Phase 2 Introduction

Phase 2 provides an overview of the Interface section followed by training in the Patient, Claim, and Appointment sections (If Applicable). We will check the status of Payer Agreements, and confirm if there are any questions in regards to payer agreements.

In addition, Included service features will be reviewed along with the current account pricing and we will discuss how to configure the settings of the included service features. For example, our Integrated Payment Processing is a feature that is included with all plans and customers that will help drive increased revenue.

In Phase 2 when going over the Interface Section, we will confirm if notification was received by the customer for submitting the integration request within CollaborateMD and/or on the Interface vendor's website (Practice Fusion ex.) (if Applicable). We will review how the interface functions along with setup and confirm if they are submitting encounters/charges. The Patient Section will then be reviewed and discussed on how to add patients, add insurance information, check eligibility, patient billing information/utilization, print patient ledger/statements, and claims defaults.

We will transition over to the Claim section and discuss Real-Time Claim Submissions including Claim settings at the customer level, how to add a claim, discuss How invoicing is affected by the Rendering Provider Name on the claim, point out the COPAY field needed when utilizing the Unapplied Copay feature, Claim fields and their functionality, How Claim Scrubbing/Review works (If Applicable), and Batch Printing of claims. We will then turn our attention to the Claim Control section where we will go over reviewing and submitting interface claims, submitting a batch of claims in test, and lastly reviewing Appointments (if applicable).