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Login with Two Factor Authentication

This article describes the necessary steps to log in to OfficeEMR while using a 2FA Application. The two-factor authentication process requires a user to have a **Username**, **Password**, **Company**, **and Token**. Depending on your practice's policies, you may be able to log in without a token.



Login to OfficeEMR

- 1. Navigate to Login Screen
- 2. Enter your:
 - User Name
 - Password
 - Company
- 3. Select Login. If your practice has no additional 2FA requirement you will be granted access to the system.
- Once first-factor authentication is passed, you will be prompted to enter the Two Factor Authentication Token from your mobile application configured upon initial setup.



5. Once the code is entered you will be granted access to the system.

Comments and Alerts

Patient Comments is a tool to either add a comment or note that is viewable within the Patient Setup. Comments may be setup as an alert in order to notify staff members of important information pertaining to a specific patient.

Add a Comment

1. Open the Patient Setup



2. Select Comments from the left navigation menu then the "+" symbol at the bottom



3. Type comment into the text area under New Comment and click Save

Patient Comments T3st, Danielle Born: Jan 1, 1975 (48y) Gender: Aver Comment New Comment By: Idanielle 02/10/2023 12:20PM (EDT) New Patient comment goes here! Default Comments Alert Save

4. Edit Comment by selecting the pencil icon next to the Comment, edit text and click Save

Patient Setup	New Save	rein Mo	ore	
	Patient Comments T3st, Danielle Born: Jan 1, 1975 (48y)			
	✓ Existing Comments			
Summary			Туре	
Demographics			User	
Insurance	P			
Responsible Party			Usor	
Emergency Contact			Oser	
Comments				
Case Management				
Dialysis				
MML Self Schedule				

4. Default Comments may be used by choosing Append or Replace buttons.



Append this comment text to current comment This will add verbiage from Default Comment + without replacing anything already typed into the Comment field and keeps Default Comments available.



Replace comment with this comment text. This will replace anything already typed into the Comment field and collapse the Default Comments area.

Add an Alert

Follow these steps to add an alert:

1. In the comments window, expand the **Alert** area.

Patient Setup	New Save Train More
	Patient Comments T3st, Danielle Born: Jan 1, 1975 (4)
	> Existing Comments
	New Comment
Summary	
Demographics	New Comment
Insurance	
Responsible Party	
Emergency Contact	
Comments	> Default Comments
Case Management	
Dialysis	
MML Self Schedule	> Alert
Sliding Fee	

2. Set the **Effective Date** of the alert, and set the **Expiration Date** if needed. **Effective Date** is the first day the alert will be visible. **Expiration Date** is the date the alert will no longer be visible. These dates are important especially when using them for billing activity.

✓ Alert			
Effective Date	10-10-2023		
Expiration Date	🛱 Expiration Date		
 > Alert > Users/Groups AII 			

3. Select what type of alert you are creating. This tells the system when the alert should pop-up on the screen (ex: When the patient is loaded in the EMR)



4. If necessary, you can assign the alert to one or more users or user group. If the alert should pop-up for every user, then omit this step.



5. Finally, enter the alert message in the Comment box above Alert and select **Save**.

> Existing Comments	
🗩 Edit Comment	
By: 💄 !danielle 🏥 2/10/2023	
New Alert	
> Default Comments	
✓ Alert	
Effective Date	🛱 02-09-2023
Expiration Date	🛱 02-16-2023
✓ Alert	
> Billing	
> Clinical	
> Front Office	
> Users/Groups All	

My Task - Communications

The My Tasks Communication is an "inbox" of communications sent interoffice. Communications can either be sent as a message or a task. Additionally, communications can be a general interoffice message, i.e. informing users of a meeting or linked to a patient chart.

Note: Communications can only be removed from a patient's chart when the attachment has been removed.

Communication Inbox

1. To read a communication click on **Communication** in the **My Tasks** portal. Your inbox contains messages and tasks sent to you as an individual user or any group in which you are a part of.



2. The **My Task Communications** is organized by Inbox (new messages), sent messages and deleted messages. The **Inbox** number count represents unread messages.

Mail		
🗸 📥 Inbox	(2)	
🖄 Sent Items	16	
beleted Items	0	
		्र 🗄 र 🎓 र 🚺

3. The Arranged By link allows you to sort messages in your inbox by Date, User, Subject or Priority

Mail	
🗸 🖂 Inbox	(1)
🖾 Sent Items	16
beleted Items	0
	् 🚽 📑 ד 🎓 ד 🚺
Arranged By: Date	
🗏 Date: Today	Date
	User
😑 🛛 🕅 Howard	Subject
🔄 🕕 Howard	Priority dule Follow-up
🗉 Date: Older	

4. The icon next to the message indicates if the communication was sent as a Message or Task. The **manila envelope** represents a message and the **clipboard** represents a task



5. To read a message or task, click on the message in the inbox. The message will display to the right of the screen. Additionally, the number count will decrease as this is now a "read" message.

- Office Communication	
Mail	🔁 New 🖶 🗙 🎇 Reply 🖾 Reply All 🎽 Forward 🔅 Own Task 💆 Complete 闅 Reassign Task
 ✓ <a>linbox (1) ② Sent Items 16 ☑ Deleted Items 0 ○ <a>line (5) 	Refill Howard, Carole Sent. Fri 10/15/2021 8:11AM (EDT) To: Completed Comm.; Howard, Carole; Howard, Carole; Nurse
Arranged By: Date	🖞 Chart #9385; T3st, Ruth; Female; Age: 91y; Home:(205) 555-5555
🗆 Date: Today	Patient called asking for refill of Norco- approved by Dr. Smith - sent to CVS- patient informed
🔷 🔋 Howard, Carole Refill	
🖻 🕕 Howard, Carole Schedule Follow-up	
Date: Older	
🔶 🔋 Howard, Carole New Office Communication	2
Administrator, Local MIPS Build FAILED	

Message Toolbar

🖂 <u>N</u> ew 📄 🗙	🔛 Reply 🛛 🔛 Reply All	🖙 Forward 🗟 Own Task	Complete	🔋 Reassign Task

- 1. New Create a new message
- 2. **Print** Print the message

🤗 PDF Report - Internet Explorer		-	×
	Refl Howard, Carole Set: Fri UNISCO21 E 11AM (ECIT) Tix Completed Comm.; Howard, Carole, Nume		
	[Chart 9385; T3st, Ruth; Female; Age: 91y; Home:(205) 555-5555		
	Patient called asking for refil of Norco- approved by Dr. Smith - sent to CVS- patient informed		

3. **Delete** - If no further action is required, select the delete **x** to remove the message from your inbox (*Communications linked to a patient's chart will not be deleted*). If the message is sent to a group, it will only be deleted from your inbox.

4. Reply - Reply to the sender only

r,	Reply: F	Refill
1	🔀 <u>S</u> end	💆 Task 😔 Normal Importance 🔻 🖉 Attach 🗌 Mark as Completed
	\rm То	Howard, Carole
A	Subject	RE: Refill
ł	Attached	Chart #9385; T3st, Ruth; Female; Age: 91y; Home:(205) 555-5555
		Ť
		-
	From: Sent: To: Subject:	Howard, Carole Fri 10/15/2021 8:11AM (EDT) Completed Comm.; Howard, Carole; Howard, Carole; Nurse Refill
	Patient ca	illed asking for refill of Norco- approved by Dr. Smith - sent to CVS- patient informed

5. Reply All - Reply to all recipients of the original message

Send Send	🔽 Task 🤍 Normal Importance 🔻 🗏 Attach 📃 Mark as Completed	
To <u>N</u>	fauro, Dawn; Howard, Carole; Cooke, Sarah; Bowlick, Allison; Rasmussen, Dawn; Dews, Elaine; nicole, test; Test, Carole; Grayson, Regina; fouth, Loud; Wade, Alex; Head, Chandler	
ubject F	YE: Refill	
ttached C	Chart #9385; T3st, Ruth; Female; Age: 91y; Home:(205) 555-5555	
		ABC
		~
	т	
		~
From:	Howard, Carole	
Sent: To: Subject:	Completed Comm.; Howard, Carole; Howard, Carole; Nurse Refill	

6. Forward – Forward message to another user

Forward	: Refill
🔀 <u>S</u> end	🖆 Task 😔 Normal Importance 👻 🎚 Attach 📃 Mark as Completed
🖪 То	
Subject	FW: Refill
Attached	Chart #9385; T3st, Ruth; Female; Age: 91y; Home:(205) 555-5555
	dê.
	r
	L
From: Sent: To: Subject:	Howard, Carole Fri 10/15/2021 8:11AM (EDT) Completed Comm.; Howard, Carole; Howard, Carole; Nurse Refill
Patient cal	lled asking for refill of Norco- approved by Dr. Smith - sent to CVS- patient informed

7. **Complete** – If you need to add additional notes to the communication select **Complete**. This brings up a **Complete Message** window to type additional notes.

Chart #9385: T3st Ruth: Female: Ane: 91v: Home:/205) 54	55,5555	
Charl #5505, 1551, Ruin, Feinale, Age. 519, Home. (205) 5.	santa CVC Instant informed	
uent called asking for relin of Norco- approved by Dr. Smith	- sent to CVS- patient mormed	
	Complete Message	×
	Complete Message	×
	Complete Message Confirmed patient received the rx	×
	Complete Message Confirmed patient received the rd	×
	Complete Message Confirmed patient received the rd	×
	Complete Message Confirmed patient received the rd I	×
	Complete Message Confirmed patient received the n I	×
	Complete Message Confirmed patient received the rx	×

Tasks Overview

Sending a Communication as a **Task** allow users to track the progress of a communication that would require additional follow-up. Tasks can be sent to an individual user or a group of users.

1. Select the Task from your Inbox, task details will display to the right of the inbox

G - Office Communication					
Mail	New 🖶 🗙 🖾 Reply 🖾 Reply All 🖾 Forward 😨 Own Task 🕐 Complete 🔯 Reassign Task				
 ✓ Inbox (0) ② Sent Items 16 ☑ Deleted Items 1 ☑ ♥ 👘 ♥ 爻 	Schedule Follow-up Howard, Carole Sent Fri 10/15/2021 8:07AM (EDT) To: Howard, Carole; Howard, Carole; Nurse Task: (Open)				
Arranged By: Date	() Chart #9391; Test, Kelly; Female; Age: 21y; Home:(502) 555-5555, Other:(502) 550-5409				
🗆 Date: Last Week					
🖄 🔋 Howard, Carole 💦 Schedule Follow-up	Please schedule patient for a follow-up in 4 weeks				

2. Select Own Task on the toolbar if you will be completing this task

Forward	💁 Own Task	Complete	🛃 Reassign Task
	3		

3. If another user owns the task, this message will appear



4. Select Own Task again if you want to disown the task, allowing another user to own the task



5. Once a task is owned, additional options appear on the toolbar.

🖂 New 📄 🗙 🔀 Reply 🔛 Reply All 🔀 Forward 🗟 Own Task	🔽 Complete 📮 Reassign Task
•••	

6. Complete - Completes the task and allows the user to type in notes/messages related to the completion of

🙀 Reply All 🛛 🏳 Forward 😨 Own Tasl 🚺 Complete	🐕 Reassign Task				
h3					
EDT) .omm.; Howard, Carole; Howard, Carole; Nurse; Office Staff ss)					
le; Age: 21y; Home:(502) 555-5555, Other:(502) 550-5409					
up to review lab results					

Complete Task Message	×
Patient is scheduled	^
	ок

the task

7. Reassign Task - Reassigns the task to a new user or group of users

E	J - Off	ice Communication		
N	Forward			Reassign Task
~	Forward			
	Send	i 🛛 Task 🗇 Normal Importance 🔻 🔍 Attach 🔄 Mark as Completed		
	🖪 То			
Г				
A	Subject	FW: Labs		
h	Attached	Chart #9391; Test, Kelly; Female; Age: 21y; Home:(502) 555-5555, Other:(502) 550-5409		
F				
Ľ				
Ľ				
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E				
2				
C			\checkmark	
	From: Sent:	Howard, Carole		
	To:	Test, Carole; Completed Comm.; Howard, Carole; Howard, Carole; Nurse; Office Staff		
	Subject	: Labs		
	Please so	shedule patient for follow-up to review lab results		

Send a Communication

The My Tasks Communication tool allows for interoffice communications that can be initiated from the EMR, iScheduler, Billing Portal or My Task areas. Additionally, you can link a patient chart, claim, or eDocument to the Communication. Communications can be sent without a patient's chart linked or they can be linked to a patient chart when initiated from a patient record. Note: Communications cannot be deleted or removed from a patient's chart once they are sent.

Send a General Communication to Users/Groups

To create or send a general communication that is not linked to a patient, navigate to My Tasks - Communications

1. Select **New** (manila envelope)

Billing List	Generation	
My Tasks 🗘	Mail	New 🖶 🗙 🎇 Reply 🔛 Reply All 🔛 Forward 🗔 Own
Communication (0)	✓ ■ Inbox (0)	New Office Communication
Orders (11)	Sent Items 12	Howard, Carole
Results (0)	Deleted Items 0	Sent: Wed 06/23/2021 4:04PM (EDT) To: Howard Carole
Superbill (0)	्र 🗄 - 🎓 - 🗘	
Progress Notes (15)	Arranged By: Date	Chart #9359; T3st, Joseph L.; Male; Age: 27m; Home: (343) 543-6786
eDocuments (1)	Deter Older	MyMedicalLocker Message
Prescription (0)	Date: Older	
Reminder (0)	Howard, Carole New Office Communication	please review this MML message from patient
Eligibility (0)	Administrator, Local MIPS Build FAILED	
🤭 Patient Portal (10)	└─ V ······	

2. The New Message window pops-up

New Message	X
🖾 Send 🛛 🔁 Task 😓 Normal Importance 👻 🖉 Attach 📃 Mark as Completed	
To	
Subject	
	ABC
	~
1	
	~

3. Add users and/or groups that will receive this communication by clicking on **To.** Search for User/Groups, add and click **OK**

M					
J	New Me	ssage			
	🔀 <u>S</u> end	💆 Task 🔶 Norma	I Importance	•	Attach
	🖪 То	<u>Test, John; Provider - Phy</u>	<u>sician; Nurse</u>		
A	Subject	Assign To			×
Ē	A rep is I	Search for Users and G	roups		Q
7		✓ Search			
F		🗸 Test, John	User		\sim
1		 Provider - Physician 	Group		
		 Favorite(s) 			
		✓ Nurse	Group		
			\$		~
			r		
			ОК	Clos	е

4. Type in the subject on the Subject line, add message details, then click Send

M			
-	New Me	ssage	\times
1	Send Send	🛛 😇 Task 🛛 😔 Normal Importance 👻 🖉 Attach 📄 Mark as Completed	
I	🔳 То	<u>Test, John; Provider - Physician; Nurse</u>	
	Subject	Rep Lunch	=
-	A rep is	bringing in lunch Thursday for the office. Enjoy!	5
1			^
<			
-			
		I	

Send a Communication from the EMR Portal

1. Open a patient and then use the Patient drop down and select Communication



2. The New Message window appears.



3. Select the To field to select the user/group to send the message to. A communication can be sent to any combination of users and/or groups

	New Message						
F	🖾 <u>S</u> end	🔄 Task 😔 Normal Importance 🔻	0 Attach				
	🖪 То						
Н	-						
	Subject	🕒 Assign To	X				
	Attached	nurse	X 🔍 :(88)				
			x				
		Nurse Group	ha				
			40				

4. Subject line- by default the Subject line is New Office Communication, it is best practice to type in a more specific subject line

	New Me	ssage
	🔀 <u>S</u> end	🔄 Task 😔 Normal Importance 🔻 빈 Attach 📃 Mark as Completed
	🖪 То	Nurse
-		
	Subject	Medication Refill request
	Attached	Chart #9328; Test, Patient; Female; Age: 46y; Home:(888) 280-6678

5. Attachment- by default the Patient Chart is attached to the Communication initiated in the EMR. Click on the Attach (paperclip) to attach additional items to the message

	New Me	ssage
	🔀 <u>S</u> end	💆 Task 😔 Normal Importance 👻 🕖 Attach 🗌 Mark as Completed
-	\rm То	Nurse
	Subject	Medication Refill request
	Attached	Chart #9328; Test, Patient; Female; Age: 46y; Home:(888) 280-6678
		I) Attachments
		Chart Claim Document Doc Group Chart #
		Attach Close

6. Type in body of message and select to Send or Task and optional Importance

New Me	ssage		×
Send	🔁 Task 😔 Normal Importance 🔹 🖉 Attach 📃 Mark as Completed		
🖪 То	Nurse		
Subject	Medication Refill request		
Attached	Chart #9328; Test, Patient; Female; Age: 46y; Home:(888) 280-6678		
Patient	alled in with refill request for Percocet 5-325 mg. Preferred pharmacy is CVS on 5th street. Please call patient to confirm at 555-555-5555	ABC	
			1
	T		

- 7. Select Send to send communication to users/groups in the To field and closed window
- 8. Select Task communication to send to users/groups as a task they can own for tracking of completion
- 9. Importance drop down can be utilized to select Low, Normal or High Importance



Send a Communication from the iScheduler Portal

1. Open a patient or select patient on the schedule. Use the Patient drop down and select Send



2. The New Message window pops up, fill-in all message options and click Send or Task

н	عمى ا			
F	Ľ	New Me	ssage	7 ×
		🔀 <u>S</u> end	I 💆 Task 😓 Normal Importance 👻 🛛 Attach 📃 Mark as Completed	
		🔳 То		
	1	Subject	New Office Communication	
	4	Attached	Chart #9328; Test, Patient; Female; Age: 46y; Home:(888) 280-6678	
		1		ABC
				×
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Т				

Send a Communication Billing Portal

1. Receipts Details window

Patient	9348 - Ruth A. Demers (81y)	Paid By	Ruth A. Demers						
Status	Error	Receipt #	4406 - 8913						
Received	03/23/2021 08:27:19 (EDT)	Hold	03/30/2021						
Туре	Co-Pay	Method	Cash						
Amount	<u>\$10.00</u>	Unapplied	\$10.00						
Check #		Source	Normal						
Location	Hansen's Happy Faces Clinic								
Messages	03/31/2021 No claim can be found	I to apply the copa	03/31/2021 No claim can be found to apply the conay to						

	Receipt Actions
	Hold Receipt
	Reconcile Receipt
	Reverse Receipt
	🖳 Edit Receipt
	🗟 Create Claim
ſ	
	Set Date Range

愈

y Past and Future Appointments

Last (3)								
в	Date	Resource	Location	Actions				
	05/29/2020 9:00am	Grogan MD, James	Choice Training	🐻 Create Claim				
	03/23/2021 10:00am	Hansen MD, Sherrie	Choice Training	Create Claim				
P	03/24/2021 9:30am	Hansen MD, Sherrie	Hansen's Happy Faces Clinic	Create Claim				

No future appointments found.

✓ Procedures Linked to Receipt

This receipt is not currently associated with a claim.

2. Claims Detail window

Claim #26856 for Karen T3st 01/01/2020 (21m) X													
Dpen 🔻 🗟 Save 🔹 🚱 History 🔹 📩 Payments 🔹	- 8	Patient	-								Search for Pa	tient 🔍 🗸	· 🔯
▲ Status			Service										
Claim 26856 •		Insurance T		T3st -	T3st →			Location	Choice Train	ing	Q		
Status Info. requested from office V	-	Guarar	tor	99 x311{					Rendering	Howard, Car	ole L.	Q	
Substatus	×	Comm	ents	ation			Q		Referring	Referring Pro	ovider	Q	
Level Primary V Billing Electronic V		History		vider			Q			Referred		\$	
Type Medical 🗸	t	Patient	Eligibility				Q			viders			
Owner Howard, Carole 🔍	2	Patient	Communications	urance	vrance Q								
837 Professional Institutional	22	Contractions manual for the second se		nsurance	nsurance Q vrance Q								
	Ð			vrance									
	J(
 Procedures and Diagnoses 		Progre	ss Notes										
# Service Date Procedure POS		Accide	nt/Rel. Cause			Mod	lifiers			Diag	nosis »		1
1 06/30/2021 A 06/30/2021 A 99213 11		1 00	\$150.00	amount \$150	1	2	3	4	.1301	2	3	4	
2 06/30/2021 0 06/30/2021		1.00	\$0.00				-		J301				
										1		I	1
Add New Item					То	tal: \$1	50.00	Pay/	Adj: \$0.00	Balance: \$15	50.00 Receip	ts: \$0.00 -	
▲ Additional Information		Mess	ages and Moni	toring				Q	ueue and T	asking (3)			

3. Communications sent from the Claims Detail window automatically attach the Patient Chart and the Claim

4	New Message	×
1	🖾 Send 🛛 💆 Task 🛛 💬 Normal Importance 🔹 🖉 Attach 📄 🥅 Mark as Completed	
	Е то	
	Subject	
	Attached Claim #26856; T3st, Karen; Female; Age: 21m; Home:(865) 482-1999 x3118	^
	Chart #9340; T3st, Karen; Female; Age: 21m; Home:(865) 482-1999 x3118	✓
		ABC
		^

Viewing Communications

Once a Communication is sent, it is saved to the Patient's Chart. The Communications can be viewed in several areas:

1. EMR Summary - Encounters

Encounters						
Future						
No Appointments Scheduled						
Today						
88 C Howard	Medication Refill request	10/07/2021				
, , , o. nomana						
, , , , , , , , , , , , , , , , , , ,	Patient called in with refill re	quest for Perc				
Past	Patient called in with refill re	quest for Perc				
Past	Patient called in with refill red	quest for Perc 08/27/2021				
Past R. Smith J. McGill	Patient called in with refill red New Patient Visit Post-Op	quest for Perc 08/27/2021 06/30/2021				
Past R. Smith J. McGill R. Pain	Patient called in with refill red New Patient Visit Post-Op Follow-up Visit	Quest for Perc 08/27/2021 06/30/2021 06/30/2021				
Past R. Smith J. McGill R. Pain R. Smith	Patient called in with refill red New Patient Visit Post-Op Follow-up Visit NP W/Referral	Quest for Perc 08/27/2021 06/30/2021 06/30/2021 06/03/2021				

					mune sure reterror	
		Clin	ical Messages			
The U.S. Preventi	live Services Task Force (USPSTF) recommen	ds screening for high blood pressure in adults age 18 years and older.		10/07/2021 From: Howard, Carole To: Nurse Subject: Medication Refill request Patient called in with refill request for Percoret 5	5-325 mg. Preferred pharmacy	is CVS on 5th stree
			limeline			
Medications	\checkmark	\bigotimes			No.	Ť
Notes						
Immunizations						
Order Results	_					
Communications	•					
eDocuments)				

3. EMR/iScheduler - Patient Index drop down/Patient Communications

1	Patient T *** More T	
	Comments	
	Communication	
	Patient Communications	
	Care Team	
	Hospital Round History	
<u>n</u>	Open Patient in Billing	
-	e 0	🖶 🔀 🔀 Test, Patient Born 19-Jul-1975(46y) Gender Female
Arrang	ed By: Date	Medication Refill request
🗉 Dat	e: Today	Howard, Carole
🗎 Ma	il Thread	Sent: Thu 10/07/2021 4:14PM (EDT) To: Nurse
Űн	loward, Carole Medication Refill request Thu 10/07/2021 4:14P	Task: (Open)
🗉 Dat	e: Older	
🗎 Ma	il Thread	
() v	Vade, Alex Patient Test - Question Fri 03/06/2020 3:19PM	Patient called in with refill request for Percocet 5-325 mg. Preferred pharmacy is CVS on 5th street. Please call patient to confirm at 555-555-5555

4. Billing Portal - Claims

Cla	im #26856 for	Karei	n T3st	01/01/2	020 (2 [.]	1m)										
	Open 🝷 🔚	Save	- 🧯	🔊 Histo	ary 🔻	📩 Pay	ments 🔻	83	Patient 🔹							
	Status							2	Setup							
	Claim	2685	56 -						Insurance			T3st 🗸				
	.	Info		nted fro	n offic	_		2	Guarantor			99 x311{				
	Status	inio.	reques	sted iro	m onic	8	~	2	EMR Char	rt						
	Substatus						~	3	Comments	s		ation			Q	
	Level	Prim	nary	~	Billing	Electr	onic 🖌	9	History			rider			Q	
	Туре	Med	lical				~	t	Patient Eli	gibility					Q	
	Owner	Hov	vard, C	arole			Q	2	Patient Co	mmunications	Ռո	irance			Q	
	837	• P	rofessio	onal 🔵	Institu	tional		62	Office Cor	nmunicatione	U	nsurance			Q	
								٦	Reminders	S		vrance			Q	
									Appointme	ents			8	horizat	lion	
								7	Orders				er Aut	nonza		
*	Procedures	and	Diagr	ioses				Ø	Progress I	Notes						
	#	Servic	e Date		Pro	cedure	POS	DÊ	Accident/F	Rel. Cause				Mod	ifiers	_
	" From	1		То				-340-				Imount	1	2	3	

My Task - Orders

The My Tasks Orders section is used to process orders placed by the providers or ancillary staff. The primary purpose of this section is to manage the list of orders assigned to you and/or your assigned user groups, also known as the Processor. This list can be arranged based on the needs of each user. From the My Task Orders

you can Add Order Fulfillment Details, Print Requisitions, Input Authorization Details, change the status of an order and Search for Additional Orders.



Select an Order in the My Task List

Within the **My Tasks - Orders** there are two categories listed beneath the "**Open Orders**" heading, Open Orders and Unsolicited Labs. The Open Orders count displays Open orders in which your user is the Processor or a part of the Processor Group for that order.

Open Orders		
 Open Orders Unsolicited Labs 	99 11	
	۹. ۲ 🗄	• 👱 🎓 🚺
Arranged By: Processor		

Steps to Complete

1. Navigate to My Tasks - Orders



2. Select Open Orders

Open Orders				
 Open Orders Unsolicited Labs 	99 11			
	۹. ۲ 🗄	• 💆	10	s
Arranged By: Processor				

3. If you have not already done so, **set the Arranged By**. This will group orders for a more efficient workflow, i.e. if you will be processing orders for a particular provider, you can arrange by "Ordered by"

Open	Ord	ers
✓ Open Unsoli	Order cited	s 99 Labs 11
		۹ 🖬 🕨
Arrange	d Rv	Order Rv
E Case		Patient
🗄 Dao		Priority
🗄 Hea		Type
🗄 Kak		Order Date
🗏 Lait		Order By
🙎 ONI		Appointment Date
🙎 Tes		Processor 💌

4. Find the order in the displayed list. Click on the item and the details will be displayed in the viewing pane.

Open Orders						
 Open Orders Unsolicited Labs 	99 11					
	् 🗸 🔚 🔹 💆	r 🗘				
Arranged By: Processo	r					
🗉 eLabs						
🗄 Head, Chandler						
🗄 Nurse						
Office Staff						
🙎 Couchpotato, Jack	son Male Next Appt: N/A Age	e: 43y 09/15/1977				
Scheduling	Return to office ASAP	01/14/2021	9:38PM (EDT)	Stevens, Heather	Open	
🙎 Ford, Harrison (Ind	dy) Male Next Appt: N/A Age	: 71y 02/25/1950				
Scheduling	Return to Office - ASAP	02/25/2021	10:43PM (EDT)	Cassady, Wes	Open	i

Select Multiple Orders

From the list, you can either select and **right-click** over a single order or <u>select multiple orders</u> at once by using <u>SHIFT+Click</u> and/or <u>CTRL+Click</u>.

Print a Requisition from My Task Orders

A Requisition, the PDF containing the details of an order that has been placed, can be generated from either the My Task - Orders section or from the history section of Order Entry. This article describes the steps to print/transmit requisitions for one or more orders using the My Tasks List.

Steps to Complete

- 1. After Placing an Order in the Order Entry Chart Tab.
- 2. Navigate to My Task Orders



 From the list of Open Orders, you can either select and right-click over a single order or <u>select multiple</u> orders at once by using <u>SHIFT+Click</u> and/or <u>CTRL+Click</u>. Select Requisition (More Info On Selecting Orders)

Arrange	d By: Order	Date								
🖃 Date	: Three We	eks ago								
	Labs	CBC (INCLUDES DIFF/P	PLT)	08/11/2021	3:49PM (ED	DT)	Head, Chandler	Open	Head, Cha	Ì
🗉 Date	: Last Mon	th								
	Labs	Cholesterol, Total		07/30/2021	1:21PM (ED	DT)	Unfried, Ashley	Open	Nurse	
	Labs	CBC w Diff w Plt	н	Poquisition			Unfried, Ashley	Open	eLabs	(
	Labs	Comp. Metabolic Panel	֩r	Requisition	J		Infried Ashlev	Onen	eLabs	(
	Labs	PSA, Total	~	Status	Pr	rint	requisitions for select	ed orders	Office Staff	Ò
	Scheduling	Return to office in 2 we	Ē	Letter			Unfried, Ashley	Open	Office Staff	Ò
	Referrals	Cardiology Referral	0	Diagnosis			Unfried, Ashley	Closed	Nurse	 Ø
🗉 Date	: Older		ß	Сору						
	Labs	T3 Uptake		- · ·			Head, Chandler	Open	Office Staff	Ì
	Labs	Thyroxine (T4) Free, Di	164	Processing			Head, Chandler	Open	Office Staff	ø

4. The Create Requisitions screen will display the groupings for the order you are going to print and errors that may need to be resolved first.



 After selecting OK, the PDFs will be generated and you will be able to Fax the form, Add it to the Patient's Print/Fax Queue, or Print the requisition. If you have an Interface, this may transmit the order to the facility depending on the type of interface.



Open Patient in the EMR from My Task Orders

When processing orders via the My Task list, you may need to reference clinical information about the patient. You can open a patient's chart in the EMR from this section with the click of a button. This article describes these steps.

Steps to Complete

- 1. Navigate to My Task Orders
- 2. Select an Order

3. Once a single order has been selected, **Open Patient in the EMR** from the icon in the toolbar.

Open Orders	
✓ Open Orders Unsolicited Labs	99 11
	२ - 🗄 - 💆 🎓 🚺
Arranged By: Patient	2
В	
🙎 Balding, James (Baldy)	Male Next Appt: N/A Age: 21y 04
Labs Bas	sic Metabolic Panel (BMP)

Complete an Advanced Search for Orders

The My Task - Orders list will display all open orders assigned to your user as the processor and/or your assigned user group. In the event, you would like to search for orders outside of your queue you may perform an Advanced Search to return a list of orders that meet specific criteria.

'n						_
	2 🔍 🔫					
	Order # Requist	on #			Max Rows 25	
	Chart # Results		 Reviewed 		~	
	Order Name		Туре		✓ Electronic	
	Order Date		Reviewed Da	te	🔂 🔚 То	
	Route				Status	
	*DME -Home (DMERC) A1106 Lakeland Medical Center A1517 Lee Memorial Hospital A2243 Michiana Hematology A2255 St Joseph Regional Medical A2443 Pamida Pharmacy	Center	r		Open Closed Cancelled	
	A2611 Van Buren / Cass District Hea	alth De	ept	•	•	
	Created By	P	Processor		Reviewed By	
	Abraham, Vinu Armstrong, Anthony Auer, Kevin Cardio, Charles Cassady, Wesley Cavanaugh, Greg Charest, Michael David, Cleveland Dinn, Phil Distler, Chad Doran, Michael		Group Name *Unassigned Completed Communications eLabs Greenfield Laboratory Greenfield Pathology Greenfield Radiology Greenfield Scheduler Nurse Office Staff Technician		Cassady, Wesley Dinn, Phil Erickson, David Hall, Michael Head, Blake Hynes, MD, Patrick Kaiser, Adam Mcdonald, Jason Morales, Caron Norris, Drew Pepper, Dre Boland Kim	
	Friedly, Kevin	-	Administrator, Local	•	Test, Alex	
н.					A A A A A A A A A A A A A A A A A A A	

Steps to Complete

- 1. Navigate to the My Task Orders
- 2. Using the Search Field Dropdown, Select Advanced Search
- 3. Using the available criteria:
 - Order #
 - Chart #
 - Requisition #
 - Results
 - Reviewed
 - Order Name
 - Type
 - Electronic (Electronic Orders are those that have a connected interface)
 - Order Date From/To
 - Reviewed Date From/To
 - Route
 - Status
 - Created By
 - Processor
 - Reviewed By
- 4. Set your Max Rows to ensure your return the comprehensive list of results.

Max Rows	25

5. Once you enter your search criteria, select the Magnifying Glass icon from the toolbar.

2 9	
Order #	Execute search, using selected criteria
Chart #	Q Results

Complete Order Fulfillment Details via My Task - Orders

Depending on your practice's workflow, the Order Fulfillment template may be completed in the My Task Orders section by the processor as opposed to the individual who placed the order in Order Entry. This article will describe how to add and edit the details of order fulfillment on an open order.

Steps to Complete

- 1. Navigate to My Task Orders
- 2. Select an Order
- 3. If in the order you see the following, **select Add** to pull up the fulfillment template. If there is no option to add details, then there is no order fulfillment template tied to the selected order item.

🖺 🖶 🥢 🖴 🚠 🛤 🛛 🗸 🔚 🚭 🔇 📈 🎓

Cardiology Referral

Gumdrop, Billy

Male, Next Appt: N/A

Priority:	Normal.			
Appointment:	Referral at 02/02/2021 00:0	00am. 🦁		
Processor:	Nurse (<u>Open</u>)			
Rendering:	Cohen M.D., Sandra	Referring:	ICD:	I249
Responsible:	Gumdrop, Billy	Insurance:	Auth:	
Referral 1: Add	d کاپ سرا			

4. Once the template is displayed add/edit the details and select Close.

	Summary	
Dr. So and So; Indianapolis, /	VZ, 46204;	
D.		
→ ✓	Referral Details	
Name: Dr. So and So	Phone: Fax:	
Address:	City: Indianapolis State: AZ Zip: 46204	
Address:	City: Indianapolis State: AZ Zip: 46204	
Address:	City: Indianapolis State: AZ Zip: 46204	
Address: Duration of Stay: Dr. Zachary Smith	City: Indianapolis State: AZ Zip: 46204	
Address: Duration of Stay: Duration of Stay: Dr. Zachary Smith	City: Indianapolis State: AZ Zip: 46204	

5. Select Save



Change the Processor on an order via My Task - Orders

To change an order's processor you can complete this while placing the order, in the Order Entry - History, or My Task - Orders. This article explains the steps to complete this in the Order Entry - History chart tab. There are two ways to complete this task within Order Entry - History.

Steps to Complete (Right Click Menu)

1. Navigate to the Open Orders within the My Task - Orders.



- From the list, you can either select and right-click over a single order or <u>select multiple orders</u> at once by using <u>SHIFT+Click</u> and/or <u>CTRL+Click</u>.
- 3. Right-click over the selected order(s), Select Status

	Scheduling	Return to Office - ASAP		Requisition
	🗆 G			Status
	🙎 Gumdrop, Billy	Male Next Appt: N/A Age: 53y 06/18/	Ē	Letter
	Referrals	Cardiology Referral	0	Diagnosis
	Scheduling	Return to office in 3 months	Ŕ	Copy
	Referrals	ENT Referral		Send Communication
	Labs	Urine Culture, Routine		Create Reminder
	Labs	Basic Metabolic Panel (8)	Ð	
	Labs	Cortisol - AM	7	Open Patient in EMR
	Labs	Testosterone, Free and Total	Ē	Open Patient in Billing
	Labs	Alkaline Phosphatase, Serum	1	Open Patient Setup
	Labs	AST (SGOT)	1	Result Reporting
1	Labs	Cholesterol, Total		eDocuments
	Labs	Fola (Folic Acid), Serum		Patient Orders
	Labs	Testosterone, Free and Total		Custom
	Labs	Urine Culture, Routine		Comments
1	Labs	Cortisol - AM		Soloot Ordere
	Labs	Basic Metabolic Panel (8)		
	Labs	AST (SGOT)		Unselect Orders
1	Labs	Alkaline Phosphatase, Serum		Collapse All Groups
	Referrals	ENT Referral		Expand All Groups
1	99 Items		l	

4. From here, use the select list to change the **Processor.** You may also change the status of the selected order(s) from this screen.



5. **Save**

Steps to Complete (Processing Window)

1. Navigate to the Open Orders within the My Task - Orders.



2. From here, locate and select the order.

2	Flintstone, Fred Male Next Appt: N/A Age: 50y 10/01/19
	Scheduling 15 minutes
2	Ford, Harrison (Indy) Male Next Appt: N/A 😾 e: 71y 02/;
	Scheduling Return to Office - ASAP
	i de la constante de

3. Within the processing window, select Processor

🖹 🖶 🖉 🞽	1 🔬 📰 🧕 - 🗙	🖬 🚭 🖉 🖉				
15 minutes						
Flintstone, Fred					TEST	
Mala Next Apeta N	1/6				01/10/2021	
Male, Next Apple 1	WA .				01/19/2021	
Priority:	Priority: Normal.					
Appointment:	Appointment: Scheduling at 01/19/2021 00:00am. 🦁					
Processor:	Nurse (Open)					
Rendering:	MD, Stephanie	Referring:		ICD:		
Responsible:	Flintstone, Fred	Insurance:		Auth:		
-	-					

4. This will open a separate window where the processor can be changed via a Search Field

Assignment				X
Assign To	User or Group	Status	Open	~
Phlebotomist	User Q			
Collection	😂 📼 💉 🕶 pm			
Patient Instruc	tions:		2	
			~	~
				~
				Close



Change the Status of an Order via My Task - Orders

The order status is used to determine the visibility of the order in the My Task - Orders, Open Orders list. There are three options for order status: Open, Closed, Cancelled. This article will describe the two ways to change the status of an order item within My Task - Orders.

Steps to Complete (Right Click Menu)

1. Navigate to the **Open Orders** within the My Task - Orders.



- From the list, you can either select and right-click over a single order or <u>select multiple orders</u> at once by using <u>SHIFT+Click</u> and/or <u>CTRL+Click</u>.
- 3. Right-click over the selected order(s), Select Status



4. From here, use the radio buttons to change the Status to Open, Closed, or Cancel.



My Task - Superbill

The Superbill task list within the provider's My Task List displays outstanding or incomplete superbills that still need to be completed and/or submitted. The Superbill task list is unique to each individual provider and is based on user activity.

Navigating to the Superbill Task List

1. In the upper, left-hand corner of the database, navigate to the My Task List and select Superbill



2. The list will be broken down into two categories: Open and Missing

🔒 🝷 Task Superbill				
Superbill List	Π			
Open 1 Missing 153				
🗄 - 🙎 🥂 🎓 🖨 💋				
Arranged By: Patient				

- 3. **Open** = Superbills that have been saved but have not been released for charges.
 - Superbills can be in the Open category when a provider forgets to save the superbill or chooses to not release the Superbill upon saving.

Missing = Superbills that have not been started and/or saved.

- Superbills can be in the Missing category when the provider does not complete the Superbill for a visit. For example, if a patient is checked-out of their appointment, but the Superbill has not been completed the provider will receive a notification that the Superbill is Missing.
- 4. Select a category to generate a list of task items



5. Select the Date of Service below the patient's name to open the Superbill

🖞 • Task Superbill Choice 🗮					
Superbill List	🖶 🖺 🔇 🔛 🎓				
✓ Open 1 Missing 153	Superbill Addiction Behavior Superbill ICD10	~	Claim #	32287 Encounter * 11/11/20	021 ᅌ 📩
	Service Location * Franklin	~	Claim Status	Open - Electronic Superbill	×
Arranged By: Patient	Procedures			Diagnosis	
E T	Payment Plan	•		Problem List	•
	Procedures	•	√	Top Provider Diagnosis Codes	•
Iest, Alexandra Chart: 25015 Female 11/11/2021. Appual Physical Exa 11/11/2021.	Lookup	•		DIAGNOSIS CODES	•
Alindai Physical Lka				Lookup	•
U U					
	Charge Summary				
	Edit Charges		5		
	POS Code Unite Char		Amount	ž	1
		96	Amodit		
	L	Total =	\$0.00		

6. Complete the Superbill by adding any missing Procedure or Diagnosis codes

Superbill * Addiction Behavior Superbill ICD10		~	Claim #	32287 Encounter * 11/11/2021	
Service Location * Franklin		~	Claim Status	Open - Electronic Superbill	¥
Procedures				Diagnosis	
Payment Plan	•			Problem List	•
✓ Procedures	Δ	^	√	Top Provider Diagnosis Codes	•
Biopsychosocial	96150	11		DIAGNOSIS CODES	▼
Breathalyzer	82075			Lookup	•
Case Management	T1016				
ETG Alcohol Screen	90418	11			
Family	90834				
FEE FOR SERVICE	FFS				
Group	90853				
Individual 30min	90833 🗹				
Individual 45min	90834				
Individual TeleCounseling	90834-95				
IOP	H0015				
MAT Follow Up Visit	99212				
Physician Initial Visit	99202				
Pre-Admission Assessment	99408	Ч			
Pregnancy Test	81025				
PSYCH	99213				
PSYCH	99214				
PSYCH	99204				
PSYCH	99205	×			
Psychiatric Evaluation	90792				
Charge Summar	у		_		
Edit Charges					
DOS Code	Units Charge		Amount	D61	₩=
Copy Delete 11/11/2021 90833	1 \$0	.00	\$0.00		
					-
Total = \$0.00					

7. Select Save



8. When prompted if you wish to release the Superbill, select Yes

90833 EMR Superbill Webpage Dialog		>	<
Do you wish to release this	superbill for cha	arges?	
	Voc	No	
-	Tes	<u>N</u> O	

9. Completed items will be crossed off the to-do list

🔒 🔹 Task Superbill
Superbill List
✓ Open 0 Missing 153
🗄 • 👤 🥕 🎓 🖨 🚺
Arranged By: Patient
∃ T
👤 Test, Alexandra Chart: 25015 Female
11/11/2021 - Annual Physical Exa

My Task - SOAP Notes

The SOAP Note task list within the provider's My Task List displays outstanding or incomplete SOAP Notes that still need to be completed and/or submitted. The SOAP Note task list is unique to each individual provider and is based on user activity.

Navigating to the SOAP Note Task List

1. In the upper, left-hand corner of the database, navigate to the My Task List and select SOAP Notes



2. The list will be broken down into two categories: Open and Missing



- 3. **Open** = SOAP Notes that have been saved but have not been signed-off.
 - SOAP Notes can be in the Open category when a provider starts the documentation and *saves* the SOAP Note, but does not officially sign-off.

Missing = SOAP Notes that have not been started and/or signed-off.

• SOAP Notes can be in the Missing category when the provider does not complete the SOAP Note for a visit. For example, if a patient is checked-out of their appointment, but the SOAP Note has not been completed the provider will receive a notification that the SOAP Note is Missing.

4. Select a category to generate a list of task items

☐ ▼ Task SOAP Notes				
SOAP Notes List				
✓ Open 4 Missing 323 □ ✓ ✓ ✓				
Arranged By: Patient				
 foofoo, kayleigh Male Age: 31y D 04/18/2018 CCM Care Plan 				
⊟н				
Head, Blake A. Male Age: 32y DC 04/03/2018				

5. Select a date of service below a patient's name to generate the SOAP Note

SOAP Notes List						
✓ Open 4 Missing 323	PIN Fax Letter (Base SOAP au	ito populate) 🗸	CCM Care Plan	✓ 🛓		
🗄 - 👤 🥂 🎓 🖶 💭	Tr 🗛 🛆 🔗 🖪 I 😃 Ŧ 🦻 💠	💿 🗘 🔳 🖻	Re-Populate Note			
Arranged By: Patient						
E f			0			
SOAP Notes Type: CCM Care Plan Coofco, kayleigh Male Age: 31y D	Subjective					
04/18/2018 CCM Care Plan				\sim		
■ H	Allergies					
Head, Blake A. Male Age: 32y DC 04/03/2018	Acesulfame I atox: rash					
E T						

6. The provider may enter their pin number and select **Save** in order to sign-off on the note.

PIN ••••	(Base SOAP auto populate)				
Тт Аа <u>А</u> 🔗 В І	U T 😽 💠 💿 🗘 🔳				
M M M M → C					

Subjective

Allergies

7. Completed notes will be crossed off of the to-do list.

SOAP Notes List		
✓ Open 3 Missing 323	3	
🗄 • 👱 🥕 🎓 🖨	s	
Arranged By: Patient		
🗉 f		
🙎 foofoo, kayleigh Male Age: 31y D		
04/18/2018 CCM Care Plan		
Η		
~		

Best Practice: In the event that the provider is not ready to sign-off on the note, they may open the note in the EMR to complete any changes.

- 1. Begin by selecting the date of service under the patient's name
- 2. Then navigate to the provider icon (person in the white lab coat)

SOAP Notes List				
✓ Open Patient in EMR Missing	3 323			
Arranged by Patient				
ΞH				
Head, Blake A. Ma	ale Age: 32y DC			
04/03/2018				

The patient's chart will open to the date of service where the note is either open/missing. This will allow the provider to add additional documentation, make changes, and sign-off on the completed note.

My Task - eDocument

The eDocuments Task List display a list of electronic documents needing additional review. Users may be sent documents to review either via scanned, imported, or faxed documents.

Navigating to the eDocuments Task List

1. In the upper, left-hand corner of the database, navigate to the My Task List and select eDocuments



2. The list will be broken into two categories: Pending Review and Reviewed (last month)

☐ ▼ Task eDocument Review
Document Review List
Pending Review 1 Reviewed (month) 0
Arranged By: Patient

Pending Review = eDocuments that are awaiting final review

Reviewed (Month) = eDocuments that have already been reviewed within the last month

3. Select a category to generate a list of task items



4. Select the Date of Service below the patient's name to open the pending eDocument

🔒 🔹 Task eDocument Review		(Choice 🗮	
Document Review List	😑 🖺 💝 🖽			Test, Alexandra (25015) Born 01/01/2001
Pending Review 1 Reviewed (month) 0	≡ fax_compressed.tiff		1 / 2 - 125% + 🗄 🕎	
Arranged By: Patient	Fin:Allex Wade at 61	53568011 To:Alexandra Wade (1317	(2753358)	11:46 07/31/20 ET Pg 1-2
E T				
🙎 Test, Alexandra Female Age: 20y DOB: 01/01/2001 Next Appt:				
08/18/2020 test doc test				
Message: test doc				
		FAX		
		.,		
		TO: Alexandra Wade	FROM: Alex Wade at 6	53568011
		FAX NUMBER:	DATE:	
		13172753958	Jul 31, 2020	
		RE:	TOTAL NO. OF PAGES INCLUE	ING COVER:
		Test	2	
		X URGENT FOR REVIEW	PLEASE COMMENT PLEASE REPLY	INFORMATIONAL
1				

5. Once the document has been reviewed, **right click** over the Date of Service to display a list of document functions

G Task eDocument Review					
Document Review List					
✓ Pending Review 1 Reviewed (month) 0					
Arranged By: Patient					
⊟т					
2 Test, Alexandra Female Age: 20y DOB: 01/01/2001 Next Appt:					
08/18/2020	Mark as Reviewed				
	Needs Reviewed By				
	Review Comments				
	Send Communication				
p					
2	C Open Patient EMR				
4	Open Patient Billing				
Ê	Open Patient eDocs				
	<u>C</u> ollapse All Groups				
	Expand All Groups				

6. To close the task, select Mark as Reviewed
| 🔒 🗸 Task eDocument Review | | | | | | | |
|-------------------------------------|------------------|--------------------------------|--|--|--|--|--|
| Document Review List | | | | | | | |
| ✓Pending Review
Reviewed (month) | 1
0 | | | | | | |
| 🗄 🛛 💆 🛢 🖨 💭 | 5 | | | | | | |
| Arranged By: Patient | | | | | | | |
| ⊟т | | | | | | | |
| 👤 Test, Alexandra Female A | Age: | 20y DOB: 01/01/2001 Next Appt: | | | | | |
| 08/18/2020 test | dar. | Mark on Davieward | | | | | |
| | Mark as Reviewed | | | | | | |
| | 2 | Needs Reviewed By Completed | | | | | |
| | | Review Comments | | | | | |

7. Users may add comments to the completed task, otherwise select Completed and then OK

T	2	Task eDocument Review					
	D	ocument Review List					
ľ	1	Mark as Reviewed				X	
Review History							
	Δ	P Date	Status	By	For		CX.
	E	test fax.pdf 08/18/2020 1:17PM (EDT) test doc	Pending Review	Wade, Alex	Wade, Alex	^	
h	1	08/18/2020	Review Created	Wade, Alex	Wade, Alex		
		My Comments				Ŧ	
l		Results look good, no follow-up needed.				*	
l							-
							ra
							53
						-	_
					Completed	ОК	
l						<u> </u>	

8. Completed items will be crossed off the to-do list

G ← Task eDocument Review	
Document Review List	
✓Pending Review 0 Reviewed (month) 0	
Arranged By: Patient	
ПΤ	
👤 Test, Alexandra Female Age: 20y DOB: 01/01/2001 Next Ap	pt:
_ 08/18/2020 _ t est doc	test ·
<i>G</i> [−]	

My Task - Patient Portal

All communications from MyMedicalLocker will display in this To Do list including Secure Communications,

Patient Intake submissions, Shared Documents, and Appointment Requests.

To access this screen, navigate to the My Tasks section of the application.



Pending Review

The Pending Review bucket is a list of pending portal messages that have not been processed.

🔒 - Task Patient Portal Re	eview	
Patient Portal Review		
✓ Pending Review 9		
Reviewed (month) 1		
Arranged By: Date		
🗉 Date: 3 Weeks Ago		
👤 T3st, Benjamin (Ben) Male Ag	e: 44y DOB: 08	3/11/1976
Document Share	05/24/2021	11:39AM (EDT)
🗆 Date: Older		
🙎 T3st, Joseph L. (JJ) Male Age:	23m DOB: 06	/25/2019
Message	04/21/2021	1:03PM (EDT)
1 Demographics Import	06/18/2020	6:15PM (EDT)
🙎 Test, Brian Male Age: 31y DO	B: 10/15/1989	
⊑ Intake Form	04/07/2020	9:14AM (EDT)
😌 Test. Candice L. Female Age:	37v DOB: 06/1	9/1983

Pending requests can be arranged by Date, Patient, Request (type) or Provider



Click on the message to display list of available actions

<u>Appointment Request</u>

ACTIONS: Print – Save - Response back to patient - Mark as Reviewed - Patient Index - Open Patient in iScheduler

r									
l		Mark as Reviewed							
I	Appointment Request								
1	Deborah T3st								
	Sent: 01/15/2020 3:41PM (EDT)								
1	To: ENT Sandbox								
	Provider:	Christing Dows							
	Trovider.								
	Patient:	Deborah T3st							
l	Reason:	sick visit							
1	100001								
)	Timeframe:	Tomorrow							
	Preferred Days:	Monday, Tuesday, Thursday, Friday							
	Preferred Time:	8am - 10am							
	Most Important:	Time of Day							
	Reached At:	(205) 542-9078							

• Intake Form – forms completed on portal to be merged Intake Form

ACTIONS: Import Patient Info - Mark as Reviewed - Patient Index



• Document Share – documents uploaded by patient 📄 Document Share

ACTIONS: Print - Import - Mark as Reviewed - Patient Index



<u>Message</u> – secure message sent by patient <u>Message</u>

ACTIONS: Print - Save - Reply - Mark as Reviewed - Patient Index - Communication



• Demographics Import - completed as part of intake

ACTIONS: Print- Import- Patient Index



Reviewed (month)

The Reviewed (month) bucket is a list of portal messages that have been reviewed in the previous month.

	Patient Portal Review			
	Pending Review 10 V Reviewed (month) 1			
	Arranged By: Date			
🖃 Date: Last Week				
	👤 T3st, Joseph L. (JJ) Male Age: 24m DOB: 06/25/2019			
	✓ Message 06/23/2021 2:14PM (EI			

My Task - Fax UpDox

Overview of My Task - Fax (UpDox)

The My Tasks Fax (UpDox) portal is used to manage electronic faxes that are sent to your practice. This portal allows you to see new faxes received for numbers that have been assigned to you. Once received, you will use this queue to manage these faxes. Also, users can access the sent box for faxes here as well.

