

## Scheduling - Call Reminders



### Call Reminders, Daily

- Patient call reminders are generated to remind patients of their upcoming appointments. They can be printed, or you can create an electronic file which is sent to IMS Pro for automatic calling.
- In the **Provider/Team** menu for a rendering provider, go to the **Preferences** tab, **Provider** tab to fill in the “Preferred Name” field. This field is used to indicate how to pronounce the name of the provider as they would like it to be announced in reminders.

A screenshot of the Easy\_Billing Professional software interface. The top navigation bar shows "Provider / Team" and a user profile for "Obrien, Sharon, PT". Below this is a series of tabs: Name, Contact, Qualifier Codes, Preferences, Access (highlighted in red), Appointments, Work List, Contracts, Patients, and Ledgers. Under the "Access" tab, there are sub-tabs: Place, Provider (selected), Printing, Claim, Status, Path, Calendar Filter, Schedule Event, Visual, and Task. A dropdown menu is open under "Narrow by Status ... Then select from list", showing options:  Active,  Alert,  Collection,  Deceased, and  Inactive. Below the dropdown are two selection fields: "Select a Rendering Provider" and "Select a Referring Provider". At the bottom, there are two text input fields: "31. Signature on File" with the value "Sharon Obrien DC" and "Preferred Name" with the value "Doctor Sharon Obrien". A small note below the Preferred Name field says "( how you would prefer to be addressed in reminders )".

- From the **Scheduling** menu, click the **“Enter an Appointment”** button.

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Enter an Appointment

- On the **Day** view, click the **Patients** tab.

The screenshot shows the 'Appointment Reminder' interface. At the top, there are tabs: Dual, Multi, Slots Wide, Slot Narrow, Appt / Time, Appt / Prov, List, X-W Slot, Overview, and Patients. Below these is a 'Create' button with a clock icon and the text 'Appointment Reminder ( P = Phone | E = Email | T = Text )'. The main area is a table with columns for 'Primary' and 'Secondary' reminders. Each column has sub-columns for 'Option to Check' and 'Date Last Checked'. Below these are 'Eligibility Status' and 'Date Last Checked' columns. The table lists three patients: Anderson, S., Cassidy, S., and Munster, H. Each patient row has a blue arrow icon on the left and three reminder options (P, E, T) on the right. The 'Eligibility Status' column shows a green 'X' for Anderson and Cassidy, and an empty cell for Munster.

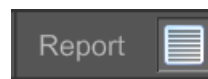
Patient Query Eligibility Check Setup	Primary			Secondary			P	E	T
	Option to Check	Date Last Checked	Eligibility Status	Option to Check	Date Last Checked	Eligibility Status			
Patients with Events									
Anderson, S.			X				P	E	T
Cassidy, S.			X				P	E	T
Munster, H.							P	E	T

- Reminders can be selected by phone, email or text before the report is created.
- Click the icon labeled "Create" to generate a processing event.
- In the Process Builder, you can look at the information on the **Appointments** tab, or the **Patients** tab. You can remove empty records by clicking the light orange box to the right, which indicates an empty patient name on that record.

The screenshot shows the 'Process Builder' interface. At the top, there are tabs: Elec Claim Filing, Elec Claim Receiving, HL7, Statements, Superbill, CMS, Diag, Let / Hdr, Cust. Form, Collections, Eligibility, and Reminder. Below these is a 'Type Appointment Reminder' dropdown, a 'Date' field set to 05/19/2011, and a 'A276' field. The main area is a table with columns for 'Appointment / Schedule Event', 'Event Color', 'Type Color', 'Provider / Team Colors', 'Report', 'File', 'Cat. Color', and 'P = Phone E = Email T = Text'. The table lists four appointment reminders for Tuesday, Jan 25, 2011, at 11:00 AM and 01:00 PM. Each row has a blue arrow icon on the left and three reminder options (P, E, T) on the right. The 'Event Color' column shows a green bar for the first three rows and a yellow bar for the last row. The 'Type Color' column shows a green bar for the first three rows and a yellow bar for the last row. The 'Provider / Team Colors' column shows a yellow bar for the first row and a green bar for the last three rows. The 'Report' column has a light orange box labeled 'Remove Empty' for the first row and a green bar for the last three rows.

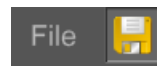
Appointment / Schedule Event	Event Color	Type Color	Provider / Team Colors	Report	File	Cat. Color	P = Phone E = Email T = Text
Tue, Jan 25, 2011 11:00 AM			Istrator, A.	Remove Empty			P E T
Tue, Jan 25, 2011 11:00 AM			Anderson, S.				P E T
Tue, Jan 25, 2011 11:00 AM			Cassidy, S.				P E T
Tue, Jan 25, 2011 01:00 PM			Munster, H.				P E T

- You can generate a report by using the Report icon.



