

VertexDr

NEW SMART^Q: INFORMATION AT YOUR FINGERTIPS

JUNE 8-9, 2016 | VERTEXDR CLIENT FORUM

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a MERIDIAN MEDICAL MANAGEMENT company



Please silence or turn off all
electronic devices at this time.

THANK YOU

Smart^Q Agenda

- Introducing Smart^Q
- Benefits
- What are Smart Actions
- Demonstration
- Reporting
- Question/ Answer Session

Introducing Smart^Q

- Work Queue within VertexDr housing ALL outstanding receivables, including:
 - All ERA and EOB denials
 - No response claims (claims where average processing time lapsed with no denial or payment posted)
- Ability to build worklists and assign to specific users

Put Smart^Q to Work

Efficiency

- One time study shows
 - increased productivity by up to 86%
 - 1.9 Times Faster than Traditional Methods
- Avoid duplication of work
- Streamline workflows
- Reduce paper

Effectiveness

- Real Time Assignments
- New inventory Daily
- Quickly identify Project work / low hanging fruit

Put Smart^Q to Work

Quality / Accountability

- Accurate Reflection of Outstanding Inventory
- Transparency
- Real Time Refresh of inventory
- Audit trail of actions taken by users

Reporting

- Full Reporting Capability
 - Productivity
 - Stats
- Sort and Filter within application and exportable to excel
- Information at Your Fingertips
- Trending

Smart^Q View

My Desktop


View SmartQ: Yes No

Worklist: Users Productivity Stats

Category:

Aging:

Filter:



Total Claim Balance: \$193,226.40

Records: 1922

Locate by:

Worklist	DaysInQ	Aging	Filing Limit Days	Fcls	Insurance	Last Name	First Name	Claim Balance	Category	Code Description	DOS	Code Source	Membership	Last Submit Date	Action Date	Action Description	ActionSecID	SVC	Claim Amount
INS SUB NO...	8	204	-153	AA	AUTO ACCIDENT	NUNES JR	TRACEY-ANN	175.00	Insurance Sub...		10/10/2016		U7M2092	1/12/2017	5/11/2017	ESCALATE TO MA...	CZP	MACK	175.00
INS SUB NO...	8	265	-746	CTC	CONNECTICARE	CATANIA	DOROTHY(DOR...	169.04	Insurance Sub...		02/25/2015		97044936701	3/3/2015	5/11/2017	CODING PENDING...	CZP	MACK	416.00

Manager: Building a filter

VertexDr SmartQ Filter Definition

Filter Options | Category Codes | Insurance | Fcls | Locations | Providers | Type Codes | SmartQ Actions

SmartQ Filter Definition

Filter Name:

Inventory Filter:

Filter Options

Service From Date: To Date:

Balance Type:

Group Id:

Balance Range Low: High:

Aging Range Low: High:

Pat LstName From: To:

Individual Selections

Category Codes:

Insurances:

Fcls:

Locations:

Providers:

Type Codes:

SmartQ Actions:

OK Cancel

Manager: Building a filter

VertexDr SmartQ Filter Definition

Filter Options | **Category Codes** | Insurance | Ecls | Locations | Providers | Type Codes | SmartQ Actions

SmartQ Filter Definition

Select Categories

Locate by Description: Search... Clear

ID	Description
2	Appeal Denied Reason
3	Authorization/Referral Reason
5	Bundled Service Reason
7	Capitation
8	Claim Info Reason
10	CLAIM PAYER EDITS
11	Claim Pending Reason
12	Coding Related Reason
14	Contract Specialty
15	Coordination of Benefits Reason
16	Credentialing Related Reason
18	Documentation Needed Reason
20	Duplicate Reason
22	Eligibility Reason
24	Informational Reason - Y
27	M3 Override Reason
28	Medical Necessity
29	Medical Records Request Remark
30	No Task - No Transfer

OK Cancel

Smart^Q Actions

What are smart actions?

- Automated action that records the action and then takes the action for you, reducing manual efforts.

Examples:

- Bill patient – takes action to bill patient
- Claim resubmitted – rebills claim to carrier

Smart Actions

What else can they do for you?