🔒 🔸 Task F	ax Updox				Neighborhood Physicians Practice 📃	Ö 👭 🖻 🔒 🔕
Туре	Count			<<	I Save eDocs Send Communication X Delete	
Inbox	23			^	Te: 49470987440 Dec: 4.40 0994 05 05 00 007 V-V-V-U-U-U-	From OERT and AD around CO
Sent Items	0 (to	oday)		~	10. 151/000/145 Page 1 012 20214040 0030/30 PUT 1010 kitsching	FIDM: GERT ENVIAGE ACOUNT
	200				To: ***	
Received From	Sent To	Posted (MDT)	Filonamo		Subject: This is a fax test	
(317) 406-4255	(317) 680-7149	05/10/2021 12:30PM	fax-442712.pdf			
(317) 406-4255	(317) 680-7149	05/06/2021 6:26AM	fax-442041.pdf	^	Unont	
(317) 406-4255	(317) 680-7149	05/05/2021 1:20PM	Tax-441960.pdf		orgent.	
(317) 400-4255	(317) 080-7149	05/05/2021 7:50AM	T0X-441809.p0I		Review:	
(613) 248-4872	(317) 680.7149	05/05/2021 7:00AM	fax-441855 ndf		Comment:	
(317) 406-4255	(317) 680.7149	05/04/2021 2:07PM	fax_441794.ndf		Renly: X	
(317) 406-4255	(317) 680-7149	05/04/2021 1:53PM	fax-441790 pdf		lafa X	
(317) 406-4255	(317) 680-7149	05/04/2021 1:39PM	fax-441786.pdf		Inte. A	
(317) 406-4255	(317) 680-7149	05/04/2021 12:43PM	fax-441771 pdf			
(317) 406-4255	(317) 680-7149	05/04/2021 12:43PM	fax-441770.pdf		Message: user setting message	
(317) 406-4255	(317) 680-7149	05/04/2021 11:18AM	fax-441744.pdf			
(317) 406-4255	(317) 680-7149	05/04/2021 9:54AM	fax-441712.pdf			
(317) 406-4255	(317) 680-7149	05/04/2021 9:40AM	fax-441706.pdf			
(317) 406-4255	(317) 680-7149	05/03/2021 12:48PM	oemfax.pdf			
(317) 406-4255	(317) 680-7149	05/03/2021 12:47PM	fax-441571.pdf			
(317) 406-4255	(317) 680-7149	05/03/2021 12:47PM	fax-441570.pdf			
(317) 406-4255	(317) 680-7149	05/03/2021 12:33PM	fax-441566.pdf			
(317) 406-4255	(317) 406-4251	04/27/2021 8:11AM	oemtax.pdf			
(317) 400-4255	(317) 400-4251	04/20/2021 11:53AM	oemiax.pdr			
(317) 400-4255 (217) 408-4255	(317) 400-4251 (217) 408-4251	04/20/2021 11:52AM	oemfax.pdf			
(317) 400-4255 (317) 408-4251	(317) 400-4251 (317) 408-4255	04/20/2021 11:13/4W	fax_435897.ndf			
(011) 400 4201	(011) 400-4200	OF COLUMN THE FRAME	inter-rocourt-pair			
			2			
				~		
<				>		
23 items				< 1 of 1 >		~
				. 1011 /		

My Task Fax (UpDox) Inbox

Last Modified on 05/11/2021 3:36 pm EDT

The Inbox within the Fax (UpDox) My Task lists provides a user with a queue of faxes that have been sent to a fax number that the logged-in user has access to. From this Inbox, users will be able to make a decision on what to do with each fax that has been received. Users may decide to send the fax as a communication, send the fax to a patient's chart, or delete the fax. This article describes how to complete these various tasks.

Inbox List

The Fax Inbox will contain a list of faxes that have been sent to a fax number that you have been assigned to. The list will contain the following details:

- Received From: This is the fax number that sent the fax to you.
- Sent To: This is the fax number that the fax was sent to.
- Posted: This is the date/time that the fax was received.
- Filename: This is the name of the file that was sent.

🔒 🔹 Task	Fax Updox				
Туре	Count			<	<
Inbox	23			-	
Sent Items	0 ((today)		~	/
317 406	Q 🔗 🖸)			
Received From	Sent To	Posted (MDT)	Filename		
(317) 406-4255	(317) 680-7149	05/10/2021 12:30PM	fax-442712.pdf		
(317) 406-4255	(317) 680-7149	05/06/2021 6:26AM	fax-442041.pdf	^	
(317) 406-4255	(317) 680-7149	05/05/2021 1:20PM	fax-441960.pdf		
(317) 406-4255	(317) 680-7149	05/05/2021 7:56AM	fax-441869.pdf		
(317) 406-4255	(317) 680-7149	05 <u>/05/2021 7:00AM</u>	fax-441856.pdf		
(317) 406-4255	(317) 680-7149	05 05/04/2021 12:43	3PM-441794.pdf		
(317) 406-4255	(317) 680-7149	05/04/2021 1:53PM	fax-441790.pdf		
(317) 406-4255	(317) 680-7149	05/04/2021 1:39PM	fax-441786.pdf		
(317) 406-4255	(317) 680-7149	05/04/2021 12:43PM	fax-441771.pdf		
(317) 406-4255	(317) 680-7149	05/04/2021 12:SPM	fax-441770.pdf		
(317) 406-4255	(317) 680-7149	05/04/2021 11:18AM	fax-441744.pdf		
(317) 406-4255	(317) 680-7149	05/04/2021 9:54AM	fax-441712.pdf		
(317) 406-4255	(317) 680-7149	05/04/2021 9:40AM	fax-441706.pdf		
(317) 406-4255	(317) 680-7149	05/03/2021 12:48PM	oemfax.pdf		
(317) 406-4255	(317) 680-7149	05/03/2021 12:47PM	fax-441571.pdf		
(317) 406-4255	(317) 680-7149	05/03/2021 12:47PM	fax-441570.pdf		

Inbox Search

Users will be able to use the Search box at the top of the inbox to search for an item in the inbox. You can search by any of the fields described above. Simply type in the details and click the search icon.

🔒 🔹 Task F	ax Updox	
Туре	Count	
Inbox	23	
Sent Items	0 (t	oday)
317 406	x 🔍 🔗 🚺	
Received From	ന്ന Sent To	Pos
(317) 406-4255	(317) 680-7149	05/1
(317) 406-4255	(317) 680-7149	05/0
(317) 406-4255	(317) 680-7149	05/0

Inbox Work Area

By selecting a fax from the Inbox List, that fax will be displayed to the right in the Inbox Work Area. This is where you will be able to take action on an item from your inbox.

Save to eDocs

The Save to eDocs feature allows a fax to be stored into the eDocuments portion of the application. Most commonly, eDocs are associated with a patient. However, other types of documents can be stored here as well. The system supports documents related to specific resources, payers, or the company as a whole.

- 1. Select the fax from the Inbox List
- 2. Click Save to eDocs



- 3. Complete the Save to eDocs settings:
 - 1. For the Following: Based on your selection here, the search and folder navigation will change.
 - 1. Patient Allows the document to be stored at the patient level.
 - 2. Practice Allows the document to be stored at the practice level.
 - 3. Resource Allows the document to be stored at the resource level.
 - 4. Payer Allows the document to be stored at the payer level.

5.

- 2. <u>Search</u>: Based on the type of document you are saving, you will be able to search for that entity as needed.
- 3. <u>Under this Folder</u>: Based on the type of document you are saving, you will see the pre-defined folder structure for that type. Select the Cabinet, Drawer, and Folder you wish to save this document to.
- 4. <u>To Be Reviewed By</u>: By selecting a user to user group from this list, this document will be assigned to the appropriate individual within the My Task eDocuments list.
- 5. <u>Review Message</u>: If sending a document to a user for review, this comment will accompany that review request.

Sa	ive to	eDocuments		x
Mo	ove the	following documents		To be Reviewed By
	# 29	Document Name fax-442041.pdf	Size	Groups better biller cccccc eLabs Electronic Labs hello
Fo E Ur	Search for nder this	Ilowing Patient Practice of for Patient V	○ Resource ○ Payer	HIE Nurse Office Staff Other Provider - Physician
	<naviga< p=""> The first New Cha Insu Res Lab</naviga<>	ate to folder to select> apy Notes cabinet Cabinet rts rance ponsible Party Results	^	RxRefills Technician Unsolicited Results ype Users Badiola, Liza (leza) Barnes, Brooke (lbbarnes)
	X-Ra Con Lette ITB bsk_ testt Prive drav	ays, MRIs, etc. sents Pump testing osk ate	~	Review Message
R	eceived	Date	Normal Prio	rity OK Apply Cancel

- 4. Click OK.
- 5. The item will be removed from your inbox.

Send Communication

The Send Communication feature allows a fax to be sent as an attachment to a user via My Tasks -Communications. When doing this, the fax is not permanently saved into eDocuments.

- 1. Select the fax from the Inbox List.
- 2. Click Send Communication



3. A new communication window will appear with the fax automatically attached. **Complete the communication information and click Send or Task.**

Ne	w Message
	🛿 Send 🛛 😇 Task 😓 Normal Importance 🔹 🖉 Attach 📃 Mark as Completed
	То
Su	bject Received Fax
Att	ached ReceivedFax.pdf
1	

4. The item will be removed from your inbox.

Delete

The Delete feature allows a fax to be permanently deleted. This is most commonly used for "junk" faxes that are not needed.

- 1. Select the fax from the Inbox List.
- 2. Click Delete



- 3. Confirm that you would like to delete the message.
- 4. This item will be removed from your inbox and permanently deleted.

MyTask Fax (UpDox) Sent Items

The Sent Items within the Fax (UpDox) My Task lists provides a user with a list of faxes that have been sent out by the practice for the fax number that the logged-in user has access to. From this Sent queue, users will be able to see the status of faxes sent and re-send faxes that failed.

Sent Items List

The Fax Sent Queue will contain a list of faxes that have been sent out for fax number that you have been assigned to. The list will contain the following details:

• Status: The status of the sent fax

- Success A green checkmark icon will be displayed to indicate the fax was successfully sent.
- <u>Retrieve</u> A download icon will be displayed to indicate the fax status has not been updated. Clicking this will retrieve the most current status.
- <u>In Process</u> A clock icon will be displayed to indicate the fax is in the queue to be processed. Click this will retrieve the most current status.
- Error A red circle with an exclamation point will be displayed to indicate the fax failed.
- Sent To The name of the recipient that received the fax.
- Fax # The fax number that the fax was sent to.
- Subject The subject line for the fax.
- Posted The date the fax was sent.
- Chart # The chart number for the patient associated with the fax.

≙ •	Task Fax Updox					
Туре	Count					<<
Inbox		23				^
Sent Ite	ems	0 (today)				$\mathbf{\mathbf{v}}$
	9	S (
Status	Sent To	Fax #	Subject	Posted (MDT)	Chart #	
~	***	(317) 680-7149	This <mark>is a fax test</mark>	05/10/2021 12:28PM	311786	
×	***	(317) 680-7149	This is ahiskiseatfax test	05/06/2021 6:15AM	311322	^
×	大大大	(317) 680-7149	This is a fax test	05/05/2021 1:05PM	311322	
P	***	(317) 680-7149	This is a fax test	05/05/2021 7:46AM		
\bigcirc		(317) 680-7149	This is a fax te	05/05/2021 6:45AM	10458	
×	大大大	(317) 680-7149	This is a fax test	05/04/2021 1:57PM	10495	
×	Smith MD, Maria N.	(317) 680-7149	This is a fax test	05/04/2021 1:39PM	10495	
× .	Smith MD, Maria N.	(317) 680-7149	This is a fax test	05/04/2021 1:34PM	10495	

Sent Items Search

Users will be able to use the Search box at the top of the sent items list to search for an item in the inbox. You can search by any of the fields described above. Simply type in the details and click the search icon.

⊢ Task Fax Updox							
Туре	Count						
Inbox	23						
Sent Items	0 (today)					
317 406	× 🔍 🔗 🕻	j.					
Received From	Sent To	Pos					
(317) 406-4255	(317) 680-7149	05/1					
(317) 406-4255	(317) 680-7149	05/0					
(317) 406-4255	(317) 680-7149	05/0					

Sent Items List Work Area

By selecting a fax from the Sent Items List, that fax will be displayed to the right in the Sent Items Work Area. This is where you will be able to take action on an item from your sent box.

Resend Fax

The Re-Send Fax feature allows a fax to be re-sent as needed. This is especially helpful if the fax does not send successfully the first time.

- 1. Select the fax from the Sent Items List
- 2. Click Resend Fax.



3. Complete the Fax Details.

Send Fax				×
Fax	To the following	#'s		
S Description Size	Click to enter co	ntact search informati	ion	Q 🗸
SentFax-108.pdf	Display 10 of 10	rows	Create	Contact
^	Number	Contact Name	Туре	
	(317) 449-0409	***	Updox	
	(317) 451-5357	***	Updox	^
•	(317) 516-0907	***	Updox	
	(317) 680-7149	***	Updox	
Cover Page	(317) 857-1613	***	Updox	
From * YoYo kirschling (317) 406-4255 👽	(317) 406-4251	***Fax Test #1	Updox	
	(317) 406-4255	***Fax Test 55	Updox	\sim
Subject This is a fax test	(317) 516-0906	***Lab	Updox	
Urgent Review Comment V Reply V Info	Recipient(s) *	Add	Delete	
Message user setting message	Number	Contact Name	Туре	S
	(317) 680-7149	Audubon Plaza	Location	^
· · ·				~
	-		Send	Cancel

4. Click Send.

Send Communication

The Send Communication feature allows a fax to be sent as an attachment to a user via My Tasks - Communications.

- 1. Select the fax from the Inbox List.
- 2. Click Send Communication



3. A new communication window will appear with the fax automatically attached. **Complete the communication information and click Send or Task.**

New Message	×
🔄 Send 🛛 😇 Task 😔 Normal Importance 🔹 🖉 Attach 📃 Mark as Completed	
Е то	
Subject Received Fax	
Attached ReceivedFax.pdf	
I	

iScheduler- Resource vs. Group View

The iScheduler can be viewed by individual Resource or a Group.

Navigate to iScheduler

💥 Setup
Reports
💆 EMR
iScheduler
🗓 Billing
eDocuments
Desktop

Select Resource or Group



Resource View

Select the Resource dropdown to display list of available Resources for that user.



The iScheduler displays a full week for the selected Resource

Schedule List «	<u></u>	iScheduler		- A		Choice Trainin	ng 🚍		Test Testu	Rep 04 Jan 2020(47m) (2	Al 🎓 🔒 🥹
Communication (0)	0	June 27 th - July 3 rd , 2021	Search Recall [_] Intake Schedule [_] Patient	re Help					Test, Testy	Search for Patient	Q v
Corders (11)		Smith Dr, Robert (0)	Smith Dr, Robert (1)	Smith Dr, Robert (1)		Smith Dr, Robert (0)	Smith Dr, Robert (1)	Smith Dr,	Robert (0)	Smith Dr, Robert (0)	
Results (0)		27 Sunday	28 Monday	29 Tuesday		30 Wednesday	1 Thursday	2	Friday	3 Saturday	
Progress Notes (15)	15				15						
eDocuments (0)	30				30						^
Prescription (0)	-				45						
Reminder (0)											
Eligibility (0)	12pn				12pm						
Faselik Ponal (10)	15				15						
NYSED (0)	30				30						
Dop Health (0)	40				45						
CoverMyMeds	100				1pm						
huma 2024	-				15						
Su Mo Tu We Th Fr Sa		1									
30 31 1 2 3 4 5					30						
6 7 8 9 10 11 12		5		Greensboro Office	45						
20 21 22 23 24 25 26			T3st, Jack General Hospital	Pre-Op	2pm						
27 28 29 30 1 2 3	1	5	Follow Up 6 mos		15	CINK to add appointment	Test, Testy			1	
_	I 7				30	0	CTS Office			11	
Resource 2	-				45		NP WHEETERTal				
Howard, Carole L.	<u> </u>				-					1	
McGil MD. Julie M.	3pm				30m						
McJunkins	12	5			15						
Pain Dr., Robert	30				30						
Provider MD, Ward Rasmussen MD	42	5			45						
Seals, Danielle	Apm				Apm						
 Smith Dr, Robert 	Ĩ.,				15		11				
Smm, Talis	-										
Walker MD, Adam	-	·									

Group View

Select the Group dropdown to display list of locations or Custom group



The iScheduler displays appointments for any Resource with appointments or appointment Placeholders for that location for the selected day

My Tasks 🌼	🔽 To	lay 😇 Time Period 🛛 🗔 Search Open 🛛 🔔 Search Recall 🔚 Intake Schedul	e 🛃 Patient 🔹 🎓 Help 🔹			
Communication (0)	0	Lune 20th 2024				
Health Exchange (0)		June 30, 2021				
K Orders (11)		McGill MD. Julie M. (1)	Pain Dr., Robert (1)		1	Smith Dr. Robert (1)
Results (0)						
Superbill (0)	11000	30 Wednesday	30	Wednesday	TI-STATE A	30 Wednesday
Progress Notes (15)						
eDocuments (0)						
Prescription (0)	30				30	
Reminder (0)	45				45	
Eligibility (0)						
Patient Portal (10)	11 ^{em}			1	1.00	
) Fax (0)	15				15	
NYSED (0)	30				30	
Rop Health (0)						
CoverMyMeds	- 40				40	
A hung 2021	12pm			1	2 ^{pm}	Click to add appointment
Su Mo Tu Wa Th Er Sa	15				15	
30 31 1 2 3 4 5	-				- 20	
6 7 8 9 10 11 12						
13 14 15 16 17 18 19	45				45	
20 21 22 23 24 25 26	1pm			1	pm	
27 28 29 30 1 2 3	10				15	
					_	
Resource 🕆	- 30				30	
Pain Dr., Robert	45				45	
Provider MD, Ward				2		
Rasmussen MD,	2°			2	_	
Smith Dr. Debort	15				15	
Smith Talis	30				30	
Group 🏠	45		Test, Patient		45	Test, Testy
омік поэрнаї		Test Defeat	Greensboro Office			Make sure referral is received
ENT Lotedo West	3pm	Greensboro Office		3	pm	NP W/Referral
Constantion S - West	15				15	
✓ Greensboro Office	30				30	
Hille Hospital						
	45				- 45	

Custom Group View

On-The-Fly allows you to select one or more Resources for the selected day



Daily Schedule displays all Resources for the selected day

My Tasks Today III Time Period I Search Open Search Recall I Intake Schedule II Patient Heip Heip Heip Heip Heip Heip Heip Hansen MD,	iy
Communication (0) Health Exchange (0) Orders (11) Results (0) Grogen MD, ChangeMe ChangeMe ChangeMe ChangeMe Dews MD, Grogan MD, Hansen MD,	y
Health Exchange (0) Groups (11) Results (0) Hansen MD, Hansen	iy
ChangeMe (0) ChangeMe ChangeMe ChangeMe ChangeMe ChangeMe Dews MD, Grogan MD, Hansen MD, Hansen MD,	зу
Results (0) Changeme (v) Changeme Chang	ay _
	ay
Superbill (0) 30 Wednesday	_
Progress Notes (15)	
eDocuments (0)	
Prescription (0) 2 ^{pm}	s
Reminder (0) 15	~
C Eligibility (0)	-
Patient Portal (10)	
Fax (0) 45	
Hansen's Hansy Face	s
Pop Health (0) 15	
CoverMyMeds	2
Su Mo Tu We Th Fr Sa 45	
30 31 1 2 3 4 5 gpm	
45	
Resource	
Pain Dr. Robert 15	-
Provider MD, Ward	
Rasmussen MD,	
Seals, Danielle 45	
Smith Tais 6pm	
Group 15	-
Hills Hospital	
Nicole Lewis 45	
	_

iScheduler Toolbar

The iScheduler Toolbar is located in the iScheduler portal, at the top left of the screen.

ć	🔒 🔸 iSchedu	ller						
Ŀ	🗾 Today 🖶 Tim	e Period 🔽 Search C	Open 🛛 🔔 Search Rec	all 📻 Intake Schedule	🔄 Patient 🔻 🎓 Helj	p 🔻		
ľ	C S May 30 th - June 5 th , 2021							
	Smith Dr,	Robert (0)	Smith Dr	r, Robert (0)	Smith Dr,	Robert		
L	30	Sunday	31	Monday	1			

Today: You have the ability to move to a future or past date in the iScheduler. Click Click to navigate back to the current date.

2. Time Period : Select to navigate to a future date based on days, weeks, months or years.



 Search Open: Select to search for open appointments based any combination of Resource, Location, Length, Appt Type within designated time period. To filter by Appt Type, resource needs to be associated with that Appt Type in Resource set-up. Click Search to display results.

A - iScheduler								
🔽 Today	🕂 Time Period 🔽 Search Open 🔔 Search Rec	all						
Resource Smith Dr, Robert								
Location	Location Hills Hospital							
Length	1 hour 🗸							
Appt.Type	ppt.Type 🛛 🗸 🗸							
Period *	2 O Days O Weeks O Months O Years							
Plus/Minus	7 days Clear Search							
Open Appointments O Date Resource Location								

- 4. Search Recall: You can add a new Recall or search Recalls from the Search Recall screen.
- Add New Recall: A new recall can be added for future appointments you aren't ready to schedule. Click on New and enter the details, then select OK

🔒 🗧 iSched	luler							
🔽 Today 🖽 T	ime Period 🗖 Searc	h Open \mid 🔔 Sea	arch Recall 📻 Inta	ke Schedule 🗜	atient 🔹 🎓 Hel	p •		
Recall Setup		-				х		x
Patient			Comments				mary ID	~
Patient *	Test, Patient		1 Year Follow-Up				lue	
Chart	9328 DOB	07/19/1975		Ι			Search	Clear
Home Phone	(888) 280-6678 Ext							0-60
Work Phone	Ext					Ť	Status Home	ROW U OT U
Recall Details								^
Appointment 1	Type Established Patie	nt Visit 🛛 🗸	Resource	Smith Dr, Robert		~		
Due Date	• 06/22/2022		Date Created					
Recall Status		~	Appointment Date					
				<u>o</u> ĸ	<u>C</u> ancel	Apply		
				J				
								\sim
<			_					>
			1					
New	Open Open Patie	ent Schedule	Letters			~	Print Letter	Close

• **Search Recall**: You can search for a previously added Recall by clicking Search Recall and entering your criteria, i.e. Resource, Begin and End Date, then select Search

- ⊡	iSche	eduler							
🔽 Too	day 🖶	Time Period 🔽 S	earch Open 🛛 🔔 S	earch Recall	Intake Schedule	其 Patient 🔹 🎓	P Help 🔻		
🛕 Re	call Li	st							x
Char	t#		Last Name			Begin Date		Primary ID	~
Statu	IS		First Name			End Date 06/30/2	2022	Value	
	-		Resource			Ma	x Rows	25 <u>S</u> ea	rch Clear
= \$	earch I	Results	Defined Object	LastName	First Manua	. Deserves News	Due Dete	Clatur	Row 0 of 4
	Sel	Appointment Date	Patient Chart	Last Name	First Name	A Resource Name	Due Date	Status	Home Phone
2	븝		9392	Lion	Colby	Howard, Carole L.	03/31/2021	Recall	(865) 655-6565
3			9336	T3st	Staci		06/18/2020	Recall	(205) 555-9999
4			9328	Test	Patient	Seals, Danielle	12/02/2020	Recall	(888) 280-6678
		ط _ا							~
<									>
_									

- Open: Select Open to view the recall created for that patient
 - New Open Open Patient Schedule
- Open Patient: Select Open Patient to open Patient Setup for selected patient

<u>N</u> ew <u>O</u> pen	Open Patient	Schedule
--------------------------	--------------	----------

• Schedule: Takes you to iScheduler to schedule selected patient from list.

New Open	Open Patient	Schedule
----------	--------------	----------

• **Print Recall List**: To print a list of the recalls for your search criteria, select the drop down next to the Search Results menu, then click Select All. You can then select print to print or export the list of patients

🚑 Recall List								x
Chart #	Las	t Name			Begin Date		Primary ID	~
Status	✓ Firs	t Name			End Date 06/30/2	2022	Value	
	Res	ource			V Max	Rows	25 <u>S</u> ear	ch Clear
Search Results								Row 0 of 4
Print Des	CTRL + p	ient Chart	Last Name	First Name	Resource Name	Due Date	Status	Home Phone
			T3st	Colby	Howard, Carole L.	03/31/2021	Cancelled	(333) 444-5433
Select All			Lion	С		04/10/2020	Recall	(865) 655-6565
Deselect All			T3st	Staci		06/18/2020	Recall	(205) 555-9999
			Test	Patient	Seals, Danielle	12/02/2020	Recall	(888) 280-6678

Print Recall Letters: To print letters for patients from your search criteria, select the letter template you want to print for all patients selected on the list, then click Print Letter (this brings individual letters for all patients on the list in a viewer where you can print all letters.

<u>Cha</u>	<u>t #</u>		Last Name			Begin Date		Primary ID	~
Statu	IS	×	First Name			End Date	06/30/2022	Value	
	Resource						Max Rows	25 <u>S</u> ea	rch Clear
	Search	Results							Row 0 of 4
	Sel	Appointment Date	Patient Chart	Last Na	me First Name	A Resource I	Name Due Date	Status	Home Phone
1	-		9388	T3st	Colby	Howard, Caro	le L. 03/31/2021	Cancelled	(333) 444-5433
2	~		9392	Lion	С		04/10/2020	Recall	(865) 655-6565
3	~		9336	T3st	Staci		06/18/2020	Recall	(205) 555-9999
4	~		9328	Test	Patient	Seals, Daniell	e 12/02/2020	Recall	(888) 280-6678
<									>
N	ew	Open Open	Patient Schedule	E Letters				Print L	etter <u>C</u> lose
					onsent Basic Procedure Co xcuse	nsent			
				1	Return to Work/Scho yMedicalLocker MML Welcome Lette New MyMedicalLock	ool w/ limit er er Print Instruct	tions		

 Intake Schedule: Select Intake Schedule to view scheduled patients intake assignments. By default, the Intake Schedule opens to Today; however, you can use the search criteria to search by Schedule date, Resource Group or Resource. From here you can assign an intake, merge completed forms and view completed forms

<u></u>	• i	iScheduler			1		1	1					Choi	ice Tr
1	oda	y 🕂 Time Period 🛛 🧾	Search O	oen 🛛 🚨 Search Recall	Intake Schedul	le 🔠 Patie	ent 🔻 🎓 Help	•						
6	Inta	ike Schedule - Internet	Explorer									- 1		×
					3									
Sch	nedu	le * 06/03/2021 😂 💳	Resou	rce Group		~	Resource(s) Sm	ith Dr, Robert		~	Show	All	Refres	h
E	_						•							
		Appointment (3)	F	orms to Merge (0)	Completed	d (0)	_							
Ac	tion	Office	Time	Patient		Device R	esource	Intake Name	Intake	Required	CoPay	Paid	Elig.	
	14. 15.	Connect	6:00 PM	Lion, C 10/01/1960(60)	/) Male	Sr	nith Dr, Robert				\$0.00	\$0.00		^
	1 1	Connect	7:15 PM	Test, Patient 07/19/19/	(45y) Female	Sr	nith Dr, Robert				\$0.00	\$0.00		
· ۱	Å	Connect	8:30 PM	Tester, Jenny 04/01/19	42(79y) Female	Sr	nith Dr, Robert	Established Patient			\$0.00	\$0.00		
														\sim

- 6. Patient: Select the Patient icon for Patient Setup or drop down options
- Opens Patient Setup for selected patient

	Patient Setup Webpa	ge Dialog —	x i
	Patient Setup	New Save Train More Tester, Jenny Born 01-Apr-1942(79y) Gender Female	¢۹
tule 🔚 Patient 🔹 🕪 Help	IC)	Chart 9375 Home (\$55) 888-2525 PCP Employer SSN Vork SSN Ethnicity Knoxville, TN 37823 USA Other Marital Race	
		Blue Shield - Indiana Anthem Star 1 data Commercial Star 1 data Copy \$60.0 Member ID # 123456789 GroupPelicy # 01/27/2020	
		Jenny Tester 555 Center Point Road Home (555) 888-2525 Work Work	
	Summary Demographics	Knoxwe, IN 31923 USA Unter Past 3/ Visits 60322021 830PM (15m) Smith Dr. Robert Choice Training Scheduled Established Patient Visit	
	Insurance	09/14/2020 11:45AM (15m) Smith, Talls Greensboro Office Checked-In Post-Op 04/21/2020 10:45AM (15m) Howard, Carole L. Choice Training Scheduled Post-Op	
	Responsible Party	Balance: \$0.00 Current: \$0.00 31 - 60: \$0.00 61 - 90: \$0.00 90 - 180: \$0.00 181+ Days: \$0.00	
	Emergency Contact		
	Comments		
	Patient Extension		
	Referral Tracking		

• Dropdown options

	Patient Primary Primary Secondary Patient Pri Send Con Patient Se Patient Co Patient Co Patient Co	Help Card Jurance Card otograph nmunication etup story ommunications omments					
	Open Pati Open Pati Open Pati Open Pati Open Pati Extension Eligibility Add to Re MyMedica Intake Ass	ent in EMR ent in eDocuments ent in Billing call List ILocker Admin					
ude E Patient • Help	Appointm Print / Fax Print Supe Print Supe Patient Setup Patient Setup	ge Dialog ge Dialog New Save Train Mo Chart 9375 555 Center Point Read Knoxville, TN 37923 USA	• re Home (555) 888-252: Other	Teste SPCP SSN Martia Language	r, Jenny _{Born} 01-	-Apr-1942(79y) Gender Fen Employer Ethnicity Race	□ X nale Øĝ
	Summary Demographics Insurance Responsible Party Emergency Contact Comments Patient Extension Miscellaneous	Blue Shield - Indiana — Ant Commercial Copy 91 80.00 Jenny Tester 555 Center Point Road Knoxville, TN 37923 USA Past 3 Visits 0903/2021 8.30PM (15m) 0914/2020 11.45SM (15m) 04/21/2021 0.45SM (15m) 04/21/2021 0.45SM (15m) Balance: \$0.00 Current: \$0.00 31	them Start date Member ID # 123456786 Member ID # 123456786 Hone (55) 888-2522 Work Other Smith Dr, Robert Smith, Taia Howard, Carole L -66: \$0.00 6	Sig On Fi GroupPot CroupPot CronsPot Greensbore Office Choice Training Greensbore Office Choice Training Sit - 90: \$0.00	e 01/27/2020 cy ≢ 01/27/2020 Scheduled Checked-In Scheduled 90 - 188: \$0.00	Established Patient Visil Post-Op Post-Op 181+ Days: \$0.00	I.
	Referral Tracking						

7. Help: Select the Help icon to view shortcuts or the iSalus University



• Shortcuts – view Alt Key and Control Key tips

Keyboard Sl	nortcuts
Alt Keys	
Alt+0	Patient Index Card
Alt+1	Primary Insurance Cards
Alt+2	Secondary Insurance Cards
Alt+3	Patient Photographs
Alt+4	Communications
Alt+5	Patient Setup
Alt+6	Patient History
Alt+7	Patient Communication History
Alt+8	Patient Comments
Alt+9	Patient Appointments History
Alt+.	Extension
Alt+s	Set focus to the patient search text box
Alt+q	Quick Key (this window)
Control Keys	
Ctrl+?	Search Open Placeholders
Ctrl+q	Appointment Quick View
Ctrl+s	Appointment Search window
Ctrl+z	Refresh the schedule
Ctrl+[RMC]	Move Appointment (RMC=Right Mouse Click)
Esc	Cancel move appointment

• Train Me - helpful training materials via the iSalus University



Add a New Patient to Database

New patients can be added to your database with either the Quick Create, Create MML or Full Patient Setup.

Note: As a rule, always search for the patient prior to adding a new patient to the database.

To **Search** for a patient, click the **search** icon in the upper right corner of either the iScheduler or EMR and being typing. This can be a combination of patient First Name, Last Name, SSN or DOB.



If no results are found, use the dropdown arrow and select Create Patient Account

Se	arch for Patient	Q K
	Display Last Search Results	J
	Create Patient Account	_
	Turn Off Auto Search	_
•	Advanced	

Quick Create

Quick Create allows you to create patient account from this screen with minimal required fields. Enter criteria and select **Create**

	Search for Patient	۹.
Cr	eate Patient Account	x
First Name *	Test	
Last Name *	Patient	
DOB *	01/01/2001 😂 🚃	
Gender *	Male 🗸	
Home *	Ext	
Work *	Ext	
Other *	(888) 888-8888 Ext	
✓ Responsi	ble Party Same as Patient	
Setup	Create Create - MML Canc	el

Create MML

Select Create-MML to quick create a patient account and connect to MML

				Search for I	Datient	٩.
0	Cre	eate Patient Acc	ount			x
First Name	*	Test				
Last Name	*	Patient				
DOB	*	01/01/2001 😂				
Gender	*	Male	~			
Home	*		Ext			
Work	*		Ext			
Other	*	(888) 888-8888	Ext			
 Respon 	sil	ble Party Same a	as Patie	nt		
Setup		Create	Create	- MML	Canc	el

Connect Patient

Patient, Test 01/01/2001(20y) Male

Кеу	Requested By	Date	Status
			•
			~
			~
Print Key	Delete Key Audit Ke	ey	Connect Patient

Full Patient Setup

To create a new account from the full patient Setup, select Setup



You are automatically directed to the New Patient Setup window. Fill out required fields (indicated by *) as well as additional fields, and click **Save**

Patient Setup	New Save	Train More								New	Patient Setup	Рø
	Name			Ad	dress					Chart		
	First *	Test]	Address 1	123 Test Lane				Chart #		
	Middle]	Address 2					User Defined		
	Last *	Patient]	City					DOB	01/01/2001 😂 💳	
	Nick]	State	~	Coun	try US	SA 🗸	RHC		
	Suffix]	Zip					✓ Signature ¹	05/27/2021 😂 💳	
	Demographics			Co	ntact					Status		
Summary	Gender *	Male	♥ 🏹	1	Home	*	Ext			Marital		~
Demographics	Ethnicity		~	ß	Work		Ext			Employed		~
Insurance	Race		~ ~	ß	Other		Ext			Employer		
Responsible Party	Lang.		~]	Email					Student		~
Emorgoney Contact	Location	Primary Location	Q		Reminder				~			
Emergency contact	✓ Active	 Reportable 	Do NOT print S	staten	nents							
Comments	Provider											
Case Management	PCP	Primary Care Physic	ian		٩ 🛈							
Sliding Fee	Referring	Referring			Q 🛈							
lmmun. Registry	Doctor	Doctor			٩ 🛈							
Patient Extension	Rx Hist.				~							
Miscellaneous	Identification											
Referral Tracking	Primary	~										
Referrar Hucking	Secondary	~										
	Old ID #1											
	Old ID #2											
	Old ID #3											
	Responsible	Party Same as Patie	nt									
		,										

1. **Insurance** – enter required and additional fields. Select "Same as Patient" if patient is the guarantor which will populate demographic fields

Patient Setup	New Save Train More		Patient, Test Bo	m 01-Jan-2001(20y)	Gender Male
\bigcirc	Cov. Active Payer		Primary ID	Group/Policy #	Copay
					~
	Guarantor				
Summary	Coverage 1 🗸	Insured 💿 San	ne as Patient 🔘 Individual	Company Popul	ate Patient Information
Demographics	First Test	Address 1		Phone	Ext
Insurance	Middle	Address 2		Signature	\$
Deenensible Deete	Last Patient	City			
Responsible Party	Suffix	State	✓ Country	V Zip Code	
Emergency Contact	Gender Male	✓ Email			
Comments	Relationship Self	 Employer 			
Case Management	DOB 01/01/2001 😂 🗔	Property Casualty			
Sliding Fee	Insurance Policy				
In the Deviation	Start 05/27/2021 😂 💳 Er	nd 🚺 Be	nefit Reset 🔅 🗖		
immun. Registry	Payer Aetna U.S. Healthcare	Instant	ured ID Member ID #	XYZ123	×
Patient Extension	Type Commercial	✔ Se	condary ID 🗸		
Miscellaneous	MSP Reason	❤ Gr	oup Name		
Referral Tracking	Copay 💿 S 🗌 🔿 %	Gr	oup/Policy #	Plan Code	
	Deductible Amount Met				
	Max out of Pocket Met				
	Authorization Required Do not	perform 270 eligibility	Doct	ment List Order Route	Eligibility

2. **Responsible Party** – Select Populate Patient Information if patient is responsible party. If a different party, enter required and additional fields as needed

Patient Setup	New Save	Train More		P	atient, T	est Born	01-Jan-	2001(20y) G	ende	r Male	
	# First Name 1 Test	Last Name Patient				Primary II	D Re	lationship			
	Responsible Part	y									
Summary	Order *	1 🗸	Туре	Same as Patie	nt O Ind	ividual C) Company	Populate	e Patie	ent Informatio	n
Demographics	First	Test	Address 1				Home		Ext		
Insurance	Last •	Patient	City				Other	(888) 888-8888	Ext		1
Responsible Party	Suffix		State	~	Country	~	Zip Code		j		
Emergency Contact	Gender	Male 🗸	Email								
Commente	Relationship	Self 🗸	Employer								
Case Management	DOB	01/01/2001 😂 📩 ent Statements	ID Type		V ID Va	alue					
Sliding Fee	Security	Туре		 Security Date 	ta						
Immun. Registry	This patier	nt has statements that are marke	d as past due.								
Patient Extension											
Miscellaneous											
Referral Tracking											

3. Emergency Contact - add up to two emergency contacts, then click Save

Patient Setup	New Save	Train More			Patient,	Test Born 0	1-Jan-2001(2	20y) Gender Male	Р¢
	Primary Contact Name Relationship Home Phone Work Phone Other Phone	Sally Patient Mother (555) 555-5555	Ext		Name Relationship Home Phone Work Phone Other Phone	t George Patient Father	Ext	v	
Summary	Email	II PHI Access	May Pick up Medication	ns [Granted Ful	I PHI Access	May Pick	up Medications	
Demographics	Exclusions to P	н			Exclusions to Pl	н			
Insurance				•				^	
Responsible Party				-			I	~	
Emergency Contact	Comments			_	Comments				
Comments				•				^	
Case Management				-				~	
Sliding Fee									

Check-In

How to Check-In Appointments

1. Right click over the patient appointment, select Checked-In



2. The Patient Validation runs looking for missing critical information that would impact billing, Click OK

Patient Validation Webpage Dialog	\times
Patient Validation Checks: Danielle Test is missing the following field(s) Patient's Signature on File Patient's Signature on File Date Test, Danielle Primary Insured Signature Test, Danielle Primary Insured Signature Date	
<u> </u>	

3. Missing items can be added by clicking on the patient name in the upper left hand corner, taking you to the Patient Setup

	Quick Pay -	26135 - Danie	elle Test	Bala
		4m		
-				

4. After making corrections and saving the information, you'll be back at the Quick Pay screen, where the Patient Validation can be ran again, ensuring all necessary information has been entered

History	Payments	Validate	Intake Assign
Insurance In	Patient Validation W	/ebpage Dialog	×
Coverage A			
1 Y	Patient Valida Danielle Test checks.	tion Checks: has passed the v	alidation
			<u>0</u> K

5. If your practice takes Co-pays at check-in, this may be entered from the Quick Pay window

	ay - 20	Danielle	Test Balan	ce: \$0.00	_						
						1 Receipt	2 Claim	<u>3</u> Orders	4 Prescription	5 Letters	6 Print Qu
ppointm	nent De	tails									
ppt. ID	Date &	Time	Resource	Name	Prima	ry Care Phys	ician	Service Loo	ation		
5526	08/30/2	021 8:00AM	Test M.D.,	Shawn M.	None	Reported		Family Firs	t Physicians	Q	
Histo	ory	Payments	Validat	e Int	ake Assign						
nsurance	e Inforn	nation									
Coverage	Active	Payer					Insur	ed ID	Group/Policy N	Number C	Copay
	Y	BCBS Anthem					9876	54		\$	\$0.00
nter Nev	N Recei	IDT LIETAIL									
o claim is ppointmer Amount	attached nt Estima \$25.0	I to this appointme ted Balance: \$0.0 0	ent, current Char 10 Noclaim, u	ge Rate is 10 nable to calcu	IO% Jate	✓	Include Com	ment on Rece	ipt 🗸 Ir	nclude Diagn	osis on Recei
lo claim is ppointmer Amount Paid By	attached nt Estima \$25.0 (1) Da	I to this appointmented Balance: \$0.0 0 anielle Test	ent, current Char 10 No claim, u Method*	rge Rate is 10 nable to calcu	IO% Jate	V	Include Com Receipt Asso	ment on Rece ociated with Cl	ipt 🗸 Ir aim 🗸 Ir	nclude Diagn nclude Proce	iosis on Recei
lo claim is oppointmen Amount Paid By Type	attached nt Estima \$25.0 (1) Da Co-Pa	I to this appointme ted Balance: \$0.0 0 anielle Test ay	ent, current Char 10 No claim, u •• Method*	ge Rate is 10 nable to calcu Credit Card	Ilate	Y	Include Com Receipt Asso Create Receip	ment on Rece ociated with Cl ot Take P	ipt ✔ Ir aim ✔ Ir ayment	nclude Diagn nclude Proce Receipt	osis on Recei dures on
lo claim is ppointmen Amount Paid By Type D # Comment	attached nt Estima • \$25.0 • (1) Da • Co-Pi	I to this appointme ted Balance: \$0.0 0 anielle Test ay	ent, current Char 10 No claim, u V Method*	rge Rate is 10 nable to calcu Credit Card	10% ulate		Include Com Receipt Asso Create Receip	ment on Rece ociated with Cl ot Take P	ipt 🗸 Ir aim 🗸 Ir ayment	nclude Diagn nclude Proce Receipt	iosis on Recei idures on
lo claim is ppointmen Amount Paid By Type D # Comment eceipt T	attached nt Estima • \$25.0 • (1) Da • Co-Pa	to this appointmented Balance: \$0.0 0 anielle Test ay tions	ent, current Char 0 No claim, u Wethod*	ge Rate is 10 nable to calcu Credit Card	10% Jate	Y	Include Com Receipt Asso Create Receip	ment on Rece ociated with Cl ot Take P	ipt ✓ Ir aim ✓ Ir ayment	nclude Diagn nclude Proce leceipt	iosis on Recei
o claim is ppointmen mount Paid By Type D # Comment Comment	attached nt Estima • (1) Da • (0-Pa • Co-Pa	to this appointm ted Balance: \$0.0 0 anielle Test ay tions t Date Pal	ent, current Char 0 No claim, u Method*	ge Rate is 10 nable to calcu Credit Card	10% Jate	Method	Include Com Receipt Asso Create Receip ID #	ment on Rece ociated with CI ot Take P	ipt v Ir aim v Ir ayment	nclude Diagn nclude Proce lecceipt	oosis on Recei dures on er ID
lo claim is ppointmen Amount Paid By Type D # Comment Comment eceipt T mount Pa	attached • \$25.0 • (1) Da • Co-Pa •	to this appointm ted Balance: \$0.0 0 anielle Test ay tions t Date Pal	ent, current Chaim, u	ge Rate is 10 nable to calcu Credit Card Type	0% Jlate	Method	Include Com Receipt Asso Create Receip ID #	ment on Rece ciciated with CI at Take P	ipt v Ir aim v Ir ayment	nclude Diagn nclude Proce teceipt	osis on Receij dures on ar ID

6. Simply enter the Payment Amount, Payment Type (Co-pay), and Payment Method in the Receipt Detail area of the Quick Pay window.

Enter New Receipt Detail

No claim is attached to this appointment, current Charge Rate is 100%

Annointme	t Estimated Balance: \$0.00	to claim, unable to calculate
Amount	• \$25.00	
Paid By	 (1) Danielle Test 	✓
Туре	* Co-Pay 🗸 🗸	Method* Credit Card 🗸 🗸
ID #		
Comment		^
		\checkmark

7. Select **Create Receipt** for cash, check, and non-PaySimple credit card payments. (Read more about our PaySimple credit card integration.)

ter New claim is a	Receipt Detail ttached to this appointme	ent, current Charge Rate is 1	00%		
nount iid By pe # mment	\$25.00 (1) Danielle Test Co-Pay	✓ Method [∗] Credit Card	 	Include Comment on Receipt Receipt Associated with Claim Create Receipt Take Payment	 ✓ Include Diagnosis of ✓ Include Procedures Receipt

8. For PaySimple credit card payments, select Take Payment

Most practices will wait to print the receipt until Check-Out in order to include future appointments, proof of visit, and proof of payment on the same printout. However, receipts will generate in the Receipt Transactions area and can be printed during Check-In, if necessary. Simply select the receipt and then select

Check-Out

How to Check-Out Appointments

1. Right click over the appointment, select Checked-Out



2. The Quick Pay screen will load, where the Patient Validation verification can be ran again, ensuring all necessary information has been entered

History	Payments	Validate	Intake Assign
Insurance In Coverage A 1 Y	Patient Validation W Patient Validat Danielle Test H checks.	/ebpage Dialog tion Checks: has passed the valid	ation

3. If your practice does not take copays at check-in, this can be entered from this same screen:

	uy 20	155 - Damen	e resi	Balance: \$	0.00	4 Decelat	2.01-1	2.0-4	4 December 1	E Latter	C Dinto
						<u>1</u> Receipt	2 Claim	3 Orders	4 Prescription	5 Letters	<u>6</u> Print Qu
ppointn	nent De	tails									
oppt. ID	Date &	Time	I	Resource Name	P	rimary Care Phy	sician	Service Lo	cation		
5526	08/30/2	2021 8:00AM	1	fest M.D., Shawr	n M. N	one Reported		Family Firs	st Physicians	Q	
Hist	ory	Payments		Validate	Intake Ass	sign					
suranc	e Inforr	nation									
Coverage	Active	Payer					Insure	ed ID	Group/Policy	Number 0	Copay
	Y	BCBS Anthem					9876	54		:	\$0.00
nter Net	w Rece	ipt Detail									
ppointme Amount Paid By	nt Estima • \$25.0 • (1) D	d to this appointn ated Balance: \$0 10 anielle Test	.00 N	rrent Charge Ra lo claim, unable f	te is 100% to calculate		Include Comr	nent on Rece	sipt 🗸	Include Diagn	nosis on Recei
Amount Paid By Type	nt Estima • \$25.0 • (1) D • Co-P	d to this appointn ated Balance: \$0 10 anielle Test ay	.00 N	Irrent Charge Ra lo claim, unable f Method* Credit	te is 100% to calculate] Include Comr] Receipt Asso	nent on Rece ciated with C	sipt 🗸 Iaim 🗸	Include Diagn Include Proce Receint	nosis on Recei edures on
Amount Paid By Type D #	nt Estima • \$25.0 • (1) D • Co-P	d to this appointn ated Balance: \$0 10 anielle Test ay	.00 N	rrrent Charge Ra lo claim, unable t Method [®] Credit	te is 100% to calculate] Include Comr] Receipt Asso Create Receip	nent on Rece ciated with C t Take F	eipt ✓ Iaim ✓	Include Diagn Include Proce Receipt	nosis on Receij edures on
ppointme Amount Paid By Fype D # Comment	* \$25.0 * (1) D * Co-P	f to this appointn nted Balance: \$0 0 anielle Test ay	.00 N	irrent Charge Ra lo claim, unable l Method [®] Credit	te is 100% to calculate] Include Comi] Receipt Asso Create Receip	nent on Rece ciated with C t Take F	sipt 🗸 Iaim 🗸 Payment	Include Diagn Include Proce Receipt	iosis on Recei
ppointme Amount Paid By Type D # Comment	nt Estima • \$25.0 • (1) D • Co-P	to this appointn tted Balance: \$0 10 anielle Test ay ttions	.00 N	Irrent Charge Ra lo claim, unable t Method* Credit	te is 100% to calculate] Include Comr] Receipt Asso Create Receip	nent on Rece ciated with C t Take F	aipt 🗸 Iaim 🗸 Payment	Include Diagn Include Proce Receipt	nosis on Recei
ppointme mount Paid By Type D # Comment eccipt 1 mount Pa	transact	to this appointn ted Balance: \$0 i0 anielle Test ay tions t Date P	aid By	Irrent Charge Ra	te is 100% to calculate	Method] Include Comr] Receipt Asso Create Receip	nent on Rece ciated with C t Take F	bipt V laim V Payment	Include Diagn Include Proce Receipt	nosis on Recei dures on er ID
ppointme Amount Paid By Fype D # Comment	ransac aid Pos	to this appointn ited Balance: \$0 0 aniello Test ay tions t Date P	aid By	rrent Charge Ra	te is 100% to calculate	Method] Include Comm Receipt Asso Create Receip	nent on Rece ciated with C t Take F	oipt v laim v Payment	Include Diagn Include Proce Receipt	er ID

4. Simply enter the Payment Amount, Payment Type (Co-pay), and Payment Method in the **Receipt Detail** area of the Quick Pay window.

Enter New Receipt Detail

No claim is attached to this appointment, current Charge Rate is 100%

Annointme	t Estimated Balance: \$0.00	o claim, unable to calculate
Amount	• \$25.00	
Paid By	 (1) Danielle Test 	✓ #
Туре	* Co-Pay 🗸 🗸	Method* Credit Card 🗸
ID #		
Comment		^
		\vee

5. The green pushpin within the tabs indicate an item is ready to be printed or processed. For example, a pushpin above Orders could indicate that a follow up appointment requires scheduling.

E	Quick Pay - 26135 - Danielle Test Balance: \$0.00							, ⊡
Ł			1 Receipt	📮 <u>2</u> Claim	4 3 Orders	4 Prescription	5 Letters	📮 <u>6</u> Print Queue
	Open Orders	🖹 🖨	0 🞽 1	à 🔝 🧕	• 🗙 🗄	I 🖉 🕙 🧳	1	
	्र 🗄 - 💆 🎓 🚺	Return	to office (Months): 6	;			
	Arranged By: Priority	Test, Da	nielle					
	Norm	Female, M	lext Appt: N/	4				
	🙎 Test, Danielle Female Next Appt: N/A Age: 36y 01/01/1985	Prior	i ty: No	mal.				
	Scheduling Return to office (Months): 6	Арро	intment: So	neduling at 08	/30/2021 00:00)am. 🦁		
	- Im	Proce	essor: Of	ice Staff (<u>Ope</u>	<u>n</u>)			
1		Rend	ering: Te	t M.D., Shawr	M. Ref	ferring:		ICD:

6. Selecting this tab displays Open Orders. Select the order below the patient's name. This will display the order details in the right side of the window. After reviewing the order details, you can schedule the appointment by selecting the double boxes in the upper right hand corner of the QuickPay window. This will minimize the QuickPay window to take you to the iScheduler to schedule the follow-up visit.



7. Once the appointment is scheduled, select the calendar box in the upper, left-hand corner to re-open the QuickPay window



8. Single click on the Processing status to Close the Order



9. Once any follow-up appointments are made and orders are closed, navigate to the **Print Queue** tab to view all items waiting to be printed. If no additional items need to be printed, navigate back to the Receipt Tab and use the **Print Receipt** button to print the receipt with the future appointment info.

