2016 User Meeting Intellect Presentation

Presented by
Celeste Seibert, *Project Manager*

➢ **INTELLECT PRESENTATION Part 1**
Schedule & Registration Features:
- Real-Time Eligibility Verification
- Patient Self Check-In
- NoShow & Cancellation Emails & Letters
- Recall Letters
- Calls, Text & Email Messaging Options
- Patient Survey
- Credit Card options
- Appointment List
- Surgery Tab & Surgery List
- Q&A

➢ **Guest Speaker: *Medicare***

➢ **BREAK**

➢ **INTELLECT PRESENTATION Part 2**
 Charges & Billing Features:

- Charge Posting Options
- Bill Unpaid Copay/Deductible
- Advanced Setup for ICD10
- Charge Review
- View Claim Files
- Posting ERA files
- Management Reports
- Office Task Manager
- New Features *coming soon*
- Online Resources
- Q&A

➢ **Guest Speaker: Krissy Balch,** *Prime Billing Service*

Scheduling & Registration Features

Schedule & Registration Features

Real-Time Eligibility Verification

Schedule & Registration Features

Real-Time Eligibility Verification

➢ **Ver. Stat** :
  - Blank when eligibility has not been run or not available.
  - Date highlighted in gray when 270 eligibility request file sent.
  - Date highlighted in green when 271 eligibility response file received.

➢ **Inquire:** Opens *Inquire Appointment* screen to view patient's **Eligibility History** .

Eligibility History screen

➤ Expand the Insurance column to view the Insurance Phone Number.

Also able to access from **Add Appointment** & **Modify Appointment** screens.

Eligibility Verification

➢ *Doctor's Appointments* & *Day's Appointments* options will only verify for Appointment Types where **Utility → Set Up → Appointment → Appointment Type <Verify Eligibility >** is set to 'Y'.

➢ Hide specific types of eligibility verification messages from the *Eligibility History* tab when **Utility → Messages → Eligibility Remark** <Status> fields is set to '**N**'.

➢ *For PCM users:* Now able to view the Eligibility Verification information from the Appointment List in PCM.

Self Check-In Feature

➢ For clinics wishing to utilize this feature, Intellect comes equipped with an appointment check in and/or self-schedule option.

➢ Self Check In allows scheduled patients to check in and walk-in patients to be added to the current day's schedule for specific appointment types, either as first available or restricted by provider.

➢ All of this can be accomplished with minimal Staff involvement.

➢ Check-in can be accomplished through a magnetic stripe card reader, a keyboard or touch-screen monitor in the waiting room.

➢ Conditions for Self Check In:
   ▪ For walk-in patients, it only schedules for the current day.
   ▪ If a patient has a previously scheduled appointment for that day, he/she can only check in.
   ▪ Minimal setup required to use this feature.

Schedule & Registration Features

Self Check-In: Schedule → Appointment → Self Check In
Allows patient to check in from waiting room.

Welcome to PRIME CLINICAL SYSTEMS.

Please slide your ID card, driver license or enter your name to check in.

First Name :

Last Name:

Date Of Birth:

Social Security Number:

Check In

Prime
CLINICAL SYSTEMS

Have you ever been in this office before?

YES   NO

I couldn't find your information in our system

Please enter folowing information and press Register button to continue.

First Name :   Last Name:

Date Of Birth: Gender:

Address:

City: State: Zip Code:

Home Phone: Cell Phone:

Primary Insurance:

Subscriber First Name: Subscriber Last Name:

Subscriber No: Group No:

Co Payment: Deductible: Valid Until:

Supplemental Insurance:

Subscriber First Name: Subscriber Last Name:

Subscriber No: Group No:

Co Payment: Deductible: Valid Until:

Register   Cancel

Self Check-In Feature

Options available:

➢ Verify demographic/insurance information for existing patients

➢ Schedule walk-in appointment

➢ Credit Card payments via Authorize.net for CoPayment and/or Patient Balance.

Our records indicate your balance on account is 100..

Do you want to make a payment by credit card now?

| YES | NO |

Please Slide Your Credit Card

Card No:	
Name On Card:	
Expiration Date:	
CoPayment Due:	0.00
Balance Due:	100.00
Balance Payment:	100.00

| PROCESS | CANCEL |

Schedule & Registration Features

No Show & Cancel Appointments

No Show & Cancellation Emails & Letters:
Utility → Set Up → Appointment → Appointment Type

Field	Value
Appointment Type	F/U
Description	FOLLOW UP
Length of Appointment	15
Maximum Per Time Slot	2
Am/Pm (A/P)	
Facility	
Provider	
Book Patient	Y
Appointment Group	0
Requires Summary of Care Document	N
Super Bill (Y/N/X)	Y
Super Bill File (Super)	SB1
Super Bill Form (PRN)	SB1
Recall	RC1
Access To Appointment	N
No Show	NOSHOW
Cancel Code	CANCEL
Reminder Days	
Color Code	
Self Sched Treating Provider	Y
Self Sched First Available	Y
Self Sched Description	
Email File	
Email Message	
CallSTAFF Reminder	Y
Exclude from MU Data	N
Create Appointment Reminder	Y
Verify Eligibility	Yes
Email Referring for No Show	WC No Show
Email Referring for Cancelation	WC Cancelled
Email Patient for No Show	Patient No Show
Email Patient for Cancelation	Patient Cancelled
Send Email/SMS	Yes

Emails and/or Letters will automatically generate when appointments are Canceled or marked as NoShow.

Patient Letter for NoShow

Patient Letter for Cancellation

Emails To Referring

Emails to Patient

No Show & Cancellation Emails
Based on Appointment Types

➢ Fields on **Appointment Type** screen:

  ▪ Email Referring for NoShow
  ▪ Email Referring for Cancellation

> To Referring

  ▪ Email Patient for NoShow
  ▪ Email Patient for Cancellation

> To Patient

➢ Automatically send 2 emails for the encrypted letter and the password.

➢ Notification sent when appointment is missed or cancelled:

  ▪ Referring Provider or Attorney for WC
  ▪ Patient

Email set up required for this feature

Referring No Show & Cancellation Email samples

*Sample of **WC No Show** letter emailed to Referring based on Appointment Type.*

YOUR PROVIDER'S FULL NAME
YOUR PROVIDER'S ADDRESS
YOUR PROVIDER'S CITY, STATE & ZIP CODE

PATIENT'S FULL NAME
PATIENT'S ADDRESS
PATIENT'S CITY, STATE & ZIP CODE

MONTH DD, YYYY

Dear **PATIENT'S TITLE & FULL NAME**,

We would like to thank you for being a patient in our office. We value all our patients and strive to provide the best medical care possible in the most comfortable setting.

We missed seeing you for a scheduled appointment at **APPOINTMENT FACILITY NAME** with **APPOINTMENT PROVIDER'S FULL NAME**.

Please understand that when we schedule your appointment, we are reserving time for your particular needs. We kindly ask, if you must change an appointment, please give us at least 24 hours notice. This courtesy makes it possible to give your reserved time to another patient who would like it.

We know that your time is valuable. When your appointment is made, a room is reserved and your records are prepared for your visit. Except in the case of an emergency treatment for another patient, you can expect us to be running on schedule.

Thank you very much for your understanding. Please call us at **CLINIC PHONE NUMBER** should you have any questions.

Sincerely,

PROVIDER'S FULL NAME

CC: **REFERAL COMPANY NAME**
                 REFERAL'S FULL NAME

*Sample of **WC Cancelled** letter emailed Referring based on Appointment Type.*

YOUR PROVIDER'S FULL NAME
YOUR PROVIDER'S ADDRESS
YOUR PROVIDER'S CITY, STATE & ZIP CODE

PATIENT'S FULL NAME
PATIENT'S ADDRESS
PATIENT'S CITY, STATE & ZIP CODE

MONTH DD, YYYY

Dear **PATIENT'S TITLE & FULL NAME**,

We would like to thank you for being a patient in our office. We value our patients and strive to provide the best medical care possible in the most comfortable setting.

We regret that your cancelled your appointment at **APPOINTMENT FACILITY NAME** with **APPOINTMENT PROVIDER'S FULL NAME**.

Please call our office to reschedule your appointment at **CLINIC PHONE NUMBER**.

Sincerely,

PROVIDER'S FULL NAME

CC: **REFERAL COMPANY NAME**
                 REFERAL'S FULL NAME

Patient No Show & Cancellation Email samples

*Sample of **Patient No Show** letter emailed to Patient based on Appointment Type.*

YOUR PROVIDER'S FULL NAME
YOUR PROVIDER'S ADDRESS
YOUR PROVIDER'S CITY, STATE & ZIP CODE

PATIENT'S FULL NAME
PATIENT'S ADDRESS
PATIENT'S CITY, STATE & ZIP CODE

MONTH DD, YYYY

Dear **PATIENT'S TITLE & FULL NAME**,

We missed seeing you for a scheduled appointment at **APPOINTMENT FACILITY**
with **APPOINTMENT PROVIDER'S FULL NAME**.

Our goal is to offer the best possible care to our patients, we are
concerned when you are unable to keep your appointment. Please call us
at **CLINIC PHONE NUMBER** to reschedule the appointment for a date and time
that will work for you.

We understand circumstances may arise which make it impossible for
you to keep the appointment. Should this happen in the future,
please call us as soon as you know the appointment will be missed.
The earlier you let us know, the more likely we may offer your
scheduled appointment time to another patient.

