



# TRAINING PULSE

Information Architecture · User Flows · Task Flows · JTBD Framework

Ascent Healthcare | RCM Division

**4**

Training Phases

**27**

Use Cases

**9**

Actors / Roles

**2**

Approval Levels

*RCM → CST → LAW → OJT*

# What this document covers

01

## Information Architecture

6 modules · 17 screens · full IA map

02

## User & Task Flows

4-phase lifecycle · decision gates · approval flows

03

## JTBD Framework

7 actors · job statements · pain points · opportunities

04

## Actor & Role Matrix

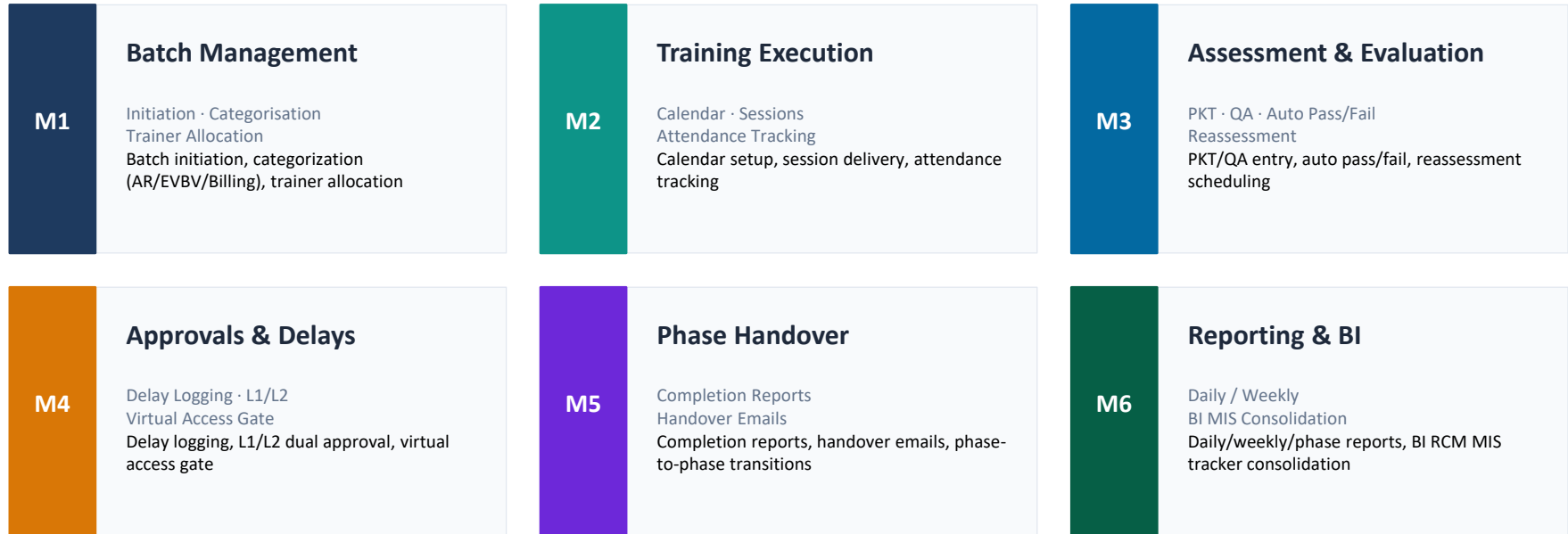
RACI · approval authority · reporting frequency

05

## Business Rules

Thresholds · phase gates · durations · reporting

# 6 Core Modules — Application Structure



# Screen & View Inventory — 17 Screens

Screen / View	Primary Actor	Module	Use Cases
Dashboard Home	All roles	All	Batches, alerts, approval queue
Batch Initiation Form	HR Executive / HRBP	M1	RCM-01, RCM-02
Trainer Allocation Screen	Training Mgr / AD Training	M1	RCM-03
Training Calendar	Trainer	M2	RCM-04
Session Log	Trainer / Team Coach	M2	RCM-05, CST-02, LAW-02
Attendance Register	Trainer	M2	RCM-06
PKT / Assessment Entry	Trainer	M3	RCM-07, CST-03, CST-04
Score Evaluation View	System (auto)	M3	RCM-08, CST-05
Reassessment Scheduler	Trainer	M3	RCM-09, CST-05, LAW-03
Delay Log & Approval Queue	Trainer / Mgr / AD Training	M4	RCM-11, CST-07, LAW-06
Escalation Tracker	Trainer / HR	M4	RCM-12
Phase Completion Report	Trainer / Team Coach	M5	RCM-13, CST-06, CST-08, LAW-07
Virtual Access Request	Trainer / Ops Director	M4	RCM-10
Weekly Report Submission	Team Coach / Trainer	M6	LAW-04
Toll Gate Evaluation	Trainer	M3	LAW-03
BI Tracker / MIS Report View	BI RCM MIS / Training Mgr	M6	All phases

