

EB Pro Provider Team Status



Provider Team Status

Status selections are used for doing more refined but quicker searches and are all manually added or updated.

Patient Menu
search screen

The screenshot shows a 'Patient Search' window with a 'Guarantor Search' tab. Under the 'Patient Status' section, there are two buttons: 'All' and 'X'. Below these are several checkboxes for status selection: Active, Alert, Collection, Deceased, Inactive, and Patient Credit.

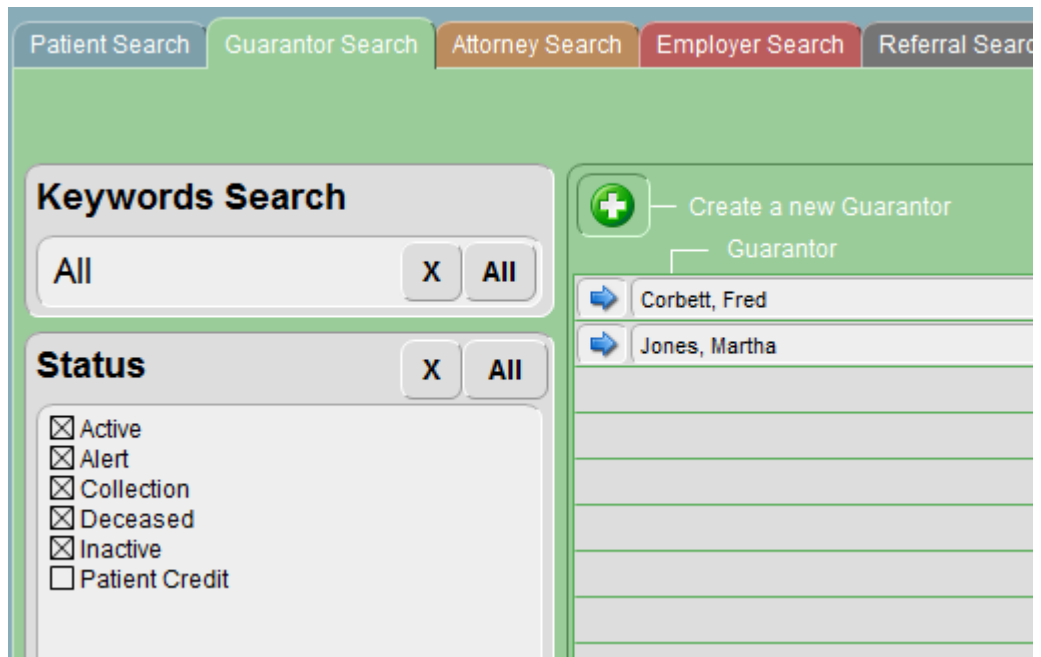
Patient
Information
screen

The screenshot displays the 'Patient Information' screen for 'Corbett, Ruth A'. At the top, it shows 'PAA6' and a 'Balance' of '553.00'. Below this is a navigation bar with tabs for 'Information', 'Insurance', 'Guarantor', 'Attorney', 'Employer', 'Referral', 'Appointments', 'Claim Ledger', 'Transaction Ledger', and 'Processing'. The main form contains the following fields:

