

# Edit Account and Patient Information



Pediatric EHR Solutions

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# 1. Introduction: Patients and Accounts Explained

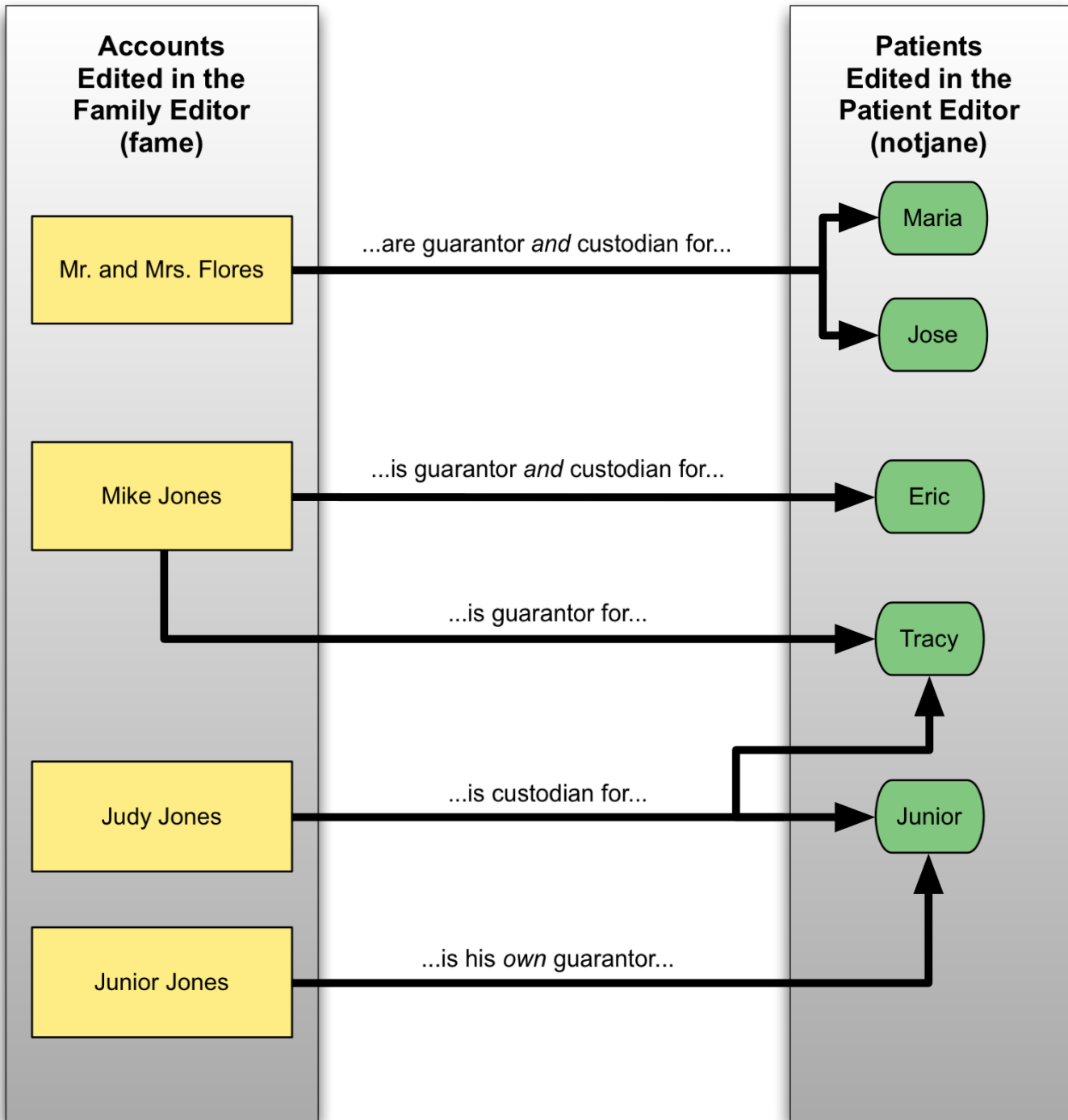
Partner's Family Editor (**fame**) and Patient Editor (**notjane**) programs can handle the many different kinds of families and billing situations your office encounters. The **policy** screen, available from the Patient Editor and in many other programs, stores the insurance policy record for each patient. The topics in this manual will explain the many features in each of these programs.

## Patients and Accounts Explained

Partner is a family billing system. It stores information about every patient, but it also stores a database of accounts, or "families." A family account may be the custodian of the patient, the bill-payer for the patient (the "guarantor"), or both. Three siblings may all have one family account serving as both guarantor and custodian. That family account will be listed in Partner under a parent's name. Alternatively, children from a divorced family may have one family account assigned as the guarantor and a *different* account assigned as the custodian.

It may be helpful to think of Partner as having two giant lists: a list of patients and a list of accounts. You run different programs and reports to look at each list. Patients are linked-up to one or more family accounts, and they can be moved around to different accounts when families change. You schedule an appointment for a *patient*, but you mail a bill to the guarantor *account* of that patient.

In the image below, a list of accounts is on the left-hand side and a list of patients is on the right-hand side. You can see how Partner accounts and Partner patients can be linked together to handle different kinds of families.



As shown above, some patients live with one account but have their bills sent to another family. Tracy Jones lives with her mother Judy, but Mike Jones pays Tracy's medical bills. Junior Jones also lives with Judy, but he is responsible for his own bills and is therefore his *own* guarantor. Partner can handle all of these situations with ease.

- **When do you run fame, the Family Editor?** If you need to review outstanding balances or the billing history for a family, or if you need to update demographic information, such as addresses or phone numbers, then you need to view an *account*. Run **fame**, the Family Editor.

- **When do you run notjane, the Patient Editor?** If you need an immunization record, want to review a patient's major diagnoses, or need to change a patient's age or preferred name, you are going to edit a *patient*. Run **notjane**, the Patient Editor.
- **What about Insurance Policy Information?** Although personal bills and billing history are tied to accounts, insurance policies are assigned on a per-patient basis. To access a patient's Insurance Policies screen, run **notjane** or **policy**.
- **When do you run checkin?** The **checkin** program, designed for checking in a patient at the front desk, is also a useful place to review information from both **fame** and **notjane**. The **checkin** program also includes the Insurance Policies screen.

Many Partner users run **checkin** first and then use function keys from the main **checkin** screen to run **fame** and **notjane**. You may find it easiest to run **checkin** for most tasks and never run **fame** or **notjane** as independent programs.

In the topics in this section, you will learn how to use **fame** and **notjane** to manage accounts and patients. To learn how to check in patients and use the **checkin** screen to edit accounts and patients, read *Patient Check-In (checkin)*.

## 2. Edit Account Information

The Family Editor, **fame**, manages account information. You can run the Family Editor to add a new family to Partner, update family demographics, or enter notes about the account. You can also review an aged balance summary, run a collection report, generate account form letters, or review an account's transaction history.

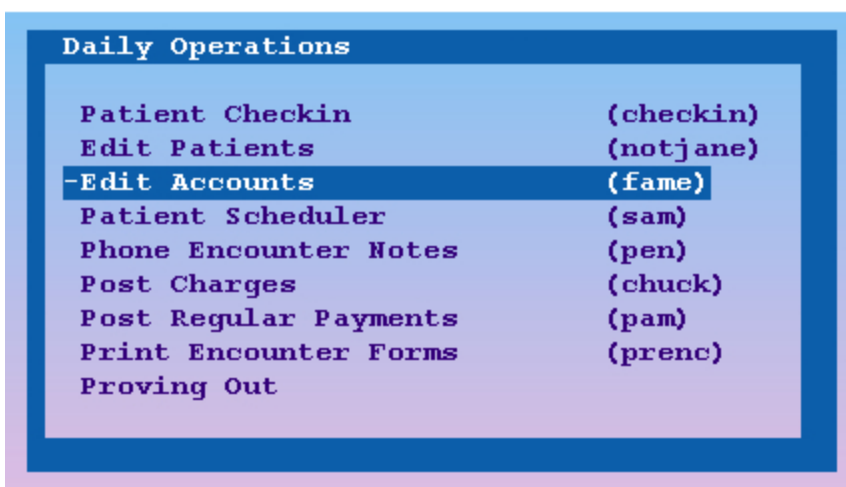
**Accounts and Patients:** All charges in Partner belong to accounts; all billing history is found by reviewing accounts. Use the Family Editor to work with accounts. Medical records, procedures, and diagnoses belong to patients. Use the Patient Editor (**notjane**) to work with patients.

### 2.1. Quickstart: Run the Family Editor and Make a Change

Follow the procedure below to learn the basics of **fame**.

#### Step 1: Run fame

You can run **fame** from the Partner Windows or by typing **fame** at a command prompt.



**Note:** You can also run **fame** from within other programs, such as **checkin**. Run **checkin** for the patient, then press [F3 -- *Edit Account*]. You can then skip to step #3.



#### Step 2: Find an Account

Enter the family's name, or part of the family's name, to search for the account.

Please enter an account:

First Name: Fred

Last Name: Flin

You can also search by account number, phone number, or several other criteria. To learn more, read *Finding Patients and Accounts*.

### Step 3: Make Your Changes

On the first page in **fame**, you can change the account's basic demographics. Move around the screen by pressing **Tab**, **Enter**, or the arrow keys. You can also move back one field by pressing the **Backspace** key. If you wish, you can press **Page Down** to cycle through all the pages of **fame**.

Page Up	F12	Page Down
Acct PCC: 180		Page 1 of 4
<b>The Family Editor</b>		
First: Fred	Home Phone: 800-722-1082	
Last: Flinstone	Father Wk#: 800-722-1370	
	Mother Wk#: 802-777-5555	
Addr: 1 Main Street	Cell/Beeper#: 802-555-1212	
Addr:	Email: yabadabado@yahoo.com	
City: Winooski		
State: VT	Zip Code: 05404	
Status: Budget		
EMG Contact: Wilma Flinstone	Last Service: Apr 26, 2005	
EMG Phone#: 802-846-2181	Last Bill Sent:	
Alt Last Nam: Rubble	Last Pers Pmt: Mar 29, 2005	
Mother SSN: 008-44-0944	Last Ins Pmt: Mar 25, 2005	
Father SSN: 002-22-3382	Hold Bill Till:	
Pharmacy #: 802-888-8878	Budget Amt: \$ 25.00	
	0 - 29	30 - 59
	60 - 89	90 - 119
	120+	Totals
Personal:	\$ 0.00	\$ 0.00
Insurance:	\$ 0.00	\$ 0.00
Medicaid:	\$ 0.00	\$ 0.00
	\$ 0.00	\$ 0.00
	\$ 0.00	\$ 0.00
	\$ 145.00	\$ 145.00
	\$ 647.00	\$ 647.00
	\$ 0.00	\$ 0.00

Once you have moved the cursor to a field you wish to change, press the **End** key to automatically erase the current contents.

### Step 4: Press [F1 -- Save]

Press **F1** to save your changes and quit. If you do *not* want to save your changes, press **F12** instead.

In the procedure above, you ran **fame** and made a small change to an account's demographics. In the next sections, you will learn about each of the screens in the **fame** program. Each of them serves an important purpose.

## 2.2. Edit Account Demographics in fame

On the first page of **fame**, the main demographics screen, you can view and change demographic and other miscellaneous information about an account. You can also run two very useful account reports.

Page Up F12 Page Down

Acct PCC: 180 The Family Editor Page 1 of 4

**Basic Demographics**

First: Fred Home Phone: 800-722-1082  
 Last: Flinstone Father Wk#: 800-722-1370  
 Mother Wk#: 802-777-5555  
 Cell/Beeper#: 802-555-1212

Addr: 1 Main Street  
 City: Winooski Email: yabadabado@yahoo.com  
 State: VT Zip Code: 05404

**Account Status Flags**

Status: Budget

**Customizable Information Fields**

EMG Contact: Wilma Flinstone Last Service: Apr 26, 2005  
 EMG Phone#: 802-846-2181 Last Bill Sent:  
 Alt Last Nam: Rubble Last Pers Pmt: Mar 29, 2005  
 Mother SSN: 008-44-0944 Last Ins Pmt: Mar 25, 2005  
 Father SSN: 002-22-3382 Hold Bill Till:  
 Pharmacy #: 802-888-8878 Budget Amt: \$ 25.00

**Aged Balance Summary**

	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

**Detailed Outstanding Balance Report**

The fields at the top of the screen are self-explanatory. Press **Enter** or **Tab** to move from field to field and fill in any of the basic information. Partner will automatically capitalize names for you and enter dashes (-) in the phone numbers if you do not.

**Status Flags:** The "Status" field is not like other fields. Statuses are used to "flag" or classify accounts. You can put several different status flags on an account, separated by commas. An account might have "Overdue," "Bad Debt," and "Collection" status flags. Your office can run reports to see all the families that have a status. The status flags show up in the scheduler and elsewhere in Partner so your office will always know if there are any special circumstances surrounding an account.

Status: Bad Debt, Budget, \*

**Look-Up Fields:** In all Partner programs, some fields have a list of possible answers from which you can pick. You can type anything you want into a name field or address field, but the "Status" field can only be filled from a list of predefined values, just like medical procedures elsewhere in Partner. To see a list of possible answers in a "Look-Up" field, type an asterisk (\*) and press **Enter**. You can learn more about using the asterisk key to search for options in the *Charge Posting* manual.



Status: \*



Bad Debt  
Budget  
Call Billing Office  
Cash Only  
Collection



Status: Cash Only

**Zip Code City Look-Up:** If you type a zip code into the "City" field, Partner will look up the city name for you. Press **Enter** until the cursor is in the "City" field, type in the five digit zip code, and press **Enter** or **Tab** to perform the look-up.

Addr: 1 Main Street  
Addr:  
City: 05404  
State: Zip Code:



Addr: 1 Main Street  
Addr:  
City: Winooski  
State: VT Zip Code: 05404

**Customizable Fields:** The six fields in the lower left quarter of the screen are customizable. Your office may have set these fields to record HIPAA information, social security numbers, or other data.

