

Patient Statements Electronically to IMS Pro



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Before you begin...

Setting your Path

Make sure your user path is set in your provider team account. Go to the **Provider/Team** menu. For each provider or team member, go to the **Preferences** tab, **Path** tab. Initially click "Desktop" for all of the paths (unless you have an office protocol already set up) so the files you create will land on your desktop. If there is another user creating invoices they will do the same. You can create folders such as "Statements Sent" on your desktop where you can move the files after sending them.

The screenshot shows the 'Provider / Team' section for 'Blackwell, Jackie'. The 'Access' tab is selected, and the 'Path' sub-tab is active. The following paths are listed:

Path Name	Fix Path	Documents	Desktop	FileMaker	Temp
Default Statement Path	/C:/Users/Admin/Desktop/				
Default 837 Path (Outbound)	/C:/Users/Admin/Desktop/				
Default 835 Path (Inbound)	/C:/Users/Admin/Desktop/				
Default File Path	/C:/Users/Admin/Desktop/				
Default Collection Path	/C:/Users/Admin/Desktop/				
Default Documentation Path	/C:/Users/Admin/Desktop/				

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Also, on the **Preferences** menu, **Program Defaults** tab > **Age** tab, set the “Default Statement Delivery” field to “IMS Pro.”

The screenshot shows the 'Program Defaults' tab with the 'AGE' sub-tab selected. The 'Default Statement Delivery' field is set to 'IMS Pro' (selected with a radio button). Other visible settings include 'Default Past Due Range' (30, 60, 90, 120), 'Default Statement Trigger Balance' (\$ 3.00), and 'Default Grace Period (Days)' (0). A table of 'Transactions Code' and 'Transactions Type' is also visible on the right side of the form.

Transactions Code	Transactions Type
AC	Adjustment on Claim
AI	Adjustment to Insurance
AP	Adjustment to Patient
HC	Held Charge
HT	Held Transaction
NC	None Claim Charge
OL	Outside Lab
PR	Patient Responsibility
PA	Payment Applied to
PP	Payment by Patient
BP	Payment from Billing
PI	Payment from Ins. C
PC	Payment on Claim

Creating your monthly patient statements

- Go to Reports/Query menu. Select Patient Query.

The screenshot shows the 'Reports / Query' menu with the 'Patient Query' option selected. The menu items are: Scheduling, Claims / Invoices, Payments, Reports / Query (highlighted with a green arrow), Groups, Facilities, Provider / Team, Carriers / Accounts, Contracts, and Libraries. The right side of the screen shows a date range from 08/25/2009 to 08/25/2009 and three buttons: Claim Query, Transaction Query, and Patient Query (selected).

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- Select the **STA** tab.



- Click the red minus to clear the query (on right of screen).



- To perform a search on Patient Balance, in the “L” field enter 5.00. Your search could also include Patient Status, Billing Cycle, and other fields. Make sure your claims are correctly set to “P”, as the patient balance amount is what the patient is being asked to pay.

A screenshot of the 'Patient Balance Search' form in a mobile application. The form has a header with tabs: STA, LGL, MRK, CAR, ENH, SOF, STS, and A. Below the tabs is a search bar with a green down arrow icon. The search bar contains the text 'Billing Cycle'. Below the search bar is a table with columns 'ALL', 'INS', and 'PT'. The 'L' row has the value '5.00' in the 'PT' column. The 'H' row is empty.

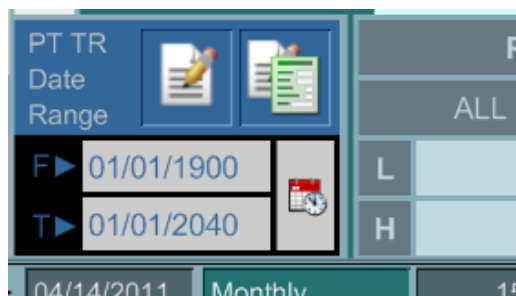
	ALL	INS	PT
L			5.00
H			

- Click the blue down arrow icon on right to perform the search



- Change the dates in PT TR Date Range to the dates which you wish to show detail. All balances before the start date will appear as Prior Balance in the Statement.

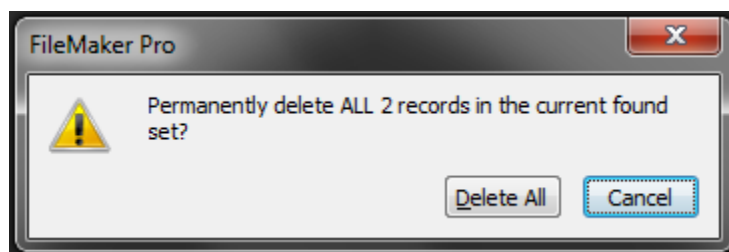
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- Click the SH square if it is yellow to clear the Statement Holders and update the previous patient balances before running new statements.