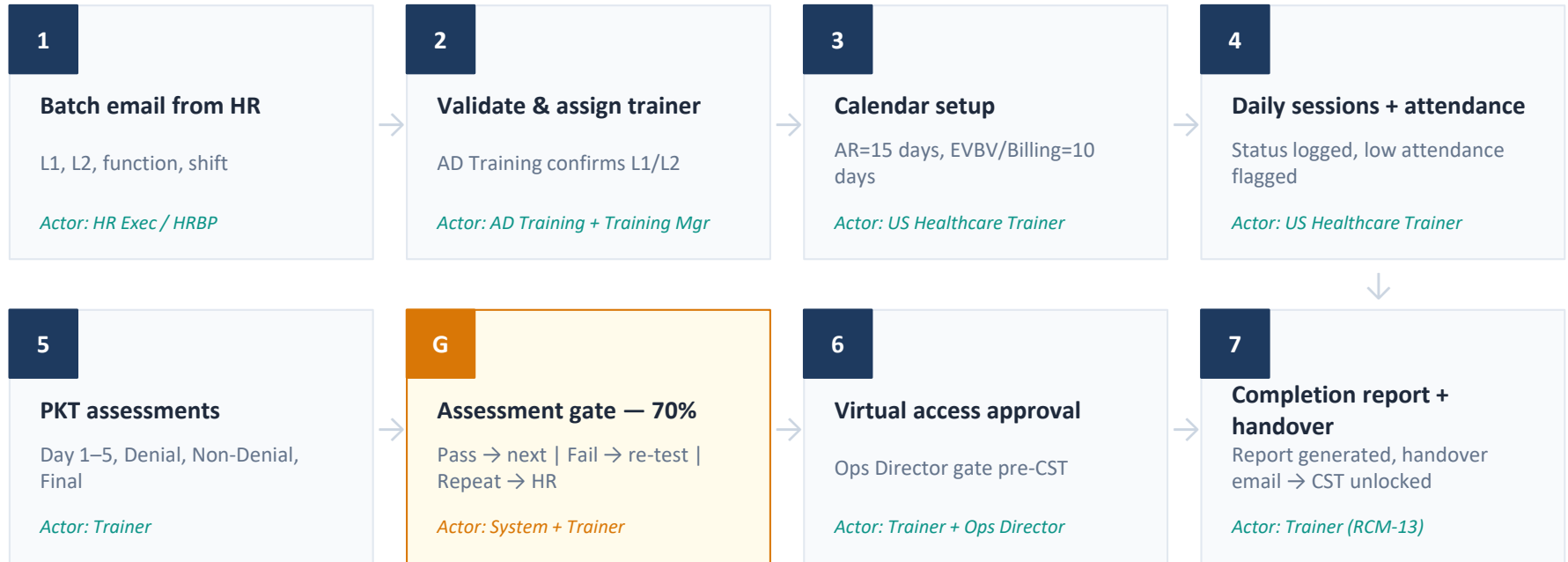
# Training Lifecycle — 4-Phase Journey



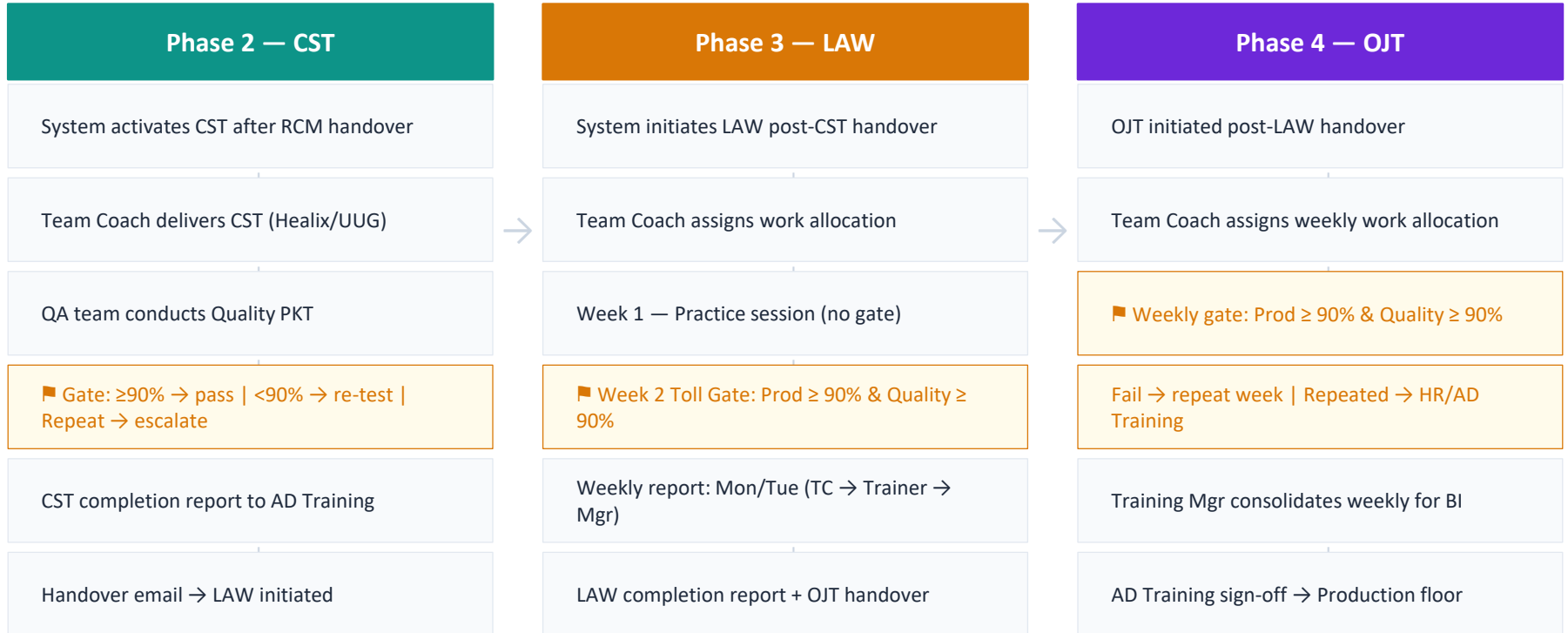
All phase transitions require a Completion Report + Handover Email. Missing either blocks the next phase.

# RCM Phase — Step by Step

Classroom · Theoretical · PKT ≥ 70% threshold

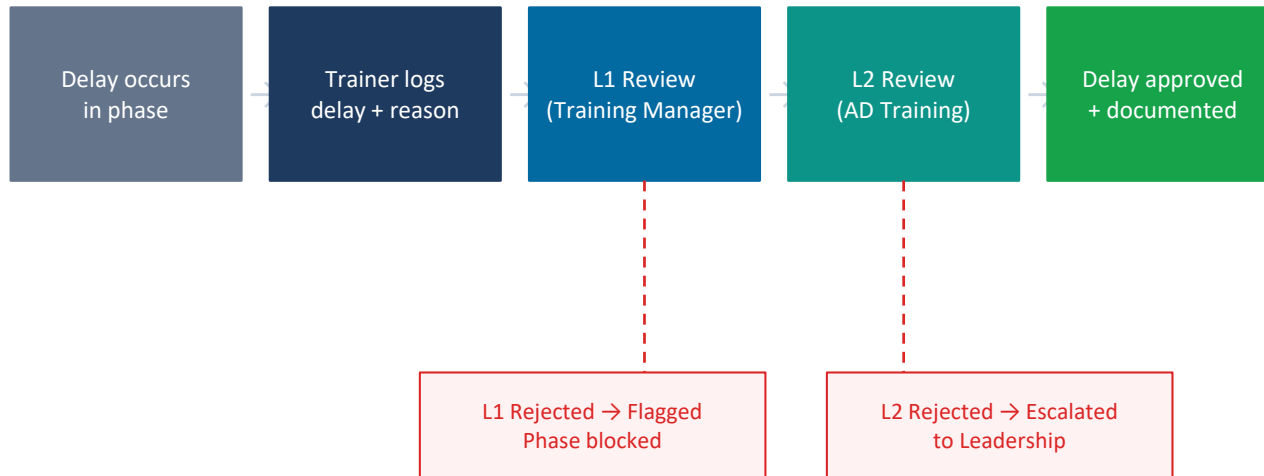


# CST, LAW & OJT Phase Summaries



# Delay Logging & Dual Approval Flow

Applies universally across all four phases



**Business Rules**

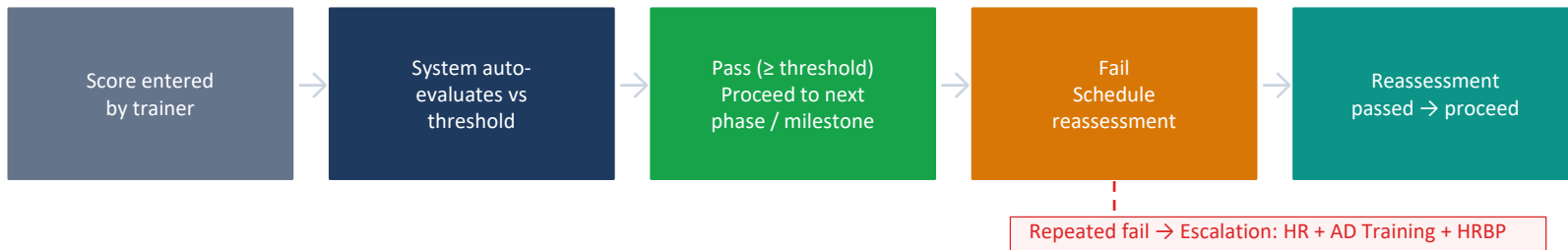
- Dual approval mandatory for every delay
- No approval = phase is flagged & blocked
- Full audit trail required in system
- Applies to all 4 phases (RCM, CST, LAW, OJT)

