

# 3-STAGE BUSINESS TRAINING: WE BRING LEARNING TO YOU

## OUR PERSONALIZED APPROACH TO BUSINESS DEVELOPMENT

ClaimTek's business training program includes 3-stages of one-on-one mentoring that integrates seamlessly with our marketing program to ensure licensee success. Continuous training and consultation on *all areas* of medical billing and different specialties have proven to be the most effective way for newcomers to learn this industry and become true professionals in a matter of weeks. Our modern remote training minimizes expenses and provides our expert guidance when you need it most. We offer real-world experience that will give you confidence to deliver industry leading service, so you can drive referrals and build a profitable business!

### STAGE 1

During Stage 1, training is performed in private one-on-one sessions through an interactive online meeting. Each training session ranges from 1-2 hours. You will never be left alone to do it all yourself like basic online training courses. Your mentor will assign homework between sessions to ensure you fully grasp each topic. Depending on which ClaimTek program you choose, you can receive up to 28 hours of focused one-on-one medical billing training which, in reality, amounts to over 200 hours of training! Our "take you by the hand" approach is highly effective because we tailor it to you. The training is conducted with no interruptions or distractions from other people as so often happens in a large group training session. Your trainers will personally train you on software, billing, marketing, and

the business aspects of medical billing including information on how to setup your office for maximum efficiency and HIPAA compliancy. Personal trainers are available from 8:00 AM to 7:00 PM Pacific Standard Time including weekends. You'll be trained on our Effective Marketing strategy and how to use every marketing item that comes with your package. Your trainer will conduct role playing sessions with you to help you customize your messaging to fit your personal style.

Stages 2 and 3 below are referred to as the "***Business Consulting, Training, and Coaching***" (BCTC) package, designed to give you excellent "on-the-job" training and peace of mind as you grow your business.

## STAGE 2

ClaimTek refers to Stage 2 as "***Business Consulting & Personal Coaching.***" It includes pre-appointment training and post appointment consultation sessions. This stage will enhance your abilities to relay information and build your confidence while you conduct your marketing campaign. Whenever you have an upcoming appointment with a doctor, dentist, or any other medical specialty you simply contact ClaimTek prior to the appointment. We will prepare you for the meeting and help you learn about any specific billing rules that might apply for that specialty. You'll also learn about the types of questions to expect during your presentation and what questions you should be prepared to ask them to pinpoint any operational issues within the practice. The goal here is for you to have a professional interactive discussion with the doctor and office staff which, in turn, will raise your level of credibility and their interest in working with you. This stage also includes training on pricing strategies and contract proposals which is an important part of your initial meeting or follow-up appointment.

## STAGE 3

**“Refresher Training.”** Once you have secured a client, call your trainer to refresh your memory of the billing and software mechanics. In addition, your trainer will train you on the specific billing aspects for the type of medical specialty you signed up as a client. We’ll help the sign-up paperwork, assist in setting up your doctor’s database, and oversee the first transmission of claims to the clearinghouse.

### DON'T BE A SALESPERSON!

ClaimTek takes pride in our ability to train *anyone* to become a successful medical billing business owner. If you decide to get started with us, we guarantee that you'll be well-trained and well-positioned to take charge of your new business in the shortest time possible. We teach you to sell with science rather than gimmicks, so you present yourself professionally with factual financial analysis. You simply need to follow our blueprint for success by adding your consistent effort!

### SUMMARY OF BUSINESS TRAINING MANUAL CONTENTS

#### Setting Up Your Business and Getting Started...

- INTRODUCTION TO THE MEDICAL BILLING BUSINESS
- WHY MEDICAL BILLING?
- A NOTE ABOUT TERMINOLOGY
- SIZE OF THE MEDICAL BILLING MARKET
- THE BENEFITS OF A MEDICAL BILLING BUSINESS
- INCOME POTENTIAL
- FIRST STEPS - SETTING UP YOUR BUSINESS
- SETTING UP YOUR OFFICE
- MARKETING YOUR BUSINESS - OVERVIEW
- MARKETING STEP 1 - IDENTIFY THE SPECIFIC MARKET FOR YOU
- MARKETING STEP 2 - UNDERSTANDING MEDICAL OFFICES
- MARKETING STEP 3 - FIVE STRATEGIES TO GET AN APPOINTMENT WITH POTENTIAL CLIENTS

