

Partner Pointers For Newbies

Randy Lavin

UC 2014

New User Tips for...

- Demographic and Account Management
- Checkin and Checkout
- Billing Tools
- Miscellaneous Partner Tips
- Underused Partner Programs
- Configuration and Setup Tips

Demographics and Account Management

Addr:	Physician's Computer Company		
Addr:	1 Main St., Suite 7		
City:	05404		
State:		Zip Code:	

↓

Addr:	Physician's Computer Company		
Addr:	1 Main St., Suite 7		
City:	Winooski		
State:	VT	Zip Code:	05404

Find a City and State by Entering the Zip Code



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Demographics and Account Management

Please enter an account:

First Name: Pcc

Last Name: 370

Use Patient and Account PCC Numbers



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Demographics and Account Management

Print Duplicate Accts/Pats	(duplicates)
Sort New Patient List	(prsort)
Sort New Account List	(crsort)

Sort Your Patient and Account Lists



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Demographics and Account Management

Acct PCC: 254

The Family Editor

First: Ronald & Alice

Last: Anderson

Search By Both Parent Names



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Demographics and Account Management

First	Last	View: Primary Insurance
		Plan Name Certificate
1. Johnny	Dalgewicz	BCBS/BOX 9196 \$5 028350402
2. Joshua	Davis	
3. Johanna	Deazevedo	One Health Plan \$10 105652525
4. Johan	Delacruz	
5. Joseph	Disick	
6. Johnny	Dough	

First	Last	View: Custodian
		Custodian Cust Phone
1. Johnny	Dalgewicz	Annmarie Dalgewicz 802-700-0228
2. Joshua	Davis	Betsy Aoun-Wathne 802-919-4580
3. Johanna	Deazevedo	Jill E Waite 802-807-9333
4. Johan	Delacruz	Mark Delacruz 802-443-2141
5. Joseph	Disick	
6. Johnny	Dough	

First	Last	View: Patient Address
		Address City
1. Johnny	Dalgewicz	94 Myrtle Street Sheldon
2. Joshua	Davis	167 Lexington Rd Charlotte
3. Johanna	Deazevedo	4 Pulver Drive Huntington
4. Johan	Delacruz	70 Woodlawn St Fair Haven
5. Joseph	Disick	7 Crowdis St Bomoseen
6. Johnny	Dough	1 Main St., Suite 7 Winooski

Please enter your choice: 1

Quickly Review Information from Multiple Search
Results



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Checkin and Checkout

Pat PCC (#2974)		Checkin - Demographics		Step 1 of 3	
First Name:	Pebbles	Born:	Dec 2, 2001		
Last Name:	Flinstone	Age:	5 yrs, 10 mos		
Physician:		Sex:	Female		
Status:	Medicaid, Needs Extra Time				
SSN:	888-88-8888	Alt Name:	Rubble		
School:	Bedrock Elementary	Chart #:	09533		
Patient Lives with, and Bills Sent to, Fred Flinstone (#149)					
Status:	Budget				
Addr:	479 Granite Avenue	Home Phone:	800-722-1370		
Addr:		Work Phone:	800-722-1082		
City:	Bedrock	Cell Phone:	800-722-1082		
State:	VT	Zip Code:	05056	Emg Phone:	802-722-1082
Next Step	Edit Patient	Edit Account	Reassign Account	Make Appt	Reprint Enc Form
				Billing FKey Set	

Use the Checkin Program



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Checkin and Checkout

Post Copays and Other Personal Payments in at Least
Four Different Ways

- From the Checkin Main Screen
- During the Checkin Process
- During the Checkout Process
- From Personal Payments (pam)



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Checkin and Checkout

Diagnosis Name		Procedure Name
a	Otitis Media	OV Problem Focus
b x	Foreign Body Ear	OV Expanded Focus
c	Gastroenteritis	
d	Fever Unknown	b Rem*
e	Bronchitis	

↓

Diagnosis Name		Procedure Name	Dx Code
a	Otitis Media		
b x	Foreign Body Ear	Rem'L Splinter Foot	
c	Gastroenteritis	Removal Cerumen Impacted	
d	Fever Unknown	Removal Foreign Body Ear	
e	Bronchitis	Removal Foreign Body Eye	
f		Removal Foreign Body Nos	
g			
h	Uri	Throat Culture	