We hope to hear from you soon.

Sincerely,

PROVIDER'S FULL NAME

---

*Sample of **Patient Cancelled** letter emailed Patient based on Appointment Type.*

YOUR PROVIDER'S FULL NAME
YOUR PROVIDER'S ADDRESS
YOUR PROVIDER'S CITY, STATE & ZIP CODE

PATIENT'S FULL NAME
PATIENT'S ADDRESS
PATIENT'S CITY, STATE & ZIP CODE

MONTH DD, YYYY

Dear **PATIENT'S TITLE & FULL NAME**,

We missed seeing you for a scheduled appointment at **APPOINTMENT FACILITY NAME**
with **APPOINTMENT PROVIDER'S FULL NAME**.

Our goal is to offer the best possible care to our patients, we are
concerned when cancel your appointment. Please call our office
at **CLINIC PHONE NUMBER** to reschedule the appointment for a date and time
that will work for you.

We hope to hear from you soon.

Sincerely,

PROVIDER'S FULL NAME

Schedule & Registration Features

Track Sent Emails: Misc → View Sent Items

Clinic	UserName	Subject	▲ To	Date	Comment	Status
1	Prime Clinical	Appointment Reminder		03-09-2011 08:58 AM		SENT
1	Prime Clinical	Appointment Reminder		03-10-2011 11:27 AM		SENT
1	Prime Clinical			01-15-2015 10:32 AM		ERROR:EMail was no...
1	Prime Clinical	Appointment Reminder		03-30-2015 09:42 AM		ERROR:EMail was no...
1	Prime Clinical	Appointment Reminder		03-30-2015 09:42 AM		ERROR:EMail was no...
1	Prime Clinical	Appointment Reminder		03-30-2015 09:42 AM		ERROR:EMail was no...
1	Prime Clinical	Appointment Reminder		03-30-2015 09:42 AM		ERROR:EMail was no...
1	Prime Clinical	Appointment Reminder		03-30-2015 09:42 AM		ERROR:EMail was no...
1	Prime Clinical	Appointment Reminder		03-30-2015 09:43 AM		ERROR:EMail was no...
1	Prime Clinical	Appointment Reminder		03-09-2011 08:57 AM		SENT
1	Prime Clinical	Appointment Reminder		03-09-2011 08:53 AM		SENT
1	PHYSICIANS R US	Financial		07-23-2010 08:53 AM		SENT
1	Prime Clinical	Appointment Reminder		03-09-2011 08:56 AM		SENT
1	Prime Clinical	Appointment Reminder		03-10-2011 11:29 AM		SENT
1	Physicians R Us	Appointment Reminder		01-18-2011 05:13 PM		SENT
1	PHYSICIANS R US	Financial		03-28-2013 01:38 PM		ERROR:null
1	PHYSICIANS R US	Financial		07-22-2010 03:31 PM		SENT
1	PHYSICIANS R US	Thanks to Referring		07-22-2010 03:32 PM		SENT
1	PHYSICIANS R US	Financial		07-22-2010 03:45 PM		SENT
1	PHYSICIANS R US	Financial		07-23-2010 08:53 AM		SENT
1	PHYSICIANS R US	Thanks to Referring		07-23-2010 08:53 AM		SENT

NEW FEATURE: Happy Birthday/New Year Email Notices

- ➢ Send a birthday greeting to patients on or before their birthday.

- ➢ Send a New Year's greeting to all patients at the beginning of the year.

- ➢ Limit the emails to only patients seen within a specific timeframe such as 2 years.

- ➢ Contact PCS support to setup automated emails with custom images and text.

Tech Injection MD
2029 Western Avenue
Pasadena, CA 91105
(626) 445-1328
Support@primeclinical.com

Prime
CLINICAL SYSTEMS

Happy Birthday, Hamid!

Health is the greatest gift, contentment the greatest wealth, faithfulness the best relationship. (Buddha)

We hope you have a wonderful day, and we wish you a happy and healthy year!

Sincerely,

Tech Injection Md

Make an Appointment   Visit our Website   Take a Survey

NEW Recall Letter Options: Based on Panel codes

➢ Automatically generate future recall letters based on <Panel Code> used when posting charges.

➢ For <Panel Code>, set **Utility → Procedure → Procedure <Recall in Month(s)>** to determine how many months after the posted charge, the recall letter will be generated.

➢ <Message Code> & <Remark Code> for the Recall Letter MUST be the same as the <Panel Code>.

Utility → Messages → Remark

Remark Code	99385
Description	RECALL: ANNUAL EXAM
Remark Type	R ▼
Security Level	

Message Code 99385

```
According to our records, you are due for your annual exam.  Please
call our office at (555)555-5555 at your earliest convenience to
schedule an appointment.

Thank you for your attention.

Appointment Desk
```

Utility → Messages → Message

NEW Recall Letter Options: Based on ICD10 codes

➢ Automatically generate future recall letters based on <Diagnosis Code> used when posting charges.

➢ For <Diagnosis Code>, set **Utility → Diagnosis → Diagnosis <Recall in Month(s)>** to determine how many months after the posted charge, the recall letter will be generated.

➢ <Message Code> & <Remark Code> for the Recall Letter MUST be the same as the <Diagnosis Code>.

Utility → Messages → Remark

Remark Code	Z0000
Description	RECALL: ANNUAL EXAM
Remark Type	R ▼
Security Level	

Message Code Z0000

According to our records, you are due for your annual exam. Please call our office at (555)555-5555 at your earliest convenience to schedule an appointment.

Thank you for your attention.

Appointment Desk

Utility → Messages → Message

Scheduling & Registration Features

Phone Calls, Text & Email Messaging options

➢ **Appointment Reminders** via phone, email and/or text message with confirmation option.

➢ Send appointment information via email or text when scheduling new appointments.

➢ Generate **Message** for patients with scheduled appointments

➢ Additional **Text to Voice** call options for:
  - Recall Letters
  - News Letters
  - Aging Reports

REQUIREMENTS:
  - *Utility → Set Up → Appointment → Appointment Type <CallSTAFF Reminder>* & *<Send Email/SMS>* determine which appointments generate reminders.
  - Third Party Vendor **Twilio** needed for ALL 'Text-to-Voice'/phone call options and Text Message Appointment Reminders with confirmation.
  - Email Setup required for ALL Email options and Text Messaging without confirmation.

Schedule & Registration Features

Messaging Feature: *Doctor running late?*
No Problem! Automatically Email, TEXT or Call the patient!

Right click & select Message:
- Select Patient
- Doctor's Appointment
- Day's Appointments

Schedule & Registration Features

Messaging Feature: *Patient Alert*
Select Email, Text Message OR Phone Call for the custom message.

'Subject' used for Email only.

Limited number of characters for Text Message. Unlimited for Emails

You may pre-record a standard custom message (MP3 format) or type in the text that will be read.

Third Party Vendor *Twilio* is needed for <u>all phone call recordings</u>.

Patient Alert...

Doctor: [ ] Patient: [ ]
From: 12:15 PM To: 11:59 PM

☑ Text Message ☑ Email
Subject: Doctor is running late.
Message: The doctor is running late. Please show up for your appointment one-hour later.

Thank you,   Physicians R Us

☑ Phone Call
○ Pre-Recorded Message
   xxxx ▼
● Text To Speech
   If you bring in 3 or more viable patient referrals, you'll receive a gift certificate to Starbucks from us!

   Thank you,   Physicians R Us

[Send] [Cancel]

Schedule & Registration Features

Recalls: Voice Message (via Twilio)

It's quick, easy
& cost effective!

Instead of sending
recall letters, send a
voice message instead!

Twilio is needed

Print GOP_RECALL

Selection Criteria	
Account From	
Account To	
From Date	05/01/2016
To Date	05/01/2016
Print Type	Text To Voice
Remark Code	NOSHOW

Print   Clear   Exit

Schedule & Registration Features

Send News Letters
Text to Voice Message (via Twilio)

Example: Text to Voice Message.

Send to Patient, Guarantor or Guardian

Example: Pre-Recorded Voice Message.

Either send a pre-recorded **Voice Message** OR **Text to Voice Message**.

Requires Twilio!

Call Log

☒ Call History

Requests To Call:

ID	Date	Time	User	Reason	Message
81	05/15/13	09:47 ...	81	Recall Print	Recall
62	05/14/13	08:13 ...	75	Report Aging	Dear,,,,,,,,,%{PA_TITLE} %{PA_LAST_NAME} A recent review of our medical records indicate that you
61	05/14/13	08:10 ...	75	Report Aging	Dear,,,,,,,,,%{PA_TITLE} %{PA_LAST_NAME} A recent review of our medical records indicate that you
59	05/14/13	07:50 ...	81	APPOINTMENT	MESSAGE
58	05/14/13	07:49 ...	81	APPOINTMENT	MESSAGE
57	05/14/13	07:47	81	APPOINTMENT	MESSAGE

Status:

| Name	Account	Phone No.	App. Date	Status
xxx, x x	530	(626) 716-2033		completed
rr, ee e	762	(343) 545-6666		failed
TRAN, WON T	602	(626) 716-2033		completed
Shamasi, Mary	11	(626) 857-1134		completed
LAMBERT, JUDY	1453	(626) 716-2033		completed
JENSON, ROB	315	(626) 716-2033		completed
FREDRICKSON COMP, REGI...	1	(626) 716-2033		completed
Doe, Roy	843	4343788814		failed
DRANACHE, LUCY M	100	(626) 444-4444		completed
DILLARD, WILLIAM L	3772	(626) 616-0351		completed
ARASH, BEHZADIAN M	51200	(222) 222-2222		
ADKINS, LAURIE	230	(626) 716-2033		completed

Select the **Call Status** icon and review the status of:
Appointment Reminders, Recalls, Aging Report & Newsletter Calls.