EMG Contact: Wilma Flinstone  
EMG Phone#: 802-846-2181  
Alt Last Nam: Rubble  
Mother SSN: 008-44-0944  
Father SSN: 002-22-3382  
Pharmacy #: 802-888-8878

**Billing and Budget Information:** In the lower-right quarter of the page, you can view the account's "Last

Service" date, the last date on which charges were posted for a patient on the account. Payment and billing dates are also listed. Partner tracks and maintains these dates automatically. The last two fields on the screen, "Hold Bill Till" and "Budget Amt," can be used to control when the family will receive a personal bill and what amount will be due. You can learn more about family billing options by reading *Personal Billing and Collections*.

Last Service:	Apr 26, 2005
Last Bill Sent:	
Last Pers Pmt:	Mar 29, 2005
Last Ins Pmt:	Mar 25, 2005
Hold Bill Till:	
Budget Amt:	\$ 25.00

**Aged Balances:** Does the account or their insurance company have any outstanding bills? You can review outstanding balances in an aged chart at the bottom of the screen. The Personal, Insurance, and Medicaid totals will give you a quick reference, but you can also see how old the balances are by number of days since the transaction date (the date of service). Since a charge may become personal only *after* the insurance company rejects it, a 120+ personal charge may not be as terrible as it looks. However, a large amount of money overdue in the "120+" column might be a red-flag that the account needs attention by a biller. If you want more information about an account's outstanding charges, press [F3 -- *Collectn Report*].

	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

**Address Verification:** Insurance carriers will reject claims that have a bad zip code or are missing street or city information. When you edit an account, Partner checks the address and warns you if there is a problem.

**Address Verification**

Fred Flinstone (#149)

Addr: 479 Cocoa Avenue

Addr:

City:

State: NV Zip Code: 05056

1) Missing city  
2) State doesn't match with zipcode

[F1] Save changes and continue. [F12] continue without saving.

Make corrections to the fields that are highlighted in red and press [F1 -- *Save and Continue*]. If you do not have correct address information, you can press F12 to continue.

**E-Mail Addresses:** The Email field in the Family Editor (**fame**) is designed to hold one e-mail address with no additional characters. If additional characters are entered or multiple e-mail addresses are typed into the field, Partner will attempt to parse the first available e-mail address.

## Function Keys on the Demographics Page

[F1 -- Save]

Press **F1** to save all changes and quit **fame**.

[F3 -- Collectn Report]

Press **F3** to run the collection report program. Do you need to understand, in detail, why an account has an overdue balance? The collection report provides a complete record of outstanding charges, including an explanation of which charges are pending the insurance company and which are personal. To learn more about the collection report (**coll**), read *The Collection Report*.

[F5 -- Notes]

Press **F5** to jump down to page three of **fame**, the main notes page. You can accomplish the same thing by pressing **Page Down** twice.

[F6 -- Account Forms]

Press **F6** to generate a form letter for this account. You will see a list of available form letters:



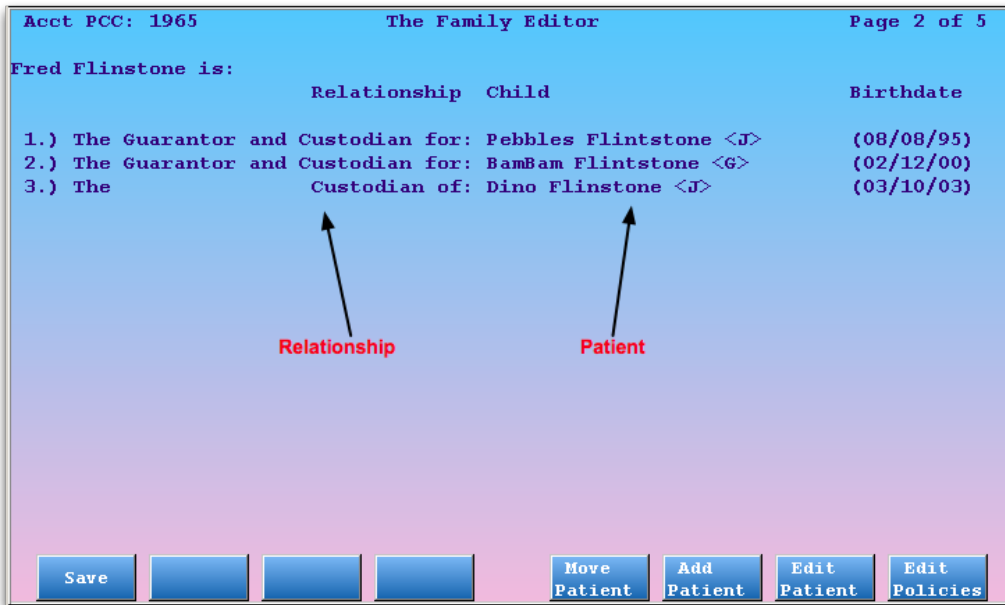
Use the arrow keys to select the desired letter, mark the letter or letters you want with an **X**, and press [F1 -- Process Forms]. Some forms will ask you questions on the screen before you print them. Do you want to learn how to create your own form letters or edit the existing ones? Read *Customizing Form Letters*.

[F8 -- Account History]

Press **F8** to run the Account History report, **tater**. The Account History report provides you with a complete transaction history for the account, including all dependent patients who have the account as a guarantor and a complete billing history for all insurance companies on the account.

## 2.3. Edit Family Dependents

The second page of **fame** is the dependents screen. It displays all patients related to the account, and contains tools for adding and editing patient information.



The list of family members includes any patients who have this account as either a guarantor, a custodian, or both. The relationship to the patient is described on the left, and the patient's name and birth date appear on the right. The initial next to the patient's name indicates their primary care physician, if one is assigned.

### Function Keys

[F1 -- Save]

Press [F1] to save any changes and quit the Family Editor.

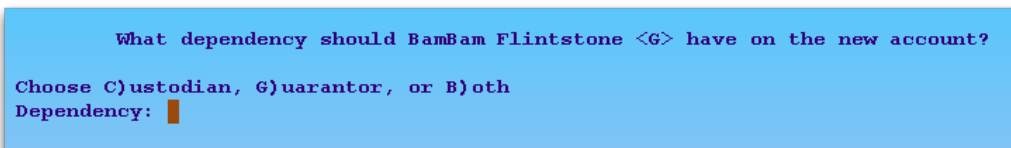
[F5 -- Move Patient]

Press [F5] and select a patient to reassign them to another account.



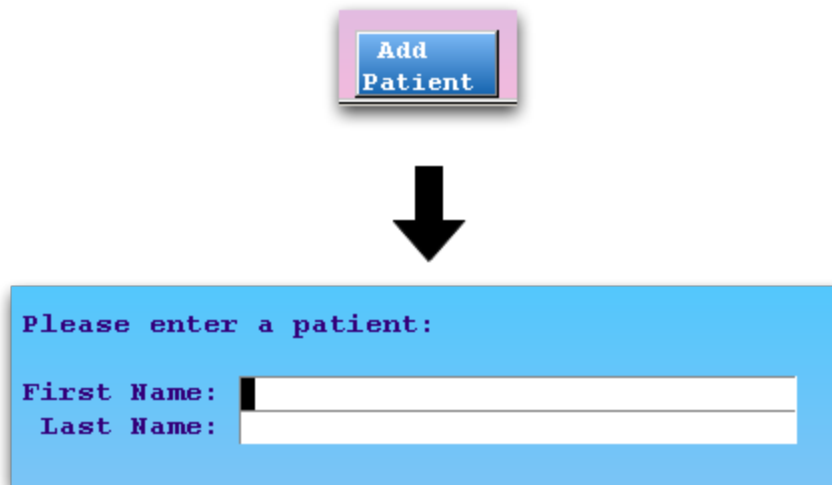
Please enter the number of your choice: 2

You will be prompted to find an account and then asked if that account should be the guarantor, custodian, or both for the selected patient.



**[F6 -- Add Patient]**

Press **F6** to add a patient to the account.



If the patient is not already entered into your system, you can add them during the procedure. After finding or adding the new patient, you will be asked if the current account should be the guarantor, custodian, or both for the patient.

**[F7 -- Edit Patient]**

Press **F7** and select a patient to run the Patient Editor (**notjane**) for that patient.

**[F8 -- Edit Policies]**

Press **F8** and select a patient to view the Insurance Policies screen for that patient.

## **2.4. Edit Account Notes**

Pages three, four, and five of the Family Editor are notes screens. There are three different types of notes, and each has a screen to itself. They are: regular account notes, the account billing note, and the account copay note.

### **2.4.1 Account Notes**

The Account Note screen stores user-entered notes about the family. Every note is saved with the username of the person who entered it along with a creation date and time.

Acct PCC: 1965                      The Family Editor                      Page 3 of 5  
 Account Note: Fred Flinstone  
 Search Pattern:                      Search on whole words: No

x 11/01/06 Called Fred about outstanding bill, he assures me the rock quarry will pay soon.                      - 02:46 pm justin

10/19/06 Has anyone else noticed that one of their children (Dino) is actually a dinosaur? Also-- recommended Fred visit ER. Apparently injured left big toe while starting the car.                      - 02:44 pm lynne

10/08/06 I have delivered payment coupons and a 90-day overdue notice to this account. They have agree to pay \$100 a month starting with this month. Both Fred and Wilma understand the situation.                      - 02:43 pm phil

07/04/06 Insurance rejected due to a faulty ID#, but the ID# has been reconfirmed as correct. BCBS says it was their fault and that they are very sorry. They promise to never do it again.                      - 02:42 pm pcc

04/22/06 Spoke with Wilma about unpaid copays. There was some confusion from when they added their new BCBS plan in January.                      - 02:41 pm sploof

Save    Scroll Forward    Post New Note    Post Followup    Modify Note    Change Settings    Search Pattern

View Older Notes

Press [F4 -- Post New Note] to add a note to the account record.



Mr. Flinstone has agreed to pay of their outstanding personal balance at \$25 a month, starting with Oct. █

File Name: /tmp/tmpnotes.446048                      Mode: insert

Save    Unix    Help    Print    Restart    Format    Delete    Edit New  
 Quit    Shell          File    Para.    Line    File

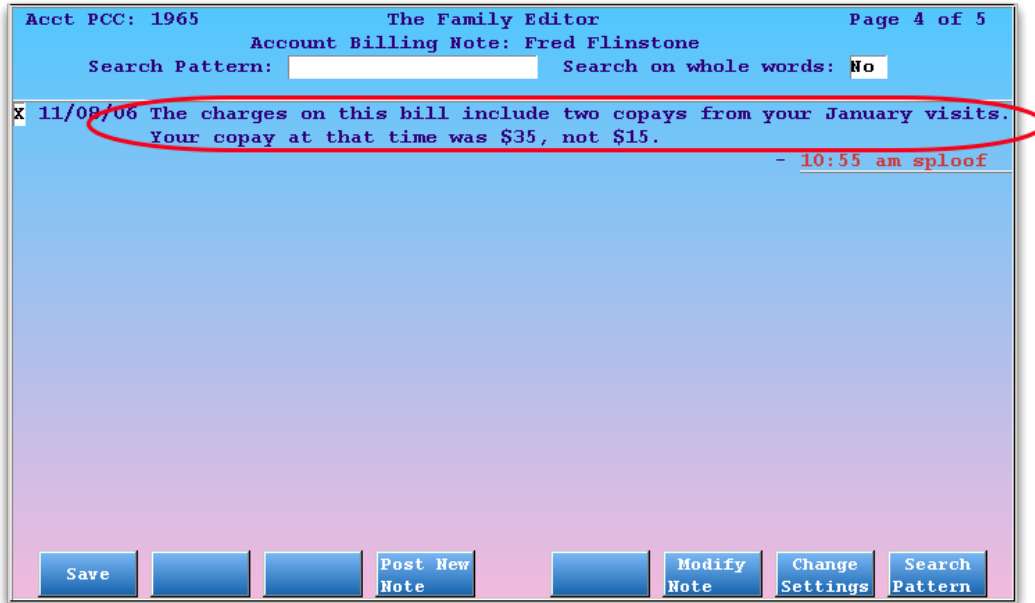
Type your new note and press [F1 -- Save], or press F12 to cancel.

**Learn More About Notes:** The main notes screen is the same in both the Family and Patient Editors. It

includes a follow-up note feature, a search field, and many other features to help you track important information about the patient or family. To learn about these features, read the Structured Notes manual.

## 2.4.2 Account Billing Note

The account billing note will appear on personal bills sent home to this family. If you have a special message for the family that must appear on their personal bill, add it to this page.



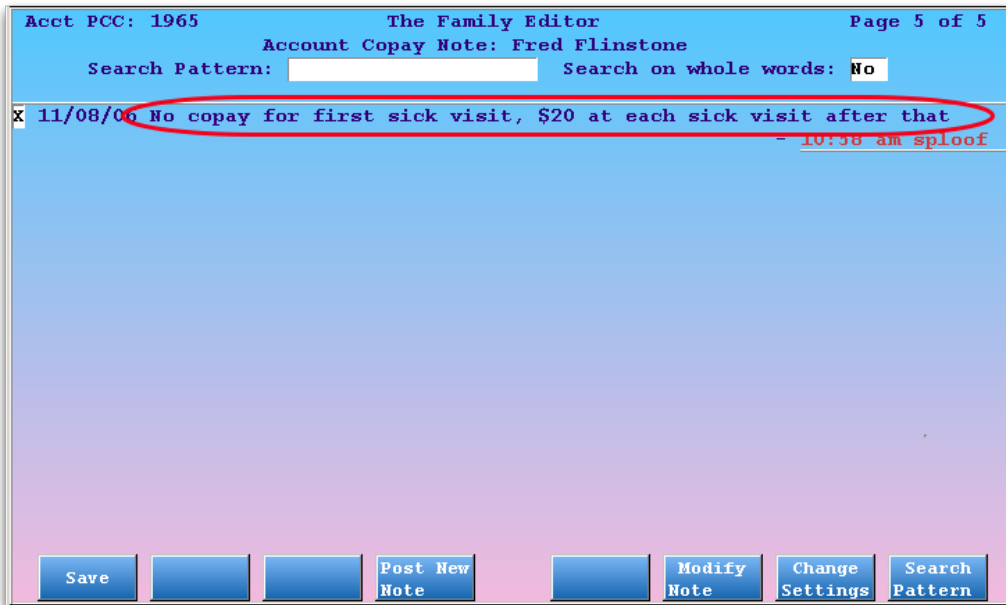
Press [F6 -- *Modify Note*] to change the family billing message. Type the new message and press [F1 -- *Save*].

