

ced Top 10 #4 – Function Keys

Pat PCC (#100) Checkin - Demographics Step 1 of 5

First Name: John Born: Sep 20, 2000
 Last Name: Canning Age: 12 yrs, 6 mos
 Physician: Sex: Male
 Status: Chronic

SSN: Alt Name: School: Chart #: 01409

Patient Lives with, and Bills Sent to, John Canning (#1)

Status: Home Phone: 802-250-8812
 Addr: 584 Water Street Work Phone: 802-335-5981
 City: Irasburg Cell Phone: 802-168-7746
 State: VT Zip Code: 05845 Emg Phone: 802-560-1950
 Email:

Here

Next Edit Edit Reassign Make Reprint Billing
 Step Patient Account Account Appt Enc Form FKey Set

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Checkin - Copay and Balance Step 5 of 5

***** COPAY: \$15.00 *****

Policy: Highmark PPO Blue \$15

***** PERSONAL BALANCE: \$302.00 *****

Account: John Canning (#1)

AGING	0-29	30-59	60-89	90-119	120+	CREDIT	BALANCE
PER:	302.00	0.00	0.00	0.00	0.00	0.00	302.00
INS:	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Med:	0.00	0.00	0.00	0.00	0.00	0.00	0.00

Here

Finish Show TOS Print
 Checkin Detail Payments

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SAM Search Criteria

X Name: John Canning Visit Reason: PCP Provider: N Mins: L: O

Time Frame: / /

PATIENT: John Canning PAT STATUS: Chronic LAST PHYS: 08/06/12
 DOB: 09/20/2000 CUST STATUS: NEXT APPT:
 AGE: 12 yrs, 6 mos GUAR STATUS:

CUST: John Canning GUAR: John Canning
 584 Water Street 584 Water Street
 Irasburg, VT 05845 Irasburg, VT 05845

H: 802-250-8812 PERS BAL: \$ 302.00 H: 802-250-8812 PERS BAL: \$ 302.00
 W: 802-335-5981 INS BAL: \$ 0.00 W: 802-335-5981 INS BAL: \$ 0.00

PRI: Highmark PPO Blue \$15 CERT: ZAR103279114001 GRP: Mar842
 SEC: CERT: GRP:

School: SSN: Here
 Alt Name: Chart #: 01409
 MISS: 2 CANC: 1 (10/29/12, John, Asthma Recheck)

Schedule Inquire Find Next Demo- Clear
 Relation graphics

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ced Top 10 #4 – Function Keys

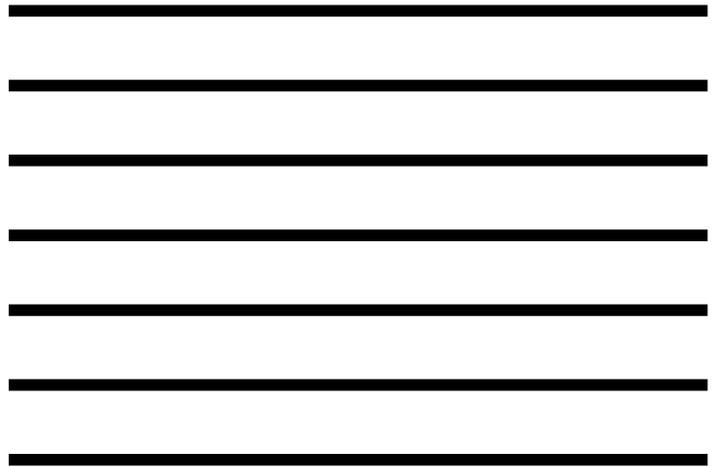
INSURANCE charges for John Canning
Acct Status: Pat Status: Chronic

#	Date	Prv Code	Procedure Name	Diagnosis Name	Amount	Amt Due
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There are 0 more charges for this patient.
T)OS HCFA, H)CFA, P)am, I)nsurance Policy, Q)uit, or numbers to make payment on:
>

Here

Next Claim Batch Claim Print Claim Print A Bill Correct Mistake Post A Refund



ced Top 10 #4 – Programmable Function Keys

- All of the previous screens are places you can add links to most other Partner programs.
 - fame – Billing notes page
 - notjane – Patient notes page
 - oops, pam, inquire, elig, policy, and more!



ced Top 10 #5a – TOS Receipts - checkout

- Are you are always asked this question when posting charges?