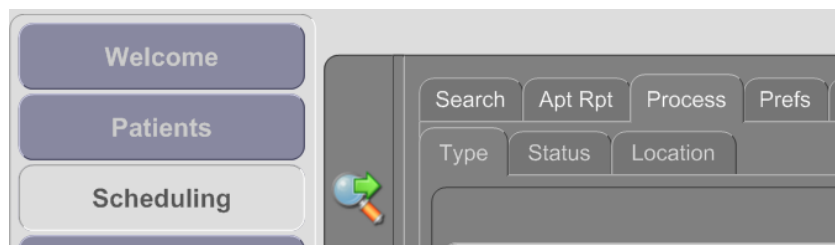
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- Click the gold disc to create a file to send electronically to IMS Pro.

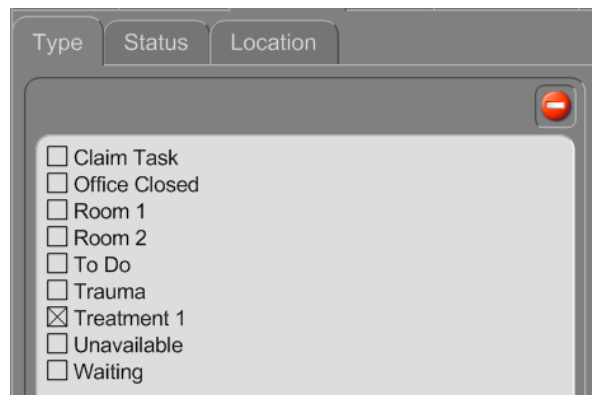


### Call Reminders, by Date Range, Type Status and Location

- Go to the **Scheduling** menu and select the **Process** tab.

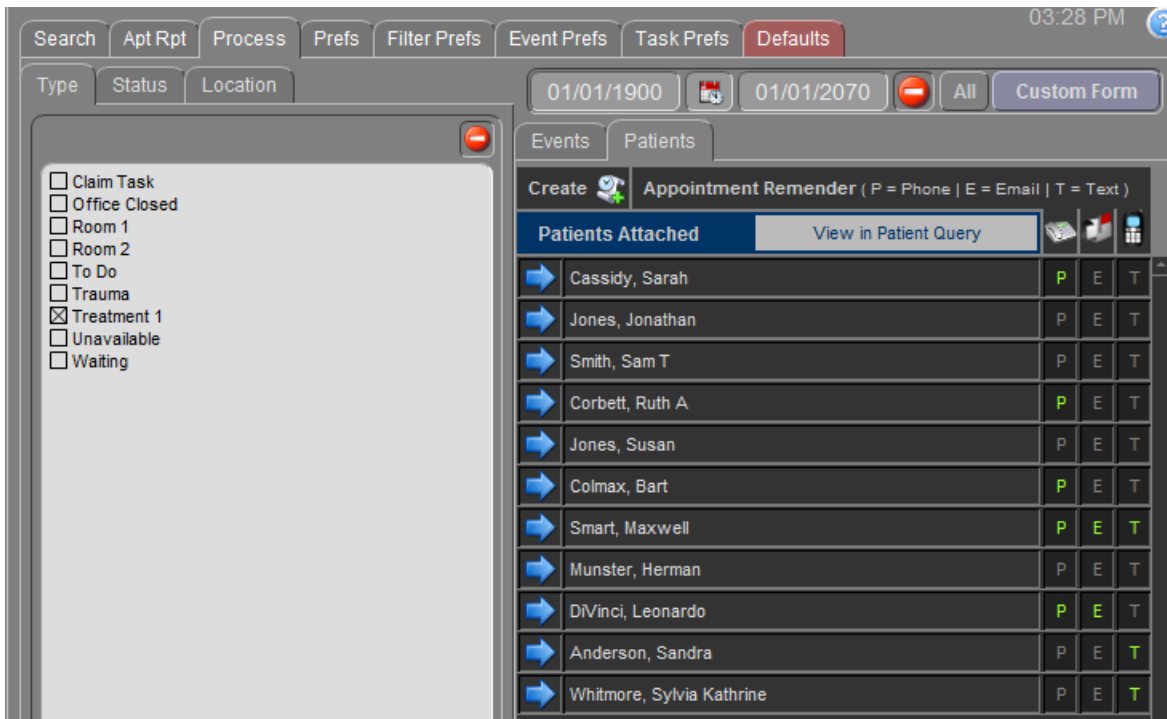


- Choose the "Type", "Status" and "Location" to filter the appointment reminders.



