

Denial prevention

Evaluation worksheet

Illustrative evaluation only. This is a synthetic workflow test plan. It is not a product screenshot, a verified QuickIntell demonstration, a payer requirement, or a customer outcome. The steps below describe evidence to request from a proposed vendor configuration.

Evaluate how software identifies a claim issue before submission, supports a reviewer decision, and records the approved release or hold.

Evaluation record

Organization and environment:

Workflow/payer/service cohort:

Vendor and product/configuration:

Evaluator and date:

Operational owner: Claims supervisor; coding or clinical reviewer for documentation judgments

Approved data source and test environment:

Destination system and verifying owner:

Use synthetic data unless the organization has explicitly approved a suitable test dataset and handling process. Do not put patient or claim data into an unapproved public form, URL, or analytics event.

Synthetic input

Synthetic claim DEMO-CLAIM-001, a matching synthetic encounter, a supporting-document reference, and one deliberately missing required field. The evaluator supplies the applicable rule for the exercise; this worksheet is not payer policy or coding guidance.

Walk through the intended workflow

- 1

Receive and match. Match the claim to the intended encounter and identify missing or stale inputs.
-
- 2

Explain the finding. Show the affected field, source reference, applicable rule, and unresolved uncertainty.
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- 3

Review and decide. A permitted reviewer corrects the input, dismisses the finding with a reason, or keeps the item on hold.
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- 4

Release approved work. Execute only the action within the approved scope and show the submitted version.
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- 5

Confirm the destination. Inspect the clearinghouse or destination acknowledgment; keep acceptance separate from adjudication.
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- 6

Reconcile and learn. Record the final status, correction, approver, and any later denial without overwriting history.
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Completion and evidence

The approved claim version is traceable to the reviewer decision and its destination acknowledgment. A clean check or submission acceptance alone is not evidence of payment.

Request an export or inspectable record containing source reference, record match, proposed action, uncertainty, reviewer decision, executed version, timestamp, acknowledgment, and final disposition. Where an item remains unresolved, record its owner and next action. The destination owner should verify the result independently of the vendor dashboard.

Evidence location / destination verifier

Exception tests

Run each case in the approved test environment. Record what happened, its evidence reference, and any unresolved owner. A proposed behavior is not a passed test.

Test	Required observation	Result / evidence reference
Missing information	The missing field remains visible; the reviewer must resolve it or make an explicit permitted disposition before release.	
Conflicting source	Conflicting documentation is shown with its source and timestamp; the workflow does not silently select a convenient answer.	
False-positive finding	Reviewer dismisses a finding with a recorded reason; the final claim version and approval remain inspectable.	
Duplicate input	Replay cannot create an unnoticed duplicate submission; the original item and current state remain traceable.	
Unavailable destination	The item has a visible pending/failed state, an assigned owner, and the documented retry or manual procedure.	

Follow-up owner, next action, and evidence notes

Measures and acceptance criteria

Eligible claims; confirmed findings by reason; dismissed findings; review/rework minutes; submission acknowledgments; and initial denials in an equally mature, defined adjudicated cohort. Document whether partial denials are measured by claim or claim line.

Record your baseline period, pilot period, cohort inclusion/exclusion rules, agreed quality threshold, acceptable review burden, and outcome observation window before running the pilot. The worksheet supplies no universal target or expected improvement. Compare equivalent cohorts and preserve the time spent on exceptions and corrections.

- ☐ Inputs match the intended records; missing information stays visible.
- ☐ Recommendations can be traced to the supporting source.
- ☐ Human approval and permission boundaries have been demonstrated.
- ☐ Routine and exception cases have recorded evidence.
- ☐ Destination results reconcile to approved actions.
- ☐ Failure recovery and manual fallback have an accountable owner.
- ☐ Metrics include denominators, exclusions, review time, and limitations.
- ☐ Acceptance decision: approve limited pilot / correct and retest / stop.

Decision owner, date, conditions, and unresolved items:

Next step

Review the [denial prevention offering](#) and the [AI RCM vendor checklist](#). Bring this completed worksheet to a [scoped workflow demo](#).

<https://quickintell.com/products/ai-rcm/denial-prevention>

<https://quickintell.com/ai-revenue-cycle-management/vendor-evaluation-checklist>

<https://quickintell.com/company/contact>