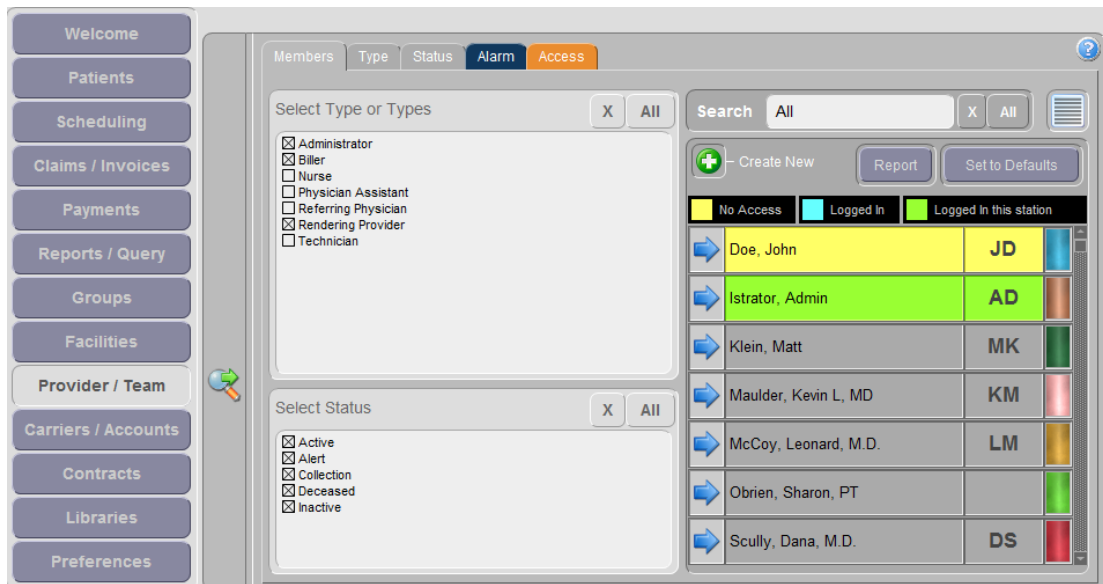


Provider Team Setup



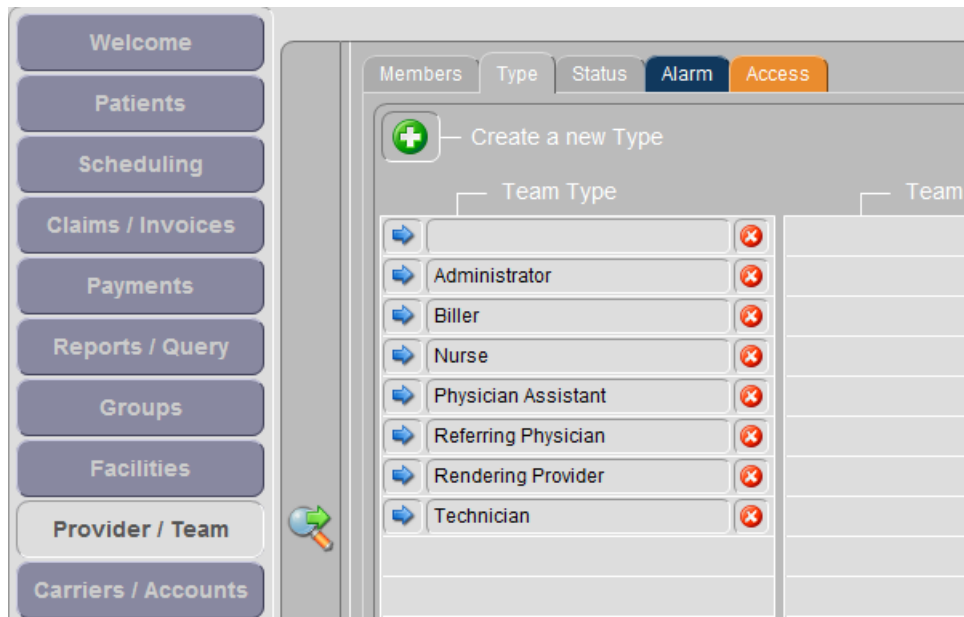
Provider/Team Set Up

- On the **Provider / Team** menu you will find “Type” and “Status” values. There are master types and statuses that come with the program which you can use for searching and reporting.