Schedule & Registration Features

Patient Surveys

➢ Surveys may be automatically emailed to your patients regarding the services they received at their last appointment.

➢ Surveys are emailed to all patients the day after their appointment.

➢ The questions in the survey are standard, with multiple choice selections such as Excellent, Good, Fair, and Poor.
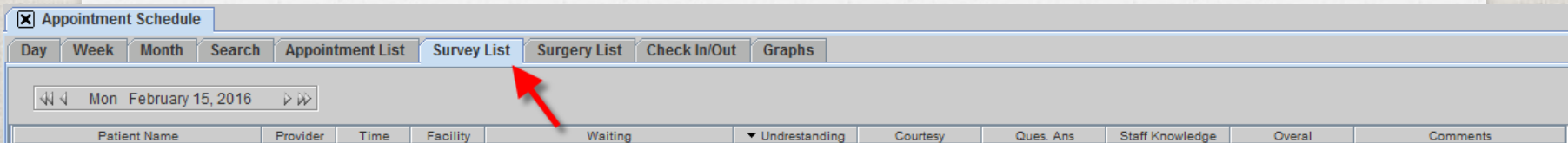
➢ The Survey List only displays information for patients who respond to the survey.

➢ Survey responses can be viewed as Pie, Line or Bar Graph on **Graphs** tab.

NOTE: Set up is required before this feature may be used.

Sample: Email & Survey

Dr. john doe md

hamid office
3675 E HUNTINGTON DR #A
PASADENA, CA 91107-5648
Phone: (626) 449-1705

Map it with Google

Dear Mr. hamid amjadi,

Our main goal is to provide you with high quality compassionate medical care. We know how important your visit is with us, and we would like you to get everything you expect from your time here. Your feedback is very important to us and we appreciate you taking a moment to help us enhance our service by filling out our short survey.

Take the Survey

Sample survey:

We appreciate you taking a moment to help us enhance our service by taking this survey.

1) Did you have a prescheduled appointment?
- ○ Yes
- ○ No

2) How long did you have to wait before you were seen?
- ○ Less than 15 Minutes
- ○ 15 to 30 Minutes
- ○ 30 to 45 Minutes
- ○ Over 45 Minutes

3) How would you rate the courtesy you were shown by our staff?
- ○ Excellent
- ○ Good
- ○ Fair
- ○ Poor

4) How would you rate the way your questions were answered?
- ○ Excellent
- ○ Good
- ○ Fair
- ○ Poor

Encrypt Patient Credit Card Information: Registration → Credit Card

- Patients often pay with a CREDIT CARD…Now
- Store encrypted credit card information.
- MUST be using Authorize.net for credit card authorization.

Schedule & Registration Features

Registration Charges **Payment** Account Ledger Date Billing Management Utility Schedule Misc Support Help Messenger Clinical Exit

| Open_Item |
| Auto Payment |
| Guarantor Payment |
| Apply Receipt |

[X] Payment

Batch: Account: Name: Message:

Balance: Deductible: Copay: Category:

Amount Paid: Src Pay: Src Adjustment: Post To:

From: To: Method: Check:

C	L#	W	Date	Code	Dr.	Charge	Approved	%	CoPay	Payment	Deduct	Adjust	Message	Balance	Comment

Automatically process posted payment with patient's stored Credit Card.

Total Charges Total Payment: Total Adjustment: Total Balance:

☐ Credit Card Payment ☐ Print Bill Commit/Exit Undo Changes Cancel/Exit

Processing Credit Card Payments

➤ When using **Authorize.net** for Credit Card Payments, payments can be processed through:
- **Add Receipt** screen
- **Self Check-in**
- **Patient Portal:** Payment instructions on statement.

NOTE: *For these options, the credit card payment is* <u>processed</u> *immediately, but the payments will need to be* <u>posted</u> *to the patient accounts through the* ***Payment → Apply Receipt*** *screen (automatically post all entries) OR manually for individual accounts through the* ***Payment → Open Item*** *screen.*

Additional setup is required to implement these options.

Schedule & Registration Features

Appointment List

- ➢ **Confirmation:** *Status updated automatically for reminder call, email and/or text.*
- ➢ **Ver Status**: *Date highlighted in green when eligibility response received.*
- ➢ *Posted charges highlighted in blue*

- ➢ **Print**: Registration, SuperBill, Patient's Appointments or Doctor's Appointments.
- ➢ Add **Receipt**
- ➢ **Post Charges**: Enter charges for specific patient on **Charges →Charge** screen.
- ➢ **Post Super Bill**: Enter charges from onscreen Superbill.
- ➢ **RX:** Write RX (Only with Intellect Stand Alone)

Schedule & Registration Features

Surgery Tab on *Modify Appointment* screen

- ➢ Track date forms completed & Received

- ➢ Enter notes

- ➢ Track ICD-10 & CPT codes for surgery

- ➢ Print forms for patients

- ➢ Post charges

- ➢ Enter **Auth No** to attach encounter

Schedule & Registration Features

Surgery List

➢ Shows appointments when Surgery tab is updated.

➢ Context Menu options:
- ▪ **Inquire:** view Appointment screen
- ▪ **Print:** Registration, Super Bill, Patient's Appointments or Doctor's Appointments
- ▪ **Receipt**
- ▪ **Post Charges:** posts Diagnosis & Procedure from Surgery tab.
- ▪ **Post Super Bill:** post charges from onscreen Super Bill

Time for Questions!

Guest Speaker

Medicare

15 Minute Break
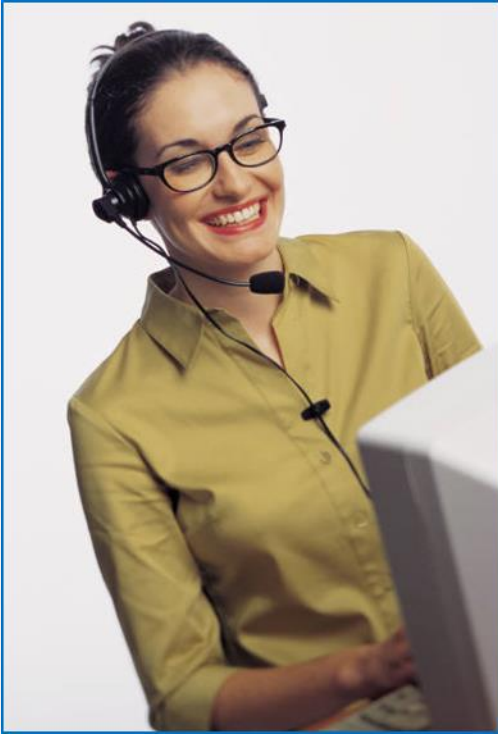
Charges & Billing Features

Intellect Options for Post Charges

➢ **Charge → Charge** menu

➢ Appointment Schedule:
- **Appointment List** Tab
  - ○ **Post Charges**
  - ○ **Post Super Bill**
- **Surgery List** Tab
  - ○ **Post Charges**
  - ○ **Post Super Bill**
- Appointment Window "SURGERY" Tab

*NOTE: **Post Super Bill** option requires setup of diagnosis & procedure codes for onscreen Superbill.*

Schedule & Registration Features

Post Super Bill from Appointment List

Post Super Bill screen

Charge & Billing Features

Bill Copay/Deductible: Charges → Charge screen

➢ It is now possible to bill patients for unpaid co-pays using the **Bill Copay/Deductible** option on the Context (right click) menu.

➢ When pop up box appears, enter **Expected** <u>Copay</u>, <u>Deductible</u> and/or <u>Co-insurance</u> amounts.

Print Unpaid Co-payment/Deductible on Statement **TODAY!**

- ➢ Patient Statement prints **Co-payment / Deductible Due**.

- ➢ Charge amount and total balance remain unchanged.

- ➢ Insurance is still responsible for the outstanding charge.

STATEMENT

02/15/2016   PAGE: 1

If paying by credit card, please complete the information below and mail to the billing department in the envelope provided.......

FROM: ORGANIZATION NAME
3675 E.Huntington Dr.
PASADENA, CA 91107
(626) 449-1705

CHECK ONE: AMOUNT APPLIED TO CREDIT CARD   CREDIT CARD NUMBER
☐VISA ☐MC

PRINT CARDHOLDER NAME   CARD EXPIRATION DATE

CARDHOLDER SIGNATURE (X)   DATE SIGNED   /   /

DOE, JANE
1204 WHITTIER AVE
TOMS RIVER, NJ 08753-6963

ACCOUNT NO: 1133
CATEGORY: PPO
INSURANCE: BCBSNJ

AMT. ENCLOSED

PLEASE RETURN THIS PORTION WITH YOUR PAYMENT

DATE	DOCTOR	DESCRIPTION	CHARGE	PAYMENT	ADJUSTMENT	BALANCE
		PREVIOUS BALANCE				0.00
10/02/14	TEST	Co-payment/Deductibl	5.00	0.00	0.00	5.00
01/31/16	TEST	Co-payment/Deductibl	5.00	0.00	0.00	5.00

REMARKS

Your account is 90 days past due. Further delay in payment will result in collection action. Your insurance has been billed.

