

Operational Transformation Playbook

From detailed assessment to executable operating plan

A practical guide for PRN operational, clinical, revenue-cycle, growth, technology and analytics leaders.

September 2026

How to Use This Playbook

This playbook translates the detailed transformation assessment into an operational sequence. Each recommendation is tied to a workstream, delivery classification, capability status, transformation phase and supporting detail in the Detailed Transformation Assessment.

ACTIVATE & OPTIMIZE	Use existing capability more effectively.
CONFIGURE & STANDARDIZE	Create a consistent enterprise operating model.
ENABLE & ADOPT	Close training, workflow and adoption gaps.
DEPLOY	Operationalize newer capabilities and active initiatives.
INTEGRATE	Connect Raintree to external platforms and workflows.
INNOVATE	Manage roadmap and next-horizon opportunities through governance.

0–120 Day Operating Roadmap

0–30 DAYS

Validate enterprise standards, activate quick wins, establish governance and baseline KPIs.

31–60 DAYS

Standardize workflows, expand adoption, deploy targeted automation and close priority configuration gaps.

61–90 DAYS

Scale cross-functional workflows, integrations and measurement; resolve dependencies.

91–120 DAYS

Institutionalize operating cadence, measure outcomes and move next-horizon items into governed plans.

01 38 current recommendation items. Validate the customer-facing language and supporting evidence before final delivery. Front Office & Patient Access

1 detailed recommendations assessed. This chapter summarizes the operational opportunities and execution profile for this workstream.

Classification	Count	Operational Meaning
Innovate	1	Govern future-state product opportunities.

Priority operating principle

Sequence immediate optimization and standardization before treating every workflow issue as a net-new product requirement. Preserve roadmap and integration dependencies as explicit governed workstreams.

Inbound Calls

PRN Current State	•Answers ALL calls received in clinic (exception is those select brand/locations supported by HUB/ CC/AI WA)
Desired Future State	•PSR takes existing patient calls, AI/HUB escalations & referring physician calls (significant call volume shift to AI/HUB; allows PSR to provide best in class customer service in clinic)Goal is to remove the phone so front- facing reception is never distracted. AI will eventually replace IVR (all calls not just patient scheduling)
Raintree Recommendation	Explore potential integration with 8x8 via APIs - Gateways™
Dependencies / Decisions	Coordinate with 8x8/Confido and validate available Gateways/API integration requirements.

Execution profile: Available / Existing • Medium effort • 91-120 Days / Next Horizon

Detailed assessment reference: ENT-001

38 current recommendation items. Validate the customer-facing language and supporting evidence before final delivery. Front Office & Patient Access: Operating Actions

Recommended governance cadence: validate the highest-priority recommendations, assign PRN and Raintree owners, confirm capability status, sequence dependencies, and track measurable adoption/outcome indicators through the 0-120 day plan.

02 Patient Access & Front Office Excellence

37 detailed recommendations assessed. This chapter summarizes the operational opportunities and execution profile for this workstream.

Classification	Count	Operational Meaning
Innovate	2	Govern future-state product opportunities.
Integrate	2	Connect systems and data flows.
Configure & Standardize	4	Reduce variation and establish enterprise standards.
Activate & Optimize	29	Use more of what is already available.

Priority operating principle

Sequence immediate optimization and standardization before treating every workflow issue as a net-new product requirement. Preserve roadmap and integration dependencies as explicit governed workstreams.

Document Routing/ Faxes

PRN Current State	•Handles all document routing, including POC tasking & patient referrals (exception: AZ, NV, S&S & WA)
Desired Future State	•Vendor/AI works all faxes with minimal if any intervention from the PSR
Raintree Recommendation	Continue the current Confido integration for fax/document routing while Raintree roadmap capabilities are validated. Confirm the target-state ownership and reconciliation workflow before finalizing the recommendation.
Dependencies / Decisions	RT NA- Fax breakdown by type and reconciliation for all docs received and worked daily, provided by AI vendor (Confido)

Execution profile: Available / Existing • Medium effort • 91-120 Days / Next Horizon

Detailed assessment reference: FO-002

Referral Entry/ Intake

PRN Current State	PSRs convert referrals to Intake in preparation of outbound scheduling (exception: AZ, NV, S&S, TX & WA have assistance from the HUB and/or vendor)
Desired Future State	All new referrals will be received, processed & prioritized AI Agents
Raintree Recommendation	Optimize the Journey Dashboard and referral-intake workflow with the Raintree DI team so referrals processed through Confido flow into Journeys with complete lead tracking. Validate any remaining configuration changes with the appropriate Raintree SMEs.
Dependencies / Decisions	NA

Execution profile: Validate During Execution • Medium–High effort • 31–90 Days

Detailed assessment reference: FO-003

Patient Scheduling

PRN Current State	Scheduling patients’ initial evaluations and recurring appointments (exception: AZ Tier1, CA Mem Care, NV New Pts, TX Tier 1, WA New PTs)
Desired Future State	All New Patient scheduling handled by AI Agents & the centralized HUB (speciality LOBs)
Raintree Recommendation	Use existing reminder and scheduling workflows to reduce incomplete paperwork and missed appointments. Validate future-state options for regional bulk reminders, self-scheduling, and AI-supported missed-appointment follow-up as SchedulerIQ/Touchpoints capabilities are confirmed.
Dependencies / Decisions	RT- it would be nice to have RT User Report in the FO Dashboard: Roll Up by FTE and/or AI (Drill down by region/ location & appt type)

Execution profile: Available / Existing • Medium effort • 91–120 Days / Next Horizon

Detailed assessment reference: FO-004

Managing POCs/Referral Source Comm/ No Show & Cancellations/ Verification Tasks

PRN Current State	Managing plans of care (POC) remains a major manual burden, with exceptions and tasking rules needing fine tuning to reduce unnecessary workload. Currently, PSRs must manually complete POC tasks, including resending for physician signatures, even when not required by payer or state rules.
Desired Future State	•Patients scheduled out based on Plan of Care during eval check-out
Raintree Recommendation	Review and optimize POC exemption configuration so signature/return tasks are created only when required by payer, state, or workflow rules. Use the POC exemption setup reviewed by Raintree to reduce unnecessary tasking while preserving Medicare and other regulatory requirements.
Dependencies / Decisions	NA

Execution profile: Available / Existing • Low–Medium effort • 0–30 Days

Detailed assessment reference: FO-005

New Patient Appointment Reminders

PRN Current State	•If time permits PSR calls patient to confirm arrival time, share any missing data points and expectations for visit
Desired Future State	AI agent contact - The AI agent (Confido) will contact the new patient 24 hours prior to their appointment In addition to Raintree text reminders - This would complement the existing Raintree text reminder that goes out for all appointments, including evaluations. The key improvement being sought is automating the personalized pre-appointment confirmation call through AI so PSRs aren't manually making these calls when time permits.
Raintree Recommendation	Already have texting in place
Dependencies / Decisions	NA

Execution profile: Available / Existing • Medium-High effort • 31-90 Days

Detailed assessment reference: FO-006

Greeting Patients

PRN Current State	Eliminating the burdensome tasks with the use of AI ensures every patient is warmly welcomed. This frees up PSRs to focus on patient engagement
Desired Future State	The core idea is that by using AI to handle administrative burdens, PSRs can dedicate their time to warm patient welcomes and meaningful engagement rather than being distracted by phone calls and paperwork.
Raintree Recommendation	NA
Dependencies / Decisions	NA

Execution profile: Validate During Execution • Low–Medium effort • 0–30 Days

Detailed assessment reference: FO-007

Patient Registration/ 1st Visit

PRN Current State	Patients can't upload medications. Patients can't upload insurance cards If the patient is Spanish speaking, the team has to send a Spanish form set separately.
Desired Future State	Ensure patients have a clear understanding of their benefits and patient responsibility
Raintree Recommendation	Patient forms can include a Spanish translation, provided the Spanish text is built into the same form as the English version. By setting it up this way, you avoid the need to send separate form sets to your patients. Patient Portal currently has the ability for patients to upload an insurance card, however, patients are not given the capability to type in information. Medication: patients do have the capability to upload/add medication within adult medical history.
Dependencies / Decisions	Review current patient forms, review patient portal setup, review medical history options.

Execution profile: Available / Existing • Low–Medium effort • 0–30 Days

Detailed assessment reference: FO-008

Authorizations

PRN Current State	Obtains authorizations/ RX
Desired Future State	Potential hybrid solution using AI Agents/ regional centralized SMEs
Raintree Recommendation	Agentic AI/RCM
Dependencies / Decisions	Real time view of rejections/ denials related to FO workflows. Effort to eliminate and or reduce denied DOS

Execution profile:
Validate During Execution
•
Low-Medium effort
•
0-30 Days

Detailed assessment reference:
FO-009

Patient Collections

PRN Current State	•Collects patients’ estimated cost-share @ time of service and PSR collects on patient aging.
Desired Future State	Potential use of centralized collectors for post discharge patient collections (AI Agents in process and increase technology (QR Code, Wallet)
Raintree Recommendation	Coordinate Front Office and RCM workflow design for kiosk/payment deferrals so staff can identify when a patient elects to pay at the front desk and avoid assuming payment was completed. Final configuration should be validated with the RCM team.
Dependencies / Decisions	NA

Execution profile: Validate During Execution • Low-Medium effort • 0-30 Days

Detailed assessment reference: FO-010

Schedule Management

PRN Current State	•Partners with CD to manage case load to ensure full schedules and patient retention
Desired Future State	•Same as current (Pro-active management will relieve stress on CD/clinicians and enhance quality of schedule) •Use AI for reactivation; Currently PSR refers to Caseloads for follow up w. patient; key to success is clinician completing notes
Raintree Recommendation	Currently there are no tasks that are sent to the PSR group when a patient drops. You can create a stage in Active Patient Journeys to track these patients and create a stage to send a message to the patient that they have fallen off the schedule and need to reach back out to get back on the books. You are also able to use the audience report to get the data you are looking for to catch the patients sooner.
Dependencies / Decisions	NA

