

HEALTH OF PRACTICE CHECKLIST

- We read **Release Notes** and update our internal documentation and training accordingly
- We use the **Help Center** to answer questions and internally train
- We have set the **Job Scheduler** to run:
 - Eligibility- daily
 - Assigned staff to review the results
 - Claims - daily or bi-daily
 - Statements- weekly
- Claims**
 - Encounters by Status
 - We work Clearinghouse, Local Edit, Payer rejections Daily
 - We review and claims in 'Crossed from Primary' if they are not adjudicated in a timely fashion- 15-45 days
- Statements**
 - We check the dashboard for any address corrections
 - We run at least once a week
- We use **Work Lists**
 - Revenue Cycle Management: To communicate internally to follow-up on claims in a timely manner
- We post our **Receipts** in full, as soon as possible
 - We review Receipt History, filtered for 'Escrow Only'
 - We review after each **ERA** is applied and all remits are posted in full, DW and Holds are managed
- We use these **Reports**:
 - We regularly run **Interactive Aging** (IA from the Go-box) and/ or **Unresolved Claims**
 - Review and address issues ie: old A/R, and unusual credits, Patient A/R that qualifies to be billed to insurance or should have been collected by front desk
 - Receipts Management** - daily report used for Bank deposit
 - Missing Encounters** -if we use the scheduling module, identify any appointments that are missing corresponding charges (encounters)
 - Aging by Patient**
 - Filter for credits to send refunds or re-apply
 - Period Analysis & Closing**: We close our accounting period monthly
 - Allowed Fee Exceptions**
 - We loaded Allowed fees (Medicare is recommended) and run the report to look for insurances that are allowing less than this standard. This helps us decide if we want to reach out to any payers to review their allowed amounts and decide if we want to continue to do business with them
 - We use **Saved Report Filters**, and Schedule our favorite Reports
 - We 'Pin' frequently used items to our Home Dashboard
- EHR/EMR Interface** - if using
 - All incoming messages are mapped