Quality Management in Financial Management Services

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Building Blocks of Quality Assurance

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Quality Management

1. Plan
2. Implement
3. Access
4. Report
5. Monitor
6. Lessons Learned
7. Continuous Improvement
8. Identify Requirements
Polling Question #1

Who serves as the focus for quality activity in your organization?

A. Top management
B. Quality department staff
C. A specific individual
D. Quality team with multi-functional representatives
E. No one
QA Driving Force

Whether this is one person or a small group, a driving force serves as a focal point for quality initiatives and can help ensure a consistent level of attention and energy on quality matters.
Risk Management involves identifying and monitoring areas where there is a potential for errors or problems and having procedures or action steps in place to minimize or mitigate problems.
Compliance Activity

Compliance Activity involves staying up-to-date with changing requirements by monitoring federal and state laws, contract or program requirements for changes and ensuring that the organization meets these requirements.
Internal Audits

A system of internal audits can help an organization understand how it is performing against its operating procedures. Audits on important processes and data will help areas needing reinforcement or change.
Corrective Action Process

When complicated problems are detected, it is helpful to have a system that allows for the determination of the correct solution and ensures the implementation of that solution produces the desired improvement.
Anti-Fraud Activity

Whether the suspicious activity is inside a program or against your own agency, taking actions to prevent, detect and report potential fraud, waste and abuse is a high priority for CMS.
Education and Awareness

Employees should receive an initial orientation to Quality Assurance upon hire and other educational or awareness activities should be conducted throughout the year to help maintain focus.
Especially in service-based organizations, strong Customer Service performed in a specific department and/or by individuals throughout the operation is critical to providing support to the customer.
Satisfaction Survey System

One way to collect feedback about your organization is to survey customers and other stakeholders for their level of satisfaction with the services or products you provide.
Monitoring of Performance Metrics

These statistical indices of various operating activity levels can be very useful in detecting things such as problematic trends or supporting manpower requirements.
Document Control System

A document control system enables the organized and controlled retention of documents used in the business operation and should provide easy access to the most current versions of documents.
Operating procedures are the basis for any organization to promote consistent and desirable results. Procedures that contain built in monitoring/control mechanisms also provide regular self-checking to allow detection of problematic events.
Polling Question #2

How many activities discussed today does your organization use?

A. All 12
B. 8-11
C. 5-7
D. 2-4
E. 1 or less
Quality Management

- Encourage Mutual Respect and Teamwork
- Improve Continuously
- Quality Management Principles
  - Produce Quality Results the First Time
- R & R Resources and Requirements
- Have a Strategic Approach to Quality Program
3 P’s of SUCCESS

• PLAN

• PEOPLE

• PROCESS