

Entering a New Patient



Entering a New Patient

- Select the **Patients** menu.
- Click the **All** button on the Patient Status box.
- Click the **All** button on Keyword Search, or do a search to see if the patient is already in the system.
- If the patient is already entered, click the blue arrow next to the patient's name to go to that patient's account.
- If they are not, then click the green plus icon labeled "**New Patient.**"



- Enter patient demographics in the **Information** tab for the patient.

Patient		PAA1	Balance	1665.00	Cassidy, Sarah				
Information	Insurance	Guarantor	Attorney	Employer	Referral	Appointments	Claim Ledger	Transaction Ledger	Pr
2. Name									
Prefix	First	Middle	Last	Suffix					
	Sarah		Cassidy						
5. Address			City	State	Zip Code				
522 Plaza Blvd			Santa Fe	NM	87505				
H. Ph. (Inc. Area Code)	Wk. Ph. (Inc. Area Code)	Cell Phone (Inc. Area Code)	Fax (Inc. Area Code)	Pre					
505-423-6969				(Cl					

Entering a New Patient

- Enter a Default Referring Provider, Rendering Provider or Facility to auto-fill on a new claim. Click the grey down arrow to get a search screen.

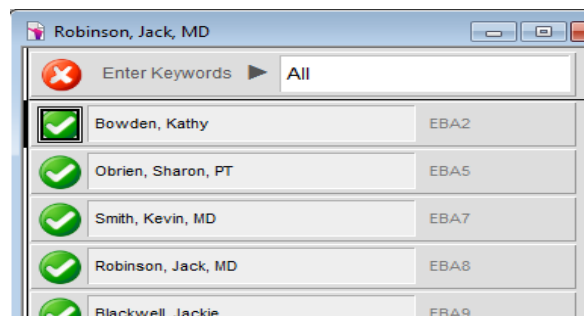


17. Default Referring Provider
Smith, Kevin, MD

24.J. Default Rendering Provider
Obrien, Sharon, PT

32. Default Facility

- Enter "ALL" to bring the entire list forward or, part of the name, then click the green arrow next to the name to select.



Robinson, Jack, MD

Enter Keywords All

<input checked="" type="checkbox"/>	Bowden, Kathy	EBA2
<input checked="" type="checkbox"/>	Obrien, Sharon, PT	EBA5
<input checked="" type="checkbox"/>	Smith, Kevin, MD	EBA7
<input checked="" type="checkbox"/>	Robinson, Jack, MD	EBA8
<input checked="" type="checkbox"/>	Blackwell, Jackie	FBA9

Entering Patient Insured's Information and Carriers

- Click the **Insurance** tab.
- Click the green button next to "P" to enter the Primary Insurance Carrier.



Insurance Guarantor Attorney Employer Referral Appointments Claim Ledger

Signature on File _____ Date _____

P ▶ Insured
▶ Carrier

- Choose the Insurance Company (previously entered in the Carrier screen) using the grey down arrow. (Use All to get the entire list.)

Entering a New Patient

- Choose if the insured is the self, spouse, child or other for auto-fill.

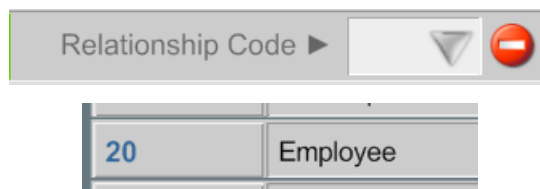
- **Workman's Comp**

- When entering a Workman's Comp patient, go to the **Insurance** tab of the patient screen. Select "Other" for "Patient Relationship to Insured".

- Enter a "Company Name".

- Set the "Relationship Code" to "20".