- You can add new values to the “Type” and Status lists. On the **Type** tab, click the “Create a New Type” button to create a new type if it is not in the list. For instance, you can type in “Billing Assistant”, which will then create “Billing Assistant” in the list.

Provider Team Setup

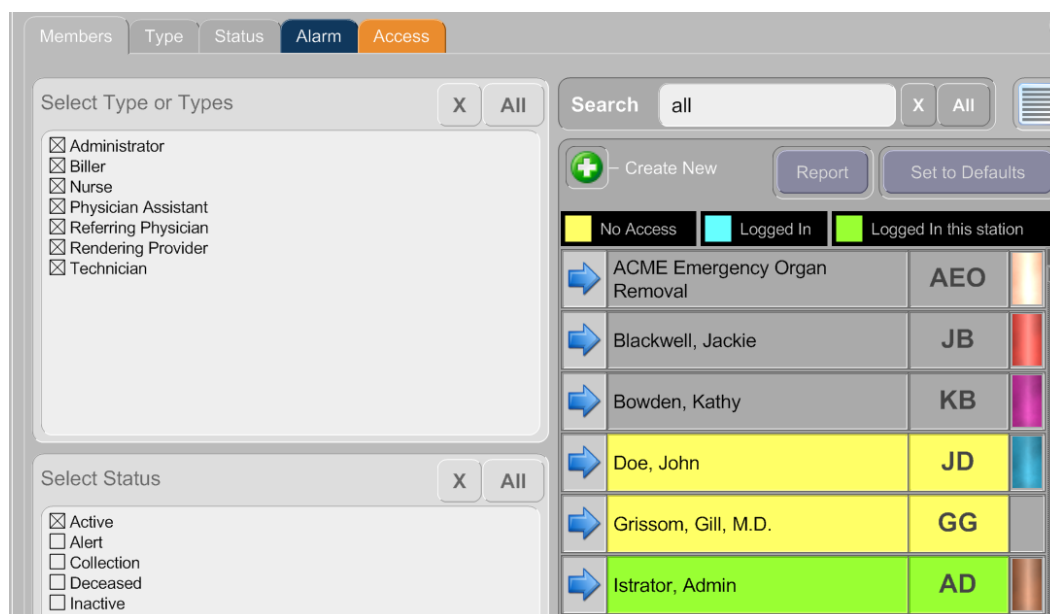


- Patients and the Provider/Teams share the “Status” values. So if you want to add new statuses for the patients, you will return to the **Provider/Team** menu in order to do that.

Provider Team Setup



- If you will be using the scheduling system in the Easy Billing Professional program, the color-coded bar graphs to the right of the names of the Provider/Team and at the top in the Log In are chosen during the setup process for the Provider/Team members.
- To create a new Provider or Team, go to the **Members** tab and click on the “**Create New**” button.



Provider Team Setup

- For “Administrator”, the type “Administrator” has been checked. When first entering a Provider/Team person, you will see that the type field is highlighted in yellow, indicating that this field must be filled in. Throughout the Easy Billing program, when you see fields in yellow, make special notice to get them filled in.
- Company name field is typically NOT used, especially for providers for whom you are going to be doing billing.

The screenshot shows the 'Provider / Team' setup form. The 'Type' field is highlighted in yellow, indicating it must be filled in. The form includes fields for Company Name (EBA20), Initials, NPI #, and Status. The 'Type' field is a list of checkboxes with the following options: Administrator, Biller, Nurse, Physician Assistant, Referring Physician, Rendering Provider, and Technician. The 'Status' field has checkboxes for Active, Alert, Collection, Deceased, and Inactive. The 'NPI #' field is also highlighted in yellow.

