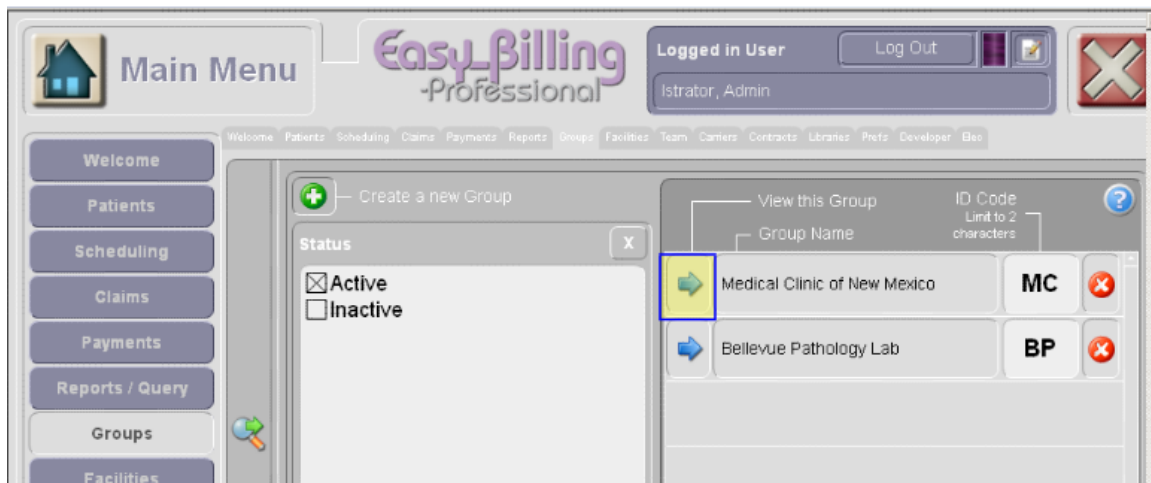


# Groups Setup



## Groups Setup

- From the Main Menu, or the Welcome screen, click on the **Groups** menu.
- To create a new Group, click on the green plus sign labeled “Create a new Group”.
- To view an existing group, click the blue arrow next to the group name. On all of the screens, that is where you will click to edit, update, or view information.



- A Group could be a company or a person.
- The **Name** tab is where you will enter the billing provider information and where you will enter the “Name”, “Address”, “City”, “State” and “Zip Code”, information that goes into Box 33 on the CMS form.
- A group is identified by the group NPI number, as well as the EIN number for the company. The “Group NPI#” **must** be filled in.
- Enter a unique ID Code for your Group, limiting to two characters.

# Groups Setup

Group: Medical Clinic of New Mexico ID: EBA1

Company | Person | Graphics | Contact | Remittance | Return

Name: Medical Clinic of New Mexico

ID Code (Limit to 2 Characters): MC

Status:  Active  Inactive

Address: 343 Paseo de Peralta

City: Santa Fe State: NM Zip Code: 87505

Phone: 505-632-6363 Fax: 505-632-6364

Email: mcnm@yahoo.com

WWW: Add http://www.

Group NPI #: 1831167196

- You will need to enter your remittance address on the **Remittance** tab and your return address on the **Return** tab ONLY if you are sending electronic patient statements with IMS Pro (clearing house).

Contact | Remittance | Return

This is the data that will appear on IMS Pro Statements for remittance of payment.

**Transfer Contact Data To Remittance**

Name: Medical Clinic of New Mexico

Address: 343 Paseo de Peralta

City: Santa Fe State: NM Zip Code: 87505

Phone: 505-632-6363

Contact | Remittance | Return

This is the data that will appear on IMS Pro Statements for return address.

