

Coordinator No coordinator

## Who does what?

<u></u>	US WHALL	
Download digital intakes	Summit-Edge	Summit-Edge
Verify insurance	Summit-Edge	Summit-Edge
Review intake for completeness (in Sum-Edge)	Coordinator	Provider
Secure auths	Provider	Provider
Day before		
Download digital appointments	Summit-Edge	Summit-Edge
Review appointments in Sum-Edge	Coordinator	Provider
Print Daysheet for Provider	Coordinator	Provider
Client arrives		
Collect copays	Coordinator	Provider
Adjust Daysheet to reflect actual session	Provider	Provider
Next day - Process sessions		
Synchronize Daysheets and Summit-Edge	Coordinator	Provider
Approves sessions for billing	Coordinator	Provider
Fills in missing billing information	Coordinator	Provider
File claims	Summit-Edge	Summit-Edge
Daily		
Download EOBs	Summit-Edge	Summit-Edge
Enter family payments	Coordinator	Bookkeeper
Enter EOB checks (not downloaded)	Coordinator	Bookkeeper
Prepare and balance bank deposit	Coordinator	Bookkeeper
Run EOB credit card vouchers	Coordinator	Bookkeeper
Balance credit card deposit	Coordinator	Bookkeeper
Fax misc EOBs and denials to Summit-Edge	Coordinator	Bookkeeper
Enter misc EOBs ino Summit-Edge	Summit-Edge	Summit-Edge
Weekly		
Review and adjust family stmts	Summit-Edge	Summit-Edge
Follow-up on family accounts	Coordinator	Bookkeeper
Mail statements to families	Coordinator	Bookkeeper
Handle family billing questions	Coordinator	Bookkeeper
Follow-up on unprocessed claims	Summit-Edge	Summit-Edge

## **Implementation**

Data-conversion	\$2.50 / client
Configure, setup and train	Free

## Fees for system & services

Practice support monthly fee	\$200 / practice	
Server access monthly fee	\$15 / user	
Fee per insured procedure	\$2.95	
Fee per self-pay procedure	\$0.50	
Download intakes and sessions	Free	
Practice management system	Free	
Clearinghouse services	Free	
Consultation	Free	
Statement mailing (Optional)	Postage + 39 ¢	