- For instance, if you were creating a new Rendering Provider, you would be shown that the NPI field needs to be filled in by seeing that the field is yellow.

The screenshot shows the 'Provider / Team' setup form for a new Rendering Provider. The 'NPI #' field is highlighted in yellow, indicating it must be filled in. The form includes fields for Company Name (EBA20), Initials (CW), First Name (Charles), Last Name (White), and Credentials (MD). The 'Type' field is a list of checkboxes with the following options: Administrator, Biller, Nurse, Physician Assistant, Referring Physician, Rendering Provider, and Technician. The 'Status' field has checkboxes for Active, Alert, Collection, Deceased, and Inactive. The 'NPI #' field is also highlighted in yellow.

Provider Team Setup

- The **Contact** tab is typically used as a reference to the provider or team member. If it is a Rendering Provider, or someone that is doing billing for specific groups or facilities, you would check the “Group” and “Facility” to which they are associated.

The screenshot shows the 'Provider / Team' setup form with the 'Contact' tab selected. The form is divided into several sections:

- Group:** A list of checkboxes for selecting associated groups. 'Medical Clinic of New Mexico ~ MC' is checked.
- Facility:** A list of checkboxes for selecting associated facilities. 'New Mexico Clinic ~ NM' is checked.
- Address:** Fields for Street & Number, Unit or Suite, City, State, and Zip Code.
- Home Phone:** A text input field.
- Work Phone:** A text input field.
- Fax:** A text input field.
- Pager:** A text input field.
- Cell Phone:** A text input field.
- Email:** A text input field.
- URL (WWW):** A text input field with a dropdown arrow and a button labeled 'Add http://www.'.
- Date of Birth:** A date selection field.
- Sex:** Radio buttons for 'Male' and 'Female'.
- Marital Status:** Radio buttons for 'Single', 'Married', and 'Other'.

- Click on the “Qualifier Codes” tab to enter qualifiers for the providers. Then click the drop down and choose whichever code that you are filling in. These will be used later when entering the contract pricing.

The screenshot shows the 'Provider / Team' setup form with the 'Qualifier Codes' tab selected. The form displays a table with the following structure:

Qualifier Code	Description	ID Number
1G	Provider UPIN Number	

Instructions above the table: 'Click into the next empty line and select a qualifier code to add' and 'Enter the appropriate ID number here'.

Provider Team Setup

- Easy Billing Professional has the ability to have system wide defaults, user level defaults and Provider/Team level defaults. In the **Preferences** tab, you will enter the “Default Group”, “Default Facility”, the Zoom Level, the Statement and Superbill headers, the information for using the Scheduler, Place of Service and Default Date of Service.

The screenshot shows the 'Provider / Team' window for 'White, Charles, MD'. The 'Preferences' tab is active. Under 'Default Group', 'Medical Clinic of New Mexico ~ MC' is selected. Under 'Default Facility', 'New Mexico Clinic ~ NM' is selected. At the bottom, the 'Default Place of Service Code' is set to '11'.

- If this is for a Rendering Provider, you will put the Provider name, so that it will appear in the “Signature” field, Box 31 on the actual CMS form.

The screenshot shows the 'Access' tab in the 'Provider / Team' window. A list of status options is shown: Active, Alert, Collection, Deceased, and Inactive. Below the list are fields for 'Select a Rendering Provider' (Maulder, Kevin L, MD), 'Select a Referring Provider' (Robinson, Jack, MD), '31. Signature on File' (Kevin Maulder MD), and 'Preferred Name' (Dr. Maulder).

