

How everything connects

Start at Program & walkthrough to choose a planted example. Home and Record auditor open the same overview. The System is daily record work, Agent is procedural cases and correspondence, and Education is the Resource hub.

THE DAILY ROUTE

1 Overview

Find the exception

2 Client record

Inspect source evidence

3 Assigned work

Identify the owner

4 Note Review

Review the exact version

5 Billing + replies

Match the separate facts

6 Brief + run log

Explain what changed

NOTE REVIEW: WHAT EACH STAGE MEANS

Ready — Configured readiness checks passed for this supplied version.

Approved — Local QA decision recorded. This is separate from a clinical signature.

Posted — A person attested that the note was posted in the EHR.

Reconciled — A later supplied export matched the reviewed version.

Returned — Work was sent back for review through the normal gates.

Changed version — The prior approval does not apply to the current version.

KEEP THESE DISTINCTIONS

A skipped check is not a pass. A receipt is not a repaired finding. Acknowledgement, dispute or waiver does not prove resolution. Resolution needs a later fully executed passing check. Late-entry eligibility still requires review; it does not automatically make a note billable.

Where to find each feature

Program & walkthrough /demo	Client and staff directories; scenario starting points
Record auditor / Home /auditor	Program counts, exceptions and client list
Client record /client/C-0002	Clocks, findings, units, reviews, documents and billing
Note Review /note-review	Exact-version readiness and review stages
Work by position /audit-work	Who owns each finding and when it is due
Local outbox /audit-outbox	Reminder/escalation records and suppression reasons
Weekly brief /audit-scorecard	Recorded measures for director review
Run log /audit-runs	Audit runs, executed checks and finding history
Settings /audit-settings	Staff routing, house SLAs, questions and payer profiles
Import /audit-import	Validate a synthetic export preview before applying it
Ask Mindful /ask	Ask a local, deterministic question about a client
Intake /intake	Start a procedural notice and evaluate its inputs
Countdown /countdown	Due dates anchored to episodes and events
Chart check /chartqa	Focused deterministic chart QA exceptions
Review queue /queue	Blocked and ready procedural packet drafts
Audit room /audit	Audit-defense cases and program clocks
Send desk /send	Signed packets; record a manual filing attestation
Inbox /inbox	Locally catalog payer/provider replies and follow-up
Team /team	Locally record tool-specific coordination lines
Outcomes /outcomes	Filed-case results: won, partial, lost or pending
Levels of care /levels	Fifteen levels and explicit rule-coverage boundaries
Connections /connections	Vendor evidence, mapping and actual adapter status
Education /resource/	Briefings, library, clocks and touchpoint map
Video & quick guide /learn/	Search chapters, inspect screenshots, download files

Practice with the examples

Maya Brooks · C-0002

Connected record, missing-note clock, reconciled review, payer and team lines.

Avery Lane · C-0020

Ready and posted note examples, matched claims and paid remittances.

Sofia Grant · C-0004

Claim without a ready approved note, changed review version, unworked denial.

Sam Rivera · C-0021

Approved note awaiting the separate EHR step; worked denial history.

Riley Shaw · C-0009

OTP data is visible while qualified rules remain unloaded and unassessed.

Owen Park · C-0013 / Amara Wells · C-0012

Ready procedural case / signed packet waiting for a person to record filing.

TERMS YOU WILL SEE

Finding — A rule-linked exception about a specific supplied record or service.

Evidence — The supplied source or data that supports a check, decision or gap.

Authorization — Permission for a date range, service/level, code and unit basis.

Remittance — The supplied payer decision tied to a claim; separate from note approval.

Routing gap — Missing or inactive staffing information needed to assign responsibility.

Procedural packet — A case draft with evidence, citations, consent and reviewer-role gates.

USING THIS DEMONSTRATION

Use the video chapter menu to jump directly to a feature. The review-stage screenshots show different notes. Read the on-screen connection status: these pages record local actions and attestations, with no live EHR, mailbox, team posting or payer transmission. The education hub includes older material; confirm current operational source evidence before relying on a rule or deadline.