Execution profile: Available / Existing • Low–Medium effort • 0–30 Days

Detailed assessment reference: FO-011

Welcome Letter Automation (HIPAA)

PRN Current State	Manual sending of the welcome letter remains due to HIPAA consent issues following recent regulatory changes, blocking full automation
Desired Future State	Patients to be opted into messages
Raintree Recommendation	Automate Welcome Letter & appropriate document attachments (Ticket in process to Update HIPAA Communication preferences SF Case: 447968)
Dependencies / Decisions	Client must review with the Healthcare Exemption with their legal/compliance team

Execution profile: Validate During Execution • Low–Medium effort • 0–30 Days

Detailed assessment reference: FO-012

Review Patient Portal Tab

PRN Current State	Review Patient Portal Tab (from 1/1/26-9/20/26 - 10924) outstanding items not reviewed.
Desired Future State	Review Tab to review patients request to update demos/contact information
Raintree Recommendation	Review Patient Portal Tab daily. Update patient data or remove updates.
Dependencies / Decisions	NA

Execution profile: Validate During Execution • Low–Medium effort • 0–30 Days

Detailed assessment reference: FO-013

Scheduler Views

PRN Current State	No additional detail documented in the source analysis.
Desired Future State	No additional detail documented in the source analysis.
Raintree Recommendation	No additional detail documented in the source analysis.
Dependencies / Decisions	Confirm through joint PRN + Raintree governance.

Execution profile: Validate During Execution • Low–Medium effort • 0–30 Days

Detailed assessment reference: FO-014

FO-015 | ACTIVATE & OPTIMIZE | 0–30 DAYS

KPI

PRN Current State No additional detail documented in the source analysis.

Desired Future State No additional detail documented in the source analysis.

Raintree Recommendation No additional detail documented in the source analysis.

Dependencies / Decisions Confirm through joint PRN + Raintree governance.

Execution profile: Validate During Execution • Low–Medium effort • 0–30 Days

Detailed assessment reference: FO-015

Touchpoints - Patient Forms

PRN Current State No additional detail documented in the source analysis.

Desired Future State No additional detail documented in the source analysis.

Raintree Recommendation No additional detail documented in the source analysis.

Dependencies / Decisions Confirm through joint PRN + Raintree governance.

Execution profile: Validate During Execution • Low–Medium effort • 0–30 Days

Detailed assessment reference: FO-016

FO-017 | ACTIVATE & OPTIMIZE | 0–30 DAYS

Touchpoints - Kiosk (Medical History)

PRN Current State No additional detail documented in the source analysis.

Desired Future State No additional detail documented in the source analysis.

Raintree Recommendation No additional detail documented in the source analysis.

Dependencies / Decisions Confirm through joint PRN + Raintree governance.

Execution profile: Validate During Execution • Low–Medium effort • 0–30 Days

Detailed assessment reference: FO-017

FO-018 | ACTIVATE & OPTIMIZE | 0–30 DAYS

Touchpoints - RTPay

PRN Current State	No additional detail documented in the source analysis.
Desired Future State	No additional detail documented in the source analysis.
Raintree Recommendation	No additional detail documented in the source analysis.
Dependencies / Decisions	Confirm through joint PRN + Raintree governance.

Execution profile: Validate During Execution • Low–Medium effort • 0–30 Days

Detailed assessment reference: FO-018

Report Scheduler

PRN Current State	No additional detail documented in the source analysis.
Desired Future State	No additional detail documented in the source analysis.
Raintree Recommendation	No additional detail documented in the source analysis.
Dependencies / Decisions	Confirm through joint PRN + Raintree governance.

Execution profile: Validate During Execution • Low–Medium effort • 0–30 Days

Detailed assessment reference: FO-019

Knowledge - Scheduler Search

PRN Current State No additional detail documented in the source analysis.

Desired Future State No additional detail documented in the source analysis.

Raintree Recommendation No additional detail documented in the source analysis.

Dependencies / Decisions Confirm through joint PRN + Raintree governance.

Execution profile: Validate During Execution • Low–Medium effort • 0–30 Days

Detailed assessment reference: FO-020

FO-021 | ACTIVATE & OPTIMIZE | 0–30 DAYS

Knowledge - Block Booking - Schedule

PRN Current State	No additional detail documented in the source analysis.
Desired Future State	No additional detail documented in the source analysis.
Raintree Recommendation	No additional detail documented in the source analysis.
Dependencies / Decisions	Confirm through joint PRN + Raintree governance.

Execution profile: Validate During Execution • Low–Medium effort • 0–30 Days

Detailed assessment reference: FO-021

FO-022 | ACTIVATE & OPTIMIZE | 0–30 DAYS

Knowledge - Block Book - Delete/Reschedule

PRN Current State No additional detail documented in the source analysis.

Desired Future State No additional detail documented in the source analysis.

Raintree Recommendation No additional detail documented in the source analysis.

Dependencies / Decisions Confirm through joint PRN + Raintree governance.

Execution profile: Validate During Execution • Low–Medium effort • 0–30 Days

Detailed assessment reference: FO-022

Knowledge - Default Scheduler View

PRN Current State No additional detail documented in the source analysis.

Desired Future State No additional detail documented in the source analysis.

Raintree Recommendation No additional detail documented in the source analysis.

Dependencies / Decisions Confirm through joint PRN + Raintree governance.

Execution profile: Validate During Execution • Low–Medium effort • 0–30 Days

Detailed assessment reference: FO-023

Knowledge - Work Schedule Templates - On Boarding Providers

PRN Current State No additional detail documented in the source analysis.

Desired Future State No additional detail documented in the source analysis.

Raintree Recommendation No additional detail documented in the source analysis.

Dependencies / Decisions Confirm through joint PRN + Raintree governance.

Execution profile: Validate During Execution • Low–Medium effort • 0–30 Days

Detailed assessment reference: FO-024

Knowledge - Appointment (Color Legend)

PRN Current State	No additional detail documented in the source analysis.
Desired Future State	No additional detail documented in the source analysis.
Raintree Recommendation	No additional detail documented in the source analysis.
Dependencies / Decisions	Confirm through joint PRN + Raintree governance.

Execution profile: Validate During Execution • Low–Medium effort • 0–30 Days

Detailed assessment reference: FO-025

Knowledge - Appointment Recapture

PRN Current State	No additional detail documented in the source analysis.
Desired Future State	No additional detail documented in the source analysis.
Raintree Recommendation	No additional detail documented in the source analysis.
Dependencies / Decisions	Confirm through joint PRN + Raintree governance.

Execution profile: Validate During Execution • Low–Medium effort • 0–30 Days

Detailed assessment reference: FO-026

FO-027 | ACTIVATE & OPTIMIZE | 0–30 DAYS

RT Web - Scheduler

PRN Current State No additional detail documented in the source analysis.

Desired Future State No additional detail documented in the source analysis.

Raintree Recommendation No additional detail documented in the source analysis.

Dependencies / Decisions Confirm through joint PRN + Raintree governance.

Execution profile: Validate During Execution • Low–Medium effort • 0–30 Days

Detailed assessment reference: FO-027

Dashboard - RTConnect (Unread Notes/Messages)

PRN Current State No additional detail documented in the source analysis.

Desired Future State No additional detail documented in the source analysis.

Raintree Recommendation No additional detail documented in the source analysis.

Dependencies / Decisions Confirm through joint PRN + Raintree governance.

Execution profile: Validate During Execution • Low–Medium effort • 0–30 Days

Detailed assessment reference: FO-028

FO-029 | ACTIVATE & OPTIMIZE | 0–30 DAYS

First Come First Serve Waitlist

PRN Current State No additional detail documented in the source analysis.

Desired Future State No additional detail documented in the source analysis.

Raintree Recommendation No additional detail documented in the source analysis.

Dependencies / Decisions Confirm through joint PRN + Raintree governance.

Execution profile: Validate During Execution • Low–Medium effort • 0–30 Days

Detailed assessment reference: FO-029

Waitlist Clean up

PRN Current State No additional detail documented in the source analysis.

Desired Future State No additional detail documented in the source analysis.

Raintree Recommendation No additional detail documented in the source analysis.

Dependencies / Decisions Confirm through joint PRN + Raintree governance.

Execution profile: Validate During Execution • Low–Medium effort • 0–30 Days

Detailed assessment reference: FO-030

FO-031 | ACTIVATE & OPTIMIZE | 0–30 DAYS

Location Resources

PRN Current State No additional detail documented in the source analysis.

Desired Future State No additional detail documented in the source analysis.

Raintree Recommendation No additional detail documented in the source analysis.

Dependencies / Decisions Confirm through joint PRN + Raintree governance.

Execution profile: Validate During Execution • Low–Medium effort • 0–30 Days

Detailed assessment reference: FO-031

FO-032 | ACTIVATE & OPTIMIZE | 0–30 DAYS

Team Scheduler/View

PRN Current State No additional detail documented in the source analysis.

Desired Future State No additional detail documented in the source analysis.

Raintree Recommendation No additional detail documented in the source analysis.

Dependencies / Decisions Confirm through joint PRN + Raintree governance.

Execution profile: Validate During Execution • Low–Medium effort • 0–30 Days

Detailed assessment reference: FO-032

FO-033 | ACTIVATE & OPTIMIZE | 0–30 DAYS

NPS Survey - High score - Review

PRN Current State No additional detail documented in the source analysis.

Desired Future State No additional detail documented in the source analysis.

Raintree Recommendation No additional detail documented in the source analysis.

Dependencies / Decisions Confirm through joint PRN + Raintree governance.