			4 4 1	Page 1	l of 1	Choice	Custome	erReceipt	
			Cu Friendl	Istomer Rec y Family Physician 1 Virginia Avenu Suite 500 anapolis, IN 46204 (317) 687-8111	e ipt Is PC LL1 P I-1928	NPI: 12 Federal	234567890, TIN: ID#: 36-4492602		
		Patient				Appointmen	t		
Chart #: 26135 Danielle Test DOB: 01/01/1985 100 Main St Knoxville, TN 37922				ID #: Appoi Chec Chec Rend	10 #: 85526 Appointment Date: August 30, 2021 8:00:00 am Check In: 08/31/2021 10:52AM (EDT) Check Out: 08/31/2021 12:44PM (EDT) Rendering Provider: Test M.D., Shawn M.				
D	ate		Paver	Pavment	Method	Comm	ent	Amount	
08/31/2021 1:	25PM (EDT)	Danielle Test	-	Co-Pay Credit Ca	ird			\$25.00	
							Total:	\$25.00	
			Fu	ture Appointm	ents				
Date	Time	R	endering Provid	er	Referrin	g Provider	Prior Author	ization	
02/28/2022	8:00:00 am	Test M.D.,	Shawn M.			-			
Over 150	Dave 121	- 150 Dave	91 - 120 Dave	61 - 90 Dave	31 - 60 D	ave Current	Total Ba	lance	
	Days 121	\$0.00	\$0.00	\$0.00	\$0.00	so 00	S0 0		
\$0.00	ID: 17291			Ba	lances may not	include insurance pend	ing or current day	s charges.	
\$0.00 eceipt Batch	D. 17201								
\$0.00 eceipt Batch pecial Messa	ge with many c	haracters							
\$0.00 Receipt Batch	ge with many c	haracters							

Faxing a Letter

For practices that have configured integrated faxes, you will be able to electronically fax any document that you can print out of the application. Printing documents can occur from nearly any screen in the system.

1. Select the **Print** icon by selecting the More button, then select Print.



2. The Print Preview window will appear, select the Fax button. This is found in the upper right-hand corner.



3. The **Send Fax** window will display. PCP, Referring and Care Team Members will display as quick add Recipients or you may search for additional Recipients. Select the Recipient, add Subject, Urgent-Review-Comment-Reply-Info option and/or Message, then click **Send**.

Send Fax						×
Fax			т	o the following #	#s	
S Descri	S Description Size			Click to enter co	tion 🔍 🗸 🗸	
V PDF R	eport	1 page(s)		Display 2 of 2 ro	ws	Create Contact
				Number	Contact Name	Туре
				(888) 123-4567	Doctor Test, MD	PCP
			~	(888) 123-4567	Doctor Test, MD	Referring
Cover Page						
From *	Carole Howard		~			
	New Deficie Defemal		~			~
Subject	New Patient Referral		*			
Urgent	✓ Review Comment	Reply	Info	Recipient(s) *	🚨 Add	Belete
Message	Thank you for your referral			Number	Contact Name	Type S
			^	(888) 123-4567	Doctor Test, MD	Referring
			*			•
						Send Cancel
						U

4. To fax a SOAP/Progress Note, click on the **Print** icon at the top right and then follow steps 2-3 from the Print/Preview screen.

09/08/2021 - Carole Howard (Signed-Off)	~	r 😑 🛛		Problems		
Subjective History of Present Illness - Howard, Carole			Cervical Misc disord	der at C5-C6 level with radiculopathy	Future	
Chief Complaint: Elbow Pain, Foot Pai 🖉 PDF Report - Ir	nternet Explorer				-	×
History Personal Medical History: Endocrine:	Carole T3st Chart Number: 9333 Bone Phone: (65) 27	DOB: 01/01/1959 Age: 62y 72-8499 Gender: Female	Service: Provided at:	Soap Note Princeton Pain and Spine	-	=
Allergies	Address: 123 Tos Winne C Chief Complaint:	Lana Jardan, FL 34787	Encounter Date: 09/08/2021			
No Known Drug Allergies	Subjective History of Present lines	26 - Howard, Carole				
Current Medications	Chief Complaint: Elbow F	fain, Foot Pain, Low back pain with left lower extre	emity radiation			

5. To fax a Letter from the **Quick** Pay window, click on the **Print** icon and again follow steps 2-3 from the Print/Preview screen.

11-1 - A A A A A A A A A A A A A A A A A						
🛗 Quick Pay - 9341 - Ineeda Test Balance: \$0.00						🗗 🗙
_	1 Receipt	2 Claim	4 3 Orders	4 Prescription	5 Letters	6 Print Queue
Template Saved By			Status	~		
Letter Name New Letter Letter Date			Revision			
	5	1				

Scanning and Importing Documents

Most documents are scanned and imported via the eDocuments Portal. Navigate to the eDocuments portal by locating the portals in the lower, left-hand corner of the database.

🎇 Setup
Reports
💆 EMR
iScheduler
😃 Billing
eDocuments

Scanning Documents

1. Search for Patient by clicking on the manila folder to open the search screen. Type in the patient name to view results, then select patient.

	Documents							ENTChoi	ce 📃		
ranced	I Search 🛛 🔍 🗸										
1 1	🦸 • 🗔 • 🛞	- 0 D		á • 🗩 • 🖱	• 🖂 • 📃		· • 🗵 🗛 ·	- 12 🖸 📦			
anged	Ar Dene										
0	Patient Search Webp	age Dialog									;
) 🛅 🕫	⇒		Q test			× Advar	ced Search	6	Patient S	earch 🚿
N	ew Open Tr	rain More		S 1051			∧ ∧uvai	iced Search	Y		
	Patient Id 🛛 🗮	Last Name	First Name	Nick Name 😑	Middle Name 😑	Suffix =	DOB =	Home Phone	Other Phone	State ≡	Gender
11	9328	Test	Patient				07/40/4075			181	Female
							07/19/19/5	(888) 280-6678		IN	remale
	9329	Test	Jillian	Otolaryngology			10/23/1969	(888) 280-6678		IN	Female
	9329 9331	Test Test	Jillian Alexandra	Otolaryngology Alex			10/23/1969 01/01/2001	(555) 555-5555 (317) 275-3958		IN IN IN	Female Female
	9329 9331 9332	Test Test Test	Jillian Alexandra Alexis	Otolaryngology Alex			07/19/19/5 10/23/1969 01/01/2001 10/04/2021	(888) 280-6678 (555) 555-5555 (317) 275-3958 (333) 555-6677		IN IN	Female Female Female

2. Patient Documents are scanned into the Patient Docs Cabinet. Open the Cabinet, Drawer and then Folder that you want to scan documents to.



3. Right click over the **Folder** to scan a document into that folder.

From the menu, select either:

- Multiscan (SF) to scan a multiple page document as one file.
- Multiscan to scan each page as it's own unique file.



4. The edit window will appear. Begin by creating a Filename.

Multiple Page (Sin	gle File)		X
Location:	Documents:Test Results:Radiology		
Document Group:	Filename	x	
Filename:	MRI Report	×	
Type: Comment:	Extension TIF		
Receive Date:			
		<u>о</u> к	Cancel

- 5. Users may wish to add additional data to the document. Click on the following additional fields to add:
- Add a Comment

Multiple Page (Singl	e File)	X
Location:	Comment	X
Document Group:		
Filename:		\sim
Туре:		
Comment:		\sim
Receive Date		
	<u>о</u> к	Cancel

• Add a Receive Date (Note: This will add the document to the patient's Timeline per the receive date.)

Multiple Page (Sin	gle File)	x
Location:	Documents:Test Results:Radiology	
Document Group:	27	
Filename:	MRLReport	
Туре:	ReceiveD ×	
Comment:		
Receive Date:		
45		
Ŭ	<u>0</u> K	Cancel

6. Press the **OK** button to scan the document(s). This will launch the PC's scanner menu.

Multiple Page (Sin	gle File)	X
Location:	Documents:Test Results:Radiology	
Document Group:		
Filename:	MRI Report	
Туре:		
Comment:	From Lighthouse Imaging	
Receive Date:	09/21/2021	
		OK Cancel

Importing Documents

To import a document into eDocuments, follow these steps:

1. Right-click on the **Folder** where you want to place the document(s). You must right-click over a folder, not a cabinet or drawer.



2. Select the document from your computer and click **OK**.

C∃. Select Import File(s)		×
C: [Windows]	2021-06-22_11-54-46.jpg 65032.jpg 65099 bioreference lab.jpg Patient Education.jpg print PIF.jpg Procedure Report.png Recall file.csv rename PIF.jpg Test.Patient MBI.png Test.Patient Lab Report.jpg	
	ОК	Cancel

Pro Tip: Users can multi-select documents by holding the +Ctrl button on your keyboard and selecting all of the documents you would like to import.

EMR Overview

The following guide is an overview of the EMR Portal. Users will gain knowledge of the different areas of the EMR portal including setup and some additional helpful tips

To access the EMR, begin by selecting the EMR portal the bottom, left-hand corner of your screen.

💥 Setup
Reports
👮 EMR
iScheduler
eDocuments
Desktop
Current User Trainer, Test

Tip: Users can set the EMR as their default screen when logging in to the program by modifying their Default Screen in the User Setup.

Selecting a Schedule

 To view patients on a resource or multiple schedules, click on the pencil to display a list of resources. Select the **Pencil Icon** to reveal the resource(s) schedule(s). Select the Resources in order to display the appointments scheduled with that Resource.



2. The list of appointments will display in the Office Schedule.



Appointment Display Options

1. Select preferences for what is displayed in the Patient List with the various display options.

Clinician's Schedule 🙏			
🥖 Resources			
Anderson M.D., Scott			
Patients to Display 6			
✓ Disp. Chief Complaint			
✓ Disp. Appt. Status			
✓ Disp. Room Status			
Only Checked In			
✓ Time Checked In			
✓ Superbill/Soap Status			
✓ Auto Refresh			
✓ Intake Status			

Open Patient in EMR

1. From the **scheduled appointment**, select the patient from the schedule. The lime green side bar to the left of the appointment indicates the patient's chart is currently open.



NOTE: Always open scheduled patients in the EMR from the appointment list. Searching for the patient will not link back to the scheduled appointment for the required SOAP Note or Superbill.

2. To open a patient's chart that is not on the schedule, search for the patient in the top, right corner of the EMR portal.



Menu Bar

The menu bar across the top of the EMR portal has additional options for navigating and performing tasks in the patient's chart.

Details/History

Toggle between the Timeline Details and History view



Patient Index/Drop down options

Click on icon to open Patient Index or use the drop down for additional menu options

New Save Zetails Copy		Patient 🔽 👓 More 🔹
		Comments
Allergies	\square	Communication
Penicillins		Patient Communications
		Care Team
		Hospital Round History
	₫	Open Patient in Billing
		Room Assignment
	e	Print / Fax Queue
	Ļ	Recall
	=	Reminder
	1	MyMedicalLocker Admin
		Intake Assignment
	×	Close Patient

More menu

Print the Patient Facesheet


Patient Display

The patient's name, DOB and Gender display on the top right of the screen. Simply hover over the name for additional demographic information.

🚯 🖏 Johns	on, Emily Born	06-Jan-1999(22y) Gender Female
Encounter	Patient Born Gender Primary Ins. Secondary Ins.	Johnson, Emily 06-Jan-1999(22y) Female
onunents 3c	Phone Home	(317) 275-3948
valuation	MML Chart #	Not Connected 9642

Top Section

Displays Allergies, Medications, Problems and Encounters

• Drop downs

Utilize drop down for Allergies, Medications and Problems to open chart tab or mark as reviewed



• Encounter hyperlink

Double click on encounters to open the appointment list



Clinical Messages

Clinical messages display in this section based on rules/setup

	moodagoo
he U.S. Preventive Services Task Force (USPSTF) recommends screening for high blood pressure in adults age 18 years and older.	

Timeline

The Timeline within the Summary chart tab allows a user to see key data points that have been added to a patient's chart over time. Each clinical marker can be hovered over to see basic information about that new chart time. Once clicked, more details are displayed.

		Timeline		
<u> </u>				
Medications	\bigcirc	$\overline{\mathscr{O}}$	\checkmark	
Notes				
Order Results				
Communications			(
eDocuments		۲		
Vitals			©	
Health Exchange				
Ē 👩	5/5/19	8/11/19	11/18/19	Today
	<			>

• Hover to display details

	Clinical Me	ssa	ges
t	08/11/2019 Insurance.Cards.Secondary Insurance Cards Secondary Insurance Card - Back.png Secondary Insurance Card - Front.png Patient Photograph.EMR.Head Shot headshot.png	ne	
	\checkmark		\checkmark
	Ð		
			(

• Clipboard

The Clipboard at the bottom left of the Timeline allows users to Reconcile Allergies, Medications and Problems. Keep or Remove items then click Save

Allergies		Medication	าร		Problems		
	Patient Rec	onciliation for Chart # 9642, Jo	hnson, Emily 01/06/1999(a	2y) Female Webpa	ge Dialog	\times	
Penicillins	Allergies,	Medications, Problems and	Immunizations will be u	pdated as indicated	by the Action column	n.	iropa
	M Action	Allergen	Reactions	Date	Source		
	Keep	Penicillins		12/07/2021	Patient Chart	^	
	I A ation	Medication		Data	Source		
	Keep	Cozaar 100 mg tablet TABLE	T ORAL	12/07/2021	Patient Chart	-	
	Keep	metformin ER 500 mg tablet,e	extended release 24 hr Ta	12/07/2021	Patient Chart		
	Кеер	Singulair 5 mg chewable table	et TABLET, CHEWABLE	12/07/2021	Patient Chart		
	Action	Problem		Date	Source		
	Keep	Acute recurrent sinusitis, uns	pecified	12/07/2021	Patient Chart		
	Keep	Chronic kidney disease, stage	e 1	12/07/2021	Patient Chart		
	Keep	Diabetes due to underlying co	ondition w diabetic arthropa.	. 12/07/2021	Patient Chart		
	Action	Immunization	Date	Source			
	No active imm	nunizations					
	Action	Immunization Forecast	Due Da	te Schedule	Source	_	
	No active imm						
The U.S. Preventive Services Task Force (USPSTF) recomm							
Medications							
Notes							
						~	
Order Results							
Communications	* Allergens	and Medications will be load	led using today's date if	the source date is t	blank		
	CCDA No	t Available	Encounter	12/07/2021 😂 📩	Preview Save		
eDocuments							_
Vitals							
Health Exchange							
		12/7/21					

• Vitals

To view Vitals Graph/Table, click on the Heart symbol at the bottom left of the timeline



Patient Photograph/Telehealth

This section displays the Patient Photograph. You can also launch a Telehealth session if enrolled.



Patient AMP

The Patient AMP is a quick view of Allergies, Medications, Problems, Vitals and Results

Patient AMP
🚿 Allergies
Penicillins
Medications
Cozaar 100 mg tablet
metformin ER 500 mg tablet,extended release 24 hr
Singulair 5 mg chewable tablet
Problems
Diabetes due to un
Chronic kidney dise
Acute recurrent sin
💖 Vitals
🗏 Results

Chart Tabs

Chart Tabs contain templates to document a patient encounter. The list can be customized (see Customize View section) for instructions.

Chart Tabs	\$
Summary	
HPI	
Vitals	
History	
Allergies	× .
Immunizations	
ROS	
Exams	
Exams	
Assessment	
Order Entry	
Medications	× .
Superbill	
SOAP Notes	
Letters	
Problem List	×.
Flowsheets	
Chart Share	
Obstetrics	
eDocuments	
Treatment Plans	
Extension/Vital	
Patient Education	
Goals	
Dialysis Visits	
Implantable Devices	
Health Exchange	

Quick Picks

The Quick Picks tool allows a user to set up custom phrases that can be copy/pasted into any template.



E/M Coding

The E/M Coding optional tool allows a user to calculate E/M code based on new 2021 rules based on MDM (Medical Decision Making) or Time.

E/M Co	ding 🕆
DOS	12/07/2021 🔷 📰
Patient Time	● New ○ Est.
99205 99204 99203 99202	
	MDM
	Refresh

Customize View

• Top Section, Timeline and/or Other section view, right click anywhere on the Timeline

3	≥	Train Me	
Ē		Window Print	
2	2	User Settings	
	J	Screen Settings	
	2	Company Settings	
s.	5	Refresh	
10	Þ	Setup	

Mark or unmark each item you want to view. You can also order each section by moving the up/down arrows

S	Setup ×				
_		Top Section			
	Section Name		Enabled		
•	Allergies		~		
	Medications		✓		
	Problems		✓		
Ŷ	Encounters		✓		
	Goals				
		Timeline			
	Section Name		Enabled		
	Medications		~		
Ŷ	Notes		✓		
	Immunizations				
	Order Results		✓		
	Communications		\checkmark		
	eDocuments		✓		
	Obstetrics				
	Vitals		✓		
\checkmark	Health Exchange		✓		
	Telehealth				
	Authorizations				
		Other			
Se	ction Name		Enabled		
Pa	tient Reconciliation		~		
Cli	nical Messages		✓		

• Chart Tab/AMP view, right click in the Chart Tab area, select Setup Favorites

Chart	Tabs 🎸
Sum	mary
HPI	^
Vital	s 🗖
Hi Al	Display Favorites
In R	Display All
E	Setup Favorites
Qu	Expand All
•	Collapse All
_	0

Select Chart tabs to view as well as select order they display with the up/down arrows, then click Save

🔅 Setup Favorites				
F	3			
2	Chart Tab	Favorite		
	НРІ	~		
	Vitals	✓	\sim	
	History	✓		
	Allergies	✓		
T	Immunizations			
	ROS	✓		
	Exams	✓		
	Exams	✓		
	Assessment	✓		
	Order Entry	✓		
	Medications	✓		
	Superbill	✓		
	SOAP Notes	✓		
_	Letters	✓		
	Problem List	✓		
	Flowsheets	✓		
	Chart Share			
	Obstetrics		~	
	<pre> Company Company</pre>	` >	_	

Setup Sections

Right click in the Patient Photograph or Patient AMP area to display Setup Sections option – mark each area to enable and/or display expanded, then click Save

			Toet Patient Born 19 Jul 197	5(46v) Gender Unknown
				test est
ns	Pro Pro	oblems	Encounters	Patient Photograph
	No active problems		Future No Appointments Scheduled	
Setup Sections	x		No Appointments Scheduled Past	
Section Name Patient Photograph Patient AMP - Allergies Medications	Expanded Enabled		RR C. Weather. Message Request 05/01/2019	Patient AMP
- Problems - Results - Vitals Quick Picks	V V V V V V V V			Collapse All
E/M Coding	✓ ✓ >			Summary HPI Vitals History

EMR Office Schedule

The Office Schedule can be configured in the EMR to display a list of appointments for a specific resource or a group of resources. This allows a user the ability to navigate through a schedule without leaving the EMR portal.

Navigating to the Office Schedule

1. From the EMR Portal, the Office Schedule will be displayed on the far, left-hand side under the calendar



Note: Applicable practices/users may also have access to the Hospital Rounds and Dialysis Rounds schedule.

Setting up the Office Schedule

1. Select the Office Schedule bluebar to reveal the settings within the Office Schedule



2. Using the Pencil icon, select the resources that you wish to display in the Office Schedule settings



3. Select the resources you wish to include in your Office Schedule and select Save



4. Resources may be selected or deselected to display their schedule within the Office Schedule panel



Schedule Display Settings

Setting Name	Description				
	Displays the chief complaint for the scheduled				
Disp. Chief Complaint Patients to Display 7 Disp. Chief Complaint Disp. Chief Complaint Disp. Proceeding	appointment				
Disp. Appointment Status	Displays the appointment status				



For even more control, review the EMR Primary Appointment Color settings. Users may also choose to include EMR Secondary Appointment Color settings.

« Patient Charts 📑 •
Office Schedule
Thursday Feb 11, 2021 Checked-In: 1
Heinlein PA-C, Matthew L
Head, Blake A. (31y) 2:00PM - 2:30PM Checked-In, BCG
Blake, JOE L. (81y) 3:00PM - 3:30PM
Scheduled, Bladder Fulger

EMR User Preferences (Summary Settings)

The Summary Chart Tab in the EMR may be configured to a user's desired preferences. This gives a user a custom experience when navigating through a patient's chart in the EMR.

Summary Tiles

The Summary Tiles can be managed to include or/and exclude additional data when viewing a patient's chart.

1. Open a patient in the EMR (either from a scheduled appointment, or by searching for a patient)



2. From the Summary chart tab, right click over the middle of the tiles in the center of the screen

Rev 04/1	iewed 1/2017	Today		~	
	Clinica	Messages			
) recommends screening	g for high blood pressure	2		Train Me Window Print User Settings	
	Ti	meline		Screen Settings Company Settings	
D			\$ \$	Refresh Setup	
. Navigate to Se	tup				
Train Me Window Pri	nt				

4. Choose to Enable to Disable tiles displayed in the Top Section



Screen Settings Company Settings

Timeline Setup

Setup

S

ø

5. Select Save

S	etup	
ſ		
2	Top Section	
	Section Name	E
٤ 🗖	Allergies	
4	Medications	
	Problems	
-		

6. The tiles at the top of the screen will update with your selections

Allergies	Medications	Problems	Encounters
Cipro Codeine Sulfa (Sulfonamides)	Advil 200 mg tablet Tegretol XR 100 mg tablet,extended release	Rheumatic heart failure Chest pain, unspecified Type 2 diabetes mellitus without complications	Future No Appointments Scheduled
Reviewed 04/11/2017	Reviewed 04/11/2017	Reviewed 04/11/2017	Today V
	Clinical	Messages	
The U.S. Preventive Services Task Force (USPS in adults age 18 years and older.	TF) recommends screening for high blood pressure		Ν
	Tim	eline	62
Medications		\checkmark	

Timeline Display

Users may choose to update the order of items that are display within the Timeline on the Summary screen.

1. Open a patient in the EMR (either from a scheduled appointment, or by searching for a patient)



2. From the Summary chart tab, right click over the middle of the tiles in the center of the screen

		Reviewed 04/11/2017	Today		~	
		Clinical	Messages			
) recomm	ends screening for high blood pressure	 		Train Me Window Print User Settings	_
		Tim	neline		Screen Settings Company Settings	_
	D			ර බ	Refresh Setup	-
3.	Navig	ate to Setup Train Me Window Print				
	- <u>\$</u>	User Settings Screen Settings Company Settings				
	Ø	Setup				

4. Choose to enable or disable sections that are displayed on the Timeline



5. Rearrange the order of the sections by single-selecting an item and using the "up" and "down" arrows to organize the order of items



6. Select Save



7. The Timeline will update with your selections

Retrieving Timeline	
Medications	
Notes	
Immunizations	
Order Results	
Communications	
eDocuments	
Vitais	
Health Exchange	
Telehealth	
🖹 🎯 🔥	>

Reorganize Chart Tabs

Users are encouraged to reorganize the order in which the chart tabs are displayed. This gives the user a more customized experience in the system.

1. In the lower, right-hand corner of the screen, right-click over the Chart Tabs area



3. Choose to enable or disable Chart Tabs that are displayed on the list



4. Rearrange the order of the Chart Tabs by single-selecting a Chart Tab and using the "up" and "down" arrows to organize the order of Chart Tabs

-	release			Type 2 diabetes mellit	u
		Ö	Setup Favorites	x	
		P			
			Chart Tab	Favorite	11
			HPI	✓	
	Move the se	lecte	d section up	✓ ^	
e	commends s		History	 ✓ 	
		4	Allergies	✓	
		T	Immunizations		
			ROS	✓	
			Exams		
			Exams	✓	F
			Assessment		
			Order Entry	✓	
			Medications	✓	
			Superbill	✓	
5. S	Select Sav	е			
	Jt Oatur	-	I voe 2 (
	C Setup	Fa	/orites		
	E				
	hart T	ab			
	HPI				

- s Vitals History
- 6. The Chart Tab list will update with your selections

Chart Tabs	×
Summary	
HPI	~
Vitals	
History	
Allergies	
ROS	
Exams	
Order Entry	
Medications	
Superbill	
SOAP Notes	
Letters	\sim
Production of the	

Vitals Chart Tab

The Vitals Chart Tab allows a user to document various vitals signs for a patient encounter. The Vitals screen can be viewed using either the English or the Metric units. Vitals can be entered manually by visit or can be copiec forward from a previous visit.

Adding New Vitals

1. Begin by navigating to the Vitals Chart Tab



2. Complete fields by simply entering numeric values for each desired field

Vital Signs	 English 	Metric										
					Glucose				✓ BI	лı	22.71	
Height	5 ft	7 in			Weight	145	lbs		ozs BS	SA	1.76	
Temperature	98.6 F	Oral	✔ м	ethod	Respiratio	n	Brea	aths/Minut	te Bo	dy Fat		%
Head Circ.	in	Neck Cir	с.	in	Waist Circ		in		Hi	p Circ.		in
Percentiles												
Head Circ.	%	W for L		%	BMI		%					
Blood Press	ure/Pulse											
	Systolic Dia	stolic		Extre	mity	Pulse	e			Rhythm		
Sitting	120 / 80) mmHg	Left L	Jpper Ex	tremity 💉	60	Bea	ts/Min	Regular			~
Standing	/	mmHg			``	•	Bea	ts/Min				~
Supine	1	mmHg			``	/	Bea	ts/Min				~
Pulse Oxime	try											
Heart Rate	Beat	s/Min		C	0 ₂ Saturatio	n	%	Delivery	Method			×
Extremity			~	F	10 ₂			Flow			Liters/Mi	n
Pain Assess	ment											
Under 8 Non-Eng	years old or glish speakin	No 9 Pain	0 0 0 1	0 C 2 3	0 0 4 5	0 0 6 7	0 0) () 9 10	Worst Pain			

3. Select Save or navigate to a new chart tab to save all values

🗄 Defaults 🛛 🛄 Patient	t 🔻 👓 More 🔻
Glucose	► E
Weight	145 lbs ozs E
Method Respiration	n Breaths/Minute B
in Waist Circ	. in H
	Defaults E Patien Glucose Weight Method Respiratio in Waist Circ

Note: By entering the patient's height and weight, the BMI will automatically calculate and display in the Patient AMP.

Patient AMP	^
Essential hypertension (disorder)	
Asthma Accident and Emergency atten	
Asthma (disorder)	
Left lower quadrant pain	
Unspecified atrial fibrillation	
Vitals BMI: 18.61 on 11/09/2020	
Results	~
Chart Tabs	×
 Summary 	
HPI	^

Viewing Previous Vitals

Users may need to review previous vitals records before documenting new vitals. They may also choose to graph records to display trends in their completed SOAP Note.

1. From the Vital Signs entry screen, navigate to the History button in the toolbar

New	Save	History	• 🖹 Defa	ults	• •	•• More	-
	Joave	THORAT	Dela			More	
Vital Signs	Eng	lish 🔿 Métri					
				Glucose			mg/dL
Height	5	ft 7.00 i	n	Weight	145	j Ibs	0.
	00.00						

2. The history screen displays previously saved Vitals records

C	N [ew	🖺 Save 📝 Details	- 🗋 Сору	E Patient	••• More 🔻				
	Vitals Summary								Row 1 o	f 37
		<u>hi</u>	➡ Date	Height	Weight	Head Circ.	Temp.	B/P	Pulse	
	1		02/11/2022 4:18PM	5 ft, 7.00 in	145 lbs		98.60 F	120/80 mmHg	60 Beats/Min	
	2		11/09/2020 3:54PM	6 ft, 2.00 in	145 lbs					
	3		04/24/2018 1:29PM	6 ft, 1.00 in	190 lbs					
	4		08/01/2016 4:29PM	7 ft, 1.00 in	600 lbs					
	5		08/01/2016 4:27PM	5 ft	120 lbs					

HPI Chart Tab

History of Present Illness (HPI) chart tab is used to document any development of the patients' present illness that was discussed during an office visit. It is an encounter-based chart tab where data differs from encounter to encounter. If the data does happen to be the same or similar there is an option to copy forward from the previous encounter. HPI templates vary based on the specialty of the practice.

Access HPI Chart Tab

1. Open patient in EMR from scheduled visit. Select HPI Chart Tab

Chart Tabs	~
Summary	
Problem List	^
History	
Allergies	
Vitals	
ROS	
HRI	U
E∜ ^j ms	•
And the Distance	*

2. Select HPI Template from drop down if more than 1 template

🗋 New 🖺 Save 🧐 History 🔹 🖃 Defaults 🔚 Patient 🔹 🚥 More 🔹	
Template History of Present Illness	
Summary	
Type of Visit	•
Chief Complaint	▼
Patient Reported	▼
Neck/Head Pain	•

Pro Tip: Users may save a default template that automatically loads in the User Setup

3. If your practice has multiple HPI templates, use drop down to access additional HPI templates

🗋 New 🖺 Save 🧭 History 🔹 🖻 Defaults	Ratient ▼ ••• More ▼	
Template		
Orthopedic	Summary	
History of Present Illness*		
General HPI		

Menu Bar

1. New- Select the New icon to document a new or additional HPI.

New 1	🖺 Save 🚺 History	▼ Defaults	E Patient	▼ ^{●●●} More
12				
Template			~	

2. Select the Save icon to save the current HPI

🗋 New	💾 Save	🕙 History	🔹 📑 Defaults	E Patient	••• More	•
Template				~		
				Summary		

3. History/Details icon. Toggles between current template to history of past templates for that patient

🗋 Nev	w 💾 Save	e 🖸 History 🔻 📑 Defau	its 📘 🔁 Pa	tient 🔻 °°° More 🔻						
Templa	Template History of Present Illness* V Howard, Carole 12/16/2021 4:55PM (ED									
The pa	The patient, is a 31 year-old Female here today for a new patient evaluation.									
Chief	Complaint	au Baak Daia DD UED CEDV	0041							
The pa	atient has trie	d and failed a Physician-Reco	mmended H	lome Exercise Progran	(HEP) for c	ervical spine	pain of at			
least 6 weeks over the last 3 months to include side-to-side neck tilts, neck flexion, extension and rotations, shoulder rolls, overhead arm stretches/presses, scapular squeezes, single arm row, standing wall pushups and cross arm shoulder										
		sitosipitosoos, oodpalai oquoo	cos, single a	ann row, standing wair j	Justicips and	cross arm sn	louider	*		
stretch	nes.		Tu	rne of Visit		cross arm sn	louider			
stretch	ies.		Ty Chie	/pe of Visit		cross arm sn		• •		
stretch			Ty Chie	pe of Visit		cross arm sn		v		
stretch	v Bave	Details V 🗗 Copy	Ty Chie	rpe of Visit ef Complaint		cross arm sn		v v		
Stretch	v Bave	Details	Ty Chie	rpe of Visit ef Complaint ient en en worker		cross arm sn	Row	▼ ▼ 1 of 1		
Stretch	v I Encounter His	Details ▼ B Copy tory Template Name	Ty Chie	pe of Visit ef Complaint ient Created By		Cross arm sn	Row	▼ ▼ 1 of 1		
Stretch	v I I Save Counter His ✓ Encounter 12/16/2021	Template Name History of Present Illness*	Ty Chie	rpe of Visit ef Complaint ient Created By Trainer, Test	Hov	Modified E vard, Carole	Row 3y	▼ ▼ 1 of 1 12/1		

4. The Copy icon is available when viewing the History. Click Copy to copy selected HPI to current template

🗋 Ne	w 💾 Save	📝 Details 🔻	🗋 Сору	🔝 Pati	ent 🔻 °°° More 👻			
Encounter History Row 1 of								
	 Encounter 	Template Name			Created By	Modified By		
1	12/16/2021	History of Present Illness*			Trainer, Test	Howard, Carole	12/1	

5. Patient Index/Patient Drop Down

Easy access to these menu items from the HPI Chart Tab

🗋 New 🖺 Save 🕄 History 🔻 📑 Defaults		Patient 🔽 👓 More 🔻		
Template History of Present Illness*		Commen	12/16/2021 4:55PM (ED	T)
The patient, is a 31 year-old Female here today for a		Communication Patient Communications		
Chief Complaint: Low Back Pain PR-HEP CERVIC/	4	Care Team Hospital Round History		
The patient has tried and failed a Physician-Recomm least 6 weeks over the last 3 months to include side- overhead arm stretches/presses, scapular squeezes stretches	<u></u>	Open Patient in Billing Room Assignment	P) for cervical spine pain of at sion and rotations, shoulder rolls, ups and cross arm shoulder	~
		Print / Fax Queue		¥
1		Recail		• •
	6	MyMedicalLocker Admin	-	¥
		Intake Assignment		•
		Close Patient Mid-Back Pain		•

6. ...More print

Select ... More/Print to print the HPI

🗋 New 🖺 Save 🕙 History 🔻 🕒 Defau	lts 🔚 Patient 🔻 👓	•• More 🔻			
Template History of Present Illness*	🗸 Howard, C	Print	0	12/16/2021 4:55PM (ED1	F)
		- Enserve	to a m		-
	Europani -	Encoun	lier de		
	Summary				
The patient, is a 31 year-old Female here today for	or a new patient eval	Audit			
···· p=====; ·· · · · · · · · · · · · · · · ·					
		Default	Setup		~
			•		
Chief Complaint: Low Back Dain DD HED CEDV		Train			
Chief Complaint, LOW Dack Failt FR-HEF OLKV	IOAL I				
The patient has tried and failed a Physician-Reco	mmended Home Exerci	ise Progran	n (HEP) for	cervical spine pain of at	
least 6 weeks over the last 3 months to include sid	de-to-side neck tilts nec	ck flexion e	extension ar	nd rotations, shoulder rolls,	
everbead arm stratebox/ereases, esapular equas	co cinclo arm row, eta	anding wall a	aughung an	d aroon arm abouldor	\sim
overneau ann sireicnes/presses, scapular squeez	es, single ann row, star	anding wall p	pushups and	u cross ann snouidei	
-ii-b					

		Page	±1 of 1		
	Willow T3s	st	History of Present Illness		
	Chart Number: 9330 DOB: 01/01/1990 Age: 31y Home Phone: (254) 515-8741 Gender: Female Address: 123 Test Lane		Services Provided at:	Comprehensive Spine Inst	
	Chief Complaint	Winter Garden, FL 34787	Encounter Date:	12/16/2021	
ief Complaint: Lo e patient has tried tion, extension and	w Back PainPR-HI and failed a Physic d rotations, shoulde	EP CERVICAL cian-Recommended Home Exercise Progr er rolls, overhead arm stretches/presses, :	ram (HEP) for cervical spine scapular squeezes, single ar	pain of at least 6 weeks over the last 3 months to include side-to-side neck tilts, ne m row, standing wall pushups and cross arm shoulder stretches.	
NSERVATIVE CA e patient has exha in medications and commended home omments: HPI Phr	RE usted numerous co l other pharmacoth exercise program ase 1	onservative treatment options in the past i erapy, physical therapy, posture correction (PR-HEP), and other interventional procession	ncluding non-steroidal anti-in ns, various manipulations an dures/surgeries when approp	flammatory medications, prescribed and OTC pharmacologic management includi d other therapies such as chiropractic and acupuncture, ice and heat, a physician- nate.	
d line of phrase					
formation included	in this report is co	nfidential.			

7. ...More Default Setup

Select to create a Default template

🗋 New 🖺 Save 🖏 History 🔻 🕒 Defautts 🛃 Patient 🝷		More 🔻	
	_−	Print	
Template History of Present Illness* V Howard, C	6	1	12/16/2021 4:55PM (EDT)
		Encounter Date	
Summary			
The patient is a 31 year-old Female here today for a new patient eval	\odot	Audit	
	Q	Default Setup	~
	-	dm	
Chief Complaint: Low Back Pain PR-HEP CERVICAL	te.	Train 🗸	
The patient has tried and failed a Physician-Recommended Home Exe	ercise	e Program (HEP) for cer	vical spine pain of at
least 6 weeks over the last 3 months to include side-to-side neck tilts,	neck	flexion, extension and r	rotations, shoulder rolls,
overhead arm stretches/presses, scapular squeezes, single arm row,	stand	ling wall pushups and ci	ross arm shoulder
		5	

Using Default Templates

To load a saved Default for an HPI template, click on the **Defaults** icon which will display a list of default options, select the default to load

🗋 New 💾 Save 🚺 History 🔻	Defaults 🛃 Patient 🔹 👓 More 🔹	
Template History of Present Illness*	Select Default to Apply X	
	My Defaults Med Check New Patient Procedure Folld	
		• • • • • • • • • • • • • • • • • • •
	~	v v v
	Clear Template	•

Merge Intake

Intake Templates can be built for a patient to complete on the My Medical Locker that merge to an HPI templates. If there is intake data to merge, this will be indicated by a blue dot. Select the HPI chart tab, and select the items to merge

Intake HPI			X Patient Photograph
Intake New Patient	Merge Template History of Present Illness*	Due Posted 12/17/2021 11:25AM (EI	т)
Field Name	Current Value	New Value	
Please review the follow Templates What is the main reason you	ving changes		
are here today:		Right knee injury	Patient AMP
✓ Date:		11/02/2021	X Allergies
Explain Injury:		Heard something pop	No active allergies
Is your pain related to an ✓ open/active auto accident, personal or work injury: Yes	Ν	Υ	No current medicati
Work or Personal Injury: Yes	N	Υ	Problems
Work or Personal Injury Date:		11/02/2021	Spondylolysis, lumb
Are you working with an Attorney due to injuries related to an auto accident/PIP/work injury: No	N	Y	Vitals
How long has pain/symptom been present (months):		2	Chart Tabs
Type of Pain: Sharp	N	γ	Problem List
✓ Type of Pain: Shooting	Ν	Y	History Allergies Vitals
✓ Display Only Changes		Merge Into Chart	npleted • ROS
		<u> </u>	immunizations

ROS Templates

Add a new ROS

Reviewed

10/02/2019

1. Once in a patient's chart, select the **ROS** chart tab.



2. The **ROS** screen will load.

emplate Review of Systems	~			
	Summar	у		
	ROS			Δ
Constitutional Temperature (°F) Chills Muscle Aches Poor Appetite Poor Sleep Night Sweats Weight Gain Weight Loss Comments	Yes No Gen Image: Present and the state of	nitourinary quency jency sitancy cturia nary Incontinence maturia nale gnant gular Menses	Yes	No
Cardio/Respiratory SOB Wheezing DOE Edema LE's CP Palpatations	Yes No Mis Abr Dys U Dys	sed Menses normal Vaginal Bleeding spareunia jinal Discharge suria le nile Discharge sctile Dysfunction	Image: Provide the second seco	□ □ ■ ■ ■ ■ ■

3. Then you can either click all of the necessary boxes for this patient OR you can click the **Defaults** button. This will check all the normal boxes and then you can edit as needed.

New	🖺 Save 🚺 History 🔹 📑 Defaults 🔚 Patient 🔹	••• More 🔻
Template	Review of Systems	
	Summary	

4. Select either the [Base] Practice Defaults or one of the custom user default templates.

elect Default to Apply	,
Group Defaults	
[Base]	
Dr Carly Default ROS	
~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~	

5. Document the patient's Review of Systems as appropriate.

Template Review of Systems	~				
		Summary			
Constitutional: No Chills, No M No Weight Loss. Cardio/Respiratory: <u>Positive</u> Extremities, No Chest Pain, No Genitourinary: No Frequency, Neurological: No Headache, N	/luscle Aches, No Por Shortness of Breath Palpatations, No Ort No Urgency, No Hes Io Dizziness, No Wea	or Appetite, <u>Positive Poor Sleep</u> , No N 1. <u>Positive Wheezing</u> , No Dyspnea on I hopnea, No Cough, No Hemoptysis, No itancy, No Nocturia, No Urinary Incontir akness, No Difficulty Walking, No Numbi	ight Sweats, N Exertion, No Ed Sputum. ience, No Hem ness, No Tingli	o Weight G dema in Lo naturia. ng.	Gain, ower
-		ROS		4	Δ 🔺
Constitutional	1000 C 1000	Genitourinary	Yes	No	
Temperature (°F)	Yes No	Frequency			
Chills		Urgency	Ē		
Muscle Aches		Hesitancy	Ē		
Poor Appetite		Nocturia	ñ	~	
Poor Sleep		Urinary Incontinence	Ē		
Night Sweats		Hematuria	$\Box$		
Weight Gain		Female	Yes	No	
Weight Loss		Pregnant			
Comments		Irregular Menses	H	H	
	Vae No	Missed Menses	П	П	
Cardio/Respiratory	ies No	Abnormal Vaginal Bleeding	n i	Ē	
SOB		Dyspareunia	ñ	Ē	
Wheezing		Vaginal Discharge	Ē	$\square$	
DOE		Dysuria			
Edema LE's		Male	Yes	No	
CP		Penile Discharge			
Palpatations		Erectile Dysfunction	H	H	
Orthopnea		Comments			ή
Cough		Musculoskeletal	Yes	No	-
Hemoptysis		Inium			
Sputum 🗸		injury			

6. Once you have it completed, click Save.



## **Edit an Existing ROS**

1. Once in a patient's chart, select the **ROS** chart tab.



2. Click on the History button from the menu bar at the top of the screen.



3. Double click on the ROS entry that you want to edit.

	🗋 New 🛛 🔚 Save 🛛 🗹 Details 🔹 🖓 Copy 🛛 🚨 Patient 🔹 🎯 More 🔹								
4	Encounter History Row 1 of 42								
		<ul> <li>Encounter</li> </ul>	counter Template Name Created By Modified B						
	1	10/24/2019	Review of Systems	Rivers, Kelly	Rivers, Kelly				
	2	07/10/2018	Review of SystemsM	Head, Blake	Head, Blake				
	3	02/19/2018	Review of Systems	Rivers, Kelly	Rivers, Kelly				

4. The existing ROS will load, make the necessary changes.

New 🔒 Sav	e 🛛 🚱 His	tory 🔻	🛃 Defaults 🛛 🚨 Patie	ent 🔻	More	• •			
Template Review	of Systems		V Rive	rs, Kelly			10/24/2	019 1:2	9PM
Summary									
Constitutional: No Fever.     Immunologic: No Latex Allergy.     Neurological: No Decreased Sensation.     Gastrointestinal: No Constipation.     Respiratory: No Shortness of Breath.     Ear/Nose/Throat/Mouth: No Hearing Loss.     Hematologic: No Easy Bruising.     Musculoskeletal: No new bone pain.									
1			R	DS .					Δ
Constitutional	Yes	No	Respiratory	Yes	No	ENTM	Yes	No	
Fever		1	Shortness of Breath		-	Hearing Loss		*	
Comments			Current tobacco no	on user		Comments			
			Tobacco Use Scree	ening/ Ce	essation				
			Comments	N/					
Cardiovascular	res	NO	Gastrointestinal	res	NO	Musculoskeletal	res	NO	
Chest Pain		1	Constipation		-	New Bone Pain		1	
Comments			Comments			Comments			
Hematologic	Yes	No	Neurological	Yes	No	Immunologic	Yes	No	
Easy Bruising			Decreased Sensation		-	Latex Allergy		-	
Comments			Comments			Comments			
Genitourinary	Yes	No	Pain	Yes	No	ВМІ			
Leak Urine/ Wet Se	elf 📃	-	Are you experiencing		~	BMI is normal			
Comments			pain?		•	BMI is abnorma	I - low		
L			Comments			BMI is abnorma	I - high		
						Current Meds			
						Documented			
						Not Documented	d		

5. Press **Save** when you are done adding all changes.

🗋 New 📙 Save 🥼 History 🔻 🋃 Defaults	🚨 Patient 🔹 🏵 More 🔹
Template Revie MSystems	Rivers, Kelly
	Summary
Constitutional: No Fever.     Immunologic: No Latex Allergy.     Neurological: No Decreased Sensation.     Gastrointestinal: No Constipation.     Respiratory: No Shortness of Breath.	

# **Copy an ROS from a Previous Encounter**

1. Once in a patient's chart, select the **ROS** chart tab.



2. Click on the **History** button from the menu bar at the top of the screen.

New Rave	🚯 History 🔹	Defaults	Patient	▼   More ▼
Template Review of	Systems		*	
	$\overline{}$		Summar	у
Constitution     Immunologia     Neurologica     Gastrointesi     Respiratory     Far/Nose/Th	al: No Fever. c: No Latex Allergy l: No Decreased S tinal: No Constipat : No Shortness of f : No Shortness of No H	/. iensation. tion. Breath. earing Loss		

- Respiratory: No Shortness of Breath.
   Far/Nose/Throat/Mouth: No Hearing Loss
- 3. Click once on the ROS entry that you want to copy forward.

N 🗋	🗋 New 🛛 🔚 Save 🛛 🗹 Details 🔻 🖹 Copy 🛛 🚨 Patient 👻 🎯 More 👻								
Encounter History Row 1 of 42									
	<ul> <li>Encounter</li> </ul>	Template Name	Created By	Modified By					
1	10/24/2019	Review of Systems	Rivers, Kelly	Rivers, Kelly					
2	07/10/2018	Review of SystemsM	Head, Blake	Head, Blake					
3	02/19/2018	Review of Systems	Rivers, Kelly	Rivers, Kelly					

4. Then select **Copy** from the menu bar.

🗋 Ne	w 📙 Save	🗹 Details 🔻 🕒 Copy 🚨 Pa	itient 🔹 🎯 More 👻						
Encounter History									
	<ul> <li>Encounter</li> </ul>	Template Name	Created By						
1	10/24/2019	Review of Systems	Rivers, Kelly	Riv					
2	07/10/2018	Review of Systems	Head, Blake	He					
3	02/19/2018	Review of Systems	Rivers, Kelly	Riv					
4	10/11/2017	Review of Systems	Arbuckle Tammy	Δri					

5. The previous encounter ROS will load, make the necessary changes.

📄 New 🛛 🔚 Save	History     History     History     Second	🔹 🄄 Defaults 🛛 🚨 Pat	iient 🝷 🎅 More	• •					
Template Review of	f Systems	V Riv	ers, Kelly	10/2	24/2019 1:29PM				
		Sur	nmary						
Constitutional: No Fever.     Immunologic: No Latex Allergy.     Neurological: No Decreased Sensation.     Gastrointestinal: No Constipation.     Respiratory: No Shortness of Breath.     Ear/Nose/Throat/Mouth: No Hearing Loss.     Hematologic: No Easy Bruising.     Musculoskeletal: No new bone pain.									
1		R	los		Δ				
Constitutional	Yes No	Respiratory	Yes No	ENTM Ye	s No				
Fever	Image: A start of the start	Shortness of Breath	<b></b>	Hearing Loss	<b></b>				
Comments		Current tobacco n	ion user	Comments					
		Tobacco Use Scre	eening/ Cessation						
		Comments							
Cardiovascular	Yes No	Gastrointestinal	Yes No	Musculoskeletal Ye	s No				
Chest Pain	A 10 10 10 10 10 10 10 10 10 10 10 10 10	Constipation	<b></b>	New Bone Pain	✓				
Comments		Comments		Comments					
Hematologic	Yes No	Neurological	Yes No	Immunologic Yes	No				
Easy Bruising		Decreased Sensation	<b></b>	Latex Allergy	-				
Comments		Comments		Comments					
Genitourinary	Yes No	Pain	Yes No	BMI					
Leak Urine/ Wet Self		Are you experiencing		BMI is normal					
Comments		pain?	<b></b>	BMI is abnormal - low					
L		Comments		BMI is abnormal - high					
				Current Meds					
				Documented					
				Not Documented					

6. Press Save when you are done adding all changes.



## **User Template Defaults**

# **User Template Defaults**

Users can setup and use template default values for HPI, ROS, Exam, Assessment, Treatment Plan and Order Fulfillment templates

## **Creating Default Templates**

#### You can create a Default Template following these steps:

1. Click on the EMR Portal

🎉 Setup
Reports
💆 EMR 🃊
iScheduler
🏥 Billing

2. Open a test patient's chart using the Patient Search

			test patie	x 🔍 🗸
9401	Patient. Test		01/01/2001	X Male
9328	Test, Patient	lha	07/19/1975	Female
2 results		3		New

3. Click on the Chart Tab to set template defaults for, i.e. Exam.

Chart Tabs	¥
Summary	
Problem List	~
History	
Allergies	
Vitals	
ROS	
HPI	
Immunizations	
Exams Im	
Obstetrics	
Assessment	
Treatment Plans	~
Order Entry	

4. Select the Template to set default values for.



5. Select the More menu and then Default Setup option

🗋 New 🖺 Save 🖏 History 🝷 🗗 Defaults 🗮 Patient 🔻		More 🔻	
Template Physical Exam		Print	h
Summary		Encounter Date	F
Juninary	0	Audit	F
	Ö	Default Setup	L
	P	Train 🖑	l

6. Press the **New** button.

New	Delete	Save

7. Enter a Name for the set of defaults

Name *	Limited Exam	×
Tooltip		^
		~

8. Check the Only for Me checkbox to keep the defaults private to your user id.



9. Go through the template and set the default value.

Summary								
<ul> <li>Incision: intact.</li> <li>ENT: normal left ear, normal right ear, normal upper lip, normal lower lip, normal otoscope, normal throat, normal teeth.</li> <li>Eyes: Pupils equal, round, reactive to light, normal conjunctiva, normal sclera.</li> <li>Gastrointestinal: no HSM.</li> <li>Neurologic: Alert and oriented x 3.</li> <li>Genitourinary: Testes down, no masses, no hernia, no inguinal lymphadenopathy, no suprapubic tenderness.</li> </ul>								< >
- →				Exam			Δ	
General	Norm	Abnx	Details	Gastrointestinal	Norm	Abnx	Details	^
No Acute Distress	~			Soft				
Appears Stated Age				No Tenderness				
Obese				Normoactive Bowel Sounds				
Well Developed	~			No HSM	✓			
Well Nourished				No Rebound				
Skin	Norm	Abnx	Dotaila	No Guarding				
Warm			Details	No Masses				
No Dach/ Bruicas/ Lasions				No Hernia				
No Rasil/ Didises/ Lesions				Extremities	Norm	Abnx	Details	
Incision	Norm	Abnx	Details	Intact distal pulse w/o C/C/E				
Clean				No Edema				
Dry				Neurologia	Norm	Abnx	Detaile	
Intact	~			Alert and Oriented v 3				
No erythema				Crapial Nerves 2 12 intact				
No drainage				Granial Nerves 2-12 Intact				

10. Press the Save button.

Pro Tip: You can create multiple defaults for the same template.

## **Using Default Templates**

Default Templates that are saved can be loaded in the EMR utilizing the following steps:

 Load the template that has saved defaults and click the **Defaults** tab for a list of saved User Defaults. If there is only one default for that template, simply click the **Defaults** tab

New Save	🕙 History 🔹	🗎 Defaults 🔚 Patient 🔻 👓 More	•			
Template Physical E	kam	Select Default to Apply	X			
		Group Defaults [Base] Comprehensive Detailed Limited Post op	^			
Ceneral	Norm At			Norm	Abnx Details	<u> </u>
No Acute Distress						
Appears Stated Age						
Obese			$\sim$	s 🗌		
Well Developed						
Well Nourished		Clear Template				

2. The items/clicks for that User Default will load into the template

Template	Physical Exam			~					
					Summary				
<ul> <li>Incision: intact.</li> <li>ENT: normal left ear, normal right ear, normal upper lip, normal lower lip, normal otoscope, normal throat, normal teeth.</li> <li>Eyes: Pupils equal, round, reactive to light, normal conjunctiva, normal sclera.</li> <li>Gastrointestinal: no HSM.</li> <li>Neurologic: Alert and oriented x 3.</li> <li>Genitourinary: Testes down, no masses, no hernia, no inguinal lymphadenopathy, no suprapubic tenderness.</li> </ul>							< >		
₽ ✓					Exam			Δ	
General		Norm	Abnx	Details	Gastrointestinal	Norm	Abnx	Details	
No Acute	Distress	✓			Soft				J
Appears S	Stated Age				No Tenderness				
Obese					Normoactive Bowel Sounds				
Well Deve	eloped	✓			No HSM	~			
Well Nour	ished				No Rebound				
Skin		Norm	Abnx	Detaile	No Guarding				
Warm				Detana	No Masses				
No Dash/	Bruises/Lesions				No Hernia				
NO Rashi	Didises/ Lesions				Extremities	Norm	Abnx	Details	
Incision		Norm	Abnx	Details	Intact distal pulse w/o C/C/E				
Clean					No Edema				
Dry					Neurologic	Norm	Abnx	Details	
Intact		~			Alert and Oriented x 3	~			1
No erythe	ma				Cranial Nerves 2-12 intact				
No draina	ge				Power/ Strength				ĺ
No infectio	on				Sensorv				í
Tenderne	SS		~		Gait				í
Head		Norm	Abnx	Details					1
Normocep	halic				Musculoskeletal	Norm	Abnx	De tails	
Atraumatio	c				ROM				
ENT		Norm	Abnx	Details	No Tenderness				
Left Ear		~			No Deformity				
Right Ear		~			No Swelling			+LE 🛛 🗸	
Upper Lip		~			No Masses				
Lower Lip		~			Genitourinary	Norm	Abnx	Details	~
Otococo		. 1			_	_	_		1

3. To clear the default that was loaded, select Clear Template and this will unmark any checked boxes or

notes that were saved as a part of the User Default

🗋 New 💾 Save 🕄 History 🔻	🕂 Defaults 🔚 Patient 🔻 👓 More	e <b>-</b>	
Template Physical Exam	Select Default to Apply	X	
<ul> <li>Incision: intact.</li> <li>ENT: normal left ear, normal teeth.</li> <li>Eyes: Pupils equal, round, re</li> <li>Gastrointestinal: no HSM.</li> <li>Neurologic: Alert and oriente</li> <li>Genitourinary: Testes down,</li> </ul>	Group Defaults [Base] Comprehensive Detailed Limited Post op	^	otoscope, normal throat, normal
General Norm At			Norm Abnx Details
No Acute Distress		~	s
Well Nourished	Clear Template No Guardh-s		

Pro Tip: You can edit a saved Template Default by clicking the **More** menu and then **Default Setup.** Select the default to change, make changes and click **Save.** 

## Surgery Ordering Overview

# Surgery Ordering Overview

A surgical practice needs an effective workflow for managing the ordering and scheduling of surgeries and procedures. This guide will walk you through how to place an order for a surgery or procedure as well as saving default orders.