Provider Team Setup

Name Contact Qualifier Codes Preferences **Access** Appointments Work List Contracts Patients Ledgers

Place Provider Printing Claim Status Path Calendar Filter Schedule Event Visual Task

Default Printer ⊖

Dell 1110 Laser

Default Form ⊖

CMS 1500
 hp printer
 Test

Name Contact Qualifier Codes Preferences **Access** Appointments Work List Contracts Patients Ledgers

Place Provider Printing Claim Status Path Calendar Filter Schedule Event Visual Task

Default Claim Status ⊖ Default Date of Service

Amended
 Appealed
 Closed
 Collection Marked
 Collection Sent
 Complete
 Denied
 Incomplete
 Needs Review
 Not Verified
 Open
 Patient Self Pay
 PMT from Patient
 PMT from Primary
 PMT from Secondary
 PMT from Tertiary
 Processed
 Ready CMS
 Ready Elec
 Ready Statement
 Sent Primary
 Sent Secondary

Sent Tertiary
 Un-processed
 Verified

Default Statement Header: HDR 10 ENV 1 WDW

Default Superbill Header: HDR 10 ENV 1 WDW

Default CLBL Statement Header: HDR 10 CB Invoice

Default CLBL Invoice Header: HDR 10 CB Invoice

Name Contact Qualifier Codes Preferences **Access** Appointments Work List Contracts Patients Ledgers

Place Provider Printing Claim Status Path Calendar Filter Schedule Event Visual Task

Default Team Status ⊖

Active
 Alert
 Collection
 Deceased
 Inactive

Default Carrier Status ⊖

Active
 Alert
 Collection
 Inactive

Default Patient Status ⊖

Active
 Alert
 Collection
 Deceased
 Inactive
 Patient Credit

Provider Team Setup

Name Contact Qualifier Codes Preferences **Access** Appointments Work List Contracts Patients Ledgers

Place Provider Printing Claim Status Path Calendar Filter Schedule Event Visual Task

Default Statement Path Fix Path Documents Desktop FileMaker Temp

Default 837 Path (Outbound) Fix Path Documents Desktop FileMaker Temp

Default 835 Path (Inbound) Fix Path Documents Desktop FileMaker Temp

Default File Path Fix Path Documents Desktop FileMaker Temp

Default Collection Path Fix Path Documents Desktop FileMaker Temp

Default Documentation Path Fix Path Documents Desktop FileMaker Temp

Name Contact Qualifier Codes Preferences **Access** Appointments Work List Contracts Patients Ledgers

Place Provider Printing Claim Status Path Calendar Filter Schedule Event Visual Task

Filter Event Type -

- Claim Task
- Office Closed
- Room 1
- Room 2
- To Do
- Trauma
- Treatment 1
- Unavailable
- Waiting

Filter Event Status -

- Cancelled
- Completed
- Confirmed
- Incomplete
- No Show
- Pending
- Tentative

Filter Team Type -

- Administrator
- Biller
- Nurse
- Physician Assistant
- Referring Physician
- Rendering Provider
- Technician

Filter Team Status -

- Active
- Alert
- Collection
- Deceased
- Inactive

Name Contact Qualifier Codes Preferences **Access** Appointments Work List Contracts Patients Ledgers

Place Provider Printing Claim Status Path Calendar Filter Schedule Event Visual Task

Event Type -

- Claim Task
- Office Closed
- Room 1
- Room 2
- To Do
- Trauma
- Treatment 1
- Unavailable
- Waiting