Execution profile: Validate During Execution • Low–Medium effort • 0–30 Days

Detailed assessment reference: FO-033

FO-034 | ACTIVATE & OPTIMIZE | 0–30 DAYS

Journey - Follow up actions

PRN Current State	No additional detail documented in the source analysis.
Desired Future State	No additional detail documented in the source analysis.
Raintree Recommendation	No additional detail documented in the source analysis.
Dependencies / Decisions	Confirm through joint PRN + Raintree governance.

Execution profile: Validate During Execution • Low–Medium effort • 0–30 Days

Detailed assessment reference: FO-034

Lead Journey - Email or Cell Requirement

PRN Current State	No additional detail documented in the source analysis.
Desired Future State	No additional detail documented in the source analysis.
Raintree Recommendation	No additional detail documented in the source analysis.
Dependencies / Decisions	Confirm through joint PRN + Raintree governance.

Execution profile: Validate During Execution • Low–Medium effort • 0–30 Days

Detailed assessment reference: FO-035

Lead Journey - Duplicate Records Handling

PRN Current State	No additional detail documented in the source analysis.
Desired Future State	No additional detail documented in the source analysis.
Raintree Recommendation	No additional detail documented in the source analysis.
Dependencies / Decisions	Confirm through joint PRN + Raintree governance.

Execution profile: Validate During Execution • Low–Medium effort • 0–30 Days

Detailed assessment reference: FO-036

Dropped Patients - Handling

PRN Current State No additional detail documented in the source analysis.

Desired Future State No additional detail documented in the source analysis.

Raintree Recommendation No additional detail documented in the source analysis.

Dependencies / Decisions Confirm through joint PRN + Raintree governance.

Execution profile: Validate During Execution • Low–Medium effort • 0–30 Days

Detailed assessment reference: FO-037

Healthcare Exemption

PRN Current State	No additional detail documented in the source analysis.
Desired Future State	No additional detail documented in the source analysis.
Raintree Recommendation	No additional detail documented in the source analysis.
Dependencies / Decisions	Confirm through joint PRN + Raintree governance.

Execution profile: Validate During Execution • Low–Medium effort • 0–30 Days

Detailed assessment reference: FO-038

Patient Access & Front Office Excellence: Operating Actions

Recommended governance cadence: validate the highest-priority recommendations, assign PRN and Raintree owners, confirm capability status, sequence dependencies, and track measurable adoption/outcome indicators through the 0–120 day plan.

03

9 pre-built items from the Internal Master.

Validate the customer-facing language and supporting evidence before final delivery.

Sales, Marketing & Patient Engagement

1 detailed recommendations assessed. This chapter summarizes the operational opportunities and execution profile for this workstream.

Classification	Count	Operational Meaning
Enable & Adopt	1	Strengthen workflow, training and adoption.

Priority operating principle

Sequence immediate optimization and standardization before treating every workflow issue as a net-new product requirement. Preserve roadmap and integration dependencies as explicit governed workstreams.

Journeys

PRN Current State	PRN has experienced limitations in lead/referral reporting, including regional visibility and the ability to review referral activity as a whole.
Desired Future State	Provide reliable lead-to-patient conversion visibility by region/location category with the data needed to manage referral performance.
Raintree Recommendation	The new lead to patient conversion report in BI allows users to look at all leads by lead creation date and can be view by Location category/Region.
Dependencies / Decisions	Use the delivered BI Lead to Patient Conversion report and confirm PRN access and adoption.

Execution profile: Validate During Execution • Low–Medium effort • 0–30 Days

Detailed assessment reference: ENT-001

9 pre-built items from the Internal Master. Validate the customer-facing language and supporting evidence before final delivery. Sales, Marketing & Patient Engagement: Operating Actions

Recommended governance cadence: validate the highest-priority recommendations, assign PRN and Raintree owners, confirm capability status, sequence dependencies, and track measurable adoption/outcome indicators through the 0–120 day plan.

04 Growth, Referral & Patient Journey

8 detailed recommendations assessed. This chapter summarizes the operational opportunities and execution profile for this workstream.

Classification	Count	Operational Meaning
Configure & Standardize	5	Reduce variation and establish enterprise standards.
Activate & Optimize	2	Use more of what is already available.
Integrate	1	Connect systems and data flows.

Priority operating principle

Sequence immediate optimization and standardization before treating every workflow issue as a net-new product requirement. Preserve roadmap and integration dependencies as explicit governed workstreams.

Non started records by region

PRN Current State	PRN was using reports that did not provide the complete regional and conversion view needed for operational analysis.
Desired Future State	Use evaluation-scheduled logic and regional/location-category filtering to measure true lead-to-patient conversion.
Raintree Recommendation	Adopt the Lead to Patient Conversion report delivered on 8/31 and validate that PRN users have access through the Connect dashboard.
Dependencies / Decisions	BI report lives in Connect dashboard, lead to patient conversion, report, PRN not aware that they had access to this; PRN team did not realize they needed to ask Matt for this access . the standard report shows the date they were converted to a patient, but the true conversion is them actually coming in sched as a patient, so Indhu is working on a report of when the evaluation was actually scheduled (this change will also eventually come w/ standard report) indhu is hoping to have this report for PRN done by 8/17 - 8/18 -- this report will show if a pt who was scheduled ACTUALLY attending their evaluation Indhu: Lead to Patient conversion based on eval schedule was delivered to PRN on 8/31.

Execution profile: Available / Existing • Low–Medium effort • 0–30 Days

Detailed assessment reference: GR-002

BI Reporting Questions/Availability

PRN Current State	PRN is not fully aware of the BI reports available and has open questions about metric definitions, including rescheduled-patient counting.
Desired Future State	Establish a consistent reporting catalog and shared metric definitions for PRN users.
Raintree Recommendation	Review the available BI reporting catalog with PRN and document the agreed definitions for rescheduled patients and other key measures.
Dependencies / Decisions	PRN unsure of all the BI reports available to them

Execution profile: Validate During Execution • Low–Medium effort • 0–30 Days

Detailed assessment reference: GR-003

NPS

PRN Current State	PRN wants stronger provider awareness and follow-up when a low NPS score is received.
Desired Future State	Create a reliable, low-friction process to surface detractor feedback to the appropriate provider/leader.
Raintree Recommendation	Use configurable email/reporting options for low NPS scores and avoid creating unnecessary open tasks. Validate the preferred notification and escalation workflow with PRN operations.
Dependencies / Decisions	Indhu is saying we could set it up so an email goes to the provider to let them know hey you got this, in the email the provider will see this feedback this is something PRN ops will review internally to determine why they dont have this setting on and if they want to turn it on. Question from PRN - can they customize the message that would go out to the provider for this? Also asking if they do the task, is there a way to ensure the task then is closed once the provider views the email? or someone to not have to rely on having the provider go in and close the task? -- they dont want this to create an open task-- Indhu suggesting skip the task option and have a report go out on a weekly basis to let them know these are all the low scores that were received that are low, let the RDO speak to the teams

Execution profile: Available / Existing • Low–Medium effort • 0–30 Days

Detailed assessment reference: GR-004

Email Outreach

PRN Current State	PRN needs additional clarity on email outreach capabilities, campaign setup, and available engagement metrics.
Desired Future State	Enable PRN to use the appropriate campaign workflow with visibility into email performance.
Raintree Recommendation	Conduct the requested email-outreach working session and determine whether the target use cases should be supported in Raintree/ARM, custom services, or an external platform such as HubSpot.
Dependencies / Decisions	PRN wants a working session specific to email set up options and tracking/metrics they can see on this - ACTION ITEM

Execution profile: Validate During Execution • Low–Medium effort • 0–30 Days

Detailed assessment reference: GR-005

Patient Consent & Campaigns

PRN Current State	PRN is using a form to capture patient preferences for electronic statements and communications while adapting to healthcare-exemption consent changes.
Desired Future State	Maintain compliant patient consent while supporting scalable digital campaigns and communications.
Raintree Recommendation	Validate PRN communication-preference configuration and campaign eligibility rules against the healthcare-exemption workflow before expanding campaigns.
Dependencies / Decisions	PRN legal/compliance review and final Raintree configuration validation.

Execution profile: Validate During Execution • Low-Medium effort • 0-30 Days

Detailed assessment reference: GR-006

Lead to Patient Conversion report

PRN Current State	PRN needed clearer lead-conversion logic and regional reporting than the prior workflow provided.
Desired Future State	Use the delivered Lead to Patient Conversion report as the standard view for conversion performance.
Raintree Recommendation	Use the 8/31 Lead to Patient Conversion report with evaluation-scheduled logic, Location Category, Financial Class, kept appointments, cancellations, and no-shows. Confirm user access with Matt N.
Dependencies / Decisions	PRN user access and adoption of the delivered report.

Execution profile: Validate During Execution • Low-Medium effort • 0-30 Days

Detailed assessment reference: GR-007

Custom Report - Delivered

PRN Current State	PRN requested additional fields and conversion metrics in the custom lead-to-patient report.
Desired Future State	Provide a single report with the regional, financial-class, kept-appointment, cancellation, and no-show detail PRN needs.
Raintree Recommendation	Treat the 8/31 delivered Lead to Patient Conversion report as the completed output and confirm PRN access and acceptance.
Dependencies / Decisions	action item - Indhu to add columns to the report

Execution profile: Validate During Execution • Low–Medium effort • 0–30 Days

Detailed assessment reference: GR-008

Salesforce - Currently doing a Manual Upload- Interested in API Connection

PRN Current State	PRN currently performs a manual Salesforce upload and has expressed interest in an API-based connection.
Desired Future State	Reduce manual Salesforce data movement through an API-based integration where the required endpoints support PRN use cases.
Raintree Recommendation	After PRN confirms the required data set, use the Gateways process to evaluate the Salesforce integration and connect the appropriate PRN consultant/developer resources under the required Gateways terms.
Dependencies / Decisions	PRN decision on required data elements, consultant/developer participation, Gateways terms, and confirmation that the standard APIs meet the use case.

