



Accounts Receivable Orientation

Employee Name: _____

A. General Orientation was completed on: _____

B. Job Specific Orientation below.

Criteria	Information Source	Employee Signature	Instructor Signature	Date
1.) How to maintain manual census daily, weekly, monthly, and yearly.	CFO, Director of Finance, Forms			
2.) Understanding of Financial Components of Admission process.	CFO, Director of Finance, Forms, Accounts Receivable Policy and Procedure Manual			
3.) How to process Accounts Receivable deposits.	CFO, Director of Finance			
4.) Administration of Resident Trust Funds.	CFO, Director of Finance, Forms, Accounts Receivable Policy and Procedure Manual, American Health Tech Software			
5.) Understanding of computerized accounts receivable system.	CFO, Director of Finance, Forms, Accounts Receivable Policy and Procedure Manual			
6.) Understanding of Medicaid admission and discharges, Medicaid application, and billing processes.	CFO Director of Finance Medicaid Provider Manual			
7.) Understanding of Medicare program, admissions and discharges, coverage, billing and collections. Demand billing and triple check.	CFO, Director of Finance, Accounts Receivable Policy and Procedure Manual, Intermediary Manuals			
8.) Understanding of Private Pay and other insurance billings.	CFO, Director of Finance, Accounts Receivable Policy and Procedure Manual			

Criteria	Information Source	Employee Signature	Instructor Signature	Date
9.) Billing and Collections monthly processes. Cash Goals.	CFO, Director of Finance, Accounts Receivable Policy and Procedure Manual			
10.) Month End processing, including cash reconciliation, tie-outs, ancillaries and data entry.	CFO, Director of Finance, Accounts Receivable Policy and Procedure Manual			
11.) Understanding of Medicare Part D enrollment and selection. Collaborative training and shared responsibility with Medication Coordinator and Pharmacy.	CFO, Director of Finance, Pharmacy			
12.) Maintenance of Resident Financial files.	CFO, Director of Finance, Accounts Receivable Policy and Procedure Manual			
13.) How to process resident refunds from accounts receivable, trust fund, and Unclaimed Properties.	CFO, Director of Finance, Accounts Receivable Policy and Procedure Manual, Regulations			
14.) Understanding of processes involved in adjusting and writing off A/R accounts.	CFO, Director of Finance, Forms, Accounts Receivable Policy and Procedure Manual			
15.) How to assist residents and sponsors with billing, payment and collection process.	CFO, Director of Finance, Forms, Accounts Receivable Policy and Procedure Manual			
16.) How to interpret monthly financial statements for revenue.	CFO Director of Finance			
17.) Understanding of month end accounts receivable reports.	CFO, Director of Finance, American Health Tech Software			
18.) Understanding Medical Records Review for Health Maintenance Organization (HMO) and Recoupment (Initializing, tracking, and coordinating with other departments)	Director of Finance Accounts Receivable			

Criteria	Information Source	Employee Signature	Instructor Signature	Date
19.) Understanding the process for SNF Advanced Beneficiary Notice (SNF ABN) and SNF Advance Beneficiary Notice of Non-Coverage (SNF NOMNC)	CFO, Director of Finance, Policy and Procedure Manual, CMS			
20.) Job Description	Human Resources			