Hang on a second while I do some error checking...
No errors detected...
Saving the charges for John Canning
Would you like to print a Time of Service bill?



ced Top 10 #5a – TOS Receipts - checkout

CHARGE AND PAYMENT POSTING CONFIGURATION

CHUCK CONFIGURATION

4. When do you want a TOS bill printed?
Never: Never print a TOS bill
Maybe: Print the bill if the patient does not have insurance
Sometimes: Ask about printing each bill
Always: Always print a TOS bill

Sometimes

Change that answer to Never and then...

ced Top 10 #5a – TOS Receipts - checkout

Checkout - Wrap Up

PATIENT: John Canning VISIT DATE: May 3, 2013
Status: Chronic

Messages:
Posted \$ 101.00 of charges.
New personal balance is \$173.00.
New insurance balance is \$365.00.
Primary insurance is Highmark PPO Blue \$15.
Added a claim to the BCBS HCFA batch.

Use this function key instead!

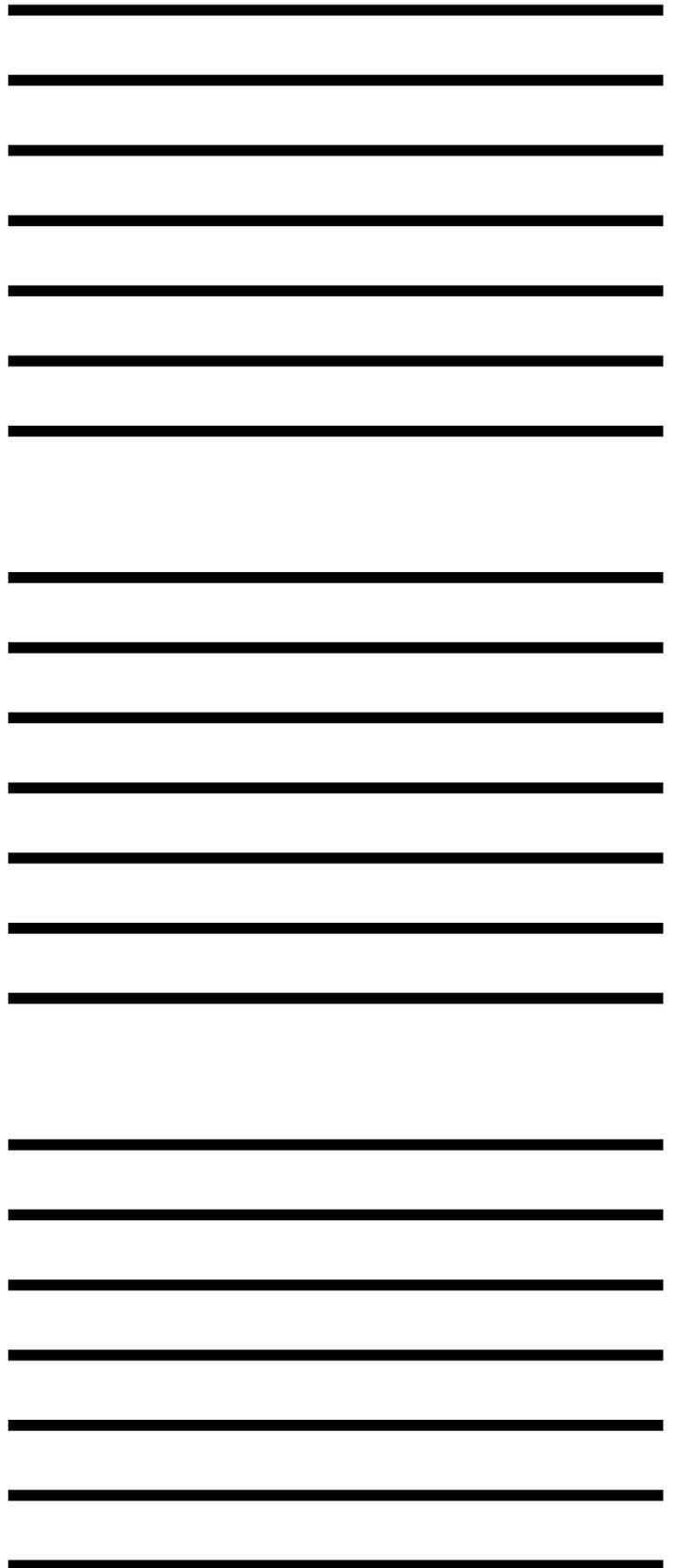
Next Correct Print Print Post Reg Patient Account Pedi
Visit Mistakes TOS Bill TOS HCFA Payments Forms Forms Advisor

ced Top 10 #5b – TOS Receipts - checkin

- checkin has the same option, but Sometimes here makes more sense.