Execution profile: Available / Existing • Medium–High effort • 31–90 Days

Detailed assessment reference: GR-009

Growth, Referral & Patient Journey: Operating Actions

Recommended governance cadence: validate the highest-priority recommendations, assign PRN and Raintree owners, confirm capability status, sequence dependencies, and track measurable adoption/outcome indicators through the 0–120 day plan.

05 Clinical Experience & Provider Productivity

39 detailed recommendations assessed. This chapter summarizes the operational opportunities and execution profile for this workstream.

Classification	Count	Operational Meaning
Integrate	3	Connect systems and data flows.
Configure & Standardize	30	Reduce variation and establish enterprise standards.
Activate & Optimize	4	Use more of what is already available.
Innovate	2	Govern future-state product opportunities.

Priority operating principle

Sequence immediate optimization and standardization before treating every workflow issue as a net-new product requirement. Preserve roadmap and integration dependencies as explicit governed workstreams.

Caseload Management

PRN Current State	Caseload view is slow to load, contains outdated information, and is not consistently used by providers
Desired Future State	Improve provider caseload visibility and management
Raintree Recommendation	Review caseload configuration. DASH plugin > DASH_SETUP #34 change to Y. This will hide non-started patients in Case Load. DASH plugin > DASH_SETUP #28. Review this option. Consider a change to Progress or Plan as the default view instead of Full. This might improve load times as it is loading less data. LIB_CASE plug > LIB_CASE_SETUP #1 change “Close roles?” to ‘S’. This will silently close role records instead of forcing therapists to click ‘Yes’ or ‘No’ when discharging a patient, to close the role and remove the patient from their case load. Coach therapists / front office staff to perform a one-time major clean up of their case load tabs. With higher security this can be done at a location level. Select patients who no longer apply (due to pre-existing configuration) and have them select the “Remove from Active Caseload” button. Sort by Next Visit and then Last Visit columns to help identify patients that are no longer applicable to keep.
Dependencies / Decisions	Performance with 3,000+ users; existing dashboard configuration
Execution profile: Available / Existing • Medium–High effort • 31–90 Days	
Detailed assessment reference: CL-001	

KPI Visibility

PRN Current State	Providers are not consistently using clinical KPIs within Raintree
Desired Future State	Surface actionable provider-level KPIs
Raintree Recommendation	Review and enable appropriate KPI measures, including patients without future visits and patients with limited visits remaining. KPI Plugin > KPI_SETUP #1 switch to 'Y' #2 Exclude specific usergroups / users as needed #3 Assign Provider KPIs to specific usergroups Use the "Provider Measures" category and turn on the appropriate KPIs. Recommend 101 and 111 to start Turn them on by opening up each option and placing a 'Y' in the first value. Then identify threshold values.
Dependencies / Decisions	KPI setup and provider adoption
Execution profile: Validate During Execution • Low-Medium effort • 0-30 Days	
Detailed assessment reference: CL-002	

Tab / Session Performance

PRN Current State	PRN limits users to approximately five open tabs because of perceived performance issues; users launch an additional Raintree session when more tabs are needed
Desired Future State	Allow clinicians to efficiently work across multiple patients
Raintree Recommendation	Review performance limitations, browser/session behavior, and recommended workflow
Dependencies / Decisions	Scale of 3,000+ users; Web vs. Classic differences

Execution profile: Validate During Execution • Low-Medium effort • 0-30 Days

Detailed assessment reference: CL-003

Multi-Clinic Navigation

PRN Current State	Switching between clinics is difficult, particularly in RTWeb
Desired Future State	Improve navigation between clinics/facilities
Raintree Recommendation	Review RTWeb facility navigation and recommended configuration/workflow Review security rights for multi-clinic provider/admin staff. Consider giving them access to the Clinic View tab on the Dashboard so they can see all appointments across different locations. DASH_CLVIEW = E Coach users on how to leverage location filters on the Dashboard tab (or to leave them blank to see all information combined).
Dependencies / Decisions	Provider vs. administrator workflows may differ

Execution profile: Validate During Execution • Low-Medium effort • 0-30 Days

Detailed assessment reference: CL-004

CL-005 | CONFIGURE & STANDARDIZE | 0-30 DAYS

Appointment Check-In Visibility

PRN Current State	Appointment check-in notification functionality is a pain point, particularly for Spine & Sport
Desired Future State	Improve clinician awareness when patients arrive
Raintree Recommendation	WAKECLIENT = E can be set for RTClient users. This will enable a pop-up screen when patients are checked in. This does not function in RTWeb.
Dependencies / Decisions	May vary by clinic workflow / RTWeb configuration

Execution profile: Validate During Execution • Low-Medium effort • 0-30 Days

Detailed assessment reference: CL-005

Provider Capacity Reporting

PRN Current State	Providers are not using Raintree capacity reporting; capacity is currently managed manually
Desired Future State	Give clinicians and leaders visibility into true provider capacity
Raintree Recommendation	Validate capacity reporting configuration against PRN scheduling model Review Work Schedule Utilization Report Review Goals by Provider/Location Report and Budget Dashboard setup
Dependencies / Decisions	PRN scheduling structure may overstate apparent availability

Execution profile: Available / Existing • Low–Medium effort • 0–30 Days

Detailed assessment reference: CL-006

CL-007 | CONFIGURE & STANDARDIZE | 0-30 DAYS

Daily Provider Capacity

PRN Current State PRN's operating target is 12 patients per day, but capacity management is manual

Desired Future State Support target of approximately 12 patients per provider per day

Raintree Recommendation Configure/report provider daily capacity and utilization

Dependencies / Decisions Scheduling templates and provider-specific expectations

Execution profile: Validate During Execution • Low-Medium effort • 0-30 Days

Detailed assessment reference: CL-007

CL-008 | CONFIGURE & STANDARDIZE | 0-30 DAYS

Regional Capacity / Cancellation Reporting

PRN Current State FP&A is currently used to assess capacity and cancellation rates outside of the clinical workflow

Desired Future State Improve regional operational visibility

Raintree Recommendation Evaluate Raintree reporting or AnalyticsIQ options for regional rollups

Dependencies / Decisions Organizational hierarchy and region configuration

Execution profile: Available / Existing • Low–Medium effort • 0–30 Days

Detailed assessment reference: CL-008

Patient Medical History

PRN Current State	PMH is frequently completed on paper; Kiosk is not consistently used; forms are scanned into the chart
Desired Future State	Eliminate paper-based medical history collection
Raintree Recommendation	Review Kiosk, Portal, digital form configuration, and mapping into clinical documentation Raintree’s Medical History record cannot be customized. If Raintree’s Medical History is utilized on the patient portal/kiosk, information will flow into clinical documentation seamlessly and eliminate manual documentation time for providers.
Dependencies / Decisions	Current PRN custom forms; portal upload errors

Execution profile: Available / Existing • Low–Medium effort • 0–30 Days

Detailed assessment reference: CL-009

Medical History Documentation

PRN Current State	Clinicians frequently capture medical history manually in the subjective section or through ScribeIQ because structured PMH is unavailable
Desired Future State	Reduce manual clinician documentation during evaluations
Raintree Recommendation	Map patient-entered PMH into the clinical record and Scribe/evaluation workflow “Sync History data” button will pull over Subjective Tab: Mechanism of Onset Current Surgery Data Current Surgery Details Pain rating scores Work Status DOI Tracking Tab: Next MD Visit
Dependencies / Decisions	Requires digital intake adoption and field mapping

Execution profile: Available / Existing • Low–Medium effort • 0–30 Days

Detailed assessment reference: CL-010

CL-011 | INTEGRATE | 31–90 DAYS

PROMIS Integration

PRN Current State	PRN has a three-year Limber SOW; PROMIS data is expected to flow into the note but current workflow requires manual effort
Desired Future State	Bring PROMIS results directly into clinical documentation
Raintree Recommendation	Validate current Limber integration capabilities and upcoming functionality
Dependencies / Decisions	Limber integration / SOW / release timing

Execution profile: Available / Existing • Medium–High effort • 31–90 Days

Detailed assessment reference: CL-011

CL-012 | INTEGRATE | 31–90 DAYS

Legacy Questionnaires

PRN Current State Legacy questionnaires are still being completed manually in Washington

Desired Future State Eliminate manual legacy questionnaire workflows

Raintree Recommendation Review migration of legacy questionnaires to Kiosk/Portal/Limber workflows

Dependencies / Decisions Regional requirements and payer-specific forms

Execution profile: Validate During Execution • Medium–High effort • 31–90 Days

Detailed assessment reference: CL-012

Evaluation Workflow

PRN Current State	Providers load evaluation templates before launching ScribeIQ, but use is inconsistent
Desired Future State	Standardize and optimize evaluation workflow before broad ScribeIQ use
Raintree Recommendation	Define recommended evaluation template configuration and sequence prior to ScribeIQ launch ScribeIQ will overwrite into Raintree fields. What is being templated that Scribe cannot accomplish? Most clients stop use of TVIST templates once optimizing ScribeIQ templates. Refine ScribeIQ prompting templates to capture information that is typically baked into standard Raintree templates.
Dependencies / Decisions	Template cleanup and provider adoption

Execution profile: Validate During Execution • Low-Medium effort • 0-30 Days

Detailed assessment reference: CL-013

Template Governance

PRN Current State PRN primarily uses company-wide templates; Jeff wants flexibility for provider- or practice-level templates

Desired Future State Establish appropriate enterprise and local template governance

Raintree Recommendation Define governance model for enterprise, regional, clinic, and provider templates
GLOBALTEMPL = E is the security right needed for the ability to modify and save a global TVIST note template. Recommend creating a naming convention to help clinics / regions create specific templates as the table containing all templates is shared across the database. Individual providers do have the ability to create note templates for themselves. Individual providers should leverage individual abilities such as abbreviations, picklist templates, and favorites lists within picklists. This eliminates the master templates table becoming too cluttered.

