Optimizing Partner
aka What’s New!

Lynne Y. Gratton, CPPM & Randy Lavin
PCC 2016 Users' Conference
Optimizing Partner

Overview

➔ Linking providers from Partner to EHR
➔ External cause codes
➔ autoflag / autoflaglog
➔ oops
➔ Reviewing bills
Overview

➔ Checking eligibility for all patient plans
➔ autopip
➔ ebills
➔ notify
Optimizing Partner
Partner/EHR Provider Linking (6.29)

→ Make sure to link your providers from Partner to the EHR via the Provider table in ted

**PROVIDER INFORMATION**

- **Provider Name:** Elizabeth Casey, M.D.
- **Short Name:** Dr. Casey
- **Last Name:** Casey
- **Initials:** C
- **Prov Group:** Casey
- **EHR User:** Elizabeth Casey, M.D. (elizabeth)
Partner will drop any claims with an external cause code as the primary diagnosis to the Bad Claims report.

- V, W, or Y ICD-10 codes
- When posting charges verify these are not primary
Optimizing Partner autoflag

→ Automatically flag patients
   ◆ Create recaller criteria, select a flag
     ● Inactive flag for patients not seen in 3 years
     ● 18 year olds
     ● VFC flags for patients with Medicaid
Optimizing Partner autoflag

- Automatically flag patients
  - Up to 6 sets available
  - Runs automatically each night
Optimizing Partner
autoflaglog (6.28)

➔ Use autoflaglog to review who was flagged

Speak with your client advocate to set this up for your office.
Optimizing Partner
oops (6.28)

Many changes in oops over the past two years!

➔ Updating CPT code modifiers
  ◆ F5 for Visit Status
  ◆ Select the procedure to update
  ◆ Arrow up on the visit status screen and add your modifier

➔ Make sure to batch a new claim
Changes under F4/F5 Insurance/Visit Status

◆ You can now access a visit by entering the claim ID or date of service.
Optimizing Partner
 Oops (6.29)

→ Changes under F4/F5 Insurance/Visit Status
  ◆ Access policies easily
  ◆ Add/Edit visit notes
Optimizing Partner
oops (6.29)

➔ Visit notes
◆ Add visit specific notes in oops

Pat PCC: 3335  Correct Mistakes – Visit Notes 01/16/16  Page 1 of 1

Search Pattern:  
Search on whole words:  No

06/16/16
Here is my very important note tracking what I have discussed with the insurance company about their lack of payment.

- 01:46 pm pcc  (Modified)
Optimizing Partner oops (7.4)

➔ Visit notes

◆ See them in inscoar, as well as visit totals

[INSCOAR INTERACTIVE SCREEN]

ACCOUNTS WITH BALANCES PENDING Aetna HDHP ()

<table>
<thead>
<tr>
<th>Flintstone, Fred (#1980)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Flintstone, Dino (#3335) (03/29/12) (34DFJH)</td>
</tr>
<tr>
<td>01/16/2016 0.0V Expanded Focus 99213 372.30 D $ 79.00</td>
</tr>
</tbody>
</table>

Visit Notes:
06/16/16 Here is my very important note tracking what I have done with Aetna about their lack of payment.

Billing History:
12/11/14 Aetna HDHP claim batched
03/17/15 Aetna HDHP claim batched by oops
03/21/16 Aetna HDHP HCFA #69 $ 79.00
05/02/16 Aetna HDHP HCFA #105 $ 79.00
Optimizing Partner
oops (7.3)

➔ F2 Generate Claim

◆ Just like F4/F5 when you generate a claim it allows you to enter the claim ID or visit date.

Old School

New options!

Personal: $ 57.00  Correcting Fred Flintstone (# 1980).
Insurance: $ 128.00  There are 802 more items.
Medicaid: $ 0.00  Type item numbers to edit:

Enter Claim ID  Enter Date

Go Back
Optimizing Partner

oops (7.4)

→ See visit totals

<table>
<thead>
<tr>
<th>ITEM</th>
<th>PATIENT</th>
<th>PROCEDURE</th>
<th>DIAG</th>
<th>SVC</th>
<th>BIL</th>
<th>AMOUNT</th>
<th>SUM DUE</th>
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<td>99213 0V Expanded Focu 372.30 D D 79.00 79.00</td>
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Optimizing Partner oops (6.29)

Viewing CPT codes on the first screen

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Optimizing Partner oops (6.29)

→ Viewing CPT codes on the first screen

◆ ced allows you to turn this feature off
Optimizing Partner
Review/Work with Bills (7.3)

→ Review personal bills before printing/submitting
Optimizing Partner Review/Work with Bills (7.3)

Like persview, but new options
Optimizing Partner
Review/Work with Bills (7.3)

→ Preview bill

PCC Pediatric Test Associates

Your account is now 90 days past due. Please contact our office to establish payment arrangements and to avoid further action.