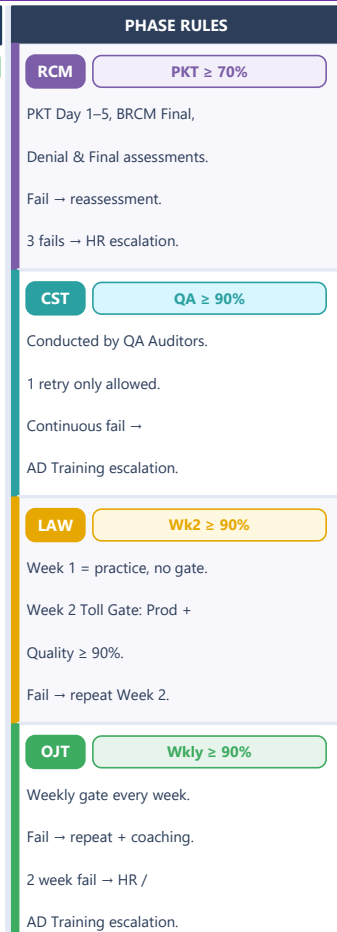
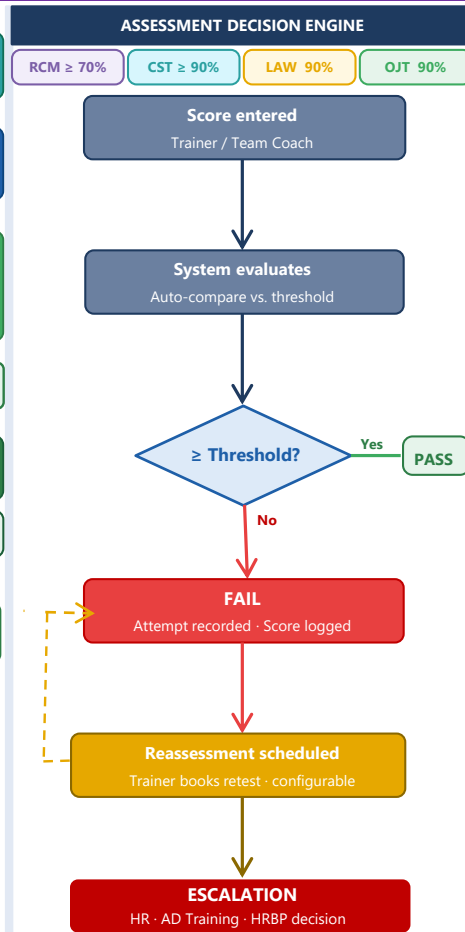
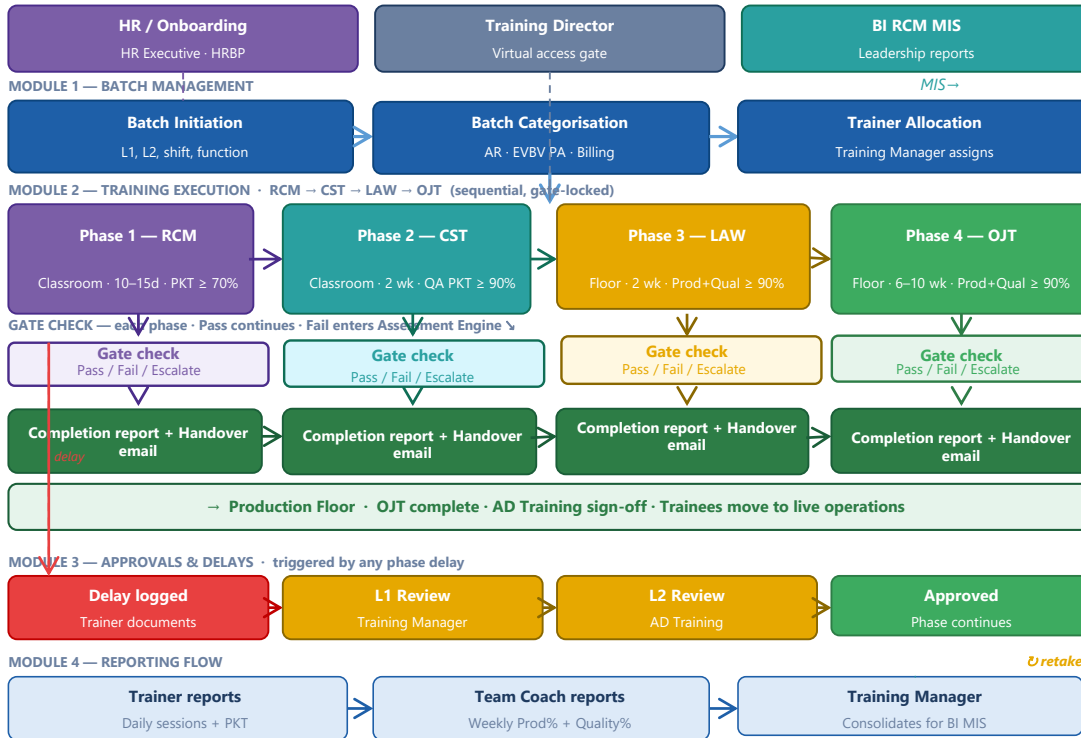
# Assessment Decision Logic

Consistent across all phases — thresholds differ by phase

Phase	Assessment Type	Threshold	On Failure
RCM	PKT (Process Knowledge Test)	≥ 70%	Reassessment → Repeated fail → HR escalation
CST	Quality PKT	≥ 90%	Reassessment (limited) → Escalation
LAW Wk1	Practice — no gate	—	Week 2 is the toll gate
LAW Wk2	Prod% + Quality%	≥ 90% both	Repeat Week 2 → HRBP escalation
OJT (weekly)	Prod% + Quality%	≥ 90% both	Repeat week → HR / AD Training

## Decision Flow





# Jobs to Be Done — 7 Actors

## HR / Onboarding

Job: Communicate batch details in one action → training starts on time

Pain: Email-based, no template, info lost

## Training Manager (L1)

Job: Allocate trainers + monitor progress → clear milestones within SLA

Pain: Fragmented BaTC + BI trackers, manual

## Team Coach (TC)

Job: Submit daily + weekly reports easily → Trainer always has real-time data

Pain: Manual email reports, no template, late data

## Trainee / Associate

Job: Know phase + score + threshold → focus effort, avoid gate surprises

Pain: Outcomes communicated informally only

## AD Training (L2)

Job: Review & approve delays with full context → maintain quality without bottleneck

Pain: Approvals over email, no audit trail

## US Healthcare Trainer

Job: All daily data entry in one screen → focus on training not spreadsheets

Pain: 3+ systems updated per day, duplication

## BI RCM MIS Team

Job: Query-ready data from system → accurate MIS without manual collection

Pain: Fully dependent on Training Mgr to forward

# 3 High-Impact Opportunity Areas

01

**High Friction**

## Manual Data Entry

Trainers update BaTC tracker, BI tracker, and email separately every day. Three systems, same data, high risk of inconsistency. Training Plus must be the single source of truth for all data entry.

**Recommended solution**

Single unified data entry screen per role. Auto-push to downstream systems.

02

**Process Gap**

## Approval Lag

L1 + L2 delay approvals happen over email and phone. No SLA, no audit trail, no escalation timer. Approvers have no context without reading email threads.

**Recommended solution**

In-app approval queue with context panel, SLA timer, and notification system.

03

**Reporting Risk**

## BI Report Dependency

BI RCM MIS depends entirely on Training Manager to consolidate and forward data weekly. Any delay or error in manual consolidation directly affects leadership report accuracy.

**Recommended solution**

Auto-populate BI queries from Training Plus. Eliminate manual consolidation step.

# RACI Matrix — Key Activities

*R = Responsible · A = Accountable · C = Consulted · I = Informed*






Activity	HR/Onboard	AD Train (L2)	Train Mgr (L1)	Trainer	Team Coach	BI MIS
Batch initiation	R	I	I	I	-	-
Trainer allocation	-	A	R	I	-	-
Calendar setup	-	I	C	R/A	-	-
Session delivery (RCM)	-	-	I	R/A	-	-
Session delivery (CST)	-	I	C	C	R	-
Attendance tracking	-	-	-	R/A	C	-
Assessment entry	-	-	-	R/A	C	-
Delay approval (L1)	-	-	R/A	I	-	-
Delay approval (L2)	-	R/A	I	I	-	-
Weekly report (LAW/OJT)	-	I	A	C	R	-
Phase handover	-	A	I	R	C	-
BI MIS report	-	I	R	-	-	A

# Thresholds, Gates & Reporting Obligations

## Phase Duration by Function

Function	RCM	CST	LAW	OJT
AR	15 days	2 wks	2 wks	6–10 wks
EVBV PA	10 days	2 wks	2 wks	6–10 wks
Billing	10 days	2 wks	2 wks	6–10 wks

## Mandatory Phase Gates

-  CST blocked until: RCM completion report + handover email received (RCM-13)
-  CST also requires: Ops Director virtual access approval (RCM-10)
-  LAW blocked until: CST completion report + handover email received (CST-08)
-  OJT blocked until: LAW completion report + handover email received (LAW-07)
-  All phases: every delay requires dual L1 + L2 approval before proceeding