Dependencies / Decisions Compliance, maintenance, and standardization

Execution profile: Validate During Execution • Low-Medium effort • 0-30 Days

Detailed assessment reference: CL-014

Template Utilization

PRN Current State	PRN has not completed a significant cleanup of clinical templates in years
Desired Future State	Identify unused or redundant clinical templates
Raintree Recommendation	Review template utilization data and establish recurring governance process Tables > More > Custom Tables - delete / deactivate templates that are not being utilized. Note: any template with a Filter on it can only be seen and loaded by that specific user, when in a TVIST note.
Dependencies / Decisions	Ability to report template usage

Execution profile: Validate During Execution • Low-Medium effort • 0-30 Days

Detailed assessment reference: CL-015

Template Administration

PRN Current State	Clinical users can filter/load templates but cannot independently edit certain templates without RCM involvement
Desired Future State	Reduce dependency on RCM for routine clinical template changes
Raintree Recommendation	Review permissions and workflow for clinical template administration GLOBALTEMPL = E gives the ability to modify/save global templates. MODIFYPCK = FAEPDV gives the ability to modify/save picklist entries at the global level.
Dependencies / Decisions	Role-based security and governance

Execution profile: Validate During Execution • Low-Medium effort • 0-30 Days

Detailed assessment reference: CL-016

Activities Workflow

PRN Current State	Activities workflow is a significant pain point and requires substantial manual configuration
Desired Future State	Simplify and optimize Activities documentation
Raintree Recommendation	Conduct detailed Activities Tab workflow/configuration review MODIFYPCK = FAEPDV will be needed to delete, edit, and add new entries to this list. Consider the creation of Activity headers (such as *Therapeutic Exercise*). The asterisk will place the option at the top of the master list. This line can be leveraged as the place to identify the total time spent performing this CPT code. Raintree can also set up a script to make any line in the Time-Based Activity Log with a CPT present, green to visually assist with the difference between billable header code vs. the individual interventions that make up the CPT code.
Dependencies / Decisions	Existing PRN templates and billing requirements
Execution profile: Available / Existing • Low–Medium effort • 0–30 Days	
Detailed assessment reference: CL-017	

Activities Selection

PRN Current State PRN is missing selection boxes on the left side of the Activities workflow

Desired Future State Improve activity selection and documentation speed

Raintree Recommendation Review configuration/version behavior for selection boxes

Dependencies / Decisions Web vs. Classic functionality

Execution profile: Available / Existing • Low–Medium effort • 0–30 Days

Detailed assessment reference: CL-018

CL-019 | CONFIGURE & STANDARDIZE | 0-30 DAYS

Clinical Widgets

PRN Current State	Current widget functionality has not been fully reviewed for clinical use
Desired Future State	Optimize provider dashboard and documentation workflow
Raintree Recommendation	Complete widget configuration and best-practice review
Dependencies / Decisions	User roles and screen configuration

Execution profile: Available / Existing • Low-Medium effort • 0-30 Days

Detailed assessment reference: CL-019

CL-020 | CONFIGURE & STANDARDIZE | 0-30 DAYS

Slow Authentication

PRN Current State	SSO authentication into RTWeb is reported as very slow
Desired Future State	Improve RTWeb login/access performance
Raintree Recommendation	Review SSO authentication flow, IdP configuration, and RTWeb performance
Dependencies / Decisions	PRN identity provider / network / SSO configuration

Execution profile: Validate During Execution • Low-Medium effort • 0-30 Days

Detailed assessment reference: CL-020

CL-021 | CONFIGURE & STANDARDIZE | 0-30 DAYS

RTWeb Adoption

PRN Current State	PRN is considering/working toward RTWeb rollout for all providers
Desired Future State	Prepare for broader RTWeb rollout
Raintree Recommendation	Complete Web vs. Classic workflow assessment and address identified gaps Differences between Web and Classic PDF can be sent
Dependencies / Decisions	Multi-clinic navigation; ScribeIQ; performance

Execution profile: Available / Existing • Low–Medium effort • 0–30 Days

Detailed assessment reference: CL-021

Split-Screen Workflow

PRN Current State	Providers use a split-screen workflow similar to the existing Chrome extension experience
Desired Future State	Preserve efficient simultaneous charting and Scribe workflow
Raintree Recommendation	Validate recommended RTWeb/ScribeIQ screen configuration ScribeIQ recent enhancements include a screen overlay widget which will allow a user to utilize ScribeIQ and RTWeb at the same time on one screen/tab. ScribeIQ also recently released the multi-patient recording tab which reduces the number of ScribeIQ tabs necessary to one.
Dependencies / Decisions	Browser behavior and screen resolution

Execution profile: Available / Existing • Low–Medium effort • 0–30 Days

Detailed assessment reference: CL-022

Diagnosis Code Ordering

PRN Current State	PRN needs validation of how diagnosis codes generated or received through ScribeIQ are ordered
Desired Future State	Ensure diagnosis codes populate in correct priority/order
Raintree Recommendation	Validate ScribeIQ and intake diagnosis-code mapping logic
Dependencies / Decisions	Intake data and coding configuration

Execution profile: Validate During Execution • Low-Medium effort • 0-30 Days

Detailed assessment reference: CL-023

ScribeIQ to Activities

PRN Current State ScribeIQ is not pushing Activities into the Activities Tab as desired

Desired Future State Reduce duplicate/manual Activities documentation

Raintree Recommendation Review current ScribeIQ Activities capabilities and roadmap

Dependencies / Decisions Structured vs. narrative Scribe output

Execution profile: Available / Existing • Medium effort • 91–120 Days / Next Horizon

Detailed assessment reference: CL-024

Activity Time Roll-Forward

PRN Current State	Activity times are rolling forward line-by-line from previous visits
Desired Future State	Reduce compliance risk from copied time
Raintree Recommendation	Review configuration to stop time roll-forward and align with documentation best practices Raintree can configure the activity log columns to not roll forward. In this example, we could disable rolling forward of the time column, if desired. This would work very well if header activities are leveraged, reducing the amount of places a clinician needs to document time.
Dependencies / Decisions	Significant workflow change for providers

Execution profile: Validate During Execution • Low-Medium effort • 0-30 Days

Detailed assessment reference: CL-025

Time Documentation Methodology

PRN Current State	Providers document time at the individual activity level instead of primarily at the CPT-code level
Desired Future State	Improve accuracy and compliance of timed-code documentation
Raintree Recommendation	Evaluate transition to CPT-level time documentation and required configuration/training See above recommendation (recommendation 17).
Dependencies / Decisions	Provider behavior and billing workflows

Execution profile: Validate During Execution • Low-Medium effort • 0-30 Days

Detailed assessment reference: CL-026

Evaluation Charge Roll-Forward

PRN Current State	Evaluation charge currently rolls into the next daily note unless configuration is changed
Desired Future State	Prevent evaluation charge from appearing on subsequent daily notes
Raintree Recommendation	Change applicable evaluation configuration/default to prevent roll-forward Raintree can configure the Time column to not roll forward on the Service-Based tab of Activity Log. Recommend setting the Evaluation line / any templates to default a specific entry within the CPT code column. For example “Evaluation - [SB]” We can then adjust a setup option to default Done Today to No for anything marked “SB”
Dependencies / Decisions	Configuration must be validated across templates

Execution profile: Available / Existing • Low–Medium effort • 0–30 Days

Detailed assessment reference: CL-027

PT / PTA Handoff

PRN Current State	PRN uses handoff functionality with Techs but not routinely between PTs and PTAs; providers manually change performing provider in Activities
Desired Future State	Improve handoff of patients between PTs and PTAs
Raintree Recommendation	Review handoff functionality, scheduling, Activities, and billing ownership Pre-Visit Planning could also be leveraged to help gain quick and easy access to the Activity Log (prior to notes), to update the Provider column.
Dependencies / Decisions	Billing attribution and payer rules

Execution profile: Available / Existing • Low–Medium effort • 0–30 Days

Detailed assessment reference: CL-028

Unplanned PTA Coverage

PRN Current State	When a PTA helps a PT due to schedule changes, staff manually adjust provider/activity information to bill correctly
Desired Future State	Handle schedule changes without manual billing corrections
Raintree Recommendation	Design standardized PT/PTA coverage workflow using handoff or configuration Re-Assign the Note in the “Assigned To” field if the note has already been started. If not, move the appointment to the new provider’s schedule.
Dependencies / Decisions	Credentialing, payer rules, billing setup

Execution profile: Validate During Execution • Low-Medium effort • 0-30 Days

Detailed assessment reference: CL-029

Progress Report Goal Updates

PRN Current State	Providers are not consistently updating goal comments/results; ScribeIQ does not automatically update the Goals section
Desired Future State	Ensure goals are updated during required progress reporting
Raintree Recommendation	Evaluate alerts, validations, required fields, and future AI-assisted goal updates
Dependencies / Decisions	Provider workflow and ScribeIQ functionality

Execution profile: Validate During Execution • Low-Medium effort • 0-30 Days

Detailed assessment reference: CL-030

CL-031 | CONFIGURE & STANDARDIZE | 0-30 DAYS

Goal Documentation for Authorization

PRN Current State	PRN reports authorization risk when progress reports do not contain updated goals
Desired Future State	Reduce authorization denials tied to incomplete goal updates
Raintree Recommendation	Build workflow alerts/validation around goal review and authorization milestones Add custom events to validate that goal status column values are updated / reviewed in specific note types.
Dependencies / Decisions	Payer-specific requirements

Execution profile: Validate During Execution • Low-Medium effort • 0-30 Days

Detailed assessment reference: CL-031

Progress Note Configuration

PRN Current State	PRN believes clinicians may be completing more progress notes than clinically or payer-required
Desired Future State	Reduce unnecessary progress-note documentation
Raintree Recommendation	Review progress note configuration, due-date logic, and TVIST settings Progress Note intervals appear to be generally set for 10/12 visits or 30 days, whichever comes first, for most payors. This can be set up more specifically for certain FC's or individual payors, such as WC (6v or 14d). In addition, Raintree will require a PN if the POC expires either in terms of visits or date range.
Dependencies / Decisions	Payer variation