#### 1. Select Order Item

• Navigate to Orders Chart Tab, Click on Order Entry



• Select the Order Template to display the order options. Select the blue bar with the Surgery Orders (this will vary by practice)

Order Template	Orders	~	Ordered By	* Carole Howard	i	Q
		:	Summary		Assignment	
						^
						~
Template	Patient	Diagnosis	Physician	Search		
		F	ollow-Up Visit			•
		In-O	ffice Procedures			•
			Labs			•
			X-Ray			•
			MRI/MRA			¥
			CT Scans			¥
			DEXA			¥
			Therapy			•
		In	nmunotherapy			¥
			Referral			•
			Surgery			Δ
Ear Surgeries		Nasal Surge	eries	Throat Surgeries	3	շիս
Billateral Myri	ingotomy with Tubes	Septopla	asty	Tonsillectomy	/	$\cup$
Myringotomy	of Left Ear	Nasal Tu	urbinate Reduction	Adenoidector	ny	
Myringotomy	of Right Ear	Function	al Endoscopic Sinus	Tonsillectomy	and Adenoidectomy	У
Tympanoplas	ty of Left Ear	Balloon	Sinusplasty Surgery	Trachiotomy		
Tympanoplas	ty of Right Ear	Rhinopla	asty	Thyroidectom	ıy (Partial)	
Tympanomas	stoidectomy of Left Ear	Nasal C	autery	Thyroidectom	iy (Complete)	
Tympanomas	stoidectomy of Right Ea	ar Foreign	Body Removal in Nose	Thyroid Lobe	ctomy (Partial)	
Ossicular Re	construcion of Left Ear	Closed N	lasal Reduction	Thyroid Lobe	ctomy (Complete)	
Ossicular Re	construcion of Right Ea	ır		UPPP		
Foreign Body	Removeal in Left Ear			Micro DL with	n Biopsy	
Foreign Body	Removeal in Right Ea	r				

• Select the Surgery or Procedure

<b>√</b>	Surgery	Δ
Ear Surgeries	Nasal Surgeries	Throat Surgeries
Billateral Myringotomy with Tubes	K Septoplasty	Tonsillectomy
Myringotomy of Left Ear	W Nasal Turbinate Reduction	Adenoidectomy
Mvringotomv of Right Ear	Functional Endoscopic Sinus	Tonsillectomv and Adenoidectomv

• Ordered by

It is important that the Ordered by is the provider ordering the surgery or procedure. Click on the magnifying glass to change the Ordered By

Ordered By	*	Search for Users	្រាំក	
			$\sim$	x
		Alex Wade		awade
		Allison Bowlick		abowlick
cute recurrer	nt pa	Anthony Miller		amiller
		Ben T Stipes		ostipes
		Carole Howard		choward
		Carole Test		ctest
		Chandler Head		chead
		Christy T Stipes		stipes
ivsician		Clone Ward	1	vbclone
.,		Danielle Seals		dseals
Visit				
edures				
		10 of 46 results		New

Tip: The Ordered By can be defaulted to a provider or another user in the User Setup

#### 2. Summary Edit

• Click on the Order – this will open the Summary Item Edit Window. The Order Route and Processor are set by default.

Summary Iter	m Edit			x
Soap Text		Default Soap Text	Lab Instructions	
Septoplasty Su	rgery	$\sim$		$\hat{}$
Order Priority	Norm 🖌		Patient	~
Order Status	Open	~	Instituctions	
ICD Code	Click to Enter			*
Order Route	Surgery	~	Processor Office Staff	~

• Assign ICD Code (this can be also done when saving the order)

Summary Item Edit					X
Soap Text	Default Soap Text	Lab Instructi	ons		
Septoplasty Surgery for (Dizziness an Acute recurrent pansinusitis)	d giddiness,				0
	*				×
Order Priority Norm 🗸		Patient Instructions			~
Order Status Open	~				
ICD Code <u>R42, 10141</u>	-				Ť
Order Route Surgy	~	Processor	Office Staff		~
<b>√</b>	D	etails		Assignment	Δ

#### 3. Order Fulfillment

• An order for surgery or procedure will typically have an Order Fulfillment attached. This allows users to enter additional details for scheduling. Enter details for the surgery/procedure, then click Okay

Summary Iter	n Edit					X
Soap Text		Default S	oap Text	Lab Instructi	ions	
Septoplasty Su	gery		~			~
			$\sim$			~
Order Priority	Norm 🗸		,	Patient Instructions		~
Order Status	Open	~				U
ICD Code	Click to Enter					Ť
Order Route	Surgery	*	]	Processor	Office Staff	~
1			D	etails	Assignment	Δ
Surgeon: Dr. Jor	nes		✓ 0	ut-Patient	In-Patient	
Surgery Date: 0	1/18/2022 ᅌ 💳	Time: 8:00 a	<b>m</b> .	Location	C General Surgery Center	
H and P Dictated	d: 🗸 Yes 🗌	No				
Labs: CB	С ВМР	🗸 PT 🗌 F	PT/PTT	EKG	UA Other	
Radiology:	CXR Other					
	TED Hose	Additional Orders	s:			
Meds/Pre-Op Ar	ntibiotics:					
Anesthesia Type	e: General	MAC 🖌 Loc	al 🗌	None Lengt	th of Procedure:	]
CT: Yes 🗸 No NAV: Yes 🗸 No						
Date:	Date: Facility: Ordered: Yes No					
Pre/Op Instruction Post/Op Instruct	Pre/Op Instructions Given:  Yes No Post/Op Instructions Given:  Yes No					
Special Equipment: Balloon 3.4 mm NaviBlade Propel Other:						
		🗘 De	fault Setu	p 📑 Default	ts OK Cancel	Apply

#### 4. Default Setup

This tool allows users to save options that are selected in the fulfillment

• Click on Default Setup (bottom of fulfillment)



- Click New to enter name and proceed to enter details for that surgery default, then click Save
- Load Default- click on Defaults for a list of saved defaults, select the default to load.



#### 5. Save Order

- When all details for the surgery/procedure are complete, click Save.
- Assignment-Associate diagnosis codes to the procedure, then click Save
| Assignment                                               |                                                                                        |                                                              |                                                        |                         |            | X        |
|----------------------------------------------------------|----------------------------------------------------------------------------------------|--------------------------------------------------------------|--------------------------------------------------------|-------------------------|------------|----------|
| All<br>✓ Surgery<br>✓ Septoplasty Surgery for (Dizziness | <ul> <li>✓ Code</li> <li>✓ J0141</li> <li>Code</li> <li>✓ R42</li> <li>R509</li> </ul> | Recent<br>Acute recu<br>Problem I<br>Dizziness<br>Fever, uns | Dia<br>irrent pansi<br>ist<br>and giddine<br>specified | gnosis<br>nusitis<br>ss |            | Q.       |
|                                                          | Priority Norm                                                                          | ~                                                            | Processo                                               | r Office St             | aff        | <u>}</u> |
| Surgery                                                  | Sun                                                                                    | nmary                                                        |                                                        |                         |            |          |
| Septoplasty Surgery for (Dizziness and                   | I giddiness, R                                                                         | 42,J0141                                                     |                                                        | Norm                    | Office Sta | ff       |
|                                                          |                                                                                        |                                                              |                                                        |                         |            |          |
|                                                          |                                                                                        |                                                              |                                                        |                         | Save       | Cancel   |

# Surgery Processing Overview

This guide will demonstrate how surgery scheduling staff can process an order once it has been placed in the EMR.

#### Access Order

Orders can be accessed for processing either from the EMR/Orders History or My Task Orders

#### 1. EMR/Orders History Access

• Click on History from Orders Template area

🗋 New 💾 Sav	ve 🕄 History 🔻	🕒 Defaults 🛛 🗮 P	atient 🔹 👓 More	•		
Order Template	Orders	~	Ordered By	* Talis Smith		Q
		Su	mmary		Assignment	
<ul> <li>Surgery - S</li> </ul>	eptoplasty Surgery fo	r (Acute recurrent pa	nsinusitis)			^
						~
Template	Patient	Diagnosis	Physician	Search		
		Foll	ow-Up Visit			•
		In_Offi	ce Procedures			

• Click on Orders Tab to see a list of patient's orders.

🗋 New 🖺 :	Save 📝 Details 🔹 🖻 Co	opy 🔚 Patient 🔻 👓 Mo	re 🔹		
Orders	Results				
Arranged By: Pri	prity				
🗆 Norm					
Procedure	s Septoplasty	12/03/2021 11:04AM (EDT)	Howard, Carole	Open Office Staff	Ò
Labs	TSH	03/05/2020 12:24PM (EDT)	Rivers, Kelly	Closed Office Staff	Ò
Radiology	Chest X-Ray PA and Lateral	03/05/2020 12:24PM (EDT)	Rivers, Kelly	Closed Office Staff	Ò
Schedulin	g Return to office in 6 weeks	03/05/2020 12:24PM (EDT)	Rivers, Kelly	Closed Office Staff	Ò
Labs	Basic Metabolic Panel	01/13/2020 10:14AM (EDT)	Kaiser, Adam	Cancelled eLabs	Ø

#### 2. My Task Orders Access

• Navigate to the My Tasks in the EMR and click on Orders. This will display a list of orders in which the current user is assigned as the process or processor group



• Sort-based on workflow- select the Arranged By to sort orders (i.e. if you schedule for a particular provider, you can arrange by "Ordered By" to see that provider's open orders to be processed)

🔒 🔸 Task Ord	ers			
Open Orders				
<ul> <li>Open Orders</li> <li>Unsolicited Labs</li> </ul>		133 0		
		्र 📙 🗕 🚊 🎓	s	
Arranged By: Order	2	Patient	1	
🗉 Date: Current	~0	Priority		~
🙎 Test, Patient Fe		Туре	9/1975	
Procedures		Order		12/03
🗉 Date: Older	~	Order Date		
🙎 Beasley, Kirby 🛛		Order By	/2017	
Labs		Appointment Date		01/15
Labs		Processor		01/15
Labs	7	Ailergen, Food Comprehensive II	5	01/15

#### Processing Orders

- 1. Order Processing window can be opened from EMR or My Task Orders
  - If accessing order from EMR, click on the yellow arrow to open the Order Processing screen

🗋 New 💾 Save 📝 Details 🔻 🗋	Copy 👫 Patient 🔻 👓 More 👻	
Orders Besults		
Arranged By: Priority		
Procedures Sentoplasty	12/03/2021 11:04AM (EDT) Howard Carola Open Office Staff	
I she TSH	12/03/2021 11:04AM (EDT) Howard, Carole Open Onice Stan	
Laus ISH Radiology Chart X Ray BA and Late	📄 Order Processing Webpage Dialog 💦 💦 💦	×
Schoduling Deturn to office in 6 was		Order #+ 258
Labe Rasis Matabalis Danal		01001 #1 230
Labs Allergen Food Compreh	Septoplasty	
Dadislam X Rev Chart Di and Lat	Test, Patient	
Radiology X-Ray Chest, PA and Lat	Female, Age: 46y	12/03/2021
Radiology CT Head/Brain w/contras	- Priority: Normal	
Radiology MRI Head/Brain W/Contra	st Fridity. Normal.	
Scheduling Follow-up in 1 day	Appointment: Surgery at 12/03/2021 00:00am. 💡	
Procedures Billaceral Myringocomy w	Processor: Office Staff (Open)	
Referrals Audiologist Referral		
Other Additory Brain Response	Rendering: Howard, Carole L. Referring: Smith Dr, Robert	ICD: J0141
Other Otrasound of the Neck	Responsible: Test, Husband Insurance:	Auth:
Other Fine Needle Asperation of	Ourses Outo dallar Obert News Cilling	
Other CPAP BI-Level	Surgery Scheduling Sheet - New: Edit >>	
	Surgeon: Dr. Jones, Out-Patient. Surgery: Date: 01/19/2022, Time: 8:00 a.m., Locatio Dictated: Yes. Anesthesia Type: Length of Procedure: 30 minutes. CT: Yes. Pre/Op Instructions Given: Yes, Post/Op Instructions Given: Yes	n: General Surgery Center. H and P

• If accessing order from My Task, click on order, the Processing screen will display on the right

🔒 🔹 Task Orde	rs						CI	hoice Training		
Open Orders				🖻 🖶 🖉 🖻	i 🔬 🛤 🧕 🖌 🗙		9 💉 🎓			
<ul> <li>Open Orders</li> <li>Unsolicited Labs</li> </ul>	133 0			Septoplasty						
	्र 🗄 - 🙎 🎓 🚺			Female, Next Apet	N/A				12/02/2021	
Arranged By: Order D	late				N/A				12/03/2021	
E Date: Current				Priority:	Normal.					
2 Test, Patient Fen	nale Next Appt: N/A Age: 46y 07/19/1975		^	Appointment:	Surgery at 12/03/2021 00	:00am. 🦁				
Procedures	Septoplasty	12/03/2021 11:04AM (EDT)	Howa	Processor:	Office Staff (Open)					
🗉 Date: Older	13			Rendering:	Howard, Carole L.	Referring:	Smith Dr, Robert	ICD:	J0141	
🙎 Beasley, Kirby M	ale Next Appt: N/A Age: 4.1y 10/04/2017			Responsible:	Test. Husband	Insurance:		Auth:		
Labs	Hematocrit	01/15/2020 1:42PM (EDT)	Jones							
Labs	Vitamin D-25 Hydroxy	01/15/2020 1:42PM (EDT)	Jones	Surgery Sched	uling Sheet - New: Edit >					
Labs	Allergen, Food Comprehensive II	01/15/2020 1:42PM (EDT)	Jones	Surgeon: Dr. Jone	s, Out-Patient. Surgery: I	Date: 01/19/202	22, Time: 8:00 a.m., I	Location: General	Surgery Center. H and P	
Radiology	CT Chest w/contrast	01/15/2020 1:42PM (EDT)	Jones	CT: Yes.	schesia rype: Length of F	roceaure: 30 n	ninutes.			
Radiology	CT Sinuses w/contrast	01/15/2020 1:42PM (EDT)	Jones	Pre/Op Instructions	Given: Yes, Post/Op Instr	uctions Given:	Yes			
Procedures	Adenoidectomy Surgery	01/15/2020 1-42PM (EDT)	loner							

#### 2. Processing options

• Order Priority – click on the word Priority to change priority, i.e. stat

-	Septoplasty Test, Patient Female, Next Appt: N/A Priority: Order Priority	×
	Appointm Processor Rendering Responsit	Priority Date
_	Surgery Scheduling Shee Surgeon: Dr. Jones, Out-Pati Dictated: Yes. Anesthesia Ty CT: Yes. Pre/Op Instructions Given: Ye	19/2022, Time: 8:00 a.m., Location: General Surgen e: 30 minutes. [#] Siven: Yes

- Appointment: this will display current appointment information
- Processor: The processor is set as default, i.e. Office Staff. The processor can be changed/re-routed by clicking on current Processor.
- This section also displays the status (open). Click on the words "open" to change to close.
- Rendering: The rendering provider for the order. This can be changed by clicking the name and searching for provider/user. Once the Requisition has been printed, this cannot be changed.
- Referring: This is the patient's referring provider in the Patient Setup.
- ICD: The ICD(s) associated to order. Based on Order type, this field can be set to required during the implementation process.
- Responsible: This pulls from the Patient Setup
- Insurance/Authorization: Enter authorization information, Insurance Coverage and/or Billing Type for the order

Insurance				X
Authorization				
Insurance				
	Payer		Coverage	$\sim$
	Blue Shield - Tennessee		1	
	Self Pay	1	2	
	Employee Plans, LLC	ů.	3	~
Billing Type	*		Cle	ose

• Scheduling details/fulfillment: Click to review/edit/update details for the surgery/procedure.

Septoplasty Test, Patient					
Female, Next Appt:	N/A				12/03/2021
Priority:	Normal.				
Appointment:	Surgery at 12/03/2021 0	10:00am. 🤗			
Processor:	Office Staff ( <u>Open</u> )				
Rendering:	Howard, Carole L.	Referring:	Smith Dr, Robert	ICD:	J0141
Responsible:	Test, Husband	Insurance:	Self Pay Bill Type: Dationt Bill	Auth:	
Surgery Sched	uling Sheet - New: Edit	>>	biii Type: Patient biii		
Surgeon: Dr. Jone Dictated: Yes. Ane CT: Yes. Pre/Oo Instructions	es, Out-Patient. Surgery: esthesia Type: Length of fm Given: Yes, Post/Op	: Date: 01/19/202 f Procedure: 30 m tructions Given: \	2, Time: 8:00 a.m., Locati inutes. ⁄es	ion: Genera	I Surgery Center. H and P

- 3. Save Order
- Click the Save button if any changes have been made to the Order

#### 4. Print Requisition

• Click the Print icon to print an Order Requisition, then OK in the Create Requisition screen



5. Right Click options

2021 11-04AM (EDT)	Hows
	📄 Requisition
	Status
	E Letter
2020 1:42PM (ED1	🥖 Diagnosis
2020 1:42PM (ED1	🖺 Сору
2020 1:42PM (ED)	Send Communication
2020 1:42PM (ED)	Create Reminder
2020 1:42PM (ED1	👮 Open Patient in EMR
2020 1:42PM (ED1	Den Patient in Billing
2020 1:42PM (ED1	Open Patient Setup
2020 1:42PM (ED1	Result Reporting
1	eDocuments
2020 11:06AM (ED	Patient Orders
2020 11:06AM (ED	Custom
	Comments
2020 1:41PM (EDT	Select Orders
2020 1:41PM (EDT	Unselect Orders
2020 1:41PM (ED)	Collapse All Groups
2020 1:41PM (ED)	Expand All Groups
2020 1.410M /ED71	Vird

- Requisition prints requisition
- Status change status of order, i.e. closed
- Letter allows user to print a letter, i.e. Consent Form

Consent	
Basic Procedure Consent	
Excuse 3	
Return to Work/School w/ limit	
MyMedicalLocker	
MML Welcome Letter	
New MyMedicalLocker Print Instructions	
New MyMedicalLocker Welcome Letter	
Patient	
Financial Policy	
Patient Generic Letter	

- Diagnosis update or add diagnosis to the order
- Copy creates a copy of the order with options to copy values from diagnosis and/or fulfillment details

	Check any of the Order(s)	you wish to copy then select "Copy".	
	Procedures Septoplasty	12/03/2021 11:04am Open Office Staff Howard, Carole 9328 Test, Patient	
		Conv Order	
		Encounter 12/03/2021	
		Connect order to current appointment	
		Copy Diagnosis records	
		Copy fulfilment values	
		Сору	
10	rder can be edited by clicking on t	te Order Description, which is underlined or its corresponding copied flag (also underlined).	0.001
n o ny i	rder can be edilted by clicking on li 'nactive Users (denoted in gray) w	he Order Description, which is underlined or its corresponding copied flag (also underlined). If be replaced using either your user id or your "Default Order By User" setting.	ору
n o ny i	rder can be edited by clicking on ti inactive Users (denoted in gray) w anged By: Order Dat	the Order Description, which is underlined or its corresponding copied flag (also underlined). ill be replaced using either your user id or your "Default Order By User" setting. C	ору
n o ny i Arr	nder can be edited by clicking on ti inactive Users (denoted in gray) w ranged By: Order Dat Date: Current	he Order Description, which is underlined or its corresponding copied flag (also underlined). il be replaced using either your user id or your "Default Order By User" setting.	ору
n o ny i Arri	rder can be edited by clicking on ti inactive Users (denoted in gray) w anged By: Order Dat Date: Current Test, Patient Femal	he Order Description, which is underlined or its corresponding copied flag (also underlined). iil be replaced using either your user id or your "Default Order By User" setting. e e Next Appt: N/A Age: 46y 07/19/1975	opy
	rder can be edited by clicking on ti inactive Users (denoted in gray) w anged By: Order Dat Date: Current Test, Patient Femal Procedures	te Order Description, which is underlined or its corresponding copied flag (also underlined). ill be replaced using either your user id or your "Default Order By User" setting. e e Next Appt: N/A Age: 46y 07/19/1975 Septoplasty 12/03/2021 12:55PM (EDT) Ho	opy

- 🖻 Date: Older
  - Send Communication brings up New Message window to send a communication regarding the order
  - Create Reminder brings up Reminder window to create a reminder

💷 То	Myself				0
Subject					
Start	12/03/2021 😂 🚃	Status: Open			
Due	<b>\$</b>	Priority: Normal	Recurring: None		
Comment					
					$\sim$
				т	
				T	
					Ť
				ОК	Cancel

- Open Patient in EMR quickly open patient in EMR portal
- Open Patient in Billing quickly open patient in Billing portal
- eDocuments open patient's eDocuments
- Patient Orders gives list of current patient selected orders
- Comments opens Patient Comments window to quickly enter patient comment/alert
- Select Orders highlights all orders in group, allowing for right click options to be applied to all orders highlighted

Patient	t Orders				
Open (	Orders	134			
Unsolid	ited Labs	0			
		्र 🔚 + 👱 🎓 🚺			
Arrange	d By: Order Da	te			
🗆 Date	: Current				
🙎 Test,	, Patient Fema	ale Next Appt: N/A Age: 46y 07/19/1975			
	Procedures	Septoplasty	12/03/2021	12:55PM (EDT)	Howard,
	Procedures	Septoplasty	12/03/2021	11:04AM (EDT)	Howard,
🗆 Date	: Older				
👤 Test,	, Patient Fema	ale Next Appt: N/A Age: 46y 07/19/1975			
	Labs	тѕн	03/05/2020	12:24PM (EDT)	Rivers, K
	Radiology	Chest X-Ray PA and Lateral	03/05/2020	12:24PM (EDT)	Rivers, K
	Scheduling	Return to office in 6 weeks	03/05/2020	12:24PM (EDT)	Rivers, K
	Scheduling	Follow-up in 1 day	01/13/2020	10:14AM (EDT)	Kaiser, A
	Radiology	CT Head/Brain w/contrast	01/13/2020	10:14AM (EDT)	Kaiser, A
	Radiology	MRI Head/Brain w/contrast	01/13/2020	10:14AM (EDT)	Kaiser, A
	Labs	Basic Metabolic Panel	01/13/2020	10:14AM (EDT)	Kaiser, A
	Labs	Allergen, Food Comprehensive II	01/13/2020	10:14AM (ENT)	Kaiser, A
	Radiology	X-Ray Chest, PA and Lateral	01/13/2020	10:14AM (EDT)	Kaiser, A
	Procedures	Billateral Myringotomy with Tubes Surgery	01/13/2020	10:14AM (EDT)	Kaiser, A
	Referrals	Audiologist Referral	01/13/2020	10:14AM (EDT)	Kaiser, A
	Other	Auditory Brain Response (ABR)	01/13/2020	10:14AM (EDT)	Kaiser, A
	Other	Ultrasound of the Neck	01/13/2020	10:14AM (EDT)	Kaiser, A
	Other	Fine Needle Asperation of the Neck	01/13/2020	10:14AM (EDT)	Kaiser, A
	Other	CPAP Bi-Level	01/13/2020	10:14AM (EDT)	Kaiser, A
			, ,		

- Unselect Orders unselects highlighted orders
- Collapse All Groups collapses all groups, click + to open one group

🔒 🔸 Task Orders	
Open Orders	
✓ Open Orders Unsolicited Labs	134 0
	्र 🗄 - 🚊 🎓 🚺
Arranged By: Processor	
🗄 eLabs	
🗄 Howard, Carole	
🗄 Nurse	
Dffice Staff	

• Expand All Groups - re-expands groups if collapsed

### **Documenting Pharmacy/Preferred Pharmacy**

### **Documenting Pharmacy**

Follow these steps to search for the patient's desired pharmacy when creating electronic prescriptions:

1. Create a new prescription by either performing a drug search or by selecting a prescription favorite.

<b>R</b> Prescribe		Heinl 1234 Test Street B Phone: (317) 687-	<b>ein, Aston</b> Ilue Springs, MO 64015 8119 DEA: BM8803632			
Patient:	Cross, David L. 04/07/1956( 28 Park Meadows Nashville,	64y) Male TN 37215 Phone (	(615) 661-0213	Written:	03/04/2021	1
Drug:	atenolol 25 mg tablet					
Sig:	1 TAB ORAL every day					
Dispense:	30 Tablet					
Refills:	Two Effective	ə:	Void:	Dispense as Written	: No	
Note:						
Pharmacy:	Test 000 Pharຼຫຼacy 10.6MU	(703) 205-1295 00	00 Pending Response Way, /	Arlington, VA 22201		
Diagnosis:						
More+			✓ Benefit Check	Coverage Sav	ve Print Se	end

2. Click on the Pharmacy field.

3. The application will display the patient's Preferred Pharmacies, recently used pharmacies for the patient, pharmacies with the same zip code at the patient's home address, and office favorite pharmacies. Click on a pharmacy or press the **Search** button to find a different pharmacy.

Phar	rmacy					
				_		
_	Preferred	Address	City	State	Zip	Phone
Ť.	10Dot6 Pharmacy Store1	56789 Long Pharma	Reallylongcity	CA	90009	3102683115x1234
	Recently Used	Address	City	State	Zip	Phone
/ 🏪	Test 000 Pharmacy 10.6MU	000 Pending Respo	Arlington	VA	22201	(703) 205-1295
	Zip Code Search	Address	City	State	Zip	Phone
2	CARESPOT-NASHVILLE	2001 Glen Echo Rd	Nashville	ΤN	37215	(615) 292-0012
2	CVS/pharmacy #6437	3801 Hillsboro Pike	Nashville	ΤN	37215	(615) 385-0622
2	EyeRx	2204 Crestmoor Rd	Nashville	ΤN	37215	(833) 883-3391
1	Green Hills Pharmacy	2134 Bandywood Dr	Nashville	ΤN	37215	(615) 292-3359
1	Kroger Nashville 895	2131 Abbott Martin Rd	Nashville	ΤN	37215	(615) 297-4431
1	WALGREENS DRUG STO	3901 Hillsboro Pike	Nashville	ΤN	37215	(615) 298-5340
	Search List	Address	City	State	Zip	Phone

4. Type in the name, address and/or zip code of the pharmacy you're searching for (e.g. CVS 46060 or CVS lakeview or CVS Noblesville)

Pharmacy Selection and Maintenance	X
lakeview cvs	□     □     □     ↓     ↓     ↓     ↓     ↓     ↓     ↓     ↓     ↓     ↓     ↓     ↓     ↓     ↓     ↓     ↓     ↓     ↓     ↓     ↓     ↓     ↓     ↓     ↓     ↓     ↓     ↓     ↓     ↓     ↓     ↓     ↓     ↓     ↓     ↓     ↓     ↓     ↓     ↓     ↓     ↓     ↓     ↓     ↓     ↓     ↓     ↓     ↓     ↓     ↓     ↓     ↓     ↓     ↓     ↓     ↓     ↓     ↓     ↓     ↓     ↓     ↓     ↓     ↓     ↓     ↓     ↓     ↓     ↓     ↓     ↓     ↓     ↓     ↓     ↓     ↓     ↓     ↓     ↓     ↓     ↓     ↓     ↓     ↓     ↓     ↓     ↓     ↓     ↓     ↓     ↓     ↓     ↓     ↓     ↓     ↓     ↓     ↓     ↓     ↓     ↓     ↓     ↓     ↓     ↓     ↓     ↓     ↓     ↓     ↓     ↓     ↓     ↓     ↓     ↓     ↓     ↓     ↓     ↓     ↓     ↓     ↓     ↓     ↓     ↓     ↓     ↓     ↓     ↓     ↓     ↓     ↓     ↓ </th
Name         Address         City         State           CVS 17310 IN TARGET         4701 LAKEVIEW PK         ROWLETT         CVS(pharmacy #0638         74 SOUTH LAKEVIE         GIBBSBORO         CVS(pharmacy #0638         2019 LAKEVIEW VAE         DRACUT           CVS/pharmacy #10088         8626 Lakeview Rd         Rowlett         CVS/pharmacy #10088         8626 Lakeview Rd         Rowlett           CVS/pharmacy #4634         111 LAKEVIEW DR.         NOBLESVILLE         CVS/pharmacy #7431         3430 LAKEVIEW PK         ROWLETT	It     Pharmacy Demographics:       NCPDP ID     Type       Name     Activation       Activation     Activation       Store Number     Active       Service     Specialty       Levels     Levels
¢	Address: Cross Street Address 1 Address 2 City State State Zip Code
<	Contact: Email Phone Fax Usage:

5. Single select the **Pharmacy** you're searching for to view the pharmacy's details and map

6. Double-select the **Pharmacy** you're searching for to use it for the prescription.

🔒 🗸 EMR	Choice	Training 🗮
« Patient Charts 📄 🔹	🗋 New 💾 Save 🔣 History 🔹 🖃 Defaults 🛄 Patient 🔹 🚥 More 🔹	A Cross, David L. Born 07-Apr-1
Office Schedule	🗐 💇 🗐 🔗 👩 Refill History 🖄 Favorites 🔹 🤱 Options 🔹 院 RxHub History 🔗 PD	MP Patient BSA 2.25
Thursday Apr 22, 2021 Checked-In: 1	Drug Search Drug Edit My Favorite 🗹 My Therapeutic Classes	Other Favorites
Multiple Resources (4)	Drug and Dosage for Internal Medicine Favorites	↓ 1 ① 1 ● 4
Adams, Jo An ** 11:00AM - 11:30AM Heinlein, Aston Checked-In, Telehealth	Adderall XR 20 mg capsule extended release [Disp: 30:00 Capsule Sig: 1 0 Day Refil: NR ] Adderall XR 5 mg capsule extended release [Disp: 30:00 Capsule Sig: 1 0 Day Refil: NR ] amlodipine 10 mg tablet [Disp: 30:00 Tablet Sig: 1 0 Day Refil: 2 ] amlodipine 5 mg tablet [Disp: 30:00 Tablet Sig: 1 0 Day Refil: 2 ]	<u>~</u>
Allen, Bobby <b>XX O</b> 11:30AM - 11:45AM Heinlein, Aston Scheduled, Allergy Shot	amoxicilin 500 mg capsule [Disp: 21:00 Capsule Sig: 11D Refil: NR] AndroGel 20 25 mg/1.25 gram (1.62 %) transdermal gel pump [Disp: 3.00 Box Sig: 0 Day each a aspirin 81 mg chevable table [Disp: 100 Obable Sig: 1 0 Day Refil: PRN ] atenoiol 25 mg tablet [Disp: 30.00 Tablet Sig: 1 0 Day Refil: 2 ]	xilla Refiil: 3 Alert]
Grant, Anna (1 ** Q 11:45AM - 12:00PM Heinlein, Aston Scheduled, Botox Inject	azithromyon 250 mg tablet [Disp: 6:00 Tablet Sig: 2 Initially then 1 OD x 4 d Refit: 1] Bactrim DS 800 mg-160 mg tablet [Disp: 14.00 Tablet Sig: 1 BID Refit: 0] benazerul 20 mg tablet [Disp: 30.00 Tablet Sig: 1 O Day Refit: 2] buspitrone 10 mg tablet [Disp: 60.00 Tablet Sig: 1 BID Refit: 2] buspitrone 30 mg tablet [Disp: 60.00 Tablet Sig: 1 BID Refit: 2]	
MISYS, TEST XX O 12:45PM - 1:00PM Heinlein. Aston Hospital Rounds	Bystolic 10 mg tablet [Disp: 30.00 Tablet Sig: 1 O Day Refill: 5 ] Bystolic 20 mg tablet [Disp: 90.00 Tablet Sig: 1 O Day Refill: 3 ]	ugh Rofili: NR ]
6 🖉 🗅 🖶 🗘		
Arranged By: Location	B Heinlein, Aston	
	Prescribe Phone: (317) 687-8119 DEA: BM8803632	
	Patient:         Cross, David L. 04/07/1956(65y) Mail         Patient:         Cross, David L. 04/07/1956(65y) Mail           29 Both Mondourn Machaille TN 2235         Phone (615) 861 0212	Written: 04/22/2021
	Drug atendal 25 mg tablet	
	Sig: 1 TAB ORAL every day	
Dialweis Rounde	Dispense: 30 Tablet	
🛱 🚺 0/0	Refills: Two Effective: Void: Dispense at	Written: No
	Note:	
	Pharmacy: CVS/pharmacy #4634 (317) 776-3601 [111 LAKEVIEW DR., NOBLESVILLE, IN 46060	
	Diagnosis: CVS/pharmacy #4634	
	More+ Phone: (317) 776-3601 Address: 111 LAKEVIEW DR., NOBLESVILL	E,IN 46060 rint Send

Note: To search for a pharmacy out of your state, de-select the **State** checkbox next to the Pharmacy Search field.

Name Address City State	Pha

To search for a Mail Order pharmacy, de-select the **State** checkbox select the **Mail** checkbox.

Pharmacy Sele	ction and Maintenance			
	Q 2 State: MO	Local 💽	Mail	
Name	Address	City	Include Ma	il Or

### **Patient Preferred Pharmacy**

Patients have the ability to select their Preferred Pharmacy on the My Medical Locker- based on practice setup.

To view the patient's preferred pharmacy outside of the Medications Chart Tab, open the Patient Index and use the ...More menu list and select Preferred Pharmacy

Patient Setup	🗋 💾 🎓	
	New Save Train	Advanced Search
6 6	Chart 9330 123 Test Lane Winter Garden, FL 3478	Accident/Related Cause Appointments
<u> </u>	noemail@email.com	Authorizations
	James T3st	Care Team
	Home (322) 323-2323	Demographic Bridge
	Self Pay	Document Management
	Copay \$50.00	Eligibility
Summary	Willow T3st	History
,	123 Test Lane	Lab Result Entry
Demographics	Winter Garden, FL 3478	Preferred Pharmacy
Insurance	Past 3 Visits	Intake Assignment
Responsible Party	12/16/2021 2:00PM (30r	MyMedicalLocker Ad
Emergency Contact	12/15/2021 10:30AM (30	Office Communications
	12/13/2021 8:00AM (30r	Patient Communicatio
Comments	Palanaa, ¢0.00	Print / Fax Queue
Caeo Managomont	Dalatice: \$0.00	

You can view the patient's preferred pharmacy. In addition, you can add a new or additional preferred pharmacy by searching for pharmacy and clicking on **Add** 

	Preferred Lis	st				
Pharmacy	Address	City	State	Zip	Phone	
Provent Pharmacy #1820	13697 W Colonial Dr	Winter Garden	FL	34787	(407) 656-8680	
						$\sim$
42						
						•
Search				٦	F Add   👗 Rem	love
	Search List					
Pharmacy	Address	City	State	Zip	Phone	
Recently Used						
Provident States #1820 Provident Representation Provident Representation Representation Provided Representation Representatio Representiatio Representiatio Representation	13697 W Colonial Dr	Winter Garden	FL	34787	(407) 656-8680	^
Zip Code Search						
Part Realth-Total Heal	3131 Daniels Rd	Winter Garden	FL	34787	(407) 395-2865	
🍢 CHC Pharmacy-Winter Garden	13275 West Colonial Drive	Winter Garden	FL	34787	(407) 614-5374	
Province 12338 IN TARGET	3343 Daniels Rd	Winter Garden	FL	34787	(407) 395-0112	
P CVS 17810 IN TARGET	204 Ruby Red Place	Winter Garden	FL	34787	(407) 550-9007	
ECKERD DRUGS #3203	4110 Winter Garden Vinel	Winter Garden	FL	34787	(407) 877-3131	
P FH CENTRA CARE -WINTER G	. 3005 Daniels Road	Winter Garden	FL	34787	(407) 654-8186	

## Superbill - Create from EMR

# Superbill

The Superbill Chart Tab allows providers to create claims at the time of service to eliminate lost charge tickets and to promote faster payment. Follow these steps to complete a Superbill from the EMR.

• Open patient from EMR, click on Superbill Chart Tab.



• Select the Superbill and Service Location from the drop down menu

Superbill	* ENT Office Superbill ICD10	Claim #	
Service Location	* iSalus Healthcare East	Claim Status	;
	Carelink Home Health	Diagnosis	
	ChoiceMD Telehealth	Problem List	
1	Community East しう Est Community South	Top Provider Diagnosis Codes	•
	Davita Indy North Dialysis	Most Common Diagnosis Codes	
	DCD Family First Physicians	Lookup	•
	Fishers Franklin		

- A default Superbill and Location can be assigned to a Resource to load as default
- Edit Service Location, Rendering Provider, Service Provider, Alternate Provider and/or Supervising Provider, click on the Claim Status dropdown. You can also enter an Admission date and/or Claim Narrative

🗋 New 💾 Sav	e 🚺 History 🔻 📑 Defaults 🗮 Patie	ent 👻 👓 More	•
Superbill *	Audiology Diagnostic Superbill	Claim #	
Service Location *	~	Claim Status	Â.
Rendering Provider*	Q	Admission	Accident/Related Cause
Referring Provider	Q	Claim	
Alternate Provider	Q	Narrauve	
Supervising Provider	Q		~
Alternate Provider Supervising Provider	् ् ्	Narrative	$\sim$

- Add Procedure codes
  - From **blue bars** open the appropriate blue bar, select the Procedure code(s). Click on appropriate code(s) for the visit.

Procedures						
	Audiology					
	EAR					
	•					
1	✓ Office Visits					
	New New	Est Est				
Office Visit	99204 ✔	99214				
Office Visit	^m zee	99213				
Office Visit	99202	99212				
Office Vieit	00201	00211				

• From Lookup- search for code via Lookup- enter code in search and select

🗋 New 💾 Save 🕄 History 🔻 🖃 De	efaults	Patient 🔹	••• More 🔻				
Superbill * Otolaryngology Superbill I	🦉 Searc	h - Internet	Explorer		_		×
Service Location * General Hospital	Court	eezeol	τ	<b>v</b> ()			
Procedures	Search	00/02	<u> </u>	× ~			
Audiology						×	
EAR		Provider F	avorites				
Nose		58750	66762			CPT	
✓ Office Visits		66762	7417626			CPT	
Throat							
Lookup							
Procedure Code Search							
		4 results			All	New	

- Add Diagnosis codes
  - From Problem List

🗋 New 💾 S	ave 🔞 History 🔹 📑 Default	s 🔝 Patie	nt 🔻 °°° Mo	re 🔻			
Superbill	<ul> <li>Valley Superbill</li> </ul>	~	Claim #				
Service Location	<ul> <li>Community East</li> </ul>	~	Claim Status			×	
	Procedures			Diagnosi	s		
	Consultation/Pre-op Clearance		1	Problem	List	Δ	
	Immunizations	•	Acute sinusiti	s, unspecified	J01	J0190 🗸	
	Injections	•	Essential (pri	mary) hypertension	lin 110	×	
	Laboratory			Top Provider Diag	gnos Codes	•	
1	Office Visits	Δ		Diagno	ses	•	
Office Visit	New	Est		Looku	ıp	•	
Level 1	99201	99211					
Level 2	99202	99212					
Level 3	99203	99213					
Level 4	99204 🖌	99214					
Level 5	99205	99215					
	Other Services	•					
	Preventative						
	Procedures						
	Lookup						

• From **Top Provider Diagnosis Codes** (populates automatically based on usage)

-		
✓ Problem List		•
✓ Top Provider Diagnosis	Codes	Δ
Abscess of breast associated with the puerperium	O9112	
Acne conglobata	L701	
Acne vulgaris	L700	
Acute bronchitis, unspecified	J209	
Acute recurrent sinusitis, unspecified	J0191	<b>V</b>
Acute sinusitis, unspecified	J0190	
Adenoviral pneumonia	J120	
Adjustment disorder with anxiety	F4322	
Adjustment disorder with mixed anxiety a depressed mood	nd F4323	

• **Custom blue bars** (based on practice preference- you may have custom list of diagnosis codes to select for superbill)

Diagnosis

Diugiioaia					
Problem List		•			
Top Provider Diagnosis Codes					
Lumbar/Sacral	Ռո	Δ			
Ankylosing spondylitis of unspecified sites in spi	м459				
Congenital spondylolisthesis	Q762				
Intervertebral disc disorders with myelopathy, lum	M5106				

• Lookup: Brings up a Diagnosis Code Search window - search by code or words

Diagnosis						
✓ Problem List	۲					
Top Provider Diagnosis Codes	•	^				
✓ Diagnosis	•	Search	- Internet Explorer	_ п		×
Diagnosis Codes	•	Sector C	internet explorer			~
✓ Lookup	Δ	Search	lumbar 🛛 🗙 🔍			
Diagnosis Code Search N170 Acute kidney failure with tubular necrosis	~		ICD10 Provider Favorites		×	
			ICD10 Search Results		~	
			M41126 Adolescent idiopathic scoliosis. lumbar region	ICD10	<u> </u>	
	_		M41125 Adolescent idiopathic scoliosis, thoracolumbar region	ICD10		
			M4216 Adult osteochondrosis of spine, lumbar region	ICD10		
			M4215 Adult osteochondrosis of spine, thoracolumbar region	ICD10		
			M4816 Ankylosing hyperostosis [Forestier], lumbar region	ICD10		
			M4815 Ankylosing hyperostosis [Forestier], thoracolumbar region	ICD10		
	_		M456 Ankylosing spondylitis lumbar region	ICD10		
			M455 Ankylosing spondylitis of thoracolumbar region	ICD10	V	
			M47016 Anterior spinal artery compression syndromes, lumbar region	ICD10		
			25 of 308 results ICE	10 I	lew	
Charge Summary						
Edit Charges			3			
<u></u>						
DOS Code Unit	ts	Charge	Amount 역 호 역			
O2/10/2022 99204		\$337.	00 \$337.00 🗹 🗹 🔚			

A **blue** diagnosis code is one on the patient's problem list. A **black** diagnosis code is not on the patient's problem list. Clicking a **black** diagnosis code will turn it **red** and push the diagnosis code to the patient's problem list when the superbill is saved.

• Add modifiers, click the icon that looks like a piece of paper with a red X:



• Type in the appropriate modifier or select one of the used modifiers and click the green arrow to push it over to the appropriate spot. Click OK.

Charge Sur	99213 Used	
Edit Charges	Modifier #1	
DOS         Code           Copy         Delete         03/17/2020         99213	Modifier #2	int \$
	OK <u>C</u> ancel	25.00

• After a modifier has been added, the piece of paper icon will show with a green plus sign to signify that there is a modifier being used.



• Add Units- click on the Units box to edit units for the CPT code (daults to 1 unit)

	Charge S	Summary		
Edit Charges				3
POE	Code	Unite	Charge	Amount
DOS	Code	Units	Charge	Amount
D2/10/2022	J3301	🙀 🛓	\$4.00	\$4.00
		3		

• Associate the procedure codes to the appropriate diagnosis codes

	Charge Summa	ary			 	_
Edit Charges			*	45 79 31XA		1
DOS	Code	Units Charge	Amount	¥ ¥ 8		
D2/10/202	2 J3301	1 \$115.0	0 \$115.00			~
D2/10/202	2 15832	1 \$1,903.1	4 \$1,903.14			, ,
D2/10/202	2 99213	1 \$150.0	0 \$150.00			~
		Tota	= \$2,168,14			

• When all codes are entered, click Save

Ι	🗋 New 📙 Save	e 🕔 History 🔹	🕘 Defaults 🛛 其 Patie	ent 🔻 °°° Mor	e 🔻	
	Superbill *	Choice Super	~	Claim #		
	Service Location *	ENT Toledo West	~	Claim Status		¥
1		Procedures			Diagnosis	
	1	consult	Δ	1	Problem List	Δ
	Eval level 4		99214	Low back pair	1 IV	1545 ✔
	Eval leve 3		99213 ✔	Osteoarthritis	of knee (disorder) N	1179 🖌
	Venipuncture		36415		Top Provider Diagnosis Codes	

• After Superbill is saved, the Claim Status = Closed Electronic Superbill

🗋 New 🖹 Save 🖏 History 🔻 🖨 Defaults 🛤 Patient 🔹 👓 More 🔹							
Superbill *	Choice Super	*	Claim #	26859			
Service Location	ENT Toledo West	~	Claim Status	Closed - Electronic Superbill			
	Procedures			Diagnosis			
1	consult	•	✓	Problem List			
	Lookup	•		Top Provider Diagnosis Codes			
				New Section 2			
				Lookup			

• To make edits to a Closed Electronic Superbill, select Allow updates to 'Closed-Electronic Superbill'- make necessary updates and click **Save** 

_
-

**SOAP Notes** 

The SOAP Note chart tab is a dynamic chart tab in which data pulls for various chart tabs to create a formal visit note. Users may have various SOAP Note letters to choose from when creating a SOAP Note.

#### Navigating to the SOAP Note Chart Tab

1. Begin by documenting all aspects of the visit. (For example, History, Vitals, Allergies, ROS, HPI, Exams, Problem List, Medications, Orders, Treatment Plan, Superbill, etc)

Chart Tabs	*
Summary	
History	
Vitals	
ROS	Image: A start and a start
Allergies	A 1
HPI	Image: A start and a start
Exams	A 1
Problem List	Image: A start and a start
Order Entry	Image: A start and a start
Medications	V 🗸 🗌
Treatment Plans	v
Superbill	🧳 🗤
Progress Notes 0	<b>v v</b>
Letters Im	

2. Navigate to the SOAP Notes chart tab, the system will generate a SOAP Note based on the user's default SOAP Note letter.



3. Users may choose to change the SOAP Note letter by selecting a new template from the first dropdown.



In most cases, the SOAP Note type will generate on it's own based on the SOAP Note letter template settings.



4. Once the user has reviewed the note and is ready to sign-off, navigate to the PIN box and enter their unique 4-digit pin. Click **Save**.



5. For scheduled visits, a signed SOAP Note will be indicated using a green check mark on the appointment.



**NOTE:** Practices may use various terminology when labeling the final office note. (I.E. Progress Note, Visit Note, SOAP Note, etc)

## **Billing Overview**



# **Billing Overview**

The Billing Dashboard is the landing page of the Billing portal. The Billing Dashboard consist of 3 main areas. Today's Activity, Revenue Cycle Wheel, and Key Performance Indicators. Below we will talk about each of these areas and how its info is to be utilized.

• Today's Activity: This area will show you the numbers for today's date of service allowing you to get a glimpse of what is to be expected for your day's totals. This area is automatically updated to the current date of service.

- **Revenue Cycle Wheel:** This area acts as a glance on the claims cycle and also doubles as individual users queues when you click the word Revenue Cycle based on setup. Each tile within the Revenue Cycle wheel will allow you to dive in to view what the numbers consist of but also allowing you to bring up the applicable data by hovering over it and clicking the magnifying glass. The Revenue Cycle wheel is essentially where you will initiate your day by clicking on the applicable tile you will be working on a diving into the perspective data you need, whether reviewing and submitting claims, working rejected and denied claims, posting payments, or working on your practice's aging. The Revenue Cycle wheel consists of 5 tiles.
  - Prepare: This tile will show you Missing claims (patients that are checked in/out but no superbill has been documented), Missing Data claims (claims that are missing crucial data to be processed), Ready for Processing Claims (claims that are ready to be reviewed to be submitted) and Claim Issues (claims that have NDC Errors or that fall into a Global Period Days).
  - Submit: This tile will consist of claim batches that are either pending to be submitted (Pending Submission), claim batches that are pending to be acknowledged (Response Submission), or claim batches to which all claims have rejected (Error Submissions).
  - Manage: This tile will consist of your Rejected and Denied claims, claims that are put into a Biller Defined status, and claims with No response with 7 days (default is 7 days but can be changed per user).
  - Post: This tile will consist of your payments pending to be posted. This includes ERA deposits, EOB Deposits, Statement Deposits, and Receipts. They will be listed as Deposit Errors, New Deposits, Receipts, and Posting Errors (some may not show if you do not have any). The Deposit Errors will consist of ERA Deposits with a PLA (Provider Level Adjustment) Adjustment which will need to be looked at to resolve it. The New Deposits will consist of any ERA Deposits, EOB Deposits, and Statement Deposits that have not been posted yet. The Receipts will consist of Error Receipts (receipts that the system has not been able to auto post which require a user to post them). The Posting Errors will consist of claims that have been sent to posting but they have a claim level error which will need to be looked at to resolve it.
  - Collect: This tile will consist of your practice's aging. This will include both insurance and patient aging. By expanding the each aging you will be able to view the aging broken down by aging bucket (0-30 days, 31-60 days, 61-90 days....)
- Key Performance Indicators (KPI): This area will show you a line graph for a 90 days period dependent on the options you have selected (checkboxes on the left). The options to select to view the data will be a user setting and users will be able to look at the data that is the most pertinent to them. By clicking the jumpbox next to the KPI header you can view additional options to select from and also alter the time frame to view the line graph for.

# Billing: Entering a New Patient from Billing Portal Entering a New Patient from Billing Portal

The below will guide will walk you through how to create a patient from the Billing Query window in the instance you are manually entering a claim and the patient is not yet in the database.

1. In the Billing portal select the Billing Query



2. On the Billing Query toolbar select the New Options drop down and click Claim.<\li>

🔒 🚽 Billing		
🚫 🚺 🔚 -	🕸 Setup Screens	🔹 📑 Reporti
P 🖉 🚰 -	📑 🔹 🖬 🕇	्रि र 📩 र
	E Claim	ia
Patient	Patient	

3. Enter patient's last name, first name, or date of birth in the textbox to search for the patient. You should always search for the patient first before adding a new patient even if you are almost positive the patient is not in your database.

×@1	Patient Sea	rch Webpage Dialog	
test	4	x 🔍 🗸 🔁 🗋	) 💕 🎘 - 🎯 -
<b>=</b> s	Search Res	ults (0 total rows)	
	Chart	▲ Name	Employer
No d	ata found		

4. Once confirmed the patient does not exist in the database click the New (white sheet of paper) icon.



5. In the Patient Setup window complete the patient's info (fields with a red asterisk are required. The fields that are required for billing are; First Name, Last Name, Address 1, City, State, Zip, DOB, Signature checkbox, Signature Date, Gender, Home phone number, and Responsible Party checkbox "if same as patient"). Click Save and proceed to the insurance tab.

🧧 Patient Setup Webpag	ge Dialog								—	o x
Patient Setup	New Save	Train More	3					New	Patient Setup	Р¢
	Name			Address				Chart		
	First *			Address 1				Chart #		
	Middle			Address 2				User Defined		
	Last •			City	•			DOB		
	Nick			State	• •	Country	~	RHC		
	Suffix			Zip				Signature		
	Demographics			Contact				Status		
Summary	Gender *		✔ 🕅	📝 Home	*	Ext		Marital		~
Demographics	Ethnicity *		~	🕅 Work		Ext		Employed		~
Insurance	Race *		~	Mother		Ext		Employer		
Responsible Party	Lang.		~	Email				Student		~
Emergency Contact	Location	Primary Location	Q	Reminder			~			
-	✓ Active	✓ Reportable	Do NOT print St	atements						
Comments	Provider									
Case Management	PCP	Primary Care Phys	ician	۹ (۵	)					
Dialysis	Referring	Referring		0	)					
Employer	Doctor	Doctor		٩ (	)			N		
Sliding Fee	Rx Hist.			~				63		

6. In the Insurance tab complete the Guarantor section (if patient is the policy holder select Same as Patient to populate the patient demographics. If the policy holder is a spouse or parent select Individual, click Populate Patient information to bring over the address and complete the remainder of the section). Complete the Insurance Policy section by entering a Start Date, Payer, Insured ID, Copay (if applicable), and Group Name and Policy # (if applicable). Click Save. If patient has a secondary insurance click New at the top and repeat these steps to document the secondary insurance. If secondary insurance is not applicable proceed to any additional tabs as applicable (Responsible Party tab if the Responsible Party Same as Patient was not checked in the Demographics tab).