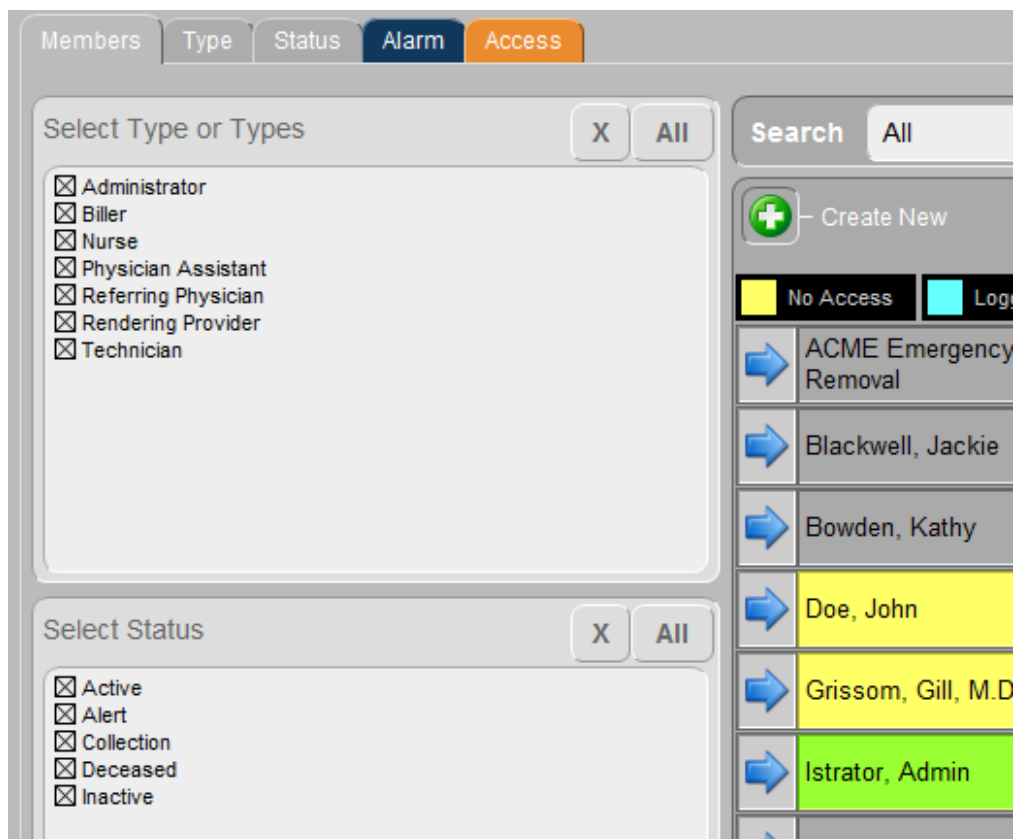
- 2. Name:** Prefix, First (Ruth), Middle (A), Last (Corbett), Suffix.
- 5. Address:** 355 Tiler Rd, Santa Fe, NM, 87505.
- Phone Numbers:** H. Ph. (505-213-3216), Wk. Ph., Cell Phone, Fax.
- 3. Date of Birth:** 09/13/1993, Age: 17, Sex: Female.
- 8. Marital Status:** Single (selected), Married, Other.
- 8. Employment Status:** Employed, Full-Time Student (selected), Part-Time Student.
- Billing Cycle:** 4, Quarterly, Minimum Payment.
- Last Stmt.:** Mon, Feb 28, 2011.
- Status:** Active, Alert, Collection, Deceased, Inactive, Patient Credit.

EB Pro Provider Team Status

Guarantor,
Attorney,
Employer and
Referral search
screens.