Execution profile: Available / Existing • Low–Medium effort • 0–30 Days

Detailed assessment reference: CL-032

Plan of Care Configuration

PRN Current State	PRN has uncoupled POC from progress notes, but workflow still creates unnecessary documentation in some cases
Desired Future State	Optimize POC and progress-note relationship
Raintree Recommendation	Conduct POC configuration review alongside progress-note review Only POC requirements in the system are ICD-10 codes, Planned Services, Frequency/Duration, at least one active goal, and Clinical Impression. These validations exist as part of the TVIST note and do not require the clinician to document them separately. The POC is only required to be updated if the patient’s plan runs out of planned visits or if the date range expires.
Dependencies / Decisions	Regional and payer requirements

Execution profile: Roadmap / Future • Medium effort • 91–120 Days / Next Horizon

Detailed assessment reference: CL-033

Tracking Tab Adoption

PRN Current State	PRN clinicians are generally not using the Tracking Tab and were not consistently trained on it
Desired Future State	Determine whether Tracking Tab can improve clinical visibility
Raintree Recommendation	Conduct workflow demonstration and use-case review Tracking gives visibility into POC records, authorizations, prescriptions, Medicare Cap, Appointment Comments, attachments, as well as Progress Note due dates. It is recommended to use this tab as needed for visibility purposes.
Dependencies / Decisions	May require front-office process alignment

Execution profile: Validate During Execution • Low–Medium effort • 0–30 Days

Detailed assessment reference: CL-034

Provider Scheduling of POC

PRN Current State	Providers sometimes schedule their own full POC; copying/pasting appointments is time-consuming
Desired Future State	Improve efficiency when clinicians schedule future visits
Raintree Recommendation	Review scheduling tools such as Block Booking. Block booking refers to scheduling a batch of appointments in the future. For example, you can block book appointments for specific patients or with specific appointment types. No previous appointments are needed to use block booking Review front-office/provider ownership of scheduling
Dependencies / Decisions	May overlap Front Office workflow

Execution profile: Validate During Execution • Low-Medium effort • 0-30 Days

Detailed assessment reference: CL-035

CL-036 | CONFIGURE & STANDARDIZE | 0-30 DAYS

Patient-Specific Payer Forms

PRN Current State	Providers review patient-specific forms for UHC, Cigna, Humana, BCBS and others on paper and manually use information for authorization portals
Desired Future State	Eliminate paper review of payer-specific clinical forms
Raintree Recommendation	Review Kiosk/Portal/custom forms and structured capture options by payer/region
Dependencies / Decisions	Payer-specific forms and regional variation

Execution profile: Validate During Execution • Low-Medium effort • 0-30 Days

Detailed assessment reference: CL-036

Provider-to-Patient Texting

PRN Current State	Bi-directional texting is used mostly by front office; providers have limited/inconsistent access
Desired Future State	Improve direct communication between clinicians and patients
Raintree Recommendation	Review RTConnect permissions, dashboard access, and on-demand texting workflow
Dependencies / Decisions	Role-based access and message ownership

Execution profile: Validate During Execution • Low-Medium effort • 0-30 Days

Detailed assessment reference: CL-037

CL-038 | CONFIGURE & STANDARDIZE | 0-30 DAYS

RTConnect Messaging Access

PRN Current State RTConnect messaging/dashboard is not consistently available to clinicians

Desired Future State Surface patient messages within clinical workflow

Raintree Recommendation Configure provider access and notification workflow

Dependencies / Decisions May require role/security changes

Execution profile: Validate During Execution • Low-Medium effort • 0-30 Days

Detailed assessment reference: CL-038

CL-039 | ACTIVATE & OPTIMIZE | 0-30 DAYS

In-App Chat

PRN Current State	PRN does not use Chat messaging in Classic and currently relies on Teams
Desired Future State	Reduce need to leave Raintree for routine operational communication
Raintree Recommendation	Evaluate enabling internal Raintree Chat for defined use cases
Dependencies / Decisions	Teams is established enterprise communication platform

Execution profile: Available / Existing • Low–Medium effort • 0–30 Days

Detailed assessment reference: CL-039

Clinical Experience & Provider Productivity: Operating Actions

Recommended governance cadence: validate the highest-priority recommendations, assign PRN and Raintree owners, confirm capability status, sequence dependencies, and track measurable adoption/outcome indicators through the 0–120 day plan.

06 Revenue Cycle Transformation

19 detailed recommendations assessed. This chapter summarizes the operational opportunities and execution profile for this workstream.

Classification	Count	Operational Meaning
Configure & Standardize	7	Reduce variation and establish enterprise standards.
Activate & Optimize	10	Use more of what is already available.
Integrate	1	Connect systems and data flows.
Deploy	1	Operationalize active/new capabilities.

Priority operating principle

Sequence immediate optimization and standardization before treating every workflow issue as a net-new product requirement. Preserve roadmap and integration dependencies as explicit governed workstreams.

Updating Payors

PRN Current State

Shama was saying a screen was missing and requiring her to go back and add necessary info - for example the missing info can include the subscriber details when the relationship is anything other than “self” and would include the subscriber name and DOB when the relationship is spouse or child.

Desired Future State

The objective here is to prompt all within one screen during the insurance change process for the user to gather all of their needed details from the patient for the insurance subscriber.

Raintree Recommendation

There are really 2 avenues for improvement here that may help. With the first having a simplified workflow for the teams to follow, the SBP coverage correction tool option helps to enforce that the coverage correction process must be followed by users upon saving a change to the payors. This also provides the benefit of an updated workflow that does not have the user have to later go back and add the details for the parent or spouse if the policy is from a different member of the family. The second area of consideration is the ledger verifier that can help to surface when there are potential issues and help to resolve them early. The ledger verifier can be set to run automated solvers when there is a proposed solution from Raintree. This can also be run as a scheduled report that can help to highlight if and when there are common mistakes that can be used for internal training.

Dependencies / Decisions

Dependency for the proposed solution to use SBP workflow is a new enhancement that is behind a feature flag in latest service packs that the database would need to be on recent Raintree production service pack.

Execution profile: Available / Existing • Low–Medium effort • 0–30 Days

Detailed assessment reference: RCM-001

Form Script - SCHIN Flexibility in Column Configuration

PRN Current State	Currently there are a number of options for what details to show in the output for SCHIN invoices, however some of these display the Raintree internal quick code rather than the spelled out description or name.
Desired Future State	To meet desired output requests from payor sources
Raintree Recommendation	This would be a custom option to add additional columns to be able to configure within the form scripts specific to each payor what they would like to see included in the output. (Or added as a suggestion for future standard enhancement)
Dependencies / Decisions	It would need to be considered that this request may vary for different payors that are billed via SCHIN format.

Execution profile: Available / Existing • Low–Medium effort • 0–30 Days

Detailed assessment reference: RCM-002

Payor - Restriction on the BC selection option based on the comments section within that payor

PRN Current State

This is an option currently for P payors that we can add <BC:P> within the comments to limit the selection for that payor record to only the billcode of P.

Desired Future State

To help prevent mistaken selections the team would like the option for other payors to be able to indicate that the billcode can NOT be a P payor.

Raintree Recommendation

This would be an option to limit payors like the <BC:P> comment that would only allow a payor to be selected as a P, but instead would be something like does not equal a P. Currently this would be a custom request or a suggestion for a future enhancement.

Dependencies / Decisions

N/A as this would be an added safety precaution

Execution profile: Available / Existing • Low-Medium effort • 0-30 Days

Detailed assessment reference: RCM-003

Scheduling Restrictions in the Provider Table

PRN Current State	When there are filtered entries for a provider within the provider table the option for scheduler limitations is no longer available. The schedule limitations only are an option to define behind a default entry for a specific provider.
Desired Future State	There are a few goals that would be desired: A. No changes need to the current method used to structure entry of providers into the provider table where they are only applicable to the locations at which they actually treat B. This would allow to set scheduling restriction rules specific for filtered entries based on insurance/payor to correspond with the provider’s credential status
Raintree Recommendation	This would be an enhancement that would allow the scheduler restrictions to be put in place specific to the filtered entries within the provider table.
Dependencies / Decisions	Consider that the structure of the provider table currently includes filters for each provider for the locations at which they actually work out of.

Execution profile: Available / Existing • Low–Medium effort • 0–30 Days

Detailed assessment reference: RCM-004

Reports in Raintree - Report Scheduler

PRN Current State	Due to the size of the data set being collected these can take hours to compile and produce a result
Desired Future State	Reporting to be run with consistent filtering to ensure comparisons to historical status demonstrate a true (apples to apples) comparison
Raintree Recommendation	This was discussed further in the calls with BI dashboards and tools as these export data and show similar data, but the filtering in some cases is different than what had been used historically. To allow reports within Raintree to run with the same historical filters and to allow enough time for them to successfully finalize, we would suggest to run these based on the report scheduler to allow them to run with an automated process that can kick off behind the scenes and run during off hours. The resulting report can then be sent to a task or email to be waiting for the applicable user to review the subsequent business day.
Dependencies / Decisions	concerns about system stability and slowness were voiced-- specifically concerned about PATIENT AGING REPORT

Execution profile: Validate During Execution • Low-Medium effort • 0-30 Days

Detailed assessment reference: RCM-005

Refunds

PRN Current State

This is a manual process in which the team is refunding the credit card for the patient, but refunding the overpayments from each applicable payment line item within that patient ledger.

Desired Future State

The goals would be to simplify the identification, validation, review and issuing of refunds to patients. Long term also want to ensure the amounts collected at time of service as close to accurate as possible to help reduce the need for refunds to be issued in scenarios of patient overpayment.

