

# Unlocking revenue by transforming documentation from bottleneck to workflow

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## CHALLENGE

Billing was consistently on hold due to incomplete, delayed, and fragmented documentation, leaving millions in revenue unreleased and teams burdened with manual follow-ups.

## SOLUTION

CitusHealth replaced manual, disconnected processes with an automated documentation workflow that accelerates completion, improves visibility, and enables predictable billing readiness.

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Vital Care Infusion Services is a national network of pharmacies delivering specialized infusion therapies for patients with complex chronic and acute conditions. Across multiple locations, operational leaders are responsible not only for delivering high-quality care, but also for ensuring that the business runs efficiently in an environment where reimbursement depends entirely on complete and timely documentation.

For Michelle Hudson, RN, IgCN, Director of Operations across Marcie Parker-affiliated locations, the challenge was clear. Documentation gaps were directly impacting financial performance. Their most significant challenge was managing billing holds, which at times averaged \$10 million collectively across five locations. Her team needed a better way to support complete, timely, and visible documentation across the organization.

## When documentation breaks down, revenue stalls

Before implementing CitusHealth, documentation workflows were manual and highly fragmented. The process was time-consuming and difficult to scale.

“Our intake process was entirely manual. Staff completed admission paperwork by hand, copied it, filed it alphabetically in physical notebooks, and followed up weekly on outstanding documents,” Hudson said.

This approach created predictable failure points. Documents were often delayed, incomplete, or missing signatures. “Any workflow requiring signatures, especially admission agreements, was prone to delays and errors,” she noted. At times, resolving a single documentation issue could take weeks or even months.

The impact extended far beyond operations. “Without these documents, claims could not move into accounts receivable,” Hudson explained. With medications purchased upfront, delayed reimbursement created real financial risk. Billing on hold became a systemic constraint on cash flow and growth.

## A turning point toward standardized workflows

As billing holds grew and visibility remained limited, it became clear that incremental fixes would not be enough. “Escalating billing holds, lack of visibility for staff and patients, and fragmented communication made it clear that a new solution was essential,” Hudson said.

CitusHealth introduced a fundamentally different approach. Instead of chasing documentation after the fact, the platform enables organizations to complete and collect required documentation upfront through a centralized, digital workflow.

“With CitusHealth, we now send SOC and admission paperwork before dispensing, which has been transformative,” Hudson said. By shifting documentation earlier in the process and standardizing how it’s completed, Vital Care’s average time for admission paperwork to be returned and automatically integrated into Caretend is under 24 hours.

Equally important, completed documentation is no longer siloed or manually routed.

follow-ups have been significantly reduced, allowing staff to focus on higher-value work. The platform also enabled more effective communication across stakeholders without relying on constant phone calls.

“The ability to communicate digitally, without relying on repeated phone calls for confirmations, follow-ups, or scheduling,” Hudson said, “aligns perfectly with today’s tech-savvy patient expectations.”

For leadership, the biggest shift was visibility. Instead of relying on static reports and spreadsheets, teams could see documentation status and billing readiness in real time. This created a more proactive operating model where issues can be addressed before they impact reimbursement.

Looking ahead, Hudson sees even greater strategic value. “I’m eager to leverage CitusHealth’s reporting capabilities to compare productivity and billing performance across locations. That level of insight will be invaluable for leadership decision-making and growth planning.”

### **Building confidence in reimbursement and growth**

By transforming documentation from a fragmented, manual process into a standardized workflow, CitusHealth helped shift billing on hold from a chronic issue into a manageable exception.

Hudson and her team now have confidence that documentation is complete, that claims will move forward, and that the organization can scale without introducing operational chaos.

“CitusHealth has already reduced manual effort and improved day to day workflows,” Hudson said, “with even greater upside ahead.”

“One of the biggest wins is CitusHealth’s ability to automatically route completed documents directly into Caretend, dramatically improving workflow efficiency and accountability.”

MICHELLE HUDSON, RN, IGCN,  
DIRECTOR OF OPERATIONS ACROSS  
MARCIE PARKER–AFFILIATED LOCATIONS

This combination of automation, standardization, and real-time visibility replaced fragmented communication with a predictable, auditable system that supports both clinical and financial operations.

### **From reactive follow-ups to proactive visibility**

The shift to a digital, centralized workflow has fundamentally changed how teams operate. Manual tracking and repeated

## **RESULTS**



**78% documentation completion rate year to date**, supporting faster movement into accounts receivable and more predictable reimbursement timing



**Reduced manual follow-ups, administrative burden, and reliance on spreadsheets**



**Leadership confidence in financial performance and the ability to scale without added complexity**