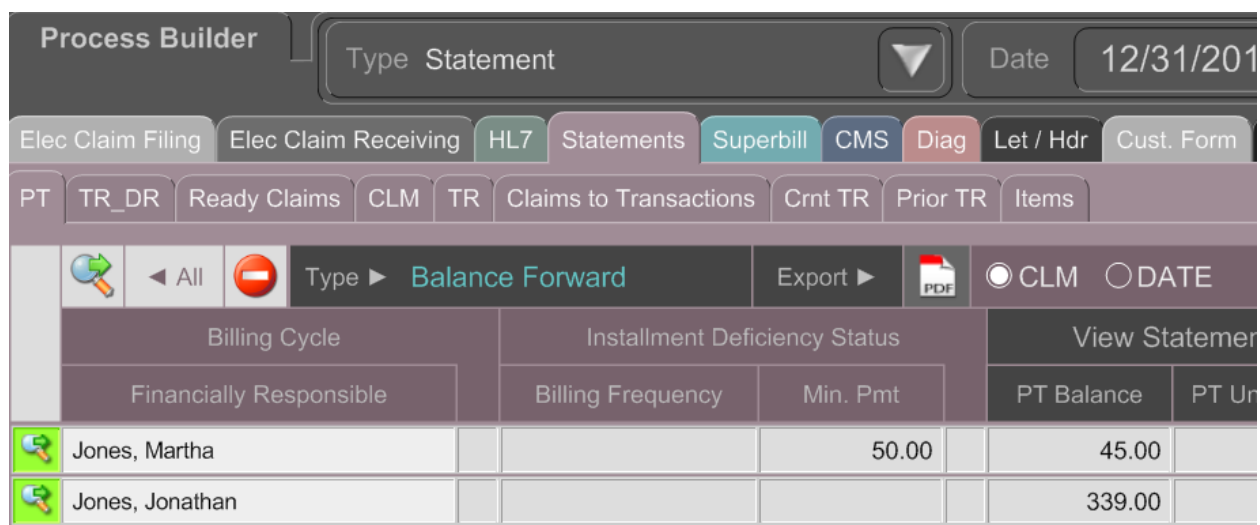


- Select “Delete All” when prompted.

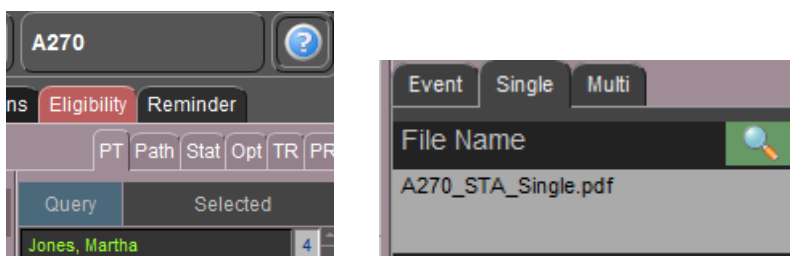


- Click the Balance Forward Statement with Claim Summary icon (report with green paper). For Patient Statements in date order, click the Balance Forward Statement icon (no green paper)
- The Statements tab of the Process Builder will appear. Click the PDF Icon next to “Export” to create the PDF file to send to IMS Pro.

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- The files will be on desktop, or in whatever path was specified in the “Default Statement” field in the **Provider/Team** menu, **Preferences** tab. The file name is shown in the top right corner of your screen, in this case “A270”.
- Return to your desktop. You will see two files, i.e. A270_Multiple.pdf and A270_single.pdf, if you have both single page and multiple page statements.
- To view or print the Single and Multi PDF files, click on the **Path** tab on the right of the **Statements** tab. Then, click the **Single** tab or the **Multi** tab in the bottom right of the screen. Click the Magnifier Glass icon to view and print the PDF file.



- Upload these files to IMS Pro. Then move the files to your Sent Statement folder. The date the statement was sent to the patient will appear in their information page and on their Processing tab.

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Billing Cycle	4	Billing Freq.	Minimum Payment
	Monthly		20.00
Last Stmt.	4/30/2011		

Information Insurance Guarantor Attorney Employer Referral Appointments Claim Ledger Transaction Ledger Processing Link

View This Superbill

View This Statement Batch

View This Custom Form

View This Letter

Go to This Processing Event

View This Patients Statement

Date	Processing Type	Processing Status	Letter / Form Title
03/31/2011	Statement		

Icons: Blue arrow, Green plus, Document icons, Printer icon, Mail icon