Raintree Recommendation

The recommendations here approach the topic from two points of view: Retroactive Refunds: to ensure an easy process with the Refunds that need to be issued. With refunds there are a few standard tools that can be employed to aid efficiency of the processing of refunds: Find potential refunds - <https://kb.raintreeinc.com/help-10-2-500=find-potential-refunds-utility> and Import issued refunds- to in bulk post those so that these are not an item a user would need to enter. - <https://kb.raintreeinc.com/help-10-2-500=import-issued-refunds-screen> Review and processing using Rev-Edition Follow up Dashboard for visibility into the processing - <https://kb.raintreeinc.com/help-10-2-500=work-with-refunds-in-rev-edition> Proactive: to help ensure that at time of service the amount collected is as close to accurate as possible. This is where tools and options within the Patient Payment Agreement and Counseling Form (PPAC) can be used and templates to aid in their setup defined to model specific common scenarios. For example, setting models for when there is a high deductible plan and payment condition would indicate to only use the required payment while deductible not met, or for patients where insurance coverage may be inconsistent to only use when no insurance coverage.

Dependencies / Decisions

Shama added that there is a way on the ledger to refund the credit card, but its very manual. Today, they run the refund utility about once/month, exports to spreadsheet, then refund follow ups created. Humans have to manually follow up on this -- then they have to review how patients paid via credit card, etc, then they need to refund manually across different credit cards potentially. They want their patient account representatives (PARs) focused in other areas. They are also calling out considering use of Confido to help with incoming calls re this vs PAR.

Execution profile: Available / Existing • Medium-High effort • 31-90 Days

Detailed assessment reference: RCM-006

OTC Collections

PRN Current State

This is a metric that front desk teams are doing well at collecting the amounts identified during the initial verification of benefits.

Desired Future State

In the future the ideal would be to have feedback mechanisms that assist in updating the amounts to be collected during the course of the patient’s care.

Raintree Recommendation

For this I would suggest a follow up working session on PPAC templates to setup a few samples, which can be set to use the payment terms only while the deductible is not met, or to estimate when then deductible will be met, to more closely align with what the patient owes after insurance adjudication. As noted with the section on refunds these common use cases for a PPAC can be set as a templated model for the teams to work from. Another feedback mechanism that is helpful to use as an indication that amounts to collect should be updated are decreasing copay follow up notes within the Follow Up Dashboard. Sorting by this follow up code and then by reason codes can help to give an indication when deductible and/or out of pocket maximums have been met and time of visit collections are no longer needed. An additional avenue to consider is that PPAC’s can be sent to patients for signature via the patient portal prior to the first visit. If the patient has the opportunity to review the details in a more focused environment if they do have an HSA that will issue payments to cover their responsibility amount this can provide them more time to share this feedback with the team to ensure that the front desk team does not collect in scenarios where the patient would have payments sent from the HSA with the payor directly following payor adjudication.

Dependencies / Decisions

The suggested workflow would want to have a regional “owner” who could help to define templates for PPAC within their location category, as well as define routing rule within the follow up routing for who would work decrease copay (DECOP) follow up notes.

Execution profile: Available / Existing • Low–Medium effort • 0–30 Days

Detailed assessment reference: RCM-007

BILLING REPORTING

PRN Current State

There are not many reports currently run on report scheduler.

Desired Future State

To clearly see financial performance for the organization on a routine cadence with metrics that compare apples to apples with historically collected data.

Raintree

Recommendation

The time here is also discussed with BI reporting. Some of these can be set to run on report scheduler to run during off hours. The report scheduler tool can run reports that are consistently reviewed on a defined scheduled date. This can be used to ensure that the same report is run with consistent filtering from one run to the next so that metrics can be true comparisons. As the time for these runs can be defined by the user these can be set to run during off hours so that system performance will not be impacted and run time does not leave a user waiting. For reports where different iterations and drill downs would want to be review, these can be found in BI and these drill downs and components within the reports will be items that are accessible without having to completely re-run the report.

Dependencies / Decisions

Citing again concerns with system slowness and how this impacts their ability to run reports in Raintree. This also needs to keep in mind that they have run reports historically and will want to be able to compare metrics to historical trends and performance of the teams.

Execution profile: Available / Existing • Low–Medium effort • 0–30 Days

Detailed assessment reference: RCM-008

Ledger Lock

PRN Current State

User right for a ledger date lock is not in place across all user groups in the user/security table.

Desired Future State

To maintain ledger and reporting integrity for historical periods

Raintree Recommendation

Ledger Lock is recommended for use. Challenges that were discussed: For items that do need re-allocation best practice to maintain ledger lock integrity is to maintain the lock and not bypass it. The payment would still be re-posted, however the original incorrectly applied payment would be reversed and the correction would be posted all with a posting date of today (current day). In this way, the history is maintained and the historical stats remain consistent. The current day is a wash for overall cash receipts as there is a reversal and the reposting that correspond with one another. The correction will appear as a correction off of one location and onto another with the current day/month for the correction to reflect in financials.

Dependencies / Decisions

Concern with bypassing the ledger lock is reporting discrepancies when running for historical financials, in retrospective reviews, or upon audit the overall numbers for the organization. Even though the cash receipts may remain accurate if the item being corrected is to re-allocate a payment from one location to another, the payment would no longer show as collected in one location but rather show under the alternate.

Execution profile: Available / Existing • Low–Medium effort • 0–30 Days

Detailed assessment reference: RCM-009

Location History

PRN Current State	Some locations have been deactivated in the location table due to updates rather than updates that would be included within the location history.
Desired Future State	This method is used to ensure accurate updated data is included on claims moving forwards.
Raintree Recommendation	As this is consistent with the historical entries in their location table, continuing to use this method will maintain consistency and not need to update form script setup options. If this becomes difficult to manage we do have an option that would require a change to form scripts to use a fall back sequence from provider table to location table and could use a "default" provider with filtered entries to accomplish the accurate name with the applicable time frame for locations.
Dependencies / Decisions	N/A

Execution profile: Validate During Execution • Low-Medium effort • 0-30 Days

Detailed assessment reference: RCM-010

Automated Follow Up Actions

PRN Current State	In follow up routing rules there are not any “when due” rules defined. (screenshot provided below)
Desired Future State	Defining rules for some of the common actions taken by a team member can set these as an automated action, which can free up time for a real person to complete more complex claim follow up activities.
Raintree Recommendation	There is an attachment below that shows the process in a detailed recording: https://drive.google.com/file/d/1GfMiEsw7YKsc8hw2IAlipBfzMBIj6Hhr/view?usp=drive_link The suggestion would be to begin with some of the straightforward follow up actions like a sending of medical records and identify when the team is taking this action consistently - Which payors is that done for? What ANSI reason code does that payor process with? Once these questions are clearly known a routing rule can be defined to take action automatically on behalf of the team. Below in the workflow to define the rules section, we will see an example for an insurance of Aetna and reason code 252 defined to run an automatic action of “medical records sending”.
Dependencies / Decisions	These would be sent out via fax if possible, so may require a build up of fax numbers for the applicable insurance companies.

Execution profile: Available / Existing • Low–Medium effort • 0–30 Days

Detailed assessment reference: RCM-011

Follow Up Cues to Include Balance without Duplicates

PRN Current State	Currently not present on the Follow Up Dashboard.
Desired Future State	Show the balance of all charges in the follow up dashboard while accounting for the fact that some claims may have more than one follow up note open for them and thus be considered in the total balance more than once
Raintree Recommendation	This is an option that can be enabled by the Raintree team within the global.ini. To accomplish this a case will be the best method here as it is added into the global.ini during off hours and we will want to coordinate date and time to conduct this during off hours.
Dependencies / Decisions	N/A

Execution profile: Available / Existing • Low–Medium effort • 0–30 Days

Detailed assessment reference: RCM-012

"Not Touched" as a dropdown filtering options on Follow Up Dashboard

PRN Current State	This is a standard filtering option.
Desired Future State	Understand definitions of filtering options within the follow up dashboard
Raintree Recommendation	Reviewed definitions during call. Not touched - a real person user has not needed to complete a follow up action on this claim
Dependencies / Decisions	N/A

Execution profile: Validate During Execution • Low–Medium effort • 0–30 Days

Detailed assessment reference: RCM-013

Vendor for Insurance Coverage Detection

PRN Current State	This is not in place with PRN team and is currently in beta with organizations working with Waystar as their clearinghouse.
Desired Future State	Coverage detection is an option that is offered with clearinghouse partners as a method to review for active coverage with payors within the connection channels for that clearinghouse. This is used when coverage has ended or is not known for a patient to review if there is potentially an alternate policy that they are covered under.
Raintree Recommendation	With Waystar the prerequisites were that they were already using the eligibility results being retrieved from Waystar and that contracting with Waystar as the clearinghouse was updated to include coverage detection. As the offering would become expanded to Availity and beta groups are reviewed the PRN team should be considered as a group to work with the beta offering.
Dependencies / Decisions	Pending beta review

Execution profile: Available / Existing • Medium effort • 31–90 Days

Detailed assessment reference: RCM-014

Under Payment Detection

PRN Current State	This is currently only in place within PRN database with some default values.
Desired Future State	Under payment detection is an option that can be refined and added continually to help surface scenarios where insurance is paying short of the anticipated reimbursement.
Raintree Recommendation	This can be defined differently for payors that reimburse based on a fee for service model or a flat fee per visit. Below will be a link to slides from prior TherapyCon sessions that demonstrate not only how to define these behind specific payors but also how to run reporting to help in ensuring the targets defined are in line with actual reimbursements received. Link: Underpayment Detection - Slides TherapyCon 2025.pdf
Dependencies / Decisions	Not discussed on call however noted in database

Execution profile: Available / Existing • Low–Medium effort • 0–30 Days

Detailed assessment reference: RCM-015

RCM-016 | ACTIVATE & OPTIMIZE | 0–30 DAYS

TVBEN Completion Restrictions

PRN Current State No additional detail documented in the source analysis.