Search For Diagnoses and Procedures Quickly



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Checkin and Checkout

	Diagnosis Name		Procedure Name	Dx Code	CPT Code	Charge
a	Viral Syndrome	c	OV Problem Focus	382.9	99212	\$ 50.00
b	Gastroenteritis		OV Expanded Focus			
c	Otitis Media					

Post Diagnoses Without Selecting Them



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Checkin and Checkout

Checkout - Claim Information							
PATIENT: Pebbles Flinstone	PHYSICIAN: Dr. Casey						
VISIT DATE: November 1, 2007	BILLING: Dr. Casey						
VISIT REASON: Sick Call	POS: Office						
Referring Provider: Stacy A. Forrest, M.D.							
INSURANCE INFO							
Prior Auth. Number: 5544332AX2	HOSPITAL						
Resubmission Number:	Admit:						
Reference Number:	Discharge:						
Claim Delay Reason:	ACCIDENT INFO						
Accept Assignment?	Accident Date:						
LABORATORY WORK	Auto Accident?						
Was lab work done?	Acc. State:						
Cost of Lab Work:	STATUS						
DISABILITY INFORMATION	Marital Status:						
Disabled Start:	Employment Status:						
Disabled End:	Emergency Visit?						
REPEAT VISIT	Worker's Comp?						
Date First Seen:	Related to Employment?						
	EPSDT Referral:						
Save	Refer	Authoriz	Disabled	Hospital	Accident	Worker's	Set Jump
	Provider	Number	Start	Admit	Date	Comp	Point

Enter Claim Information While Posting



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Billing Tools

Eligibility Appointment List
04/21/09 - Tuesday
Appt 1 of 55

Time	Patient	Ins Group	Elig Response	I/A	Elig Status	Verified
9:00am	Lastname, Firstname	Neighborhood				
9:00am	Lastname, Firstname	Tufts				
9:10am	Lastname, Firstname	MA Medicaid	04/21/09	A		
9:10am	Lastname, Firstname	MA BCBS	04/21/09	A		
9:20am	Lastname, Firstname	MA Medicaid	04/21/09	A		
9:30am	Lastname, Firstname	Private Pay				
9:40am	Lastname, Firstname	MA BCBS	04/21/09	A		
9:40am	Lastname, Firstname	BMC Healthne				
10:00am	Lastname, Firstname	MA BCBS	04/21/09	A		
10:00am	Lastname, Firstname	BMC Healthne				
10:10am	Lastname, Firstname	MA BCBS	04/21/09	A		
10:10am	Lastname, Firstname	BMC Healthne				
10:20am	Lastname, Firstname	BMC Healthne				
10:30am	Lastname, Firstname	RI BCBS				
10:40am	Lastname, Firstname	RI BCBS				
10:40am	Lastname, Firstname	MA Medicaid	04/21/09	A		
11:00am	Lastname, Firstname	MA BCBS	04/21/09	A		

Insurance Policy Inactive, Active or Unknown

Select Patient Sort Settings Display Settings

Verify Insurance Eligibility



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Billing Tools

13)	04/26/05	C	Johnny	OV Problem Focus	382.9	C	50.00	10.00
14)			06/15/05	Personal Bill				
15)			05/24/05	Ins Pmt -- USHC #44523		C	31.00	
16)			05/24/05	Ins Adj -- USHC #44523		C	9.00	
17)			04/26/05	USHC ECS				
18)			04/26/05	Claim (from USHC) to proxymed				
19)			04/26/05	USHC claim batched				

Hide/Show Billing History in 'oops'



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Billing Tools

```
51)      P  Female Baby  ADMIN FIRST IMMUN <8y V20.2  J   25.00   25.00
52)      10/04/06 Payor Reject Claim: ACKNOWLEDGEMENT/RETURNED AS UNP
53)      10/02/06 PROXYMED Accepted Claim: CLAIM HAS BEEN FORWARDED T
54)      10/02/06 MVP ECS#66129
55)      10/02/06 Claim (from MVP) to PROXYMEDmvp
```

Rejection From Payor (MVP)

Review ECS Reports Within 'oops'



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Checkin and Checkout

Run 'oops' in Different Ways

- 'oops' – By Account Name
- 'oopsp' – By Patient Name
- 'oops -k' – For One Patient