**Transfer Contact Data To Remittance**

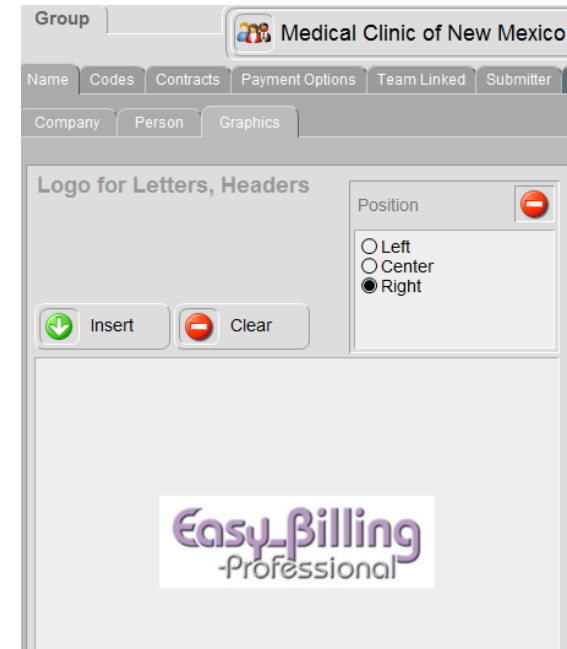
Name: Medical Clinic of New Mexico

Address: 343 Paseo de Peralta

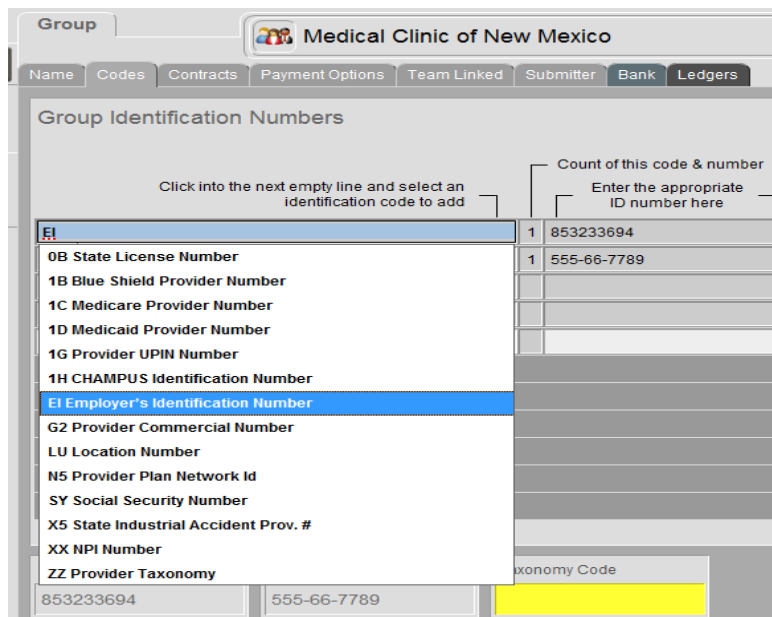
City: Santa Fe State: NM Zip Code: 87505

# Groups Setup

- The **Graphics** tab is where you can insert logo's for letters and headers. PNG format is recommended for its smaller size.



- Employer Identification Number, the EIN number, is the main reason to have a group. On the **Codes** tab, click on the drop down menu to select the “EIN Employer’s Identification Number”. There are several other identification numbers or qualifying numbers that you can choose from.



# Groups Setup

- You will enter the number to the right and it will be displayed at the bottom of the screen. These numbers will automatically get pulled into the claim, or filed electronically as you have set them up in your defaults and contracts.

The screenshot shows the 'Group Identification Numbers' section for 'Medical Clinic of New Mexico' (ID: EBA1). The interface includes tabs for Name, Codes, Contracts, Payment Options, Team Linked, Submitter, Bank, and Ledgers. The main area contains a table with columns for 'Code', 'Description', 'Count of this code & number', and 'ID number here'. Below the table are input fields for EIN #, Social Security #, and Taxonomy Code.

Code	Description	Count of this code & number	ID number here	Description
EI	Employer's Identification Number	1	853233694	
SY	Social Security Number	1	555-66-7789	

EIN # 853233694    Social Security # 555-66-7789    Taxonomy Code

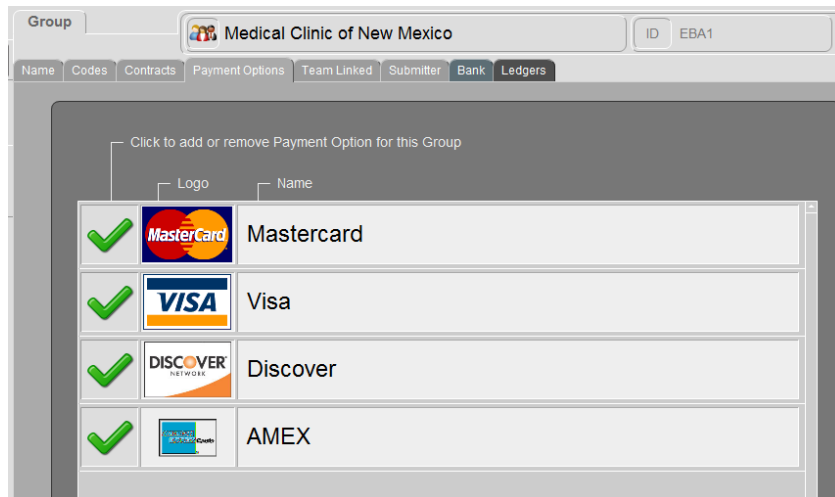
- Contracts that are linked to this group will show up on the **Contracts** tab once they have been attached to the Group.