## Assessment Types by Function

<b>US Healthcare (all)</b>	RCM Day 1–5 · BRCM Final · Re-Assessment
<b>AR specific</b>	Non-Denials · Denial · RCM Final (each + Re-Assess)
<b>Billing specific</b>	Billing Final Assessment + Re-Assessment
<b>EVBV PA specific</b>	EVBV Final Assessment + Re-Assessment
<b>CST (Team Coach)</b>	Quality Assessment + Re-Assessment
<b>LAW / OJT</b>	Weekly Prod% + Quality% (toll gate / weekly)

## Summary

# Training Pulse — Design Foundation

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**6 modules** — covering all 27 use cases and 17 screens

**4 sequential phases** — RCM → CST → LAW → OJT with hard phase gates

**9 actor roles** — from HR Onboarding to BI RCM MIS, each with defined RACI

**7 JTBD statements** — mapping jobs, outcomes and current pain points

**3 key opportunities** — data entry, approval lag, and BI report dependency

# Training & RCM Coding Platforms

## Mid-Fidelity Wireframes · Software Application Design


Ascent Healthcare · RCM Division · Training & Coding Platforms


- 01 Dashboard — Training Manager
- 02 Batch Management List
- 03 New Batch Initiation Form
- 04 Trainer Allocation
- 05 Training Calendar & Session Log
- 06 Attendance Register
- 07 PKT Assessment Entry


- 08 Score Evaluation & Status
- 09 Delay Log & Approval Queue
- 10 Phase Handover & Completion
- 11 Escalation Tracker
- 12 Weekly Report Submission
- 13 BI MIS Reports Dashboard
- 14 RCM Coding Form


### Design system


Font: Segoe UI


 Primary #5B3FA6


 Accent #9B7DC4


 Surface #F4F3F8

 Success #2E9E6B

 Warning #C47B00

 Danger #C0392B

 Handover #0F7B6C

 Navy #3D1D6E



# Design System

Color Palette & Token Reference

---

**Font:** Segoe UI

**Primary** #8C64BD

*Warm purple · Accessible · Systematic*

# Primary Color Family

All shades derived from #8C64BD

#4E2C7A

## Primary Darker

*Deep elements*

--color-primary-darker

#6A3FA0

## Primary Dark

*Nav / headers*

--color-primary-dark

#8C64BD

## Primary

*Main brand*

--color-primary

#B89FD8

## Primary Light

*Accent badges*

--color-primary-light

#E8DFF5

## Primary Lighter

*Card fills*

--color-primary-lighter

#F5F1FB

## Surface

*Table rows*

--color-surface

# Semantic Color Tokens

*Status, feedback, and functional colors*



## Success

*Positive actions & states*

#2E9E6B · --color-success



## Warning

*Caution & pending states*

#C47B00 · --color-warning



## Danger

*Errors & destructive actions*

#C0392B · --color-danger



## Handover

*Transfer & handoff states*

#0F7B6C · --color-handover



## Navy

*Deep brand backgrounds*

#3D1D6E · --color-navy

# Design System












Color Token Reference

Font

Segoe UI

#8C64BD

Primary

	<b>Primary</b>	#8C64BD	Main brand purple
	<b>Primary Dark</b>	#6A3FA0	Nav / headers
	<b>Primary Darker</b>	#4E2C7A	Deep elements
	<b>Primary Light</b>	#B89FD8	Accent badges
	<b>Primary Lighter</b>	#E8DFF5	Card fills
	<b>Surface</b>	#F5F1FB	Table rows
	<b>Success</b>	#2E9E6B	Positive / green
	<b>Warning</b>	#C47B00	Caution / amber
	<b>Danger</b>	#C0392B	Error / red
	<b>Handover</b>	#0F7B6C	Transfer / teal
	<b>Navy</b>	#3D1D6E	Deep brand bg

# Usage & Contrast Examples

How to apply the palette in UI components

## Buttons



## Status Badges



## Contrast Pairs



#8C64BD / #FFFFFF  
Typography · Segoe UI

#4E2C7A / #FFFFFF

#E8DFF5 / #4E2C7A

#F5F1FB / #6A3FA0

#2E9E6B / #FFFFFF

#2A1A45 / #B89FD8

H1 – 44pt

H2 – 28pt

Body 14pt

Caption

Heading One

Heading Two

Body text paragraph

Caption / muted



# Training Pulse

## Mid-Fidelity Wireframes · Software Application Design

Ascent Healthcare · RCM Division · Training Platform

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Dashboard

Batch Management

Onboard Trainee

Training Calendar

Assessments

Approvals & Delays

Phase Handover

Escalations

Reports

**6**  
Active Batches

RCM: 2  
CST/LAW/OJT: 4

**87**  
Total Trainees

On track: 71  
At risk: 16

**12**  
Pending Approvals

L1: 7  
L2: 5

**3**  
Escalations Open

HR: 2  
AD Train: 1

**94%**  
Avg Pass Rate

PKT: 91%  
QA/Prod: 97%

**4**  
Handovers Due

RCM→CST: 2  
CST→LAW: 2

Active training pipeline



Active batches

Batch ID	Function	Phase	Trainer	Start	Trainees	Pass %	Status
BT-031	AR	RCM	Priya Nair	10 Apr	18	72%	In Progress
BT-032	EVBV PA	CST	Kiran Sharma	02 Apr	14	91%	On Track
BT-029	Billing	LAW	Ravi Kumar	18 Mar	22	88%	Toll Gate
BT-030	AR	LAW	Anitha Raj	20 Mar	19	93%	On Track
BT-027	EVBV PA	OJT	Suresh M.	05 Mar	11	96%	On Track
BT-028	Billing	OJT	Deepa V.	07 Mar	16	79%	At Risk

Showing 1–6 of 24 entries

Alerts & actions

- Delay** BT-031 — RCM delayed, L1 approval pending
- Fail** BT-028 — OJT Prod% below threshold (79%)
- Handover** BT-027 — OJT completion report due today
- Report** Weekly report missing — BT-032 Team Coach
- Gate** BT-029 — LAW toll gate evaluation pending



Dashboard

Batch Management

Onboard Trainee

Training Calendar

Assessments

Approvals & Delays

Phase Handover

Escalations

Reports

Function: AR / EVBV / Billing | 
 Phase: All phases | 
 Status: All statuses | 
 From: 01 Apr 2026 | 
 To: 21 Apr 2026 | 
 Search | 
 + New Batch | 
 Edit mode on



All batches Export CSV

Batch ID	Function	Phase	Shift	Trainer	Team Coach	Start	Trainees	Progress	Prog. bar	Status	...
BT-2024-031	AR	RCM	Morning	Priya Nair	Rajan M.	10 Apr	18	72%	<div style="width: 72%;"></div>	In Progress	...
BT-2024-032	EVBV PA	CST	Evening	Kiran Sharma	Suma K.	02 Apr	14	91%	<div style="width: 91%;"></div>	On Track	...
BT-2024-029	Billing	LAW	Night	Ravi Kumar	Meena J.	18 Mar	22	90%	<div style="width: 90%;"></div>	Toll Gate	...
BT-2024-030	AR	LAW	Morning	Anitha Raj	Devi S.	20 Mar	19	92%	<div style="width: 92%;"></div>	On Track	...
BT-2024-027	EVBV PA	OJT	Evening	Suresh M.	Priya L.	05 Mar	11	96%	<div style="width: 96%;"></div>	On Track	...
BT-2024-028	Billing	OJT	Morning	Deepa V.	Asha R.	07 Mar	16	72%	<div style="width: 72%;"></div>	At Risk	...
BT-2024-025	AR	Completed	—	Mohan K.	Raj P.	10 Feb	20	100%	<div style="width: 100%;"></div>	Completed	...
BT-2024-024	Billing	Completed	—	Vinod S.	Geetha V.	01 Feb	17	100%	<div style="width: 100%;"></div>	Completed	...



