DaisyBill

Success Trainings

HELPING YOU GET THE MOST FROM YOUR DAISYBILL ACCOUNT

DaisyBill provides four Success Trainings and two Check-In calls for you and your staff. These range from essential basics in workers' compensation billing to advanced DaisyBill reporting functionality. Plus, for California Billing Provider, we offer an optional tutorial dedicated to Requests for Authorization.

Our goal: An easy transition to DaisyBill.

Please feel free to ask us about the Success Training process or the sessions listed below.

Training Session	Topics Covered	Scheduled	Length	Who Should View?	What to Bring?
Account Setup Interview	Kick-off call to determine your organization's requirements.	Prior to Success Training #1	20-30 minutes	Organization administrator(s)	Completed spreadsheet of your organization's billing information. Implementation Tracker spreadsheet. Questions!
Success Training #1: Organization Admin Overview	Review your account set up for accuracy and learn how to customize DaisyBill to your practice.	As soon as your Organization Admin is ready!	30-45 minutes	• Organization administrator(s)	Nothing but questions!
Success Training #2: DaisyBill Essential Basics + Bill Submission	Master the DaisyBill navigation bar and learn how to create new patients and injuries and submit bills.	No need! They're videos! Watch on your schedule, prior to your Check-In Call!!	Multiple videos - 60 minutes total	• Organization administrator(s) • Anyone working in DaisyBill • Bill entry staff	Nothing, play, pause and rewind as you need!
DaisyBill Check-In Call #1	Your questions!	1-2 days after Success Training #2	30 minutes	• Organization administrator(s) • Any staff with questions	Examples of your questions! Make sure you've entered at least a few patients injuries and bills!
Success Training #3: Bill Payments and Review	The fun stuff – everything you need to know about bill payment and EOR posting in DaisyBill.	2 - 3 weeks after you begin submitting bills.	60-90 minutes	• Organization administrator(s) • Bill posting staff • Payment review staff • SBR / collections staff	All received Explanations of Review (EORs) scanned in PDF format.
Success Training #4: Reporting	Learn how to create and use custom reports to get the most out of DaisyBill. Learn how the No Response task helps with follow-up.	No need! They're videos! Watch on your schedule, prior to your Check-In Call!!	Two videos - 32 minutes total	• Organization administrator(s) • Any staff who runs reports • Any staff who does follow-up	Nothing, play, pause and rewind as you need!
DaisyBill Check-In Call #2	Your questions!	4-7 days after Success Training #4	30 minutes	• Organization administrator(s) • Any staff with questions	Examples of your questions!
Bonus Success Training: Requests for Authorization (RFA)	How to create, submit, and manage Requests for Authorization.	No need! It's a video! Watch on your schedule!	25 Minutes	• Organization administrator(s) • RFA Staff	Nothing, play, pause and rewind as you need!