🤗 Patient Setup - Internet	Explorer				- □ >
Patient Setup	New Save Train More	Pat	ient, Test Born 01	- <b>Jan-1989(33y)</b> G	ender Female
🔹 iSalus	Cov. Active Payer 1 Y Anthem Blue Cross 2 Y AETNA		Primary ID 123456 21135847561	Group/Policy #	Copay \$0.00 \$0.00
Summary Demographics Insurance	Guarantor Coverage 1 First Test Middle	Insured  Same as Patient Address 1 Address 2	ent () Individual ()	Company Pop Phone (788 Signature V	i) 477-1626 Ext
Responsible Party Emergency Contact	Last Patient Suffix Gender Female	City Groveport State OH  Fmail Kraig@test.com	Country USA 🗸	Zip Code 43125	
Comments Case Management	Relationship Self  DOB 01/01/1989	Employer Property Casualty			
Dialysis Employer Sliding Fee Immun. Registry Extension Miscellaneous Referral Tracking	Insurance Policy       Start     07/14/2015     End       Payer     Anthem Blue Cross       Type     * Commercial       MSP Reason     Copay       Copay     • S     0.00     %       Deductible Amount     Met       Max out of Pocket     Met	Benefit Rese Insured ID Secondary II Group Name Group/Policy	t	123456 Plan Code	e Etribility
		n 27 o ongitality	Docume		

# Billing: Entering a New Claim from Billing Portal

# **Entering a New Claim from Billing Portal**

The below will guide will walk you through how to create a claim from the Billing Query window in the instance you are manually entering a claim.

1. In the Billing portal select the Billing Query window.



2. On the Billing Query toolbar select the New Options drop down and click Claim.

🔒 🚽 Billing		
🔕 🕼 🔚 -	🕸 Setup Screens	🔹 📑 Reporti
P 🖉 🚰 -	📑 🔹 🖬 🕇	🔊 • 📩 •
	Claim 🕅	ia
Patient	Patient	

3. Enter patient's last name, first name, or date of birth in the textbox to search for the patient.

lest	ра	्र 🕹 🗌	) 💕 🔆 - 🎯 -			🗌 Ir	clude Inactive	e Patients	Max Rows 50
	Search Re	sults (6 total rows)							Row 1 c
	Chart	Name	Employer	Primary Type	Primary ID	DOB	Age	Gender	Home Ph
1	9796	Patient, Test		SSN		01/01/1989	32y	Female	(785) 477-1626
2	9492	Test, Paper 😼		SSN		08/24/1982	39y	Male	(317) 687-8119
3	9765	Test, Paper		SSN	222-55-8888	01/19/1972	49y	Female	(317) 687-8128
4	9792	Test, Patient				05/05/1989	32y	Male	(317) 540-6987
5	24832	test, patient		SSN	111-11-1111	07/19/1975	46y	Male	(317) 490-9629
6	24976	Test, Patient				07/19/1975	46y	Unknown	(317) 555-5555

- 4. Double click on the patient's name to open a new claim window.
- 5. In the new claim window complete the necessary claim info.

New Claim for Te	st Patient 01/01/19	89 (32y)																Х
Dpen 🝷 🔚	Save 🔹 🚱 Histo	ory - 🛔	Payme	ents 🔹 [	🔙 Patient 🔹										Search	for Patient	Q v	ŵ
▲ Status					Patient							Se	rvice (2)					
Claim	New -				Patien	nt 97	796 - Test Patient 👻						Location	Service Loca	tion		Q	
Status	Ready to Send Pri	mary, Ele	ctronic	~		(7	785) 477-1626		1 42425				Rendering	Rendering Pi	rovider		Q	
Substatus				~	Pat. L	ocation	Patient Location		1 43123	Q			Referring	Provider, Aut	omated F	ax	Q	
Level	Primary 🗸	Billing	Electron	ic 🗸	Pat. P	Provider	Patient Provider			Q					Referred			
Type	Medical	-		~	Resp.	Party F	Patient, Test			Q			☆ Other Pro	viders				
Owner	Farias, Michell			Q	Prima	ary (	1) Anthem Blue Cros	SS		Q			Alternate	Alternate Pro	vider		Q	
837	Professional ()	Institutio	nal		Secor	ndary (	2) AETNA			Q			Supervising	Supervising I	Provider			
	00				Tertia	IIV 7	Tertiarv Insurance			Q			Ordering	Orderina Pro	vider			
						verride Inc	eurance.	96	8 Authori	zation	1		Attending	Attending Pro	ovider			
						venue ma	surance	-	P Aution	280011			Purchasing	Purchasina P	Provider		0	
Desertes		(4)											rarenaoning	, aronaanig ,				
▲ Proceaures	and Diagnoses	(1)				Deserviture	Amount			e diffe e				Disc				1
# From	I To	Proce	dure	POS	Units	Charge	Amount	-	1 2		5	4	1	2	3		4	
1 09/10/20	21 🤤 09/10/2021	$\diamond$	E	~		\$0	.00											
Add New I	tem									Tota	al: SI	0 00	Pav/Adi: S	0 00 Balanc	e: \$0 00	Receipt	ts: \$0 00	,
													,,					
<ul> <li>Additional I</li> </ul>	nformation				Message	es and M	lonitoring					Qu	ieue and T	asking				
Admission	\$	Но	ur	~	Aging		N/A						There is cu	rrently nothing	in the Qu	ieue for this	s claim	
Discharge		Но	ur	~	Billing M	lessage	N/A											
luiti-l					Claim Va	alidation	N/A											
iniuai		1			Patient V	Validation	×											
Onset	÷	]			Patient C	Only	N/A											
					Code Lir	mitations	N/A											
					Required	d Fields	N/A											
	Ν				Global P	Period	N/A											
	63				837 Vali	idation	N/A											
					Monitorir	ng	N/A											
+ Add Inform	nation				Alerts	(	Comments	d	Activit	y Log	]							

### **Billing: Claim Submission Manual**

Workflow: Claim Submission Manual

Step 1: Click on Billing



Step 2: Go to the prepare area of the Revenue Wheel.



• Ready for Processing - Claims that are currently ready to be sent out





on the Magnifying glass to go into the Closed Electronic Superbill billing query queue.



Step 4: This step assumes all coding has been completed Refer to Coding best practices for this portion. Click and choose the claims you wish to submit manually. You may check and uncheck the whole queue by clicking the plus sign on the second column down or you can check the claims one by one for processing.

٩	2	2	- 🗟 - 🚨		• 🔊 • 🚉 • 🎇 • Max	c. Rows 9999				
	#	+	Claim	DOS	Submission	Status	Billing	Charges	Balance	
	1		32234	08/02/21		Closed - Electronic Superbill	E	\$0.00	\$0.00	Γ
	2		32236	08/02/21		Closed - Electronic Superbill	E	\$0.00	\$0.00	
	3		32235	08/02/21		Closed - Electronic Superbill	E	\$0.00	\$0.00	
	4		32227	08/02/21		Closed - Electronic Superbill	E	\$0.00	\$0.00	
	5	✓	32276	10/14/21		Closed - Electronic Superbill	Р	\$85.00	\$85.00	
	6		32105	01/19/21		Closed - Electronic Superbill	Р	(\$1.00)	(\$1.00)	
	7		32237	08/02/21		Closed - Electronic Superbill	E	\$0.00	\$0.00	
	8	•	32226	08/12/21		Closed - Electronic Superbill	E	\$175.00	\$175.00	
ria	9	•	32154	04/06/21		Closed - Electronic Superbill	E	\$125.00	\$125.00	Γ
te	10	•	32215	07/01/21		Closed - Electronic Superbill	Р	\$125.00	\$105.00	
5	11	-	32170	04/06/21		Closed - Electronic Superbill	Р	\$85.00	\$85.00	Г
ž	12	-	32169	05/05/21		Closed - Electronic Superbill	Р	\$85.00	\$85.00	
2	13	✓	32225	07/21/21		Closed - Electronic Superbill	E	\$140.00	\$140.00	Г
ea	14	-	32220	07/08/21		Closed - Electronic Superbill	E	\$125.00	\$125.00	
Ő	15	✓	32166	04/22/21		Closed - Electronic Superbill	E	\$125.00	\$125.00	Γ
	16		32228	08/02/21		Closed - Electronic Superbill	E	\$0.00	\$0.00	
	17	✓	32134	02/25/21	03/03/2021 1:29PM (EDT)	Closed - Electronic Superbill 03/03/2021: Unknown 03/03/2021: BillingMD Valdiation error	E	\$65.00	\$65.00	
	18	-	32112	01/20/21		Closed - Electronic Superbill	E	\$120.00	\$120.00	
	19		32229	08/02/21		Closed - Electronic Superbill	F	\$0.00	\$0.00	
			1	1	1					1

Step 5. Once all claims are chosen then it is time to submit the batch. Navigate to the second tool bar and choose the submission options tool (green arrow pointing to the right) click the down arrow next to this tool and click submit claims.



Step 6 : the prepare back opens up click ok

<ul> <li>337 Professional</li> <li>2 Primary Claims</li> <li>Secondary Claims</li> <li>Tertiary Claims</li> </ul>	837 Institutional Primary Claims Secondary Claims Tertiary Claims	Paper Primary Claims Science Secondary Claims Tertiary Claims
Prepare Batch for State	ement (Responsible Part	()
Statements can no long	er be prepared from this	window, please use
oratement Datches III 0	raer to periorni triis funct	ionaiity.
Prepare Batch for File B	Extract: 2 Claim(s)	
No extract formats are	available	
Claim Information		
Claim Information	elected.	
Claim Information otal of 2 claims were se	elected.	

Click ok again:

	теораје или у
Claim	Submission Message(s):
•	Primary Paper Claims: O Submission number 3630095, consisting of 6 Paper Claims has been submitted. Primary Electronic Claims (Professional): O WARNING - EDI File Created, but no clearinghouse detected Submission number 3630096, consisting of 40 Electronic Claims (5010) has been submitted.
These	submissions may be viewed on the claim Submission window
Print	<u> 9k</u>
	N

Step 7:

Navigate to Claim Submission:



#### Step 8: find the batch you created:

	-		· · ·							
18	1	3619573	10/13/2021 5:18PM (EDT)	Claims	Electronic	lellen	1	0	1	
19	1	3630095	10/25/2021 12:20PM (EDT)	Claims	Paper	lamanda	6	4	2	$\mathbf{\mathbf{v}}$
						lm				
						4)				

#### Step 9 : Click process:

Claim       Passed       Payer       Rendering Provider       Patient       Total       Balance       Rendering         1       32173       (1) COMMONWEALTH O       Dietzen, Chuck MD       Head, Blake       \$50.00       \$50.00       1         2       32224       (1) COMMONWEALTH O       Dietzen, Chuck MD       Head, Blake       \$65.00       \$50.00       1         3       32215       (1) First Health (NALC)       Kildare, Richard MD       Dee, Gail       \$125.00       \$105.00       1         4       32112       (1) Morns insurance comp       Cohen, Sandra M.D.       Gumdrop, Billy       \$120.00       \$120.00       1         5       32169       (1) First Health (NALC)       Kildare, Richard MD       Dee, Gail       \$85.00       \$85.00       1         6       32170       (1) First Health (NALC)       Kildare, Richard MD       Dee, Gail       \$85.00       \$85.00       1         6       32170       (1) First Health (NALC)       Kildare, Richard MD       Dee, Gail       \$85.00       \$\$510.00         7       10       S530.00       \$\$510.00       \$\$510.00       \$\$510.00       \$\$510.00       \$\$510.00		ubmissi	on Details						Row 1 of
1       32173       (1) COMMONWEALTH O       Dietzen, Chuck MD       Head, Blake       \$50.00       \$50.00         2       32224       (1) COMMONWEALTH O       Dietzen, Chuck MD       Head, Blake       \$65.00       \$65.00       \$         3       32215       (1) First Health (NALC)       Kildare, Richard MD       Dee, Gail       \$125.00       \$105.00       \$         4       32112       (1) Moms insurance comp       Cohen, Sandra M.D.       Gumdrop, Billy       \$120.00       \$       \$         5       32169       (1) First Health (NALC)       Kildare, Richard MD       Doe, Gail       \$\$85.00       \$       \$         6       32170       (1) First Health (NALC)       Kildare, Richard MD       Doe, Gail       \$\$\$30.00       \$\$\$50.00       \$         6       32170       (1) First Health (NALC)       Kildare, Richard MD       Doe, Gail       \$\$\$50.00       \$\$\$         6       32170       (1) First Health (NALC)       Kildare, Richard MD       Doe, Gail       \$\$\$30.00       \$\$\$         7       (1) First Health (NALC)       Kildare, Richard MD       Doe, Gail       \$\$\$30.00       \$\$\$         8       (1) First Health (NALC)       Kildare, Richard MD       Doe, Gail       \$\$\$30.00       \$\$\$\$		Claim	A Passed	<ul> <li>Payer</li> </ul>	Rendering Provider	<ul> <li>Patient</li> </ul>	Total	Balance	<ul> <li>Remove</li> </ul>
2       32224       (1) COMMONWEALTH O Dietzen, Chuck MD       Head, Blake       \$65.00       \$65.00       \$         3       32215       (1) First Health (NALC)       Kildare, Richard MD       Doe, Gail       \$\$25.00       \$\$105.00       \$         4       32112       (1) Moms insurance comp Cohen, Sandra MD.       Gumdrop, Billy       \$\$120.00       \$\$26.00       \$         5       32169       (1) First Health (NALC)       Kildare, Richard MD       Doe, Gail       \$\$85.00       \$\$         6       32170       (1) First Health (NALC)       Kildare, Richard MD       Doe, Gail       \$\$\$       \$\$\$       \$\$         7       (1) First Health (NALC)       Kildare, Richard MD       Doe, Gail       \$\$       \$\$       \$\$         8       32170       (1) First Health (NALC)       Kildare, Richard MD       Doe, Gail       \$\$       \$\$       \$\$       \$\$       \$\$       \$\$       \$\$       \$\$       \$\$       \$\$       \$\$       \$\$       \$\$       \$\$       \$\$       \$\$       \$\$       \$\$       \$\$       \$\$       \$\$       \$\$       \$\$       \$\$       \$\$       \$\$       \$\$       \$\$       \$\$       \$\$       \$\$       \$\$       \$\$       \$\$       \$\$       \$\$       \$	1	32173		(1) COMMONWEALTH O	Dietzen, Chuck MD	Head, Blake	\$50.00	\$50.00	
3       32215       (1) First Health (NALC)       Kildare, Richard MD       Doe, Gail       \$125.00       \$105.00       [         4       32112       (1) Moms insurance comp       Cohen, Sandra M.D.       Gumdrop, Billy       \$120.00       \$120.00       [         5       32169       (1) First Health (NALC)       Kildare, Richard MD       Doe, Gail       \$85.00       \$85.00       [         6       32170       (1) First Health (NALC)       Kildare, Richard MD       Doe, Gail       \$85.00       \$85.00       [         7       (1) First Health (NALC)       Kildare, Richard MD       Doe, Gail       \$85.00       \$85.00       [         8       (1) First Health (NALC)       Kildare, Richard MD       Doe, Gail       \$85.00       \$85.00       [         9       (1) First Health (NALC)       Kildare, Richard MD       Doe, Gail       \$85.00       \$85.00       [         9       (1) First Health (NALC)       Kildare, Richard MD       Doe, Gail       \$85.00       \$510.00       [         9       (1) First Health (NALC)       Kildare, Richard MD       S530.00       \$510.00       [       [	2	32224		(1) COMMONWEALTH O	Dietzen, Chuck MD	Head, Blake	\$65.00	\$65.00	
4       32112       (1) Moms insurance comp       Cohen, Sandra M.D.       Gumdrop, Billy       \$120.00       \$120.00       []         5       32169       (1) First Health (NALC)       Kildare, Richard MD       Doe, Gail       \$85.00       \$85.00       []         6       32170       (1) First Health (NALC)       Kildare, Richard MD       Doe, Gail       \$85.00       \$\$510.00       []         7       7       7       8       1       \$\$510.00       \$\$510.00       \$\$510.00       \$\$510.00       \$\$510.00       \$\$510.00       \$\$510.00       \$\$510.00       \$\$510.00       \$\$510.00       \$\$510.00       \$\$510.00       \$\$510.00       \$\$510.00       \$\$510.00       \$\$510.00       \$\$510.00       \$\$510.00       \$\$510.00       \$\$510.00       \$\$510.00       \$\$510.00       \$\$510.00       \$\$510.00       \$\$510.00       \$\$510.00       \$\$510.00       \$\$510.00       \$\$510.00       \$\$510.00       \$\$510.00       \$\$510.00       \$\$510.00       \$\$510.00       \$\$510.00       \$\$510.00       \$\$510.00       \$\$510.00       \$\$510.00       \$\$510.00       \$\$510.00       \$\$510.00       \$\$510.00       \$\$510.00       \$\$510.00       \$\$510.00       \$\$510.00       \$\$510.00       \$\$510.00       \$\$510.00       \$\$510.00       \$\$510.00       \$\$510.00	3	32215		(1) First Health (NALC)	Kildare, Richard MD	Doe, Gail	\$125.00	\$105.00	
5       32169       Image: State of the state o	4	32112		(1) Moms insurance comp	Cohen, Sandra M.D.	Gumdrop, Billy	\$120.00	\$120.00	
32170         Image: Marcine and M	5	32169	$\checkmark$	(1) First Health (NALC)	Kildare, Richard MD	Doe, Gail	\$85.00	\$85.00	
\$530.00 \$510.00	6	32170	$\checkmark$	(1) First Health (NALC)	Kildare, Richard MD	Doe, Gail	\$85.00	\$85.00	
							\$530.00	\$510.00	
<									

Step 10.

#### Click OK

as	sed A Payer	<ul> <li>Rendering Provider</li> </ul>		
	Submission for 3630095.2537	6870	X	e
	Process Submission			e
	Print HCFA form(s)			0
1	Process eStatements			u b
1	Reprocess Submission			0
	Remove Submission			t
			-	ľ
				l
				l
		<u>O</u> K <u>C</u> ancel		l
1				I.

Your Submission is being processed

>	ØfficeEMR Webpage Dialog
1	Submission 3630095.25376870. is now being processed
N N N	<u>O</u> K
3	$\square$

# Billing: Claim Submission Automated setup

#### **Claim Submission Automated**

Here are the steps for turning on the new automatic claims processing functionality. There are two parts to it:

- 1. Setting a status to be included
- 2. i.Go to Setup:



ii.Payers:



#### iii.Window Settings (gear)



#### iv.Go to Setup: Claim Status

	company
	User
Claim Status	Setup
Financial Class	
Claim Rejection Codes	Print
Payment Codes	Audit
ERA CARC	Refresh
ERA Amounts	Close
ERA Status/Payments	
Total C	aime

v.Select one of the Ready to Send statuses (Primary/Secondary/Tertiary), either paper or electronic

					$\times$
	🗋 🔹 💾 🎓 🚥 🗸	*		Claim Status #9	Ø
	Claim Status Values				
	Group *	System Status		~	·
-	Description *	Ready to Send Primary	y, Electronic		
	Display Order	11			
	Flags				
	<ul><li>✓ Secondary</li><li>✓ Update Status</li></ul>	Statement     Collection Status	Receipt     Skip Auto Receipt	Auto Submit Status	
	Claim Status Usage				

vi.Click the box marked Auto Submit Status



vii.Save



viii.Repeat for as many statuses as need to be set up. Only the Ready to Send statuses are available.

- 1. Turning on the time for claims to be batched/submitted
  - Go to Setup:



• Company Settings (or click the binoculars)



#### • Use 'auto' as your search keyword



5.

• Select the setting Auto Submit hour

	-	
,	-	
	•	
	- 1	
	,	

Setting	Auto Submit hour
Value	0
Rule	Integer value between 0 and 24
Tool Tip	Enter the hour of the day (Eastern Standard 0=Never,1=1am, 9=9am, 12=Noon, 14=2pn time

• Set a time using the one or two digit number equal to the time on the 24 hour clock - all times are Eastern Time

7.

Setting	Auto Submit hour
Value	12
Value	12

• Save





NOTE: The clearinghouse pickup time is 8 PM (Hour 20) Eastern / 5 PM Pacific for claims to be forwarded the same business day. If the Auto Submit hour is set greater than that, the claims will not be picked up by the clearinghouse until the next business day.

## Billing: Estatement Deposits from PaySimple

To Identify EStatement deposits from Pay Simple

If you are specifically just looking for the eStatement payments, then you can also click on the More button in Deposits and select Statement ePayments. Set a reporting date and then refresh to get the list.

#### Steps

1. Billing Portal



#### 2. Deposits



#### 3. More



4. Select EPayments



#### 5. Choose dates

Statement	Responsible Party	Patient	Amount	Message	Revie
Criteria: Start 08/02	2/2021 🔮 💳 End 09/17/202	211 🚔 💳		Refresh Mark Re	iewed Clo

#### 6. Refresh the list



You can also search for Statement deposits and look at the check/trace id. The eStatement payments will display CC information instead of a true check number.

#### 7. Go to the billing portal.



#### 8. Click on Deposits



9. Click on Advanced search

Adv	vanced Search 🔇
Ac	Deposit Status 🤤

Deposit Date		
Check/Trace	ID	
Model	🔓 🖲 Standard 🔿 Converted 🔵 Legacy	⊖ N/A

Please also note that in reports the payer is going to be the responsible party from the statement.

# Can I create a HCFA paper claim for a claim that was initially sent out electronically?

# Solution:

If the claim was initially sent out electronically, it can be printed out as a paper claim. But the following steps will need to be taken.

• Locate the claim that needs to be printed. Change the Claim to Ready to Send Primary, Secondary, Etc, Paper

Dpen 🝷 🖬	Save 🔻 😱 History 👻 📩 Payments 👻 👪 Patien
▲ Status	Pat
Claim	26856 🝷
Status	Info. requested from office
Substatus	Ready to Send Se Ready to Send Primary, Paper
	Ready to Send Tertiary. Electronic
Level	Ready to Send Primary, Paper
Type	Ready to Send Secondary, Paper
1,100	Ready to Send Tertiary, Paper
Owner	Ready to Send, Statement
	Payment Arrangement
837	Sent, Statement
	Sent, Electronic V
	Sent, Paper

• Create the Claim batch by Submitting Claims.

₽.	⊖ - Billing								
0	s		• 🕸 Setu	p Screens	•	Reporting Windows	8	▼ 🕚 → 🎇 Set Billing Info 🔹 🔍 Web Searches	• 🎓 •
2	2	2	- 🗟 - 🚨	- = -	, P	- 🔄 - 🙊 - м	av	Rows 9999	
	#	+	Claim	DOS	-8	Submit Claims		Status	Billing
	-		26956	06/30/21	B	Submit Statements	F	Peadu to Sand Drimany Danar	D
	<u> </u>		20030	00/30/21		View Submission	⊢	Ready to Selic Filmary, Paper	P

• Go to Claim Submission and locate your claim batch.



• Select your Claim batch, hit Process and select Process Submission to print the HCFA Form.

Submission Detail				X					
Submission ID: 3116935.17939554 Date: 01/28/2020 12:10PM (EDT) Ba Cum Total: 1 BillingMD Failed: 0 BillingMD Pase	tch Type: HCFA Primary Cla sed: 1	ims Created	By: Weber, Ama	nda					
Submission Details				Row 1 of 1					
Claim A Passed A Payer A Rendering Provider A Patient Total Balance									
1 26799 Vubmission for 3116935.17939554	× Bst, Carole	\$249.00	\$249.00						
Process Submission Process eStatements Reprocess Submission Remove Submission Note: One claim has been modified since submission created.	was	\$249.00	\$249.00						
View Submission Onen Claim Onen Datient UCEA			ſ	Process					
Tor Submission Open Shann Open Palletik NOTA				E100033					

### **Billing: Enter an Authorization**

Best practice for tracking Authorizations.

When entering an authorization, you must make sure you are entering the auth as it was approved.

For example, if there is a start and end date then put in a start and end date to make sure the system is tracking this authorization for you. The Reason entered is dependent on the authorization reason and that it is for internal use only. Lastly the Referring I would put is optional as is some cases it is not needed.



1. Select the patient index card to open the patient setup screen

2. Select "More" Select "Authorizations" to enter authorization information for visit



3. Select the "Referred To" tab. Select the paper with the green + sign at the bottom of the screen to add a new authorization

Authorizations	Total .			Show all authorization	s Row 0 o
A Status	Reason	Referred To	Payer	Coverage Start	End
o data found					

4. -Enter the reason as "Consult and Treat" -Select Status as "Received" -Select Tracking as "Referred to" -Select Type as "Authorization" -Enter Auth # -Select Insurance -Select Rendering provider -Search & select referring provider (if not populated) -Enter effective start & end date -Enter # Visits authorized Select "OK" Note here you can also enter visits and or units with a warning for the system to track the authorization for you.

Authoria	zation New										
Authorizatio	on				Effect	tive			Amount		
Reason	Xofigo Infusion				Start	0	9/01/20	21 😂 💳	Amount		
Status	Needs Review Received Auth not required	Tracking	✓ Referred To Referred By	$\hat{}$	End Warni	⊡" [1 ing [1	0/31/20 0/15/20	121 😂 📩 121 😂 📩	Used Warning >	Amoun	ıt
Auth Date	External PA 09/01/2021	Туре	✓ Authorization	$\hat{}$	Visits # Visit	ts 8	U	sed	Units # Units	Used	
Auth #	123456789	Auth By			Warni	ing wil	occur	after 6 Visits	Warning will occ	ur after	Units
Created		Created By			Facilit	y					
Call Date		AM			Comr	nent					^
Service	×										$\sim$
Referring	ng Referring Selected insurance is Primary Procedure							Description			
	Patient has been seen Referral letter with results sent out/received Care for condition was assumed						06	RADIUM RA-22	DICHLORIDE TH	ERAPEUTIC	
Rendering	Bolan P.AC, Amy E. Byrd MD, Gregory F. Cameron MD, Brent			^	1	ŧ		• × 🗊	Code		2
	Castor PA-C, Zachary			$\sim$	Diagn	iosis					
Insurance	Active Payer		Coverage	~	~		Code		Description		
	Inactive Payer	E OEINIOEO	Coverage								$\sim$
	Self Pay		Secondary	~				•			~
					Т	•			Code		

Once the Auth is entered the iScheduler will track the authorization for you.

The authorization is also tracked in the billing portal via the claim entry screen

Lastly the provider can see it within the EMR via the Superbill chart tab

### Billing: Pull a Referring Provider list

How to Pull a referring Provider list

1.Got to the Billing Portal



2. Click on the top tool bar on the down arrow by setup screens tool tip and click provider.



3. Once the provider search opens click on advanced Search.

Click here to use advanced search features						
	ch <b>OProvide</b>	r :				
Last Na		NPI =				

#### 4. Choose referring

Advance	×	
▼Commonly l	Jsed	•
Doctor #		Ê
Rendering	○ N/A ○ Rendering	
✓ Demographi	cs	

#### 5.Click Search.



6. The list will populate. Now you can print to pdf or export to excel by navigating to the purple gear.

Provider Search Security Screen Company User Setup Print Audit Refresh	
Security Screen Company User Setup Print Audit Refresh	
NPI = Screen Company User Setup Print Audit Refresh	
789 User Setup Print Audit Refresh	
769 User Setup Print Audit Refresh	
Setup Print Audit Refresh	
Print Audit Refresh	
Audit	
Refresh	
Close	
<b>Wiew Report</b>	
How would you like to view your repo	ort?
Print	

#### Choose print

# **Billing: Locate Submitted Statement Batches**

You would be able to see past submitted batches via the billing portal.

1.Please navigate to batches under the statements blue bar.

2.Click on Advanced Search.
3. Choose submitted and the dates you are viewing on the statement.

4. Then Click Search.

The previous batches will show in the queue.

# How do I print a patient transaction history?

#### Patient transaction history PM report

You may also go to Reports portal,



#### PM Reports

Report	<<	📥 🔹 кероп: Рм к	ероптя		EN I Associates of San D
My Tasks	×	Report Search			
Audit		Catogony		Roport	Y
Security		Calegory		Report	
Logins		- Patient			
Payment				0	
Tickets		Last Name		Chart #	to
Urology Extract		First Name		Balance	to
Billing		- Claim			
Billing Analytics					
Billing Analytics (Adv.)		Place Of Service	🔵 Equal 🔘 Not Equal 📔		$\checkmark$
PM Reports		Date of Service	to	Code Range	to
Transactions	-	Dute of Corrido		oodoridiigo	
eDocuments		Post Date	to	Payer	
Disk Space		– Payment/Receipt			And Or
EMR		Denosit Date	to	Payment Type	×
Summary of Care		Deposit Date		таушенстуре	
Connect		Post Date	to	Adjustment Type	· · ·
iReport		- Provider			
My Task Counts	$\checkmark$				
Prescription Loa		Last Name/Doctor #		Group	
		First Name			
Administration		Appointment			
🧏 Setup		Appointment			
Deports		Date	to	Appointment Status	×
Keports	_	Post Date	to	Resource	
💆 EMR		1 USI DUID		10500100	
iScheduler		Clear		Launch Report	t Query Manager <u>Close</u>
🏥 Billing					
🗐 aDacumente					

Choose patient transaction history

Report Search	1				
Category	BillingMD - Claim	$\mathbf{v}$	Report	Patient Transaction History	$\checkmark$
Datient					
Put in the	chart #				
Chart #					
Then click	launch report				
Resource	Report				

### Billing: How to update Provider Credentials

Credentials For Payers by Provider

1.Log in:

2.Go to Set up

Basic Setup	
Company Profile	^
Contacts	
Implementation	
Location Categories	
Locations	
Patients	
Providers	
Referral Source	
User Groups	
Users	
Schedule Setup	

- 3.Providers
- 4. Search for the provider on the upper right

🔒 🔹 Setup: Providers			Urology of Indiana 🚍		<i>8</i> T	F () ()
Provider	New Save Train More			Batler I	MD, Robert A.	<b>\</b>
Summary						
Demographics						
Identification						
Billing Addresses		65		7 8 2 5		
Miscellaneous		00		7,000		
		Providers		Providers		
				Search for an exis	sting Provi	der.

#### 5. Once the provider is selected click on the more button

$\bigcirc$	
More	

### 6. After click on more, click on credentials, the provider credentials box will open:

Sys ID	Payer Name	Financial Class	Payer ID	Pin/Group	P	1	2	3	4	5			
5564	Ambetter MHS	Medicaid	68069		-			*	*		~		
45624 Medicaid Anthem Hoosier Healt M		Medicaid	Paper		-			*					
5627	Medicaid EDS Secondary	Medicaid	SKIN0		-			*					
5630	Medicaid Managed Health Serv	Medicaid	paper		-			*					
5633	Medicaid 2018 MDwise Care C	Medicaid	paper		-			*					
5756	DO NOT USE	Medicaid	26160		-				*				
5798	Not valid	Medicaid	paper		-				*				
5801	HIP Anthem	HIP	SB630		-	✓		×	*				
5804	HIP Caresource	HIP	paper		-			*			~		
	ta providor orođontiolo vill immodiat	lu taka affaat		Dravidar			odor	tial		Now	5		

### 7. To enter a new credential click on new

Sys ID	Payer Name	Financial Class	Payer ID	Pin/Group	Ρ	1	2	3	4	5	
5564	Ambetter MHS	Medicaid	68069		•			*	*	~	
5624	Medicaid Anthem Hoosier Healt	Medicaid	Paper		•			*			
5627	Medicaid EDS Secondary	Medicaid	SKIN0		-			*			
5630	Medicaid Managed Health Serv	Medicaid	paper		-			*			
5633	Medicaid 2018 MDwise Care C	Medicaid	paper		•			*			L
5756	DO NOT USE	Medicaid	26160		-				*		
5798	Not valid	Medicaid	paper		-				*		
5801	HIP Anthem	HIP	SB630		-			*	*		
5804	HIP Caresource	HIP	paper		•			*		~	
				Dravidar			rodont	ial			i.

#### 8. Find the payer you want to create a credential

Add Payer (	Credential	X		
-			H	
Payer	Payer Name Q		μ	2
e Pin/Group			L	2
Participating			L	;
(				;
c				;
T			Π	ſ
- c			Ľ	ſ
-			Ľ	
-			Η	
-			Η	1
	Capal		en	nti
	Save		Γ	

### 9. Choose the tab that the credential needs to be created appropriately.

B) E	lectro	nic Piı	/Group Values					Row 1 of 19			
	Use	ID		Description			Pin/Group				
1	~	EI	Employer's Ident	ification Number							
2	$\checkmark$	xx	National Provide	ational Provider ID (NPI)							
3		1A	Blue Cross Provi	Je Cross Provider Number							
4		1B	Blue Shield Prov	ider Number							
5		1H	CHAMPUS Ident	ification Number							
6		FH	Clinic Number								
7		1J	Facility ID Numb	er							
8		BQ	Health Maintena	nce Organization (	Code Number						
9		LU	Location Number								
10		1D	Medicaid Numbe	r							
11		1C	Medicare Numbe	۲							
12		<b>B</b> 3	Preferred Provide	er Organization Nu	Imber						

#### 10. When complete click on apply and ok

### **Billing: Authorization Report**

#### Authorization Report in Billing Portal

In this document we will train you how to work through the Authorization Report.

1. Navigate to the Billing Portal.



2. Click on Authorizations under the Blue Insurance Bar.



3. Now you can view the search criteria to find an Authorization.

Searc	h Criteria	Search	Results					Max R	lows 25		Clear	Search
Authorizat	ion				Effe	ctive S	tart Date		Effect	tive E	nd Date	
Reason	Now				Start			\$	Start			0
Туре	✓ Free Form Appointment Claims with I	s with Missing/I dissing/Invalid	Invalid Author Authorization	izations s	End Auth Start	orizati	on Date		End Visits Visits	/Amo Left	unt <	
Status	Needs Revie Received Auth not req Inactive	w uired	Tracking Claim	Referred By Referred To Authorization Referral	End	ٹت Proced	ure		Units Amou	Left nt Left	<	
Payer					< >							~
Rende	ring		Provid	ier		Diagno	sis					
		^			^							^
		~			~							~

4. After entering your criteria click on search.

	test	
	Free Form Appointments with Missing/Invalid Claims with Missing/Invalid Author	Authorizations
	Appointment Date	Scheduled With
d yer	Start 02/15/2021 End 02/26/2021 Appointment Status Scheduled Confirmed No-Show	Byrd MD, Gregory F. Cameron MD, Brent Castor PA-C, Zachary Clinical Research Conference Room Cook MD, Barbara CT Davis MD, Jeffrev
	Checked-In Checked-Out Cancelled Reminder Sent	East DTE East Lab Farha MD, Ayham

5. Then your search result will open in the next tab

				Max	Rows 25	Ujeai	Deq	ui
4	Appointments w	ith Missing/Invalid Authorizations					Row 0 of	25
	Status	Patient	Scheduled	✓ App. Date	Primary	Second.	Tertiary	~
1	Checked-Out	Galindo Moreno, Ramon	Castor PA-C, Zachary	02/26/2021 3:30PM	۲	×	× .	
2	Checked-Out	Weber, Denise A.	Jensen MD, Jonathan A.	02/26/2021 2:30PM		<ul> <li>Image: A second s</li></ul>	<ul> <li>Image: A second s</li></ul>	
3	Checked-Out	Robl, Richard M.	Nabbout MD, Philippe	02/26/2021 2:00PM		<b>~</b>	× .	
4	Scheduled	Ryan, John P. II (Patrick)	Farha MD, Ayham	02/26/2021 11:30AM		<b>~</b>	<ul> <li>Image: A second s</li></ul>	
5	Checked-Out	Jones, James M. (Jim)	East DTE	02/25/2021 4:00PM		<b>~</b>	× .	
6	Checked-Out	Higbee, Dan F.	Saad MD, Kahlil	02/25/2021 3:30PM		<b>~</b>	~	

6. Double click on the authorization to view the Auth or change information in the Auth.

Authorizat	ion				Effective		Amount	
Reason					Start 02/25/20	21 😂 💳	Amount	
Status	Needs Review	Tracking Type	Referred To     Referred By     Referral     Authorization	\$ \$	End 🗗 08/24/20 Warning 07/24/20 Visits	21 😂 📩	Used Warning > /	Amou
Auth Date				$\sim$	# Visits Us	sed	# Units Use	d
Ref#	VA0011983396	Auth By	VA		Warning will occur	after Visits	Warning will occur afte	.r
Created	03/02/2021	Created By	Icooper		Facility			
Call Date		$\sim$						
Service								
Referring	Referring Patient has been seen	Q Sel	ected insurance is Prima	ary 🗌	Procedure Code		Description	
	Referral letter with results     Care for condition was ass	sent out/receiv urned	red					
Rendering	Byrd MD, Gregory F. Cameron MD, Brent Castor PA-C, Zachary Cook MD, Barbara			\$	↑ ↓ □ ↓ Diagnosis	× 🗉	Code	
			_		✓ Code		Description	
Insurance	VA CCN CLAIMS-MEDICAL		Coverage Primary					
				$\sim$	↑ ↓ □ ◀	× 🗉	Code	
A Manu							OK Cancel	

### Billing: Special Message on Statement Setup

Follow these steps to Access the Statement Setup Screen:



1. Log in to the software and Open the **Billing** Portal.



- 3. Click the Gear icon at the top right of the screen and select Setup.
- 4. The Statements Settings Screen appears.

etup		Cycles				
✓ Balance Forward		Letter	Day of Month	Count	Actions	
Auto Cond Clater	nant Cuela Ratabaa		Missing Res	ponsible Party C	ount	
Auto-Seliu State	neni cycle balches	A - 4				^
Threshold \$10.0	10	B - 41				
Minimum Days from I	ast Statement 28	C - 151				
Auto Send Warn		E - 62				
Auto-Seliu Walli.		F - 31				
Envelope Ba	ise 🗸 🗸	G - 33				
Processor	alus 🗸	H - 80				
		I - 97				
lessages		J - 7				
Message Based On	Statement Aging O Statement Counts	K - 41				
message based on		L - 50				
1. AR 0-30 Days	Please pay balance due	M - 65				
2 AD 31.60 Dave	Your balance is currently 60 days old	N - 128				
2. AR 51-00 Days		P - 16				
<ol><li>AR 61-90 Days</li></ol>	Your balance is currently 90 days old.	Q - 60				
4. AR 91-120 Days	Your balance is currently 120 days old.	R - 4				
5. AR 121-150 Davs	Your balance is currently 150 days old.	S - 53				
A. A.D. 450 Dave	Your balance is currently over 150 days	T - 164				
<ol> <li>AR &gt; 150 Days</li> </ol>	Tour balance is currently over 150 days	U - 49				
Past Due Notice Leve	el 🔿 N/A 🔿 1 🔿 2 🖲 3 🔿 4 🔿 5 🔿 6	V - 3				
Past Due St	atement will include all details	W - 16				
Final Notice Level		X - 114				L
		7.6				~
Final Notice	Statement will include all details	LZ - D				_

1. Click on More Statement settings.



#### 1. Click on Messages (Special)

	Statement	Rules and Settings (PERSE)	
Groups	Settings		
Company Setting	Setting	Prompt payment message	#7
Miscellaneous (1)	Value	Thank you for your prompt payment	
Build (8) Contact Information (5) Credit Card (4)	^	Message to display when client has n within the last 30 days. Valid String value	nade a payment
Display (12) Messages (Special) (4)	Setting	Special Message 1	#15 🙀
Vendor (2)	Value	Special Message 1	
		Special Message 1	
		Valid String value	
Ν	Setting	Special Message 2	#16 🙀
12	Value	Special Message 2	
		Special Message 2	
	~	Valid String value	

- 7. Change the messages to your specifications.
- 8. Click on Contact information, and change to your specifications.

		(PERSE)	
Groups	Settings		
Company Setting	Setting	Contact Hours	^{#9} 🛱 🔨
Miscellaneous (1) Build (8)	✓ Value	9am - 5pm	
Credit Card (4) Display (12) Messages (Special) (4)		Phone Description #1 Valid String value	
Vendor (2)	Setting Value	Contact Days Monday - Thursday	#10 🌣
		Phone Description #2 Valid String value	
\$-	Setting Value	Billing Inquiry Message For Billing Inquiries or Comments, pla	#25
		<u>R</u> efresh	Close

Statement Rules and Settings (PERSE)

Billing: Billing Profile Contact information update

Company Settings for Statement Rules and Settings -- Webpage Dialog

The billing profile is the information that goes on to the statement. Sometimes you may need to update your address or phone number. Please follow these steps below to change your contact information as it relates to billing.

1.Go to the Setup Portal



2. Click on Company Profile



3. Change the profile to billing by navigating to the magnifying glass and choose billing.



4. Click on Contacts and change to your specifications.

	Primary Contac	t
	Name	Jill Smith
	Email	Jill@aolwefwef
	Phone	(317) 687-8128 Ext 123 work
	Secondary Con	tact
	Name	(888) 672-8500
	Email	
Summary	Phone	Ext
Demographics	Copy Practice Va	alues
Contacts		

### Billing: How to Remove a Deposit

When initially moving the Choice product, you may have a deposit that imported into Choice for claims that were not created in Choice. The deposit needs to be entered into the client's previous system. This document is to demonstrate how to remove the deposit.

1. Go to Billing module and select Deposits under Payment Posting.



2. Select the Deposit that needs to be removed.

eposit Det	tails										Deposit Action	ns
D	419	Type ERA	Check #	CC9				Deposit	s	0.00	Send to Postin	ng
Status	New		Payer	1			٩	Payments	s	0.00	🔷 Ignore	
Owner	admin		Q Pay Meth	era N	on-Payment			Adjustment	s Si	0.00	/ Edit	
Deposited	08/23/2021	Issued 08/24/2021	Pay Type	EOB O	nly			Exclusions	s	0.00	× Reset/Remove	e
View ERA	A Details 🔂 Op	en Human Readable ERA			Menna	56					Action	
View ERA	A Details 🔄 Op ors Amount	en Human Readable ERA			Messa	je					Action	
View ERA Deposit Erro ID 212	A Details P Op ors Amount \$0.00	en Human Readable ERA Payer Mismatch: AETNA			Messay	90					Action	\$
View ERA eposit Erro ID 212 record(s) de	A Details C Op ors Amount 50.00 isplayed, of which 1	een Human Readable ERA Payer Mismatch: AETNA Is unresolved			Messag	90					Action	0
View ERA eposit Erro ID 212 record(s) di eposit Cla	A Details P Op OFS Amount S0.00 splayed, of which 1 tims	en Human Readable ERA Payer Mismatch: AETNA is unresolved			Messay	je		Find Claim	Search By PC	CN, Claim or Cha	Action Resolve	•
View ERA eposit Erro ID 212 record(s) dis eposit Cla Claim X	A Details Op ors Amount S0.00 splayed, of which 1 sims iref Claim ID	en Human Readable ERA Payer Mismatch: AETNA is unresolved Charged	Paid Al	lowed (B6)	Messar Deductible (PR-1)	pe Coins (PR-2)	CoPay	Find Claim (PR-3)	Search By PC	CN, Claim or Chai	Action Action Resolve t Number Action	•

3. Prior to removing the Deposit, review it to verify that it needs to be removed. This can be done by reviewing the Human Readable ERA. If the Claim ID is 0 this may also mean the Claim was not created in Choice.

Deposit Det	tails										Deposit Actio	ns
ID	419	Type ERA	Check #	CC9				Deposit	s	0.00	Send to Posti	ng
Status	New		Payer				٩	Payments	5	0.00	Ignore	
Owner	admin		Pay Method	ERA Non-Pa	ayment			Adjustments	s S	0.00	🥖 Edit	
Desselled	00/23/2021	08/24/2021	Day Trees	EOR Oak							14 0 10	
View ERA	Details Op	en Human Readable ERA	ray type	coooniy	Harry			Exclusions	3	0.00	X Reset/Remov	•
View ERA	Amount	en Human Readable ERA	ray 13pe	coooliy	Message	0		Exclusions	3	0.00	Action	•
View ERA Deposit Erro ID 212	A Details Op OfS Amount 50.00	en Human Readable ERA Payer Mismatch: AETNA	] ray 1396	Los duy	Message	0		Exclusions	3		Action	•
View ERA Deposit Erro ID 212 f record(s) di Deposit Cla	Amount Sologi Sologi Sologi Sologi Sologi Sologi Sologi Sologi Sologi Sologi Sologi Sologi Sologi Sologi Sologi Sologi Sologi Sologi Sologi Sologi Sologi Sologi Sologi Sologi Sologi Sologi Sologi Sologi Sologi Sologi Sologi Sologi Sologi Sologi Sologi Sologi Sologi Sologi Sologi Sologi Sologi Sologi Sologi Sologi Sologi Sologi Sologi Sologi Sologi Sologi Sologi Sologi Sologi Sologi Sologi Sologi Sologi Sologi Sologi Sologi Sologi Sologi Sologi Sologi Sologi Sologi Sologi Sologi Sologi Sologi Sologi Sologi Sologi Sologi Sologi Sologi Sologi Sologi Sologi Sologi Sologi Sologi Sologi Sologi Sologi Sologi Sologi Sologi Sologi Sologi Sologi Sologi Sologi Sologi Sologi Sologi Sologi Sologi Sologi Sologi Sologi Sologi Sologi Sologi Sologi Sologi Sologi Sologi Sologi Sologi Sologi Sologi Sologi Sologi Sologi Sologi Sologi Sologi Sologi Sologi Sologi Sologi Sologi Sologi Sologi Sologi Sologi Sologi Sologi Sologi Sologi Sologi Sologi Sologi Sologi Sologi Sologi Sologi Sologi Sologi Sologi Sologi Sologi Sologi Sologi Sologi Sologi Sologi Sologi Sologi Sologi Sologi Sologi Sologi Sologi Sologi Sologi Sologi Sologi Sologi Sologi Sologi Sologi Sologi Sologi Sologi Sologi Sologi Sologi Sologi Sologi Sologi Sologi Sologi Sologi Sologi Sologi Sologi Sologi Sologi Sologi Sologi Sologi Sologi Sologi Sologi Sologi Sologi Sologi Sologi Sologi Sologi Sologi Sologi Sologi Sologi Sologi Sologi Sologi Sologi Sologi Sologi Sologi Sologi Sologi Sologi Sologi Sologi Sologi Sologi Sologi Sologi Sologi Sologi Sologi Sologi Sologi Sologi Sologi Sologi Sologi Sologi Sologi Sologi Sologi Sologi Sologi Sologi Sologi Sologi Sologi Sologi Sologi Sologi Sologi Sologi Sologi Sologi Sologi Sologi Sologi Sologi Sologi Sologi Sologi Sologi Sologi Sologi Sologi Sologi Sologi Sologi Sologi Sologi Sologi	Payer Mismatch: AETNA	1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1		Message	0		Find Claim	Search By P	CN, Claim or Char	Action Action Resolve tNumber	•
View ERA Deposit Erre ID 212 1 record(s) dit Deposit Cla Claim Xi	Amount Amount Amount So.00 aplayed, of which f ims ref Claim ID	Payer Mismatch: AETNA	Allowe	1 (66) Ded	Message ductible (PR-1)	e Coins (PR-2)	CoPay	Find Claim	Search By P Adjustments	CN, Claim or Char Information	Action Action Resolve t Number Action	•

4. Click on Reset/Remove to remove the deposit. Note: Once the deposit has been removed, this cannot be undone.

ID	419	Type ERA	Check #	CC	Deposit	\$0.00	Send to Posti	ing
Status	New		Payer	٩	Payments	\$0.00	Ignore	-
Owner	admin	9	Pay Method	ERA Non-Payment	Adjustments	\$0.00	/ Edit	
Deposited	08/23/2021	Issued 08/24/2021	Pay Type	EOB Only	Exclusions	\$0.00	× Reset/Remov	e
ID	Amount	Rese	t or Remove	Deposit		×	Action	
ID 212	Amount	Paver Mismatch: AF	t or Remove	Deposit		×	Action	^
ID 212 I record(s) dis	Amount \$0.00 played, of which 1	Payer Mismatch: AE	t or Remove	Deposit mation, how would you like to proceed?		X	Action Resolve	0
ID 212 I record(s) dis	Amount \$0.00 played, of which 1	Payer Mismatch: AE is unresolved 1 Dep 1 Clai 1 Pay	t or Remove the following infor osil record m records	Deposit mation, how would you like to proceed?		Y PCN. Claim or Cha	Action  Action  Resolve  art Number	0
ID 212 1 record(s) dis Deposit Clai	Amount \$0.00 played, of which 1 ms ef Claim ID	Payer Mismatch: AE is unresolved I Deg 1 Charged O Ser	t or Remove he following info xosit record im records ment records m Adjustment re vice Line Adjust	Deposit Imation, how would you like to proceed?		Y PCN, Claim or Cha	Action Action Resolve art Number Action	0
ID 212 I record(s) dis Deposit Clai Claim Xr	Amount 50.00 played, of which 1 ms ef Claim ID 0	Payer Mismatch: AE is unresolved Charged \$0.000 Charged \$0.000 Charged \$0.000 Charged \$0.000 Charged \$0.000 Charged \$0.000 Charged \$0.000 Charged \$0.000 Charged \$0.000 Charged \$0.000 Charged \$0.000 Charged \$0.000 Charged \$0.000 Charged \$0.000 Charged \$0.000 Charged \$0.000 Charged \$0.000 Charged \$0.000 Charged \$0.000 Charged \$0.000 Charged \$0.000 Charged \$0.000 Charged \$0.000 Charged \$0.000 Charged \$0.000 Charged \$0.000 Charged \$0.000 Charged \$0.0000 Charged \$0.000 Charged \$0.0000 Charged \$0.0000 Charged \$0.0000 Charged \$0.0000 Charged \$0.0000 Charged \$0.0000 Charged \$0.0000 Charged \$0.0000 Charged \$0.0000 Charged \$0.0000 Charged \$0.0000 Charged \$0.0000 Charged \$0.0000 Charged \$0.0000 Charged \$0.0000 Charged \$0.0000 Charged \$0.00000 Charged \$0.00000 Charged \$0.00000 Charged \$0.00000 Charged \$0.000000 Charged \$0.00000000 Charged \$0.00000000000000000000000000000000000	t or Remove he following info yoil record im records im Adjustment re vice Line Adjust re cords ted Payments re	Peposit mation, how would you like to proceed? ecords ment records ecords		PCN, Claim or Cha     Information     0 \$1,725.00	Action Action Resolve art Number Action Edit	0
ID 212 1 record(s) dis Deposit Clair Claire Xr	Amount S0.00 played, of which 1 ms ef Claim ID displayed, zero p	Payer Mismatch: AE is unresolved Charged Charged S0.00 Charged Charged Charged Charged Charged Charged Charged Charged Charged Charged Charged Charged Charged Charged Charged Charged Charged Charged Charged Charged Charged Charged Charged Charged Charged Charged Charged Charged Charged Charged Charged Charged Charged Charged Charged Charged Charged Charged Charged Charged Charged Charged Charged Charged Charged Charged Charged Charged Charged Charged Charged Charged Charged Charged Charged Charged Charged Charged Charged Charged Charged Charged Charged Charged Charged Charged Charged Charged Charged Charged Charged Charged Charged Charged Charged Charged Charged Charged Charged Charged Charged Charged Charged Charged Charged Charged Charged Charged Charged Charged Charged Charged Charged Charged Charged Charged Charged Charged Charged Charged Charged Charged Charged Charged Charged Charged Charged Charged Charged Charged Charged Charged Charged Charged Charged Charged Charged Charged Charged Charged Charged Charged Charged Charged Charged Charged Charged Charged Charged Charged Charged Charged Charged Charged Charged Charged Charged Charged Charged Charged Charged Charged Charged Charged Charged Charged Charged Charged Charged Charged Charged Charged Charged Charged Charged Charged Charged Charged Charged Charged Charged Charged Charged Charged Charged Charged Charged Charged Charged Charged Charged Charged Charged Charged Charged Charged Charged Charged Charged Charged Charged Charged Charged Charged Charged Charged Charged Charged Charged Charged Charged Charged Charged Charged Charged Charged Charged Charged Charged Charged Charged Charged Charged Charged Charged Charged Charged Charged Charged Charged Charged Charged Charged Charged Charged Charged Charged Charged Charged Charged Charge	et or Remove he following info posit records mean records mean records m Adjustment re vice Line Adjust v records led Payments re emove all depor	Poposit mation, how would you like to proceed? ecords ecords ecords et information.		Y PCN, Claim or Che Information 00 \$1,725 00 Page (He 4	Action  Action  Resolve  art Number  Action  Edit  1  H H of	

5. A Remove Deposit window will appear to confirm the deposit has been removed.

the following items were removed	vencountered	u.
Deposits	1	Removed
Deposit Claims	2	Removed
Deposit Claim Payments	4	Removed
Deposit Adjustments	6	Removed
Deposit Errors	4	Removed

### Billing: How to Reset a Deposit

There may be an instance when a deposit will need to be reset. Once a deposit is reset it will revert to its original settings prior to when it was previously posted. A reset deposit can affect various billing reports, as this will now change the post date for the deposit. This document is to demonstrate how to reset the deposit.