Dashboard

Batch Creation

Onboard Trainee

Training Calendar

Assessments

Approvals & Delays

Phase Handover

Escalations

Reports

### A New Batch Creation

Batch ID (auto-generated):

Function \*:

Shift Timing \*:

Expected Start Date \*:

Duration (auto-calculated):

Training end date (auto-calculated):

*AR = 15 days · EVBV PA = 10 days · Billing = 10 days · Duration overridable by Training Manager*



### B Approval hierarchy

L1 — Training Manager \*:

L2 — Associate Director, Training \*:

Onboarding HRBP / HR Executive:

### C Trainee allocation

Number of trainees \*:

Source pool \*:

Phase assignment \*:

### D Remarks

*Add any notes or handover instructions for the Training team...*

*Function auto-sets duration · All phases = default*

*Function auto-sets duration — AR=15d, EVBV PA/Billing=10d — TM can override*

*Submit triggers email to Training team and HRBP*

Cancel Save Draft **Create Batch**



- Dashboard
- Batch Management
- Onboard Trainee**
- Training Calendar
- Assessments
- Approvals & Delays
- Phase Handover
- Reports
- Escalations
- Settings

Add trainees into Created Batch by HR . The batch ID is created (Auto generated) by TM, Configure duration by function, and notifies By the Training Manager.

### Search & add trainees By HR

Search by employee name, ID or department. Trainees must exist in HRMS.

Department:  From Date:  To Date:

- SR Sunita Rao** (New hire) EMP-10303 · Quality · Exp: 0 yrs · DOJ: 02/04/2026 · Hyderabad
- KD Karthik D.** (New hire) EMP-10303 · Quality · Exp: 0 yrs · DOJ: 02/04/2026 · Hyderabad
- DN Deepa Nair** (Transfer) EMP-10303 · Quality · Exp: 1 yrs · DOJ: 02/04/2025 · Hyderabad
- SR Sunita Rao** (New hire) EMP-10303 · Quality · Exp: 0 yrs · DOJ: 02/04/2026 · Hyderabad
- RM Rohit Menon** (New hire) EMP-10303 · Quality · Exp: 0 yrs · DOJ: 02/04/2026 · Hyderabad
- PA Priya Anand** (New hire) EMP-10303 · Quality · Exp: 0 yrs · DOJ: 02/04/2026 · Hyderabad

Min 5 trainees required · Batch ID auto-generated · TM (Training Manager) notified on submission · Function auto-sets duration · All phases = default

2 trainees added to this batch · Min 5 required before submitting

### Configure batch By TM – Training Manager

Batch ID:

Function \*:

Shift Timing \*:

Expected Start Date \*:

Training duration Auto Calculated:

Training end date (auto-calculated):

Phase assignment \*:

L1 — Training Manager \*:

L2 — AD Training \*:

Remarks:



Dashboard

Batch Management

Onboard Trainee

Training Calendar

Assessments

Approvals & Delays

Phase Handover

Escalations

Reports

Batch	Function	Shift	Trainees	Start	Phase
BT-2024-031	AR	Morning	18	10 Apr 2026	RCM — 15 days

## Assign trainer

Search

PN

**Priya Nair**

Specialty: AR · EVBV PA

2 active batches

Available

Assign

KS

**Kiran Sharma**

Specialty: Billing · AR

3 active batches

Available

Assign

RK

**Ravi Kumar**

Specialty: All functions

4 active batches

Occupied

View

AR

**Anitha Raj**

Specialty: EVBV PA · AR

1 active batch

Available

Assign

< Prev

Next >

## Current assignment

Trainer

*Not yet assigned*

Team Coach

*Not yet assigned*

## Assign Team Coach & QA Auditor

Team Coach \*

Search by name...

QA Auditor (for CST phase)

Assign later at CST stage

Notes

Any specific instructions...

Confirm Assignment



- Dashboard
- Batch Management
- Onboard Trainee
- Training Calendar**
- Assessments
- Approvals & Delays
- Phase Handover
- Escalations
- Reports

BT-2024-031 · AR · RCM Phase · 15 days · Morning · Trainer: Priya Nair

Start: 10 Apr 2026 · Expected End: 24 Apr 2026 · Day 8 of 15

Day 8 / 15

RCM Active

### Week calendar — 14–19 Apr

Mon 14	Tue 15	Wed 16	Thu 17	Fri 18	Sat 19
RCM Day 8 AR Denials <small>Today</small>	RCM Day 9 Denial Codes <small>Planned</small>	PKT — Denial Assessment <small>Planned</small>	RCM Day 11 Non-Denial <small>Planned</small>	PKT — Final Assessment <small>Planned</small>	Buffer / Optional <small>Optional</small>

### Day-wise session log

Day	Date	Topic covered	Attendance	Status	Remarks
D1	10 Apr	Revenue Cycle Management Intro	18/18	Completed	—
D2	11 Apr	AR Workflow & Claims Processing	18/18	Completed	—
D3	12 Apr	PKT Day 2 Assessment	17/18	Completed	1 absent
D4	13 Apr	Payer Guidelines & Rules	18/18	Completed	—
D5	14 Apr	BRCM Final Prep	18/18	Completed	—
D6	15 Apr	Non-Denial Codes	17/18	Completed	1 late
D7	16 Apr	Denial Management Practice	18/18	Completed	—
D8	17 Apr	AR Denial Practice — Module 3	—	In Progress	Today

### Log today's session — Day 8

#### Session topic covered

AR Denial Practice — Module 3

#### Session status \*

In Progress

#### Attendance \*

Present 18 / 18 Attendance % 100%

#### Remarks / notes

All trainees engaged; denial coding exercises completed

#### Delay reason (if Delayed)

Not applicable

#### Attachments (optional)

Drop files here or click to upload

Save Session Log Flag Delay



BT-2024-031 · AR · RCM Phase · 15 days · Morning · Trainer: Priya Nair

Start: 10 Apr 2026 · Expected End: 24 Apr 2026

Day 8 / 15

RCM Active

Edit mode ON



## Week calendar — 14-19 Apr

Cell actions

- Edit topic
- Reschedule
- Cancel session
- Mark complete

to reschedule · Right-click for more options

Mon 14	Tue 15	Thu 17	Fri 18	Sat 19	
RCM Day 8 AR Denials  Today	RCM Day 9 — Denial Codes Planned	PKT — Denial Assessment Planned	RCM Day 11 Non-Denial Planned	PKT — Final Assessment Planned	Buffer / Optional  Optional

## Day-wise session log

Inline edit: click Topic, Attendance or Remarks to edit · ... for row actions

Day	Date	Topic covered	Att.	Status	Remarks	...
D1	10 Apr	Revenue Cycle Management Intro	18/18	Completed	—	...
D2	11 Apr	AR Workflow & Claims Processing	18/18	Completed	—	...
D3	12 Apr	PKT Day 2 Assessment	17/18	Completed	1 absent	...
D4	13 Apr	Payer Guidelines & Rules	18/18	Completed	—	...
D5	14 Apr	BRCM Final Prep	18/18	Completed	—	...
D6	15 Apr	Non-Denial Codes	17/18	Completed	—	...
D7	16 Apr	Denial Management Practice	18/18	Completed	—	...
D8	17 Apr	AR Denial Practice — Module 3	—	In Progress	—	...

Edit mode: click any cell to edit inline · pencil to edit calendar topic · ... for row actions

## Log today — Day 8

### Session topic

AR Denial Practice — Module 3

### Session status \*

In Progress

### Attendance \*

Present 18 / 18 Att. % 100%

### Remarks

All trainees engaged; denial coding exercises completed

### Delay reason

Not applicable

### Attachments (optional)

Drop files or click to upload

Save Session Log

Flag Delay

Dashboard

Batch Management

Onboard Trainee

Training Calendar

Assessments

Approvals & Delays

Phase Handover

Escalations

Reports



Dashboard

Batch Management

Onboard Trainee

**Training Calendar**

Assessments

Approvals & Delays

Phase Handover

Escalations

Reports

BT-2024-031 · AR · RCM Phase · 18 Trainees · Session Day 8 · 17 Apr 2026

Trainer: Priya Nair

Present: 16

Absent: 2

Attendance: 88.9%

Edit mode ON

Search trainee name or employee ID...

