

Patient Cost Estimator Setup

Last Modified on 02/20/2024 9:37 am EST

Below you will find an explanation for each company setting and rule along with the default values that are applied. These settings and rules will affect exactly how estimates are created.

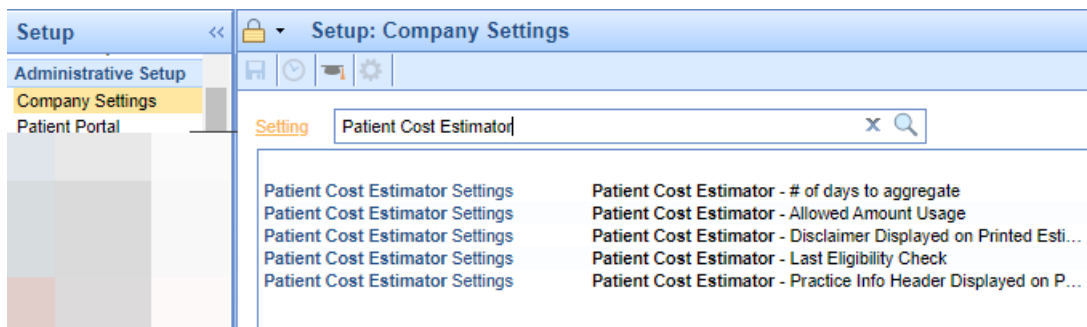
As a practice, you will be responsible for updating these settings to meet your business rules.

Company Settings

Company Settings allow customization to Patient Cost Estimator specific to your practice needs. There are four settings specific to this setup.

- Navigate to Setup > Administrative Setup > Company Settings > Search Patient Cost Estimator > Select item to open and set parameters

It will be necessary to use this search 5 times to look at each.



- **Patient Cost Estimator - # of days to aggregate**
 - Description: This company setting will be used to determine how many days in the past to look back for payments in order to calculate the aggregated allowed amount for estimates. (This setting is only applicable if the Allowed Amount Usage setting is set to "Payment Aggregate Allowed Amount")
 - Options: 1-365 days
 - Default Value: 365 Days
- **Patient Cost Estimator - Allowed Amount Usage**
 - Description: This company setting will be used to determine the dollar amount used by the estimator.
 - Options: 0 = Payment Aggregated Allowed Amount, 1 = Fee Schedule Allowed Amount
 - Default Value: 0

Setting	Patient Cost Estimator - Allowed Amount Usage
Value	0
Rule	Integer value between 0 and 1
Tool Tip	0 = Payment Aggregated Allowed Amount, 1 = Fee Schedule Allowed Amount.

- Business Use Case and Recommendation: **Payment Aggregated Allowed Amount** is the average payment for that procedure from the specific payer within the last year. **Fee Schedule Allowed Amount** is listed in the Procedure Code Setup screen under the Fees tab.

- **Patient Cost Estimator - Disclaimer Displayed on Printed Estimate**

- Description: This company setting will determine the disclaimer displayed at the bottom of printed estimates. Text is limited to between 1 and 600 characters.
- Default Value: "The above is only a good faith estimate based on the best information known and provided at the time of the estimate. The scope of services may change based upon the patient's needs at the time of service, which will inadvertently affect the amount owed. The patient must be eligible for benefits at the time of service with the above insurance plan. This is an Estimate only and benefits will be determined at the time the claim is processed."

Setting	Patient Cost Estimator - Disclaimer Displayed on Printed Estimate
Value	The above is only a good faith estimate based on the best information known and provided at the time of the estimate. The scope of services may change based upon the patient's needs at the time of service, which will inadvertently affect the amount owed. The patient must be eligible for benefits at the time of service with the
Rule	Text Area between 1 and 600 characters
Tool Tip	Disclaimer displayed in footer of printed estimate

- **Patient Cost Estimator - Last Eligibility Check**

- Description: This company setting will be used to determine the timeframe of the last eligibility check to use for estimates.
- Options: 0 = Current Month, 1 = Last 15 Days, 2 = Current Date
- Default Value: 0

Setting	Patient Cost Estimator - Last Eligibility Check
Value	0
Rule	Integer value between 0 and 2
Tool Tip	0 = Current Month, 1 = Last 15 Days, 2 = Current Date.

- Business Use Case and Recommendation: This setting allows for customization per practice for utilizing the last eligibility file for the current estimate. For some it may be more beneficial to use one over another depending on patient population. Some insurances have more frequent changes than others.

- **Patient Cost Estimator - Practice Info Header Displayed on Printed Estimate**

- Description: This company setting will be used to determine practice information displayed at the top of printed estimates.
- Options: 0 = Company Profile, 1 = Service Location on Estimate, 2 = Rendering Provider on Estimate
- Default: 0

Setting	Patient Cost Estimator - Practice Info Header Displayed on Printed E
Value	0
Rule	Integer value between 0 and 2
Tool Tip	0 = Company Profile, 1 = Service Location on Estimate, 2 = Rendering Provider on Estimate.

Setup Portal

The following setup options will be necessary to the building of **Patient Cost Estimator** for your specific practice.

- **CPT setup screen**

- Description: This setup will add Fees and Allowed Amounts for individual CPT codes.
- Path: Setup > Billing Setup > Procedure Codes > Search Procedure Code and select > Navigate to Fees tab

- Business Use Case and Recommendations: In order to properly include your practice's Allowed Amounts and Fees for specific procedures fields used to build estimates, maintaining updated Fees and Allowed Amounts are necessary.

- **Assign CPTs to Appointment Types**

- Description: This setup will be used when selecting an Appointment Type in the Patient Cost Estimator.
- Path: Setup > Schedule Setup > Appointment Types > Select Appointment Type to modify > Assign CPT under Superbill Additions

- Business Use Case and Recommendations: This is the CPT to be used for that specific Appointment

Type when using this for Patient Cost Estimator.