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Billing Tools

Changing Visit Information							Page 1 of 3
Fred Flintstone							
PATIENT	PROCEDURE NAME	DIAG	SVC	BIL	AMOUNT	SUM DUE	
02/13/13							
32) C Dino	Well Child 1-4 yrs	V20.2	C	C	135.00	0.00	
	CPT:99392	Bill Prov:	Elizabeth Casey, M.D.				
ICD-9 Dx 1:	Well Infant/Child Care						
ICD-9 Dx 2:	-						
ICD-9 Dx 3:	-						
ICD-9 Dx 4:	-						
02/13/13							
41) Dino	Vision Screen	V72.0	C	C	10.00	0.00	
	CPT:99173	Bill Prov:	Elizabeth Casey, M.D.				
ICD-9 Dx 1:	Vision Exam						
ICD-9 Dx 2:	-						
ICD-9 Dx 3:	-						
ICD-9 Dx 4:	-						

Change Visit and Charge Information

from 'oops'



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Billing Tools

Enter a Claim ID:

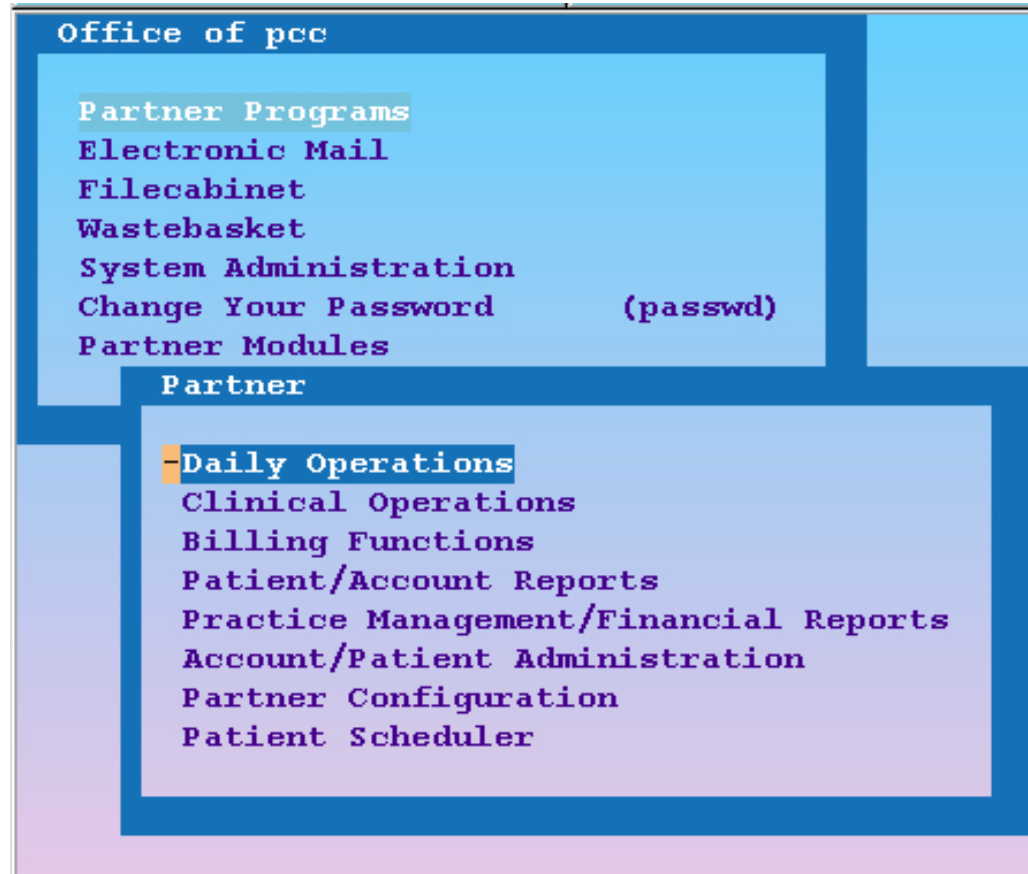
Post Insurance Payments by
Claim ID Number