✓ Mark all Present

✗ Mark all Absent

2 selected

Export CSV

Save All

### Mark attendance — today's session (Day 8)

*Click status pill to toggle · Click Remarks to edit inline · ... for archive / remove / escalate*

<input type="checkbox"/>	#	Employee ID	Trainee Name	Fn	Day 8 Status	Overall %	Sessions	Alert	Remarks	...
<input checked="" type="checkbox"/>	1	EMP-10231	Arjun Mehta	AR	Present <input type="checkbox"/>	100%	8/8	—	—	...
<input checked="" type="checkbox"/>	2	EMP-10232	Bhavana Rao	AR	Present <input type="checkbox"/>	100%	8/8	—	—	...
<input checked="" type="checkbox"/>	3	EMP-10233	Chetan Singh	AR	Absent <input type="checkbox"/>	75%	6/8	Low Attend.	Informed leave	...
<input type="checkbox"/>	4	EMP-10234	Divya Patel	AR	Present <input type="checkbox"/>	100%	8/8	—	—	...
<input type="checkbox"/>	5	EMP-10235	Faisal Khan	AR	Present <input type="checkbox"/>	87.5%	7/8	—	Late Day 3	...
<input checked="" type="checkbox"/>	6	EMP-10236	Geetha M.	AR	Absent <input type="checkbox"/>	62.5%	5/8	Critical	Medical leave — extended	Trainee actions <ul style="list-style-type: none"> <li><input checked="" type="checkbox"/> Edit details</li> <li><input type="checkbox"/> Archive trainee</li> <li><input type="checkbox"/> Remove from batch</li> <li><input type="checkbox"/> Raise escalation</li> </ul>
<input type="checkbox"/>	7	EMP-10237	Harish Kumar	AR	Present <input type="checkbox"/>	100%	8/8	—	—	...
<input type="checkbox"/>	8	EMP-10238	Indira S.	AR	Present <input type="checkbox"/>	100%	8/8	—	—	...
<input type="checkbox"/>	9	EMP-10239	Jagdish T.	AR	Present <input type="checkbox"/>	100%	8/8	—	—	...
<input type="checkbox"/>	10	EMP-10240	Kavitha R.	AR	Present <input type="checkbox"/>	100%	8/8	—	—	...
<input type="checkbox"/>	11	EMP-10241	Lakshmi V.	AR	Present <input type="checkbox"/>	87.5%	7/8	—	—	...
<input type="checkbox"/>	12	EMP-10242	Mohan Das	AR	Present <input type="checkbox"/>	100%	8/8	—	—	...
<input type="checkbox"/>	13	EMP-10243	Nalini R.	AR	Present <input type="checkbox"/>	100%	8/8	—	—	...
<input type="checkbox"/>	14	EMP-10244	Omar P.	AR	Present <input type="checkbox"/>	93.8%	7/8	—	—	...

... 4 more trainees (scroll to view)

Status pill = clickable toggle · Remarks = inline edit · ... = Archive / Remove / Escalate per trainee

< Prev

Next >



Dashboard

Batch Management

Onboard Trainee

Training Calendar

Assessments

Approvals & Delays

Phase Handover

Escalations

Reports

## PKT Assessment · BT-2024-031 · AR Function · RCM — Denial Assessment

Date: 17 Apr 2026 · Trainer: Priya Nair · Day 8 · Attempts recorded automatically

Threshold: ≥ 70%

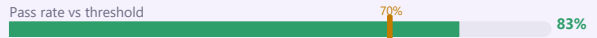
Edit mode  ON

- RCM Day 1-5
- BRCM Final
- Non-Denials
- Denial**
- RCM Final
- Re-Assessment

Click Score field to enter · Tab to next row · % and Result auto-calculate · ... to override result / view history / exempt trainee

<input type="checkbox"/>	#	Employee ID	Trainee Name	Score /100	Percentage	Result	Attempts	Remarks	...
<input type="checkbox"/>	1	EMP-10231	Arjun Mehta	82	82%	Pass	1	—	...
<input type="checkbox"/>	2	EMP-10232	Bhavana Rao	77	77%	Pass	1	—	...
<input type="checkbox"/>	3	EMP-10233	Chetan Singh	—	—	Absent	—	Absent today	...
<input type="checkbox"/>	4	EMP-10234	Divya Patel	91	91%	Pass	1	—	...
<input type="checkbox"/>	5	EMP-10235	Faisal Khan	64	64%	Fail	1	Re-assessment needed	...
<input type="checkbox"/>	6	EMP-10236	Geetha M.	—	—	Absent	—	Medical leave	...
<input type="checkbox"/>	7	EMP-10237	Harish Kumar	88	88%	Pass	1	<input type="text" value="Add remark..."/>	...
<input type="checkbox"/>	8	EMP-10238	Indira S.	73	73%	Pass	1	—	...
<input type="checkbox"/>	9	EMP-10239	Jagdish T.	58	58%	Fail <small>△ override</small>	1	Reassessment scheduled	Score actions <ul style="list-style-type: none"> <li><input type="checkbox"/> Edit score</li> <li><b><input checked="" type="checkbox"/> Override result</b></li> <li><input type="checkbox"/> Schedule reassessment</li> <li><input type="checkbox"/> Mark exempt</li> <li><input type="checkbox"/> View attempt history</li> </ul>
<input type="checkbox"/>	10	EMP-10240	Kavitha R.	95	95%	Pass	1	—	...
<input type="checkbox"/>	11	EMP-10241	Lakshmi V.	70	70%	Pass	1	Borderline	...
<input type="checkbox"/>	12	EMP-10242	Mohan Das	84	84%	Pass	1	—	...
<input type="checkbox"/>	13	EMP-10243	Nalini R.	79	79%	Pass	1	—	...
<input type="checkbox"/>	14	EMP-10244	Omar P.	86	86%	Pass	1	—	...

Live summary: 12 Attempted · 10 Passed (83%) · 2 Failed · 2 Absent



Score field = inline edit · % and Result = auto-calculated · ... = Override / History / Exempt

Export CSV

Schedule Reassessment

Submit Scores



- Dashboard
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- Phase Handover
- Escalations
- Reports

## Log a new delay

Batch \*

BT-2024-031 — AR — RCM Phase

Phase \*

RCM

Delay (days) \*

2

Delay reason \*

Trainer unavailable — medical leave

Justification (required)

Trainer Priya Nair on medical leave for 2 days. Replacement arranged from approved pool.

Assign to L1 approver \*

Karthik D. — Training Manager

Submit for L1 Approval

Cancel

## Pending approvals

L1 Pending (7)

L2 Pending (5)

**BT-2024-031 · RCM**

Trainer unavailable · 2 days

By: Priya Nair · 1h ago

Urgent

Approve

Reject

**BT-2024-029 · LAW**

Floor system downtime · 1 day

By: Ravi Kumar · 3h ago

Normal

Approve

Reject

**BT-2024-032 · CST**

QA team unavailable · 3 days

By: Kiran Sh. · 1d ago

High

Approve

Reject

**BT-2024-030 · LAW**

Trainee health issue · 1 day

By: Anitha Raj · 2d ago

Normal

Approve

Reject

**BT-2024-027 · OJT**

Ops floor maintenance · 2 days

By: Suresh M. · 2d ago

Normal

Approve

Reject

L1 approve → auto-routes to L2



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## RCM completion checklist

- All 15 sessions logged and completed
- Attendance  $\geq$  85% for all trainees
- PKT Day 1-5 assessments completed
- BRCM Final Assessment — pass rate  $\geq$  70%
- AR Denial & Non-Denial assessments completed
- AR Final Assessment — all eligible trainees cleared
- Virtual access approved by Ops Director
- Completion report generated
- Handover email drafted and reviewed

All  $\checkmark$  items required before handover unlocks

**Generate Completion Report**

## Handover form

**Receiving phase \***  
CST

**Assign Team Coach \***  
Suma K. — CST Team Coach

**QA Auditor for CST \***  
Select QA Auditor

**Handover remarks**

All 18 trainees cleared RCM with avg 82% PKT score. 2 reassessments cleared on 2nd attempt. Batch is ready for CST phase.