<table>
<thead>
<tr>
<th>Billing Date</th>
<th>Pay</th>
<th>Pmt Method</th>
<th>Card#</th>
<th>Sig</th>
</tr>
</thead>
<tbody>
<tr>
<td>06/24/16</td>
<td>S</td>
<td>MasterCard</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Keith Batz
41 Carousel Circle
Brandon, VT 05733

Send
PCC Pediatric Test
20 Winooski Falls
Suite 7
Winooski, VT 05404
(800) 722-1082

Please Detach And Return Top Portion With Your Payment

<table>
<thead>
<tr>
<th>Date of Service</th>
<th>Description of Services From</th>
<th>Charges</th>
<th>Payments &amp; Due Fr</th>
</tr>
</thead>
<tbody>
<tr>
<td>01/01/06 to 11/28/10</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

BALANCE FORWARD

Trevor Batz (Dr. Jones, Office)
07/21/10 OV Expanded Focus

$44.00
Optimizing Partner
Review/Work with Bills (7.3)

➔ After working with bills, prepare again so changes are taken into account.

Messages:

Exited Working with Accounts. Prepare Bills again to generate bills or Work with Accounts.
Optimizing Partner
Review/Work with Bills (7.3)

<table>
<thead>
<tr>
<th>Acct #: 1601</th>
<th>Print Personal Bills – Hold Bill</th>
</tr>
</thead>
<tbody>
<tr>
<td>First: Keith</td>
<td>Home Phone: 802-555-0137</td>
</tr>
<tr>
<td>Last: Batz</td>
<td>Work Phone: 802-555-0103</td>
</tr>
<tr>
<td>Addr: 41 Carousel Circle</td>
<td>Cell Phone: 802-555-0163</td>
</tr>
<tr>
<td>Addr:</td>
<td>Emg Phone: 802-555-0116</td>
</tr>
<tr>
<td>City: Brandon</td>
<td></td>
</tr>
<tr>
<td>State: VT</td>
<td>Status:</td>
</tr>
<tr>
<td>Zip Code: 05733</td>
<td>Last Service: Aug 8, 2011</td>
</tr>
<tr>
<td></td>
<td>Last Bill Sent: Nov 1, 2011</td>
</tr>
<tr>
<td></td>
<td>Last Pers Pmt: Aug 8, 2011</td>
</tr>
<tr>
<td></td>
<td>Last Ins Pmt: Aug 29, 2011</td>
</tr>
<tr>
<td>Hold Bill Till: Jun 24, 2016</td>
<td>Updates the Hold Bill Till field in the Family Editor (fame).</td>
</tr>
</tbody>
</table>
Optimizing Partner
Review/Work with Bills (7.3)

➔ ced option under Personal Bills for the default date to hold until.

23. How many days ahead should the date be populated for Hold Bill when Working with Accounts? (Examples: 0 = today, 1 = tomorrow, 5 = five days from now) 0
Optimizing Partner
Eligibility for all plans (7.4)

Pat PCC: 409 Patient Eligibility

Patient: Andrew Rudolph (M 10/21/1998)
PCP: None Subscriber: Barbara R.
Appointment: 06/21/16 2:45pm Medication Followup

<table>
<thead>
<tr>
<th>Copay Insurance Company</th>
<th>Certificate #</th>
<th>Group</th>
</tr>
</thead>
<tbody>
<tr>
<td>X 10.00 Aetna PPO $10</td>
<td>83482736472</td>
<td>XXYYZZ</td>
</tr>
<tr>
<td>10.00 BCBS $15 OV&amp;WC-other</td>
<td>IUS044464686</td>
<td>RUD863</td>
</tr>
</tbody>
</table>

Notes: Status: __________________ Date Verified: __________

On-Demand eligibility report available by pressing F6.

Check all policies!