If this is the first time you have added a note to this family's bills, you will need to press [F4 -- *Post New Note*] instead of F6.

**Messages For All Families:** You can also add a message to *all* personal bills, for all families, or a specific message for current or overdue bills. Read *Personal Billing and Collections* to learn more.

## 2.4.3 Account Copay Note

The copay note will appear in the Charge Posting (**checkout**) program when a patient on this account is checked out. If you need the front desk to review important information before posting a charge for this account, enter the note here.



Press [**F6** -- *Modify Note*] to change the account copay note. Type the new message and press [**F1** -- *Save*].

If this is the first time you have added a copay note for this family's patients, you will need to press [**F4** -- *Post New Note*] instead of **F6**.



# 3. Edit Patient Information

The Patient Editor (**notjane**) manages patient information. You can run **notjane** to add a new patient to Partner, view an immunization record, research visit history, or read about a patient's major diagnoses and allergies.

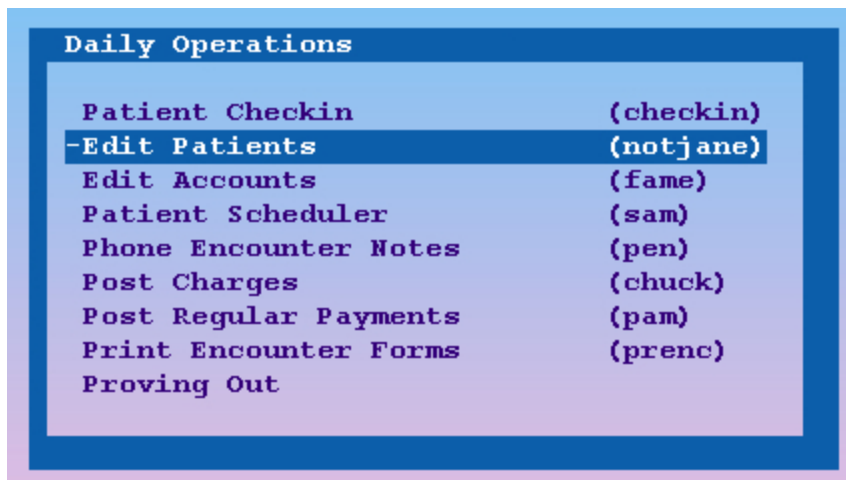
**Patients and Accounts:** Medical records, procedures, and diagnoses belong to patients. Use the Patient Editor to work with patients. Charges and billing history, on the other hand, belong to accounts. Use the Family Editor (**fame**) to work with accounts.

## 3.1. Run the Patient Editor and Make a Change

Follow the procedure below to learn the basics of **notjane**.

### Step 1: Run notjane

You can access **notjane** from the Partner windows or by typing **notjane** at a command prompt:



You can also run **notjane** from the main patient demographic screen in **checkin**. Run **checkin** for the patient, then press [F2 - Edit Patient]. You can then skip to step 3.



### Step 2: Find a Patient

Enter the patient's name, or part of the patient's name.



You can also search by chart number, phone number, or several other criteria. To learn more, read Finding Patients and Accounts.

### Step 3: Make Your Changes

On the first page in the Patient Editor (**notjane**), you can change the patient's basic demographics. Move around the screen by pressing **Tab**, **Enter**, or the arrow keys. You can also move back one field by pressing the **Backspace** key. If you wish, you can press **Page Down** to cycle through all the pages of **notjane**.

The screenshot displays the 'Patient Editor' window for patient PCC 3336. The interface is divided into several sections for data entry. The top section contains name fields (First, Nickname, Middle, Last, Suffix) and birth information (Born, Age, Sex, Deceased, Deceased Date). The middle section includes Physician (Mark Williams, M.D.), Status (\$\$ Problem, Adoption), and other identifiers (Other ID, School, Note, Old PM ID). The bottom section is split into 'Patient Lives With' and 'Send Bill To' details, including addresses, cities, and zip codes. Contact information (Home, Work, Cell, Emg Phone) and medical history (Relation to Bill Payer, Date of Last Visit, Date of Last Physical, Date Due for Next Physical) are also present. A bottom toolbar contains buttons for Save, Edit Policies, Imms Record, Reassign Account, Patient History, Patient Forms, and Edit Account.

Pat PCC: 3336	Patient Editor	Page 1 of 4
First Name: Margaret	Born: Jul 17, 2004	
Nickname: Pebbles	Age: 10 yrs, 1 mo	
Middle Name:	Sex: Female	
Last Name: Flintstone	Deceased: No	
Suffix:	Deceased Date:	
Physician: Mark Williams, M.D.		
Status: \$\$ Problem, Adoption		
Other ID: 828-74-6104	Note: Rubble	
School: Bedrock Central	Old PM ID : 2755	
Patient Lives With:	Send Bill To:	
Wilma Flintstone (#1981)	Fred Flintstone (#1980)	
Addr: 15 Quarry Lane	1400 Rock Road	
Addr:		
City: Winooski	Winooski	
State VT Zip Code: 05404	VT Zip Code: 05404	
Home Phone: 802-555-0194	Relation to Bill Payer: Child	
Work Phone: 802-555-0197	Date of Last Visit: Oct 15, 2014	
Cell Phone: 802-555-0161	Date of Last Physical: Jul 25, 2013	
Emg Phone: 802-555-0168	Date Due for Next Physical: Jul 31, 2014	

### Step 4: Press [F1 -- Save]

Press **F1** to save your changes and quit. If you do *not* want to save your changes, press **F12** instead.

In the procedure above, you ran **notjane** and made a small change to a patient's basic information. In the next sections, you will learn about each of the pages in the **notjane** program.

## 3.2. Patient Demographics, Screen 1

On the first page of **notjane**, the demographics screen, you can view and change basic information about the patient. You can also change the custodian and/or guarantor account for the patient and run two very useful patient reports (**imms** and **patinfo**).

Pat PCC: 3336 Patient Editor Page 1 of 4

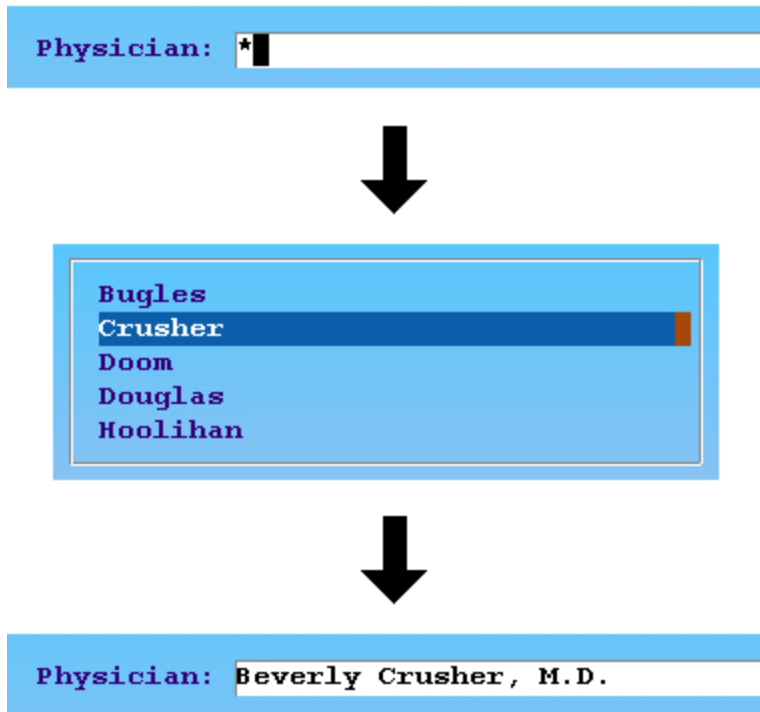
First Name:	Margaret	Born:	Jul 17, 2004
Nickname:	Pebbles	Age:	10 yrs, 1 mo
Middle Name:		Sex:	Female
Last Name:	Flintstone	Deceased:	No
Suffix:		Deceased Date:	
Physician:	Mark Williams, M.D.		
Status:	\$\$ Problem, Adoption		
Other ID:	828-74-6104	Note:	Rubble
School:	Bedrock Central	Old PM ID :	2755
Patient Lives With:		Send Bill To:	
Wilma Flintstone (#1981)		Fred Flintstone (#1980)	
Addr:	15 Quarry Lane	1400 Rock Road	
Addr:			
City:	Winooski	Winooski	
State	VT	Zip Code:	05404
Home Phone:	802-555-0194	Relation to Bill Payer:	Child
Work Phone:	802-555-0197	Date of Last Visit:	Oct 15, 2014
Cell Phone:	802-555-0161	Date of Last Physical:	Jul 25, 2013
Emg Phone:	802-555-0168	Date Due for Next Physical:	Jul 31, 2014

Patient Status Flags →  
 Customizable Information Fields →  
 Family Account or Accounts →  
 Insurance Policies →  
 Immunization Record →

Press **Enter** or **Tab** to move from field to field and fill out any of the basic information. Partner will automatically capitalize names for you and enter dashes (-) in the phone numbers if you do not. You can write the birth date in a condensed format, such as "082401" for August 24th, 2001, and Partner will expand the date for you and calculate the patient's age automatically.

**Look-Up Fields.** In all Partner programs, some fields have a list of possible answers from which you can pick. You can type anything you want into a name field or address field, but the "Physician" field can only be filled with a provider from your practice. To see a list of possible answers in a "Look-Up" field, type an asterisk (\*) and press **Enter**.

The primary care "Physician" field and the "Status" field are both look-up fields:



**Status Flags.** The "Status" field is not like other fields. Statuses are used to "flag" or classify patients. You can put several different status flags on a patient, separated by commas. A patient might have "Needs Extra Time" and "Diabetic" status flags. Your office can run reports to see all the patients that have a particular status. The status flags show up in the scheduler and elsewhere in Partner so your office will always know if there are any special circumstances surrounding a patient.

Status: Needs Extra Time, Medicaid, \*

**Four "Extra Information" Fields.** There are four fields in the middle of the screen which are customizable. Your practice might use these fields to store additional contact information, nicknames, or important dates.

Medicaid #:	888-88-8888	Pat Ins #2:	012345
Pat Ins #1:	0123456	Chart #:	4585

**Guarantor and Custodian.** In the middle of the screen, you will see either one or two account. If the same account is both the guarantor and custodian for this patient, one account will appear in the center of the screen:

Patient Lives with, and Bills Sent to:  
Fred Flinstone (#1965)

Addr: 12 Granite Lane  
Addr:  
City: Bedrock  
State: NV Zip Code: 48801

If one account is the guarantor and a *different* account is the custodian, two accounts will appear:

<b>Patient Lives With:</b>		<b>Send Bill To:</b>	
Wilma Flintstone (#1510)		Fred Flinstone (#1965)	
Addr:	21 Granite Drive	12 Granite Lane	
Addr:			
City:	Bedrock	Bedrock	
State:	NV	Zip Code:	48801

When two accounts are shown, the account on the left is the custodian account and the account on the right is the guarantor account.

**What is a guarantor, what is a custodian?** The custodian is the patient's care-giver and physical address. The guarantor is the bill payer. During the time an individual is a patient at your practice, the guarantor and custodian may change or even switch places! Press [F4 -- *Reassign Account*] to make changes.

### 3.2.1 Deceased Patients in the Patient Account

You can review and set a patient's deceased status in the Patient Editor (**notjane**).

Pat PCC: 3430 Patient Editor Page 1 of 4

First Name:	Jonah	Born:	Apr 4, 2004
Nickname:		Age:	Deceased
Middle Name:		Sex:	Male
Last Name:	Smith	Deceased:	Yes
Suffix:		Deceased Date:	Feb 2, 2012
Physician:			
Status:	Deceased		

Wherever the patient's age appears in Partner, it will be replaced with the Deceased indicator.

**Deceased Flag:** As shown above, the Deceased status automatically adds a Deceased status flag to the patient's record in Partner. You can use that status flag to include or exclude the patient from reports or the Patient Recaller. If you add or remove the status flag, it will also change the patient's deceased status.

As with queues in PCC EHR, Partner's patient lists will display the deceased status in place of the patient's calculated age.

Checkin Patient

I could not find J Smith exactly.  
I did find several people with Smith for a last name.

View: Patient

	First	Last	Born	Sex	Age	Last Seen
1.	Jackson T.	Smith	11/28/96	M	17 yrs, 6 mos	04/02/14
2.	Jason	Smith	08/09/10	M	3 yrs, 10 mos	11/09/13
3.	Jayson	Smith	07/05/99	M	14 yrs, 11 mos	01/16/14
4.	Jennifer	Smith	12/01/02	F	11 yrs, 6 mos	
5.	Jonah	Smith	04/04/04	M	Deceased	
6.	Jason R.	Smith, III.	12/30/08	M	5 yrs, 5 mos	01/07/09
7.	Joshua "Danny" G	Smith, M.D.	01/09/96	M	18 yrs, 5 mos	

Please enter your choice: **1**

### 3.2.2 Function Keys on the Demographics Page

[F1 -- Save]

Press **F1** to save all changes and quit **notjane**.

[F2 -- Edit Policies]

Press **F2** to view the patient's Insurance Policies screen.

[F3 -- Imms Record]

Press **F3** to run the **imms** program. In **imms**, you can view the patient's immunization record. Press [F2 -- School Form] to print a nicely formatted immunization record, press **F12** to return to **notjane**.