**Send Handover Email + Initiate CST**



# Escalations



Dashboard

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Phase Handover

**Escalations**

Reports

**3**  
Open

**2**  
In progress

**8**  
Resolved

**1**  
Escalated to HRBP

Status: 
 Type: 
 Batch: 
 From: 
 To:

## All escalations

ESC ID	Batch	Phase	Type / Reason	Raised by	Raised on	Assigned to	Status	Resolution
ESC-031	BT-2024-031	RCM	Repeated assessment fail	Priya Nair	15 Apr	HR + AD Training	Open	Pending HRBP discussion
ESC-028	BT-2024-028	OJT	Prod% below 80% for 3 wks	Deepa V.	10 Apr	HR + AD Training	Open	Counselling session set
ESC-027	BT-2024-027	OJT	Attendance critical (<60%)	Suresh M.	08 Apr	HRBP	HRBP	Pending decision
ESC-025	BT-2024-025	LAW	Toll gate fail — Week 2	Mohan K.	20 Mar	AD Training	Resolved	Extra week granted
ESC-024	BT-2024-024	CST	QA PKT score <70%	Ravi K.	15 Mar	Trainer + QA	Resolved	Retake passed — 78%
ESC-023	BT-2024-023	RCM	Trainer unresponsive	Anitha R.	10 Mar	Training Mgr	Resolved	Trainer replaced
ESC-022	BT-2024-022	OJT	Quality <85% for 2 weeks	Kiran S.	02 Mar	HR	In Progress2	Coaching active
ESC-021	BT-2024-021	CST	Absent >3 consecutive days	Leela V.	25 Feb	HR	Resolved	Leave approved, rejoined

Open escalations auto-notify HR + AD Training every 24h



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**3**  
Open

**2**  
In progress

**8**  
Resolved

**1**  
Escalated to HRBP

Status: All | 
 Type: All types | 
 Batch: All batches | 
 From: 01 Apr 2026 | 
 To: 21 Apr 2026 | 
 Filter | 
 + Raise Escalation | 
 Edit mode on

### All escalations

ESC ID	Batch	Phase	Type / Reason	Raised by	Raised on	Assigned to	Status	Resolution	...
ESC-031	BT-2024-031	RCM	Repeated assessment fail	Priya Nair	15 Apr	HR + AD Training	Open	Pending HRBP discussion	...
ESC-028	BT-2024-028	OJT	Prod% below 80% for 3 wks	Deepa V.	10 Apr	HR + AD Training	Open	Counselling session set	...
ESC-027	BT-2024-027	OJT	Attendance critical (<60%)	Suresh M.	08 Apr	HRBP	HRBP	Pending decision	...
ESC-025	BT-2024-025	LAW	Toll gate fail — Week 2	Mohan K.	20 Mar	AD Training	Resolved	Extra week granted	...
ESC-024	BT-2024-024	CST	QA PKT score <70%	Ravi K.	15 Mar	Trainer + QA	Resolved	Retake passed — 78%	...
ESC-023	BT-2024-023	RCM	Trainer unresponsive	Anitha R.	10 Mar	Training Mgr	Resolved	Trainer replaced	...
ESC-022	BT-2024-022	OJT	Quality <85% for 2 weeks	Kiran S.	02 Mar	HR	In Progress2	Coaching active	...
ESC-021	BT-2024-021	CST	Absent >3 consecutive days	Leela V.	25 Feb	HR	Resolved	Leave approved, rejoined	...

🔔 Open escalations auto-notify HR + AD Training every 24h



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## Reports

**TC Team Coach**  
Ascent Healthcare - RCM

### BT-2024-030 · AR · LAW Phase — Week 2 (Toll Gate) · Team Coach: Devi S.

Reporting period: 14–19 Apr 2026 · Due: 21 Apr 2026 (Tue) · 19 Trainees

**Toll Gate Week**

#### Trainee weekly performance

#	Trainee Name	Prod %	Quality %	Cases	Errors	Gate Result
1	Arjun Mehta	93%	96%	120	4	Cleared
2	Bhavana Rao	91%	92%	110	7	Cleared
3	Divya Patel	84%	88%	98	9	Repeat Wk2
4	Faisal Khan	95%	97%	135	4	Cleared
5	Harish Kumar	72%	80%	88	14	Repeat Wk2
6	Indira S.	90%	91%	108	8	Cleared
7	Jagdish T.	96%	98%	140	3	Cleared
8	Kavitha R.	78%	85%	95	12	Repeat Wk2
9	Lakshmi V.	92%	94%	118	6	Cleared
10	Mohan Das	93%	90%	122	9	Cleared
11	Nalini R.	96%	95%	130	5	Cleared
12	Omar P.	88%	92%	115	8	Cleared

*Below threshold → TM notified automatically*

#### Week summary

Total trainees	19
Gate cleared	14 (73.7%)
Repeat Week 2	3
Below Prod ≥ 90%	3
Below Quality ≥ 90%	1
Avg Prod%	88.6%
Avg Quality%	91.2%

#### Coach remarks

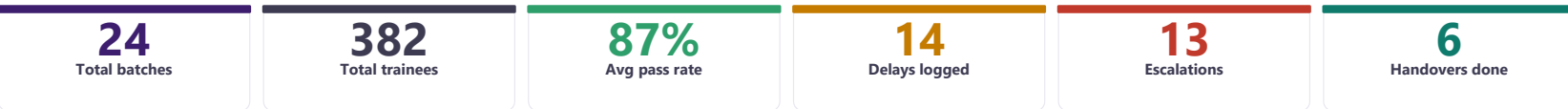
14 trainees cleared toll gate. Divya, Harish, Kavitha need coaching and repeat Week 2.

**Submit Weekly Report**



- Dashboard
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- Phase Handover
- Escalations
- Reports**

Report type: Training MIS Summary | 
 Function: All functions | 
 Phase: All phases | 
 Period From: 01 Mar 2026 | 
 Period To: 21 Apr 2026 | 
 [Generate](#) | 
 [Export CSV](#)



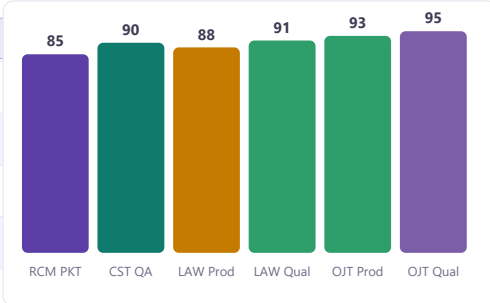
### Phase funnel — trainee flow



### Function-wise pass rate

Function	Batches	RCM %	CST %
AR	10	84%	91%
EVBV PA	8	79%	86%
Billing	6	91%	94%
Total	24	85%	90%

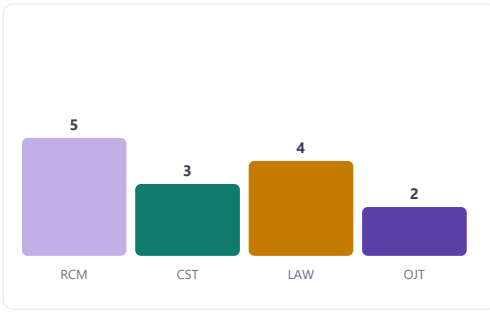
### Assessment pass rates



### LAW / OJT clear rates

Phase	Clear %
LAW	88%
OJT	93%

### Delays & escalations





# Coding Workspace — CPT / ICD Entry Form

## Mid-Fidelity Wireframes · Software Application Design

Ascent Healthcare · RCM Division · Coding Platform

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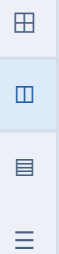


Chart Details

Chart	23456782
MRN	MM563773972
DOS	03/04/2024
Admit	04/04/2026
Discharge	06/04/2026

Patient Details

Patient	Peter Deck
DOB	03/11/1979
Age/Gender	42 / M
Visit Type	In-Patient
Pt Type	New Patient

Practice Details

Practice	SPIRE
Location	Stanford Amb.
State	California
Specialty	Surgery
Provider	Mark Zuckerberg

Payer Details

SOP	SOP Document
Updates	Update Tracker
Escalation	Escalation Tracker
PQRS	PQRS Doc
Rebuttals	Inputs · Comms →