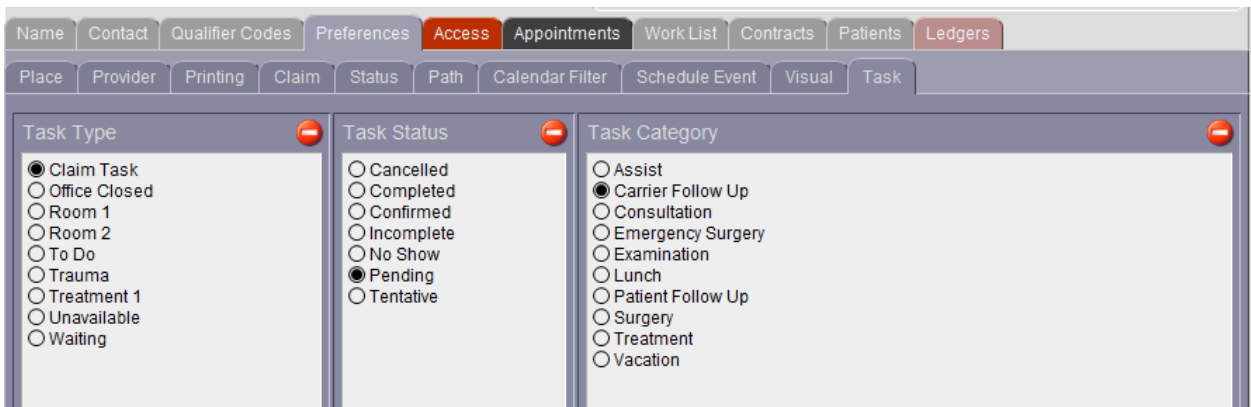
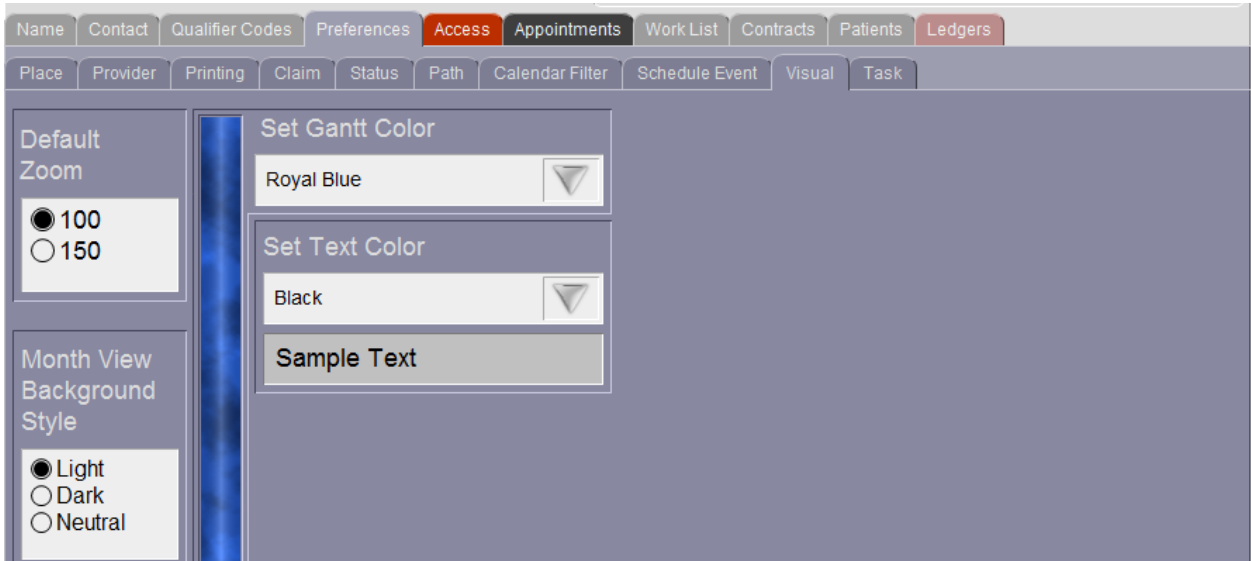
Event Status -