Entering a New Patient

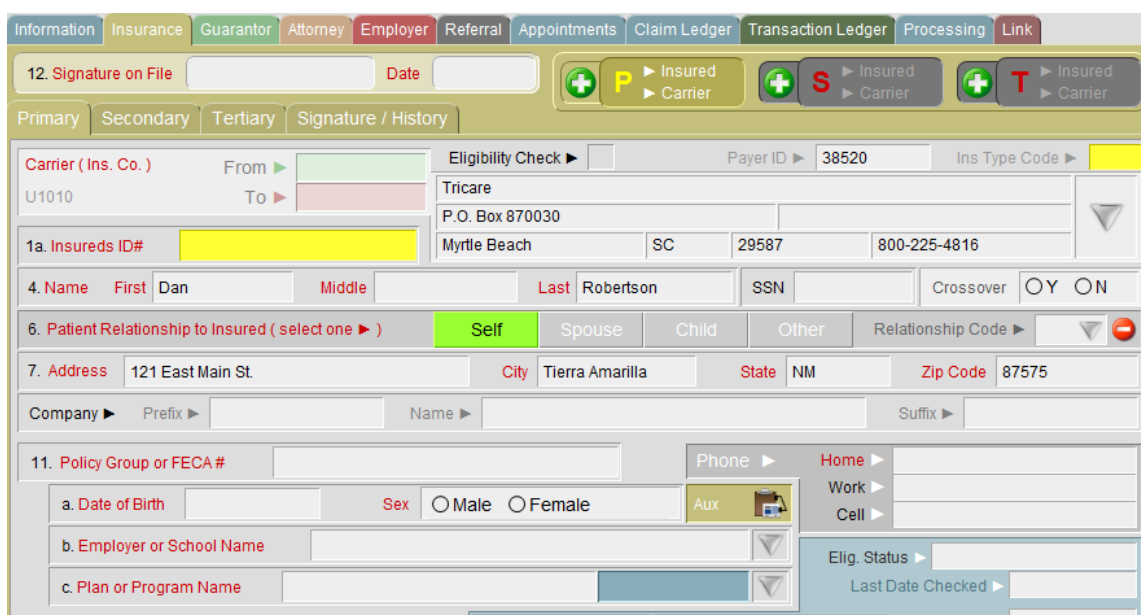


Relationship Code ▾

20	Employee
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Leave the “Relationship Code” blank for anything other than Workman’s Comp. To clear the “Relationship Code”, click the red minus icon next to it.

- Enter fields that are in yellow, indicating that they are required from the insurance company. Other fields are optional.



- The “From” field (green field at top) is the date that the patient started insurance coverage with this carrier. The “To” field is when the coverage expired.
- Repeat if the patient has a Secondary Insurance by clicking on the green button next to “S” for Secondary.
- Enter “Signature on File” at the top for (box 12 1500 form). Once entered, you will be able to choose it in a drop down list. Enter the date of patient's signature.
- **Signature/History** tab is to enter “Signature on File” for box 13 and also the history of all insurance companies.

Entering a New Patient

Primary Secondary Tertiary Signature / History

Indicate Status
(Primary = "P", Secondary = "S", Tertiary = "T")

4. Ins Co. Tricare Insured Robertson, Dan

13. Signature on File Date Ins. Type Code

- “Eligibility Checkable” auto-fills from the Carrier to show that the Carrier has been marked as being checkable.

Eligibility Check Payer ID 38520 Ins Type Code C1

Tricare

P.O. Box 870030

Myrtle Beach SC 29587 800-225-4816

- “Payer ID” is entered in the Carrier file and automatically fills.
- “Ins Type Code” is used when there is secondary insurance.
- “Authorization” is entered manually according to an authorization # or CPT code for the number of maximum visits allowed within a date range. The visits will count down as the CPT code is used on a patient's claims. Status, Last Date Checked, Deductible Amount and CoPay amounts are entered manually.

Elig. Status Check

Last Date Checked

Deductible

Co-Pay

Authorization Visits

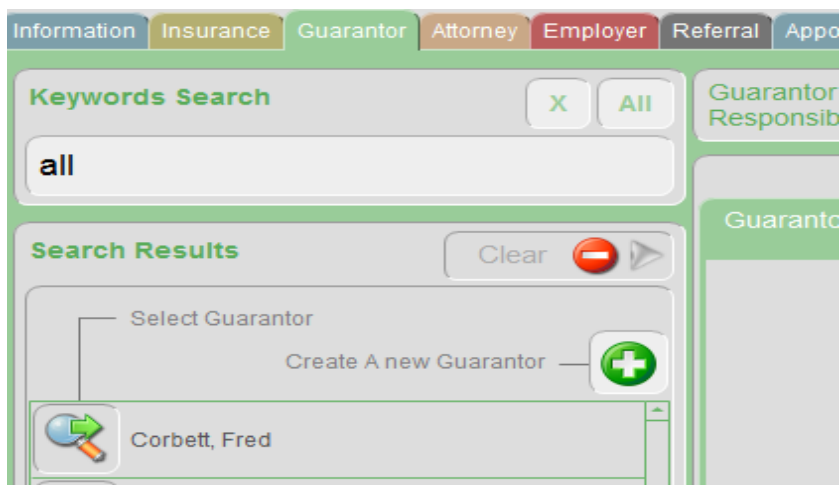
Revert Save

Entering a Guarantor

- Click the **Guarantor** tab.