- Select a Date Range. Click on the date selector to select a date range, for example, Monday through Friday for a full week's appointments.
- The letters "P", "E" and "T" when highlighted in a light green indicate the method with which the patients prefer to be contacted. You can select phone, email or text for each patient by clicking "P", "E", or "T" next to each name.

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- You can also view and edit the preferred contact method on the Patient query screen, **SCH** tab.

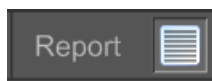
PT	FIN	BAL	MED	INS	TR	TRK	SCH	RPT	STA	LGL	MRK	CAR	ENH	SOF	STS	AUX	HL7
Eligibility Chk. Date		L	06/09/2011		Event Date		L			Status				Appointment Reminder			
		H	06/09/2011		H				Type				P = Phone				
Last Transaction		Eligibility		Request		Category											
8		Default Provider		Primary Eligibility		Secondary Eligibility		Tertiary Eligibility									
	06/09/2011	O'Brien, S., PT		06/09/2011				X						P		E T Card	
	09/24/2010	Maulder, K., MD												P		E T Card	
	10/15/2009	O'Brien, S., PT		06/09/2011		Check		X						P		E T Card	
		O'Brien, S., PT												P		E T Card	
	05/05/2011	Maulder, K., MD		06/09/2011				X		12/07/2010		Check		P		E T Card	
	03/21/2010	O'Brien, S., PT		06/09/2011		Eligible		X						P		E T Card	
	09/28/2009	O'Brien, S., PT		06/09/2011		Eligible		X		06/08/2011		Check		P		E T Card	
	03/30/2010	Smart, G., MD		06/09/2011		Eligible		X						P		E T Card	
	01/25/2011	Smart, G., MD		12/09/2010		Expired								P		E T Card	
	02/18/2011	Whitmore, S., MD												P		E T Card	


- Click the icon labeled "Create" on the **Patients** tab to generate a processing event, which will bring up a list of claim processing events that have appointment reminders associated with them.
- In the **Process Builder**, you can look at the information on the **Appointments** tab, or the **Patients** tab.

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Appointment / Schedule Event		Event Color	Type Color	Provider / Team Colors	Report	File	Cat. Color	P = Phone E = Email T = Text
Date	Time	Patients	Remove Empty	Provider / Team	Remove Empty			
Tue, Jan 25, 2011	11:00 AM			Istrator, A.				P E T
Tue, Jan 25, 2011	11:00 AM	Anderson, S.		Maulder, K., MD				P E T
Tue, Jan 25, 2011	11:00 AM	Cassidy, S.		Obrien, S., PT				P E T
Tue, Jan 25, 2011	01:00 PM	Munster, H.		Smith, Z., M.D.				P E T

- You can remove empty records by clicking the light orange box to the right, which indicates an empty patient name on that record. Even though this event is within that date range, there is no point in sending out an appointment reminder for an appointment with no patient. You can quickly remove this event from the list by clicking the orange button, or if you have several events with empty Patient names, you can click the “**Remove Empty**” button at the top of the “Patients” column to remove all of the items which do not have patients linked.
- From this list you can generate a report which you can use as a call list for your staff to make appointment calls to the patients by using the Report icon.



- You can also build an electronic file. Click the gold disc  to create a file to send electronically to IMS Pro, or any service which is handling your call reminder process.
- All of these appointment reminders become claim processing events that are tied to the patient. So when you go into a patient’s **Processing** tab on the **Patient** menu, you will see the appointment reminder in the patient’s list of processing events. Thus, you will know they have been reminded.

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- The “Default Statement Path” must be set in the Provider / Team preferences for a logged in user in order for the electronic file to be created.

The screenshot shows a software interface for managing provider preferences. At the top, it says "Provider / Team" and identifies the user as "Obrien, Sharon, PT". Below this are several tabs: Name, Contact, Qualifier Codes, Preferences, Access, Appointments, Work List, Contracts, Patients, and Ledgers. The "Access" tab is currently selected. Underneath, there are more specific tabs: Place, Provider, Printing, Claim, Status, Path, Calendar Filter, Schedule Event, Visual, and Task. The "Path" tab is active, showing two sections: "Default Statement Path" and "Default 837 Path ( Outbound )". Each section has a "Fix Path" button and a list of folder options: Documents, Desktop, FileMaker, and Temp. The "Default Statement Path" field is currently set to "/C:/Users/Admin/Desktop/".