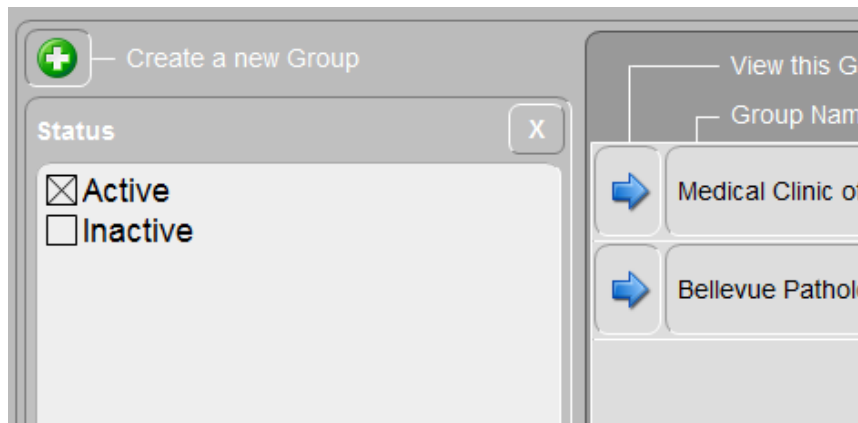


Provider /
Team search
screen

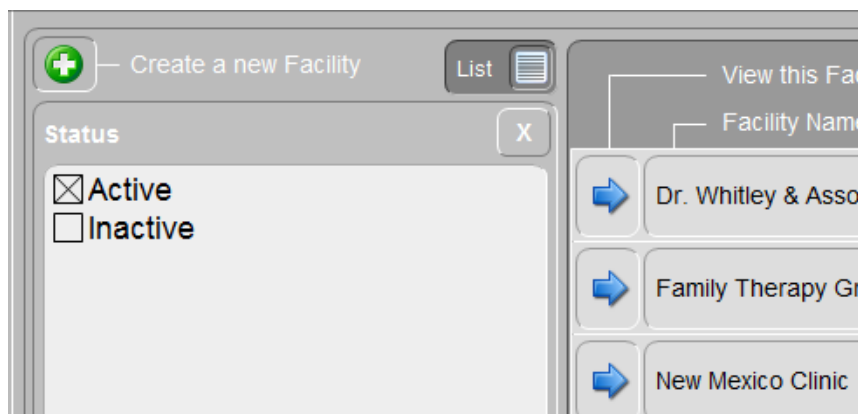


EB Pro Provider Team Status

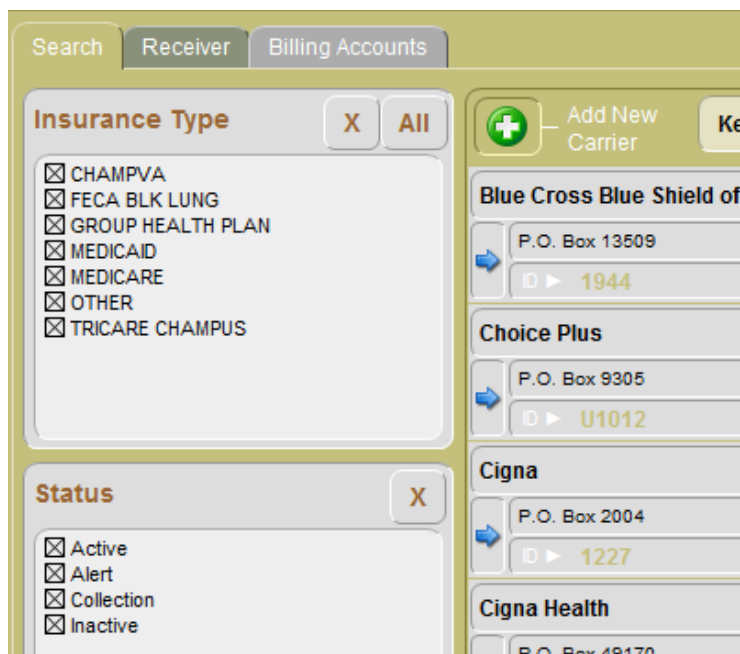
Group Menu
search screen



Facility Menu
Search screen



Carrier Menu
search screen



EB Pro Provider Team Status

And when searching for a Patient in the **Reports** menu, **Patient Query**, **BAL** tab



You may add your own custom Provider/Team Statuses (see below).

However, you want to be specific about adding additional Provider/Team Statuses and try not to overlap too much thus defeating the purpose of isolating the searches.

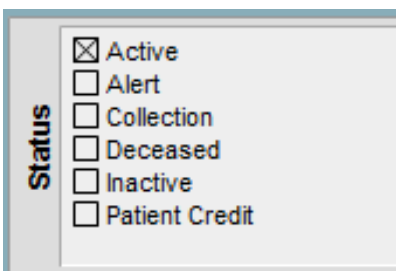
Patient Status color coding

- Go to the **Patient** menu. On the Search screen you will see a color coding key automatically activated when a patient status has been chosen for a Patient.



- Yellow is for Active, Red is for Alert, Orange is for Collection, Black is for Deceased and Green is for a Patient Credit.
- The Patient Status is selected on a Patient screen on the **Information** tab. Click the blue arrow to enter a patient account.

