens
- Interdisciplinary teams that honor Evidence-based Care produce new value.
- Path to the Right Care is influenced by key employee touchpoints.
- Healing begins when people feel understood and engaged.
- Aligned goals create a collaborative framework between Occtegrity, employers, employees, providers, and partners.

Key Role: Lead the implementation and ensure the on-going success and goal achievement of the MSD Evidence-based Care (EBC) Pathway process.

Specific Stakeholder Expectations of Occtegrity:

Leading Occtegrity Belief:

- Interdisciplinary teams that honor Evidence-based Care produce new value.

- Assign an Occtegrity Account Manager who leads the implementation process and ensures on-going program success
- Define and ensure SPP execution of Service and Quality Standards for Practice Evidence-Based Care Pathways
- Create a collaborative framework of participation of EBC pathway and excellence between among and between all stakeholders.
- Monthly KPI Reporting

Leading Occtegrity Belief:

- Path to the Right Care is influenced by key employee touchpoints.

- Provide LOCATION Manager communication materials describing initiative/timing/process
- Provide local SPP contact for each CLIENT location/site manager contacts
- Facilitate CLIENT Manager and Occtegrity SPP introduction

Leading Occtegrity Belief:

- Healing begins when people feel understood and engaged.

- Ensure and Measure CLIENT employee/patients satisfaction
 - Immediate communication to SPP when care delivery does not meet patient expectations.

Leading Occtegrity Belief:

- Aligned goals create a collaborative framework between Occtegrity, employers, employees, providers, and partners
- SPP Collaboration and relationship development with CLIENT Managers to understand work processes, etc. to facilitate proactive suggestions to prevent future MSD injuries
- Define all operational, billing process, and reporting processes with TPA (TPA) and actively resolve arising issues in a timely manner
- Maintain and communicate overall detailed implementation project plan

Key Occtegrity Metrics and KPIs

- Occtegrity is responsible to collect and report on EBC Pathway data. This includes:
 - Leading Indicators
 - First Provider Seen
 - Spend Timeframe
 - Employee/patient Survey
 - Touchpoint Influencers Engaged
 - Lagging Indicators
 - Medical Costs
 - Indemnity Costs
 - Expense Costs
 - Reserve Amount
 - Treatment Days
 - Employee/patient Satisfaction

Occtegrity Select Provider Panelists' Roles and Expectations

Key Role: Deliver MSD Evidence-based Care to Client Employee/Patients

Specific Stakeholder Expectations of the Occtegrity Select Provider Panel:

Leading Occtegrity Belief:

- Interdisciplinary teams that honor Evidence-based Care produce new value.
- Follow Service and Quality Standards; Practice Evidence-Based Care Pathways
 - Review and execute Occtegrity endorsed treatment algorithms
 - Collect data from the STarT BackTool at the first visit with patients presenting with back pain
 - Collect data from the OSWESTRY tool; Neck and Back Index or DASH to establish functional baseline
- Keep patient working or returned to work as soon as possible

Leading Occtegrity Belief:

- Healing begins when people feel understood and engaged.
- Obtain patient approval to participate in Satisfaction Survey process
 - At time of first visit
 - 10 days after first visit

Leading Occtegrity Belief:

- Aligned goals create a collaborative framework between Occtegrity, employers, employees, providers, and partners
- Timely submission of claims to TPA
- Input and report Patient data into Occtegrity system no later than after 2nd visit
- Participation in Quarterly SPP Webinars and/or collaboration meetings
- Collaboration and relationship development with CLIENT Managers to understand work processes, etc. to facilitate proactive suggestions to prevent future MSD injuries

Key Metrics and KPIs

- Adherence to EBC and Occtegrity algorithms
- Patient Satisfaction
- Timely Data submission
- Collaboration involvement

Key Role: Commitment to the objects of the Occtegrity EBC Pathway program, take ownership of employee/patient treatment and administration process, and devote necessary resources.

Specific Stakeholder Expectations of Menards:

Leading Occtegrity Belief:

- Aligned goals create a collaborative framework between Occtegrity, employers, employees, providers, and partners
- Affirm and communicate goals to all stakeholders
- Assign Overall Implementation contact
- Operational (Stores) contact to coordinate communication
- Define Point of contact for Occtegrity SPPs
- Define Point of contact for CLIENT
- Define Points of contact for each CLIENT (Store Manager or HR contact)
- Support for SPP's to collaborate with CLIENT Managers to help them understand work processes to allow SPP to provide suggestions that may prevent injuries

Key Metrics and KPIs

- Percentage of Touchpoints and Point-of-Contacts fully engaged
- Occtegrity compliance with objectives
- TPA compliance with objectives

Key Role: Timely data collection and reporting to Occtegrity, and timely bill resolution and payment to Occtegrity Select Providers.

Specific Stakeholder Expectations of Third Party Administrator:

Leading Occtegrity Belief:

- Aligned goals create a collaborative framework between Occtegrity, employers, employees, providers, and partners
- Payment transaction data for each new injury claim every two weeks
- Claim Summary Data (Services, Indemnity Expenses, Net Paid, Reserve and Incurred) for all new injuries claims every two months
- PPO Discounts will not be applied below the State Fee Schedule
- Providers are paid within 30 days of receipt of claim
- Claim denials will be forwarded immediately for resolution to Occtegrity VP of Clinical Strategy
- Unpaid claim report every two weeks showing all unpaid claims for all Occtegrity TIN #s

Key Metrics and KPIs

- Timeliness and completeness of Data Reports to Occtegrity
- Percent of fees paid at State Fee Schedule
- Percent of bills paid within 30 days

Key Role: Fully participate through adherence to treatment process and communication.

Specific Stakeholder Expectations of Client:

Leading Occtegrity Belief:

- Healing begins when people feel understood and engaged.

- Keep treatment appointments
- Respond to Survey

Key Metrics and KPIs

- Percent of kept treatment appointment
- Percent of responses to surveys

Key Role: Commitment to, and support of the objects of the Occtegrity EBC Pathway program.

Specific Stakeholder Expectations of Client:

Leading Occtegrity Belief:

- Aligned goals create a collaborative framework between Occtegrity, employers, employees, providers, and partners
- Provide guidance, assist in facilitation, and hold accountable the stakeholders.

Acknowledgement and Commitment

Each stakeholder below acknowledges their respective roles and commits to all other stakeholders to give their best efforts to fulfill their roles as defined in support of the Purpose and Goal Statements in this document.

Occtegrity
Signature

Printed Name

Date

CLIENT - Employer
Signature

Printed Name

Date

TPA - TPA
Signature

Printed Name

Date

BROKER- Broker
Signature

Printed Name

Date