- Cancelled
- Completed
- Confirmed
- Incomplete
- No Show
- Pending
- Tentative

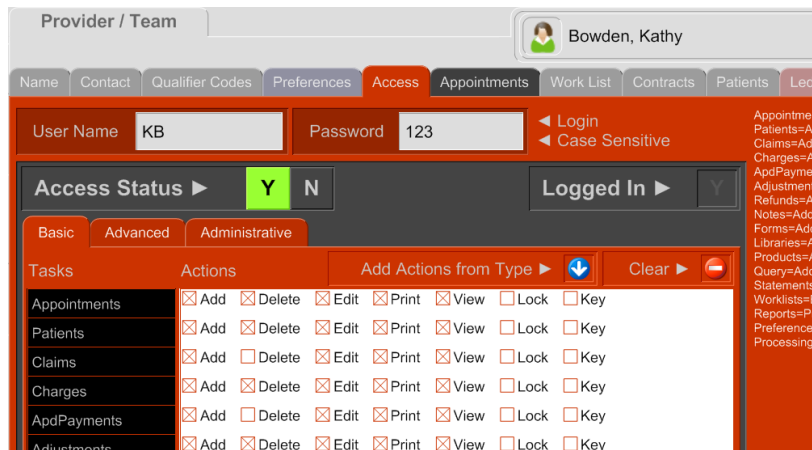
Event Category -

- Assist
- Carrier Follow Up
- Consultation
- Emergency Surgery
- Examination
- Lunch
- Patient Follow Up
- Surgery
- Treatment
- Vacation

Provider Team Setup

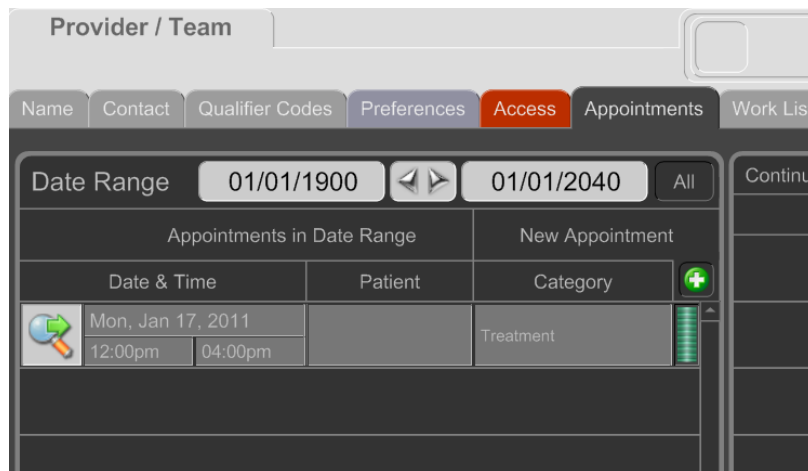


- Any provider or team member that will actually be using the system and logging in, must have a user name and password. When entering the user name and password, remember that they are case sensitive. The Access Status must then be clicked to “Y” in order to give that user access to the system.

