

Prior authorization

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 requirement verification, packet completeness, submission tracking, and the handoff from a recorded payer decision to the operational team.

Evaluation record

Organization and environment:

Workflow/payer/service cohort:

Vendor and product/configuration:

Evaluator and date:

Operational owner: Authorization lead; clinician for clinical support and authorized reviewer for release

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 order DEMO-AUTH-001, encounter and coverage records, one supporting clinical document, and a supplied requirement record. Include a deliberately missing attachment. The requirement is a test input, not a statement about any real plan or service.

Walk through the intended workflow

- 1

Match the request. Match order, encounter, service, and coverage information; surface discrepancies.
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- 2

Verify the requirement. Show the relevant requirement source, date, applicability, and unresolved questions.
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- 3

Assemble the packet. Link supporting material and identify missing clinical or administrative information.
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- 4

Review and submit. A permitted person approves the request; preserve the sent packet and submission acknowledgment.
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- 5

Track the decision. Keep submitted, pending, additional-information, approved, and denied states distinct.
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- 6

Confirm the handoff. Record the decision details and operational owner; flag changed inputs or a mismatch before downstream use.
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Completion and evidence

A submitted request is not a payer approval. A recorded approval is not a guarantee of payment. The receiving team must verify that the decision applies to the intended service and circumstances.

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 attachment	The missing item is visible with an owner; packet preparation is not represented as a completed submission.	
Changed coverage or service	The original decision is not silently reused; the discrepancy triggers a new review against applicable requirements.	
Unclear requirement	The workflow records uncertainty and the next verification action instead of asserting authorization is unnecessary.	
Payer requests information	The new request is linked to the case, assigned, tracked, and acknowledged when answered.	
Unavailable channel or duplicate	The software exposes the failure and fallback; retries preserve a unique request trail and do not silently resubmit.	

Follow-up owner, next action, and evidence notes

Measures and acceptance criteria

Eligible requests; packet preparation/review minutes; incomplete packets; submission receipts; additional-information requests; pending age; and decision/handoff completion. Separate internal processing time from payer decision time.

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

<https://quickintell.com/products/quickauth>

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

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