

OP RCM Client Corner: Training Plan and Resources

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Getting Started



Welcome to the OP RCM Client Training Plan and Resource page!

We are excited that you are here! Your success is important to us, so we want to make sure that you have access to training resources when you need them the most. As a reminder and to set expectations, here is a summary of the responsibilities tasked to your practice team and to the OP RCM team.

Summary of Workflow When Partnering with OP's RCM Team

Detailed View of Practice, RCM, and Shared Responsibilities

Process	
Insurance Eligibility	Confirmation of insura
	Payor credentialing (ci
Provider &	Contract with clearing

Training Plan Overview

OP RCM Client: Training Plan Overview



1.) Your Training Plan begins with your completion of your assigned eLearning*. The completion of your assigned online learning serves as a pre-requisite to your instructor-led training sessions. Your training sessions will be most productive if you have already completed the assigned eLearning!

*Note: eLearning login credentials are needed for complete the assigned eLearning. If you are not sure if you have these





credentials, please confirm with your practice's leadership. To purchase eLearning, please contact your practice's Client Solutions Manager.

Prior to Session 1, complete:

- OP 20- All Roles: OP Overview Core Curriculum
- OP 20- Front Desk Core Curriculum

*While these lessons are specifically related to Session 1, they also serve as foundational learning for all of the instructor-led training sessions.

Prior to Session 2, complete:

• OP 20- OP RCM Client Core Curriculum

Take me to eLearning!



2.) After completing the prerequisite eLearning, you will attend four instructor-led training sessions with OP experts! These sessions are designed to expand on what you learned in the eLearning. You'll learn workflow and best practice while picking up some tips and tricks along the way. Roll up your sleeves! Because in these session, you'll be taking the wheel!

Session Objectives

Need additional training?

- If you are actively in the Implementation phase and have any questions about the information on this page or to purchase eLearning or additional instructor-led training sessions, please contact your **Project Manager**.
- If you are not in Implementation and have questions or would like to purchase training, please contact your **Client Solutions Manager**.



3.) As you complete your instructor-led sessions, you'll likely want to have some post-session resources. These resources serve as refreshers to content you learned during the session(s). Click the tabs located at the top of this page to access a recap and resources specific to each session.

Post-Session 1

Instructor-led Session 1: Insurance Entry and Validation





Congratulations! You've completed your first instructor-led training session! Here is a recap and your post-session resources...

Prior to Session 1, you should have completed the following eLearning:

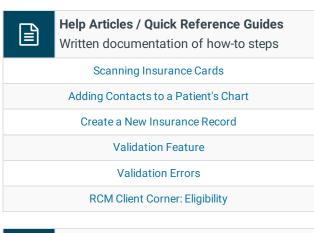
- OP 20- All Roles: OP Overview Core Curriculum
- OP 20- Front Desk Core Curriculum

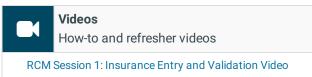
What you learned in Session 1

In this session, you learned how to:

- Scan a patient's insurance card and save it to the patient chart
- · Complete the Family Contact information to include the guarantor who will receive statements
- Review the importance of the Patient Responsibility Guarantor selection
- Enter new insurance into a patient's chart
- · Validate insurance and review validation
- Enter insurance for newborns that are pending insurance coverage

Post-session Resources





Post-Session 2

Instructor-led Session 2: Scrubbing Superbills and Marking them Ready

Congratulations! You've completed your second instructor-led training session! Here is a recap and your post-session resources...

Prior to Session 2, you should have completed the following eLearning:

- OP 20- All Roles: OP Overview Core Curriculum
- OP 20- Front Desk Core Curriculum
- OP 20- OP RCM Client Core Curriculum

What you learned in Session 2

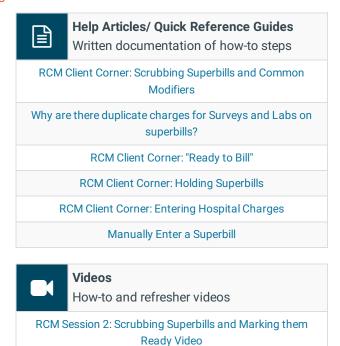




In this session, you learned how to:

- Review and edit superbills from Tracking, including:
 - · Accessing chart notes, if needed
 - o Adding missing modifiers to a superbill charge
 - · Adding missing CPT codes and/or diagnosis code to a superbill charge
- Mark a superbill ready for RCM to bill from Tracking
- Mark charges "Ready to Bill" from a visit note in the Patient Chart (applicable if a Provider is marking the Billing Stage)
- · Review superbills that are placed on hold by RCM from the Superbills tab of the Billing Center
- View a list of newborns who are pending insurance and activate their active insurance
- (If applicable) Enter Hospital Charges and mark them ready for RCM to bill

Post-session Resources



Post-Session 3

Instructor-led Session 3: Patient Payments and Balancing

Congratulations! You've completed your third instructor-led training session! Here is a recap and your post-session resources...

Prior to Session 3, you should have completed the following eLearning:

- OP 20- All Roles: OP Overview Core Curriculum
- OP 20- Front Desk Core Curriculum
- OP 20- OP RCM Client Core Curriculum

What you learned in Session 3

In this session, you learned how to:

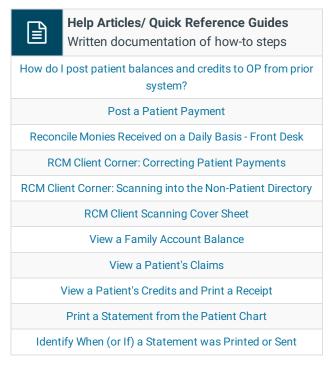
- (If applicable) Enter patient balances from a legacy system
- Enter payments made for patient balances

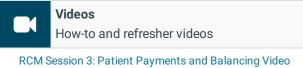




- · Balance payments collected for the current day
- (If applicable to practice Billing team) Balance payments collected that have already been processed on a daysheet
- Scan EOBs into the Non-Patient Directory
- Navigate the Account sections of a patient's chart including:
 - Account Summary
 - Claims
 - Credits
 - Statements
 - Disclosures

Post-session Resources





Post-Session 4

Instructor-led Session 4: Reports

Congratulations! You've completed your final instructor-led training session! Here is a recap and your post-session resources...

Prior to Session 4, you should have completed the following eLearning:

- OP 20- All Roles: OP Overview Core Curriculum
- OP 20- Front Desk Core Curriculum
- OP 20- OP RCM Client Core Curriculum

What you learned in Session 4





In this session, you learned how to run reports to measure:

- Total Charges by Rendering Provider
- Payments by CPT
- Appointments without charges billed
- Funds received in the practice's bank account
- Patient A/R

Post-session Resources