CHECKIN CONFIGURATION

12. When do you want a receipt printed? Sometimes
Never: Never print a receipt
Sometimes: Ask about printing a receipt
Always: Always print a receipt



ced Top 10 #6 – Change checkout screen order

- Force staff to review policies first

CHUCK CONFIGURATION

56. In what order should the chuck pages be displayed?
(D=Demographics, E=Eligibility, P=Policies, M=Main)
PMDE

- Main = Posting Charges Screen

ced Top 10 #7 – Configurable labels-fame

- Accounts have 10 fields with configurable labels, 4 phone, 6 free

First: John
Last: Canning
Addr: 584 Water Street
City: Irasburg
State: VT Zip Code: 05845
Email:
Status:

Phone Lbl 1:	802-250-8812
Phone Lbl 2:	802-335-5981
Phone Lbl 3:	802-168-7746
Phone Lbl 4:	802-560-1950

Config Box 1:	
Config Box 2:	
Config Box 3:	
Config Box 4:	
Config Box 5:	
Config Box 6:	

Last Service:	Feb 5, 2013
Last Bill Sent:	
Last Pers Pmt:	Feb 5, 2013
Last Ins Pmt:	Dec 4, 2012
Hold Bill Till:	
Budget Amt:	

ced Top 10 #7 – Configurable labels-fame

FAME & ADDACCOUNT CONFIGURATION

32. What is the title for the first phone number:
Phone Lbl 1
33. What is the title for the second phone number:
Phone Lbl 2
34. What is the title for the third phone number:
Phone Lbl 3
35. What is the title for the fourth phone number:
Phone Lbl 4

ced Top 10 #7 – Configurable labels-frame

FAME & ADDACCOUNT CONFIGURATION

- 36. What is the title for the first account-specific box:
Config Box 1
- 37. What is the title for the second account-specific box:
Config Box 2
- 38. What is the title for the third account-specific box:
Config Box 3
- 39. What is the title for the fourth account-specific box:
Config Box 4
- 40. What is the title for the fifth account-specific box:
Config Box 5
- 41. What is the title for the sixth account-specific box:
Config Box 6



ced Top 10 #8 – Configurable labels- notjane

- Patients have 4 fields with configurable labels.

First Name:	John	Born:	Sep 20, 2000
Last Name:	Canning	Age:	12 yrs, 7 mos
Physician:		Sex:	Male
Status:	Chronic		
Conf Box 1:		Conf Box 3:	
Conf Box 2:		Conf Box 4:	01409



ced Top 10 #8 – Configurable labels- notjane

NOTJANE CONFIGURATION

- 12. What label should be used for the first customizable field?
Conf Box 1
- 13. What label should be used for the second customizable field?
Conf Box 2
- 14. What label should be used for the third customizable field?
Conf Box 3
- 15. What label should be used for the fourth customizable field?
Conf Box 4



ced Top 10

#9 – checkout Wrap Up Screen

- You can disable any of the function keys on the Wrap Up screen in checkout.

Checkout - Wrap Up
PATIENT: John Canning VISIT DATE: May 3, 2013
Status: Chronic

Messages:
Posted \$ 101.00 of charges.
New personal balance is \$208.00.
New insurance balance is \$365.00.
Primary insurance is Highmark PPO Blue \$15.
Added a claim to the BCBS HCFA batch.

Next Visit	Correct Mistakes	Print TOS Bill	Print TOS HCFA	Post Reg Payments	Patient Forms	Account Forms	Pedi Advisor
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ced Top 10

#9 – checkout Wrap Up Screen

- You can disable any of the function keys on the Wrap Up screen in checkout.

System Files Charge / Payment Posting Page 10 of 25

CHUCK CONFIGURATION

60. Which function keys should be disabled on the wrap-up screen?
2,4,5

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ced Top 10

#9 – checkout Wrap Up Screen

- You can disable any of the function keys on the Wrap Up screen in checkout.

Checkout - Wrap Up
PATIENT: John Canning VISIT DATE: May 3, 2013
Status: Chronic

Messages:
Posted \$ 101.00 of charges.
New personal balance is \$208.00.
New insurance balance is \$365.00.
Primary insurance is Highmark PPO Blue \$15.
Added a claim to the BCBS HCFA batch.

Next Visit	<input type="checkbox"/>	Print TOS Bill	<input type="checkbox"/>	<input type="checkbox"/>	Patient Forms	Account Forms	Pedi Advisor
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ced Top 10

#10 – Notify–automatic cancel

- If you use notify (and if you aren't using it, why not?) appointments can be automatically canceled!

System Files

[Patient Notification Center](#)

Page 5 of 5

RESPONSE CONFIGURATION

16. Automatically mark appointments as canceled when patients choose the option to cancel from their Appointment Reminder Message.

Yes



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Configuration Editor (ced)

Top 10

- Can you break Partner by changing ced?
 - It depends on the question. Those in the Top 10? No.
- Want to discuss changes first?
 - Call support and ask for Charley!



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