REGARDLESS OF ANY INSURANCE COVERAGE, THE TOTAL BALANCE DUE IS THE LEGAL OBLIGATION OF THE PATIENT.

5.00	0.00	0.00	5.00	10.00
CURRENT	OVER 30 DAYS	OVER 60 DAYS	OVER 90 DAYS	AMOUNT DUE

Charge & Billing Features

Unpaid Copay/Deductible: Ledger → Open Item or Accounting

➤ <Charge> highlighted in **red** on *Open Item Ledger* only when Expected Co-Pay, Deductible and/or Co-insurance unpaid.

➤ Context menu option *View CoPay/Deductible Due* will display unpaid amounts.

➤ Amounts entered either at the time the charges were posted or on **Charges → Modify** screen.

Charge & Billing Features

Unpaid Copay/Deductible: Charges → Modify [Information]

> ➢ Able to modify the Expected/Unpaid amounts AFTER charges posted.
> ➢ Unpaid amounts will appear on the patient Statement.
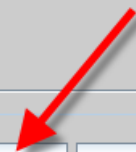
Charge & Billing Features

Posting Patient Payments: Charges → Charge screen

➢ **NEW OPTION:** Post patient payments quickly to multiple lines using 'J' to jump while posting charges.

- Distribute payment & discount proportionally to all lines for CASH patients.
- Apply payment to selected charge lines where patient is responsible, such as purchased products or administrative fees.

Press **[J]** to post the payment.

Advanced Set Up for ICD10

➢ **Utility → Diagnosis → Diagnosis:**
- ▪ Create **Abbreviation** shortcuts for similar diagnosis codes.
- ▪ Track billable ICD10 codes.

➢ **Utility → Diagnosis → Crosswalk:**
- ▪ Customize codes that appear on Crosswalk Lookup.

Have you updated your Super Bill(s) with ICD-10 codes?
- ✓ Send updated Superbill in Microsoft Word format to Prime Clinical Systems.
- ✓ A proposal/authorization will be sent for approval to client prior to programming.
- ✓ If using forms in PCM, you have free reign to update anytime!

NOTE: Update release 16.10.11 contains 1700+ new ICD10 codes for 2017!

Charge & Billing Features

Advanced Set Up for ICD10: Utility → Diagnosis → Diagnosis

Registration Charges Payment Account Ledger Date Billing Management Utility Schedule Misc Support Help Messenger Clinical Exit

[X] Modify DIAGNOSIS

Diagnosis Code	N390
Abbreviation	UTI
ICD9/ICD10 Code	N390
ICD9/ICD10	ICD10
Description	URINARY TRACT INFECTION, SITE NOT S
Color	
Gender (M/F/X/R)	X
Group	
UDS Group	
Age From	
Age To	
Retire Code	N
Alternate Diagnosis	
Billable	Yes
webStaff Access	Y

<< BACK   NEXT >>   Modify   Clear   Exit

Create @ shortcut for Diagnosis <Code> field on **Charges → Charge** screen.

Diagnosis...
Code @UTI

Indicates code is the highest level of specificity. Warning will appear on **Charges → Charge** when set to 'N'.

There are other diagnoses with higher level of specificity to choose from. Would you like to continue with this diagnosis code?

Yes   No

Charge & Billing Features

Advanced Set Up for ICD10: Utility → Diagnosis → Crosswalk

➢ Crosswalk was pre-loaded if ICD9 & ICD10 setup in **Utility → Diagnosis → Diagnosis** prior to 10/01/2015 effective date.

➢ User can add new codes & customize the sorting order for Crosswalk Lookup that appears on **Charges → Charge** screen when ICD9 entered.

☒ Modify CrossWalk				
ICD9 782.0			Description PARESTHESIA	

CMD	Custom	Priority	ICD10	Description
	Y	1	R200	Anesthesia of the skin
	Y	2	R201	Hypoesthesia of skin
	Y	3	R202	Paresthesia of skin
	Y	4	R203	Hyperesthesia
	Y	6	R208	Other disturbances of skin sensation
	Y		R209	Unspecified disturbances of skin

- If Priority is 0 (zero) or blank, diagnosis code will be omitted from displayed listed.
- Entering numbers greater than zero will determine the sorting order.

Charge & Billing Features

Advanced Set Up for ICD10: Charge → Charge screen

Charge & Billing Features

ICD10: Online Resources

✓ Visit CMS **http://www.cms.gov/ICD10**

✓ Visit **Client Login** our website at **www.primeclinical.com** and select **OnSTAFF/Intellect Info → ICD10**

Contents	Index	Search	Print	- Search -

Home > ICD-10 Resources

- ICD-10 Resources
- Preparing for ICD-10
- ICD-10 Timeline
- ICD-10 Video Tutorials
- ICD-10 Q & A

ICD-10 Resources

Welcome to our ICD-10 education resource center!

Intellect & PCM Resources
Specific Intellect information is available in the sections noted below. As we move closer to the new ICD-10 deadline of October 1, 2015, Prime Clinical Systems will be providing additional documentation and training resources for our clients.

- Intellect Video Tutorials
- Prime Clinical Q & A (this also includes some information for PCM users)
- Standalone ICD-10 Lookup Program -- Released 06/2015

Industry Resources
This website primarily contains information provided by the industry, so many of the resources on these pages are links to the CMS website www.cms.gov/ICD10.
Please also check the Table of Contents for additional learning options.

Charges → Charge Review : Review/Edit Imported Charges

☒ Edit Charge Review

➢ ***Charge Review*** is a feature originally designed for clients who post charge data in Patient Chart Manager (PCM) which is imported into Intellect.

➢ This option can also be used to review charges posted in Intellect if <Import Source> is **All Charges**.

➢ This option allows clients to review the claims on screen and then change the responsibility to either put the claims on hold or release them for billing.

➢ Most clients who import charges have the Who column (responsibility) set to Y when imported so they may review the claims before billing.

Field	Value
From Date	04/12/2016
To Date	04/12/2016
Date Selection	Entry Date
Who	P All Primary Ins
Billed/Unbilled	Unbilled
Import Source	Imported charges
Sort By	Insurance
Facility	
Provider	
Category	
Primary Insurance	
Secondary Insurance	
Operator Code	

Edit   Clear   Exit

Charge Review *continued*

➢ **Review claims imported from PCM prior to billing insurances**
- Easily change 'Who' column to insurance or patient responsibility
- Leave or put claims on hold until confirmed
- Attach encounters to claims
- Scrub claims
- Make corrections
- Submit claims electronically

➢ **Never lose track of imported charges or charges put on hold!**

Charge & Billing Features

Charge Review *continued*

➢ The multi-line table allows users to view all charges, including those entered in Intellect or imported from an outside source such as PCM, as requested on the Edit Charge Review screen.

☒ Charge Review

Account	1007	Name	DOE, JANE D				
Home	(925)123-4567	Emp Name	Good Eats	Referring	JOHN X DOE, MD	Facility	COMMUNITY HOSPITAL
DOB	08/01/1970	Category	WC	Guarantor	DOE, JANE D	Guar Phone	(925)123-4567
Diag	M545	Diag		Diag		Diag	
Primary	STATE COMP INS FUND	Phone		Sub#	333333333	Claim	1234567
Cov From	01/01/2012	Cov To		Grp#		AdjName/Phone	SAM SLADE, Mr./(925) 111-
Secondary		Phone		Sub#		Claim	
Cov From		Cov To		Grp#		AdjName/Phone	/

Acc	Name	Dr	Billing...	DOS	Code	Mod	Description	W...	Ins	Charge	Payment	Adjustm...	Balance
1007	DOE, JANE D	MXS	MXS	10/02/2015	99213		TEST PROCEDURE	P1	STAT	90.00	0.00	0.00	90.00
		MXS	MXS	10/02/2015	99214		TEST PROCEDURE	P1	STAT	0.00	0.00	0.00	0.00
		BING	BING	10/02/2015	99214		EST PT OV LEVEL 4	P1	STAT	150.00	0.00	0.00	150.00
		MXS	MXS	01/28/2016	99214		EST PT OV LEVEL 4	P1	STAT	100.00	0.00	0.00	100.00
		MXS	MXS	01/28/2016	26055		office visit	P1	STAT	0.00	0.00	0.00	0.00
										340.00	0.00	0.00	340.00
1008	DOE, FRED	MXS	MXS	09/01/2015	99214		EST PT OV LEVEL 4	P1	BCCA	0.00	0.00	0.00	0.00
		MXS	MXS	09/01/2015	26055		office visit	P1	BCCA	0.00	0.00	0.00	0.00
										0.00	0.00	0.00	0.00
1012	test, patient	BING	BING	05/01/2015	99214		TEST PROCEDURE	P1	BCCA	0.00	0.00	0.00	0.00
		BING	BING	10/02/2015	99213		TEST PROCEDURE	P1	BCCA	90.00	-90.00	0.00	0.00
		BING	BING	10/10/2015	99213		TEST PROCEDURE	P1	BCCA	90.00	-60.00	0.00	30.00
										180.00	-150.00	0.00	30.00
1023	DUCK, DON...	FAMILY	FAMILY	04/16/2015	99214		EST PT OV LEVEL 4	P1	MCAL	125.00	0.00	0.00	125.00
		BING	BING	05/01/2015	99213		TEST PROCEDURE	P1	MCAL	85.00	0.00	0.00	85.00
										210.00	0.00	0.00	210.00
1041	SMITH, MARY	BING	BING	09/01/2015	99214		EST PT OV LEVEL 4	P1	BCCA	0.00	0.00	0.00	0.00
		BING	BING	09/01/2015	26055		office visit	P1	BCCA	0.00	0.00	0.00	0.00
		BING	BING	09/15/2015	99214		EST PT OV LEVEL 4	P1	BCCA	0.00	0.00	0.00	0.00

Tag Options

| Transfer to Insurance | Transfer to Patient | Put on Hold | Scrub | CreateXML | Submit | Print Claim | Print UB Form |

Highlight Options

| Diagnosis | Charge Info | Claim Requirement | Encounter | Patient | Facility | Provider | Referring | Insurance |

Charge & Billing Features

Charge Review *continued*

➢ **Tag Options:**
- Action will be applied to all Tagged line items.
- Must press [T] next to line items to tag.
- Press [A] to tag ALL lines or [N] to untag ALL lines.