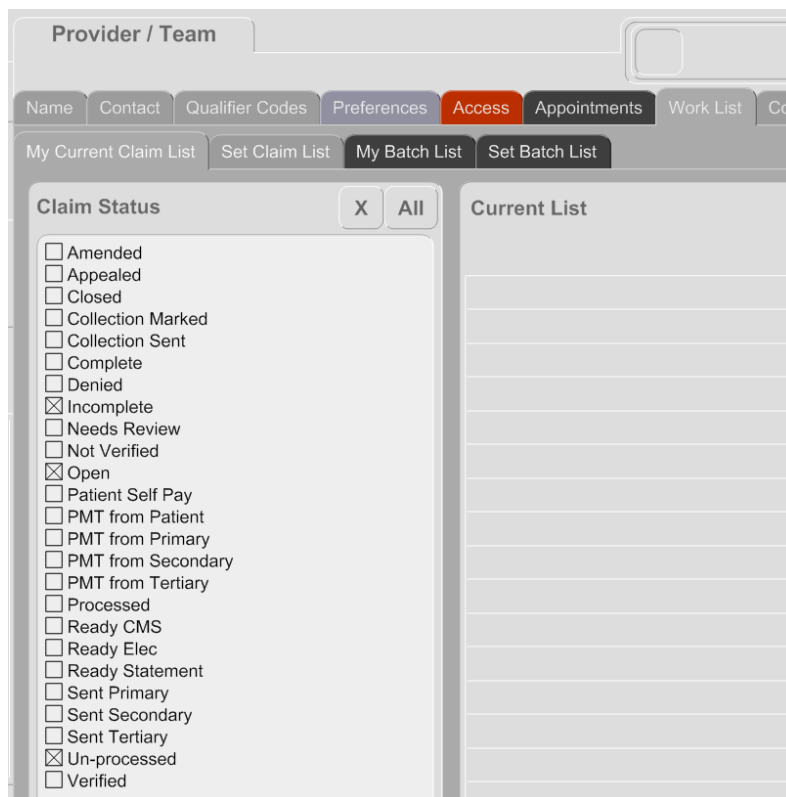


Provider Team Setup

- Appointments can be scheduled not only for patients, but anyone who is part of the Provider/Team setup.



- A claim that is created is put on the work list of the user that created the claim. Claim status is then used to find claims that you want to work on. Claims can also be moved from one person's work list to another.



- If you wanted to pull up only the claims that are “Ready Electronic” on your work list, you would simply uncheck all the other claims by clicking the “X” up at the top, or

Provider Team Setup

individually, and then click the status of the claims that you want to appear on your work list.

The screenshot shows the 'Provider / Team' interface for 'Istrator, Admin'. The 'Access' tab is selected. The 'My Batch List' is active. The 'Claim Status' filter is set to 'All'. The 'Keywords' are 'all'. The 'Date' range is from 08/01/2010 to 01/25/2011. The 'Carrier Selected' field is empty. The 'Show Carrier' button is active. The 'Add all to my Work List' button is active. The 'Remove all from any Work List' button is active. The 'Remove from any Work List' button is active. The 'Add or Subtract from my Work List' button is active. The 'Assigned To' field is 'Istrator, Admin'. The 'Assignment' field is 'Istrator, Admin'. The table below shows a list of claims with columns for 'CL Date', 'Carrier', 'Claim ID', 'Patient Name', 'Status', and 'Assigned To'.

CL Date	Carrier	Claim ID	Patient Name	Status	Assigned To
09/01/2010	CLA87	Jones, J. .	P	Istrator, Admin	
09/24/2010	CLA99	Jones, J. .	P	Istrator, Admin	
10/04/2010	CLA102	Adams, M. .	S	Istrator, Admin	
10/05/2010	CLA103	Munster, H. .	P	Istrator, Admin	
10/20/2010	CLA110	Corbett, R. A.	P	Istrator, Admin	
11/07/2010	CLA111	Cassidy, S. .	P	Istrator, Admin	
01/25/2011	CLA140	Colmax, B. .	P	Istrator, Admin	

The screenshot shows the 'Provider / Team' interface for 'Istrator, Admin'. The 'Access' tab is selected. The 'My Batch List' is active. The table below shows a summary of claims with columns for 'Date', 'Total', 'Complete ID', and 'Others Attached'.

Date	Total	Complete ID	Others Attached
06/15/2011	25.00	N EBA134	
06/09/2011	850.00	N EBA132	
06/09/2011		N EBA133	
03/16/2011	700.00	N EBA130	
09/01/2010	595.00	D EBA123	Y
07/13/2010	250.00	N EBA122	
06/22/2010	1513.00	N EBA120	
06/22/2010	200.00	N EBA121	
06/16/2010	400.00	Y EBA118	
06/16/2010	300.00	D EBA119	
06/01/2010	2200.00	N EBA116	
07/14/2009	715.00	N EBA131	

Provider Team Setup

Provider / Team Istrator, Admin

Name Contact Qualifier Codes Preferences **Access** Appointments Work List Contracts Patients **Ledgers**

My Current Claim List Set Claim List My Batch List Set Batch List

Date From 01/01/2010 To 06/20/2010 Tdy X All Complete Y N D

Date	Total	Complete	ID	Processing Event ID	Assigned to:	Assign
06/16/2010	400.00	Y	EBA118		Istrator, Admin	
06/16/2010	300.00	D	EBA119		Istrator, Admin	

- On the **Contracts**, **Patients** and **Ledgers** tabs you can view activity that is attached to the Provider/Team member account.

