

Phase 4 Entrance Criteria

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- **Payer Agreement**
 - Understanding **New Agreement**
 - Understanding **Search Existing Agreement - Status**
- **Claim Control**
 - Understanding Filters
 - Understanding Search Claims
 - Understanding Review Claims
 - Understanding Interface Claims (If Applicable)
 - Understanding Update Status and submit batch of Live Claims
 - Understanding RTCS Results
- **Claim Tracker**
 - Understanding Track Live Claims
 - Able identify and review clearinghouse and payer acceptance and rejected claims
 - Able to Create Filters (Yesterday, Last 7 days, & Last 30 days) search claims
 - Understanding and Read results - example Correcting, resubmitting and marking as Error Fixed
 - Understanding Right-click capabilities: Open Claim etc
 - Understanding and able to view Reports (Clearinghouse & Payer Generated), proof of timely filir (CA, SR, SB and SE files)
- **Follow-up Management**
 - Understanding Filters
 - Able to search claims submitted
 - Understanding batch options, adding notes, set follow-up, claim status
 - Understanding follow-up screen, reference information, contact payer info, benefits of using Expected Payment info
 - Understanding how to add Follow-up Note