Tag Options

Transfer to Insurance	Transfer to Patient	Put on Hold	Scrub	CreateXML	Submit	Print Claim	Print UB Form

➢ **Highlight Options:**
- Action will be applied to the highlighted line item.
- Allows corrections to be made before using Tag Options.

Highlight Options

Diagnosis	Charge Info	Claim Requirement	Encounter	Patient	Facility	Provider	Referring	Insurance

Charge & Billing Features

Charge Review *continued*

➤ **Tag Options**

Account	1041		Name	SMITH, MARY					Facility	Pasadena Medical Clinic
Home	(626) 555-1111		Emp Name	SouthWest Hospital		Referring			Facility	Pasadena Medical Clinic
DOB	11/21/1967		Category	IMSP		Guarantor	SMITH, MARY		Guar Phone	(626) 555-1111
Diag	789.00		Diag	753.9		Diag	724.1		Diag	945.35
Primary	BLUE CROSS		Phone			Sub#	XLU354810555		Claim	
Cov From	01/01/2015		Cov To			Grp#	G65411		AdjName/Phone	/
Secondary	NORIDIAN MEDICARE		Phone	(866) 749-4301		Sub#	A654646464		Claim	
Cov From	01/01/2015		Cov To			Grp#			AdjName/Phone	/

Acc	Name	Dr	Billing...	DOS	Code	Mod	Description	W...	Ins	Charge	Payment	Adjustm...	Balance
1007	DOE, JANE D	MXS	MXS	10/02/2015	99213		TEST PROCEDURE	P1	STAT	90.00	0.00	0.00	90.00
		MXS	MXS	10/02/2015	99214		TEST PROCEDURE	P1	STAT	0.00	0.00	0.00	0.00
		BING	BING	10/02/2015	99214		EST PT OV LEVEL 4	P1	STAT	150.00	0.00	0.00	150.00
		MXS	MXS	01/28/2016	99214		EST PT OV						
		MXS	MXS	01/28/2016	26055		office visit						
1008	DOE, FRED	MXS	MXS	09/01/2015	99214		EST PT OV						
		MXS	MXS	09/01/2015	26055		office visit						
1012	test, patient	BING	BING	05/01/2015	99214		TEST PRO						
		BING	BING	10/02/2015	99213		TEST PRO						
		BING	BING	10/10/2015	99213		TEST PRO						
1023	DUCK, DON...	FAMILY	FAMILY	04/16/2015	99214		EST PT OV LEVEL 4	P1	MCAL	125.00	0.00	0.00	125.00
		BING	BING	05/01/2015	99213		TEST PROCEDURE	P1	MCAL	85.00	0.00	0.00	85.00
										210.00	0.00	0.00	210.00
1041	SMITH, MARY	BING	BING	09/01/2015	99214		EST PT OV LEVEL 4	P1	BCCA	0.00	0.00	0.00	0.00
		BING	BING	09/01/2015	26055		office visit	P1	BCCA	0.00	0.00	0.00	0.00
		BING	BING	09/15/2015	99214		EST PT OV LEVEL 4	P1	BCCA	0.00	0.00	0.00	0.00

- Press 'T' to tag individual line items or 'A' to tag ALL lines.
- When Tag Option selected it will be applied to ALL highlighted lines.

Tag Options

| Transfer to Insurance | Transfer to Patient | Put on Hold | Scrub | CreateXML | Submit | Print Claim | Print UB Form |

Highlight Options

| Diagnosis | Charge Info | Claim Requirement | Encounter | Patient | Facility | Provider | Referring | Insurance |

Charge & Billing Features

Charge Review *continued*

Charge & Billing Features

Charge Review *continued*

☒ Charge Review

Account	1007	Name	DOE, JANE D			Facility	COMMUNITY HOSPITAL
Home	(925)123-4567	Emp Name	Good Eats	Referring	JOHN X DOE, MD		
DOB	08/01/1970	Category	WC	Guarantor	DOE, JANE D	Guar Phone	(925)123-4567
Diag	M545	Diag		Diag		Diag	
Primary	STATE COMP INS FUND	Phone		Sub#	333333333	Claim	1234567
Cov From	01/01/2012	Cov To		Grp#		AdjName/Phone	SAM SLADE, Mr./(925) 111-
Secondary		Phone		Sub#		Claim	
Cov From		Cov To		Grp#		AdjName/Phone	/

Acc	Name	Dr	Billing...	DOS	Code	Mod	Description	W...	Ins	Charge	Payment	Adjustm...	Balance
1007	DOE, JANE D	MXS	MXS	10/02/2015	99213		TEST PROCEDURE	P1	STAT	90.00	0.00	0.00	90.00
		MXS	MXS	10/02/2015	99214		TEST PROCEDURE	P1	STAT	0.00	0.00	0.00	0.00
		BING	BING	10/02/2015	99214		EST PT OV LEVEL 4	P1	STAT	150.00	0.00	0.00	150.00
		MXS	MXS	01/28/2016	99214		EST PT OV LEVEL 4	P1	STAT	100.00	0.00	0.00	100.00

Charge Information

Apply To All*	From Date	To Date	Category*	Facility	Referring Dr*	Billing Provider	Assignment*	Qty	Who*
☐	10/02/2015	10/02/2015	WC	IP	REF123	MXS	Y	1	P1

Mod	RDX	Billing Date*	Sec. Bill Date*	Time From	Time To	Insurance Code*	Sec. Insurance*	Batch	En#
	1					STAT		0	0

Modify   Exit

Tag Options

| Transfer to Insurance | Transfer to Patient | Put on Hold | Scrub | CreateXML | Submit | Print Claim | Print UB Form |

Highlight Options

| Diagnosis | Charge Info | Claim Requirement | Encounter | Patient | Facility | Provider | Referring | Insurance |

Charge & Billing Features

Charge Review *continued*

Charge & Billing Features

View Claim Files

➤ **Easy to Track** – list is in descending date order by calendar date for files generated in the last 90 days.

➤ **INS** indicates to which clearinghouse electronic claims were sent.

➤ **Control No.** which indentifies the electronic claims file will appear on reports from the clearinghouse & *Electronic Billing Report* generated when claims submitted.

Billing **Manageme**

Insurance	▶
Statement	▶
Tele Com	▶
Follow Up	▶
Worker	▶
Company	▶
OSHPD	
View Claim Files	

☒ View CLAIM_FILES

CMD	Date	Operator	INS	Control No	Count	Amount	Reject	Status
	02/10/2016			0	1	180.00		Claims were sent to the printer.
	02/10/2016			0	1	400.00		Claims were sent to the printer.
	02/09/2016		MCAR	54915	8	1860.00		
	02/09/2016			0	5	273.44		Statements were sent to the printer.
	02/09/2016		ENS	54918	2	3225.00		
	02/09/2016			0	1	975.00		Claims were sent to the printer.
	02/08/2016		MCAR	54909	11	3665.00		
	02/08/2016		ENS	54912	1	525.00		
	02/08/2016			0	29	2065.39		Statements were sent to the printer.