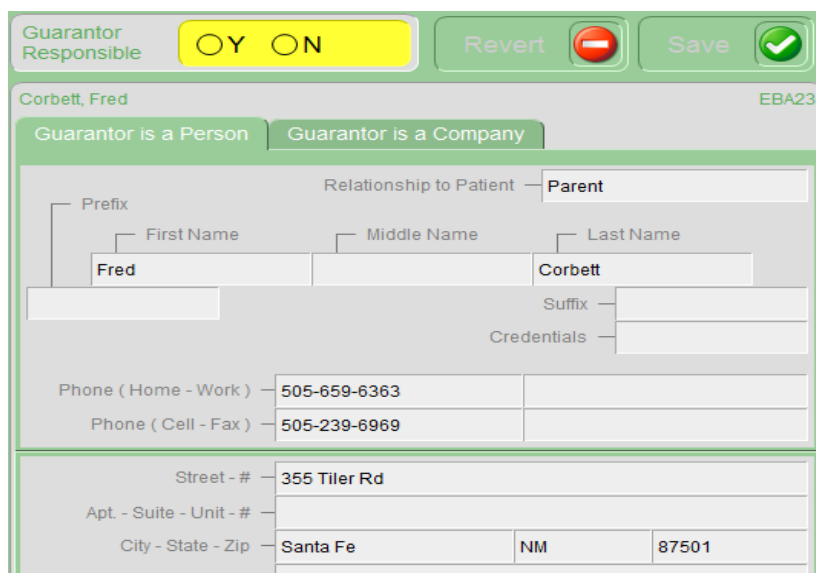
Entering a New Patient

- Search to see if the Guarantor has been previously entered for another patient, or click the green plus icon labeled "**Create A New Guarantor.**"



The screenshot shows a software interface with a top navigation bar containing tabs for Information, Insurance, Guarantor, Attorney, Employer, Referral, and Appo. Below the navigation bar is a 'Keywords Search' section with a search box containing 'all' and buttons for 'X' and 'All'. Below that is a 'Search Results' section with a 'Clear' button and a red minus icon. The search results list 'Corbett, Fred' with a magnifying glass icon and a green plus icon labeled 'Create A new Guarantor'.

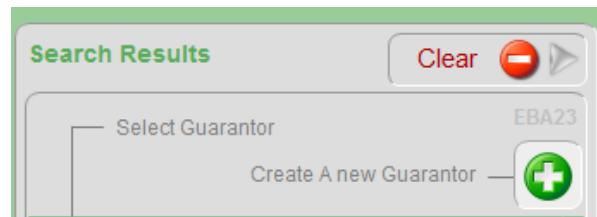
- Enter the "Relationship to Patient" from the drop down list.
- Enter the name and contact information.
- If the Guarantor is a Company, click the **Guarantor is a Company** tab and enter the Company Name.
- Click "Y" or "N" in the "Guarantor Responsible" field to have the guarantor information go onto the Patient Statement instead of the patient information.



The screenshot shows the 'Guarantor' entry form for 'Corbett, Fred'. At the top, there is a 'Guarantor Responsible' field with radio buttons for 'Y' and 'N', and 'Revert' and 'Save' buttons. Below this, the name 'Corbett, Fred' is displayed. The form has two tabs: 'Guarantor is a Person' (selected) and 'Guarantor is a Company'. Under the 'Guarantor is a Person' tab, there is a 'Relationship to Patient' dropdown menu set to 'Parent'. The name fields are: Prefix (empty), First Name (Fred), Middle Name (empty), Last Name (Corbett), Suffix (empty), and Credentials (empty). The phone fields are: Phone (Home - Work) (505-659-6363) and Phone (Cell - Fax) (505-239-6969). The address fields are: Street - # (355 Tiler Rd), Apt. - Suite - Unit - # (empty), City - State - Zip (Santa Fe, NM, 87501), and Email (Fred@...).

Entering a New Patient

- If the red minus icon labeled "Clear" is clicked, the information will be removed from that patient's account.



Entering a new Attorney, Employer and Referral for a Patient

- These are entered the same as the Guarantor except Referral also has the ability to enter a Campaign which can be searched later for marketing and creating letters.