Page Up	F12					Page Down
<b>IMMUNIZATION RECORD</b>						Page 1 of 4
First Name:	Pebbles				Born:	Dec 2, 2001
Last Name:	Flinstone				Age:	3 yrs, 10 mos
Physician:	Mike Blevins, M.D.				Sex:	Female
DTaP:						
DPT:	07/26/01	10/04/01	11/21/01	01/11/02	03/19/02	
	05/21/02	12/05/02	05/20/03			
DT Pedi:						
Td Adult:						
DPT/HIB:						
DTaP/HIB:						
IPV:						
OPV:	07/26/01	10/04/01	11/21/01	01/11/02	03/19/02	
Save _ Quit	School Form			Update Details		Add New Immuniz

You can enter injection dates manually, by using the **F8** key, or by posting immunization charges during checkout.

[F4 -- Reassign Account]

Press **F4** to change the guarantor or custodian accounts for this patient. You will first be asked which account to reassign:

<b>Patient Lives with, and Bills Sent to:</b>	
Fred Flinstone (#1965)	
Addr:	12 Granite Lane
Addr:	
City:	Bedrock
State:	NV
Zip Code:	48801

Next, find the family account:

**Custodial Account Selection**

Please enter an account:

First Name:

Last Name:

**[F5 -- Patient History]**

Press **F5** to run the Patient History (**patinfo**) program. This program produces two different reports which summarize a patient's visits by date or by diagnosis. For example, a Patient History report could show you every date upon which asthma was used as a diagnosis for the patient.

**[F6 -- Patient Forms]**

Press **F6** to generate a form letter for this patient. You will see a list of available form letters:

Page 1 of 1

FORM GENERATOR Pebbles Flinstone

---

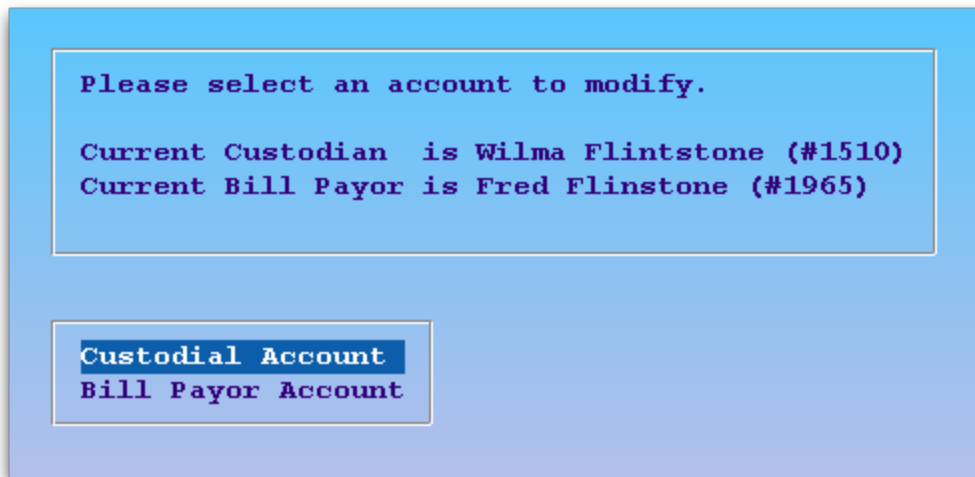
- Demographics Update Form
- Medical Records
- Referral/Newborn Letter
- School Nurse Meds Admin
- School/PE Excuse
- Sports Form
- Termination - Missed Appt
- Transfer Form

---

Use the arrow keys to select the desired letter, mark the letter or letters you want with an **X**, and press **[F1 -- Process Forms]**. Some forms will ask you questions on the screen before they print. Do you want to learn how to create your own form letters or edit the existing ones? Read *Customizing Form Letters* for more information.

**[F7 -- Edit Account]**

Press **F7** to run the Family Editor (**fame**) for the account(s) connected to this patient. If there are two different accounts related to the patient, you will be prompted to choose whether to edit the Custodian or the Guarantor:



### 3.3. Major Diagnoses and Allergies

The third page of **notjane** contains major diagnoses and allergies for the patient and a summary of appointment information.

Pat PCC: 3336 Patient Editor Page 3 of 4

First Name:  Born:   
 Last Name:  Age:   
 Physician:  Sex:

Major Diagnoses:	Last Seen:	Allergies:
Attention Deficit Disorder	Apr 4, 2010	Allergy Cat Hair
Asthma Sev Persist	Feb 5, 2008	
Eczema	Feb 5, 2006	

Current Appointments:

01/21/13 Well Visit Dr. Gomez	Total Appts: 23	Most Recent Occurrence:
	Missed: 1	09/08/11 Sick Call
	Cancelled: 1	11/01/05 Sick Call

**Major Diagnoses and Allergies:** You can enter major diagnoses and allergies manually, but Partner will also add entries based on the diagnoses that are posted for the patient during checkout. Only diagnoses that are marked as "Major" or "Allergy" in the Partner diagnosis table will appear on these lists.

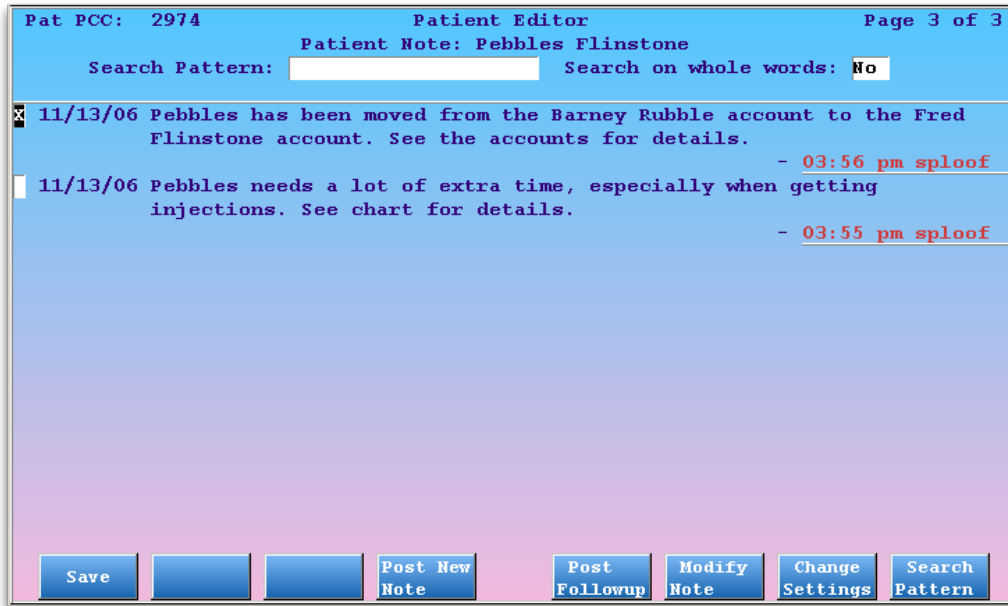
**Appointment Information.** Partner will list the next three scheduled appointments for the patient. You can also see the total number of appointments, the total number of appointments missed and canceled, and an explanation of what visits were most recently missed and canceled. All of this information is maintained automatically by Partner and can not be edited.

**More Diagnoses and Procedure Information.** For a detailed history of the procedures and diagnoses of this patient, press [F5 -- *Patient History*] to run the **patinfo** program.

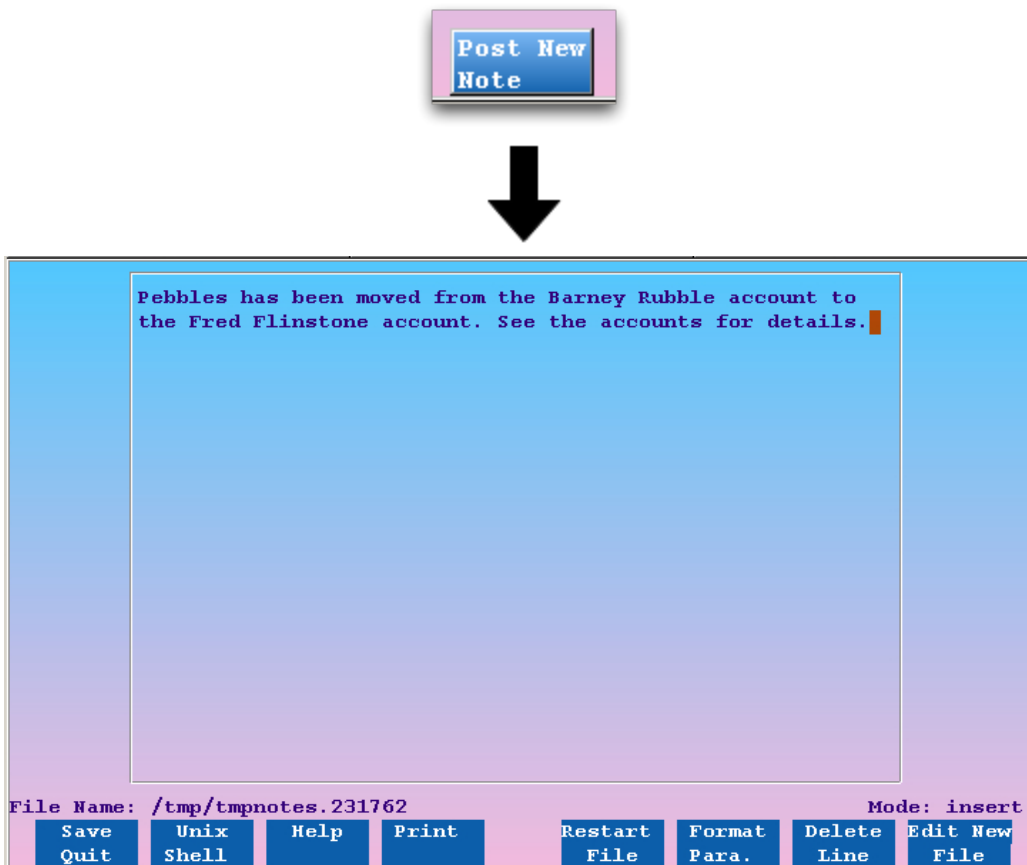


### 3.4. Edit Patient Notes

The third page of **notjane** is the Patient Notes screen. You can store important information and records of interactions with the patient.



Press [F4 -- *Post New Note*] to begin adding a new note. You will see a text editor window for adding your note:



While typing your note, you can use the various function keys in the text editor to make changes. After typing your note, press [F1 -- *Save & Quit*]. Press F12 to cancel.

**Learn More About Notes:** The notes screen is the same in both the Family and Patient Editors. It includes a follow-up note feature, a search field, and many other features to help you track important information about the patient or family. To learn about these features, read *Structured Notes*.

## 4. Add New Patients and Accounts

Before patients can be scheduled or procedures can be posted, you need to add the patients and their family account(s) to Partner. This section will guide you through a basic procedure for adding a new patient and a family account: try to find the patient, add the patient, and then add the family (if they are new to your practice).

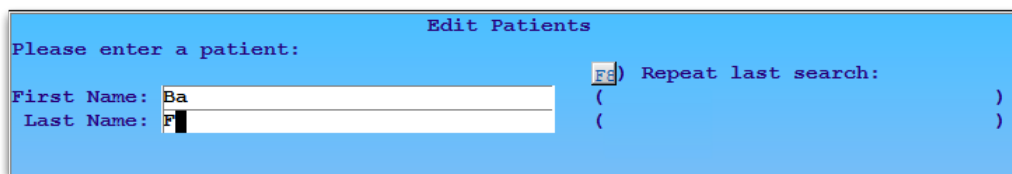
**When do you add patients?** You might need to add a patient when you try to schedule them and find they are not in your system. Or perhaps you are posting hospital charges for a newborn and know that "Babyboy Smith" has not yet been added to Partner. Whatever job you are performing, you will start by trying to find a patient.

Read below to learn the details of each step.

### Step 1: Attempt to Find the Patient

Before you can add a patient, you must make certain that the patient is not already in the Partner system. You may already be searching for the patient while scheduling in **sam** or some other program.

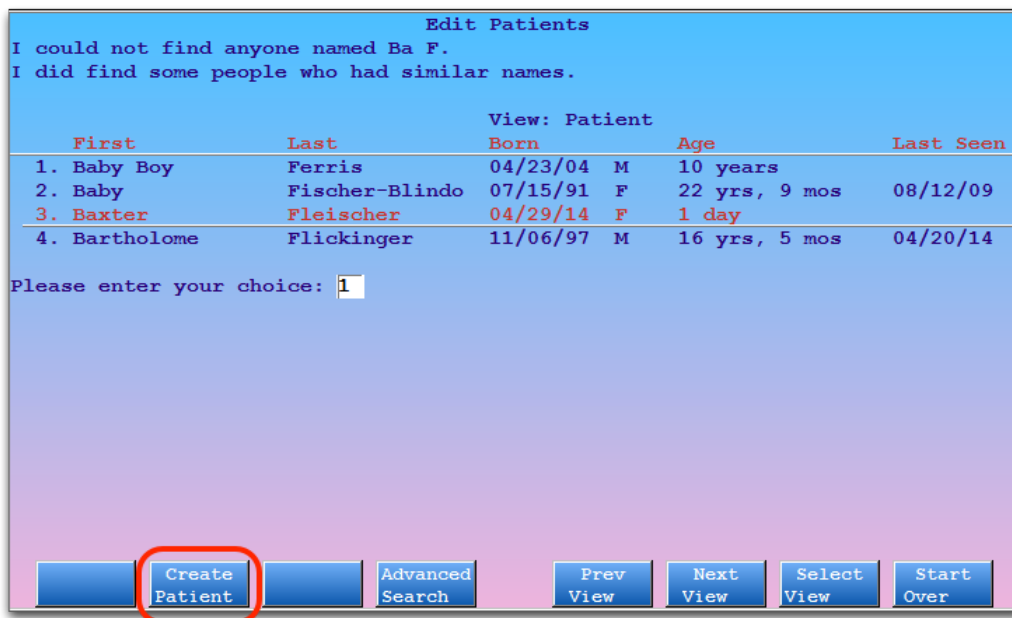
If not, run the Patient Editor (**notjane**) and enter the first few letters of the patient's name. If the patient has already visited your office, they should be in the system.



