

Phase 3 Entrance Criteria

† Modified on 02/26/2025 2:55 pm EST

- 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 schedules
 - 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 benefit of Appointment Reminders
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