

Financial CA supporting the DR			
	PREP for the adjustment	During the adjustment	AFTER the adjustment
Financial CA helps the Patient	Setting patients up to win with simple and clear finances	Supernatural listening - Looks out for patients	Receiving patient questions
	P. R. E. S. - confirm patients to meet with: in person that day	B. O. S. S. with patients	Addressing patient financial questions
	Re-X and AR patients finances for the day prepared	Asks questions of patients engagement in care	Cross check notes and billing codes
	New Patient Report finances prepared	Acknowledge Drs & team specifically	Billing - insurance and cash patients
	Research answers to questions	Acknowledge Drs & team specifically	Follow up on billing
	Review swipes to see if an did not process	See opportunities for growth and respond	Follow up on swipes not processed
Financial CA helps the Doctor and Team	P. R. E. S. - writes in times when insurance work is going to be completed	Be at Front Desk or OBR during primetime	Prepares ReX, AR and NPR folders
	Desk is T. R. A. F.fed and ready for the day	Take Drs notes	Answers patient questions
	Behind the scenes work	Do Re-Xs	Insurance verification
	Preparing Drs ahead of time on finances for todays patients	NP exams	Auto payment entered
	Heads up to Front Desk for OTC collections	TIC on SWS	Help in scheduleing OV's of care plans