

# Optimizing Partner aka What's New!

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PCC 2016 Users' Conference



# Optimizing Partner

## Overview

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



# Optimizing Partner

## 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 Entry 2 of 26

|                |  |       |                                   |
|----------------|--|-------|-----------------------------------|
| Provider Name: | <input type="text" value="Elizabeth Casey, M.D."/>             | Type: | <input type="text" value="Real"/> |
| Short Name:    | <input type="text" value="Dr. Casey"/>                         |       |                                   |
| Last Name:     | <input type="text" value="Casey"/>                             |       |                                   |
| Initials:      | <input type="text" value="C"/>                                 |       |                                   |
| Prov Group:    | <input type="text" value="Casey"/>                             |       |                                   |
| EHR User:      | <input type="text" value="Elizabeth Casey, M.D. (elizabeth)"/> |       |                                   |

# Optimizing Partner

## External Cause ICD-10 Codes (7.2)

- 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

# Optimizing Partner oops (7.3)

→ Changes under F4/F5 Insurance/Visit Status

- ◆ You can now access a visit by entering the claim ID or date of service

Old School

Personal: \$ 37.00 Correcting Fred Flintstone (# 1980).  
Insurance: \$ 128.00 There are 802 more items.  
Medicaid: \$ 0.00 **Type item numbers to edit:**

New options!

Enter  
Claim ID

Enter  
Date

Go Back

# 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:

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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
Use the PgUp and PgDn keys to scroll through this information.

[x] ACCOUNTS WITH BALANCES PENDING Aetna HDHP ( )
Flintstone, Fred (#1980)
Flintstone, Dino (#3335) (03/29/12) (34DFJH)
01/16/2016 0.00 Expanded Focus 99213 372.30 D $ 79.00
Visit Notes:
06/16/16 Here is my very important note tracking what I have done
insurance company about their lack of payment.
Billing History:
12/11/14 Aetna HDHP claim batched
01/17/15 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

Personal: \$ 37.00 Correcting Fred Flintstone (# 1980).  
Insurance: \$ 128.00 There are 802 more items.  
Medicaid: \$ 0.00 **Type item numbers to edit:**

New options!

Enter  
Claim ID

Enter  
Date

Go Back

# Optimizing Partner oops (7.4)

→ See visit totals

| ITEM | PATIENT  | PROCEDURE   | DIAG     | SVC BIL | AMOUNT | SUM DUE |
|------|----------|---|----------|---------|--------|---------|
|      | 01/16/16 |   |          |         |        |         |
| 1)   | PC Dino  | 99213 0V Expanded Focu  | 372.30   | D D     | 79.00  | 79.00   |
|      | 06/17/16 | Note: Here is my very important note tracking what I have dis |          |         |        |         |
| 2)   | 05/02/16 | Aetna HDHP HCFA #105  | \$ 79.00 |         |        |         |
| 3)   | 03/21/16 | Aetna HDHP HCFA #69   | \$ 79.00 |         |        |         |



# Optimizing Partner oops (6.29)

→ Viewing CPT codes on the first screen

| ITEM | PATIENT  | PROCEDURE   | DIAG   | SVC | BIL | AMOUNT | SUM   | DUE |
|------|----------|---|--------|-----|-----|--------|-------|-----|
|      | 01/16/16 |   |        |     |     |        |       |     |
| 1)   | PC Dino  | 99213 0V Expanded Focu  | 372.30 | D   | D   | 79.00  | 79.00 |     |
|      | 06/17/16 | Note: Here is my very important note tracking what I have dis |        |     |     |        |       |     |
| 2)   | 05/02/16 | Aetna HDHP HCFA #105  | \$     |     |     | 79.00  |       |     |
| 3)   | 03/21/16 | Aetna HDHP HCFA #69   | \$     |     |     | 79.00  |       |     |



# Optimizing Partner oops (6.29)

- Viewing CPT codes on the first screen
- ◆ ced allows you to turn this feature off

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[Charge / Payment Posting](#)

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OOPS CONFIGURATION

109. If no payments are selected, put none on the TOS claim form?

110. When relinking a payment, in what order should the charges appear?   
Ascending: Oldest charge first  
Descending: Most recent charge first

111. By default, should the billing history appear?

112. Should the Procedure Code appear with the Procedure Description?



# 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

Print Personal Bills - Work with Accounts      Generated: 06/24/2016 01:12pm

| Account Name   | Current   | 30..59   | 60..89  | 90..119 | 120+    | Total     |
|----------------|-----------|----------|---------|---------|---------|-----------|
| X Batz, Keith  | \$ 0.00   | \$ 96.00 | \$ 0.00 | \$ 4.00 | \$ 0.00 | \$ 100.00 |
| Behl, Dennis   | \$ 76.00  | \$ 0.00  | \$ 0.00 | \$ 0.00 | \$ 0.00 | \$ 76.00  |
| Boltz, Howard  | \$ 415.00 | \$ 0.00  | \$ 0.00 | \$ 0.00 | \$ 0.00 | \$ 405.00 |
| Caruso, Donald | \$ 0.00   | \$ 15.00 | \$ 0.00 | \$ 0.00 | \$ 0.00 | \$ 15.00  |
| Case, Tabatha  | \$ 45.40  | \$ 0.00  | \$ 0.00 | \$ 0.00 | \$ 0.00 | \$ 45.40  |
| Cooley, Mark   | \$ 10.00  | \$ 0.00  | \$ 0.00 | \$ 0.00 | \$ 0.00 | \$ 10.00  |

Back   Edit Account   Correct Mistakes   Post Payments   **Preview Bill**   **Hold Bill**   Form Letters   Sort By Total



# 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.

|                        |     |
|------------------------|-----|
| Billing Date           | Pay |
| 06/24/16               | \$  |
| Pmt Method: MasterCard |     |
| Card#:                 |     |
| Sig:                   |     |

  

Keith Batz  
41 Carousel Circle  
Brandon, VT 05733

Send  
PCC Pediatric Test  
20 Winooski Falls  
Suite 7  
Winooski, VT 0540  
(800) 722-1082

Please Detach And Return Top Portion With Your Paym

| Date of Service                 | Description of Services From | Charges  | Payments & Adjustments | Due Fr |
|---------------------------------|------------------------------|----------|------------------------|--------|
|                                 | 01/01/06 to 11/28/10         |          |                        | Insura |
| BALANCE FORWARD                 |                              |          |                        |        |
| Trevor Batz (Dr. Jones, Office) |                              |          |                        |        |
| 07/21/10                        | 0V 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)

→ 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)



# 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

| Copay   | Insurance Company     | Certificate # | Gr     |
|---------|-----------------------|---------------|--------|
| X 10.00 | Aetna PPO \$10        | 83482738472   | XXYYZZ |
| 10.00   | BCBS \$15 OV&WC-other | IUS044464686  | RUD863 |

Notes: Status:  Date Verified:

On-Demand eligibility report available by pressing F6.

Save Scroll Backward Scroll Forward Edit Policies Edit Patient Request Elig See Full Report Next Policy

Check all policies!