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Miscellaneous Partner Tips



Jump to a Program in Partner Windows



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Miscellaneous Partner Tips



Run Any Partner Program From

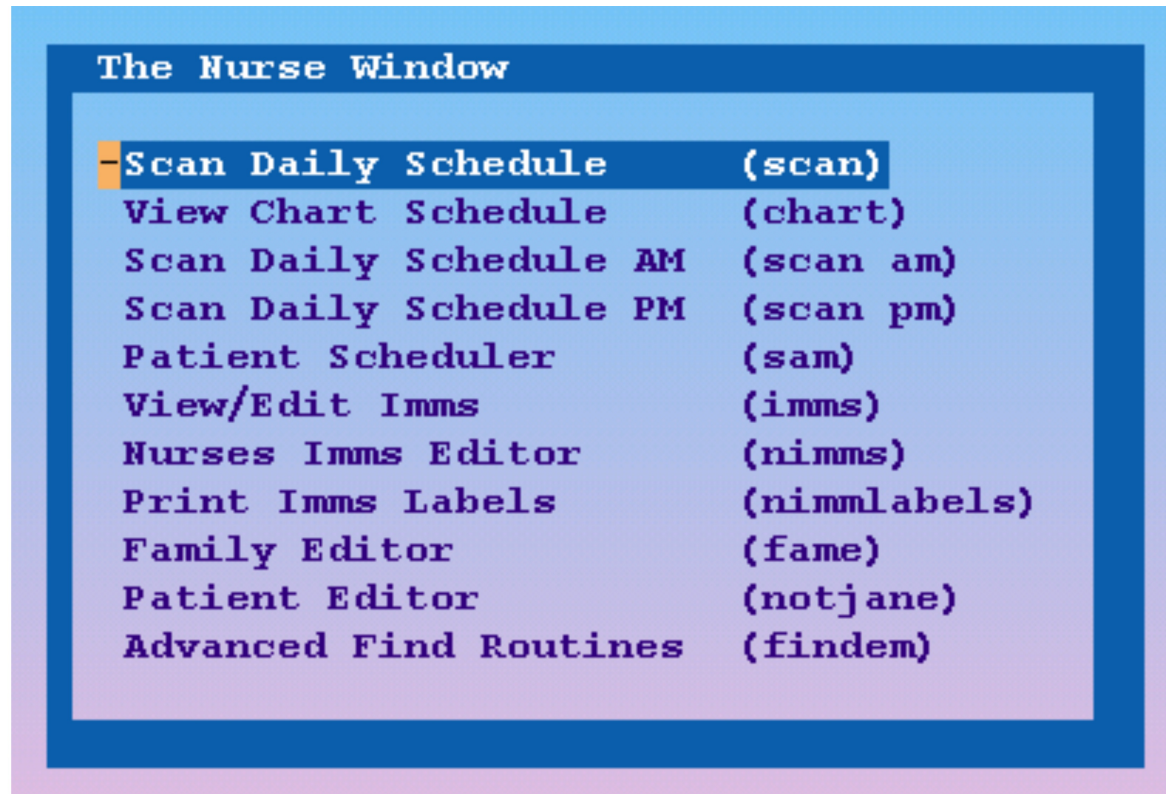
Any Window



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Miscellaneous Partner Tips



Create a Custom Window with Your Own List of Programs



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Miscellaneous Partner Tips

Run Programs by Account Or By Patient

- oops oosp
- pam Pam
- refund Refund



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Underused Partner Programs

OUTSTANDING CHARGES:	DIAG	PROV	AMOUNT	PERS DUE	INS DUE
01/15/00 Amoroso, Harrison OV Highly Compreh	V20.2	Nurs	125.00	65.00	0.00
11/05/00 Amoroso, Michael Urine Culture	599.0	DoLi	18.00	0.00	18.00
OV Expanded Focus	599.0	DoLi	60.00	0.00	60.00
11/11/00 Amoroso, Robinson Physical 12-17 yrs	V20.2	Trap	125.00	0.00	125.00
TOTAL AMOUNT DUE				65.00	203.00
RECENT PERSONAL PAYMENTS:	CK NUMBER		AMOUNT		
11/09/00 TOS Cash			20.00		
07/27/00 TOS Cash			40.00		