1. Go to Billing module and select Deposits under Payment Posting.



2. Select the Deposit that needs to be reset.

Deposit Det	tails										Deposit Action	15
ID	419	Type ERA	Check #	CC9			De	eposit	s	0.00	Send to Postin	g
Status	New		Payer				Q Pi	yments	s	0.00	🔷 Ignore	
Owner	admin		Q Pay Method	ERAN	on-Payment		A	ljustments	s	0.00	/ Edit	
Deposited	00000001			EOR O	nlu							
View ERA	Amount	en Human Readable ERA	Pay Type	EUBU	Messa	04		Clusions	3		Action	
View ERA Deposit Erro	A Details Op Ors	en Human Readable ERA	Pay Type	EOBO	Messa	90		clusions	3		Action	•
View ERA Deposit Erro ID 212	Amount 50.00	en Human Reedable ERA Payer Mismatch: AETNA	Pay Type	2000	Messa	pe		clusions	3		Action	•
View ERA Deposit Erro ID 212 ( record(s) dia	A Details Op Ors Amount S0.00 Splayed, of which 1	Payer Mismatch: AETNA	Pay Type	2000	Messag	pe		Clusions	3		Action	•
View EPA Deposit Erro ID 212 ( record(s) dia Deposit Cla	A Details Op A Mount So 00 Spleyed, of which 1 sims	Payer Miamatch: AETNA	Pay Type		Messa	90		ind Claim	Search By P(	CN, Claim or Char	Action Action Resolve	•
View EPA Deposit Erro ID 212 f record(s) di Deposit Cla Claim X	A Details Op A Details Op Ors Amount S0.00 splayed, of which 1 ims ref Claim ID	Payer Miamatch: AETNA Payer Miamatch: AETNA is unresolved Charged Pi	Pay Type	ved (86)	Messa Deductible (PR-1)	ge Colns (PR-2)	CoPay (F	ind Claim	Search By PC	2N, Cleim or Cher Information	Action Action Resolve Number Action	

3. Prior to resetting the Deposit, review to verify that it needs to be reset. A reset effects all the claims within the deposit. Be aware that a reset of a deposit will affect billing reports due to the change in the post date of the claim.

Deposit Det	ans								Deposit Action	ns
ID	419	Type ERA	Check #	CC9		Dep	osit	\$0.00	Send to Posti	ng
Status	New		Payer			Q Payr	ments	\$0.00	Ignore	
Owner	admin		Pay Method	ERA Non-Payment		Adju	stments	\$0.00	/ Edit	
Deposited View ERA Deposit Erro	08/23/2021 0	Issued 08/24/2021 💭 🗖	Pay Type	EOB Only Mess	age	Exc	usions	50.00	Action	re
Deposited View ERA Deposit Erro	08/23/2021 0 Details 0 Ors Amount	ssued 08/24/2021 🔵 🗖	Pay Type	EOB Only Mes	age	Exc	usions	50.00	Action	
Deposited View ERA Deposit Erro 1D 212	08/23/2021 0 1 Details Or OFS Amount 50.00 Inference of which 1	Issued 08/24/2021 () The second secon	Pay Type	EOB Only Mes	age	Exc	usions	50.00	Action	•
Deposited View ERA Deposit Erro ID 212 1 record(s) dis Deposit Clair Ctaim Xr	OB/23/2021 C L Details Op OFS Amount \$0.00 uplayed, of which 1 ims ref Ctaim ID	Issued 08/24/2021 () Charged Pager Mismatch: AETNA	Allowe	d (B6) Deductible (PR-1	Lage	Fin CoPay (PR	d Claim Search	By PCN, Claim or Cha	Action Action Resolve rt Number Action	•

4. Click on Reset/Remove to remove the deposit. Note: Once the deposit has been reset, this cannot be undone.

opean Dec					1					
ID	419	Type ERA		Check #	CC		Deposit	\$0.00	Send to Post	ng
Status	New			Payer		٩	Payments	\$0.00	Ignore	
Owner	admin		Q	Pay Method	ERA Non-Payment		Adjustments	\$0.00	/ Edit	
Deposited	08/23/2021	Issued 08/24/202	1 0	Pay Type	EOB Only		Exclusions	\$0.00	× Reset/Remov	e
Deposit Erro	ors Amount		P Reset	or Remove	Denosit			×	Action	
Deposit Erro	210 Structure	_							Action	
ID	Amount	Daver Mismatch: AF	Reset	or Remove	Deposit			×	Action	^
ID 212	Amount \$0.0	Payer Mismatch: AE	Reset	or Remove	Deposit			×	Action	0
ID 212 1 record(s) dis	Amount S0.0 isplayed, of which	Payer Mismatch: AE	Reset	or Remove	Deposit mation, how would you like to proceed?			×	Action Resolve	0
ID ID 212 1 record(s) dis Deposit Clai	Amount S0.0 splayed, of which	Payer Mismatch: AE	Reset Given the 1 Depor 1 Claim 1 Paym	or Remove e following infor sit records a records sent records	Deposit mation, how would you like to proceed?			Y PCN, Claim	Action Resolve	0
ID ID 212 1 record(s) dis Deposit Clai Claim Xr	Amount S0.0 splayed, of which tims tref Claim I	Payer Mismatch: AE	Reset Given the 1 Depo: 1 Claim 1 Paym 1 Claim 0 Servic	or Remove e following infor isit record a records isent records an Adjustment re ce Line Adjust	Deposit rmation, how would you like to proceed? ecords ment records			Y PCN, Clain	Action Action Resolve n or Chart Number ation Action	
ID ID 212 1 record(s) dis Deposit Claim Claim Xr	Amount S0.0 splayed, of which ims ref Claim I 0	Payer Mismatch: AE     // is unresolved     Charged     S0.00	Reset Given the 1 Depor 1 Claim 1 Paym 1 Claim 0 Servic 2 Error 0 Poste	or Remove e following infor set records a records a Adjustment re ce Line Adjust records ed Payments re	Deposit rmation, how would you like to proceed? ecords ment records ecords			Y PCN, Claim Inform 00 \$1	Action Action a or Chart Number ation Action 1,725 00 C Edit	
ID 212 1 record(s) dia Deposit Clair Clair Xr	Armount Sol.0 splayed, of which tims izef Claim I 0	Payer Mismatch: AE     AE     D     Charged     S0.00	Reset Given the 1 Depo: 1 Ctaim 1 Paym 1 Ctaim 0 Service 2 Error 0 Poste	or Remove solowing infor isit records nent records adjustment re ce Line Adjust records ad Payments re	ecords			Y PCN, Claim Inform 00 \$1	Action Action or Chart Number ation Action Action Action Content Action	0
ID ID 212 1 record(s) dia Deposit Claim Claim Xr 1 of 1 records	Amount Solo splayed, of which ims iref Claim I 0 s displayed, zero	Payer Mismatch: AE     T is unresolved      Charged     S0.00      costed	Given the 1 Depoin 1 Claim 1 Paym 1 Claim 0 Servix 2 Error 0 Poste Res	or Remove solowing infor sit records nectords nectords adjustment re ce Line Adjust records ad Payments re move all deposit set the deposit	Deposit      mation, how would you like to proceed?  ecords ment records ecords ecords el information. t. recalculating payment information.			Y PCN, Clain     Inform     D0 \$1     Page [H4]	Action Action ar or Chart Number ation Action 1,725.00 Ctdt	
Deposit Erro ID 212 1 record(s) dia Deposit Clain Claim Xr 1 1 of 1 records	Amount S0.0 splayed, of which tims ref Claim I 0 s displayed, zero	Payer Mismatch: AE     T is unresolved     Charged     S0.00     Solution	Given the 1 Depoin 1 Claim 1 Paym 1 Claim 0 Serviv 2 Error 0 Poste Ref	or Remove to following infor- isit records a records the records a Adjustment re- cords ed Payments re- move all deposi- set the deposit	Deposit Immation, how would you like to proceed? ecords ecords ecords <u>st information</u> , t, recalculating payment information.			Y PCN, Claim Inform 00 \$11 Page (H4)	Action Action a or Chart Number ation Action Action 1,725 00 Edit	

# Billing: How to look up a claim in Change Healthcare RPA using the trace number

There is a possibility that a biller may need to review a claim in Change Healthcare Clearinghouse. From the clearinghouse the claim can be reviewed in more detail. This document will demonstrate how to retrieve the Clearinghouse Trace number in Choice, and view it in Change Healthcare.

1. Open the claim, Click on the drop down arrow to access the Submission History.

				Insurance - Billing (	)uery 🔅
Claim		e			X
Dpen 🝷 🖬	Save 🔹 🚱 History 📲 Payments	• 🔠 Patient •		Search for Patient	Q v 🕸
▲ Status	Claim History	Patient	Service		^
Claim	Submission History	Patient	 Location	1	Q
Status	Denied		 Rendering		Q

2. Select the date of the claim submission and locate the Trace #.

Submission List	ting for Claim		
Patient:			Submission #: 3522623
<u>07/01/2021</u>	Submission Type ClearingHouse Responsible Party Same as patient	Status Claim Passed Edits. Trace #: 1808210017 06/30/2021 07-59-20 TRADING PARTNER	6 Messages
	Payer HumanaChoice (Medicare Health	PAYER	WLEDGEMENT FROM THE

3. Right Click on the Trace #, a copy trace box will appear.

Submission Lis	ting for Claim		
Patient:			Submission #: 3522623
<u>07/01/2021</u>	Submission Type ClearingHouse Responsible Party Same as patient Payer HumanaChoice (Medicare Health	Status Claim Passed Edits. Trace #: 180821001 06/30/2021 07 TO THE PAYER, WATTING FOR ACK PAYER	6 Messages 07/01/2021 12:00AM (E A HAS FORWARDED THE CLAIN NOWEEDGEMENT FROM THE

4. Log into Change Healthcare and select Claims and Tracking, and Find Claims.

	REVENUE ADVISOR	PERFORMANCE	_	Community   Learning Center   Payer List   Need Help? HI, ( 🌤 1 New and 12 Old messages )   Default Profile   & Logout						
ACCESS	PATIENT CLAIMS ACCESS - AND TRACKING -			•	PAYMENTS AND BILLING *	REPORTING AND METRICS -	K TOOLS			
Track Claims > Find Cla	ims   Fir	SUBMIT CLAIMS		TRACK CLAIM	5		08			
Simple Search CH TRACE ID:	Patier	Review Claim Workspace Manoge Patient List		Find Claims Find Claim Bat Find WC Need Find Claims W	ches ing Attachments ith Payments	cessing Date: ious ♥ 3 ♥ D t First Name:	Go to Advanced Search ay(s)			
Billing Provider Tax ID:	Billing +	TOVIDER INFT:	Search and select Pay	my List 😈 ( 🖄 er	ayer List )					
CH Processing Status:	Payer P All	rocessing Status:	ERA Processing Status:			Claim Workflow Status: Select	v			
	Claims	s Per Page: 10 V Sort	By: Date Processed	✓ Ascending	SEARCH	CLEAR FIELDS	SAVE TO MY TASKS			

5. Paste the Trace # taken from Choice into the CH Trace ID field and select Search.

Irack Claims > Find Ck		aim Batches	FIND WC NE	eaing Attac	nments   Find	ciaims w	ith Payments			0
Simple Search									Go to Advar	nced Search
CH TRACE ID:	59		Accour	it:			CHI	Processing Date: evious 🗸 🛛 3 💊	Day(s) 🗸	
Insured ID:	Patient Acc	ount #:	Patient	Last Name:			Pati	ent First Name:		
Billing Provider Tax ID:	Billing Provi	der NPI:	Payer N Search	ame or ID:	My List 😧 ( Po	yer List )				
CH Processing Status:	Payer Proce	vssing Status:	ERA Pro	cessing Status			Clai	m Workflow Stat	us:	
	Claims Per	r Page: 10 🗸	Sort By: D	ate Processed	✓ Ascending	~	SEARCH C	EAR FIELDS	SAVE TO M	Y TASKS
Result 1 to 1 of 1.	-								Show Bulk Up	date Optio
Show All Rejection Messoger										Export -
Trace ID	Account	Site Name			Patient Name		Workflow Status	CH Status	Eligibility Status	Charge \$
Date Processed Claim Ty	pe Payer ID	BP Tax ID	BP NPI	Custom ID	Patient Acct #	DOS	Assignee	Payer Status	Remit Status	Remit \$
1?		-		and the second second	(			Rejected ①		\$ 246.0
07/04/2021 Destausia	nal SMMNO	and the second se	CRARGE COMMON			-			Not Raid	

### Billing Pro Tip: Manually Migrate Patient Balances from Old System; Creating a Balance Forward CPT

A new client will not have a patient's previous balance moved from their previous system into Choice. The balance forward can be manually created and added to the patient's balance.

1. Go to Billing > Setup Screens > Code/Fee.



2. Select New code.

Search Windows				
🚨 🇊 🖗	🌯 🔁 🖪			
✓ CPT ✓ HCPCS ×	ICD9 🗙 ICD	10 Balance forw	vard $\mathbf{x} \in \mathbf{v}$	• • • • • • • • • • • • • • • • • • •
Search Results (0	total rows)			
А Туре	▲ Code	Billing Code	Description	
No data found				

3. Select Procedure.

🕘 New	Code	X						
	and and a second data with the							
which t	Which type of code would you like to create?							
	Procedure Diagnosis	Cancel						

4. Give the Balance forward a Code name, enter the Start date, assign it a Class, and enter a Description.

Procedure Code Web	page Dialo		×
Procedure Codes	New Save Train More	New Procedure Code	Д¢
G9903			
1036F	*Code Values		^
99214	Code BF Start * 01/01/2001 🔅 🗖		
G8482	Type CPT Class Miscellaneous		
92557 92567	Description • Balance Forward	^	
4040F 92504 31505		- C	
		•	
	Fee Group		
Summary	Effective • 01/01/2001 💭 📩 -		
Code	Provider Rendering Provider	Q	

5. Under the Billing Section select Patient is Responsible for payment.

🗿 Procedure Code Web	page Dialog				×
Procedure Codes	D ^a B	ê ····		BF - Balance Forward	Рø
G9903	New Save	I rain More			
<b>1036F</b> 99214 69210 G8482	Codes Billing Revenue	BF Q	Only allow this code to be used once per day. Send only revenue code on Institutional claims.		
92557 92567 4040F 92504 31505	ASA Payment Global Period	0	I		
Summary Code Fees Billing	Туре	<ul> <li>○ Electronic ○</li> <li>✓ Patient is response</li> </ul>	Paper		

### Billing Pro Tip: Manually Migrate Patient Balances from Old System; Creating a Balance Forward for a Patient

A new client will not have a patient's previous balance moved from their previous system to Choice. The balance forward can be manually created and added to the patient's balance. To create a Balance Forward for a patient, you must first have the balance forward CPT code. Review the Creating a Balance Forward CPT before reviewing this document.

1. Go to Billing > Billing Query. Select the New claim option.

Billing List «	🔒 🗸 Billing
My Tasks 🌣	🔕 💋 🔚 🛨 🖄 Setup Screens 🔻 🕞 Reporting Windows 💌 🕚
Communication (5) Health Exchange (0)	
Results (0)	Patient     Arrow Patient     Missing Signature
SOAP Notes (40) eDocuments (0) Prescription (3)	Chart # EOB ID Einst Name
Reminder (0)	{{More}}
♥ Patient Portal (0) ∰ Fax (5)	Guarantor  Missing Guarantor
NYSED (0)	First Name Last Name {{More}}
Insurance Authorizations	Payer/Insurance     Missing Insurance
Billing Query Claim Submission	Fin. Class

2. Search for and select the patient.

4	3	Patient Sea	arch Webpage Dialog									
20	ist ca 🗙 🔍 🗸 📄 🚰 🔆 🔹 🎯 👻 🔽 🐨 🔽 🔽 🗸 Include Inactive Pati											
	5	earch Res	ults (2 total rows)									
		Chart	▲ Name	Primary Type	Primary ID	DOB	Age	Gender				
	1	9342	T3st, Carole			01/01/2001	20y	Female	(86			
	2	9523	T3st, Casey			08/20/1991	29y	Female				

3. A new Claim screen should appear. Enter the Service Provider and Location.

New Claim for C	arole T3st 01/01/2001 (20y)												X
Dpen 🝷 🖡	Save 🔹 🚱 History 🔹 🚉 Pay	ments 👻 🚨	Patient 🔻								Search for Pat	ient 🔍 🗸	愈
▲ Status			Patient					S	e <b>rvice (2)</b>				
Claim	New 🝷		Patient	9342 - Carole T3st 👻					Location Service Location				
Status	Ready to Send Primary, Electronic	~		1250 Trailside Ct. :.Im.	Imkimkim	kl Win	ter G		Rendering	Rendering Pi	rovider	Q	
Substatus		~	Pat. Location			1.1	Referring			Q			
Level	Primary V Billing Electr	onic 🗸	Pat. Provider					1	Referred	\$			
Туре	Medical	~	Resp. Party	T3st, Tom (Cookie)			Q		☆ Other Pro	viders			
Owner	Smith, Staci	Q	Primary	(1) BCBS - Capital Bl	ue		Q		Alternate	Alternate Provider			
837	Professional   Institutional		Secondary	(2) Self Pay				Supervising	Supervising Provider				
			Tertiary	Tertiary Insurance					Ordering	Ordering Provider			
			Override Insurance				Attending	Attending Provider					
									Purchasing	Purchasing P	Provider	Q	
▲ Procedure	s and Diagnoses (1)												
# Service Date Deservice			Procedu	re Amount		Modi	fiers			Diag	nosis »		
" Fro	m To Flocedule	P03	Units Charge	e Amount	1	2	3	4	1	2	3	4	
1 06/07/2021 😔 06/07/2021 😒			\$0.00										
Add New	ltem					T	otal:	\$0.00	Pay/Adj: \$	0.00 Balanc	e:\$0.00 Rec	eipts: \$0.00	

4. Enter the Date of Service, the Procedure code for Balance Forward, the Charge amount and Claim status set to Ready to Send, Statement. The Date of service can be any date prior to the date of entry. The date can be the date of Go live, the date of the last patient payment in the old system, or the date of the last Visit in the old system. Remember the date that is selected can affect Billing Reports.

? Claim #269	64 for Carole T3st 01/0	01/2001 (20	y)										
Dpen -	🖬 Save 🝷 🚱 Histo	ory 🔹 🚉	Payments 🔹 🎚	Patient 🔻								Search for Pat	ient 🔍 🗸 1
▲ Status				Patient						Service			
Claim	26964 🝷			Patient	9342 - Carol	le T3st 👻				Location		-	Q
Status	Ready to Send, St	tatement	~		(LEL) 1250 Trailsio	te Ct. : Im Ir	nkimkim	kl Winte	r G	Rendering			Q
Substat	us		~	Pat. Locatio	n Patient Loc	ation		C	ξ	Referring	i	ł	Q
Level	Statement 🗸	Billing	Electronic 🖌	Pat. Provide	Patient Pro	vider		C	λ,			Referred	0
Туре	Medical		~	Resp. Party	T3st, Tom	(Cookie)		C	λ,		oviders		
Owner	Smith, Staci		Q	Primary	(1) BCBS -	Capital Blu	e	C	Z,	Alternate	Alternate Pro	vider	Q
837	Professional	) Institutiona	al	Secondary	(2) Self Pay	/		C	Z,	Supervising	Supervising I	Provider	Q
				Tertiary	Tertiary Ins	urance		C	Z,	Ordering	Ordering Pro	vider	Q
				Override	e Insurance		😰 Auti	norizatio	n	Attending	Attending Pro	ovider	Q
										Purchasing	Purchasing F	Provider	Q
▲ Procedui	es and Diagnoses	(1)											
#	Service Date	Proced	ure POS	Procee	lure Amount			Modifi	ers		Diag	nosis »	
1 05/28	2021 😂 05/28/2021	C BF		Units Char	ge 150.00	Amount		2	3	4 1	2	3	4
							1						
+ Add Ne	w Item							Total:	\$0.00	Pay/Adj: \$0.0	0 Balance: \$	0.00 Receip	ts: \$0.00 -

5. Click Save.

### **Billing: Eligibility**

#### How to Run Real time Eligibility and Batch Eligibility:

Eligibility in our system can be ran from the schedule or the patient set up. Eligibility can also be set up to run at night.

#### Batch Eligibility set up:

Navigate to the Eligibility MyTask



Click on Eligibility:

The work queue will open to the right.

Navigate to the upper right and click on the purple gear.



Choose set up:



Set the parameters for Batch eligibility to run. Choose pulling days, Coverage, NPI, Pulling types, and appointments for batch to run.



Running Eligibility real time from patient set up.

Go to the patient set up:



Click on More:



Click on Eligibility



Double Click on the Carrier you wish to run

🖉 Patient Eligibility Webpage Dialog							×
пен 🙊 📆 🚱			Test, Chandler D. (Ch	nandler)	Born 02-Nor	v-1997 (23y)	Gender Male
# Carrier Member	🕡 Eligibili	ity Request		×		Relation.	Active
1 AARP Medicare Supplement 6541616	AARP Medi	care Supplement (87366) Cove	rage #1	ler D.	(Chandler)	Self	Yes
	Service	08/27/2021 😂 💳					
	Provider	Adams ARNP, Blaire	~				~
	Coverage	Individual	~				
a	Benefit	Health Benefit Plan Coverage (3	30) 🗸		U On	ily Display Active	e Insurances
	Edit	Subscriber	Dependent				
1	Member ID	65416161+61	]				
N	First Name	Chandler					
12	Last Name	Test					
	Birth Date	11/02/1997 😂 💳					
*	SSN						
1							
4							

Click ok to run Eligibility

١	i Eligibili	ty Request		X
61	AARP Medie	care Supplement (87366) Cover	age #1	
	Service	08/27/2021 🔄 🥅		
	Provider	Adams ARNP, Blaire	,	~
	Coverage	Individual	•	~
	Benefit	Health Benefit Plan Coverage (3	0)	~
	Edit	Subscriber	Dependent	-
	Member ID	65416161+61		
	First Name	Chandler		
	Last Name	Test		
	Birth Date	11/02/1997 😂 💳		
	SSN			
	Display More	Eligibility Options	OK Con	ool
			Can	

View the insurance breakdown.

Note you will want to click on services to see copay.

You can also click on the PDF to get the full breakdown.

#### From the iScheduler:

Hover over the appointment you may run eligibility by right click or left click over the appointment.

Right click and follow steps above:



Left Click and follow steps above:

### Billing: How to Run a Statement Report

How to find the statement report for enhanced delivery payments. The Statement Electronic Payments screen is found inside the Deposits screen

Workflow:

1. Go to the billing portal



2. Click on deposits



3. Click on More



4. Click on deposit Reconciliation

	4
Change Display Settings	
	=
Deposit Reconciliation	_
Deposit Reporting	
Statement ePayments	

5. Search for deposit type statement



6. Click Search



7. Then you can export or print to pdf.



### **Billing: Collection Process with Data Media**

Currently the collection process within iSalus is manual. Below is an outline of the statements and when letters versus statements are sent via Data Media. Note that this could change depending on your preference of settings

within the statement set up. Many practices have created status and sub status to track where statements are in the collection process. You can create several sub statuses to follow. Some examples are collection, pending collection, sent to collections. Also some use 1st letter, 2nd letter, 3rd letter, and final notice.

Statements go out as follows:

1st Statement

2nd Statement

_

3rd - PAST DUE notice

4th -Past due notice (no statement)

5th -Past due notice (no statement)

6th- FINAL NOTICE (collection Letter)-no statement

Final Notice letters will continue to go out after Final Notice, until we manually change status to Collection.

		_	Cycles				_
<ul> <li>Balance Forward</li> </ul>		Statement Monitoring	Letter	Day of Month	Count	Actions	4
Auto-Send State	nent Cycle Batches	6	A-Z	First Day of Month	948	X Delete / Edit	_
Minimum Days from I	ast Statement	30	* - 2	Wissing Res	porisible Faity	Count	-
Min. Threshold	\$0.01						_
Auto-Send Warn.		*					
Envelope		*					
Processor Is	alus	~					
2. AR 31-60 Days	Your balance is	s currently 31 - 60 days old.		42			
3. AR 61-90 Davs	Your balance is	s currently 61-90 days old.					
4. AR 91-120 Days	Your balance is	s currently 120 days old.					
5. AR 121-150 Days	Your balance is	s currently 150 days old.					
	Your balance is	s currently over 150 days out					
<ol> <li>AR &gt; 150 Days</li> </ol>	el () N/A () 1	○ 2 ● 3 ○ 4 ○ 5 ○ 6					
<ol> <li>AR &gt; 150 Days</li> <li>Past Due Notice Leve</li> </ol>		e all details					
<ol> <li>AR &gt; 150 Days</li> <li>Past Due Notice Leve</li> <li>✓ Past Due St</li> </ol>	atement will include						
<ul> <li>AR &gt; 150 Days</li> <li>Past Due Notice Leve</li> <li>Past Due St</li> <li>Final Notice Level</li> </ul>	atement will include	○ 2 ○ 3 ○ 4 ○ 5 ● 6					

Whenever you process your statements: Practice preference

Change Claims sub status as follows on 15th of each month prior to sending out batch:

For Account balances under \$50.00 (you decide the threshold) :

- 1. (Go to Statements, statements
- 2. ready to send,
  - Show Warnings Only
- Unclick show warnings only, Resp. Pty.
   export to excel, by navigating to the purple gear and clicking print.
- Ready to Send Security Screen Company U Print Audit M Refresh Close
  - 1. filter by level 4 and balances. Print it (export to excel for a working report) .
  - 1. Then go to Billing Query using search criteria by account to make adjustments on balances under \$50.00) Once all of this done account should show as follows:
  - 1. After 3rd statement is sent-Now Level 4, "Past Due"
  - Adjust off account balance "Bad Debt Adjustment", Create Pop-up Alert and change account status to "Collection"
  - 3. Level: Statement

Once all of this is done account should show as follows:

- 1. After 6th statement is sent, "Final Notice"
- 2. Status: Statement Sent
- 3. Substatus: Collection Letter Sent
- 4. Level: Statement.

#### Quarterly-(In addition to Monthly steps) Every Mar/June/Sept/Dec

- 1. Go to Ready to Send, select level 6+, export and print.
- 2. Go to Billing Query, Make Adjustments on any that are UNDER \$50.00 as BD Adjustment. Create a Popup alert and change account status to Collection. (These would be if any were previously missed at Level 4)
- 3. Using Billing query search Criteria, search all account with substatus of "**Collection Letter Sent**", update substatus to "**Pending Dr. Review**"

- 2. All Accounts that are making payments status should be as follows:
- 3. Status-Sent Statement
- 4. Level-Statement
- 5. Substatus-Payment Plan
- 6. These accounts will need to be reviewed quarterly as well to make sure payments are being made. If no payment in last 45 days, phone call to patient. Update status back to **Pending Dr. Review to** include on collection review report.
- 7.
- 8. 9. Accounts with NO payments within last 30 days- Change Substatus to "Pending Dr. Review"
- 9.
- 10. 10. Go back to Billing Query search criteria, search all accounts with substatus of **"Pending Dr. Review".** Export this to excel, sort/filter by Rendering Provider. This will be their collection review report.

11. Print Collection Review report and give to Physician for review. Send Office communication to Nicole that Reports were given to Physicians.

Once report is returned by Physician, Make adjustments according to Physician response as either BAD debt W/O or collections. Add Alert popup, accordingly.

- 1. Go to billing Query and pull a pending collection report.
- 2. Change account Status to Collection.

### **Billing: Missing Refunds**

FAQ: How do I remove items from the Missing Refund report?

1. If assigning credits from the **Refund** Report, double-click on the claim number with the Missing **Refund** to open the Patient Transaction History. If not, skip to step 2.

2. Open the Patient Transaction History from whatever screen you are in.

3. In the Patient Transaction History window right click on the payment line creating the credit and select Credits.

4. In the Credit Entry window you will get a pop-up asking if you would like to create a credit, click Yes.

5. In the Credit Entry window, in the **Refund** To drop down select the **refund**ee you would like the credit to be applied to (if different than what has defaulted), then confirm the payment affected, and set the Level to the appropriate one to match the **refund**ee.

6. Click OK

### **Billing: Moving Credits**

FAQ: How do I move a credit from one claim to another claim?

#### Step 1:

- 1. Pull up the patient's history.
- 2. Go to the claim which has the credit
- 3. Right click and select Add Payment
- 4. Enter a Deposit Date (usually today's date) and a Paid By of Responsible Party
- 5. SKIP THE PAYMENT LINE ENTIRELY
- 6. On the Adjustment line, enter a POSITIVE amount equal to the credit being moved
- 7. Select the Adjustment Type Moved Payment
- 8. Click Post
- 9. Close the window to go back to the patient history

#### Step 2:

- 1. Go to the claim where you would like to apply the credit
- 2. Right click and select Add Payment
- 3. Enter a Deposit Date (usually today's date) and a Paid By of Responsible Party
- 4. SKIP THE PAYMENT LINE ENTIRELY
- 5. On the Adjustment line, enter a NEGATIVE amount equal to the credit being moved
- 6. Select the Adjustment Type Moved Payment
- 7. Click Post
- 8. Close the window to go back to the patient history

### Billing: Apply Refund to a Claim

FAQ: How do I apply a refund to a patient's claim?

- 1. Pull up the patient's history.
- 2. Go to the claim which has the balance being refunded.
- 3. Right click and select Add Payment
- 4. Enter a Deposit Date (usually the check date) and a Paid By of the Refundee
- 5. SKIP THE PAYMENT LINE ENTIRELY
- 6. On the Adjustment line, enter a POSITIVE amount; should be the amount you are refunding
- 7. Select the appropriate Adjustment Type: either Refund to Patient or Refund to Insurance
- 8. Click Post
- 9. Repeat for each procedure line as needed

### **Billing: Refunds Report**

#### **Refund Reports**

Within OfficeEMR[™] there may be a time when a claim will be over paid either by the patient or by the payer. In some cases a refund may be required to be done to either party. This is a relatively simple process and can be completed by following the below steps.

1. In the Billing portal click on Open Reporting Windows icon in the toolbar. Click on Refunds. You can view all claims that have credits by running the Refund Report.



2. In the Report Search window click Launch Report.

Category BillingMD - Claim		$\sim$	Report Refund	~
Patient				
Last Name			Chart #	to
First Name			Balance	to
Claim-				
Place Of Service Eq	ual 🖲 Not Equal			~
Date of Service	to		Code Range	to
Post Date	to		Payer	
Payment/Receipt				And O
Deposit Date	to		Payment Type	\ \
Post Date	to		Adjustment Type	N 100
Provider				
Last Name/Doctor #			Group	
First Name				
Appointment				
Date	to		Appointment Status	×
Post Date	to		Resource	

The Refund Report is divided into four statuses.

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- 1. *Patient/Responsible Party Refundee:* This refund status means a credit has been assigned to be due to the patient/responsible party.
- 2. *Payer Refundee:* This refund status means a credit has been assigned to be due to the payer.
- 3. *Missing Refunds:* This refund status means a credit has not been assigned to be due to a patient/responsible party nor a payer. (Credit needs to be created and assigned.)

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4. *Refund Errors:* This refund status is caused by moving a credit without adjusting the credit on the Credit Entry window.