EB Pro Provider Team Status

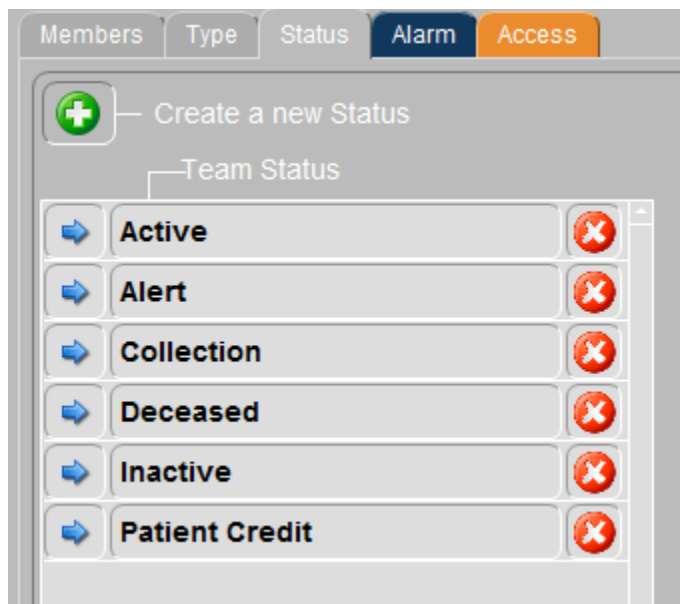


- When a status has been selected in the Status box, the name at the top of the screen will change color to indicate what type of Status it is. These colors will show on the search screen and the Patient Credit (green) will also show when a claim is loaded in the Claims Ledger or Entry screens.

Note: When creating a new status, you cannot add color to the new status.

Creating a New Provider/Team Status

- To create a new Provider/Team Status go to the **Provider/Team** menu and click the **Status** tab..
- Click the green plus icon labeled “**Create a new Status**”.



- Enter the “Status” name, keep it short. Then enter the “Description” of the Status.

EB Pro Provider Team Status

- In the “List Selection” box you can choose one or many of the selections to add this new status to. For example, you could choose to make this status only for “Patient” screens.

Staff Status

Monthly Statement

ID: EBA13

Status: Monthly Statement

Description: Monthly Statement

List Selection (Select from below to add this Status to the chosen list)

- Team
- Patient
- Provider
- Referring
- Group
- Facility
- Employer
- Attorney
- Guarantor
- Referral
- Carrier
- Submitter
- Receiver
- Manufacturer
- Vendor
- Bank
- Billing Account

Team: []

Patient: Monthly Statement

Provider: []

Referring: []

Group: []

Facility: []

Employer: []

Attorney: []

Guarantor: []

Carrier: []

Submitter: []

Receiver: []

Manufacturer: []

Vendor: []

Bank: []

Billing Account: []

Searching for Patient Status in the Patient Query

- Click the **Reports** menu and select the **Patient Query** button. Then go to the **BAL** tab to do a search by “Patient Status”.

PT FIN BAL MED INS TR TRK SCH RPT STA LGL MRK CAR ENH

Patient Status

- Active
- Alert
- Collection
- Deceased
- Inactive
- Monthly Statement
- Patient Credit

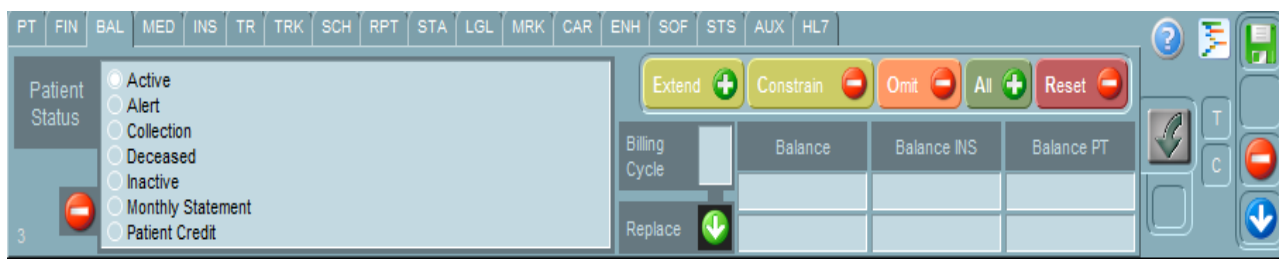
3 []