Entering an Appointment

- Click the **Appointments** tab to create a new appointment, view or search for future appointments, or print an appointment card.
- The Default Provider will auto fill from the Patient Information screen, or can be added from the drop down search.
- Click the green plus icon labeled "**Add a New Appointment**" to create a new appointment for that patient.

Entering a New Patient

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

Current Forward By Date Range Defaults

Reminder Method Phone Email Text Add a New Appointment

Next Appointment Appointment Card

Following appointments from Apr 19, 2011 on

Staff Location	Staff	Category
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- Click the clock to the left of the "Start" and "End" times to choose the correct appointment times. Choose the Hour and Minute and if AM or PM, then click the green check button to set.

Appointment Alarm Linked Re-Occur L

Date

Tue, Apr 19, 2011

Start 09:00 AM

End 09:15 AM

Description

Appointment

Start

Hour Minute

9 30

AM PM

12 6 12 6 15 20 25

1 7 1 7 30 35 40

2 8 2 8 45 50 55

3 9 3 9

4 10 4 10

5 11 5 11

9:30 AM

CT Start

- The provider will default or choose from the Team Search list.

Maulder, Kevin L, MD

Entering a New Patient

- Choose the Criteria, Category, set an Alarm, enter Comments and Link additional appointments if they are recurring.
- Click the blue Back Arrow on the left of the screen to return to the patient's account.



Click the Claim Ledger tab to view claim information or go to a claim

Information Insurance Guarantor Attorney Employer Referral Appointments Claim Ledger Transaction Ledger Processing Link												
Status General Details Unapplied Open Ready Statement Aging All Aging PT												
Go to Claim Ledger		Claim Status (Open Processed Verified)				Status Insurance (P = Primary S = Secondary T = Tertiary)					Crossover	
Go to Claim Entry		CL Date	Claim #				Total Charges	Total Adjust.	Total Payments	Insurance Balance	Patient Balance	Balance Due
		04/16/2011	CLA188	Y	N	P	130.00			130.00		130.00
		04/16/2011	CLA189	Y	N	P	125.00			125.00		125.00

- Click the blue arrow to go directly to the Claim Entry screen or Claim Ledger from the **General** tab.
- The **General** tab shows claim totals and what balances are due.
- Go to the **Details** tab for additional information on charges, payments, refunds and adjustments.

Status General Details Unapplied Open Ready Statement Aging All Aging PT												
CL Date	Claim #	Diagnosis Codes				Accession #	Date First Symptom	Date Ini. Treatment	Date Last Seen	Date Sim. Illness	Date Last X-Ray	Age
		1	2	3	4							
04/16/2011	CLA188	123.4				S08-00002						51
04/16/2011	CLA189	123.40	456.70			SP09-00001						53

- The **Unapplied** tab will show unapplied payments.

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Status							General		Details		Unapplied		Open		Ready Statement		Aging All		Aging PT	
Date Created	Referring Provider		Unapplied Insurance	Unapplied Patient	Claim Total Unapplied	Claim Balance	Rendering Providers													
	Claim #						Claim Status													
04/16/2011	→	CLA188				130.00	Open Un-processed Incomplete													
Doe, John							Klein, M.													
04/16/2011	→	CLA189				125.00	Open Un-processed Incomplete													
Doe, John							Klein, M.													

Apply Patient Refunds and View Source Payments

- See Patient Refunds

Processing tab

- The **Processing** tab will show dates that a CMS 1500 form, Statement, Superbill Receipt or Letter that was processed for the specific patient. Simply click on the icon to view each.

Information	Insurance	Guarantor	Attorney	Employer	Referral	Appointments	Claim Ledger	Transaction Ledger	Processing	Link												
<div style="display: flex; justify-content: space-between;"> <div>Go to This Processing Event</div> <div>View This Superbill</div> <div>View This Statement Batch</div> <div>View This Custom Form</div> </div> <div style="display: flex; justify-content: space-between; margin-top: 10px;"> <div>View This Patients Statement</div> <div>View This Letter</div> </div> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th>Date</th> <th>Processing Type</th> <th>Processing Status</th> <th colspan="2"></th> <th>Letter / Form Title</th> </tr> </thead> <tbody> <tr> <td>→ 02/03/2011</td> <td>HL7 Import</td> <td></td> <td></td> <td></td> <td></td> </tr> </tbody> </table>											Date	Processing Type	Processing Status			Letter / Form Title	→ 02/03/2011	HL7 Import				
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