Charge & Billing Features

ERA Posting : Payment → Auto Payment

Auto Payment

Field	Value
Carrier Type:	Insurance
From:	
To:	
Payment:	
File Name:	/home/staff/ERA/1-2-2016-11-14-27.01
Insurance Code:	**Clearinghouse Code**
src-pay:	
src-adjustment:	
Post Payment/Report:	Report
	Report
	Pay & Report
Check:	
Print Bill:	No
Provider Code:	
Category Code:	
Batch No.:	UNIQUE # FOR EACH FILE
Adjust Cross Over:	No
Credit Card Payment:	No
Primary/Sec/All:	All

Commit/Exit   Cancel/Exit
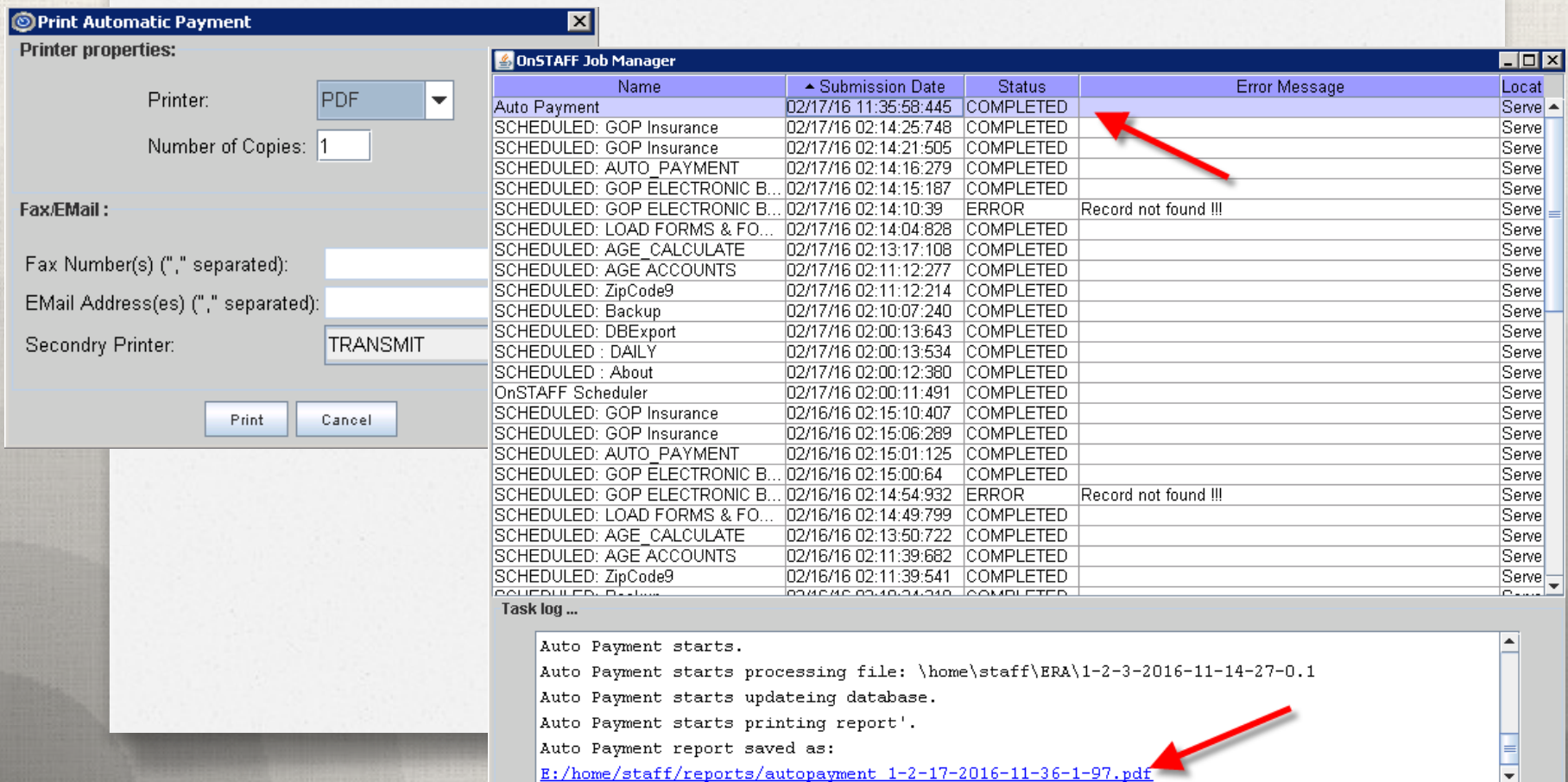
Press [F2] to display list of downloaded ERA files. Select filename to reprint or post ERA.

Select File...

ERA
- 1-2-3-2016-11-14-27-0.1
- 1-2-3-2016-11-14-28-1.1
- 1-2-3-2016-11-15-0-2.1
- 1-2-3-2016-11-15-1-3.1
- 1-2-3-2016-11-15-33-4.1
- 10-20-2015-9-3.zip
- 2-2-10-2016-2-1-8-0.2
- 2-2-11-2016-2-1-18-0.2
- 2-2-12-2016-2-0-43-0.2
- 2-2-16-2016-2-1-39-0.2
- 2-2-16-2016-2-1-39-1.2
- 2-2-4-2016-2-1-2-0.2
- 2-2-5-2016-2-1-26-0.2
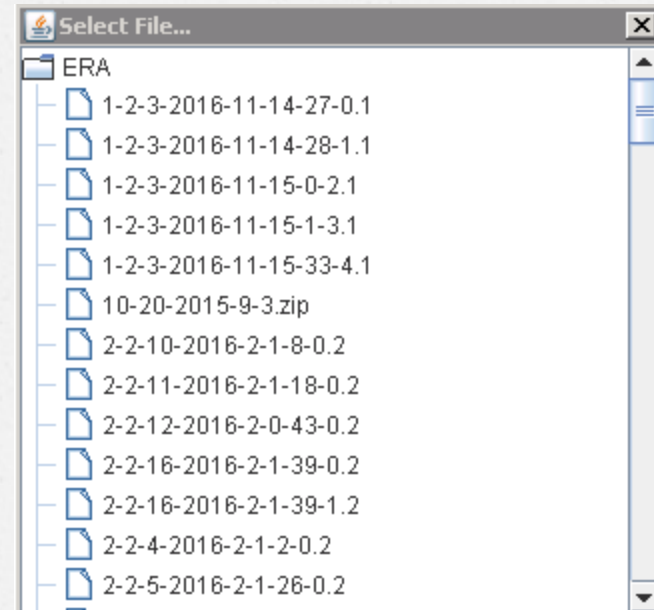
Charge & Billing Features

ERA Posting : Automated Payment Journal

- ➢ SAVE PAPER! Print to 'PDF' then view file onscreen or save PDF.
- ➢ Press **[Ctrl][J]** OR select *Job Manager* ic
- ➢ Highlight print job then click on PDF file listed in Task Log to view.

Print Automatic Payment

Printer properties:

Printer:	PDF
Number of Copies:	1

Fax/EMail :

Fax Number(s) ("," separated):

EMail Address(es) ("," separated):

Secondry Printer: TRANSMIT

Print   Cancel

OnSTAFF Job Manager

Name	Submission Date	Status	Error Message	Locat
Auto Payment	02/17/16 11:35:58:445	COMPLETED		Serve
SCHEDULED: GOP Insurance	02/17/16 02:14:25:748	COMPLETED		Serve
SCHEDULED: GOP Insurance	02/17/16 02:14:21:505	COMPLETED		Serve
SCHEDULED: AUTO_PAYMENT	02/17/16 02:14:16:279	COMPLETED		Serve
SCHEDULED: GOP ELECTRONIC B...	02/17/16 02:14:15:187	COMPLETED		Serve
SCHEDULED: GOP ELECTRONIC B...	02/17/16 02:14:10:39	ERROR	Record not found !!!	Serve
SCHEDULED: LOAD FORMS & FO...	02/17/16 02:14:04:828	COMPLETED		Serve
SCHEDULED: AGE_CALCULATE	02/17/16 02:13:17:108	COMPLETED		Serve
SCHEDULED: AGE ACCOUNTS	02/17/16 02:11:12:277	COMPLETED		Serve
SCHEDULED: ZipCode9	02/17/16 02:11:12:214	COMPLETED		Serve
SCHEDULED: Backup	02/17/16 02:10:07:240	COMPLETED		Serve
SCHEDULED: DBExport	02/17/16 02:00:13:643	COMPLETED		Serve
SCHEDULED : DAILY	02/17/16 02:00:13:534	COMPLETED		Serve
SCHEDULED : About	02/17/16 02:00:12:380	COMPLETED		Serve
OnSTAFF Scheduler	02/17/16 02:00:11:491	COMPLETED		Serve
SCHEDULED: GOP Insurance	02/16/16 02:15:10:407	COMPLETED		Serve
SCHEDULED: GOP Insurance	02/16/16 02:15:06:289	COMPLETED		Serve
SCHEDULED: AUTO_PAYMENT	02/16/16 02:15:01:125	COMPLETED		Serve
SCHEDULED: GOP ELECTRONIC B...	02/16/16 02:15:00:64	COMPLETED		Serve
SCHEDULED: GOP ELECTRONIC B...	02/16/16 02:14:54:932	ERROR	Record not found !!!	Serve
SCHEDULED: LOAD FORMS & FO...	02/16/16 02:14:49:799	COMPLETED		Serve
SCHEDULED: AGE_CALCULATE	02/16/16 02:13:50:722	COMPLETED		Serve
SCHEDULED: AGE ACCOUNTS	02/16/16 02:11:39:682	COMPLETED		Serve
SCHEDULED: ZipCode9	02/16/16 02:11:39:541	COMPLETED		Serve
SCHEDULED: Backup	02/16/16 02:10:24:210	COMPLETED		Serve

Task log ...

```
Auto Payment starts.
Auto Payment starts processing file: \home\staff\ERA\1-2-3-2016-11-14-27-0.1
Auto Payment starts updateing database.
Auto Payment starts printing report'.
Auto Payment report saved as:
E:/home/staff/reports/autopayment_1-2-17-2016-11-36-1-97.pdf
```

Charge & Billing Features

Ledger → Open Item (or Accounting) → Display: View Patient

Management Reports: New Options

➢ **Analysis → Utilization** Reports:
- Procedure/Modifier Utilization by Clinic
- Procedure/Modifier Utilization by Provider
- *For Workers Comp:*
  - Applicant Attorney Report
  - Claimant Attorney Report
  - Board Report
  - DEU (Disability Evaluation Unit) Report
  - Defense Attorney Report

➢ **Detail** Report:
- Benchmarking Report
- PQRS (Physician Quality Report System): Export to EXCEL only.
  - Available report criteria: Provider, Billing Provider, From Date/To, Gender, Category, Age From/To, Code C, Facility, Referring, Department, Who, Date Selection, Modifier, Zip Code.
  - Includes Tax ID, NPI, Subscriber ID#, Patient Name, Account Number, Gender, DOB, DOS, Primary Insurance, Secondary Insurance, ICD10, CPT & Modifier, POS.

