

# PINNACLE TRAINING FLOW

STUDY Blue Books for at least 15 minutes each day. This is what separates ROCKSTAR CAs from ordinary CAs. I believe you are ROCKSTAR material!

Review Checklists at the beginning and end of each shift.

This material isn't "set it and forget it." It is continually building off of itself.

What to Know	"I feel confident with"	"I need help with"
Understanding Flow <ul style="list-style-type: none"> <li>• How to talk to patients</li> </ul>		
Flow <ul style="list-style-type: none"> <li>• NP</li> <li>• ROF (IST Verbiage)</li> <li>• Daily Visit</li> </ul>		
Phone Calls <ul style="list-style-type: none"> <li>• Straightforward</li> </ul>		
Scheduling <ul style="list-style-type: none"> <li>• NP</li> <li>• ROF</li> <li>• Daily Visit</li> <li>• Moving an appointment</li> </ul> Checking Patients In		
Back Office <ul style="list-style-type: none"> <li>• Financial Verbiage</li> </ul>		

<ul style="list-style-type: none"> <li>• Vitals (and Vitals Verbiage)</li> <li>• How to enter Vitals in Innate</li> <li>• How to set up the X-ray software</li> <li>• How to set-up the X-ray machine</li> <li>• How to position for X-rays</li> <li>• How to reset the Exam Room so it is ready for the next patient</li> </ul>		
<p>Insurance Benefits</p> <ul style="list-style-type: none"> <li>• Co-pay</li> <li>• Deductible</li> <li>• Co-Insurance</li> <li>• OOP</li> <li>• In-network vs. Out-of-network</li> <li>• Visits</li> <li>• How to copy Insurance Cards and IDs</li> </ul> <p>Opening &amp; Separating Mail</p>		
<p>Scanning</p> <ul style="list-style-type: none"> <li>• Into Files</li> </ul> <p>Emails Texts Faxes</p>		
<p>CPT Codes</p> <ul style="list-style-type: none"> <li>• Allowed Amounts</li> </ul> <p>Diagnosis Codes</p> <p>Medicare Personal Injury (PI/MVA) Regular Insurance</p> <p>Limit vs. Estimate</p>		

<p>Checking Out</p> <ul style="list-style-type: none"> <li>• Scheduling</li> <li>• Notes/Updating Treatment Plans</li> <li>• Diagnosis Codes</li> <li>• Express Notes/Finances</li> <li>• CPT codes</li> <li>• Payment</li> <li>• Exit Note</li> <li>• Complete</li> <li>• Colored Dots</li> </ul>		
<p>EOBs</p> <ul style="list-style-type: none"> <li>• Printing EOBs</li> <li>• Reading and Understanding EOBs</li> <li>• Are there any Errored EOBs?</li> <li>• How to Autopost</li> <li>• How to enter paper EOBs and copy check</li> </ul>		
<p>COC</p> <ul style="list-style-type: none"> <li>• How to make a COC</li> <li>• How to present a COC (verbiage)</li> </ul>		