



Vyne Trellis Essentials: How to Track and Manage Claims

Version 1.3

Revision Date 2/13/24



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Vyne Trellis Essentials: How to track and manage Claims

Virtual Instructor-led Training Outline

Course Overview: How to track and manage Claims

This course builds your foundational knowledge and guides you using Vyne Trellis to streamline your claims workflow, verify insurance eligibility, and confidently navigate key documents.

Getting Started: Recommended Pre-Requisites

Vyne Trellis Core: Complete the Core online learning modules on the [Vyne Trellis Training](#) page

PMS Plug-In Installation: Install the Practice Management Software (PMS) plug-in. **Vyne Sync**

Setup: Configure and sync Vyne Trellis with your PMS system.

Claim Submission: Complete the process in your PMS to send claims to Vyne Trellis.

Learning Outcomes

After completing this virtual instructor-led class, learners will be able to

1. **Determine Patient Insurance Eligibility:** Verify patient insurance coverage and benefits to reduce claim denials and promote clear financial communication with patients.
2. **Identify Causes of Failed Unsent Claims:** Diagnose and resolve common reasons for failed unsent claims.
3. **Respond to Carrier Feedback on Rejected Claims:** Apply best practices to review the Explanation of Benefits (EOBs) and correct rejected claims efficiently.
4. **Navigate Claims Enrollment Forms:** Understand how to access and complete enrollment forms to support efficient claim processing.



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