Denial recovery

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 the transition from a payer response to an evidence-supported next action, tracked submission, and reconciled final disposition.

Evaluation record

Organization and environment:

Workflow/payer/service cohort:

Vendor and product/configuration:

Evaluator and date:

Operational owner: Denials manager; authorized financial or clinical approver as required

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 denied claim DEMO-DENIAL-001, a synthetic payer response, a claim history, and a supporting-document reference. The evaluator provides the applicable next-step instructions and deadline for the exercise; no universal appeal deadline is assumed.

Walk through the intended workflow

1. **Read the response.** Match the payer response to the correct claim and preserve its reason and source.
2. **Investigate the next action.** Distinguish correction, documentation request, appeal, follow-up, and proposed disposition.
3. **Prepare the evidence.** Show supporting records, missing evidence, the applicable deadline, and any drafted material.
4. **Approve and submit.** An authorized person reviews the action; preserve the version actually sent and its submission receipt.
5. **Track the outcome.** Keep pending, rejected, partially resolved, and completed states separate with a next owner.
6. **Reconcile the resolution.** Confirm payment or approved disposition in the financial record and preserve the complete history.

Completion and evidence

A drafted appeal is not recovered cash. An item is financially resolved only when the actual payment or approved disposition is reconciled to the relevant account, with remaining balances explained.

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
Incomplete support	A draft with missing evidence is marked incomplete and routed to the accountable owner; it is not treated as a submitted appeal.	
Wrong action type	A reviewer can choose a correction or other appropriate next action instead of an appeal and record why.	
Deadline uncertainty	The applicable source is requested and uncertainty is surfaced; the software does not invent a filing window.	
Partial recovery	The paid amount and remaining balance are reconciled separately; the whole claim is not counted as fully recovered.	
Submission failure or duplicate	Failure stays visible; replay and retries do not create unnoticed duplicate actions; the receipt identifies what was sent.	

Follow-up owner, next action, and evidence notes

Measures and acceptance criteria

Worked claims; reviewer and follow-up minutes; action type; submitted actions with receipts; pending age; reconciled payments; remaining balances; and approved non-recovery dispositions. Report recovery rates with a defined worked cohort and sufficient outcome maturity.

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 recovery offering and the AI RCM vendor checklist. Bring this completed worksheet to a scoped workflow demo.

https://quickintell.com/products/denial-management

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

https://quickintell.com/company/contact