The screenshot shows a window titled "Edit Patients" with a blue background. It contains the text "Please enter a patient:" followed by two input fields. The first field is labeled "First Name:" and contains the text "Ba". The second field is labeled "Last Name:" and contains the text "F". To the right of these fields is a "Repeat last search:" option with a checkbox and a button labeled "F2".

### Step 2: Press [F2 - Create Patient]

If the patient does not appear, and you are satisfied that you searched by the patient's real name, press [F2 - Create Patient].



The screenshot shows the "Edit Patients" window with a blue background. It displays the message "I could not find anyone named Ba F. I did find some people who had similar names." Below this is a table with columns: "First", "Last", "Born", "Age", and "Last Seen". The table lists four patients:

First	Last	Born	Age	Last Seen
1. Baby Boy	Ferris	04/23/04 M	10 years	
2. Baby	Fischer-Blindo	07/15/91 F	22 yrs, 9 mos	08/12/09
3. Baxter	Fleischer	04/29/14 F	1 day	
4. Bartholome	Flickinger	11/06/97 M	16 yrs, 5 mos	04/20/14

Below the table, it says "Please enter your choice: 1". At the bottom of the window, there are several buttons: "Create Patient" (highlighted with a red circle), "Advanced Search", "Prev View", "Next View", "Select View", and "Start Over".

### Step 3: Fill Out Basic Patient Information

Fill in each field, pressing **Enter** or **Tab** to move from field to field.

Pat PCC: 3439		Patient Editor		Page 1 of 4	
First Name:	Barney	Born:	Feb 2, 2012		
Nickname:	Bam Bam	Age:	2 yrs, 4 mos		
Middle Name:		Sex:	Male		
Last Name:	Rubble	Deceased:	No		
Suffix:	Jr	Deceased Date:			
Physician:	Beverly Crusher, MD				
Status:	Adoption				

In the "Born" field, you can type the birth date in many different formats; "082401" will be translated into August 24th, 2001. The "Physician," "Status," and "Referring Physician" fields are look-up fields. In a look-up field, you can use an abbreviation or enter an asterisk (\*) to view a list of possible entries.

**Follow Your Office's Standards:** Some medical practices do not assign a primary care physician. Some practices have rules for how to record a patient's full name. Other practices assign certain Status Flags for new patients. You should follow the standards that your practice uses when entering data.

### Step 4: Fill In the Four Custom Boxes

The four boxes below the patient's basic information are customizable. Your office may use them for a special purpose.

Other ID:		Note:	Rubble
School:	Bedrock Central	Old PM ID :	2755

### Step 5: Press [F7 - New Cust Account] to Assign an Account

<b>Patient Lives With:</b>		<b>Send Bill To:</b>	
Name:	ERROR! No Custodial Account.	Name:	ERROR! No Billing Account.
Address:	Please change this.	Address:	Please change this.
City:		City:	
State:	Zip Code:	State:	Zip Code:
Home Phone:		Relation to Bill Payer:	
Work Phone:		Date of Last Visit:	
Temp Phone:		Date of Last Physical:	
Alt Phone:		Date Due for Next Physical:	
Save	Inms Record	New Cust Account	New Bill Account

You must tell Partner who the custodian and guarantor accounts are for this patient. The patient's family account may already exist in Partner, or you may need to create a new family account. In either case, press [F7 - New Cust Account] to start the process.

## Step 6: Find Existing Account or Add a New Account

Enter the name of the family with whom your new patient lives.

```

                                Custodial Account Selection
Please enter an account:
First Name: Fred                ( F6) Repeat last search:
Last Name: Flinstone           (

```

If the family already exists in Partner, you will be brought back to the **notjane** screen and the account you selected will be listed under the "Patient Lives With" and "Send Bill To" sections.

If you can not find the account, press [F2 - Create Account].

```

                                Custodial Account Selection
I could not find anyone named Fred Flinstone.
I did find some people who had similar names.

```



```

                                Create
                                Account

```

## Step 7: Fill Out Account Information

If you are adding a new account to Partner, fill out the family name and basic information.

```

Acct PCC: 1964                Add Account                Page 1 of 3
First: Fred
Last: Flinstone
Home Phone: 800-722-1082
Work Phone:
Temp Phone:
Alt Phone:
Addr: 18 Bedrock Ln
City: Bedrock
State: NV                    Zip Code: 01234
Email:
Status:
PC Notes:
Family Notes:
SSN:
Box 4:
Box 5:
Box 6:
Last Service:
Last Bill Sent:
Last Pers Pmt:
Last Ins Pmt:
Hold Bill Till:
Budget Amt:
Personal: $ 0.00 $ 0.00 $ 0.00 $ 0.00 $ 0.00 $ 0.00 $ 0.00
Insurance: $ 0.00 $ 0.00 $ 0.00 $ 0.00 $ 0.00 $ 0.00 $ 0.00
Access MA: $ 0.00 $ 0.00 $ 0.00 $ 0.00 $ 0.00 $ 0.00 $ 0.00
Save  Default Address  Add New Patient  Notes

```

When you are finished adding account basics, press [F1 - Save] to save the new account and assign it to your new patient.

### Step 8: Review Custodian and Guarantor, Change if Necessary

After selecting or saving the patient's custodian account, Partner will return you to the Add Patient screen. You will see your chosen family assigned as both the Custodian and Guarantor account.

<b>Patient Lives With:</b>		<b>Send Bill To:</b>	
Name:	Fred Flintstone	Name:	Fred Flintstone
Address:	1400 Rock Road	Address:	1400 Rock Road
Address:		Address:	
City:	Winooski	City:	Winooski
State:	VT	State:	VT
Zip Code:	05404	Zip Code:	05404
Home Phone:	802-555-0105	Relation to Bill Payer:	Child
Work Phone:	802-555-0146	Date of Last Visit:	
Cell Phone:	802-555-0112	Date of Last Physical:	
Eng Phone:		Date Due for Next Physical:	

Buttons: Save, Edit Policies, Imms Record, Patient History, Patient Forms, New Cust Account, New Bill Account

If necessary, you can now select a *different* family as the guarantor account by pressing [F8 - New Bill Account]. Later, you can reassign either or both accounts.

### Step 9: Add Other Information

Press **Page Down** to view the other pages of the **notjane** program. For example, you can add major diagnoses and allergies as well as any important notes about the patient. You can also press [F3 - Imms Record] to enter the patient's immunization history, or [F2 - Edit Policies] to add insurance policies.

### Step 10: Press [F1 - Save]

Once you are finished entering patient information, press **F1** to save and quit. You are now ready to schedule the patient, post charges, or perform other functions.

**Two Methods:** As shown above, you can add a patient and Partner will guide you through adding or selecting the patient's guarantor and custodian accounts as you create the patient. However, if you are entering a whole family that has never before visited your Practice, you may find it faster to add the family account first, using the Family Editor (**fame**) and then add patients.

# 5. Work with Insurance Policies

Your office keeps track of insurance policy information for every patient that walks through your door. Managing those insurance policies is one of the most important functions of Partner. The Insurance Policies screen (**policy**), available from several different Partner programs, is your one-stop screen for reviewing and changing a patient's insurance information.

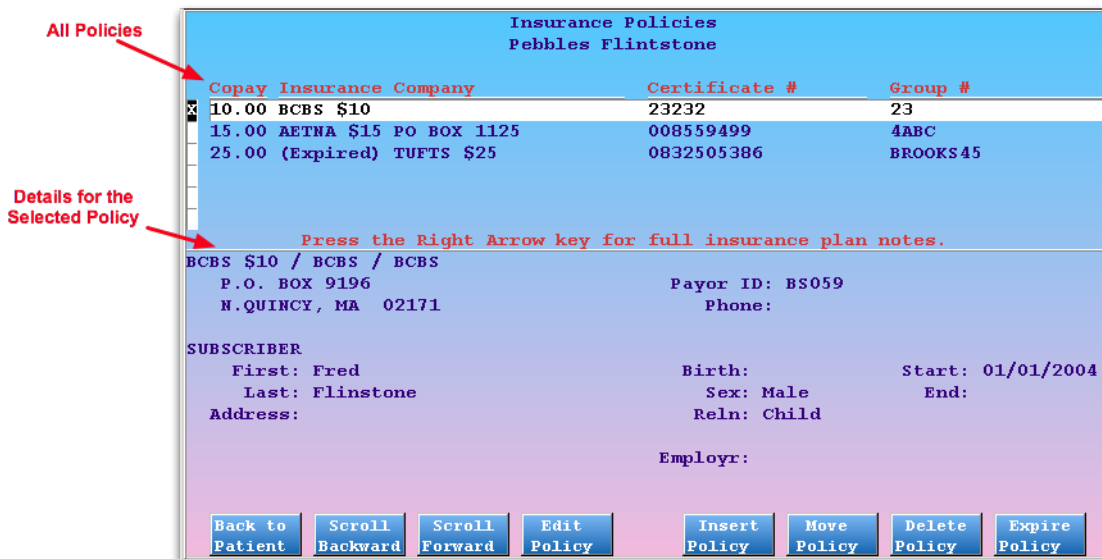
Good insurance tracking means fewer billing and collection problems. Partner's Insurance Policies screen will help you quickly and accurately track insurance information for each patient. If you have any questions, concerns or suggestions, please let us know at 1-800-722-1082.

## 5.1. View a Patient's Insurance Policies

To quickly open the **policy** screen and review a patient's insurance policies, simply run the Patient Editor (**not-jane**), find a patient, and then press [F2 -- *Edit Policies*].

**Other Ways to See the Policy List:** Many Partner programs have direct links to the Insurance Policies screen. For example, if you are at the first **checkin** screen in Partner, press [F1 -- *Check Inscos*] or **Page Down** to review insurance policies for the patient. The Charge Posting (**checkout**) program and the Patient Editor (**not-jane**) also have links to the **policy** screen.

Policies are listed briefly at the top of the screen, and the details for the selected policy are shown at the bottom:



### 5.1.1 How to Read and Interpret the Policy List

- Press the up and down arrow keys to select any policy. Once you have selected a policy, full details will appear in the box at the bottom of the screen. If the list of policies is too long to fit on the screen, press [F3 -- *Scroll Forward*] or [F2 -- *Scroll Backward*] to review the entire list. Press the right arrow key to view additional plan notes for the selected policy.
- If any subscriber details are blank, such as the name or address, Partner will generate claims using the

information from the guarantor account. If the policy holder's address is the same as the guarantor's address, you do not need to re-enter the address on the patient's policy screen.

- Unless it is expired, the first policy on the list is the patient's primary insurance. Policies are auto-sorted: expired policies are automatically moved below active policies, and Medicaid policies appear below active non-medicaid policies. You can arrange your active policies to set the primary and secondary insurances by selecting a plan and pressing [F6 -- Move Policy].

### 5.1.2 How to Make Changes

You can edit, add, move, delete, or expire an insurance policy with a few, quick keystrokes. While inserting a new policy, you also have the options to copy a recently edited policy or automatically add the new plan to the record of any siblings or family members. When expiring a policy, you will have the opportunity to expire the same plan for all patients in the same family.

The function keys for each task are self-explanatory:



Select a policy on the screen using the arrow keys, press the appropriate function key, and follow the prompts on the screen. The more detailed instructions in the sections below will guide you through each task.

**Important:** You should never *delete* an old, expired policy. There may still be outstanding balances due that company, or you may later need to know previous plan information for a patient. Instead, insert a new policy at the top of the list and expire the old policy.

## 5.2. Add a Policy

When a patient's insurance information changes, you need to add a new plan to their list of policies. You should do this *before* posting charges for the patient. Otherwise, the procedures may be billed to the wrong carrier or with the wrong information.

Follow this procedure to add a policy:

**Step 1: Press [F1 -- Insert Policy]**





Insurance Policies			
Copay	Insurance Company	Certificate #	Group #
X	Adding New Policy Here		
20.00	BCBS \$20 Empire	232323333	23
10.00	Aetna PPO \$10	00855949993500	4ABC
\$	0.00		
First:		Birth:	Start:
Last:		Sex: Female	End:
Subscriber Info:		Override Subscriber Info:	
Reln:		Reln:	
Addr:	479 Cocoa Avenue	Addr:	
City:	Plymouth	City:	
State:	VT	State:	
	Zip Code: 05056		Zip code:
F5	Insert Last Modified Policy (patient Pebbles Flinstone)		
10.00	Aetna PPO \$10	00855949993500	4ABC
Save		Use Last Modified	

A new line will appear at the top of the list of insurance policies, and blank fields will appear at the bottom of the screen.

## Step 2: Enter Policy Information

Enter policy information in the blank fields.

Copay	Insurance Company	Certificate #	Group #
\$	15.00	Cigna PPO \$15	012345678
First:	Wilma	Birth:	02/12/76
Last:	Flintstone	Sex:	Female
		Start:	01/01/07
		End:	
Subscriber Info:		Override Subscriber Info:	
Reln:		Reln:	
Addr:	479 Cocoa Avenue	Addr:	
City:	Plymouth	City:	
State:	VT	State:	
	Zip Code: 05056		Zip code:

### Keep In Mind:

- **Looking Up the Insurance Company:** For the Insurance Company field, you can use an asterisk (\*) to search through your practice's list of plans. For example, entering \*BCBS\* would show you a list of BCBS insurance plans. Depending on how your office tracks insurance companies, typing \*4624\* may show you all insurances with a P.O. Box of 4624, a handy shortcut.
- **Override Fields:** When generating claims, Partner will use the guarantor's name, address, and relationship as recorded in the **fame** and **notjane** programs. If the insurance policy holder is not the guarantor, you should fill out the name, relationship, and address fields shown above.
- **Effective Dates:** The effective dates are very important. Partner chooses which insurance

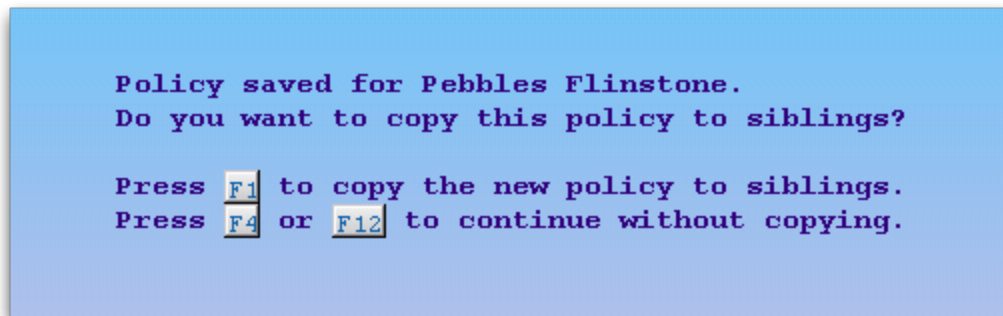
company to bill based on the effective dates. You *can* leave the date fields blank, but Partner will then assume that the insurance plan has always been valid and that the coverage has no known expiration.

