Phase 2 Exit Criteria

- Understand Look-up Payer Agreements in CollaborateMD and Connect Center

- Document Storage (If Applicable)

- Create and Manage Patients

    - Able to add new patients

    - Understand Insurance Information, adding of copays to

    - Understand How to check eligibility

    - Understand How to print patient Ledger & Statement

    - Understand Billing Info & Claim defaults

    - Understand Print & Patient Merge Options

    - Understand More Options

- Perform batch-level items

    - Interface Tracking for interface claims

    - Claim Control for interface claims

    - Batch Print Claims

    - Batch Eligibility

- Add and Manage Claims

    - Understand Claim Settings and enabling of RTCS

    - Understand Enabling of Unapplied Copays when claims entered

    - Understand invoicing by Rendering Provider Name

    - Understand COPAY field when associated with the Unapplied Copay and functions

    - Understand Charges and Other field for NDC and CLIA numbers

    - Understand benefits of fee schedule

    - Understand Claim Summary vs. Activity, benefits of Alerts

    - Understand Print Options, Show Preview

- - Understand More Options

  - Understand How Claims Scrubbing/Review works (if applicable)

  - Understand Batch Print Claims

  - Understand how to submit Test Claims

- Managing claims using Claim Control

  - Understand how to locate/review and submit interface claims

  - Understand claims in a batch for test

  - Understand Waiting for Review/Incomplete claims and save filters

  - Understand Right click capabilities: Show Details or Open Claim/Patient

  - Understand Submitting claims (Default billing status for payer/code)

- Create and manage appointments (if applicable)

  - Configuration requirements: Resources, Appt Types, and Custom Status & Settings

  - Create and modify appointments

  - Create and Manage Block Schedule

  - Understanding searching for appointments

  - Understand the benefit of Appointment Reminders