

PCC 2013 Users' Conference

Configuration Editor (ced) Top Ten Picks to Change to Make Partner Better for Your Office



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Configuration Editor (ced) Top 10

- What is ced?
- How many configuration files are there for Partner?



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Configuration Editor (ced) Top 10

System Configuration File Editor		Page 1 of 1
0) Quit	19) Claims Program Electronic (ecs)	
1) Practice Config	20) Third Party Vendor Config	
2) Printing Config	21) PCC EHR Config	
3) Patients/Accounts (notjane/fame/	22) Patient Notification Center(notify)	
4) Charges/Payments (chuck)	23) HCFA - Other (other)	
5) Encounter Forms (encount)	24) HCFA - Aetna (aetna)	
6) Patient Check In (checkin)	25) HCFA - BCBS (bcbs)	
7) Scheduling Program (sam)	26) HCFA - CIGNA (cigna)	
8) Scheduling Reports (scan/chart/f	27) HCFA - Humana (humana)	
9) Appt Summarizer (appts)	28) HCFA - UHC (uhc)	
10) Account Histories (tater)	29) ECS - Aetna (ecsaetna)	
11) Collection Report (coll)	30) ECS - BCBS (ecsbcbcs)	
12) Patient Histories (patinfo)	31) ECS - CIGNA (ecscigna)	
13) Daysheets (daysheet)	32) ECS - Humana (ecshumana)	
14) Daysheets Monthly (daysheet)	33) ECS - Availity (ecsotther)	
15) Deposit Slips (deposit)	34) ECS - Capario (ecsotther)	
16) Bills - Paper (bills)	35) ECS - Emdeon (ecsotther)	
17) Bills - Electronic (ebs)	36) ECS - UHC (ecsuhc)	
18) Claims Program Paper (hcfa)	37) Immunization Registry (immsreg)	

Your choice:



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ced Top 10 #1 - Autoposting (autopip)


- Want to know what you are autoposting vs manually posting?

System Files Charges/Payments (chuck) Page 29 of 30

AUTOPIP CONFIGURATION

114. What is the default payment type for autopip? This will override PIP DEFPMT is filled in.
■

115. What is the default adjustment type for autopip? This will override PIP DEFADJ is filled in.
■

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ced Top 10 #2 - Autoposting (autopip)


- Are too many CARC codes dropping to manual you think should autopost?

System Files Claims Program Electronic (ecs) Page 5 of 6

ECS CONFIGURATION

30. Which 139/411 adjustments reasons can be automatically posted?
45,24

31. Which CARC codes should be ignored for posting purposes?
45,161

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ced Top 10 #3 – Adding CARC's to pip

- Do you not have fields in pip to enter CARC codes?

INSURANCE charges for John Canning Date of Payment: 04/18/13
Acct Status: Pat Status: Chronic

DATE	PROCEDURE	CHARGED	ALLOWED	COPAY	ADJUST	PAYMENT	BALANCE
12/01/12	99214	\$ 72.00		\$ 15.00			
	94010	\$ 70.00					
	94375	\$ 28.00					
TOTALS:		\$ 170.00		\$ 15.00			

Payment Type: Ins Pmt Current Insurance: Highmark PPO Blue \$15
Adjust Type: Ins Adj Next Insurance: Personal
Allow Schedule: None Check Number: ■

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ced Top 10 #3 – Adding CARC's to pip

- Update this question to include the CARC row.

System Files Charges/Payments (chuck) Page 18 of 30

PIP CONFIGURATION

84. Which columns should appear by default?
(P=Pmt, A=Adj, C=CARC, B=Bal, W=Whold)

PAC

ced Top 10 #3 – Adding CARC's to pip

- And see the CARC row appear!

INSURANCE charges for John Canning Date of Payment: 05/15/13
Acct Status: Pat Status: Records

DATE	PROCEDURE	CHARGED	ALLOWED	COPAY	PAYMENT	ADJUST	BALANCE
05/06/13	99213	\$ 56.00					
TOTALS:		\$ 56.00					

CARC: [] [] [] []

CARC: [] [] [] []

Payment Type: Ins Pmt Current Insurance: North American Health
Adjust Type: Ins Adj Next Insurance: Personal
Allow Schedule None Check Number: [] [] [] []

ced Top 10 #4 – Function Keys

- What do the following function keys have in common?

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: Addr: 584 Water Street Home Phone: 802-250-8812
Addr: 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 Step Edit Patient Edit Account Reassign Account **Make Appt** Reprint Enc Form Billing FKey Set

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ced Top 10 #4 – Function Keys

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

Finish Checkin **Show Detail** TOS Payments Print

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ced Top 10 #4 – Function Keys

SAM Search Criteria

X Name Visit Reason PCP Provider Mins L
John Canning N 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
Irassburg, VT 05845 Irassburg, 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: Alt Name: Chart #: 01409
MISS: 2 CANC: 1 (10/29/12, John, Asthma Recheck)

Schedule Inquire Find Next Demo-Relation graphics **Clear**

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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
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



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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!



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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?



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ced Top 10 #5a – TOS Receipts - checkout

System Files Page 1 of 30

Charge / Payment Posting


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...

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ced Top 10 #5a – TOS Receipts - checkout


Checkout - Wrap Up VISIT DATE: May 3, 2013

PATIENT: John Canning
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 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 #5b – TOS Receipts - checkin


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

System Files Page 4 of 4

Patient Check In

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

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ced Top 10 #6 – Change checkout screen order

- Force staff to review policies first

System Files Charge / Payment Posting Page 12 of 30

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

Acct PCC: 1 The Family Editor Page 1 of 5

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

System Files Account / Patient Editing Page 10 of 17

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-fame

System Files

[Account / Patient Editing](#)

Page 10 of 17

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



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ced Top 10 #8 – Configurable labels- notjane

- Patients have 4 fields with configurable labels.

Pat PCC: 100

Patient Editor

Page 1 of 4

First Name: John

Last Name: Canning

Physician:

Born: Sep 20, 2000

Age: 12 yrs, 7 mos

Sex: Male

Status: Chronic

Conf Box 1:

Conf Box 2:

Conf Box 3:

Conf Box 4:

01409



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ced Top 10 #8 – Configurable labels- notjane

System Files

[Account / Patient Editing](#)

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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



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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	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](#)

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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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