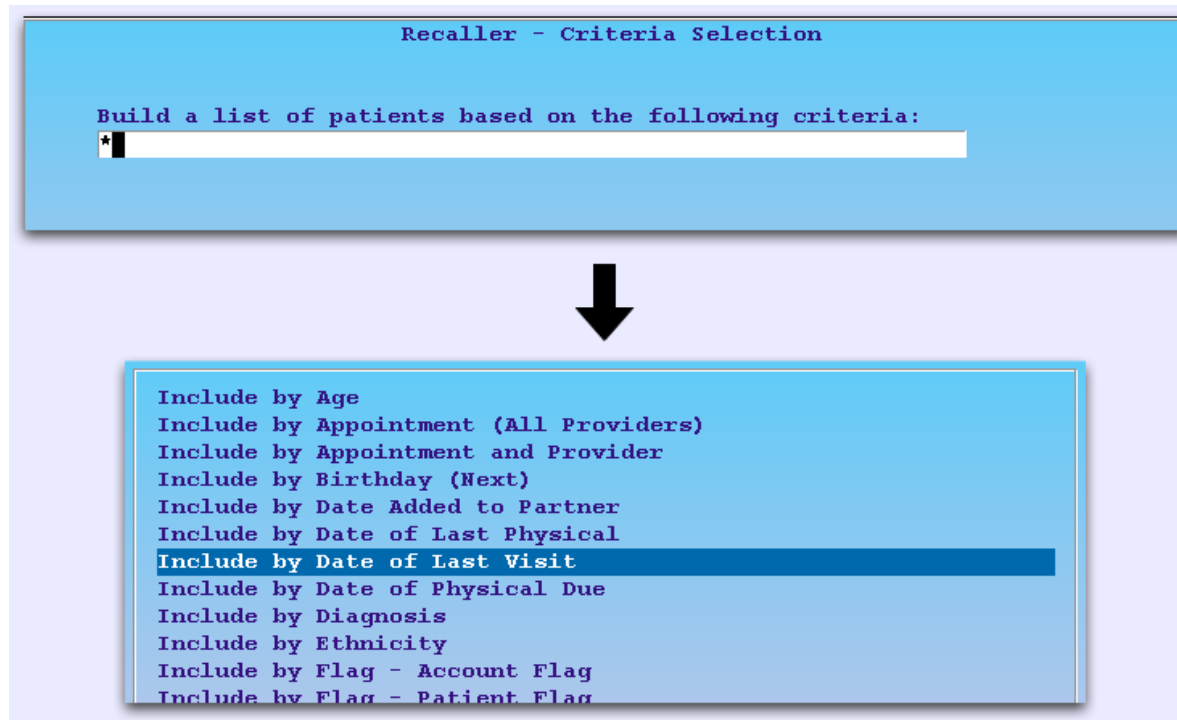
Use the Collection Report to Review Account
Balance Details and Recent Payments



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Underused Partner Programs



Use the Recaller for Immunization Recalls or Physical Reminders



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Underused Partner Programs

Page Up		F12			Page Down	
WORKING WITH *INDIVIDUAL* ACCOUNTS						
Name	Current	30..59	60..89	90..119	120+	Total
X Rickman, Karlee	\$ 0.00	\$ 0.00	\$ 0.00	\$ 270.00	\$ 806.00	\$1076.00
Chambers, Raushan	\$ 0.00	\$ 50.97	\$ 0.00	\$1017.14	\$ 0.00	\$1068.11
Ganey, Tajh	\$ 91.00	\$ 0.00	\$ 127.00	\$ 101.00	\$ 610.65	\$ 929.65
Hairston, Teryl	\$ 268.00	\$ 177.00	\$ 181.00	\$ 281.00	\$ 0.00	\$ 907.00
Alanis, Marguita	\$ 0.00	\$ 0.00	\$ 64.00	\$ 0.00	\$ 840.00	\$ 904.00
Gear, Tamaya	\$ 0.00	\$ 240.00	\$ 505.00	\$ 0.00	\$ 0.00	\$ 745.00
Hursey, Tomi	\$ 101.00	\$ 320.00	\$ 322.50	\$ 0.00	\$ 0.00	\$ 743.50
Gordon, Denna	\$ 0.00	\$ 50.00	\$ 50.00	\$ 25.00	\$ 612.25	\$ 737.25
Burnes, Annette	\$ 0.00	\$ 0.00	\$ 127.00	\$ 496.40	\$ 113.60	\$ 737.00

Use 'persview' to Work Down

Personal Balances



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Underused Partner Programs

	0 - 29	30 - 59	60 - 89	90 - 119	120+	Totals
Personal:	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 145.00	\$ 145.00
Insurance:	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 647.00	\$ 647.00
Medicaid:	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00
Save	Collectn Report	Notes	Account Forms	Depend	Account History	

Use the Account History Report to Untangle Problem
Accounts

Configuration and Setup Tips

PEDIATRIC ASSOCIATES OF VERMONT

PROVIDER: Peter Zhivago, M.D.

APPT DATE: 07/11/2001

APPT TIME: 4:50p

REASON: 6 Year Exam

ARRIVAL: _____

APPT NOTE: Called with stomach pains.