Charge & Billing Features

Management Report: Procedure/Modifier Utilization by Clinic

```
                          PROCEDURE UTILIZATION REPORT

                            PRIME CLINICAL SYSTEMS
                               123 MAIN STR.
                             pasadena, CA 91107
                               (626) 716-2033
                        From : 07/01/2015    To:07/08/2015

Page: 1                                      Report prepared on: Mon Sep 14 10:03:25 By: 9999
===========================================================================================
Code        Description         Occurrence   % Patient Count Visit   Charge    Expected   Payment   Adjustment  Average
===========================================================================================
1           PANEL DESC               1  5.00       1       1      0.00      0.00      0.00      0.00        69
11-110      OFFICE/OUTPATIENT VISIT, 2 10.00       2       2     22.24     22.24      0.00      0.00        13
12          OFFICE VISIT, EST PT 1/1 1  5.00       1       1    242.00    242.00      0.00      0.00       -63
99          OFFICE/OUTPATIENT VISIT, 1  5.00       1       1     11.12     11.12      0.00      0.00       -53
99211       OFFICE/OUTPATIENT VISIT, 1  5.00       1       2     11.12     11.12      0.00      0.00       -61
99211-1232OFFICE/OUTPATIENT VISIT,   1  5.00       1       2     11.12               0.00      0.00        67
99212       OFFICE VISIT W/COPAY     1  5.00       1       1    362.30    289.84      0.00      0.00       -64
99213       OFFICE VISIT PT, COMPLEX 4 20.00       1       2     80.00     64.00      0.00      0.00        70
99214       OV EXTENDED              5 25.00       5       6    650.00    620.00      0.00      0.00        48
99214-80    OV EXTENDED              1  5.00       1       6     30.00     30.00      0.00      0.00        69
99215       OV EXTENDED              1  5.00       1       1    936.05    748.84      0.00      0.00       -47
99253       INITIAL INPT CONSULT     1  5.00       1       1    330.00    330.00      0.00      0.00        75
-------------------------------------------------------------------------------------------
                                    20                         2685.95   2369.16      0.00      0.00
-------------------------------------------------------------------------------------------
                                            Occurrence----------------------------------->         20
                                            Patient Count------------------------------->         13
                                            Visits------------------------------------->         16
                                            Charge-------------------------------------->    2685.95
                                            Expected------------------------------------>    2369.16
                                            Payment------------------------------------->       0.00
                                            Adjustment---------------------------------->       0.00
```

Charge & Billing Features

Management Report: Applicant Attorney

```
                    APPLICANT ATTORNEY UTILIZATION REPORT

                              CLINIC NAME
                              123 MAIN STR.
                           pasadena, CA 91107
                             (626) 716-2033
                    From : 08/31/2014    To:08/31/2014


Page: 1                               Report prepared on: Wed Apr 29 11:53:33 By: 9999
=========================================================================================
Code       Description           Occurrence   % Patient Count Visit    Charge    Expected      Payment   Adjustment  Average
=========================================================================================
1          First M Last, DR           4  1.50          1     1    272.62    172.24        0.00     22.24        181
AA         APPLICANTATTYFIRST W APPL  2  0.75          2     2    108.50      0.00        0.00      0.00        241
AP         Parmida m Amjadi, DOCTOR   1  0.38          1     1     31.95                  0.00      0.00        241
APP        APP J APPLICANT, M.D       2  0.75          2     2     50.00                  0.00      0.00        241
UNKNOWN    APPLICANT ATTORNEY       257 96.62        228   236  24155.15   8096.24      717.30    230.07        251
-----------------------------------------------------------------------------------------
                                    266                     24618.22   8268.48      717.30    252.31
-----------------------------------------------------------------------------------------
                                         Occurrence------------------------------>        266
                                         Patient Count--------------------------->        233
                                         Visits----------------------------------->        241
                                         Charge----------------------------------->   24618.22
                                         Expected--------------------------------->    8268.48
                                         Payment---------------------------------->     717.30
                                         Adjustment------------------------------->     252.31
```

Charge & Billing Features

Management Reports: Benchmarking

➤ Track the cost effectiveness of procedures performed by each provider based on the supplies used for each panel code billed.

```
BENCHMARKING REPORT                   Benchmarking Report
PRIME CLINICAL SYSTEMS
(626) 716-2033
Date Range:   01/01/2016-05/17/2016

Page 1                                                           Tue, May 17, 2016       11:57 AM
===============================================================================================
CODE          DESCRIPTION          SUPPLY              CHARGE     COST    QTY    PAYMENT  ADJUSTMENT   BALANCE
===============================================================================================
36556         Under Insertion of Central CSR Wrap                196.50   2.00
                                   ChloraPrep One-Step Appl      1970.00   2.00
                                   Dressing Change Label            9.30   2.00
                                   Face Mask                       30.00   2.00
                                   Gauze Dressing, 2" x 2          44.20   8.00
                                   Gauze Dressing, 4" x 4",        88.40   8.00
                                   Isopropyl Alcohol Swabst        19.70   2.00
                                   Non-Adhering Dressing, 2        40.00   8.00
                                   Non-Adhering Split Dress        80.00   8.00
                                   Powder-Free Walleted Syn        25.00   2.00
                                   Roll Medical Tape               34.90   2.00
                                   Transparent Dressing            38.00   2.00
                                   Tray                            30.02   2.00
                                                                    0.00   0.00
                                               ===========  =======  =====  ===========  ===========  ===========
SUB TOTAL ---->                                   3647.52  2606.02  50.00     1020.00       150.01      2477.51
                                               ===========  =======  =====  ===========  ===========  ===========
64561         Transforaminal placement (10) Gauze Sponges, 4 x    44.00  10.00
                                   10cc Syringe, L/L                9.00   1.00
                                   Adson Dressing Forceps         189.00   1.00
                                   Fenestrated OR Towel            25.00   5.00
                                   Medicine Cups, 2 oz.            10.10   1.00
                                   Needle, 27ga x 1 1/4             4.99   1.00
                                   Tray                            80.00   1.00
                                   Webster Needle Holder           20.50   2.00
                                                                    0.00   0.00
                                               ===========  =======  =====  ===========  ===========  ===========
SUB TOTAL ---->                                    501.00   382.59  22.00      400.01        10.00        90.99
                                               ===========  =======  =====  ===========  ===========  ===========
CODEC         EVENT TESTING        tray                          120.00  24.00
                                                                    0.00   0.00
                                               ===========  =======  =====  ===========  ===========  ===========
SUB TOTAL ---->                                   8008.00   120.00  24.00      723.00         0.00      7285.00
                                               ===========  =======  =====  ===========  ===========  ===========
                                               ===========  =======  =====  ===========  ===========  ===========
GRAND TOTAL--->                                  12156.52  3108.61  96.00     2143.01       160.01      9853.50
```

Charge & Billing Features

Management Reports: Benchmarking

➢ Add the list of supplies & their cost to **Utility → Procedure → Supply** screen based on <Panel Code> for each provider.

Add Supply

Provider Code: MXS   Name: MICHAEL SCOTT M.D.   From Date: 01/01/2016   To Date: ____

CMD	Panel Code	CPT	▼ Supply	Quantity	Cost	From Date	To Date
	36556	36556	CSR Wrap	1	98.25	01/01/2016	12/31/2016
	36556	36556	ChloraPrep One-S...	1	985.00	01/01/2016	12/31/2016
	36556	36556	Dressing Change ...	1	9.15	01/01/2016	12/31/2016
	36556	36556	Face Mask	1	15.00	01/01/2016	12/31/2016
	36556	36556	Gauze Dressing, ...	4	22.10	01/01/2016	12/31/2016
	36556	36556	Gauze Dressing, ...	4	44.20	01/01/2016	12/31/2016
	36556	36556	Isopropyl Alcohol ...	1	9.85	01/01/2016	12/31/2016
	36556	36556	Non-Adhering Dre...	4	20.00	01/01/2016	12/31/2016
	36556	36556	Non-Adhering Spli...	4	40.00	01/01/2016	12/31/2016
	36556	36556	Powder-Free Wall...	1	12.50	01/01/2016	12/31/2016
	36556	36556	Roll Medical Tape	1	17.45	01/01/2016	12/31/2016
	36556	36556	Transparent Dres...	1	19.00	01/01/2016	12/31/2016
	36556	36556	Tray	1	15.01	01/01/2016	12/31/2206

Charge & Billing Features

Management Reports: Email reports with Financial Information

➢ To meet HIPAA requirements, documents will be emailed as an encrypted PDF attachment and a separate email will be send with the password to open the file.

➢ Standard email message with attachment:
  'We have attached a report for your review; the information in the report has been encrypted. The password to open the attachment will be send in a separate email.'