## **(CONT.) Setting up Your Business and Getting Started...**

- CHOOSING THE RIGHT MIX OF MARKETING STRATEGIES
- MAKING THE SALES PRESENTATION
- SIGNING THE CONTRACT
- PRICING YOUR MEDICAL BILLING SERVICES
- ANCILLARY SERVICES YOU CAN OFFER
- ONCE YOU HAVE SIGNED A CLIENT

## **Understanding Health Insurance...**

- INTRODUCTION TO THE HEALTH INSURANCE INDUSTRY
- THE BASICS OF HEALTH INSURANCE
- THE TYPES OF HEALTH INSURANCE
- HEALTH MAINTENANCE ORGANIZATIONS (HMO's)
- PREFERRED PROVIDER ORGANIZATIONS (PPO's)
- BLUE CROSS/BLUE SHIELD
- COORDINATION OF BENEFITS
- MEDICARE
- MEDIGAP SUPPLEMENTAL INSURANCE
- MEDICAID
- OTHER GOVERNMENT INSURANCE
- COBRA

## **Medical Coding and Fees...**

- MEDICAL BILLING TRAINING - CODING
- ICD-10 CODES
- THE CPT-4 CODES
- THE HCPCS PROCEDURE CODING SYSTEM
- HOW MEDICAL BILLING FEES ARE ESTABLISHED
- COST CONTROL AND REVIEW SYSTEMS
- DENTAL BILLING CODING AND FEES
- MEDICAL BILLING CODING EXERCISES

## **How to Process Medical Claims...**

- WHAT TO DO ONCE YOU HAVE CLIENTS
- SETTING UP THE DOCTOR'S ACCOUNT AT THE CLEARINGHOUSE
- SETTING UP THE DOCTOR'S DATABASE IN YOUR SOFTWARE
- GETTING THE DATA ON THE SUPERBILL
- FILING YOUR FIRST BATCH OF CLAIMS
- SETTING UP A REGULAR SCHEDULE TO FILE CLAIMS
- COMPLETING STANDARD DENTAL CLAIM FORMS
- FORMS TO MAKE SURE THE DOCTOR HAS ON FILE
- UNPROCESSABLE CLAIMS
- MONITORING CLAIMS FOR PAYMENT

## **Billing, Auditing, Collections, and Other Services...**

- FULL PRACTICE MANAGEMENT
- PREPARING PATIENT STATEMENTS
- HANDLING PHONE CALLS FROM PATIENTS
- HANDLING COLLECTIONS
- SPECIAL COLLECTION PROBLEMS
- USING A COLLECTION AGENCY
- FILING IN SMALL CLAIMS COURT
- DOING PREAUTHORIZATION AND PREDETERMINATION SERVICES
- THE MECHANICS OF HIPAA

## **Complete Directory of Medical Terms...**

- APPENDIX 1: MEDICAL SPECIALTIES
- APPENDIX 2: STATE DEPARTMENTS OF INSURANCE/ STATE INSURANCE COMMISSIONERS
- APPENDIX 3: STATE MEDICARE CARRIERS
- APPENDIX 4: STATE MEDICAID OFFICES
- APPENDIX 5: FEDERAL EMPLOYEES' COMPENSATION ACT DISTRICT OFFICES
- APPENDIX 6: ESSENTIAL REFERENCE MATERIALS
- APPENDIX 7: PLACE OF SERVICE (POS) CODES AND DEFINITIONS
- APPENDIX 8: CMS-1500 TYPE OF SERVICE (TOS) CODES
- APPENDIX 9: COMPARISON OF HOW TO FILE CLAIMS FOR COMMERCIAL INSURANCE VS. MEDICARE/MEDICAID
- APPENDIX 10: THE FIVE LAWS OF HIPAA
- APPENDIX 11: FREQUENTLY ASKED QUESTIONS ABOUT HIPAA