The screenshot shows the 'Contracts' tab for 'Medical Clinic of New Mexico' (ID: EBA1). The interface includes tabs for Name, Codes, Contracts, Payment Options, Team Linked, Submitter, Bank, and Ledgers. The main area displays a table with columns for 'Contract Name', 'Start Date', 'Expiration Date', and 'Patient Plan Name'.

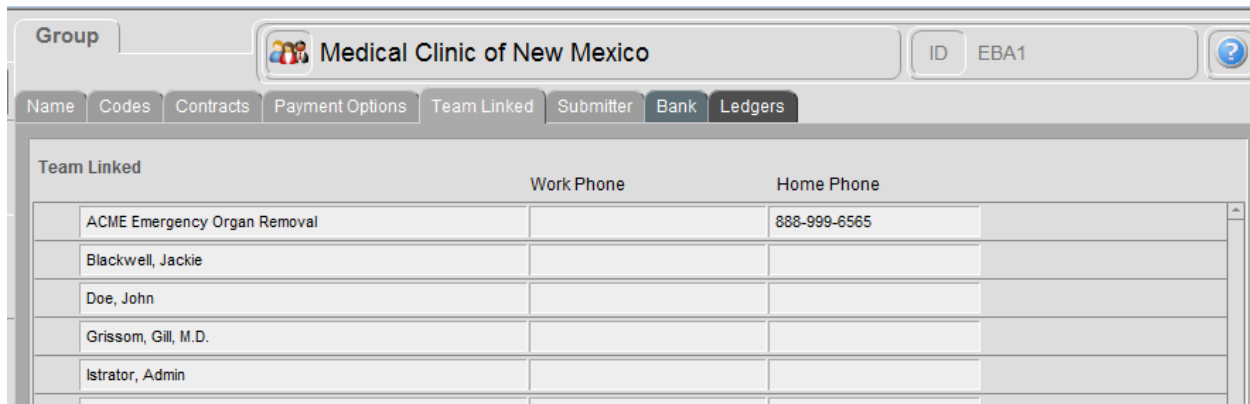
Contract Name	Start Date	Expiration Date	Patient Plan Name
Default Medical Clinic of NM	1/1/2004	12/31/2018	
Medicare MCNM	1/1/2004	12/31/2018	

## Groups Setup

- Click on the **Payment Options** tab. These options were entered in your Preferences. If you decide now that you do not want to put one of these options, or the icon on your statement, or Superbill, you can simply unclick it here.



- Team members that are linked to this group will appear on the **Team Linked** tab.



- The **Submitter** tab is for entering the ID's for the specific clearing house, either IMS Pro or Abrea.



# Groups Setup

- The **Bank** tab is where you can record information about your bank account, which will be used when you are creating a deposit slip in the Payments section of the program. You can return to this screen later to see exactly how many deposits were made and what date for each bank account.

- The **Ledgers** tab shows all transactions for this group, including claim no., date, description, transaction code, amount, patient name and responsibility, as well as charges, adjustments and payments.

CL Date	Claim #	CHG	ADJ	PMT	RFD	BAL	Patient	Default Provider
03/24/2010	CLA43	150.00				150.00	Smart, M.	Smith, Zachary, Dr., M.D.
04/06/2010	CLA44	85.00				85.00	Munster, H.	Smith, Zachary, Dr., M.D.
04/06/2010	CLA45	200.00	10.00	190.00		0.00	Anderson, S.	Maulder, Kevin L, MD
06/22/2010	CLA52	140.00	10.00	60.00		70.00	Cassidy, S.	O'Brien, Sharon, PT
09/01/2010	CLA87	195.00		195.00		0.00	Jones, J.	Maulder, Kevin L
09/24/2010	CLA99	95.00				95.00	Jones, J.	Maulder, Kevin L
10/04/2010	CLA102	45.00				45.00	Adams, M.	
10/05/2010	CLA103	185.00				185.00	Munster, H.	Smith, Zachary, Dr., M.D.
10/20/2010	CLA110	190.00		190.00		0.00	Corbett, R.	Maulder, Kevin L
11/07/2010	CLA111	90.00		90.00		0.00	Cassidy, S.	O'Brien, Sharon, PT
01/25/2011	CLA140	90.00		45.00		45.00	Colmax, B.	Smart, George, MD