CHECK IMMS: MMR, DTAP

PATIENT: **Pebbles Flinstone**

BORN: 12/13/1994

AGE: 6 yrs, 6 mos

FLAGS: **Medicaid**

MAJOR DIAG: Chronic Otitis

ALLERGIES: None Known

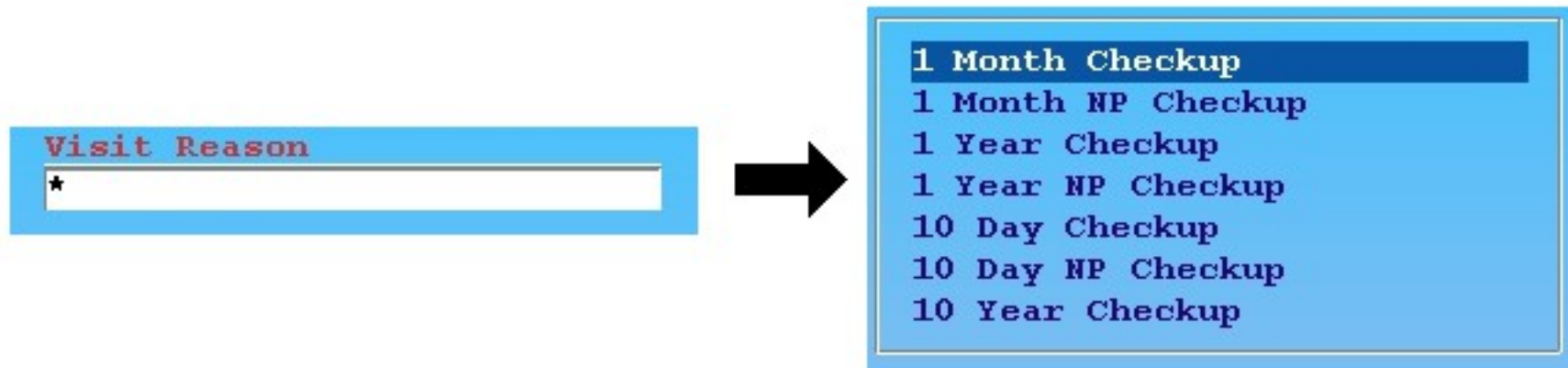
Add a List of "Missing Immunizations" to Your
Encounter Form



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Configuration and Setup Tips



Use Multiple Visit Reasons for Well Visits

Configuration and Setup Tips

The screenshot shows the 'SAM Search Criteria' screen with the following fields and data:

Name	Visit Reason	Provider	Mins	L
X Johnny Doe		C		0

Time Frame: [] [] [] []

PATIENT: Johnny Doe : PAT STATUS: Needs Extra Time LAST PHYS: 09/25/00
DOB: 02/02/2002 CUST STATUS: Budget NEXT APPT: 12/13/04
AGE: 2 yrs, 7 mos GUAR STATUS: Budget Physical

CUST: John Doe GUAR: John Doe
1 Main St. 1 Main St.
Suite 7 Suite 7
Winooski, VT 05404 Winooski, VT 05404
H: 802-555-9228 PERS BAL: \$ 135.00 H: 802-555-8177 PERS BAL: \$ 135.00
W: 802-555-7344 INS BAL: \$ 682.00 W: 800-555-7708 INS BAL: \$ 682.00

PRI: BCBS/BOX 9196 \$10 CERT: 008559499 GRP: PCC1151
SEC: CERT: GRP:

Suffix #: 01252684305 Medicaid #:
Alt Name: Rubble Chart #: 4585

MISS: 2 (07/13/04, Johnny, Sick Call) CANC: 0

Buttons: Schedule, Inquire, Find, Next Relation, Demo-graphics, Clear

Annotations:

- Enter visit criteria here (points to the Name field)
- View patient and family information here (points to the patient details section)
- Jump to other functions, add patients, etc. (points to the bottom buttons)

Customize the Scheduling Information Screen and
Function Keys in 'sam'



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Configuration and Setup Tips

TABLE NAME	ENTRY NAME	ABBREVIATION
1) Diagnoses	Abdominal Pain	ap
2) Diagnoses	Otitis Media Serous	oms
3) Procedures	Tubing Nebulizer - Supplies	ns
4) Reasons for a Visit	5 Year Well	5y
5) Providers	Blevins	B1
6) Payment Types	Visa Card	v

Create Abbreviations for Common Procedures,
Diagnoses, Providers, or Other Table Entries



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Partner Pointers For Newbies

<http://learn.pcc.com/didyouknow.htm>

|

Thank You!



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