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EB Pro Provider Team Status

- Clear the query by clicking the red minus icon on the right. Then click the radio button in the “Patient Status” box to choose the status for the search. These can be combined when doing other searches in the Patient Query.



- Then click the blue down arrow to run the query and find those claims with that status.
- You can extend the query to add other Patient statuses by choosing another status and clicking on the “E” to extend the found set to include patients with that status.

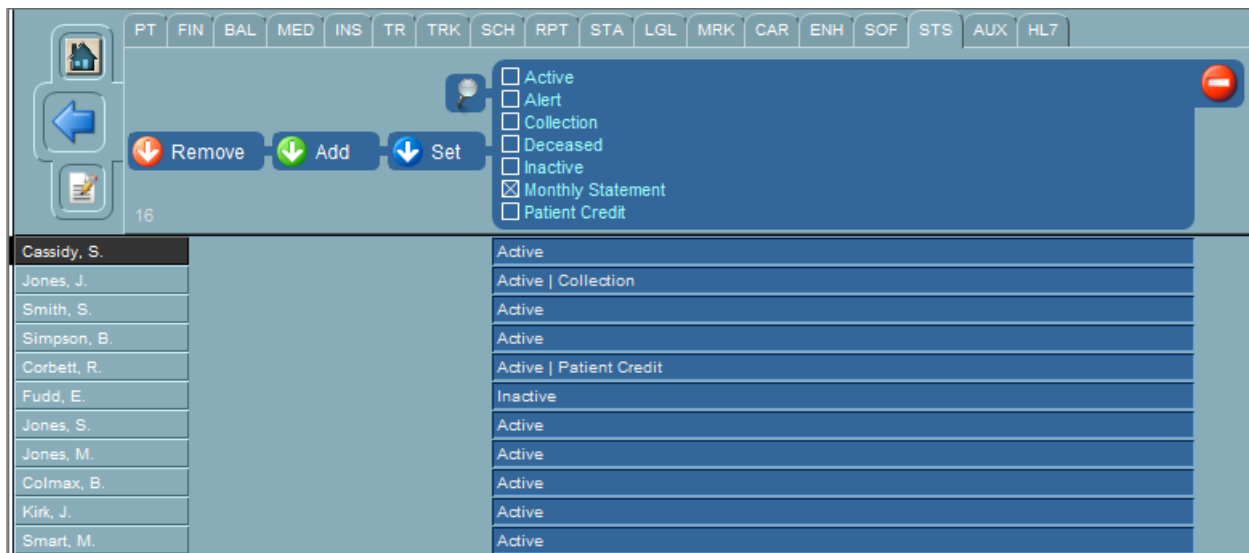
PAA2	Active Collection
Jones, Jonathan	
03/27/1954	P ▶ Tricare
E C O A R	S ▶ Tricare
2	T ▶

Replacing, Adding and Removing Patient Statuses

Important: These functions will change the statuses on ALL patients in the current found set of the current query. You can replace, add and remove statuses from patient records in batch. Use care when selecting patients and statuses to update as it cannot be undone!

EB Pro Provider Team Status

- Click the **Reports** menu and select the **Patient Query** button. Then select the **STS** tab to update or make changes to a Patient Status.
- From a previously found set of claims, clear the status box by clicking on the red minus icon to uncheck all the statuses. Then click the box next to the status you would like to **Remove, Add** or **Set**.



- You will need to confirm that you want to replace the Patient statuses with your selection. Click **Replace** to update the all patient statuses in the found set, or click **Cancel** to cancel the operation.

