AERA by webpt

Your Aera autonomy plan

What Aera runs on its own, what waits for your OK, and what stays with your team. Work through it together, then bring it to setup. Make your plan online at meetaera.com/autonomy.html.

1 **Review each setting together.** Tick one box for each task.

2 **Write who owns it today** and anything you'd want to check first.

3 **Bring it to setup.** Your settings can change at any time.

Run on their own	Wait for your OK	Stay with a person	1 Always the clinician

Front desk

Talk it through

Which of these takes the most of your front desk's time today?

What would you want to see before Aera books a patient on its own?

Task	Setting (tick one)	Who owns it today	Notes
Referral intake Read referrals from fax, email or portal and enter them	☐ On its own ☐ With my OK ☐ A person		
Insurance eligibility Verify benefits, co-pays and authorization limits	☐ On its own ☐ With my OK ☐ A person		
Intake forms Send intake to patients to finish from home	☐ On its own ☐ With my OK ☐ A person		
Booking first visits Reach new patients and book the first visit	☐ On its own ☐ With my OK ☐ A person		
Appointment reminders Remind patients by text, phone and email	☐ On its own ☐ With my OK ☐ A person		
Filling cancellations Offer openings to the right patient on the waitlist	☐ On its own ☐ With my OK ☐ A person		

Clinical

Talk it through

Where do notes slow your clinicians down the most?

What would your clinicians want to check in every draft?

Task	Setting (tick one)	Who owns it today	Notes
Visit prep Summarize history, goals and progress before each visit	☐ On its own ☐ With my OK ☐ A person		
Drafting the note Draft the visit note as care happens	☐ On its own ☐ With my OK ☐ A person		
Coding checks Check codes against what was documented	☐ On its own ☐ With my OK ☐ A person		
Home programs Send the home exercise program from the visit	☐ On its own ☐ With my OK ☐ A person		
Signing the note Only a licensed clinician signs. Aera never signs a note	■ **Always the clinician**		

Billing

Talk it through

Which denials cost you the most today?

Which payers or amounts should always get your OK?

Task	Setting (tick one)	Who owns it today	Notes
Claim checks before submission Catch payer gaps while the note is still open	☐ On its own ☐ With my OK ☐ A person		
Claim submission Submit clean claims	☐ On its own ☐ With my OK ☐ A person		

Task	Setting (tick one)	Who owns it today	Notes
Denial follow-up Trace each denial to its source and follow up	☐ On its own ☐ With my OK ☐ A person		
Denials Trace a denial to its cause and prepare the fix	☐ On its own ☐ With my OK ☐ A person		
Payment posting Post payments and reconcile	☐ On its own ☐ With my OK ☐ A person		

Patients

Talk it through

What do patients ask your front desk about most often?

Which messages should always come from a person?

Task	Setting (tick one)	Who owns it today	Notes
Rescheduling requests Let patients move a visit on their own	☐ On its own ☐ With my OK ☐ A person		
Progress check-ins Check in between visits and share progress with the therapist	☐ On its own ☐ With my OK ☐ A person		
Balance reminders Send clear bills and reminders	☐ On its own ☐ With my OK ☐ A person		

Your practice

Talk it through

What do you check first every morning?

Which changes should reach you right away?

Task	Setting (tick one)	Who owns it today	Notes
Morning brief A brief on every location before the day starts	☐ On its own ☐ With my OK ☐ A person		

Task	Setting (tick one)	Who owns it today	Notes
Alerts when something changes Flag what changed, why, and what to do about it	☐ On its own ☐ With my OK ☐ A person		

Decisions

Who reviewed this plan

Plan owner

Revisit on

Questions to bring to setup