Provider / Team Maulder, Kevin L, MD

Name Contact Qualifier Codes Preferences **Access** Appointments Work List **Contracts** Patients Ledgers

Qualifier Requirements Pricing

View details of this Contract

Contract Name	Patient Plan Name	Start	Expires
Medicare MCNM		01/01/2004	12/31/2018

Provider / Team Maulder, Kevin L, MD

Name Contact Qualifier Codes Preferences **Access** Appointments Work List Contracts Patients **Ledgers**

View details of this Patient

Selected Group Medical Clinic of New Mexico Disconnect Assignment

Patient Name	Patient Status	Last Claim	Balance
Anderson, Sandra	Active Collection	04/06/2010	-\$ 10.00
Corbett, Ruth A	Active Collection	10/20/2010	\$ 376.00
Jones, Jonathan	Active Collection	09/24/2010	\$ 434.00

Provider Team Setup

Provider / Team

Maulder, Kevin L, MD
?

Name
Contact
Qualifier Codes
Preferences
Access
Appointments
Work List
Contracts
Patients
Ledgers

Date Range

◀ ▶

All

Group

Medical Clinic of New Mexico

<input type="checkbox"/> AC	<input type="checkbox"/> BP	<input type="checkbox"/> NC	<input type="checkbox"/> PI	<input type="checkbox"/> RC	<input type="checkbox"/> SR
<input type="checkbox"/> AI	<input type="checkbox"/> CL	<input type="checkbox"/> OL	<input checked="" type="checkbox"/> PL	<input type="checkbox"/> RI	<input type="checkbox"/> UN
<input type="checkbox"/> AL	<input type="checkbox"/> HC	<input type="checkbox"/> PA	<input type="checkbox"/> PP	<input type="checkbox"/> RL	<input type="checkbox"/> VL
<input type="checkbox"/> AP	<input type="checkbox"/> HT	<input type="checkbox"/> PC	<input type="checkbox"/> PR	<input type="checkbox"/> RP	

Select a Transaction Code

Transaction
Claim

CHG

ADJ

PMT

317.00

RFD

TAX

Go to Claim	Go to Transaction	TR Code	Balance Responsibility PMT / ADJ Type	Amount	Date	Ref #
Claim #	TR Date		Item Description			
▶ CL45	04/22/2011	▶ PL	Pmt on 15780 DOS 4/6/2010 #878787 for -\$0.00	50.00	P	
▶ CL45	04/22/2011	▶ PL	Pmt on 11111 DOS 4/6/2010 #878787 for \$200.00	40.00	P	
▶ CL45	04/22/2011	▶ PL	Pmt on 11111 DOS 4/6/2010 #878787 for \$200.00	50.00	P	
▶ CL12	04/29/2011	▶ PL	CH #45454544	35.00	1	
▶ CL12	04/29/2011	▶ PL	CA	20.00	P	
▶ CL110	05/05/2011	▶ PL	Pmt on 99212 DOS 10/20/2010 #887888787 for \$190.00	45.00	P	
▶ CL14	06/09/2011	▶ PL	Pmt on 98942 DOS 9/4/2009 #6325	32.00	2	
▶ CL6	06/15/2011	▶ PL	Pmt on 97014 DOS 8/25/2009 #987 for \$25.00	10.00	P	
▶ CL7	06/16/2011	▶ PL	Pmt on 99212 DOS 8/26/2009 #9874 for \$650.00	35.00	P	

ProviderTeam Setup Instructions

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6/7/2011

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