Desired Future State No additional detail documented in the source analysis.

Raintree Recommendation No additional detail documented in the source analysis.

Dependencies / Decisions Confirm through joint PRN + Raintree governance.

Execution profile: Validate During Execution • Low–Medium effort • 0–30 Days

Detailed assessment reference: RCM-016

Capitation Payors

PRN Current State	No additional detail documented in the source analysis.
Desired Future State	No additional detail documented in the source analysis.
Raintree Recommendation	No additional detail documented in the source analysis.
Dependencies / Decisions	Confirm through joint PRN + Raintree governance.

Execution profile: Validate During Execution • Low–Medium effort • 0–30 Days

Detailed assessment reference: RCM-017

RCM-018 | ACTIVATE & OPTIMIZE | 0–30 DAYS

Ledger Verifier

PRN Current State No additional detail documented in the source analysis.

Desired Future State No additional detail documented in the source analysis.

Raintree Recommendation No additional detail documented in the source analysis.

Dependencies / Decisions Confirm through joint PRN + Raintree governance.

Execution profile: Validate During Execution • Low–Medium effort • 0–30 Days

Detailed assessment reference: RCM-018

Fee Schedule

PRN Current State	No additional detail documented in the source analysis.
Desired Future State	No additional detail documented in the source analysis.
Raintree Recommendation	No additional detail documented in the source analysis.
Dependencies / Decisions	Confirm through joint PRN + Raintree governance.

Execution profile: Validate During Execution • Low–Medium effort • 0–30 Days

Detailed assessment reference: RCM-019

Revenue Cycle Transformation: Operating Actions

Recommended governance cadence: validate the highest-priority recommendations, assign PRN and Raintree owners, confirm capability status, sequence dependencies, and track measurable adoption/outcome indicators through the 0–120 day plan.

07 9 pre-built items from the Internal Master.

Validate the customer-facing language and supporting evidence before final delivery. Reporting & Analytics

1 detailed recommendations assessed. This chapter summarizes the operational opportunities and execution profile for this workstream.

Classification	Count	Operational Meaning
Enable & Adopt	1	Strengthen workflow, training and adoption.

Priority operating principle

Sequence immediate optimization and standardization before treating every workflow issue as a net-new product requirement. Preserve roadmap and integration dependencies as explicit governed workstreams.

Connect Dashboard

PRN Current State	Indhu review of the new Lead conversion report that she created for PRN. Also review of the NPS dashboard.
Desired Future State	Give PRN leaders actionable visibility into lead conversion and NPS performance through the Connect dashboard.
Raintree Recommendation	Use the Lead to Patient Conversion report delivered on 8/31 as the standard Connect view and confirm access/adoption with PRN.
Dependencies / Decisions	PRN did voice concerns on the loading time, Indhu stated this was likely related to being on zoom at same time, as well as explained that the first time a report is run it may take a little longer.

Execution profile: Validate During Execution • Low–Medium effort • 0–30 Days

Detailed assessment reference: ENT-001

9 pre-built items from the Internal Master. Validate the customer-facing language and supporting evidence before final delivery. Reporting & Analytics: Operating Actions

Recommended governance cadence: validate the highest-priority recommendations, assign PRN and Raintree owners, confirm capability status, sequence dependencies, and track measurable adoption/outcome indicators through the 0–120 day plan.

08 Enterprise Intelligence & Performance

8 detailed recommendations assessed. This chapter summarizes the operational opportunities and execution profile for this workstream.

Classification	Count	Operational Meaning
Activate & Optimize	4	Use more of what is already available.
Configure & Standardize	4	Reduce variation and establish enterprise standards.

Priority operating principle

Sequence immediate optimization and standardization before treating every workflow issue as a net-new product requirement. Preserve roadmap and integration dependencies as explicit governed workstreams.

Executive Dashboard

PRN Current State	Review of the 3 tabs: operational, financial and financial detail
Desired Future State	Provide executive-level operational and financial visibility with consistent comparison logic across locations and time periods.
Raintree Recommendation	Validate the custom executive-dashboard approach recommended by Indhu, including treatment of location/TIN changes, before standardizing the view for PRN leadership.
Dependencies / Decisions	Matt asking about when PRN does TIN changes and they merge locations, how is this data pulled. Siim explained that if they change were to occur during the comparison period, it would not be a fair comparison.

Execution profile: Validate During Execution • Low–Medium effort • 0–30 Days

Detailed assessment reference: BI-002

RCM Dashboard

PRN Current State	Review of the available tabs including KPI summary trend; Accounts Receivable tab; Productivity Tab; and review tab by tab of all available reports in this dashboard
Desired Future State	Provide a trusted RCM dashboard with clearly defined metrics and consistent reporting logic.
Raintree Recommendation	Use the shared RCM Dashboard dictionary and validate PRN-specific definitions/configuration, including the Bad Debt logic already addressed through PRN BI reporting.
Dependencies / Decisions	Indhu did call out that she did review the Waterfall report with PRN on a prior recent call. Christina called out that the Bad Debt numbers are incorrect, Siim explaining that PRN would need to build a custom table to include the right codes. Christina said they have already developed a report in BI for bad debt.

Execution profile: Validate During Execution • Low–Medium effort • 0–30 Days

Detailed assessment reference: BI-003

Standard Operations Dashboard

PRN Current State	PRN reviewed Scheduling Capacity within the Standard Operations Dashboard.
Desired Future State	Use a consistent operational dashboard to monitor scheduling capacity and related clinic performance.
Raintree Recommendation	Validate the Standard Operations Dashboard configuration against PRN scheduling-capacity requirements before finalizing the recommended view.
Dependencies / Decisions	PRN confirmation of the desired capacity measures, filters, and audience.

Execution profile: Validate During Execution • Low–Medium effort • 0–30 Days

Detailed assessment reference: BI-004

RCM At a Glance

PRN Current State	SME VALIDATION REQUIRED: The current source material does not contain enough detail to complete this field without additional SME input.
Desired Future State	SME VALIDATION REQUIRED: The current source material does not contain enough detail to complete this field without additional SME input.
Raintree Recommendation	SME VALIDATION REQUIRED: The current source material does not contain enough detail to complete this field without additional SME input.
Dependencies / Decisions	SME VALIDATION REQUIRED: The current source material does not contain enough detail to complete this field without additional SME input.

Execution profile: Available / Existing • Low–Medium effort • 0–30 Days

Detailed assessment reference: BI-005

BI-006 | ACTIVATE & OPTIMIZE | 0–30 DAYS

Provider Scorecard

PRN Current State	PRN needed access to a provider-level productivity view in BI.
Desired Future State	Enable PRN administrative leaders to monitor provider productivity through the Provider Scorecard.
Raintree Recommendation	Use Provider Scorecard for provider productivity monitoring. Access was enabled for PRN on 9/23/26 and walkthrough details were provided.
Dependencies / Decisions	PRN is on the new pipeline, RT team working on adding Provider Scorecard to PRN’s BI instance. 9/23/26: Access to Provider Scorecard enabled for PRN. Walkthrough Video and details emailed to PRN.

Execution profile: Validate During Execution • Low–Medium effort • 0–30 Days

Detailed assessment reference: BI-006

Copay report mismatch with Core Raintree

PRN Current State	PRN identified a mismatch between the BI copay report and the Classic Raintree report.
Desired Future State	Use a copay report that aligns with the Classic Raintree result and can be trusted for operational reporting.
Raintree Recommendation	Teresa and Marko met with Shama and tweaked the BI report to match the classic Raintree report which can now be used by PRN
Dependencies / Decisions	CoPay collected – Christina calling out that this report is not matching classic raintree report - provided ProActive example Update: Teresa and Marko met with Shama and tweaked the BI report to match the classic Raintree report.

Execution profile: Validate During Execution • Low–Medium effort • 0–30 Days

Detailed assessment reference: BI-007

Clinic Directors Report (Classic Raintree)

PRN Current State	Clinic Directors need a simpler way to receive actionable lead metrics and do not find the current BI workflow sufficiently user-friendly for this use case.
Desired Future State	Deliver Clinic Director metrics in a repeatable format that is easy to consume without requiring complex BI navigation.
Raintree Recommendation	Pilot the Classic Raintree Report Scheduler/Connect report workflow with Jeff and Casey, then determine whether to scale scheduled distribution to all Clinic Directors.
Dependencies / Decisions	Jeff Lipkin calling out that he thinks that BI in general is not as user friendly for the CDs, and wants more help on how to set up their clinics with how to view the data Met with Jeff on 9/17 and based on the requirements he presented, the Report scheduler option in Classic Raintree would be most suited for CDs getting the metrics around “not converted” leads.

Execution profile: Available / Existing • Low–Medium effort • 0–30 Days

Detailed assessment reference: BI-008

Duplicate item - Provider Scorecard is listed earlier

PRN Current State	SME VALIDATION REQUIRED: Confirm and complete from the source workflow/product owner before customer delivery.
Desired Future State	SME VALIDATION REQUIRED: Confirm and complete from the source workflow/product owner before customer delivery.
Raintree Recommendation	SME VALIDATION REQUIRED: Confirm and complete from the source workflow/product owner before customer delivery.
Dependencies / Decisions	SME VALIDATION REQUIRED: Confirm and complete from the source workflow/product owner before customer delivery.

Execution profile: Validate During Execution • Low–Medium effort • 0–30 Days

Detailed assessment reference: BI-009

Enterprise Intelligence & Performance: Operating Actions

Recommended governance cadence: validate the highest-priority recommendations, assign PRN and Raintree owners, confirm capability status, sequence dependencies, and track measurable adoption/outcome indicators through the 0–120 day plan.

Transformation Governance

Use the Master Dataset as the single source of truth for recommendation status, timing, ownership, evidence and RFP traceability. Changes to product availability or sequencing should be updated in the dataset first, then reflected in the website and client documents.