➢ Exact text for customized message should be emailed to support@primeclinical.com.

  NOTE: Email configuration will need to be set up in Intellect.
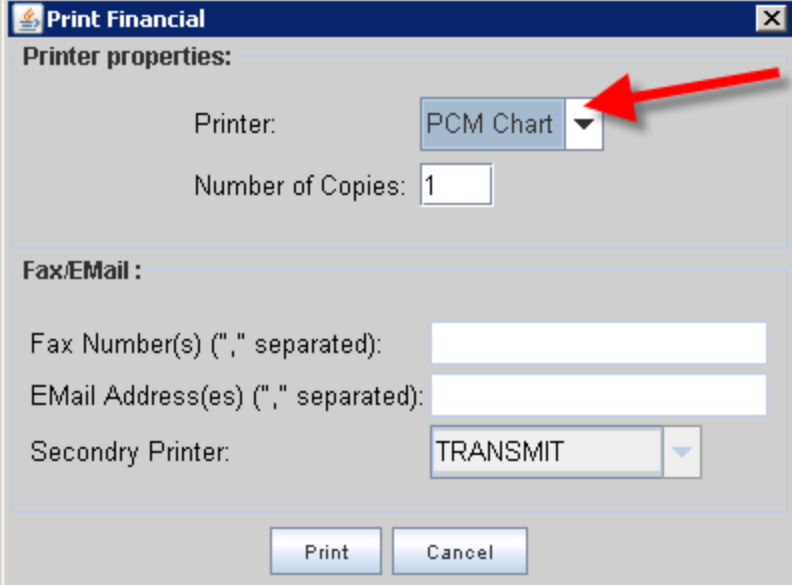
Management Reports: Export to PCM

For PCM users only —Export Intellect Reports to PCM

➢ Any Intellect report may be exported to PCM for storage.

➢ Exported in PDF format.

➢ Set up is needed to use this feature:

 ▪ Printer setup for **PCM Chart**

 ▪ Add account in Intellect with <Last Name> set to '**INTELLECT_REPORTS'**.

 ▪ Create chart in PCM.

➢ Effective version 16.02.22:

 ▪ NEW <Save as Chart> option for any print

 ▪ Prints hardcopy **AND** save to chart.

Generate Report in Intellect & select Printer '**PCM Chart**'.

PDF file will be saved to PCM chart with last name '**INTELLECT_REPORTS**'.

Print Financial

Printer properties:

Printer: PCM Chart

Number of Copies: 1

Fax/EMail :

Fax Number(s) ("," separated):

EMail Address(es) ("," separated):

Secondry Printer: TRANSMIT

Print   Cancel

Management Reports: Export to PCM *(continued)*

➢ Exports to PCM chart for **INTELLECT_REPORTS**.
➢ Reports filed under chart tab '**Int_rpt**'.
➢ **Doc Date** defaults to date the report was generated.
➢ **Doc Type** defaults to Intellect report name.

Management Reports: Cover Page

➢ **NEW OPTION: <First Page>** field on **Utility → Set Up → Printer → Report Setup** allows user to determine whether or not cover page with report criteria will print for each type of report.

- ▪ <Printer Class> is usually **HP**
- ▪ If <First Page> is set to **'N'**, then the first page will NOT print.
- ▪ If <First Page> is left blank or set to **'Y'**, the first page WILL print.
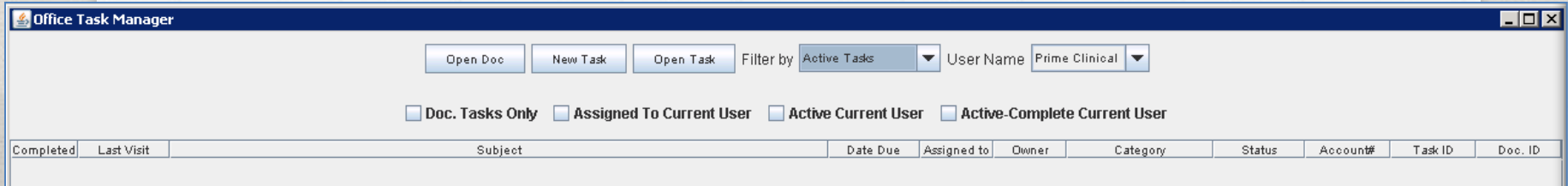
Modify REPORTS

Printer Class HP

CMD	▲ Report #	Description	Tray	CON.	LS.	FF.	LENGTH	WIDTH	CODE	PRI.	COPY	Duplex	Where	Printer Type	First Page
	RECEIPT_PA...	RECEIPT_PAYME...	T0		null		62	80					S	pcl	N
	RECEIPT_FA...	RECEIPT_FACILITY	T0		null		62	80					S	pcl	Y
	RECEIPT_CO...	RECEIPT_COLLEC...	T0		IO		60	80					S	pcl	Y
	RECEIPT RE...	Receipt Report	T1	cfa	nf		70	170					S	pcl	Y

OFFICE TASK MANAGER

> **Office Task Manager**   *(Effective version 16.05.20)*
> - Icon flashes yellow on task due date or reminder date.
> - Access items from PCM Task Manager within Intellect.
> - Manage 'To-Do' list not associated with patient charts.
> - *Minimal setup required in Intellect for users to view PCM tasks.*

- View list of tasks using Filters, User Name & check boxes.
- Add New Task
- Open Task

For PCM Users: *Tasks for eRx & Meaningful Use functions can only be performed through PCM.*

NEW FEATURE

OFFICE TASK MANAGER

➢ **Utility → Set Up → Appointment → Appointment Type <Add Task>:** Set *Office Task Manager* to appear automatically when scheduling appointment
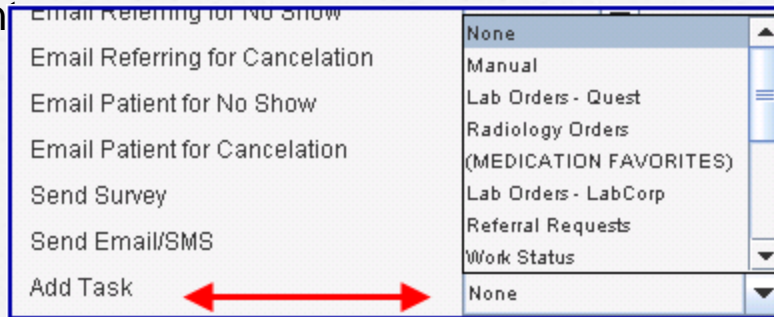
- **None:** disables feature when using Patient Self Check-In.

- **Manual:** Automatically display *Office Task* screen for new task when *Add Appointment* screen closed. Defaults <Notes> to appointment type specific message or <Comments> for scheduled appointment.

- *For PCM users only:* Automatically assign tasks from PCM Treatment Plans.

Features Available on 16.10.11 Release

➤ **Calls through Twilio:** Messages may now include <Co Payment> and <Deductible Met> amounts from patient's insurance screen.

➤ **Electronic Billing Reports to Email:** New option to receive Electronic Billing Report printouts via email.

➤ **Automated Tasks:** New option to allow start times to be set for EACH task.

C	TaskName	Type	Priority	Par	S...	Time	Description	
	TASK_AUTOPAYMENT	Daily	0	☐	☐		AUTO_PAY...	▲
	TASK_AGING	Daily	10	☐	☐	12:00 AM	AGING	
	TASK_APP_REMINDER	Year	10	☑	☐	02:00 PM	APPOINTME...	
	TASK_ANALYSIS	Daily	16	☑	☐	12:00 AM	ANALYSIS	▤
	TASK_STATEMENT1	Daily	61	☐	☐	12:00 AM	Group Of Pa...	
	TASK_APP_DAILY_LIST_X	Daily	62	☑	☐		PRINT APP...	▼

➤ **HIE Request:** *For PCM users only.* New Context Menu option on Full Day Schedule allows Intellect to query the hospital database via HIE communication to pull information for a given patient, display the report information, and save the file to PCM inbox.

How do _you_ stay up-to-date on the latest features in Intellect?

Logout

Training Plans	Meaningful Use Tools	OnSTAFF/Intellect Info	PCM Info	PRIME INFO	User Clinics

Training Plans
- Training Summary
- New Client Intellect & PCM
- Upgrading Clients
- Work Comp Intellect & PCM
- Continuing Education

OnSTAFF/Intellect Info
- Intellect Video Tutorials
- Documentation
- ICD-10
- INT Noridian Setup
- UNIX Noridian Setup
- Intellect FAQs

➢ **Client Login for www.primeclinical.com**

➢ **Intellect Webinars:** *(Training Plans → Continuing Education)*
- ✓ Live Webinars
- ✓ Recorded Webinars
- ✓ Calendar for Upcoming Webinars

➢ **Intellect Video Tutorials**

➢ **Help Menu options:** *(OnSTAFF/Intellect Info → Documentation on website.)*
- ✓ Online Documentation
- ✓ News (for Newsletters & Client Emails)
- ✓ Release Notes

➢ **Attend a User Meeting**

Guest Speaker

Krissy Balch, *Director of Revenue Cycle*

Prime Billing Services, LLC

Time for Questions!

Thank you for attending our 2016 User Meeting – Intellect Presentation!

Your feedback is important to making our User Meeting successful, please take a few minutes to complete the survey and kindly drop them at the registration table located in the Lobby.