North East Medical Associates Refund         Refundee         Claim # DOS Patient Refund         Refundee         Claim # DOS         Patient Reductal Associates Singson, Homer         Stoiz, Kim       Claim # DOS       Patient       Rendering Provider         28.22, Kim       Claim # DOS       Patient (325.00)       Harrgan, Caswall MD         9841 - Hall, Teresa (Patient) (325.00)       28221 (11/42021 2949) - Hall, Teresa (Patient) (325.00)       Collins, Ann MD         78.97       Codeden Rule Insurance Company (3467)       Sinopan, Homer (Patient) (3100)       Collins, Ann MD         9863 - Test, Inna (Patient) (327075)       28242 (07/01/2009 9347 - Stot, Kim       Webster, Thomas MD         9863 - Test, Inna (Patient) (327075)       28232 (11/9/2012 9350 - Test, Annetile       Annetion Tomas MD         9863 - Test, Inna (Patient) (327075)       28342 (07/01/2019 9363 - Test, Inna       Betza, Robert MD         28963 - Test, Inna (Patient) (32700)       28343 (11/9/2010 9363 - Test, Inna       Betza, Robert MD         28963 - Test, Inna (Patient) (32709 (9375) - Case, Jim J       Total Refun         28963 - Test, Inna (Patient) (32707 9)       28343 (11/9/2010 9333 - Case, Jim J       Total Refun         28963 - Test, Inna (Patient) (32709)       28353 (11/9/2010 9335 - Case, Jim J			Refund	MD Everywhere Fa	e 1 of 3	Pag	
Patient/Responsible Party       Refunde         Case, Mary, Hain, Teresa       Ciaim #       DOS       Patient       Rendering Provider         Studz, Kim       Studz, Kim       Studz, Kim       Case, Mary (Responsible Party) (S55 00)       Case, Mary (Responsible Party) (S55 00)         Studz, Kim       Test, Annette       Test, Annette       Calim, #       DOS       Patient (National)         Studz, Kim       Test, Annette       Test, Margon, Casewall MD       9491 - Hail, Teresa       Collins, Ann MD         Studz, Kim       Test, Margon, Casewall MD       9406 - Ott, Jonathan (Patient) \$10.00       Test, Margon, Casewall MD         Studge Stud		8	dical Associates	North East Me			
Case, Mary         Refunde         Patient         Rendering Provider           Tail, resa         Claim #         DOS         Patient         Rendering Provider           Simpson, Homer         Siloz, Kim         26373         11/13/2009         9379 - Case, Jim Jr.         Harrigan, Caswall MD           Siloz, Kim         26273         11/13/2009         9379 - Case, Jim Jr.         Harrigan, Caswall MD           Siloz, Kim         26221         11/14/2012         9491 - Hail, Teresa         Collins, Ann MD           Silos, Kim         26734         105/12/2006         9346 - Simpson, Homer (Tasking) \$9400         Collins, Ann MD           Side 7)         Silos Kim (Patients) \$9400         2674         05/12/2006         9347 - Silos (Silos)         Collins, Ann MD           Side 7)         Silos Kim (Patients) \$930 - Test, Annette         Armstrong, Thomas DD PC         2642         07/31/2009         9340 - Singson, Homer (Tasking) \$930 - Test, Annette         Armstrong, Thomas DD PC           Side 7)         Silos Filos         Collins, Ann MD         2845 - Silos \$97/2019         9380 - Test, Annette To           Side 7)         Silos Filos Filos \$937 - Case, Jim Jr         Collins, Ann MD         2847         Silos Filos \$937 - Case, Jim Jr         Collins, Ann MD         2845 - Gilos \$11/20209         9350 - Test, Annette         Armstr							
Claim #       DOS       Patient       Rendering Provider         Dit Jonahan       Singson, Homer       Stat.						Defundee	
Claim #       DOS       Patient       Kentering         Sets       Annetic       Sets       Annetic         est       Annetic       Sets       Annetic         est       Annetic       Sets       Case, Mary (Responsible Parky) (S25.00)       Colins, Ann MD         2847       Situl Fast       Sets       Colins, Ann MD       Sets         Sets       Annetic       Sets       Colins, Ann MD       Sets         Sets       Mark Treeso (Patient) (S25.00)       Sets       Colins, Ann MD         Sets       Sets       Sets       Sets       Colins, Ann MD         Sets       Sets       Sets       Sets       Sets       Sets       Sets         Sets       Sets       Sets       Sets       Sets       Sets       Sets       Sets       Sets       Sets       Sets       Sets       Sets       Sets       Sets       Sets       Sets       Sets       Sets       Sets       Sets       Sets       Sets       Sets       Sets       Sets       Sets       Sets       Sets       Sets       Sets       Sets       Sets       Sets       Sets       Sets       Sets       Sets       Sets       Sets       Sets       Sets       S	Amount	na Drouidor	Dondori	Dationt	DOS	Claim #	
iii. Johandanian       Big 307.3 * 97.113/2009 * 89.39 • 0.000, Jun Jr       Harrigan, Caswall MD         bolz, Kim       Big 31 * 113/2009 * 89.100, Jun Jr       Harrigan, Caswall MD         set, Annette       Big 31 * 113/2009 * 89.100, Jun Jr       Harrigan, Caswall MD         set, Annette       Big 31 * 113/2009 * 89.100, Jun Jr       Golins, Ann MD         set, Annette       Set 111/14/2012 * 98.00, Jun Jr       Harrigan, Caswall MD         set, Annette       Set 111/14/2012 * 98.00, Jun Jr       Harrigan, Caswall MD         set, Annette       Set 111/14/2012 * 98.00, Jun Jr       Harrigan, Caswall MD         set, Annette       Set 111/14/2012 * 98.00, Jun Jr       Harrigan, Caswall MD         set 111/14/2012 * 111/14/2012 * 98.00, Jun Jr       Harrigan, Caswall MD       Big 31.5 * Set 111/14/2012 * 98.00, Jun Jr         set 111/14/2012 * 111/14/2012 * 98.00, Jun Jr       Harrigan, Caswall MD       Big 31.5 * Set 111/14/2012 * 98.00, Jun Jr         set 111/14/2012 * 111/14/2012 * 98.00, Jun Jr       Harrigan, Caswall MD       Big 31.5 * Set 111/14/2012 * 98.00, Jun Jr         set 111/14/2012 * 98.00, Jun Jr       Set 111/14/2012 * 98.00, Jun Jr       Harrigan, Caswall MD         93.41       Set 111/14/2012 * 98.00, Jun Jr       Collins, Ann MD         93.42       Set 111/14/2012 * 98.00, Jun Jr       Collins, Ann MD         93.42       Set 111/14/2012 * 98.00, Ju	Amount	ing Frovider	Kenden	ratent (\$25.00)	DUS Desnonsible D	Case Many (	
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34. Analte       32221 11/14/2012 9491 - Hall, Teresa       Collins, Ann MD         9406 - Ott, Jonathan (Patient) \$10.00       27022 04/07/2010 9406 - Ott, Jonathan (Patient) \$10.00       Smith, Troy MD         9366 - Ditta Insurance Company       26794 05/21/2008 9346 - Simpson, Homer       Harrigan, Caswall MD         9367 - Stock, Kim (Patient) \$10.00       26842 07/31/2009 9347 - Stock, Kim (Patient) \$10.00       Collins, Ann MD         9367 - Stock, Kim (Patient) \$10.00       26842 07/31/2019 9530 - Test, Annette       Collins, Ann MD         9368 - Simpson, Homer       Harrigan, Caswall MD       26842 07/31/2019 9530 - Test, Annette       Collins, Ann MD         9368 - Test, Ima (Patient) \$10.00       26223 11/15/2012 9550 - Test, Annette       Collins, Ann MD       26845 07/25/2019 9530 - Test, Annette       Collins, Ann MD         9363 - Test, Ima (Patient) \$10/2019 9333 - Test, Ina       Belca, Robert MD       26858 02/24/2019 9330 - Caser, Jill       Total Refund         9369 - Test, Optimic (Patient) \$10/2019 9332 - Test, Ellen       Belca, Robert MD       36491 - Couplin surance Company (Vryor)       Total Refund         26958 02/24/2019 9330 - Caser, Jill       Swaim, J MD       Total Refund       Swaim, J MD       Total Refund         9406 - Cott Jourdan & Galdanae Company (Vryor)       Zoll Stace (Vryor)       Swaim, J MD       Swaim, J MD       Swaim (Stace Optien)         26951 10/16/2019 9332 - Test, Ellen </td <td></td> <td></td> <td></td> <td>(\$25.00)</td> <td>eresa (Patient</td> <td>9491 - Hall, 1</td>				(\$25.00)	eresa (Patient	9491 - Hall, 1	
94. Aniette 94. Aniette 94. Aniette 94. Cott. Jonathan (Patient) \$10.00 2022 04/07/2019 9406 - Ott. Jonathan 9346 - Simpson, Homer (Patient) \$10.00 20346 - Simpson, Homer (Patient) \$10.00 20347 - Stotz, Kim (Patient) \$0.00 20342 07/31/2009 9347 - Stotz, Kim 9407 - Stotz, Kim (Patient) \$10.00 20342 07/31/2012 9550 - Test, Annette 20353 - Test, Manette (Patient) (\$17.00) 20353 - Test, Annette 20353 - Test, Manette (Patient) (\$17.00) 20353 - Test, Annette 20353 - Test, Manette 20353 - Test, Manette 20355 0.2724/2010 9333 - Test, Ima 20356 0.2724/2010 9335 - Test, Annette 20358 0.2724/2010 9335 - Test, Ima 20358 0.2724/2010 9335 - Test, Ima 20358 0.2724/2010 9335 - Caser, Jill 20358 0.2724/2010 9339 - Caser, Jill 20358 0.00 20370 11/13/2009 9337 - Case, Jim Jr 20300 (\$11.0300) 20371 11/3/2009 9337 - Case, Jim Jr 20300 (\$12.1000 9337 - Caser, Jill 20310 0.1721010 9332 - Test, Ima 20350 0.00 20371 11/3/2009 9337 - Case, Jim Jr 20300 0.00 (\$1.000 20371 11/3/2009 9337 - Case, Jim Jr 20300 0.00 (\$1.000 20371 11/3/2009 9337 - Case, Jim Jr 20300 0.00 (\$1.000 20371 10/3/2009 9337 - Case, Jim Jr 20300 0.00 (\$1.000 20371 10/3/2000 9337 - Case, Jim Jr 20300 0.00 (\$2.000 20371 10/3/2001 9332 - Test, Ellen 20370 10.00 (\$2.000 20370 0.00 (\$2.000 20370 0.00 (\$2.000 20370 0.00 (\$2.000 20370 0.00 (\$2.000 20320 0.00 (\$2.000 20320 0.00 (\$3.000 20320 0.00 (\$3.000 20320 0.00 (\$3.000 20320 0.00 (\$3.000 20320 0.00 (\$3.000 20320 0.00 (\$3.000 20350 0.00 (\$3.000 20350 0.00 (\$3.000 2035	(\$25.		Collins, Ann MD	9491 - Hall, Teresa	11/14/2012	28221	
st, ima yer yer yer yer yer yer yer yer				nt) \$10.00	nathan (Patier	9406 - Ott, Jo	
93/40 - Single Insurance Company 3457)       93/40 - Single Insurance Service Center, Inc. 3937 - Stoiz, Kmir (Patient) \$0.00       93/43 - Single Insurance Service Center, Inc. 3937 - Stoiz, Kmir (Patient) \$0.00         38aing Refunds       Webster, Thomas MD         9500 - Test, Annette (Patient) \$0.00       26/42 07/31/2010 93/34 - Stoiz, Kim       Webster, Thomas MD         9500 - Test, Annette (Patient) \$2/2012 9550 - Test, Annette       Annetsong, Tomas DDS PC         7000 Errors       Test, Inma (Patient) \$2/2013 93/33 - Test, Inma       Belza, Robert MD         93643 - Group Insurance Service Center, Inc. (Payer)       26/43 07/31/2010 93/33 - Test, Lina       Belza, Robert MD         93643 - Group Insurance Service Center, Inc. (Payer)       26/43 0/31/2010 93/33 - Test, Lina       Belza, Robert MD         93643 - Group Insurance Service Center, Inc. (Payer)       26/43 0/31/2010 93/33 - Test, Lina       Belza, Robert MD         9445 - Group Insurance Service Center, Inc. (Payer)       26/43 0/31/2010 93/33 - Test, Lina       Strain #         9445 - Group Insurance Service Center, Inc. (Payer)       26/43 0/31/2010 93/37 - Case, Jim Jr       Stoid (Sill 000)         26/47 - 08/14/2009 93/79 - Case, Jim Jr       Stoid (Sill 000)       26/43 0/41/2019 93/27 - Case, Jim Jr       Stoid (Sill 000)         26/47 - 08/14/2009 93/79 - Case, Jim Jr       Stoid (Sill 000)       26/43 0/41/2019 93/27 - Case, Jim Jr       Stoid (Sill 000)         26/47 - 08/14/2009	(\$10.		Smith, Troy MD	9406 - Ott, Jonathan	04/07/2010	2/022 0246 Simo	
Open Haurance Company (497)         Open Haurance Service Center, Inc. (491)         Open Haurance Center, Inc. (491)         Open Haurance Center, Inc. (491)         Open Haurance Center, Inc. (491)         Open Haurance Center, Inc. (493)         Descent Haurance Center, Inc. (493)         Descent Haurance Collins, Ann MD         Descent Haurance Test, Annette Ta (493)           3937 - Test, Ima (Patient) (527)(201)         9363 - Test, Ima (Patient) (527)(201)         Belza, Robert MD         Belza, Robert MD           3948 - 720/2010         9350 - Case, Jimi (Carry)         Belza, Robert MD         Belza, Robert MD           3949 - 720/2010         9350 - Case, Jimi (Carry)         Belza, Robert MD         Belza, Robert MD           3949 - 720/2010         9350 - Case, Jimi (Carry)         Belza, Robert MD         Belza, Robert MD           3949 - 720/2010         9350 - Case, Jimi Jr         Total Refurn           3949 - 720/2010         9350 - Case, Jimi Jr         Strain matmotice           26678 10/17/2010         9379 - Case, Jimi Jr         Strain matmotice           26687 10/17/2010         9353 - Test, Ima         Strain matmotice           26687 10/17/2010         9353 - Care, Jimi Jr         Str	(\$25)	IMD	Harrigan Caswal	9346 - Simpson Homer	05/21/2008	9340 - Simps 26794	
28842       07/31/2009       9347       - Stolz, Kim       Webster, Thomas MD         9550       - Test, Annette (Patient) (\$17.00)       Collins, Ann MD       24225       11/15/2012       9550       - Test, Annette To         3930       Refunds       - Test, Annette (Patient) (\$279.75)       Test, Annette To       - Test, Annette To         2933       - Test, Ima (Patient) (\$272.75)       East, Robert MD       - Stolz, Robert MD         39491       - Group Insurance Service Center, Inc, (Payer)       East, Robert MD       - Stolz, Robert MD         39491       - Group Insurance Service Center, Inc, (Payer)       - Stolz, Robert MD       - Stolz, Robert MD         39491       - Group Insurance Service Center, Inc, (Payer)       - Stolz, Robert MD       - Stolz, Robert MD         39491       - Group Insurance Service Center, Inc, (Payer)       - Stolz, Robert MD       - Stolz, Robert MD         39491       - Group Insurance Service Center, Inc, (Payer)       - Stolz, Robert MD       - Stolz, Robert MD         26958       0/21/2010       9383       - Case, Jim       - Stolz, Robert MD       - Stolz, Robert MD         26847       0/14/2009       9379       - Case, Jim       - Stolz, Robert MD       - Stolz, Robert MD         26847       0/11/2009       9379       - Case, Jim Jr       - Stolz, Robe	(020.		Tungun, Ouswa	50.00	Kim (Patient) \$	9347 - Stolz.	
9550. Test, Annette (Patient) (\$17.00)         ssing Refunds         sting Refunds         sting Refunds         933.3. Test, Ima (Patient) (\$279.75)         27333 11/02/2010 9363. Test, Annette         27333 11/02/2010 9363. Test, Ima         Betza, Robert MD         3849: - Consent rule imanance company (rayer)         27133 06/17/2010 9362. Test, Ima       Betza, Robert MD         3849: - Consent rule imanance company (rayer)       21137 06/17/2010 9362. Test, Ima         27133 06/17/2010 9362. Test, Ima       Betza, Robert MD         3849: - Consent rule imanance company (rayer)       21137 06/17/2010 9362. Test, Ima         2655 02/24/2010 9339. Caser, Jill       Swaim, J MD         Total Refun         Total Refund         Total Balance         26847 08/14/2009 9379 - Case, Jim J       570.00 (\$11,30.00)         Societates mal         Societates (\$10,00)         Case: Jim J         Societates (\$11,000)         26847 08/14/2009 9379 - Case, Jim J         Societates (\$22,000)         26847 08/14/2009 9379 - Case, Jim J         26847 08/14/2019 9383 - Cest, Em J         2000 (\$12,000 9379 - Case, Jim J	(\$200.	MD	Webster, Thomas	9347 - Stolz, Kim	07/31/2009	26842	
Basing Refunds         Collins, Ann MD           1000 Errors         28495 07/25/2013 9550-Test, Annette         Collins, Ann MD           28495 07/25/2013 9550-Test, Annette         Armstrong, Thomas DDS PC         Test, Annette To           9363-Test, Ima (Patient) (\$279.75)         Belza, Robert MD         27137 06/17/2010 9362-Test, Ima         Belza, Robert MD           29407 - Odden rule insurance Company (reaver)         27137 06/17/2010 9392-Test, Ellen         Belza, Robert MD           29409 - Odden rule insurance Service Center, Inc. (Payer)         26958 0/224/2010 9392 - Test, Jill         Swaim, J MD           26958 0/224/2010 9392 - Test, Jill         Swaim, J MD         Total Refun           26958 0/224/2010 9392 - Test, Jill         Swaim, J MD         Total Refu           26958 0/224/2010 9392 - Test, Jill         Swaim, J MD         Total Refu           26958 0/224/2010 9379 - Case, Jim Jr         570.00 (\$1130.00)         Case.00)           26857 12/17/2009 9379 - Case, Jim Jr         570.00 (\$1130.00)         Sca6.00)           268587 12/17/2010 9392 - Test, Ellen         \$195.00 (\$19.75)         Sca6.00)           268587 12/17/2010 9322 - Test, Ellen         \$195.00 (\$19.75)         Sca6.00)           27137 06/17/2010 9323 - Care, Jim Jr         \$223.00 (\$45.00)         Sca6.00)           27137 06/17/2010 9323 - Care, Ellen         \$24.50 (\$50.00)				nt) (\$17.00)	nnette (Patier	9550 - Test,	
28495       07/25/2013       9550 - Test, Annetite       Amstrong, Thomas DDS PC Test, Annetite To 27133         9363       Test, Ima (Patient) (\$279,75)       Belza, Robert MD         27133       106/117/2010       9392 - Test, Elien       Belza, Robert MD         36491       - Group Insurance Service Center, Inc. (Payer)       26958       02/24/2010         26958       02/24/2010       9380 - Caser, Jill       Swaim, J MD         Total Refum         Ostal Insurance Service Center, Inc. (Payer)         26958       02/24/2010       9330 - Caser, Jill       Swaim, J MD         Total Refum         Primed on 12/09/2013 12:30:49 pm (5017)         Claim #       DOS       Patient       Total       Balance       Balance         26847       08/14/2009       9379 - Case, Jim Jr       570.00       (\$1,130.00)       268:1711/13/2009       9379 - Case, Jim Jr       550.00       (\$26:00)         26847       08/14/2009       9379 - Case, Jim Jr       550.00       (\$26:00)       268:1711/13/2010       9353 - Cart, Berry       \$454.50       (\$50.00)         26912       01/19/2010       9333 - Cart, Berry       \$454.50       (\$50.00)       22137       06/44.50       22117       06/44.50 <td< td=""><td>(\$35.</td><td></td><td>Collins, Ann MD</td><td>9550 - Test, Annette</td><td>11/15/2012</td><td>28225</td></td<>	(\$35.		Collins, Ann MD	9550 - Test, Annette	11/15/2012	28225	
Claim         Past, Allectic 10           9363 - Test, Ima (Patient) (5279.75)         27333 11/02/2010         9363 - Test, Ima         Belza, Robert MD           24347 - Codeon Rule Insurance Company (1*2yer)         27137 06/17/2010         9393 - Test, Ellen         Belza, Robert MD           36491 - Group Insurance Service Center, Inc. (Payer)         28958 02/24/2010         9393 - Caser, Jill         Swaim, J MD           Total Refund           26958 02/24/2010 9390 - Caser, Jill         Swaim, J MD           Total Refund           Vertex on 12/09/2013 12/2014 9910 - Caser, Jill         Swaim meansate           North East Medical Associates Missing Refunds Report           Claim # DOS Patient Total Balance (2)           26847 08/14/2009         9379 - Case, Jim Jr         55.00 (51.130.00)           Caser, Jim Jr         55.00 (51.97.5)           26912 01/19/2010 9353 - Case, Jim Jr         55.00 (51.97.5)           26912 01/19/2010 9353 - Case, Jim Jr         55.00 (51.60.00)           27177 2009 9363 - Test, Ima         515.00 (51.60.00)           26912 01/19/2010 9353 - Case, Jim Jr         55.00 (52.00)           27107 2019 9353 - Test, Ima         515.00 (57.00)           281912 01/19/2010 9355 - Norma	(\$15.	as DDS PC	Armstrong, Thom	9550 - Test, Annette	07/25/2013	28495	
Claim       Initial (Juli2/2010       9383 - Test, Ima       Belza, Robert MD         28487 - Gooden Rule insurance Company (Payer)       21137       Belza, Robert MD         36491 - Group Insurance Service Center, Inc, (Payer)       26958       02/24/2010       9380 - Caser, Jill       Swaim, J MD         Total Refun         Permet on 12/09/2013 12:30:49 pm (EDT)       Example Total Refun         Vermet on 12/09/2013 12:30:49 pm (EDT)       Example Total Refun         Claim # DOS Patient Total Balance (Strippe Colspan)       Total Refun         28647 08/14/2009 9379 - Case, Jim Jr       S70.00 (\$1,130.00)         26847 08/14/2009 9379 - Case, Jim Jr       S70.00 (\$1,130.00)         26847 08/14/2009 9379 - Case, Jim Jr       S70.00 (\$1,130.00)         26847 08/14/2009 9379 - Case, Jim Jr       S70.00 (\$26.00)         26847 08/14/2009 9379 - Case, Jim Jr       S70.00 (\$1,130.00)         26847 08/14/2009 9379 - Case, Jim Jr       S70.00 (\$1,130.00)         26847 08/14/2019 9379 - Case, Jim Jr       S50.00 (\$26.00)         27177 07/07/07       S34.50 (\$50.00)         27177 07/07/2019 9353 - Care, Elen       S23.00 (\$45.00	(\$50.	Test, Annette Tot		270 75)	ma (Datient) /	9363 . Test	
Setter         Column Hule Insurance Company (Payer)         Betza, Robert MD           27137         06/17/2010         9392         Caser, Jill         Betza, Robert MD           36491         - Group Insurance Service Center, Inc, (Payer)         Swaim, J MD         Total Refun           26958         02/24/2010         9380 - Caser, Jill         Swaim, J MD         Total Refun           Primes on 12/09/2013 12:30:49 pm (507)         Isaus Presence           Claim #         DOS         Patient         Total Balance           26847         06/14/2009         9379 - Case, Jim Jr         \$70.00         (\$1,130.00)         26873         11/13/2009         9379 - Case, Jim Jr         \$50.00         (\$26.00)         26817         11/11/2009         9379 - Case, Jim Jr         \$50.00         (\$26.00)         26817         \$1/11/2009         9379 - Case, Jim Jr         \$50.00         (\$26.00)         26912         01/19/2010         9323 - Test, Ellen         \$94.50         (\$50.00)         26913         10/11/2019         9323 - Test, Ellen         \$94.50         (\$50.00)         27077         05/05/2010         9404         Williams, Forest         \$230.00         (\$45.00)         27137         06/17/2010         9323 - Test, Pam         \$70.00         (\$20.00) <td>(\$110</td> <td>)</td> <td>Belza, Robert MD</td> <td>9363 - Test Ima</td> <td>11/02/2010</td> <td>27333</td>	(\$110	)	Belza, Robert MD	9363 - Test Ima	11/02/2010	27333	
27137       06/17/2010       9392 - Test, Ellen       Belza, Robert MD         36491       - Group Insurance Service Center, Inc. (Payer)       Swaim, J MD         Total Refun         Swaim, J MD         Total Refun         With the second of the secon				ince Company (Payer)	en Rule Insura	36467 - GOIO	
36491 - Group Insurance Service Center, Inc. (Payer)       Swaim, J MD         Total Refun         Swaim, J MD         Total Refun         North East Medical Associates Missing Refunds Report         Claim # DOS Patient Total Balance 2         26847 08/14/2009 9379 - Case, Jim Jr       S70.00       (\$1,130.00)         26847 08/14/2009 9379 - Case, Jim Jr       S70.00       (\$1,130.00)         26847 08/14/2009 9379 - Case, Jim Jr       S50.00       (\$169.75)         26847 01/12/2019 9353 - Car, Berry       S94.50       (\$100)         26848 10/12/2019 9323 - Car, Ellen       S94.50       (\$50.00)         26918 01/21/2019 9392 - Test, Ellen       S94.50       (\$50.00)         27077 05/05/2010 9404 - Williams, Forest       \$230.00       (\$45.00)         2717 06/17/2010 9392 - Test, Ellen       S350.00       (\$230.00       (\$24.00)         27361 11/16/2010 9355 - Normal, Abbie       \$150.00       (\$24.00)       (\$22.00)       (\$22.00)       (\$22.00)       (\$22.00)       (\$22.00)       (\$22.00) <td co<="" td=""><td>(\$25.</td><td>)</td><td>Belza, Robert MD</td><td>9392 - Test, Ellen</td><td>06/17/2010</td><td>27137</td></td>	<td>(\$25.</td> <td>)</td> <td>Belza, Robert MD</td> <td>9392 - Test, Ellen</td> <td>06/17/2010</td> <td>27137</td>	(\$25.	)	Belza, Robert MD	9392 - Test, Ellen	06/17/2010	27137
Z6958       02/24/2010       9380 - Caser, Jill       Swaim, J MD         Total Refun         Primed on 12/09/2013 12:30:49 pm (EDT)       Isaue meannaire         Claim # DOS Patient Total Balance 0         26847       08/14/2009       9379 - Case, Jim Jr       S70.00       (\$1130.00)         26847       108/14/2009       9379 - Case, Jim Jr       S70.00       (\$1130.00)         26847       108/14/2009       9379 - Case, Jim Jr       S50.00       (\$26.00)         26847       10/11/2010       9353 - Care, Jim Jr       S50.00       (\$26.00)         26887       10/11/2010       9363 - Test, Ima       S195.00       (\$5169.05)         26918       01/21/2010       9392 - Test, Ellen       S24.50       (\$50.00)         27037       05/07/2010       9494 - Vest, S230.00       (\$45.00)         27137       06/17/2010       9392 - Test, Ellen       S25.00       (\$52.00)         27137       06/17/2010       9392 - Test, Ellen       S25.00       (\$52.00)         27137       06/17/2012       9515 - Test, Pam       S70.00       (\$22.00)         27979       05/07/2012       9515 - Test, Pam       S70.00       (\$22.00)       (\$22.00)       (\$22.00) <t< td=""><td></td><td></td><td></td><td>ervice Center, Inc, (Payer)</td><td>p Insurance Se</td><td>36491 - Grou</td></t<>				ervice Center, Inc, (Payer)	p Insurance Se	36491 - Grou	
Claim #         DOS         Patient         Total         Balance         F           26847         08/14/2009         9379 - Case, Jim Jr         570.00         (\$1,130.00)           26847         08/14/2009         9379 - Case, Jim Jr         570.00         (\$1,130.00)           26847         11/13/2009         9379 - Case, Jim Jr         55.00         (\$26.00)           26847         10/14/2010         9353 - Case, Jim Jr         55.00         (\$26.00)           268487         12/17/2019         9353 - Test, Ima         5195.00         (\$16.97.5)           26918         01/12/2010         9353 - Test, Ellen         \$94.50         (\$50.00)           27077         05/07/2010         9404 - Williams, Forest         \$2230.00         (\$44.01)           27077         05/07/2010         9404 - Williams, Forest         \$230.00         (\$45.00)           27374         01/2/2019         955 - Normal, Abbie         \$150.00         (\$74.01)           27914         03/2/2012         9515 - Test, Pam         \$70.00         \$20.00           28290         01/24/2013         9379 - Case, Jim Jr         \$50.00         \$52.00           28292         01/24/2013         9379 - Case, Jim Jr         \$50.00         \$52.00 <td>(\$25.</td> <td>7-1-10-6</td> <td>Swaim, J MD</td> <td>9380 - Caser, Jill</td> <td>02/24/2010</td> <td>26958</td>	(\$25.	7-1-10-6	Swaim, J MD	9380 - Caser, Jill	02/24/2010	26958	
Permete on 12004/2013 12/30/40 (1000)       Dots       Patient       Total       Balance       C         26847       08/14/2009       9379 - Case, Jim Jr       570.00       (\$1,130.00)       26607         26847       08/14/2009       9379 - Case, Jim Jr       570.00       (\$1,130.00)       26000         26847       10/11/2009       9363 - Test, Ima       5150.00       (\$260.00)         26817       2/11/2009       9363 - Test, Ima       5150.00       (\$260.00)         26818       11/12/2019       9353 - Carr, Berry       594.50       (\$50.00)         27137       06/17/2010       9392 - Test, Ellen       525.00       (\$50.00)         27137       06/17/2010       9392 - Test, Ellen       525.00       (\$50.00)         27137       06/17/2010       9392 - Test, Ellen       525.00       (\$50.00)         27137       06/17/2010       9352 - Normal, Abbie       5150.00       (\$74.01)         27140       05/07/2012       9515 - Test, Annette       510.00       (\$20.00)         27979       05/07/2012       9550 - Test, Annette       510.00       (\$20.00)         28290       01/12/2013       9379 - Case, Jim Jr       \$50.00       (\$35.00)         28200       06/13/201	(\$4/1.	Total Refund					
Claim #         DOS         Patient         Total         Balance           26847         08/14/2009         9379 - Case, Jim Jr         \$70.00         (\$1130.00)           26673         11/13/2009         9379 - Case, Jim Jr         \$5.00         (\$26.00)           26673         11/13/2009         9363 - Test, Ima         \$195.00         (\$26.00)           26673         11/12/2019         9363 - Carr, Berry         \$195.00         (\$169.75)           26912         01/12/2019         9353 - Carr, Berry         \$94.50         (\$50.00)           26913         01/21/2010         9392 - Test, Ellen         \$25.00         (\$45.00)           27137         06/17/2010         9392 - Test, Ellen         \$25.00         (\$5.00)           27361         11/16/2010         9392 - Test, Pam         \$150.00         (\$74.01)           27379         05/07/2012         9515 - Test, Pam         \$10.00         (\$52.00)           28020         06/13/2012         9550 - Test, Annette         \$10.00         (\$52.00)           28299         01/2/2013         9379 - Case, Jim Jr         \$50.00         \$35.00           28299         01/2/2013         9379 - Case, Jim Jr         \$50.00         \$35.00           28299	Page 1		Isaus Hearncare	North East Medic	2013 12:30:46 pm	Printed on 12/09	
26847       08/14/2009       9379 - Case, Jim Jr       \$70.00       (\$1.130.00)         26873       11/13/2009       9379 - Case, Jim Jr       \$55.00       (\$26.00)         26887       12/17/2009       9363 - Test, Ima       \$195.00       (\$169.75)         26912       01/19/2010       9363 - Car, Berry       \$94.50       (\$50.00)         26918       01/21/2010       9392 - Test, Ellen       \$94.50       (\$60.00)         27077       05/05/2010       9404 - Williams, Forest       \$2230.00       (\$45.00)         27137       06/17/2010       9392 - Test, Ellen       \$25.00       (\$5.00)         27137       06/17/2010       9392 - Test, Ellen       \$25.00       (\$5.00)         27137       06/17/2010       9355 - Normal, Abbie       \$150.00       (\$74.01)         27944       03/27/2012       9515 - Test, Pam       \$70.00       (\$20.00)         28020       06/13/2012       9550 - Test, Annette       \$10.00       (\$5.00)         28124       09/13/2012       9566 - Test, Troy       (\$2.00)       (\$5.00)         28299       01/24/2013       9379 - Case, Jim Jr       \$50.00       (\$35.00)         28299       01/24/2013       9369 - Poland, Kimberly       \$90.00 <t< th=""><th>Page 1</th><th></th><th>cal Associates nds Report</th><th>North East Medic Missing Refu</th><th>2013 12:30;46 pm (</th><th>Printed on 12/09</th></t<>	Page 1		cal Associates nds Report	North East Medic Missing Refu	2013 12:30;46 pm (	Printed on 12/09	
26673       11/13/2009       9379 - Case, Jim Jr       55.00       (\$26.00)         26673       12/17/2009       9363 - Carr, Berry       \$195.00       (\$169.75)         26912       01/19/2010       9353 - Carr, Berry       \$194.50       (\$50.00)         26918       01/21/2010       9392 - Test, Ellen       \$24.50       (\$60.00)         27077       05/05/2010       9404       Williams, Forest       \$230.00       (\$45.00)         27137       06/17/2010       9392 - Test, Ellen       \$25.00       (\$5.00)         27361       11/16/2010       9392 - Test, Ellen       \$25.00       (\$5.00)         27371       06/17/2012       9515 - Test, Pam       \$70.00       (\$20.00)         27979       05/07/2012       9515 - Test, Pam       \$70.00       (\$20.00)         27979       05/07/2012       9550 - Test, Annette       \$11.00       (\$5.00)         28202       06/13/2012       9565 - Test, Annette       \$10.00       (\$5.00)         28299       01/24/2013       9379 - Case, Jim Jr       \$50.00       (\$35.00)         28299       01/24/2013       9379 - Case, Jim Jr       \$50.00       (\$35.00)         28536       10/14/2013       9630 - Poland, Kimberly       \$90.00	Page 1	Balance R	cal Associates nds Report Total	North East Media Missing Refu	2013 12:30:46 pm ) DOS	Printed on 12/05	
20007         12717/2009         5030-1053, 1083         (\$195,00)         (\$195,75)           26918         01/21/2010         9353 - Cars, Berry         \$94,50         (\$50,00)           27077         05/05/2010         9404         Williams, Forest         \$230,00         (\$45,00)           27077         05/05/2010         9404         Williams, Forest         \$230,00         (\$45,00)           27137         06/17/2010         9392         Test, Ellen         \$252,00         (\$50,00)           27361         11/16/2010         9392         Test, Ellen         \$252,00         (\$74,01)           27979         05/07/2012         9515         Test, Abigail         \$14,03         (\$0,97)           28020         06/13/2012         9560         Test, Annetite         \$10,00         (\$5,00)           28299         01/24/2013         9379         Case, Jim Jr         \$50,00         (\$32,00)           28299         01/24/2013         9379         Case, Jim Jr         \$50,00         (\$32,00)           28299         01/24/2013         9379         Case, Jim Jr         \$50,00         \$35,00)           28536         10/14/2013         9630<- Poland, Kimberly	Fund ount \$0.00	Balance R (\$1,130.00)	caus reamcare cal Associates nds Report Total \$70.00	North East Medic Missing Refu Patient 9379 - Case, Jim Jr	DOS 08/14/2009	Printed on 12/05 Claim # 26847	
26918         01/21/2010         9392 - Test, Ellen         \$34.50         (\$30.00)           27077         05/05/2010         9404 - Williams, Forest         \$230.00         (\$45.00)           27137         06/17/2010         9392 - Test, Ellen         \$25.00         (\$5.00)           27137         06/17/2010         9392 - Test, Ellen         \$25.00         (\$5.00)           27137         06/17/2010         9355 - Normal, Abbie         \$15.000         (\$74.01)           27914         03/27/2012         9515 - Test, Pam         \$70.00         (\$20.00)           27979         05/07/2012         9515 - Test, Annette         \$10.00         (\$5.00)           28020         06/13/2012         9566 - Test, Annette         \$10.00         (\$5.00)           28244         09/13/2012         9566 - Test, Troy         (\$2.00)         \$25.00           28258         10/14/2013         9379 - Case, Jim Jr         \$50.00         \$35.00           28536         10/14/2013         9630 - Poland, Kimberly         \$90.00         \$20.00           28536         10/14/2013         9630 - Poland, Kimberly         \$90.00         \$20.00           28536         10/14/2013         9630 - Poland, Kimberly         \$90.00         \$20.00	Fund ount \$0.00 \$1.00 \$0.00	Balance R (\$1,130.00) (\$26.00)	cal Associates nds Report Total \$70.00 \$55.00	North East Medic Missing Refu Patient 9379 - Case, Jim Jr 9363 Teet Ima	DOS 08/14/2009 12/13/2009	Printed on 12/09 Claim # 26847 26873	
27077         05/05/2010         9404 - Williams, Forest         \$230.00         (\$45.00)           27137         06/17/2010         9392 - Test, Ellen         \$25.00         (\$5.00)           27361         11/16/2010         9355 - Normal, Abbie         \$150.00         (\$74.01)           27914         03/27/2012         9515 - Test, Pam         \$70.00         (\$20.00)           27979         05/07/2012         9533 - Distler, Abigail         \$14.03         (\$0.97)           28020         06/13/2012         9550 - Test, Amette         \$10.00         (\$5.00)           28214         09/13/2012         9566 - Test, Troy         (\$2.00)         (\$2.00)           28299         01/24/2013         9379 - Case, Jim Jr         \$50.00         (\$35.00)           28299         01/24/2013         9379 - Case, Jim Jr         \$50.00         (\$32.00)           28536         10/14/2013         9630 - Poland, Kimberly         \$90.00         \$20.00)           Pented on 1208/2013         12:30:46 pm (EDT)         Usalue Healthcare         North East Medical Associates           Refund Errors Report	Fund ount \$0.00 \$1.00 \$0.00 \$0.00	Balance R (\$1,130.00) (\$26.00) (\$169.75) (\$50.00)	cal Associates nds Report Total \$70.00 \$5.00 \$195.00 \$24.50 \$24.50	North East Media Missing Refu Patient 9379 - Case, Jim Jr 9379 - Case, Jim Jr 9353 - Care Berry	DOS 08/14/2009 11/13/2009 12/17/2009 12/17/2019	Printed on 12/09 Claim # 26847 26873 26897	
27137       06/17/2010       9392 - Test, Ellen       \$25.00       (\$5.00)         27361       11/16/2010       9355 - Normal, Abbie       \$150.00       (\$74.01)         27914       03/27/2012       \$515 - Test, Parm       \$70.00       (\$22.00)         27979       05/07/2012       \$535 - Test, Parm       \$70.00       (\$20.00)         28020       06/13/2012       \$555 - Test, Annette       \$10.00       (\$5.00)         28292       01/24/2013       9376 - Case, Jim Jr       \$50.00       (\$52.00)         28299       01/24/2013       9379 - Case, Jim Jr       \$50.00       (\$52.00)         28536       10/14/2013       9630 - Poland, Kimberly       \$90.00       (\$20.00)         Panted on 12/09/2013 12:30:46 pm (EDT)	Fund ount \$0.00 \$1.00 \$0.00 \$0.00 \$0.00 \$0.00	Balance R (\$1,130.00) (\$26.00) (\$169.75) (\$50.00) (\$60.00)	tsaus realmcare cal Associates nds Report Total \$70.00 \$5.00 \$195.00 \$94.50 \$94.50 \$94.50	North East Media Missing Refu Patient 9379 - Case, Jim Jr 9363 - Test, Ima 9353 - Carr, Berry 9392 - Test, Ellen	DOS 08/14/2009 12/17/2009 01/19/2010 01/21/2010	Printed on 12/09 Claim # 26847 26873 26887 26912 26918	
27361       11/16/2010       9355 - Normal, Abbie       \$150.00       (\$74.01)         27914       03/27/2012       9515 - Test, Pam       \$70.00       (\$20.00)         27979       05/07/2012       9533 - Distler, Abigail       \$14.03       (\$0.97)         28020       06/13/2012       9566 - Test, Annette       \$10.00       (\$5.00)         28299       01/24/2013       9379 - Case, Jim Jr       \$50.00       (\$35.00)         28299       01/24/2013       9379 - Case, Jim Jr       \$50.00       (\$35.00)         28536       10/14/2013       9379 - Case, Jim Jr       \$50.00       (\$20.00)         28536       10/14/2013       9379 - Case, Jim Jr       \$50.00       (\$20.00)         Pinted on 1209/2013       12:30:46 pm (EDT)       ISatus Heatthcare         North East Medical Associates         Refund Errors Report	Fund ount \$0.00 \$1.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00	Balance         R Δ           (\$1,130.00)         (\$26.00)           (\$516.9.75)         (\$50.00)           (\$560.00)         (\$45.00)	Total           \$70.00         \$70.00         \$55.00           \$195.00         \$195.00         \$984.50           \$984.50         \$984.50         \$230.00	North East Medic Missing Refu Patient 9379 - Case, Jim Jr 9379 - Case, Jim Jr 9363 - Test, Ima 9363 - Carr, Berry 9392 - Test, Ellen 9404 - Williams, Forest	DOS 08/14/2009 11/13/2009 12/17/2009 01/19/2010 05/05/2010	Printed on 1200 Claim # 26847 26875 26875 26912 26912 26912 26912 26912	
27914       03/27/2012       9515 - 1est, Pam       \$70.00       (\$20.00)         27979       05/07/2012       9533 - Distler, Abigail       \$14.03       (\$0.97)         28020       06/13/2012       9550 - Test, Annette       \$10.00       (\$5.00)         28214       09/13/2012       9566 - Test, Annette       \$10.00       (\$5.00)         28299       01/24/2013       9566 - Test, Troy       (\$2.00)       (\$2.00)         28299       01/24/2013       9539 - Poland, Kimberly       \$90.00       (\$2.00)         28536       10/14/2013       9530 - Poland, Kimberly       \$90.00       (\$2.00)         Printed on 12/09/2013 12:30:48 pm (EDT)	Fund ount S0.00 S1.00 S0.00 S0.00 S0.00 S0.00 S0.00 S0.00 S0.00 S0.00	Balance         R Δi           (\$1,130.00)         (\$26.00)           (\$169.75)         (\$50.00)           (\$50.00)         (\$56.00)           (\$45.00)         (\$55.00)	Total           \$70.00           \$50.00           \$50.00           \$195.00           \$94.50           \$230.00           \$250.00	North East Medic Missing Refu Patient 9379 - Case, Jim Jr 9379 - Case, Jim Jr 9363 - Test, Ima 9383 - Car, Berry 9392 - Test, Ellen 9404 - Willims, Forest 9392 - Test, Ellen	DOS 08/14/2009 11/13/2009 12/17/2009 01/19/2010 05/05/2010 05/05/2010 06/17/2010	Printed on 1200 Claim # 26847 26847 26847 26912 26912 26918 27077 27137	
21575         5007/2012         9550-Dister, Angeli         \$14.03         (\$0.97)           28020         06/13/2012         9550 - Test, Annette         \$10.00         (\$5.00)           28294         09/13/2012         9566 - Test, Troy         (\$2.00)         (\$2.00)           28299         01/24/2013         9379 - Case, Jim Jr         \$550.00         (\$35.00)           28536         10/14/2013         9630 - Poland, Kimberly         \$90.00         (\$20.00)           Printed on 12/06/2013 12:30:44 pm (EDT)           Itsalue Heathcare           North East Medical Associates           Refund Errors Report	Fund S0.00 \$1.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$25.00 \$25.00 \$0.00	Balance         R Δı           (\$1,130.00)         (\$26.00)           (\$169.75)         (\$50.00)           (\$50.00)         (\$50.00)           (\$55.00)         (\$55.00)           (\$574.01)         (\$74.01)	Total           S70.00           \$5.00           \$195.00           \$195.00           \$294.50           \$20.00           \$25.00           \$155.00           \$155.00           \$25.00           \$155.00	North East Media Missing Refu Patient 9379 - Case, Jim Jr 9379 - Case, Jim Jr 9363 - Test, Ima 9353 - Case, Jim Jr 9363 - Test, Ellen 9404 - Williams, Forest 9392 - Test, Ellen 9392 - Test, Ellen 9355 - Normal, Abbie	DOS 08/14/2009 11/13/2009 12/17/2009 01/19/2010 01/21/2010 05/05/2010 06/17/2010 11/16/2010	Printed on 1205 Claim # 26847 26897 26897 26897 26997 26997 27937 27137 27136	
28214         09/13/2012         9566 - Test, Troy         (\$2.00)         (\$2.00)           28299         01/24/2013         9379 - Case, Jim Jr         \$50.00         (\$35.00)           28536         10/14/2013         9630 - Poland, Kimberly         \$90.00         (\$20.00)           Printed on 1209/2013 12:30:46 pm (EDT)           ISatus Heathcare           North East Medical Associates           Refund Errors Report	Fund ount \$0.00 \$1.00 \$0.00 \$0.00 \$0.00 \$0.00 \$25.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00	Balance         R Ar           (\$1,130.00)         (\$26.00)           (\$510.00)         (\$50.00)           (\$50.00)         (\$50.00)           (\$545.00)         (\$545.00)           (\$54.01)         (\$520.00)           (\$74.01)         (\$20.00)	Total           \$70.00           \$50.00           \$195.00           \$230.00           \$250.00           \$250.00           \$250.00           \$250.00           \$250.00           \$270.00           \$270.00           \$50.00           \$250.00           \$250.00           \$270.00           \$270.00	North East Media Missing Reful Patient 9379 - Case, Jim Jr 9379 - Case, Jim Jr 9379 - Case, Jim Jr 9363 - Cart, Ilma 9353 - Cart, Berry 9392 - Test, Ellen 9404 - Williams, Forest 9392 - Test, Ellen 9355 - Normal, Abbie 9513 - Dieter, Abicail	DOS 08/14/2009 11/13/2009 12/17/2009 01/19/2010 01/21/2010 05/05/2010 06/17/2010 03/27/2012	Printed on 12/05 Claim # 26847 26812 26912 26918 27077 27137 27361 27914	
28299         01/24/2013         9379 - Case, Jim Jr         \$50.00         (\$35.00)           28536         10/14/2013         9630 - Poland, Kimberly         \$90.00         (\$20.00)           Printed on 1209/2013         12:30:46 pm (EDT)         ISatus Healthcare           North East Medical Associates           Refund Errors Report	Fund count \$0.00 \$1.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00	Balance         R A           (\$1,130.00)         (\$26.00)           (\$560.00)         (\$560.00)           (\$545.00)         (\$540.00)           (\$545.00)         (\$540.00)           (\$545.00)         (\$50.00)           (\$50.00)         (\$50.00)           (\$50.00)         (\$50.00)	Total           Total           \$70.00           \$55.00           \$195.00           \$284.50           \$284.50           \$280.00           \$250.00           \$250.00           \$250.00           \$250.00           \$250.00           \$250.00           \$150.00           \$150.00           \$150.00           \$150.00           \$150.00           \$150.00           \$150.00	North East Medic Missing Refu 9379 - Case, Jim Jr 9379 - Case, Jim Jr 9379 - Case, Jim Jr 9383 - Test, Ima 9383 - Carr, Berry 9392 - Test, Ellen 9392 - Test, Ellen 9355 - Normal, Abbie 9515 - Test, Pam 9530 - Distler, Abigail 9550 - Test, Annette	DOS 08/14/2009 11/13/2009 11/13/2009 01/19/2010 05/05/2010 06/17/2010 03/27/2012 05/07/2012 05/07/2012	Printed on 1200 Claim # 26847 26912 26912 27077 27137 27361 27914 27975 28020	
28536 10/14/2013 9630 - Poland, Kimberly \$90.00 (\$20.00) Printed on 12/09/2013 12:30:46 pm (EDT) ISatus Healthcare North East Medical Associates Refund Errors Report	Fund iount \$0.00 \$1.00 \$0.00 \$0.00 \$0.00 \$25.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00	Balance         R           (\$1,130.00)         (\$26.00)           (\$50.00)         (\$50.00)           (\$50.00)         (\$50.00)           (\$54.00)         (\$54.00)           (\$54.00)         (\$54.00)           (\$57.41)         (\$2.00)           (\$0.97)         (\$5.00)           (\$2.00)         (\$2.00)	Total           \$70.00           \$50.00           \$50.00           \$50.00           \$195.00           \$220.00           \$195.00           \$220.00           \$195.00           \$195.00           \$220.00           \$195.00           \$195.00           \$100.00           \$100.00           \$10.00           \$14.03           \$10.00           \$220.00	North East Medic Missing Reful 9379 - Case, Jim Jr 9379 - Case, Jim Jr 9363 - Test, Ima 9353 - Car, Berry 9392 - Test, Ellen 9392 - Test, Ellen 9392 - Test, Ellen 9355 - Normal, Abbie 9515 - Test, Pam 9513 - Distler, Abigail 9550 - Test, Annette 9566 - Test, Troy	DOS 08/14/2009 11/13/2009 12/17/2009 01/19/2010 01/19/2010 05/05/2010 06/17/2010 03/27/2012 05/07/2012 06/13/2012	Printed on 1205 Claim # 26847 26872 26912 26912 26912 27137 27137 27137 27137 27137 27137 27137 27137 27137 27137 27137 27137 27137 27137 27137 27137 27137 27137 27137 27137 27137 27137 27137 27137 27137 27137 27137 27137 27137 27137 27137 27137 27137 27137 27137 27137 27137 27137 27137 27137 27137 27137 27137 27137 27137 27137 27137 27137 27137 27137 27137 27137 27137 27137 27137 27137 27137 27137 27137 27137 28147 28147 28147 28147 28147 28147 28147 28147 27137 27137 27137 27137 27137 27137 27137 27137 27137 27137 27137 27137 27137 27137 27137 27137 27137 27137 27137 27137 27137 27137 27137 27137 27137 27137 27137 27137 27137 27137 27137 27137 27137 27137 27137 27137 27137 27137 27137 27137 27137 27137 27137 27137 27137 27137 27137 27137 27137 27137 27137 27137 27137 27137 27137 27137 27137 27137 27137 27137 27137 27137 27137 27137 27137 27137 27137 27137 27137 27137 27137 27137 27137 27137 27137 27137 27137 27137 27137 27137 27137 27137 27137 27137 27137 27137 27137 27137 27137 27137 27137 27137 27137 27137 27137 27137 27137 27137 27137 27137 27137 27137 27137 27137 27137 27137 27137 27137 27137 27137 27137 27137 27137 27137 27137 27137 27137 27137 27137 27137 27137 27137 27137 27137 27137 27137 27137 27137 27137 27137 27137 27137 27137 27137 27137 27137 27137 27137 27137 27137 27137 27137 27137 27137 27137 27137 27137 27137 27137 27137 27137 27137 27137 27137 27137 27137 27137 27137 27137 27137 27137 27137 27137 27137 27137 27137 27137 27137 27137 27137 27137 27137 27137 27137 27137 27137 27137 27137 2717 271	
Printed on 12/09/2013 12:30/48 pm (EDT) ISalus Healthcare North East Medical Associates Refund Errors Report	Fund count 50.00 51.00 50.00 50.00 50.00 50.00 525.00 50.00 50.00 50.00 50.00 50.00 50.00 50.00 50.00 50.00	Balance         R Δt           (\$1,130.00)         (\$26.00)           (\$169.75)         (\$50.00)           (\$50.00)         (\$50.00)           (\$50.00)         (\$50.00)           (\$55.00)         (\$55.00)           (\$74.01)         (\$20.00)           (\$5.00)         (\$5.00)           (\$5.00)         (\$5.00)           (\$5.00)         (\$5.00)	Total           S70.00           \$55.00           \$195.00           \$94.50           \$220.00           \$195.00           \$195.00           \$24.50           \$25.00           \$195.00           \$195.00           \$195.00           \$195.00           \$25.00           \$150.00           \$170.00           \$14.03           \$14.03           \$14.00           \$25.00	North East Medic Missing Reful Patient 9379 - Case, Jim Jr 9379 - Case, Jim Jr 9363 - Test, Ima 9353 - Car, Berry 9352 - Test, Ellen 9404 - Williams, Forest 9392 - Test, Ellen 9355 - Normal, Abbie 9515 - Test, Pam 9533 - Distler, Abigail 9550 - Test, Annette 9566 - Test, Troy 9379 - Case, Jim Jr	DOS 08/14/2009 11/13/2009 12/17/2009 12/17/2010 01/19/2010 05/05/2010 06/17/2010 05/07/2012 06/13/2012 06/13/2012 09/13/2012	Printed on 1205 Claim # 26847 26872 26872 26912 26912 26912 26912 27914 27975 27027 27137 27361 27975 28020 28214 28295	
	Fund ount \$0.00 \$1.00 \$0.00 \$0.00 \$0.00 \$25.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$1.00 \$1.00 \$0.00 \$1.00 \$1.00 \$1.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.000 \$0.000 \$0.000 \$0.000 \$0.0000\$00 \$0.0000\$00 \$0.000\$000 \$0.000\$000\$	Balance         R Ar           (\$1,130.00)         (\$26.00)           (\$520.00)         (\$50.00)           (\$50.00)         (\$50.00)           (\$545.00)         (\$545.00)           (\$54.01)         (\$20.00)           (\$5.00)         (\$2.00)           (\$55.00)         (\$2.00)           (\$20.00)         (\$20.00)	Total           Total           \$70.00           \$5.00           \$195.00           \$230.00           \$250.00           \$195.00           \$24.50           \$25.00           \$25.00           \$25.00           \$25.00           \$25.00           \$25.00           \$25.00           \$25.00           \$25.00           \$220.00           \$220.00           \$25.00           \$220.00           \$220.00           \$220.00           \$220.00           \$220.00           \$220.00           \$220.00           \$2150.00           \$220.00           \$220.00           \$220.00           \$220.00           \$220.00	North East Media Missing Refu Patient 9379 - Case, Jim Jr 9379 - Case, Jim Jr 9383 - Test, Ima 9383 - Test, Ima 9383 - Test, Ellen 9404 - Williams, Forest 9404 - Williams, Forest 9404 - Williams, Forest 9405 - Test, Ellen 9515 - Normal, Abbie 9515 - Test, Pam 9513 - Dister, Abigail 9550 - Test, Annette 9566 - Test, Troy 9379 - Case, Jim Jr 9630 - Poland, Kimberly	DOS 08/14/2009 11/13/2009 12/17/2009 01/19/2010 01/21/2010 05/05/2010 06/17/2010 05/07/2012 05/07/2012 05/07/2012 05/07/2012 05/07/2012 05/07/2012 05/07/2012 05/07/2012 05/07/2012 05/07/2012	Printed on 1205 Claim # 26847 26837 26912 26912 26912 26912 27914 27957 27133 27361 27914 27952 28020 28214 28252 282536	
Claim # DOS Patient Total Refund Amount	Fund S0.00 S1.00 S0.00 S0.00 S0.00 S0.00 S0.00 S0.00 S0.00 S0.00 S0.00 S0.00 S0.00 S0.00 S0.00 S0.00 S0.00 S0.00 S0.00 S0.00 S0.00 S0.00 S0.00 S0.00 S0.00 S0.00 S0.00 S0.00 S0.00 S0.00 S0.00 S0.00 S0.00 S0.00 S0.00 S0.00 S0.00 S0.00 S0.00 S0.00 S0.00 S0.00 S0.00 S0.00 S0.00 S0.00 S0.00 S0.00 S0.00 S0.00 S0.00 S0.00 S0.00 S0.00 S0.00 S0.00 S0.00 S0.00 S0.00 S0.00 S0.00 S0.00 S0.00 S0.00 S0.00 S0.00 S0.00 S0.00 S0.00 S0.00 S0.00 S0.00 S0.00 S0.00 S0.00 S0.00 S0.00 S0.00 S0.00 S0.00 S0.00 S0.00 S0.00 S0.00 S0.00 S0.00 S0.00 S0.00 S0.00 S0.00 S0.00 S0.00 S0.00 S0.00 S0.00 S0.00 S0.00 S0.00 S0.00 S0.00 S0.00 S0.00 S0.00 S0.00 S0.00 S0.00 S0.00 S0.00 S0.00 S0.00 S0.00 S0.00 S0.00 S0.00 S0.00 S0.00 S0.00 S0.00 S0.00 S0.00 S0.00 S0.00 S0.00 S0.00 S0.00 S0.00 S0.00 S0.00 S0.00 S0.00 S0.00 S0.00 S0.00 S0.00 S0.00 S0.00 S0.00 S0.00 S0.00 S0.00 S0.00 S0.00 S0.00 S0.00 S0.00 S0.00 S0.00 S0.00 S0.00 S0.00 S0.00 S0.00 S0.00 S0.00 S0.00 S0.00 S0.00 S0.00 S0.00 S0.00 S0.00 S0.00 S0.00 S0.00 S0.00 S0.00 S0.00 S0.00 S0.00 S0.00 S0.00 S0.00 S0.00 S0.00 S0.00 S0.00 S0.00 S0.00 S0.00 S0.00 S0.00 S0.00 S0.00 S0.00 S0.00 S0.00 S0.00 S0.00 S0.00 S0.00 S0.00 S0.00 S0.00 S0.00 S0.00 S0.00 S0.00 S0.00 S0.00 S0.00 S0.00 S0.00 S0.00 S0.00 S0.00 S0.00 S0.00 S0.00 S0.00 S0.00 S0.00 S0.00 S0.00 S0.00 S0.00 S0.00 S0.00 S0.00 S0.00 S0.00 S0.00 S0.00 S0.00 S0.00 S0.00 S0.00 S0.00 S0.00 S0.00 S0.00 S0.00 S0.00 S0.00 S0.00 S0.00 S0.00 S0.00 S0.00 S0.00 S0.00 S0.00 S0.00 S0.00 S0.00 S0.00 S0.00 S0.00 S0.00 S0.00 S0.00 S0.00 S0.00 S0.00 S0.00 S0.00 S0.00 S0.00 S0.00 S0.00 S0.00 S0.00 S0.00 S0.00 S0.00 S0.00 S0.00 S0.00 S0.00 S0.00 S0.00 S0.00 S0.00 S0.00 S0.00 S0.00 S0.00 S0.00 S0.00 S0.00 S0.00 S0.00 S0.00 S0.00 S0.00 S0.00 S0.00 S0.00 S0.00 S0.00 S0.00 S0.00 S0.	Balance         R           (\$1,130.00)         (\$26.00)           (\$520.00)         (\$50.00)           (\$50.00)         (\$50.00)           (\$50.00)         (\$54.00)           (\$54.00)         (\$5.00)           (\$50.00)         (\$52.00)           (\$22.00)         (\$35.00)           (\$20.00)         (\$20.00)	Total           S70.00           \$5.00           \$5.00           \$195.00           \$230.00           \$25.00           \$195.00           \$24.00           \$25.00           \$25.00           \$25.00           \$25.00           \$25.00           \$25.00           \$25.00           \$25.00           \$25.00           \$220.00           \$25.00           \$25.00           \$220.00           \$25.00           \$20.00           \$20.00           \$20.00           \$20.00           \$20.00           \$20.00           \$20.00           \$20.00           \$20.00           \$20.00           \$20.00           \$20.00           \$20.00           \$20.00           \$20.00           \$20.00           \$20.00           \$20.00           \$20.00           \$20.00           \$20.00           \$20.00           \$20.00      >>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>	North East Media Missing Refu 9379 - Case, Jim Jr 9379 - Case, Jim Jr 9363 - Test, Ima 9363 - Test, Ima 9363 - Car, Berry 9392 - Test, Ellen 9404 - Williams, Forest 9392 - Test, Ellen 9355 - Normal, Abbie 9515 - Test, Pam 9533 - Distler, Abigail 9550 - Test, Annette 9566 - Test, Troy 9530 - Poland, Kimberly (EDT) North East Medical Ass Refund Errors Ref	DOS 08/14/2009 11/13/2009 12/17/2009 12/17/2010 01/19/2010 05/05/2010 05/05/2010 05/07/2012 06/17/2012 05/07/2012 06/13/2012 09/13/2012 09/13/2012 09/13/2012 09/13/2012	Printed on 12/05 Claim # 26847 26873 26873 26873 26912 27017 27133 27361 27914 27974 27952 28214 28296 282536 Printed on 12/05	

### Billing: Working the Refund Report

Once the Refund report is ran you can work the refunds directly from the real time online reports.





Comment Tes	4 In the Credit Entry window, in the Refund To drop down select the refundee you would like the credit to be applied to, then click ok.
Claim Patient Claim # 28020 Chart # 9550 Name Annette Test Credit Detail Deposit Date * 06/13/2012 Amount *\$5.00 Claim * Refund	Claim Level Primary V
Ctatus         Resp. Party - Test, Annette           Payment         * \$-5.00 - Co-Pay from Annette Test	<ul><li>✓</li><li>✓</li></ul>
Comment	<u>O</u> K <u>C</u> lose

# Billing: Completing a Refund to a Patient/ Payer

In the Refund Report, double click on the Claim # of the claim you would like to do the refund to.

North East Medical Associates Refund								
Refundee								
Claim #	DOS	Patient	Rendering Provider	Amount				
Case, Mary (R	esponsible F	Party) (\$25.00)	-					
26873	11/13/2009	9379 - Case, Jim Jr	Harrigan, Caswall MD	(\$1.00)				
9491 - Hall, Te	eresa (Patien	t) (\$25.00)						
28221	11/14/2012	9491 - Hall, Teresa	Collins, Ann MD	(\$25.00)				
9406 - Ott, Jor	nathan (Patie	nt) \$10.00						
27022	04/07/2010	9406 - Ott, Jonathan	Smith, Troy MD	(\$10.00)				
9346 - Simpso	n, Homer (P	atient) \$19.50						
26794	05/21/2008	9346 - Simpson, Homer	Harrigan, Caswall MD	(\$25.00)				
9347 - Stolz, k	(im (Patient)	\$0.00						
26842	07/31/2009	9347 - Stolz, Kim	Webster, Thomas MD	(\$200.00)				
9550 - Test, A	nnette (Patie	nt) (\$17.00)						
28225	11/15/2012	9550 - Test, Annette	Collins, Ann MD	(\$35.00)				
28495	07/25/2013	9550 - Test, Annette	Armstrong, Thomas DDS PC	(\$15.00)				
			Test, Annette Total	(\$50.00)				
9363 - Test, In	na (Patient) (	\$279.75)						
27333	11/02/2010	9363 - Test, Ima	Belza, Robert MD	(\$110.00)				
36467 - Golde	n Rule Insura	ance Company (Payer)						
27137	06/17/2010	9392 - Test, Ellen	Belza, Robert MD	(\$25.00)				
36491 - Group	Insurance S	ervice Center, Inc, (Payer)						
26958	02/24/2010	9380 - Caser, Jill	Swaim, J MD	(\$25.00)				
			Total Refunds	(\$471.00)				

In the claim window click on Payments.

3

On the Payment window create an Adjustment for the value of the credit, using Refund to Patient or Refund to Insurance as the adjustment type.

2

The adjustment type will be based on who the refund will be made out to. You can also enter a check number under the ID # on the adjustment line.

Paymer	nt Webpag	je Dialog			1	0.5 10	×
Patient Chart #	9550 💆	Last Test	F	irst Annette	Rendering Pro	ovider Collins I	MD, Ann C.
Ins 1	Aetna		Ins 2		Ins	3	
_Claim							
Claim #	28225 <u>S</u> ta	atus * Refund				✓ Lev	el Statement 🗸
- Payment	Detail	Daid Da					
Line #	12/09/201	Paid By	nette				Post
	Amount *	Method	*	Type *		ID #	
Payment			~	.,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,	~		Comment
Adjustme	nt \$35.00	Refund to Pa	tient				Clear
Comman		1					EOB
Commen	•					0.	,
		-				Co	mplete
Pa	yments	Receip	ts *				
Payr	nents						Row 1 of 1
F	rom Date	Procedure	Completed	Paid	Adjustment	Amount	Amount Due
1 11/	15/2012	99213	N	(\$105.00)	(\$20.00)	\$90.00	(\$35.00)
						4 Click	Post.
			Claim Totals:	(\$105.00)	(\$20.00)	\$90.00	(\$35.00)

		Th cru cru an Do	is action will result edit record(s) from edit total of -\$35.00 adjustment of \$35 o you wish to contin	in the adjustme a to \$0.00, which .00. nue?	ent of h is
On the Credit E up window sele credit and click Credit Entry We Claim	Entry pop- ect the Adjust. bpage Dialog Patient Chart # 9550	Name Appette	Test	<u>Y</u> es Credit	No
Credit Detail	Date	Pefundee	llear	Amount \$35.	00
1 99213	12/05/2013 A	Annette Test	Farias, Michell	\$35.0	
					~
Dow 1 of 1					
ROWTOTT					<u>C</u> lose
Adjust					Sabe
Adjust				•	

Billing: Medicare Secondary MSP

How to enter a MSP reason when Medicare is secondary.

RPA Reject: OTHER PAYER INSURANCE TYPE CODE IS MISSING OR INVALID

The claims rejected on RPA frontend because the Insurance Type code/ SBR05 value in Loop 2320 is missing.

The Insurance type code / SBR05 value is required when Medicare is a Secondary Payer.

Please correct and resubmit the claims with Insurance type code in Loop 2320~ SBR05.

#### 1. Go to the patient set up.



2. Click on the insurance Tab.



3. Click on Medicare secondary


#### 4. Choose the MSP reason

Gender	Description	Code	
Relationship	Black Lung	<b>л</b> 1	
DOB	Employer Group	12	alty
	ESRD	13	
Insurance Policy	Large Group Health Plan (LGHP)	43	
	No-Fault Insurance	14	
Start	Other Liability Insurance	47	
Davar	PHS or Other Fed. Agency	16	h
Payer	Veteran's Administration	42	4
Туре	Worker's Compensation	15 💙	
MSP Reason		~	
			· U

#### 5. Click Save.



### Billing: How to pull a referring providers list

How to Pull a referring Provider list. For various reasons one possibly being marketing, you may need to pull your referring doctors list. Follow the steps below to obtain the list:

1.Got to the Billing Portal



2. Click on the top toolbar on the down arrow by setup screens tool tip and click provider.



3. Once the provider search opens click on advanced Search.

Click here	to use advanced sear	ch featu	ires		
Advanced Search					
Last N		NPI	=		

#### 4. Choose referring

Advance	d Search	$\times$
▼Commonly L	Jsed	•
Doctor #		$\square$
Rendering	○ N/A ○ Rendering	
✓ Demographi	cs	

#### 5.Click Search.



6. The list will populate. Now you can print to pdf or export to excel by navigating to the purple gear.

	lo1
Provid	er Search 🔯
	Security
	Screen
	Company
789	User
	Setup
	Print
	Audit
	Refresh
	Close
View	Report
How v	vould you like to view your report?
	Print

#### Choose print

### Billing: PM/DMA estatement payments look up

To Identify EStatement deposits from Pay Simple

xport

If you are specifically just looking for the eStatement payments, then you can also click on the More button in

Deposits and select Statement ePayments. Set a reporting date and then refresh to get the list.

Steps

1. Billing Portal



#### 2.Deposits



#### 3.More

- 1	More window actions							
	1							
1	Train	More						
		2						

#### 4.Select EPayments



#### 5. Choose dates

Statement	Responsible Party	Patient	Amount	Message	Revie
	(aspendible ) any			moodgo	

#### 6.Refresh the list



You can also search for Statement deposits and look at the check/trace id. The eStatement payments will display CC information instead of a true check number.

#### 1. Go to the billing portal.



#### 2.Click on Deposits



3.Click on Advanced search

Advanced Search	¢

		-
Ad	Deposit Status	\$
	•	

4.Search for the trace ID

Deposit Date	•		<b>V</b>	
Check/Trace	ID			
Model	$\bigcirc$	● Standard 〇 Converted	◯ Legacy	() N/A

Please also note that in reports the payer is going to be the responsible party from the statement.

### Adding Guarantor

# **Adding Guarantor**

When adding an insurance to a patient account, sometimes the Guarantor is someone other than the patient. There are a few fields necessary to set this up properly to prevent billing issues.

- 1. From the Patient Setup screen, select the Insurance tab. Always select New to add a new insurance.
- 2. Flip Coverage to appropriate designation depending on whether it is primary, secondary, or tertiary.
- 3. Add start date, payer, Insured ID and any other necessary information.
- 4. If Guarantor is the patient, select Same as Patient. If it is an individual other than the patient, select Individual.
  - If Guarantor has the same demographic info as the patient, select Populate Patient Information. Edits can be made to fields if needed.
  - By default, Signature will only prepopulate if Guarantor is the same as patient. When adding a different Guarantor, it is necessary to check the Signature box and add the date. Typically, this will be the same date the patient signed, or the policy start date. If the signature box is not checked, this will cause claims to fail.
  - It is also critical to fill in the relationship to the Guarantor and the DOB.

Patient Setup	New Save Train More T3st, Danielle Born 01-Jan-1975(46y) Gender Female
0	Cov.     Active Payer     Primary ID     Group/Policy #     Copay       1     Y     United Healthcare     123455789     \$40.00
	Guarantor
Summary	Coverage 1 V Insured O Same as Patient  Individual O Company Populate Patient Information
Demographics	First         Dan         Address 1         100 Main St         Phone         (555) 555-5555         Ext
Insurance	Middle Signature V 01/01/2000
Responsible Party	Last T3st City Knoxville
	Suffix State TN V Country USA V Zip Code 37922
Emergency Contact	Gender Female V Email danielleseals@isalushealthcare.com
Comments	Relationship Parent V Employer
Case Management	DOB • 03/07/1947 Property Casualty
Sliding Fee	Insurance Policy
Immun. Registry	Start 01/01/2019 🗧 End Senefit Reset
Patient Extension	Payer United Healthcare C Insured ID Member ID # V 123456789
Patient Extension	Type Commercial V Secondary ID V
Miscellaneous	MSP Reason Group Name
Referral Tracking	Copay
	Deductible Amount Met
	Max out of Pocket Met
	Authorization Required Do not perform 270 eligibility Document List Order Route Eligibility

### Adding Responsible Party

# Adding Responsible Party

By default, the system will assign the patient as their own Responsible Party. When the patient is under the age of 18, it is strongly encouraged to assign a legal adult as the Responsible Party. When it comes to billing, there are many errors that can come from not having a legal adult as the Responsible Party. There are other reasons a patient would not be their own Responsible Party as well.

- 1. From the Patient Setup screen, select the tab Responsible Party. Always select New to add a different Responsible Party (RP) and flip the Order to 1 for the default RP. This is so that if a patient ever needs to become their own RP, the setup exists, such as when a minor turns 18.
- 2. Select Individual or Company, depending on the situation.
- 3. If the RP has the same demographic information as the Patient, select Populate Patient Information to fill in majority of the fields. Changes can be made if needed to the address, email, phone fields.
- 4. Be sure to enter Gender, Relationship and DOB for the RP.
- 5. If the practice opts to have statements emailed and the RP elects this option, check the box to Email Patient Statements, enter the Security Type and Security Data. This will be the PIN information to protect patient health information.