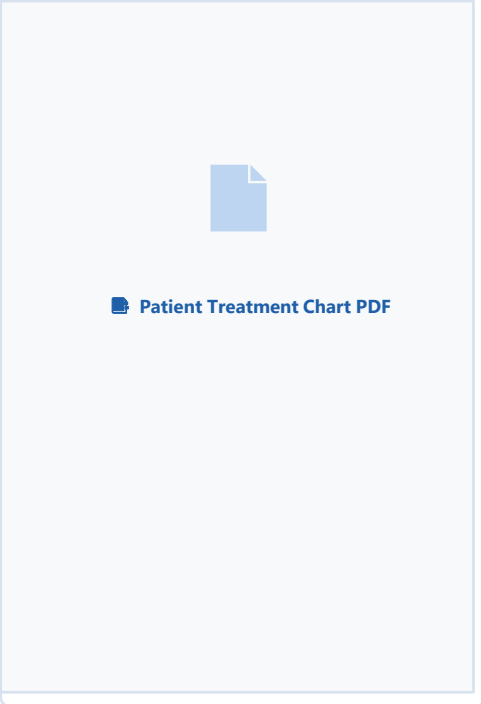
Clinical Note

Visit Document Deficient attach. Authorization

Medical Record Consult H & P

Progress Notes Producer Note Imaging

Pathology Discharge



Coding Workspace

#	ICT Code	Description
1		
2		

CPT / HCPCS

DOS \* CPT \* CPT Spectrum Modifier

1 Select... Select... Select...

ICD Code \* Provider \* Unit \* POS

Select... Select... 1 Select...

2 Select... Select... 1 Select...

Coder Request Form

Coder Communication ERP Communication

Coder Communication

Select... Select... Select... Select...

Resident Involved

Chief Complaint  History of Present Illness  Physical Exam

Share Attestations

Critical care Minutes Select...

Diagnostic Test E/M Select...

Scorecard over Ride Reason Select...

Save Submit

Auto Codes AI Suggested

- 4 AI Suggestions
- CPT 27447 Total Knee Arthroplasty
- CPT 00400 Anesthesia — Integument
- CPT 72148 MRI Lumbar Spine
- CPT 99213 Office / Outpatient Visit

Accept All

**Chart Details**

Chart **23456782**  
 MRN **MM563773972**  
 DOS **03/04/2024**  
 Admit **04/04/2026**  
 Discharge **06/04/2026**

**Patient Details**

Patient **Peter Deck**  
 DOB **03/11/1979**  
 Age/Gender **42 / M**  
 Visit Type **In-Patient**  
 Pt Type **New Patient**

**Practice Details**

Practice **SPIRE**  
 Location **Stanford Amb.**  
 State **California**  
 Specialty **Surgery**  
 Provider **Mark Zuckerberg**

**Payer Details**

SOP **SOP Document**  
 Updates **Update Tracker**  
 Escalation **Escalation Tracker**  
 PQRS **PQRS Doc**  
 Rebuttals **Inputs · Comms →**


**Clinical Note**

**Visit Document** Deficient attach. Authorization

Medical Record ▾ Consult ▾ H & P ▾

Progress Notes ▾ Producer Note ▾ Imaging ▾

Pathology ▾ Discharge ▾

 **Patient Treatment Chart PDF**

**Coding Workspace** Notes / Remarks Reference Attachments

#	ICT Code	Description
1	<input type="text"/>	<input type="text"/>
2	<input type="text"/>	<input type="text"/>

**CPT / HCPCS**

1  
 DOS \*  CPT \*  CPT Spectrum  Modifier

ICD Code \*  Provider \*  Unit \*  POS

2  
 DOS \*  CPT \*  CPT Spectrum  Modifier

ICD Code \*  Provider \*  Unit \*  POS

**Coder Request Form** Coder Communication ERP Communication

Coder Communication ▾

Resident Involved

Chief Complaint  History of Present Illness  Physical Exam

Share Attestations

Critical care Minutes

Diagnostic Test E/M

Scorecard over Ride Reason

Save **Submit**

**Auto Codes**  
AI Suggested

**4 AI Suggestions**

**CPT 27447**  
Total Knee Arthroplasty

**CPT 00400**  
Anesthesia — Integument

**CPT 72148**  
MRI Lumbar Spine

**CPT 99213**  
Office / Outpatient Visit

**Accept All**



- Dashboard
- Work Pool
- My Work Queue
- Rebuttal Review
- My Transactions
- Reports
- Knowledge

### Chart Details

Chart	23456782
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## Clinical Note

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Medical Record ▾ Consult ▾ H & P ▾

Progress Notes ▾ Producer Note ▾ Imaging ▾

Pathology ▾ Discharge ▾



**Patient Treatment Chart PDF**

### Coding Workspace

#	ICT Code	Description	+
1	<input type="text"/>	<input type="text"/>	
2	<input type="text"/>	<input type="text"/>	

### CPT / HCPCS

	DOS *	CPT *	CPT Spectrum	Modifier	+
1	<input type="text"/>	Select... ▾	<input type="text"/>	Select... ▾	
	ICD Code *	Provider *	Unit *	POS	
	Select... ▾	Select... ▾	1	Select... ▾	
2	<input type="text"/>	Select... ▾	<input type="text"/>	Select... ▾	
	ICD Code *	Provider *	Unit *	POS	
	Select... ▾	Select... ▾	1	Select... ▾	

### Coder Request Form

Coder Communication ERP Communication

### Coder Rebuttal Form

Coder Communication ▾

Rejection Comments / Remarks

*Write Your Rejection Remarks with 50 words...*

### Rebuttal Communications

March 7, 2026

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MRN **MM563773972**

DOS **03/04/2024**

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Updates **Update Tracker**

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PQRS **PQRS Doc**

Rebuttals **Inputs · Comms →**

### Clinical Note

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Medical Record ▾ Consult ▾ H & P ▾

Progress Notes ▾ Producer Note ▾ Imaging ▾

Pathology ▾ Discharge ▾

 **Patient Treatment Chart PDF**

### Coding Workspace

#	ICT Code	Description	Actions
1	<input type="text"/>	<input type="text"/>	
2	<input type="text"/>	<input type="text"/>	

### CPT / HCPCS

#	DOS *	CPT *	CPT Spectrum	Modifier	Actions
1	<input type="text"/>	Select... ▾	<input type="text"/>	Select... ▾	
	ICD Code *	Provider *	Unit *	POS	
	Select... ▾	Select... ▾	1	Select... ▾	
2	<input type="text"/>	Select... ▾	<input type="text"/>	Select... ▾	
	ICD Code *	Provider *	Unit *	POS	
	Select... ▾	Select... ▾	1	Select... ▾	

**Coder Request Form** Coder Communication ERP Communication

### Coder Rebuttal Form

Coder Communication ▾

**Rejection Comments / Remarks**

*Write Your Rejection Remarks with 50 words...*

Save **Submit**

### Rebuttal Communications

March 7, 2026

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Clinical Note

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Medical Record ▾ Consult ▾ H & P ▾





Progress Notes ▾ Producer Note ▾ Imaging ▾

Pathology ▾ Discharge ▾

Patient Treatment




 [Patient Treatment Chart PDF](#)

Coding Workspace

#	ICT Code	Description	Notes / Remarks	Reference Attachments
1	<input type="text"/>	<input type="text"/>		 
2	<input type="text"/>	<input type="text"/>		 

**CPT / HCPCS**




DOS \* CPT \* CPT Spectrum Modifier

1  Select... ▾  Select... ▾  

ICD Code \* Provider \* Unit \* POS

Select... ▾ Select... ▾ 1 Select... ▾

DOS \* CPT \* CPT Spectrum Modifier

2  Select... ▾  Select... ▾  

ICD Code \* Provider \* Unit \* POS

Select... ▾ Select... ▾ 1 Select... ▾

Coder Request Form

Coder Communication ERP Communication

Coder Rebuttal Form

Coder Communication ▾

Rejection Comments / Remarks

Write Your Rejection Remarks with 50 words...

Save **Submit**

Rebuttal Communications

March 7, 2026

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