- Provide ability to easily audit inventory
- Provide trending
- Rules can be applied to action codes, ensuring appropriate routing of the inventory.

Smart^Q Biller view

File View Activities Reports Forms Transactions

Back Save Save & Exit Save & Locate New Transaction Update... Explode... Resubmit Claim Status **SmartQ Actions** Ack History

Patient Definition Carol J Perrotta (NKDA)
Birth Date: 4/29/1943 74 Year Old Cases: 1 Balance: 525.00 Next Visit: None

Inquiry Data

Current Transactions [All Transactions](#)

Service Date	Action	Description	Amount	Remaining	Providing MD	Referring MD	Assistant MD	Location	Submit Type	Financial Class	Claim No/Se
Guarantor: CAROL PERROTTA (1 Patient) - Today's Activity: 0.00											

VertexDr SmartQ Action Table

SmartQ Action Table
This table contains all of the SmartQ Actions.

Locate By: Name Search...

Id	Action	StatusDays	WorklistId
1	ADJUSTED CLAIM	0	0
2	CODING ISSUE M3	0	0
3	CODING COMPLETE	0	0
4	CALLED PATIENT LEFT MESSAGE	0	0
5	CLAIM IN PROCESS	0	0
6	INSURANCE FOLLOW UP	0	0
7	INSURANCE UPDATED AND RE-BILLED	0	0
8	CREDENTIALING ISSUE	0	0
9	CLAIM RESUBMITTED	0	0
10	PAYMENT POSTING CORRECTION	0	0

Select Cancel

40 Actions located

Smart^Q Demo

Smart^Q Video

- Manager Filter/Assign
- Employee action & Productivity report

Productivity Reporting

	A	B	C	D	E	F	G	H	I	J	K
1	Action Date	ActionDescription	ActionSec	Worklist	DaysInQ	Aging	Filing Limit	Fcls	Insurance	Last Name	First Name
2	5/25/2017 10:17	CLAIM IN PROCESS	CZP	ELIG DENY	8	7	356	SW	MEDICAID	ROTHER	JANE
3	5/25/2017 10:21	CLAIM RESUBMITTED	CZP	ELIG DENY	8	73	189	MC	RAILROAD	BOWEN	CLINTON
4	5/25/2017 10:24	CLAIM RESUBMITTED	CZP	ELIG DENY	8	14	164	CTC	CONNECT	MCELROY	PATRICIA
5	5/25/2017 10:25	BILLED THE PATIENT	CZP	ELIG DENY	8	7	242	MC	MEDICARE	THEOFANI	PHILIP
6	6/1/2017 14:24	BILLED THE PATIENT	CZP	INS SUB NO RESP	8	41	78	AHP	AETNA HE	CEBEREK	BRENDAN
7	6/1/2017 14:26	CLAIM RESUBMITTED	CZP	INS SUB NO RESP	8	549	-502	BCS	BLUE CRO	THOMPSON	ANDREA
8	6/1/2017 14:27	CALLED PATIENT LEFT	CZP	INS SUB NO RESP	8	353	-296	WC	WORKERS	RODRIGUE	CLAYTON
9	6/1/2017 14:27	CALLED PATIENT LEFT	CZP	INS SUB NO RESP	8	395	-338	WC	WORKERS	RODRIGUE	CLAYTON
10	6/1/2017 14:27	CLAIM IN PROCESS	CZP	INS SUB NO RESP	8	356	-342	WC	WORKERS	RODRIGUE	CLAYTON
11	6/1/2017 14:28	BILLED THE PATIENT	CZP	INS SUB NO RESP	8	204	-153	AA	AUTO ACC	NUNES JR	TRACEY-AI

Smart^Q STATS

Users	Productivity	Stats
Inventory Description List		
Initial Inventory 587	Worked 31	
Additional Inventory 824	Satisfied 0	
Total Inventory 1411	Auto Satisfied 0	

Smart^Q

Total Claim Balance: \$43,999.82
Records: 306

Questions?

Presentation Available Post Forum



VertexDr

VERTEXDR TRAINING PORTAL



VertexDr

THANK YOU!

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