Patient Setup		ê		T3s	t, Daniell	e Born	01-Jan-1	975(46y) Gena	der Fema	le 🔎 🏚
	New Save	Train More								
	# First Name	Last Name				Prima	ary ID	Relationship		
<b>()</b>	1 Dan 2 Danielle	T3st T3st						Father		^
										~
	Responsible Party									
Summary	Order 1	~	Туре	Same as Pa	tient 💿 In	dividual	O Compa	ny <u>Populat</u>	e Patient Info	ormation
	First D	an	Address 1	100 Main St			Home	(555) 555-5555	Ext	
Demographics	Middle		Address 2				Work	(555) 555-5555	Ext 555	
Insurance	Last * T	3st	City	Knoxville			Other	(555) 555-5555	Ext	
Responsible Party	Suffix		State	TN 🗸	Country	USA	V Zip Co	ode 37922	]	
Emergency Contact	Gender M	lale 🗸	Email	danielleseals@	)isalushealthca	are.com				
Comments	Relationship Fa	ather 🗸	Employer							
Comments	DOB 03	3/07/1947 😂 💳	ID Type		V ID V	/alue				
Case Management	<ul> <li>Email Patien</li> </ul>	t Statements								
Sliding Fee	Security T	ype Patient DOB		✓ Security I	Data 01/01/19	75		1		
Immun. Registry	This patient I	has statements that are marked	as past due.					_		

### **Assigning Users to Letters**

### Letters -Granting access to users

Users will need to be assigned letter templates that are viewable from their log-in. Based on the letter template, the letter will be viewable in EMR, iScheduler or Billing portal or assigned to be a SOAP note or Intake Letter.

- 1. From Setup
- Navigate to Setup/EMR Setup/Letters (Admin user)



• Click User Setup to bring up the User Assignment page

Gran Setup: Letters										
	🗋 N	ew 📝	Open	Сору	🐰 D	elete	T	User Setup	🔁 Ref	resh
	Letter Templates									
	ID  Template Name Letter Type								Clai	
	1 16 Audiology SOAP Note SOAP Note									
	2	12	Basic Pro	ocedure Co	onsent	C	Conse	nt		

#### • Grid Assignment

	Letter	!adam	lagarcia!	!amanda	!awade	!bbarnes	!blake	!carole	!cdaoud	!chandler
$\sim$	Audiology SOAP Note					×		×		
	Basic Procedure Consent					×		×		×
	EMR Nurse Note – Base	×	×	×	×	×	×	×	×	×
	Follow up Letter to Referring	×	×	×	×	×	×	×	×	×
	Follow-up Letter to Referring	×	×	×	×	×	×	×	×	×
	Initial Letter to Referring	×	×	×	×	×	×	×	×	×
Summary	Medical SOAP Note					×		×		
rid Assignment	MML Welcome Letter	×	×	×	×	×	×	×	×	×
and Assignment	New MyMedicalLocker Print Instructions	×	×	×	×	×	×	×	×	×
ser Assignment	New MyMedicalLocker Welcome Letter	×	×	×	×	×	×	×	×	×
fault Assignment	Patient Generic Letter	×	×	×	×	×	×	×	×	×
	Referral to Specialist	×	×	×	×	×	×	×	×	×
	Return to Work/School w/ limit	×	×	×	×	×	×	×	×	×
	SOAP Note					×				
	SOAP Note	×	×	×	×	×	×		×	×

Assign letter template to users via Grid Assignment by putting x in box to assign or assign a letter to all users by clicking the letter name. You can also assign all letters to a user by clicking the user name, then click Save.

#### User Assignment

Assign multiple letters to multiple users or all items to one or more user



#### • Default Assignment

Assign the Default Letter to load in the EMR to multiple users from this window

Letter	New Save Train				Letter Assignment	Д¢
	Letter Assignment Default Items			Users All Users   Select	ed Users	
	Item	ID		✓ User	ID	
	Audiology SOAP Note	16	~	<ul> <li>Adam Kaiser</li> </ul>	!adam	^
	Basic Procedure Consent	12		<ul> <li>Adrian Garcia</li> </ul>	lagarcia	
	EMR Nurse Note - Base	6		<ul> <li>Alex Wade</li> </ul>	!awade	
	Follow up Letter to Referring	11		Alex Wade	awade	
	Follow-up Letter to Referring	5		Allison Bowlick	abowlick	
	<ul> <li>Initial Letter to Referring</li> </ul>	4		<ul> <li>Amanda Weber</li> </ul>	!amanda	
	Medical SOAP Note	15		Anthony Miller	amiller	
Summary	MML Welcome Letter	7		Ben T Stipes	bstipes	
	New MyMedicalLocker Print Instructions	9		<ul> <li>Blake Head</li> </ul>	!blake	
Grid Assignment	New MyMedicalLocker Welcome Letter	8		<ul> <li>Brooke Barnes</li> </ul>	!bbarnes	
5	Patient Generic Letter	3		<ul> <li>Carole Howard</li> </ul>	Icarole	
User Assignment	Referral to Specialist	10		Carole Howard	choward	
	Return to Work/School w/ limit	2		Carole Test	ctest	
Default Assignment	SOAP Note	13		<ul> <li>Chandler Head</li> </ul>	Ichandler	
	SOAP Note	14		Chandler Head	chead	
				<ul> <li>Christy Stipes</li> </ul>	!christv	
				Christy T Stipes	cstipes	
	-2			Cliff Daoud	ledaoud	

#### 2. From User Setup

Letters can be assigned to users via the User Setup window.

• Navigate to Setup/Basic Setup/User Setup or click Current User at the bottom left corner



- Select User to assign letters
- Single or multi-select letters and click Save

	Q 🖪 🗅 🖻 🕹 🛇 🕭 🧝 🐓 🥂	
Users	Letters - Test, John (jtest)	Section
Pedulla, Ted		Setup
Poland, Kim 🧧	▲ Default Letter Template	User
Rasmussen, Dawn	Patient Generic Letter	User Groups
Rivers, Kelly		User Cross Reference
Rivers, Kelly	Assigned Letter Templates	MyTask Superbill
Seals, Danielle	All	MyTask Progress Notes
Seals, Danielle	Consent	Resources
Simpson, Homer	Basic Procedure Consent	Roles
Smith, Janet	EMR Nurse Note	Scheduler - Resources
Smith, Staci	EMR Nurse Note - Base	Fax
Smith Talia	Excuse	Templates
Stines Ben T	✓ Return to Work/School w/ limit	Immunizations
Stipes Christy	MyMedicalLocker	✓ Letters
Stipes Christy T	VMML Welcome Letter	Templates - New
T3st Julie	New MyMedicalLocker Print Instructions	Allergies
Test, Carole	New MyMedicalLocker Welcome Letter	Assessments
Test, Danielle	Patient	Exams
Test, Erica C.	✓ Patient Generic Letter	Treatment Plans
Teet, lay	SOAP Note	HPI
🗸 Test, John	Referring	Orders
lest, Karen	✓ Follow up Letter to Referring	Patient Extension
Test, Tina	Follow-up Letter to Referring	
Wade, Alex	✓ Initial Letter to Referring	Dialweie Vieit
Wade, Alex	✓ Referral to Specialist	Other
Ward, Clone	SOAP Note	
Weber, Amanda	Audiology SOAP Note	ChartShareMD
vvniting, jem t	Medical SOAP Note	Sign Off

• Select Default Letter Template to load in the Letter Chart Tab

# FAQ: Unable to view the full Patient Transaction History under Patient Setup

Initially a new user may not see a full listing of the Patient Transaction History under the Patient Setup. The default settings of the Patient Transaction Search may only be set to show Claims with a balance.

The following steps can be used to update this setting.

1. Go to the Patient Transaction History screen. This can be done by Double clicking on the Balance line of Patient Setup.



The Patient Transaction History Webpage Dialog box will appear. Click on the two downward facing arrows.

#### Patient Transaction History -- Webpage Dialog

🖶 🚺 🛤 • 🗩 • 🕸 • 🕄	
Claims	*

3. Place a check in the Display Zero Checkbox. This will now allow zero balance claims to appear in the Patient Transaction History.

ខ Patient Transaction History Webpage Dialog	
🖶 💋 🛤 • 🗩 • 🕸 • 🔞	
Claims	\$
Check/ID	
Service	
Deposit	
Balances V Display Patient V Display Unsubmitted	
Display Insurance Display Zero	ø٩

### Authorization Report in Billing Portal

In this document we will train you how to work through the Authorization Report.

1. Navigate to the Billing Portal.

iScheduler
😃 Billing
eDocura 🎬

2. Click on Authorizations under the Blue Insurance Bar.

Insurance
Authorizations
Billing Query M

3.Now you can view the search criteria to find an Authorization.

	h Criteria	Search	Results					Max R	Rows 25	Cje	ear	Searc
Authorizat	tion				Eff	ective S	tart Date		Effect	ive End	Date	
Reason	Now				Sta	rt		0	Start			0
Гуре	✓ Free Form Appointments Claims with Mi	with Missing/ issing/Invalid	invalid Autho Authorizatio	rizations IS	End Au Sta	i ⊡ ^a thorizati rt	on Date		End Visits Visits I	ld∎ /Amoun Left <	it	
Status	Needs Review Received Auth not requir Inactive	red 🗸	Tracking Claim	Referred By Referred To Authorization Referral		Proced	lure		Units I Amour	_eft < nt Left <		
Payer			USERID		~							
Rende	ering	^	Prov	der		Diagno	sis					
Rende	ering	< >	Prov	der		Diagno	sis					

4.After entering your criteria click on search.



5. Then your search result will open in the next tab

				Max	Rows 25	Ujeai	Sean
/	Appointments w	vith Missing/Invalid Authorizations					Row 0 of
	Status	Patient	Scheduled	✓ App. Date	Primary	Second.	Tertiary
1	Checked-Out	Galindo Moreno, Ramon	Castor PA-C, Zachary	02/26/2021 3:30PM		~	×
2	Checked-Out	Weber, Denise A.	Jensen MD, Jonathan A.	02/26/2021 2:30PM	1	<ul> <li>Image: A second s</li></ul>	<ul> <li>Image: A second s</li></ul>
3	Checked-Out	Robl, Richard M.	Nabbout MD, Philippe	02/26/2021 2:00PM		<ul> <li>Image: A second s</li></ul>	<ul> <li>Image: A second s</li></ul>
4	Scheduled	Ryan, John P. II (Patrick)	Farha MD, Ayham	02/26/2021 11:30AM		<b>~</b>	<ul> <li>Image: A second s</li></ul>
5	Checked-Out	Jones, James M. (Jim)	East DTE	02/25/2021 4:00PM		<b>~</b>	<ul> <li>Image: A second s</li></ul>
6	Checked-Out	Higbee, Dan F.	Saad MD, Kahlil	02/25/2021 3:30PM		<ul> <li>Image: A second s</li></ul>	~

6.Double click on the authorization to view the Auth or change information in the Auth.



### **Custom Claim Validating Edit**

CUSTOM CLAIM VALIDATION EDITS

This article will provide some common claim validation edits and how to enter them at the procedure code set up.

Fee Group Required based on Medicare Financial Class.

Setup > Procedure Codes > 97110 > Default > Modifier > GP

🔒 🔸 Setup: Procedure	Codes	iSalus 🗮	O 🚳 7
Procedure Codes		97110 - THERAPEUTIC PROC, 1+ AREAS, EACH 1	5 MIN
<b>99211</b>	New Save ITalli	More	
<b>9921</b> 3	Diagnosis and Modifiers		
99212 97140	Code Diag	nosis 1	0
90837	Diag	nosis 5 🔍 Diagnosis 6 🔍 Diagnosis 7 🔍 Diagnosis 8	0
36415 99203	Modifiers GP		
99214 99201 99202	Code Limitations		
	*Gender Based 🔘 N	I/A 🔿 Male 🔿 Female	
	Fee required prior	authorization	
Summary	<ul> <li>Fee requires assig</li> </ul>	nment	
Code	Alerts and Switches		
Fees	*POS	~	
Billing	Required	♥	
Drug	*Modality Narrative	~	
Default			^
			~

Fee Group Required based on Financial Class.

Setup > Procedure Codes > [Enter Radiology Codes] > Defaults > Modifiers > TC

🔒 🔸 Setup: Procedure	Codes		iSalus	s <b>=</b>	ⓒ 🕷 👅 🤇
Procedure Codes		Train More	73600 - RA		I, ANKLE; 2 VIEWS 🛛
99211	New Oave I	Tail More			
99213	Diagnosis and Mod	difiers			
99212	Code	Diagnosis 1 🔍	Diagnosis 2	Diagnosis 3	Diagnosis 4
90837		Diagnosis 5 🔍	Diagnosis 6	Diagnosis 7	Diagnosis 8
36415 99203	Modifiers	TC			
99214 99201 99202	Code Limitations *Gender Based	N/A      Male	Female		
Summary	✓ Fee require	es assignment			
Code	Alerts and Switche	8			
Fees	*POS			~	
Billing	Required			~	
Drug	*Modality			*	
Default	Narrauve				^
					~
	* Item values are a	applied to all fees for this	procedure code.		

Fee Group Required based on Financial Class.

Setup > Procedure Codes > [Enter New Radiology Codes] > Defaults > Modifiers > TC

Setup: Procedure	e Codes	-	iSalu	is 🔳	🕑 👼 👅
Procedure Codes	New Save	Train More	73600 - R/	ADIOLOGIC EXAN	I, ANKLE; 2 VIEWS
<b>99211</b>					
99213	Diagnosis and Mo	odifiers			
99212 97140	Code	Diagnosis 1	Diagnosis 2	Diagnosis 3 🔍	Diagnosis 4
90837		Diagnosis 5	Diagnosis 6	Diagnosis 7 🔍	Diagnosis 8
36415 99203	Modifiers	TC			
99214 99201 99202	Code Limitations				
	*Gender Base	d 🖲 N/A 🔵 Male	Female		
	Fee requir	ed prior authorization			
Summary	✓ Fee require	es assignment			
Code	Alerts and Switch	nes			
Fees	*POS			~	
Billing	Required			~	
Drug	*Modality			~	
Dofault	Narrative				^
Dendunt					
					•

Setup > Procedure Codes > J3260 > Fees: Per Unit Fee, Units 1

🔒 🔸 Setup: Procedure	Codes	iSalus 🗮	O 🕷 📼 O U
Procedure Codes	New Save Train More	J3260 - Injection, tobramycin sulfate	e, up to 80 mg 🛛 🔍 🛱
99211 99213 99212 97140 90837 36415 99203 99214 99201 99202	Fees     Per Unit Fee       Fee Per Unit     In-House Cost		
Summary	Units Units Inits		
Fees	Time Based Fee		
Billing Drug	Minutes/Unit Round Units  Up Down		

Fee Group Required based on Medicare Financial Class.

Setup > Procedure Codes > 88305 > Billing > Billed As > G0416

G - Setup: Procedure	Codes	iSalus 🗮	O 🛤
Procedure Codes	New Save Train More	88305 - Surgical pathology, gross and micro	oscopic exa
99211 99213 99212 97140 90837 36415 99203 99214 99201 99202	Codes Billing G0416 Revenue ASA Payment Global Period 0	Only allow this code to be used once per day.     Send only revenue code on Institutional claims.	
Summary	Patient is r	responsible for payment	
Code			
Fees			
Billing			
Drug			
Default			

### **Billing DME Claims in Choice**

How to Bill DME Claims in Choice.

- 1. Location can be home
- 2. The Rendering provider will be DME
- 3. The ordering will be the rendering doctor that wrote the script for the DME.
- 4. Here is an incorrect way to bill DME.

			r	_
			Search for Patient	
5	ervice			
	Location	Home		9
	Rendering	Allison PA-C,	Megan M.	0
	Referring	Black Do DO	, Brian	0
		I	Referred	\$
	☆ Other Pro	viders		
	Alternate	Alternate Pro	vider	Q
	Supervising	Suh MD, Ron	ald S.	Q
	Ordering	Ordering Pro	vider	Q
	Attending	Attending Pro	vider	0
	Purchasing	Purchasing P	Provider	0
		Diagn	osis »	
4	1	2	3	4
	R339			

Above you would want to add the rendering to the Ordering Provider line to send the claim correctly.

### Setup Payment Method and Types for DMA ePayments

You have to go to Payments (Legacy), open Default Settings, and update the setting here.

1.Navigate to the billing portal

Billing

2. Click on Payments Legacy

Payments (Legacy) Deposits

3. Navigate to Default Settings.

N 1	Set	silling into 🔹 🖂	web searc	nes *
3 🔊 🛅		- 🏦 -		
sit		Customize	Ctrl+M	5
15 Ided Claims		Default Settings	Ctrl+E	
Claim Adjus		ERA Settings	h ال	<u>)                                    </u>
	_	r oping	TREBUIED	/

4. Change Statement to Credit card shown in screenshot below:

Default Setting	s					÷Χ
-						
Deposit Paym	ent Meth	od/Type				
Remittance	Check		~	-	Insurance Check	~
Notification	Check		~	-	Insurance Check	~
Other	Check		~	-	Insurance Check	~
Statement	Credit Ca	ard	۷	-	Statement Payment	~
Payer	Check		~	-	Insurance Check	~
Import	Check		~	-	General Payment	*
Service Line P	ayment 1	ypes				
Payment		Zero Amour	nt			~
Allowed		Allowed				~
Insurance V	Vrite Off	Insurance C	ontr	act	Adjustment	~
Co-Insurance	ce					~
Co-Pay		Copayment				~
Deductible		Deductible				~
Additional V	Vrite Offs	Insurance C	ontr	act	Adjustment	*
Interest		Interest		15	\$	~
Other			,	U		
Default Own	ier when E	RA is create	d		admin	
Range balar	nce must b	e within in or	der	to I	be posted. \$0.	00
Ū						
					OK	ose

5. click save.

Customize							
-							
Table Cell Moveme	t for Claim Posti	ng					
Tab Key Direction	Down C	Right					
Enter Key Directi	n 🔿 Down 🦲	Right					
Use Left/Righ	t Cursor Keys						
Search Display							
Sort Order  O N S S S S S	dest Claims west Claims nallest Balance						
Patch Statement B	ggest balance						
Auto-Select u	ntil balance is remo	wed Sort Orr	ter 🖲 Oldest Cla	ms			
Auto-Add sel	cted claims	00100	Newest Cla	ims			
· · · · · · · · · · · · · · · · · · ·			Smallest B	alance			
Auto Populat	navment amount			alonico			
Auto-Populat	e payment amount		O Biggest Ba	lance			
Auto-Populat Posting Results Sort Order A	Entered Pa	tient Name	Biggest Ba	lance			
Auto-Populat  Posting Results Sort Order  At  Other	e payment amount	tient Name	Biggest Ba	lance			
Auto-Populat  Posting Results Sort Order  Hide Posting	e payment amount Entered  Pa Message	tient Name	Biggest Ba	lance			
Auto-Populat  Posting Results Sort Order  Hide Posting	e payment amount Entered	tient Name	Biggest Ba	lance			
Auto-Populat Posting Results Sort Order A: Other Hide Posting	e payment amount Entered	tient Name	Biggest Ba	ance			
Auto-Populat      Posting Results     Sort Order Ar      Other      Hide Posting	e payment amount Entered	tient Name	Biggest Ba	ance			
Auto-Populat  Posting Results Soft Order Ar  Other Hide Posting	e payment amount Entered	tient Name	Biggest Ba	ance			
Auto-Populat  Posting Results Sort Order A: Other Hide Posting	Payment amount	tient Name	Biggest Ba	Close			
Auto-Populat  Posting Results Sort Order Av Other Hide Posting	Entered  Pa Message	tient Name	Biggest Ba	Close			
Auto-Populat  Posting Results Sort Order Av Other Hide Posting    Posting     Deposit Reconciliation	Entered Pa Message	tient Name	Biggest Ba	Close			
Auto-Populat  Posting Results Sort Order Au  Other  Hide Posting  Deposit Reconciliation Reporting Period	Payment amount Entered Pa Message	tient Name	Biggest Ba	Close			
Auto-Populat  Posting Results Sort Order  Auto-Volume  Hide Posting  Deposit Reconciliation  Reporting Period Date Search Type	Payment amount Entered Pa Message Webpage Dialog 10/18/2021	tient Name	Biggest Ba           OK	Cose			
Auto-Populat  Posting Results Sort Order Av Other     Hide Posting  Deposit Reconciliation Reporting Period Date Search Type Percent Owner	Payment amount Entered  Pa Message	lient Name	OK	ance			
Auto-Populat  Posting Results Sorl Order Au Other Hide Posting  Deposit Reconciliation Reporting Period Date Search Type Deposit Owner	Payment amount Entered Pa Message Webpage Dialog 10/18/2021 Deposit	tient Name	OK	] Close			
Auto-Populat  Posting Results Sort Order  Other  Hide Posting  Deposit Reconciliation Reporting Period Date Search Type Deposit Owner Deposit Status	Payment amount Entered Pa Message  Webpage Dialog  U018/2021  Deposit	Itent Name	OK	Close			
Auto-Populat      Sort Order Au     Other     Hide Posting      Deposit Reconciliation      Reporting Period      Date Search Type      Deposit Status      Deposit Status      Deposit Type	Payment amount  Entered  Pa  Message   Webpage Dialog  1  1  1  1  1  1  1  1  1  1  1  1  1	Itent Name	Biggest Ba           OK           21           V           V           V           V	Close			

# How to Run a report of Statement Payments from Data Media

To Identify EStatement deposits from Pay Simple

If you are specifically just looking for the eStatement payments, then you can also click on the More button in Deposits and select Statement ePayments. Set a reporting date and then refresh to get the list.

#### Steps

1. Billing Portal



#### 2.Deposits



#### 3.More



#### 4. Select EPayments



#### 5. Choose dates

Statement	Responsible Party	Patient	Amount	Messade	Review
otatement	Tresponsible Furty	ruton	Amount	messege	THE THE T
iteria. Giari 00/0			N	neiresn Wark Re	neweu II Clos

#### 6. Refresh the list



You can also search for Statement deposits and look at the check/trace id. The eStatement payments will display CC information instead of a true check number.

#### 1. Go to the billing portal.



#### 2. Click on Deposits



3. Click on Advanced search

 Advanced Search	¢



4. Search for the trace ID

Deposit Dat	e		<b>V</b>	
Check/Trac	e ID			
Model	Sta	andard 🔘 Convert	ed 🔿 Legacy	() N/A

Please also note that in reports the payer is going to be the responsible party from the statement.

### **Billing Toolbar Overview**

#### **Billing Toolbar Overview**

Within the Billing portal there are two toolbars.

In this guide you will learn the names of the tool bar icons and their functions. Pro tip, any icon you hover over it will tell you the name of the icon you are about to click.

1. The first icon in the billing tool bar is the billing home page icon. This Icon will take you back to the Revenue Cycle Dashboard.



2. The second Icon from the left is the reset billing window. When you click on this icon it refreshes the screen.



3. The next icon is the patient index or patient identification area. The patient icon will allow you several options from here to enter a new patient or look up existing patients.





4. The Setup Screens Icon links the user back to all the setup that is the backbone of the billing creations. The down arrow next to the setup screens tool icon has Payers, Code/ fee, Locations, Providers, and Patient information.



5. The next tool tip is the reporting windows icon. Once you click the down arrow next to the tool tip several canned reports are available in this tool.





6. The next tool tip is the Set Billing info. This tool is used for Refund maintenance, set a sliding fee scale, or to set the working date.



7. Your next tool tip is Web Searches. When you hit the down arrow you can access your analytics cubes, Clearinghouse payer list, ICD10 lookup, and NPI lookup.

8. The last icon on the first took bar is the help.



9. The next tool bar is opened by clicking on Billing Query

Billing Query
Claim S ^m mission

10. The first icon is a magnifying glass that you will click on to search billing query.



11. Second icon on the second tool bar is the eraser. It erases and resets your billing query.



12. The next icon is to find a claim. Make a claim entry screen pop out of within billing query, or to export your billing query search to excel.



13. the fourth icon on the second tool bar is to create claims manually. It is the claim options tool tip.



14. The fifth icon on the second tool bar is to provide more functionality within your billing query. If you have a claim highlighted blue in your query you can quickly access history and other functions.



15. The claim options tool tip has the functionality for you to copy claims, set reminders, make a claim comment, Modify several claims at once, Validate claims, and to create custom tasking.



16. The Submission options tool tip is a green arrow pointing to the right. When you click the down arrow next to the icon it allows for you to submit claims batches manually. It also allows you to view EDI submission window from the billing query.

, P	• 🚖 • 💸 • м
-8	Submit Claims
ij	Submit Statements
	View Submission

17. The money icon or the payment options icon allows you to post money manually into the claim.



18. The hammer and wrench also known as the display options icon is the tool tip that allows you to change your displayed view via the billing query. This is user specific. If you change your view, please note you will have to click on the magnifying glass tool tip again for that query to take effect.

*	<ul> <li>Max. Rows 9999</li> </ul>
*	Display Recent Year
~	Display Balances
*	Display Zero Balance
*	Display Aging
*	Display Procedure
*	Display Rejection
	Display Patient Location
	Display Patient Provider
	Exact Match
~	Minimize Search
	Patient View
*	Quick Claim View

19. The last area on the second tool bar is the max rows. We recommend you set this to 9999 this way you see all the claim pulled into the billing query.

Max. Rows	g	999	

### **Billing Query Search Overview**

Billing Query Screen Overview

The billing query has several useful functions for the billing department. It has a claim view and a patient view. In this guide we will review the search functions for the billing query.

• In the Billing portal click on Billing Query



• The billing Query screen will pop open.

	Search Criteria	
∃ Patient	Missing Signature	^
Chart #	EOB ID	
First Name	Last Name	
ID	Value	
Employer		
User Defined		
Orig. Chart		
Name Range	Birth	
	{{Hide}}	
∃ Guaranto	or	_
	Missing Guarantor	
First Name	Last Name [Block]	
Paver/Ins	{{more}}	-
,	Missing Insurance	
Fin. Class	×	
Name		
Coverage	×	
ID	Value	
First Name	Last Name	
Policy		
Group		
Plan		~

• When you complete the search, it will hide/ collapse. To open the query again simply click on Search Criteria for it to open again.

• To enter a search, click on more to find hidden criteria available to narrow your search.



Search Criteria

•

•

• You can search by patient information, Guarantor information, Payer / Insurance, Claim information, Procedures, Submission information, Statement numbers, Provider, and Location.

	ocuren ontenu	
ŧ	Patient	~
±	Guarantor	
+	Payer/Insurance	
±	Claim	
+	Procedure	
+	Submission	
±	Provider	
	Location	

Once you have entered your parameters for the search, Click the magnifying glass icon to search and find the claims. You can also use the quick key strokes of CTRL S



•

The query will open to the right.

	#	+	Claim	DOS	Submission	Status	Billing	
	1		32207	06/21/21		Closed - Electronic Superbill	E	
	2		32206	06/19/21		Closed - Electronic Superbill	E	
	3	•	32325	02/07/22		Closed - Electronic Superbill	Е	
	4	-	32267	09/24/21		Open - Electronic Superbill	E	
	5	-	32274	10/12/21		Ready to Send Primary, Electronic	E	
	6	-	32273	10/12/21		Ready to Send Primary, Electronic	E	
	7		32130	02/25/21		Done	E	
	8		32287	11/11/21		Closed - Electronic Superbill	E	
ria	9		32203	06/09/21		Closed - Electronic Superbill	E	
rite	10	•	32335	02/07/22		Closed - Electronic Superbill	Е	
C	11	$\square$	32136	02/26/21		Done	E	

The billing query view default is the claims view. You can then sort the view to patient by going up to the hammer and wrench tool tip and clicking patient view and click the magnifying glass again. Please note if patient view is unchecked then you are in the claim view.

衆	<ul> <li>Max. Rows 9999</li> </ul>			
*	Display Recent Year			
✓ Display Balances				
*	Display Zero Balance			
~	Display Aging			
~	Display Procedure			
*	Display Rejection			
	Display Patient Location			
	Display Patient Provider			
	Exact Match			
~	Minimize Search			
	Patient View			
*	Quick Claim View			

Now you can view patient balances.

ŧ		+	Chart	Name	DOB	Primary ID	Patient Balance	Insurance Balance	Unsubmitted Balance	Total Balance
	1	-	9392	Test, Ellen (Elly)	07/02/1969	123-45-6789	(\$19.31)	\$5,442.79	\$6,877.75	\$12,301.23
	2	-	9486	Test, Charles A. (Tony)	10/14/1967	888-88-8888	\$35.00	\$2,155.00	\$6,431.00	\$8,621.00
	3	~	9565	Test, Jayme	09/10/1975		\$50.00	\$0.00	\$0.00	\$50.00
	4	~	9675	Test, Allergy	01/06/1972	555-55-5555	(\$165.00)	\$550.00	\$1,140.00	\$1,525.00

When in patient view you can also print letters. Go to the patient icon on the second tool bar. Click the down arrow and choose letters.



### **Billing: Claim Refund Status**

Refund claims are claims that have a credit balance. The refund status can be created by either a patient or insurance payment that causes the claim to go into a credit balance. They can be viewed from the Revenue Cycle under Manage. Note:: A Refund status does not mean the refund has been made, only that the claim is in a Credit Balance.



#### How is the Refund status created?

If a payment made to a claim causes an overpayment or refund, the Create Credit screen will appear. The user has the option to create the Credit.

Claim Details	/ for Claim #30967 Webpag	e Dialog			×
Patient 🔳	25063 - Deborah T3st				
Rendering	Blaire Adams ARNP ARNP (144	7485511)			
Insurance 🖉	Credit Entry for Claim #30967	Webpage Dialog		×	
Claim Cl	im Details				F
Damma and D	Claim #: 30967				
Payment D	Patient: 25063 - Deborah T3s	t			0
Ne	w Credit O Create	Credit	x	edit Amount: \$20.00	~
Payme	Claim Status R Are you su	re you wish to create a credit?		mpleted	Post
Adjustme	Refund To Re If you select	t 'No' then this window will close	and no credit will be	~	Clear
Comme	Payment 02 created.			~	Default
Procec	Comment				
DOS			Yes No		nce
05/12/20				- ~	\$20.00)
·					^
			Save	Close	~
<b>.</b>		Procedure Totals: \$1	50.00 (\$220.00)	\$50.00	(\$20.00)
Pay. Comment	Claim Comment <u>H</u> iste	ory Credits	EOB	<u>R</u> efresh	<u>C</u> lose

If the user selects Yes, a claims Details screen will appear to create the New Credit. The user will need to select the potential Refund recipient. The user will then select Save and Close out the window.

Claim #: 30 Patient: 25	967 063 - Deborah T3st		
New Credit		Deposit: 02/10/2022	Credit Amount: \$20.00
Claim Status	Refund	Claim Level	Completed
Refund To	Resp. Party - T3st, Debora	h	~
Payment	02/10/2022 \$-20.00 - Co-P	ay from Deborah T3st	~
Comment			
			*

#### The status of the claim will now reflect a Refund status.

· · · · · · · · · · · · · · · · · · ·	) (72y) - Internet Explo	rer							
Open 🔻 🗟 Save 👻 🎧 History 👻 📩 Payments 💌	🚨 Patient 🔹						5	Search for Patient	9.
Status	Patient					Service			
Claim 30967 -	Patient	25063 - Deborah T3st	•		10	Location	A2255 St Jose	ph Regional Medic	a 🔍
Status Refund 🗸		(205) 542-9078	acham Al	25200		Rendering	Adams ARNP,	Blaire	Q
Substatus V	Pat. Location	Patient Location	ignam AL	. 35200		Referring	Referring Provi	ider	Q
Level Completed V Billing Paper V	Pat. Provider	Patient Provider		) (	2		Re	eferred	
Type Medical V	Resp. Party	T3st, Deborah		1	2	☆ Other Pro	viders		
Owner Smith, Staci	Primary	(1) Anthem Blue Cross	s		2	Alternate	Alternate Provi	der	Q
837   Professional  Institutional	Secondary	Secondary Insurance	2	. (		Supervising	Supervising Pr	ovider	Q
0	Tertiary	Tertiary Insurance		. (		Ordering	Orderina Provi	der	Q
	Override	Insurance	18 Aut	orizati		Attending	Attendina Prov	ider	Q
		liisulance	≝° Auu	10112.00		Durahaaing	Durchesing Dr	wider	0
From         To           1         05/12/2020 ♀         05/12/2020 ♀         99213         99           2         05/12/2020 ♀         05/12/2020 ♀         1         1	Units         Charg           1.00         \$1	e Amount 150.00 \$150.00 \$0.00	0	2	3 4	1 j120 i120	2	3	4
Add New Item	Massagas and	Monitoring	Total: \$	150.00	Pay/A	lj: (\$170.00)	Balance: (\$20.)	00) Receipts: \$	0.00 •
	Messayes and	monitoring				There is cu	asking mently nothing in	the Queue for this	claim
	Billing Message					There is do	nonny nonnig m	the queue for this	Giann
Discharge Hour	Claim Validation	· ·							
Initial	Patient Validatio	אר 🗙							
Initial S	Patient Validation Patient Only	N/A							
Initial	Patient Validation Patient Only Code Limitation	n X N/A s N/A							
Initial Current Claim Edits	Patient Validatic Patient Only Code Limitations Required Fields	n X N/A s N/A N/A							
Initial	Patient Validation Patient Only Code Limitation: Required Fields Global Period 837 Validation	n × N/A s N/A N/A N/A							
Initial	Patient Validation Patient Only Code Limitation: Required Fields Global Period 837 Validation Monitoring	on X N/A s N/A N/A N/A X N/A							

For assistance on how to apply a Refund to a claim review the Apply a Refund to a Claim Credit document. Refunds can also be reviewed utilizing the Refund Report.

### **Billing: Claims Search from Billing Query**

## **Claims Search from Billing Query**

A single claim or multiple claims can be found using the Billing Query search window.

• Click on Billing



• Go to the Billing Query search window.



• Any number of parameters can be used to search for claims and some areas have a {{More}} button to open additional search criteria:

In this example Chart#, patient name, date of birth can be utilized

	x
[	Missing Signature
EOB ID	
Last Name	
	{ <u>{{More}}</u>
	EOB ID Last Name

• Note that areas can be collapsed and opened by toggling the + or - symbol

Patient	
Chart # First Name	
⊕ Guarant	or surar

 To search for all claims from a particular payer navigate to the Payer/Insurance fields, enter the Payer name:

🖃 Payer/In	surance		x
			Missing Insurance
Fin. Class			*
Name	Medicare		×
Coverage	_	*	
ID		Value	
First Name		Last Nam	ie 🗌
Policy			
Group			
Plan			
Employer			Company
			{{Hide}}

• Under Claim multiple statuses can be selected:



- There are sections for Procedures, Providers and Locations as well.
  - For Provider searches, there's a dropdown for different types of providers:

Provid	er	Missing Rendering Provider
Provider	Provider	0
✓ 186	Lynch MD, Stephanie	Rendering V
298	Test MD, John	Rendering Referring Alternate Supervising Ordering Attending Purchasing Patient
Rend. NPI		(filida)

• Once all criteria is entered, from the upper left corner use the magnifying glass to search and the chalk symbol will clear all input to begin a new search:



• When the search button is selected, the Billing Query window collapses. To return to the Billing Query search window again, click the vertical Search Criteria bar:



### **Patient History**

# **Patient History**

The **History** chart tab is used to capture a patient's past medical, family and social history. It is a "historical" chart tab where data remains as last edited from encounter to encounter.

• Open patient chart in EMR- select History Chart Tab



• Document patient's History by clicking appropriate items based on your practice's History template

New	💾 Save	<b>O</b> History	-	Defaults	🗮 Patient 🔹	••• More	•			
Review	ved				· · · · ·					
Summary										
				F	Past Medical His	tory			•	
				Prev	entative Care Sc	reening			•	
				Pre	vious Diagnostio	: Tests			•	
					Previous Treatm	ent			•	
					Social History	/			•	
					Surgical Histor	r <b>y</b>			•	-
					Hospitalization	18			-	-
				5.	Allergies	-4			• •	-
			Fa	T	Mother	story	Brother	Sister	Δ	-
Alzheimer	's/ Dementi	a		]		1				
Asthma				]		Ī				
Bleeding/0	Clotting			]		[				
Breast Ca	ncer			]						
Colon Car	Colon Cancer									
COPD				]		L	-			
Click Sa	<b>ve</b> when	documer	tatio	' n is con	nnlete	1	I	1 1		
						1				
New	💾 Saye	Itistory	-	Defaults	E Patient 🔻	••• More	•			
Reviewed W										
	Summary									
Past Medical History:						~				
<ul> <li>Asthm Preventat</li> </ul>	Asthma Diabetes Ulcers Preventative Care Screening									
Colon	Colonoscopy: 04/02/2019, results normal									
<ul> <li>Social His</li> <li>They is</li> </ul>	Social History:     They is retired. No military service.					5				
<ul> <li>The particular</li> </ul>	atient is mar	ried.		مراحا والمراج	1 # 42 de					Ť
1					Past Medical H	listory				•
✓ Preventative Care Screening							•			
Previous Diagnostic Tests							•			
Previous Treatment							•			
✓ Social History							•			
Surgical History								-		
	Hospitalizations							-		
	Allergies							-		
1	Family Medical History									

•

• Subsequent visit- update changes to History, mark Reviewed, then click Save



### Patient History - Uncategorized Data

## **Understanding Uncategorized History Items**

To ensure all selected history items remain visible, practice users should always document a patient's history using the designated **Practice History Template**.

When a user documents history on a template **not used by other practice users**, history items may appear in the **Preview** section as **"Uncategorized."** 

- Why does this happen? The uncategorized label appears because the items do not exist in the template being used to view the patient's data.
- How to resolve this? Switch your user view to the correct **Practice History Template** to ensure all history items are properly categorized.

### Look Back Feature to See Dropped Uncategorized Data

If using more than one history template then your history data could be **out of sync**, and some history items may have been inadvertently deleted. You would know this was occurring because you would see Uncategorized data and when you saved the history - those items would just drop out of view. To address this, we have implemented a **look back feature** that allows users to view and manually restore deleted history items.

This feature was necessary to correct a bug in our system where:

• Previously, if a user **viewed uncategorized history but took no action**, OfficeEMR automatically **removed** those items from view and placed them in the **patient's history audit log**.

• Now, uncategorized history remains visible until a user actively and intentionally updates the history item.

### **Using the Deleted History Lookback Feature**

If your practice has more than one history template in use (uncommon), follow these steps to restore deleted history:

#### Step 1: Enable Access to the Lookback Feature

- An admin must grant your user account the Role: Uncategorized History Deletion.
- By default, this role is turned off for all users.



#### **Step 2: View Deleted History Items**

- Once the role is enabled, navigate to the patient's chart and access the History section.
- A one-time pop-up window will appear, displaying any Deleted History items found in the patient's audit log.

#### **Step 3: Determine Next Steps**

• If the **Deleted History window displays "No deleted history,"** there are no missing history items, and you can simply **close** the window.



• If **deleted history items are displayed**, compare them with the **patient's current history** and manually **update** their record as needed.

🛆 • EMR C4699 QAs 💍 🖄 🕸 🖓 🧿								00	
« Patient Charts 🔚 •	🕐 New 🕐 Save 🕐 History * 🕒 Defaults 🔛 Patient * *** More *	1 18 19	2 20 21 3 4 5 6 8 9 CMT 🜲 mr 🛓 🚨 😤 Th 🐲 a	abc car efg lko roh roi RO	🚱 tes 🧏 📕 i 🍉 2	76746-Ahmed,	Saif 25-S	ep-1993/	(31y) of
Office Schedule	Reviewed					Search to	Patient	2	×Qv
Wednesday Feb 5, 2025	Summary					Patient P	hotograph		<b>\$</b> \$
Multiple Resources (15)	Invateration - Part Medical History - Honorlegation	S Patient Deleted History - Chart #2	16746 Boogle Chrome		- 0 X	Patient A	MP		<b>\$</b>
Ahmed, Salt (31v) 88 ctl 4	Uncategorized - History - Surgeries - 1	Re				Maller 🕺	gles 🗸		
10:30AM - 10:45AM	Uncategorized - Past Medical History - Adominal Actic Aneurysm     Uncategorized - Past Medical History - Allergic Rhinits	<ul> <li>qatestisalusneaitnoi</li> </ul>	are.com/Oncemo/app/reporting/PatientDeletedPistory/276746/111650			S Medi	cations	~	
Abmed, Self (31v)	Uncategorized - Past Medical History - Chronic Sinusitis     Uncategorized - Past Medical History - No Significant Past Medical History	276746-Ahmed, Saif 0	9/25/1993			Prob	dems ~		
11:15AM - 11:30AM	<ul> <li>Uncategorized - Social History - Alcohol Consumption - Specified Current Status (Current/Former/Never)47498144/current</li> <li>Uncategorized - Social History - Tobacco Lize - Specified Stroking Status (our ARRA Guidelized)47/Never stroker</li> </ul>					Rest	ilts 🗸		
Alexandro Martine and all	Uncategorized - Past Medical History - Carolid Stenosis     Deater Medical History - Carolid Stenosis	Alias	Description	Original Value	Removal Date	💝 Vitalr	s ^ _		
11:30AM - 11:45AM	Uncategorized - History - Social - Specified Exercise - None		History - Hypenension: History - Hypenension History - Rumerice - 1 History - Rumerice - 1	T tost	32/11/2025 9:20AM (CDT)		08-29	08-28 0	07-15
Heintein MD, Alex	Uncategorized - History - Social - Specified Exercise - Occasional     Uncategorized - History - Social - Current Living Anangements - Home with assistance		Past Merical History - Ahdominal Antin Aneurosm-Past Medical History - Ahdominal	1044	2011/2020 020000 (001)	Bloo	d -/-	-/-	-1-
Ahmed, Saif (31y) XX O	Uncategorized - History - Past Medical History - Coronary Artery Disease		Acrtic Aneurysm	Y	J2/11/2025 9:20AM (CDT)	R			
Heinlein MD, Alex	Uncategorized - History - Past Medical History - Neurolic - Headache - Dropdown- ^A		Past Medical History - Allergic Rhinitis Past Medical History - Allergic Rhinitis	Y	02/11/2025 9:20AM (CDT)	H	5'0	5'8	53
Ahmed, Salf (31y) XX O	Uncategorized - History - Past Medical History - Reviewed		Past Medical History - Chronic Sinusitis Past Medical History - Chronic Sinusitis	Y	J2/11/2025 9:20AM (CDT)	Wt	400	400	400
Heinlein MD, Alex			Past Medical History - No Significant Past Medical History Past Medical History - No Significant Past Medical History	Y	02/11/2025 9:20AM (CDT)	DM	76.11	60.01	78.85
Ahmed, Salf (31y) ×× 0			Past Medical History - Carotid Stenosis:Past Medical History - Carotid Stenosis	Y	02/11/2025 9:20AM (CDT)				
Heinlein MD, Alex			Past Medical History - Chronic Ischemic Heart Disease:Past Medical History - Chronic Ischemic Heart Disease	Y	02/11/2025 9:20AM (CDT)				
Clark, test (60y) XX O			History - Social - Specified Exercise - None History - Social - Specified Exercise - None	Y	02/11/2025 9:20AM (CDT)				
Davis DPT, Kinsey			History - Social - Specified Exercise - Occasional:History - Social - Specified Exercise - Occasional	Y	02/11/2025 9:20AM (CDT)				
Sinsching, Enzo (10.11y) XX O 3:15PM - 3:30PM	Suraical History A		History - Social - Current Living Arrangements - Home with assitance History - Social - Current Living Arrangements - Home with assitance	Y	02/11/2025 9.20AM (CDT)				
Onetwentyone, Mmiweb X X C	No surgical procedures		History - Past Medical History - Coronary Artery Disease:History - Past Medical History - Coronary Artery Disease	Y	02/11/2025 9:20AM (CDT)				
4:00PM - 4:15PM Davis DPT, Kinsey			History - Past Medical History - CHF: History - Past Medical History - CHF	Y	02/11/2025 9:20AM (CDT)				
O'Test, Auto (24y)			History - Past Medical History - Neurolic - Headache - Dropdown:History - Past Medical History - Neurolic - Headache - Dropdown	14263195	02/11/2025 9:20AM (CDT)				
Smith MD, Lane C.			History - Past Medical History - Reviewed:History - Past Medical History - Reviewed	Y	02/11/2025 9:20AM (CDT)				
Release 21.08 54						Chart Tab	16		<b>\$</b> \$
Davis DPT, Kinsey						History	/		
David, Cliff G. (50y) XX C						SOAP N	otes		
7.00PM - 7.00PM						Vitals			
Clark test (500 XX ell						ROS			
8:30PM - 9:00PM						Immuniz	ations		
Smin MU, Lane G.						Exams     Dypherr	1.00		
OneTwentyEight, Twent X X Q 10:00PM - 10:30PM						Order Er	stry		
Smith MD, Lane C.						Suresoria	pts Record L	locator	

#### **Step 4: Accessing Deleted History Later**

- If you closed the Deleted History window but need to access it again, simply:
  - Click on the white space to the right of the History template data.
  - Select Deleted History to reopen the Deleted History screen.



This process ensures accurate documentation of patient history while preventing unintended data loss.

### **Billing: Claim Status Definitions**

#### What are Claim Statuses?

Claim Status helps a user to know what needs to be done with a claim or what has been done with a claim. Claim Statuses should be used to assist a user with the work flow of claims.

**NOTE**: It is ultimately up to the user to make sure that they are working their aged claims appropriately and not focusing just on claim status alone when working claims.

#### How do I change a Claim Status?

A claim status is changed from within the Claim Entry screen, in the upper left-hand corner:

▲ Status		Patient	
Claim	40185 •	Patient	23641 - Katie S. Archie TEST 👻
Status	Transferred to Billing		(601) 500-1023 573 Yandell Rd Canton MS 39046
Substatus	~	Pat. Location	Patient Location
Level	Primary V Billing Electronic V	Pat. Provider	Patient Provider
Туре	Medical 🗸	Resp. Party	Archie TEST, Katie S.
Owner	Martin, Murphy	Primary	(1) Medicare Advantage Wellcare
837	Professional Institutional	Secondary	(2) Medicaid Of MS SKMS0

#### What Claim Status options are available?

There are four different types of Claim Status available: *System Status*, *Biller Defined Status*, *Submitted Status*, and *EMR Status*.

System Status: These are statuses that will typically be assigned to the claim as the claims are processed.

- **Done** This status means that the claim is completed. This status should only be used when the claim has a zero balance.
- Ready to Send Primary, Electronic This status means that the claim is ready to be sent electronically to the primary insurance.
- Ready to Send Secondary, Electronic This status means that the claim is ready to be sent electronically to the secondary insurance.
- Ready to Send Tertiary, Electronic This status means that the claim is ready to be sent electronically to the tertiary insurance.
- Ready to Send Primary, Paper This status means that the claim is ready to be sent on paper to the primary insurance.
- Ready to Send Secondary, Paper This status means that the claim is ready to be sent on paper to the secondary insurance.
- Ready to Send Tertiary, Paper This status means that the claim is ready to be sent on paper to the tertiary insurance.
- Ready to Send, Statement This status means that the claim is ready to be billed to the responsible party using a statement.
- Sent, Statement This status means that the claim has been billed to the responsible party using a statement. The status of the claim will be automatically updated to this status when a statement has been prepared and processed for the claim..
- Sent, Electronic This status means that the claim has been sent electronically to an insurance. The status of the claim will be automatically updated to this status when the payer acknowledges receipt of receiving the claim electronically.
- Sent, Paper This status means that the claim has been sent on paper to an insurance. The status of the claim will be automatically updated to this status when a paper claim has been prepared and processed for the claim.
- Refund This status means that the claim has a refund (credit) balance.
- **Rejected** This status means that the claim has failed Billing validations, has been rejected by the clearinghouse, or has been rejected by the payer.

*NOTE*: The **Ready to Send** statuses are the default status when a claim is entered manually by a user, rather than through the EMR Superbill. However, an EMR status may switch to a **Ready to Send** status based on how the claim is being worked.

**Biller Defined Status**: These statuses are user statuses, and only a user can change the status of a claim to one of these statuses. These statuses are not system assigned (except in one circumstance). NOTE: Biller Defined Status does not indicate that a new status can be added. It indicates that it is a status that is not automatically assigned by the system.

- Appeal Use this status to indicate that the claim is being appealed.
- Collection Use this status to indicate that the claim has been sent to collections.
- **Crossover** Use this status to indicate that the claim has been crossed over to the secondary payer by Medicare. (This is the one exception; if you are receiving ERAs the system will update a claim to this status automatically upon batch disbursement if the ERA notified us that the claim was crossed over.)
- In Progress Use this status to indicate that the claim is in progress.
- Info. requested from office Use this status to indicate that information has been requested from the provider's office for the claim.
- Hold Use this status to indicate that the claim is on hold.
- Return Mail Use this status to indicate that the claim has been returned via mail.
- **Pending Collection** Use this status to indicate that the claim is currently pending review before being sent to collections.

Submitted Status: These statuses are to show the progress of the claim filing.

- In process step 1, Electronic This status means that the claim has just been prepared.
- In process step 2, Electronic This status means that the claim has been prepared and is waiting to be processed from Claim Submission, or that the claim has been prepared and processed and is waiting for acknowledgement by the clearinghouse.
- In process step 3, Electronic This status means that the claim has been accepted by the clearinghouse and has been forwarded on to the payer electronically.
- In process step 1, Paper This status means that the claim has just been prepared.

- In process step 2, Paper This status means that the claim has been prepared and is waiting to be processed from Claim Submission.
- In process step 1, Statement This status means that the claim has just been prepared.
- In process step 2, Statement This status means that the claim has been prepared and is waiting to be processed from Claim Submission.

*NOTE:* Claims begin aging when they reach status **In process - step 3, Electronic**. Some payers do not send back an acknowledgement when claims are received; therefore claims in this status are not

"stuck" but should be worked in a manner equal to claims in a Sent Electronic status.

EMR Status: These are the statuses set when a claim has been created via the electronic superbill in the EMR.

- **Open Electronic Superbill** This status means that the claim has been created via an electronic superbill and that the superbill has not yet been released to be processed.
- **Closed Electronic Superbill** This status means that the claim has been created via an electronic superbill and that the superbill has been released for processing.

## Billing: Check enrollment via Change Healthcare

How to view your enrollments status in Change Healthcare.

1.Log in to : Portal.capario.net

2.Got to Tools and Setup



3. Click the down Arrow next to tools and setup and choose existing enrollments.



## 5. View all your enrollments

6. You will then be able to see the status.

Payer Name	Pyr. ID	Тх Туре	Account	BP Name	BP NPI	Checkpoint	Status
Blue Shield - Utah (Regence	BS088	Prof. Claims	52111292	Utah Endocrinology Associ	1417121609	Enrollment Approved	Approved

## Redacting Financials From the EMR Superbill Tab

On occasion a practice may want to redact financials from the EMR Superbill tab.

Follow the steps below to change the user setting.

User Setting: Display Amounts within Superbill

If checked, the **charges**, amounts and totals will be displayed on the EMR Superbill. This setting can be found in the User Settings window under Superbill Settings->Display Amounts within Superbill.

If the setting is checked, then the user can see the charges. If the setting is unchecked as "NO"



When unchecked the Superbill EMR tab will view like this.



## How to Null a claim

FAQ: How do I delete a claim?

It is not possible to '**delete**' a claim. However, you can 'clear' a claim so that there are no charges/procedures associated with that claim number. To do so, please follow these steps:

- 1. Open the claim to be cleared.
- 2. View the Patient Transaction History and make sure there aren't any payments applied to any procedure lines. If there are, you will need to right-click and **delete** them.
- 3. In the Quick Claim window, right-click in the Procedure Code box and select **Delete**. In the Claim Detail window, click into the Procedure Code box and then press ALT-R on your keyboard.
- 4. Repeat as needed for all procedure lines.
- 5. Change the Claim Status to Done, and Save the claim.

If you have followed this process and are unable to remove line items, please contact the Support Team with the claim number and additional information so that we may look into the problem.