### Step 3: Press [F1 -- Save]

As soon as you press **F1**, the new policy will be saved and active for this patient.

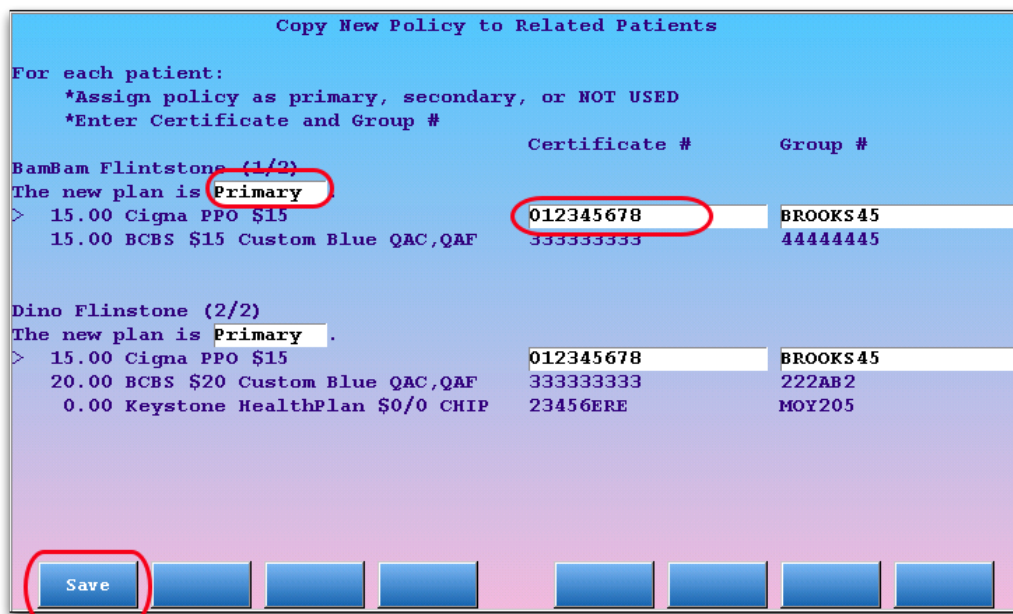
### Step 4: Optional: Copy the New Policy to Related Patients

If the new policy is not a Medicaid policy, and the patient has relatives in your system that share the same guarantor, Partner will next ask whether you wish to add the new policy to the patient's siblings. A sibling is any patient who shares a guarantor with the current patient.



Press [**F1** -- Copy Policy] to continue to the sibling screen, press [**F4** -- Do Not Copy] or **F12** to continue without modifying siblings.

On the sibling selection screen, confirm the position (primary, secondary, etc.) of the new plan and update any differences to the certificate and group numbers for each patient.



Press [**F1** -- Save] to add the plans to the sibling records.

If you do *not* wish to copy the new policy to any of these patients, press **F12**.

### Step 5: Review Your Changes

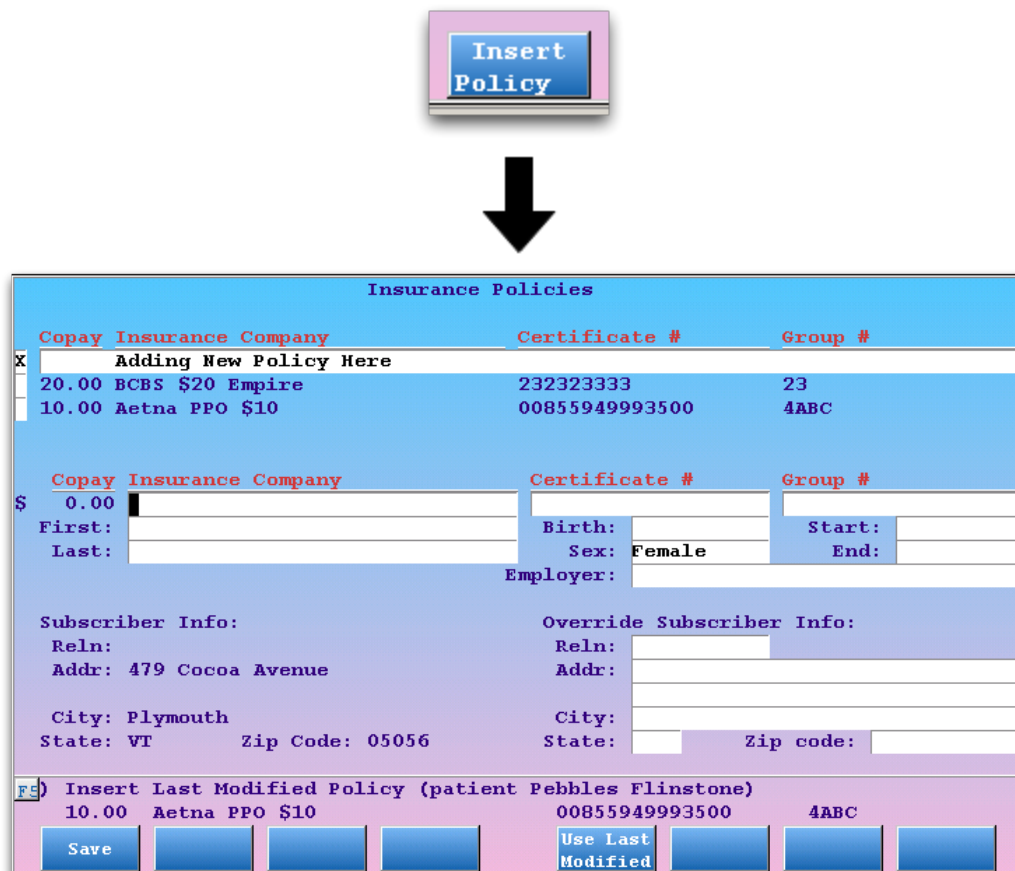
Finally, you will be returned to the main **policy** screen. After adding a new policy, you should review all active insurance policies for the patient. Is the primary insurance listed first? Do you need to expire an old policy? Use the function keys at the bottom of the screen to make any further changes to the patient policy record.

## 5.3. Copy a Policy

When adding a new policy, you may wish to copy insurance plan information from a recently edited policy elsewhere on the account. If you recently added or edited a policy for some other patient on the family, you can automatically import the entire plan to this patient's policy record.

Follow this procedure to copy the family's most recently edited policy:

### Step 1: Press [F1 -- *Insert Policy*]

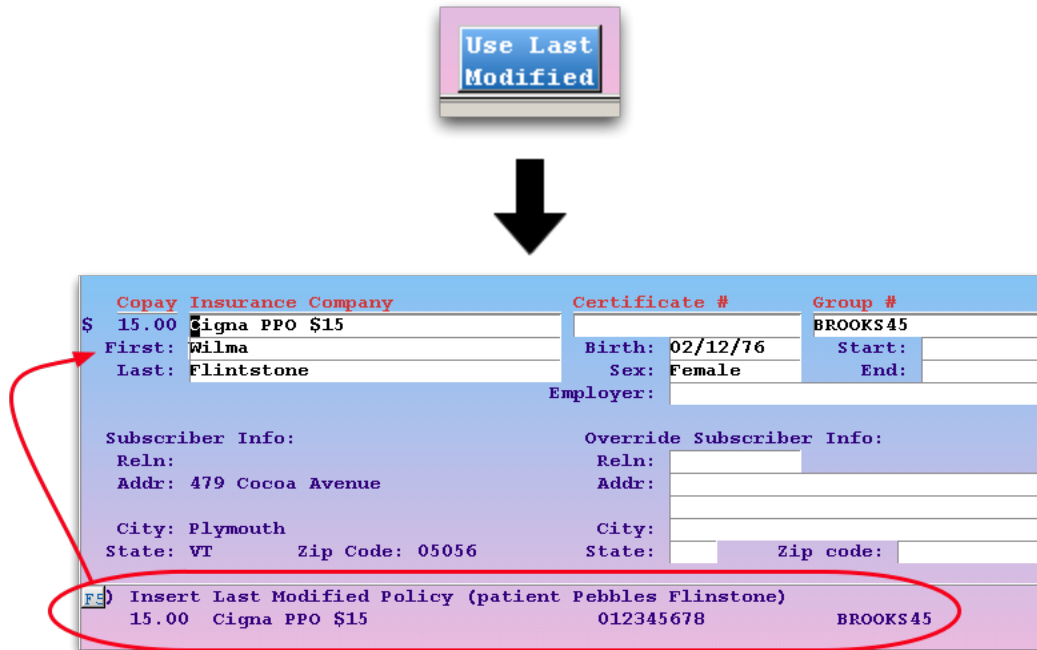


The screenshot shows the 'Insurance Policies' screen. At the top, there is a button labeled 'Insert Policy'. Below it, a large black arrow points down to the main screen. The screen has a blue header 'Insurance Policies'. Below the header is a table with columns: 'Copay Insurance Company', 'Certificate #', and 'Group #'. The table contains three rows: 'Adding New Policy Here', '20.00 BCBS \$20 Empire' (Certificate # 232323333, Group # 23), and '10.00 Aetna PPO \$10' (Certificate # 00855949993500, Group # 4ABC). Below the table are several input fields for 'Copay', 'Insurance Company', 'Certificate #', 'Group #', 'First:', 'Last:', 'Birth:', 'Sex: Female', 'Start:', 'End:', and 'Employer:'. There are also sections for 'Subscriber Info' and 'Override Subscriber Info' with fields for 'Reln:', 'Addr:', 'City:', 'State:', and 'Zip code:'. At the bottom, there is a pink bar with the text 'FE) Insert Last Modified Policy (patient Pebbles Flinstone)' and a table with columns 'Copay', 'Insurance Company', 'Certificate #', and 'Group #'. The table contains one row: '10.00 Aetna PPO \$10' (Certificate # 00855949993500, Group # 4ABC). Below this table are several buttons, including 'Save' and 'Use Last Modified'.

A new line will appear at the top of the list of insurance policies, and blank fields will appear at the bottom of the screen.

## Step 2: Press [F5 -- Use Last Modified]

This family's most recently edited policy is shown in the middle of the screen. Press **F5** to copy that policy's details into the new policy fields at the bottom of the screen.



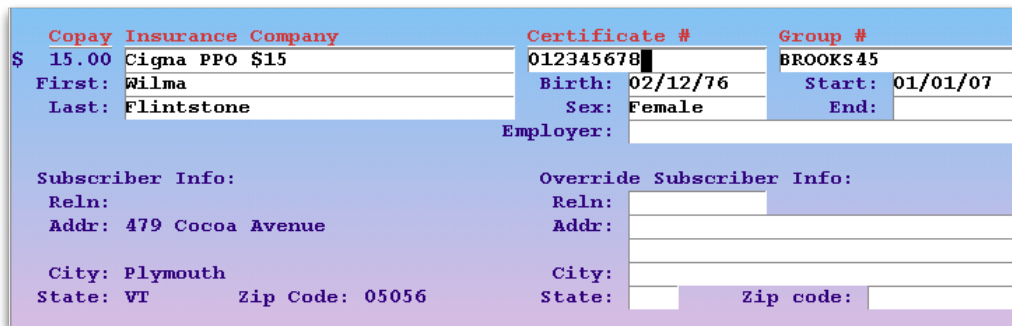
The image shows a software interface with a 'Use Last Modified' button at the top. Below it is a form with several sections. A red arrow points from the button to the form. At the bottom of the form, a row is highlighted in pink and circled in red, containing the text: **F5) Insert Last Modified Policy (patient Pebbles Flinstone)**. Below this row, the details of the copied policy are listed: 15.00 Cigna PPO \$15, 012345678, and BROOKS45.

Copay	Insurance Company	Certificate #	Group #
\$ 15.00	Cigna PPO \$15		BROOKS45
First: Wilma		Birth: 02/12/76	Start:
Last: Flintstone		Sex: Female	End:
Employer:			
Subscriber Info:		Override Subscriber Info:	
Reln:		Reln:	
Addr: 479 Cocoa Avenue		Addr:	
City: Plymouth		City:	
State: VT	Zip Code: 05056	State:	Zip code:
<b>F5) Insert Last Modified Policy (patient Pebbles Flinstone)</b>			
15.00 Cigna PPO \$15      012345678      BROOKS45			

The blank fields will be filled out with all available information from the most recently edited policy.

## Step 3: Enter or Change Policy Information

Update any information that is different for the current patient, such as the insurance certificate number.



The image shows the same software interface as in Step 2, but with updated information. The 'Certificate #' field now contains '012345678' and the 'Start' date is '01/01/07'. The 'F5' option is no longer highlighted.

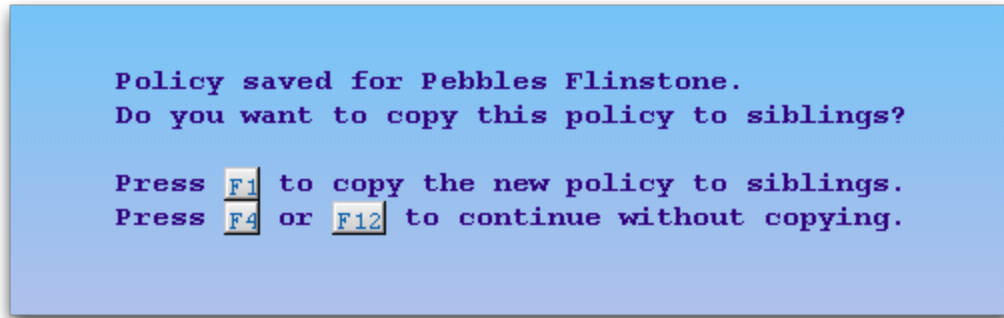
Copay	Insurance Company	Certificate #	Group #
\$ 15.00	Cigna PPO \$15	012345678	BROOKS45
First: Wilma		Birth: 02/12/76	Start: 01/01/07
Last: Flintstone		Sex: Female	End:
Employer:			
Subscriber Info:		Override Subscriber Info:	
Reln:		Reln:	
Addr: 479 Cocoa Avenue		Addr:	
City: Plymouth		City:	
State: VT	Zip Code: 05056	State:	Zip code:

## Step 4: Press [F1 -- Save]

As soon as you press **F1**, the new policy will be saved and active for this patient.

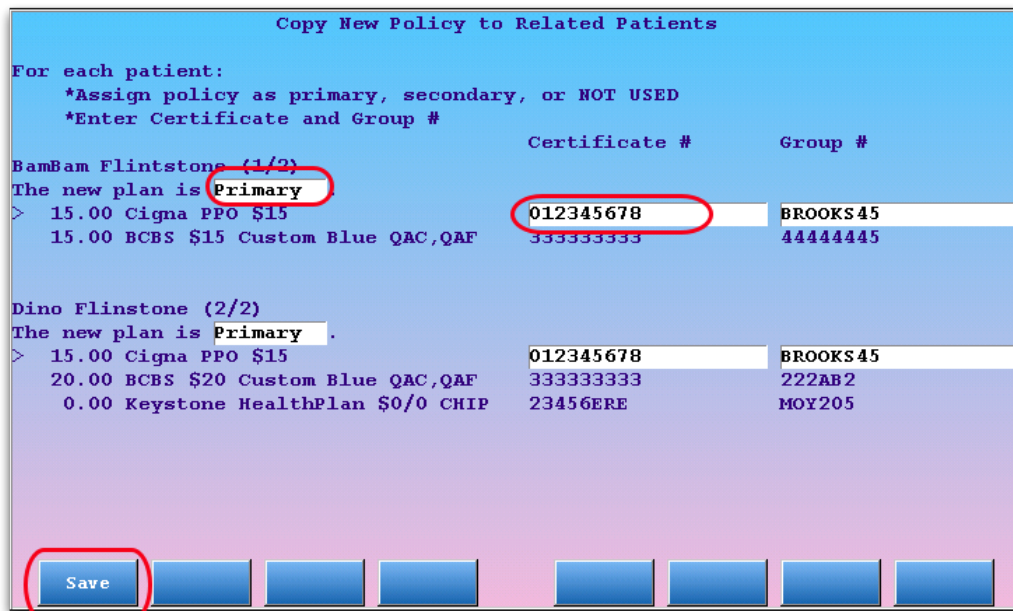
## Step 5: Optional: Copy the New Policy to Related Patients

As with the insert policy procedure, you will now be offered the option of adding the policy to the record of other patients who share the same guarantor account.



Press [F1 -- Copy Policy] to continue to the sibling screen, press [F4 -- Do Not Copy] or F12 to continue without modifying siblings.

On the sibling selection screen, confirm the position (primary, secondary, etc.) of the new plan and update any differences to the certificate and group numbers for each patient.



Press [F1 -- Save] to add the plans to the sibling records.

If you do *not* wish to copy the new policy to any of these patients, press F12.

### Step 6: Review Your Changes

Finally, you will be returned to the main **policy** screen. After adding a new policy, you should review all active insurance policies for the patient. Is the primary insurance listed first? Do you need to expire an old policy? Use the function keys at the bottom of the screen to make any further changes to the patient policy record.

## 5.4. Expire a Policy

When you add a new insurance policy to a patient, you will usually expire an old policy. When you expire an insurance policy, you will also be given the option to expire the same policy for all patients with the same guarantor.

When you wish to expire a policy, follow this procedure:

### Step 1: Select the Policy You Want to Expire and Press [F6 -- Expire Policy]

Insurance Policies Pebbles Flintstone			
Copay	Insurance Company	Certificate #	Group #
10.00	BCBS \$10	23232	23
<input checked="" type="checkbox"/> 15.00	AETNA \$15 PO BOX 1125	008559499	4ABC
25.00	TUFTS \$25	083250538609	BROOKS45
25.00	(Expired) TUFTS \$25	0832505386	BROOKS45



### Step 2: Enter the End Date

Yesterday's date will be entered automatically in the "End Date" field for the policy. You can enter a different date, indicating when the policy expires. The end date is the last date on which the selected policy should be billed for new charges.

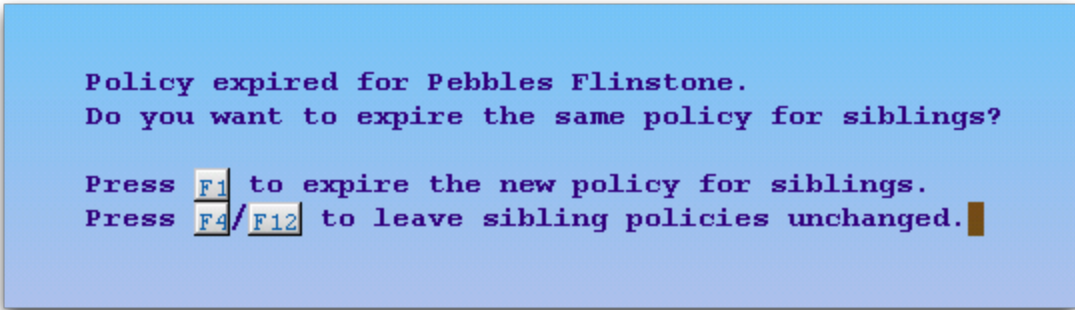
Copay	Insurance Company	Certificate #	Group #
\$ 15.00	Cigna PPO \$15	444444444	BROOKS45
First: Wilma	Birth: 02/12/76	Start: 01/01/07	End: 04/08/07
Last: Flintstone	Sex: Female	Employer:	

### Step 3: Press [F1 -- Save]

Press **F1** to save the policy's end date and expire the policy.

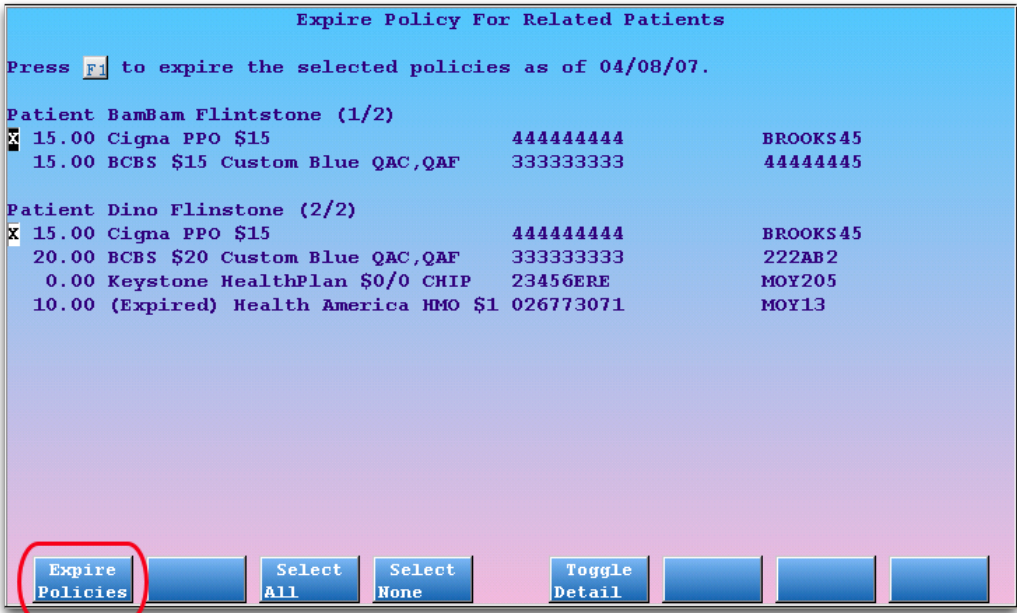
### Step 4: Optional: Expire Policy for Patient Siblings

Next, Partner will ask if you wish to expire the same policy for the patient's siblings. A sibling is any patient who shares a guarantor with the current patient.



Press [F1 -- *Expire Policy*] to continue to the sibling screen, press [F4 -- *Do Not Expire*] or F12 to continue without modifying siblings.

On the Expire Policy for Related Patients screen, review the policies for each of the siblings and press [F1 -- *Expire Policies*] to continue. You can change which policies will be expired by deselecting them or using the selection function keys at the bottom of the screen. Press F12 to cancel and leave the siblings' policies untouched.



**Toggle Detail:** If you need more information about the listed policies, press [F5 -- *Toggle Detail*].

You can only expire policies that match the one you just expired. You will not be able to select and expire a sibling's policy unless it uses the same entry in the Insurance Companies table in the Table Editor (**ted**).

**Step 5: Press [F1 -- *Expire Policies*] to Expire Selected Policies**

**Review Your Work:** The procedure above will expire a policy for one patient and any related patients you select. Remember, however, that you should always review and update each patient's policy information every time they visit your office.

## 5.5. Edit an Existing Policy

You may discover a bad certificate number, or learn that a policy is in a different parent's name and not that of the guarantor account. Follow this procedure to change information about an insurance policy that is already on an account:

### Step 1: Select a Policy

First, use the arrow keys to select the insurance policy you need to edit.

### Step 2: Press [F4 -- *Edit Policy*]

The screen will change to allow editing, and your cursor will move to the "Insurance Company" name field.

Copay	Insurance Company	Certificate #	Group #
\$ 15.00	Cigna PPO \$15	012345678	BROOKS45
First: Wilma		Birth: 02/12/76	Start: 01/01/07
Last: Flintstone		Sex: Female	End:
		Employer:	
Subscriber Info:		Override Subscriber Info:	
Reln:		Reln:	
Addr: 479 Cocoa Avenue		Addr:	
City: Plymouth		City:	
State: VT	Zip Code: 05056	State:	Zip code:

### Step 3: Make Changes

Use the **Tab**, **Enter** or arrow keys to move to the field that needs to be changed.

### Step 4: Save Your Changes

When you are finished, press [F1 -- *Save*] to save your changes. If you make a mistake or choose not to save your changes, press F12.

**Important:** You should never overwrite an existing policy with a new plan, even if only the address or the copay has changed. There may be outstanding charges pending the old policy or you may need to reference the family's insurance history. Instead, use [F5 -- *Insert Policy*]. You can then press [F4 -- *Copy a Policy*] to grab the information from the policy you wish to correct. When you finish adding the new plan, use [F8 -- *Expire Policy*] to expire the changed policy.

## 5.6. Make a Policy Primary or Secondary

When you post charges, Partner pends them to the active insurance policy on the patient's account. But what if the account has more than one active policy? Which policy is the account's primary insurance? Partner will send the charges to the first policy listed on this screen. Therefore, you may need to adjust the order of the account's active policies. Follow the procedure below.

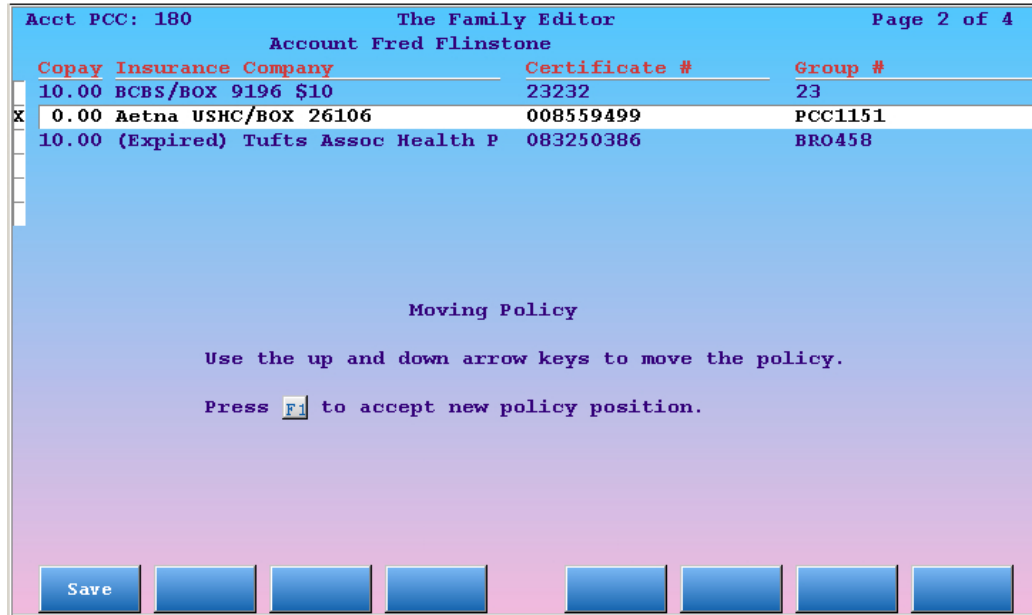
### Step 1: Select a Policy



Open a patient's policy list and select the policy you wish to move. Use the up and down arrow keys to move to the policy.

### Step 2: Press F6

Press [F6 -- Move Policy]. You will see the screen shown below:



### Step 3: Move the Policy

Use the arrow keys to move the policy where you want it. The screen will update as you move it, showing you the result of the move.

### Step 4: Press F1

When you are finished, press [F1 -- Save] to save your changes. If you make a mistake or choose not to save your changes, press F12.

## 5.7. Delete a Policy

Under rare circumstances, you may need to delete a policy from a patient's record. You should not delete expired policies under any circumstances. If any charges have been posted while a policy is active, you should not delete that policy, even if the charges were posted in error.

If you have added the wrong plan to the wrong patient, however, or the account never should have had a certain policy, you can do the following to remove it:

### Step 1: Select the Policy

Open the policy record for the patient and use the up and down arrow keys to select the offending policy.

## Step 2: Press [F7 -- Delete Policy]

You will see a warning screen.

## Step 3: Press [F8 -- Delete]

If you are certain you want to delete the selected policy, press **F8**. If you change your mind and wish to keep the selected policy, press **F12**. Once deleted, there is no way to "undelete" a policy.

## 5.8. Review Log of Policy Changes

The Policy Log (**policylog**) program displays a log of all changes made to a patient's insurance policy record.

When an insurance policy is added, edited, deleted, or moved, Partner records that action, the time and date it was performed, and the user who made the change. If an insurance policy was accidentally deleted or changed, you can run **policylog** to review the patient's past insurance records. You can also review exactly when a policy was added to a patient's record, which may help explain a billing problem.

**How Far Back?** PCC created the **policylog** program in the spring of 2007. If you need help researching policy changes made before your Partner 3.2007 update, contact PCC support.

### 5.8.1 Running Policy Log

There are two ways to run **policylog**:

- You can run **policylog** while viewing a patient's policies. First, press the right arrow key:

Insurance Policies  
Pebbles Flinstone

Copay	Insurance Company	Certificate #	Group #
10.00	UnitedHealthcare \$10	24265123406	5546BUH
10.00	Aetna MC \$10 Box 1125	8282452320302	413BC5
0.00	Medicaid	232124322	
20.00	(Expired) BCBS \$20 Empire	14142305	BC123

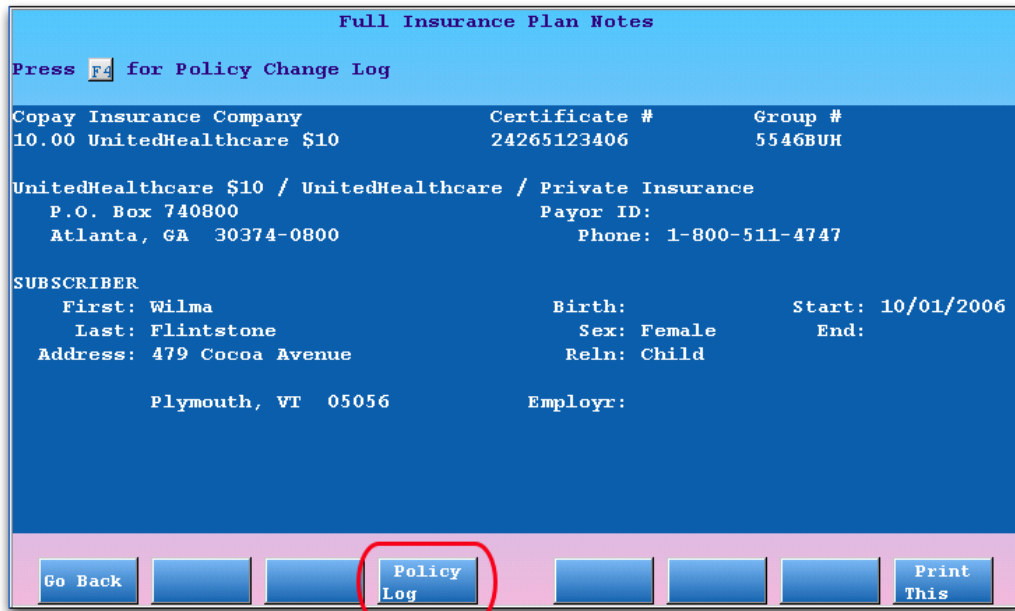
Press the Right Arrow Key for More Information

UnitedHealthcare \$10 / UnitedHealthcare / Private Insurance  
P.O. Box 740800 Payor ID:  
Atlanta, GA 30374-0800 Phone: 1-800-511-4747

SUBSCRIBER  
First: Wilma Birth: Start: 10/01/2006  
Last: Flintstone Sex: Female End:  
Address: 479 Cocoa Avenue Reln: Child  
Plymouth, VT 05056 Employer:

Scroll Backward Scroll Forward Edit Policy Insert Policy Move Policy Delete Policy Expire Policy

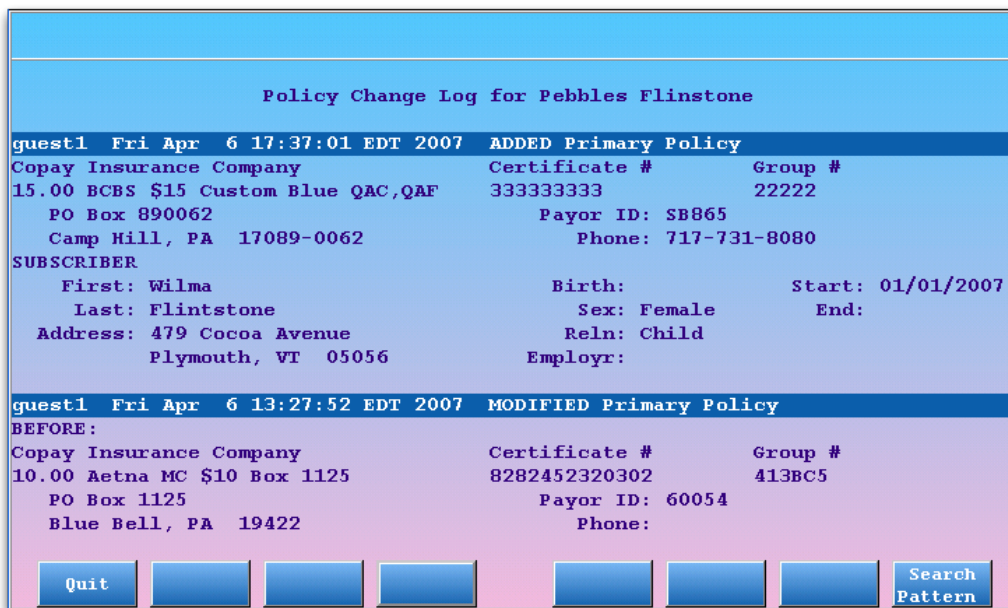
Next, press [F4 -- Policy Log].



- You can also run **policylog** as a stand-alone program, either from a command prompt or from a custom entry in your Partner Windows. Contact PCC Software Support for more information.

## 5.8.2 Reading Policy Log

The policy log is a list of entries that describe changes made to a patient's policy record. The entries are displayed in reverse-chronological order, with the most recent changes listed at the top.



You can press **Page Down** and **Page Up** to scroll through the entries page-by-page, or press the down and up arrow keys to scroll through the list one line at a time.

Each entry in the log describes one action. For each action, **policylog** displays a header with the user who made the change, the date and time the change occurred, and a description of the change.

```

Partner Username      Date and Time      Action Performed
-----
quest1  Fri Apr  6 17:37:01 EDT 2007  ADDED Primary Policy

```

The header shown above indicates that the user "quest1" added a new primary policy on Friday, April 6th, at 5:37pm.

The body of each entry shows the details of the policy affected by the change.

```

quest1  Fri Apr  6 17:37:01 EDT 2007  ADDED Primary Policy
Copay Insurance Company      Certificate #      Group #
15.00 BCBS $15 Custom Blue QAC,QAF  333333333      22222
PO Box 890062                Payor ID: SB865
Camp Hill, PA 17089-0062     Phone: 717-731-8080
SUBSCRIBER
  First: Wilma                Birth:            Start: 01/01/2007
  Last: Flintstone           Sex: Female      End:
  Address: 479 Cocoa Avenue   Reln: Child
  Plymouth, VT 05056         Employr:

```

The primary policy that quest1 added was a BCBS policy with a \$15 copay.

**More Complex Changes:** When a plan is moved or modified in some way, the body of the entry will include a "Before and After" section to show the change that was made:

```

quest1  Fri Apr  6 17:49:10 EDT 2007  MODIFIED Primary Policy
BEFORE:
Copay Insurance Company      Certificate #      Group #
15.00 BCBS $15 Custom Blue QAC,QAF  333333333      22222
PO Box 890062                Payor ID: SB865
Camp Hill, PA 17089-0062     Phone: 717-731-8080
SUBSCRIBER
  First: Wilma                Birth:            Start: 01/01/2007
  Last: Flintstone           Sex: Female      End:
  Address: 479 Cocoa Avenue   Reln: Child
  Plymouth, VT 05056         Employr:
AFTER:
Copay Insurance Company      Certificate #      Group #
15.00 BCBS $15 Custom Blue QAC,QAF  444444444      22222
PO Box 890062                Payor ID: SB865
Camp Hill, PA 17089-0062     Phone: 717-731-8080
SUBSCRIBER
  First: Wilma                Birth:            Start: 03/01/2007
  Last: Flintstone           Sex: Female      End:
  Address: 479 Cocoa Avenue   Reln: Child
  Plymouth, VT 05056         Employr:

```

In the example above, quest1 changed the certificate number on the BCBS plan from 333333333 to 444444444. The policy's start date was also changed from 1/01/2007 to 3/01/2007.

**Modified or Expired?** Policy expiration is shown in **policylog** with a "MODIFIED" header. When you expire a policy, **policylog** records that as a modification.

### 5.8.3 Searching the Log of Insurance Policy Changes

If a patient's insurance record has been changed several times, it can be difficult to find specific information. Press [F8 -- Search Pattern] to perform a search.



Search Pattern: **bcbs** Search on whole words: **No**

After typing a search term, press **Enter**. The results of your search will be highlighted and the screen will automatically scroll to the first search result.

```
guest1 Fri Apr 6 17:49:10 EDT 2007 MODIFIED Primary Policy
BEFORE:
Copay Insurance Company Certificate # Group #
15.00 BCBS $15 Custom Blue QAC,QAF 333333333 22222
PO Box 890062 Payor ID: SB865
Camp Hill, PA 17089-0062 Phone: 717-731-8080
SUBSCRIBER
First: Wilma Birth: Start: 01/01/2007
Last: Flintstone Sex: Female End:
Address: 479 Cocoa Avenue Reln: Child
Plymouth, VT 05056 Employr:
AFTER:
Copay Insurance Company Certificate # Group #
15.00 BCBS $15 Custom Blue QAC,QAF 444444444 22222
PO Box 890062 Payor ID: SB865
Camp Hill, PA 17089-0062 Phone: 717-731-8080
SUBSCRIBER
First: Wilma Birth: Start: 03/01/2007
```

Press [**F7** -- *Search For Next*] to jump to the next result.

### 5.8.4 Conclusion

By researching a patient's **policylog** record, you can recover lost insurance information, discover insurance updating problems at your practice, and improve communication in your office. Contact PCC Support at (800)-722-1082 or <support@pcc.com> if you have any questions.

# 6. Merge Duplicate Patients and Accounts

If your office has created duplicate patients or family accounts, you may need to merge them. Merging two patients combines data and saves a single set of basic demographic information. Merging two accounts combines the account billing and charge data so that it appears all of it occurred under one account.

Do *not* merge accounts if a family has remarried or divorced or made other status changes. Instead, use the features in **notjane** to reassign guarantor and custodian information appropriately. Keep the old account in place, as it probably includes account and patient-related history that should exist on its own.

**Proceed With Caution:** Combining two patients or two accounts is a permanent action. Partner keeps a background log of merge activity, but recreating separate account histories later is very difficult. Only combine patients and accounts when you are certain that they were created in error.

**Merging PCC EHR Chart Data?** When you merge patients in Partner 4.7 (released in January of 2011), the corresponding medical records will also merge in PCC EHR. If your office uses PCC EHR, exercise extreme caution when merging patients. Recreating individual medical records is very difficult and time-consuming.

## 6.1. Merge Two Patient Records Using "Movekid"

Follow the procedure below to combine two duplicate patient accounts.

### Step 1: Move Both Patients to the Same Family Account

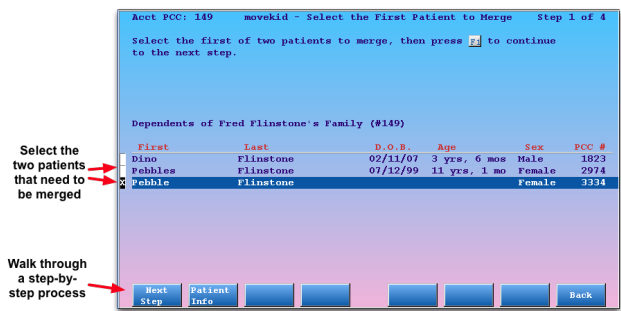
Run the Patient Editor (**notjane**) and use the [F4 - *Reassign Account*] tool to move the duplicate patients so they are both on the same account, if they are not already.

### Step 2: Run Combine Two Patients (movekid)

You can find **movekid** in the Account/Patient Tools window, or you can type **movekid** at a command prompt.

### Step 3: Follow the Onscreen Instructions

The **movekid** program will help you find an account (by either patient or account name), choose two dependents to combine, select which demographic data to keep, and then confirm and finalize the merge.



While you work, you will see options for reviewing the patient records and for printing out a record of the merge before finishing.

## **6.2. Merge Two Family Accounts, Combining Billing Histories**

Follow the procedure below to combine two family accounts. Be aware that merging accounts will irrevocably combine all billing history.

### **Step 1: Run Combine Two Accounts (moveacct)**

You can find **moveacct** in the Account/Patient Tools window, or you can type **moveacct** at a command prompt.

### **Step 2: Find the Two Accounts You Wish to Merge**

Starting with the account that your office created in error, find both accounts using the standard find routines.

### **Step 3: Confirm and Finalize the Merge**

Partner will ask you one last time whether or not you wish to proceed with the account merge. Answer Y or N to finish.