

2016 User Meeting Intellect Presentation



Presented by
Celeste Seibert, *Project Manager*

Topics Covered

- **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**

Topics Covered

➤ **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

Appointment Schedule

Day Week Month Search Appointment List Survey List Surgery List Check In/Out Graphs

Wed February 10, 2016

CANTRELL(1) Wed Feb 10, 16				CARRINGTON(CARR) Wed Feb 10, 16			
Time	Type	Patient	N	Time	Type	Patient	N
09:00	F/U	AMJADI JR, HAMID	1	08:00	OPEN		
09:15	OPEN			09:30	OPEN		
09:30	OPEN			11:00	OPEN		
09:45	OPEN			12:30	OPEN		
10:00	F/U	MILLER, JR, TOM		02:00	OPEN		
10:15	OPEN			03:30	OPEN		
10:30	OPEN			05:00	OPEN		
10:45	OPEN						
11:00	OPEN						
11:15	OPEN						
11:30	F/U	BOZO, NANCY					
11:45	OPEN						
12:00	LUNCH						
12:15	LUNCH						
12:30	LUNCH						
12:45	LUNCH						
01:00	OPEN						
01:15	OPEN						
01:30	OPEN						
01:45	OPEN						
02:00	OPEN						
02:15	OPEN						
02:30	OPEN						
02:45	OPEN						
03:00	OPEN						
03:15	OPEN						
03:30	OPEN						
03:45	OPEN						
04:00	OPEN						
04:15	OPEN						
04:30	OPEN						
04:45	OPEN						
05:00	OPEN						
05:30	OPEN						

Add
 Modify
 Copy
 Cut
 Paste
 Reschedule
 Postpone
 No Show
 Delete
 Cancel
 Inquire
 Search
 Eligibility ▶ Selected Patient
 Message ▶ Doctor's Appointments
 Print... ▶ Day's Appointments
 RX... ▶
 Export... ▶
 Waiting List
 Receipt

Eligibility Verification

May be run for:

- A Single Patient
- A Specific Doctor's Appointments
- Entire day's appointments

Clearinghouses:
 OptumInsight
 TriZetto
 Zirmed
 Change Healthcare
 Ability

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** .

The screenshot shows a software interface for an appointment schedule. At the top, there is a tab labeled 'Appointment Schedule' and several navigation buttons: 'Day', 'Week', 'Month', 'Search', 'Appointment List', 'Survey List', 'Surgery List', 'Check In/Out', and 'Graphs'. Below these is a date selector showing 'Wed February 10, 2...'. The main area is a table with columns: Patient Name, Pr..., Time, Len..., Fa..., Confirmation, DOB, Patient Ph..., Cell Phone, Insurance, Ver. Stat, Phone, Subscrib..., C..., Ded., and Com... The table contains three rows of data. The 'Ver. Stat' column for the second row is highlighted in green and contains the date '02/10/16'. A context menu is open over the 'Inquire' option, with a red arrow pointing to it. The menu items are: Inquire, Print..., RX..., Export..., Receipt, Post Charges, and Post Super Bill.

Patient Name	Pr...	Time	Len...	Fa...	Confirmation	DOB	Patient Ph...	Cell Phone	Insurance	Ver. Stat	Phone	Subscrib...	C...	Ded.	Com...
AMJADI JR, HAMID	1	09:00 AM	15	O	Left Message	04/26/...	(626)		AETNA	02/10/16	(800) ...	W15768...	25	0	
MILLER, JR, TOM	1	10:00 AM	15	O	Confirmed	02/06/...	(124)		AETNA		(800) ...	4524654...	20	150	
BOZO, NANCY	1	11:30 AM	15	O		01/01/...	(626)		CAP TEST INSURA...			8746546...	0	0	

Schedule & Registration Features

Eligibility History screen

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

Appointment

Inquire Appointment

Name: Brown, David
Patient Id: 43457
Type: OPEN
Length: 15
Facility: DOWNEY OFFICE-87
Billing Provider: SMITH(1)
Comments:
Earlier Appt: N
Confirmation:

Eligibility History

DOS	Insurance	Subscriber	From	To	Co-Pay	Ded
07/22/10	AETNA INC	W1576872...	09/01/09		15	0
07/13/10	AETNA INC	W1576872...	09/01/09		15	0

Details:

Message	Remark	Amt / %
Health Benefit Plan Coverage Us...	Med Dent	500
Health Benefit Plan Coverage Us...	Med Dent	250
Health Benefit Plan Coverage Us...	IND COINS LMT	3000
Health Benefit Plan Coverage Us...	IND COINS LMT	3000
Health Benefit Plan Coverage Us...	FAM COINS LMT	6000
Health Benefit Plan Coverage Us...	FAM COINS LMT	6000
Health Benefit Plan Coverage Us...		500
Point of Service (POS) Health Ben...	PCP SELECTION NOT REQUIR...	0.0
Other Source of Data		0.0
Point of Service (POS) Health Ben...		0.0
Health Benefit Plan Coverage Us...		250
Health Benefit Plan Coverage Us...	MEDICAL MAX	5000000
Health Benefit Plan Coverage Us...	MEDICAL MAX	499411...
Health Benefit Plan Coverage Us...	Med Dent	250
Health Benefit Plan Coverage Us...	DEDUCTIBLE \$\$ MET	0
Health Benefit Plan Coverage Us...	IND COINS LMT	6000
Health Benefit Plan Coverage Us...	IND COINS LMT	6000

Appointment History:

Provider	Time	Date	Status	Type	Date Sch...	Who S...	Length	Comment	Date Chng	Who Chng
1	08:00 AM	08/09/10	Added	OPEN	08/09/10	2	15			
1	11:00 AM	08/09/10	Added	OPEN	08/09/10	2	15			
1	08:00 AM	07/26/10	Added	OPEN	07/26/10	2	15			

Buttons: Eligibility, Compose RX, Data Entry, RX Status, Exit

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

Schedule & Registration Features

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.

Schedule & Registration Features

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:



Have you ever been in this office before?



I couldn't find your information in our system

Please enter following 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:

Schedule & Registration Features

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?



Please Slide Your Credit Card

Card No:

Name On Card:

Expiration Date:

CoPayment Due:

Balance Due:

Balance Payment:

Schedule & Registration Features

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

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

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 Cancellation	WC Cancelled ▼
Email Patient for No Show	Patient No Show ▼
Email Patient for Cancellation	Patient Cancelled ▼
Send Email/SMS	Yes ▼

Patient Letter for NoShow

Patient Letter for Cancellation

Emails To Referring

Emails to Patient

Schedule & Registration Features

No Show & Cancellation Emails

Based on Appointment Types

➤ Fields on **Appointment Type** screen:

- Email Referring for NoShow
- Email Referring for Cancellation

- Email Patient for NoShow
- Email Patient for Cancellation

To Referring

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*

Schedule & Registration Features

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 you 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

Schedule & Registration Features

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

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



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](#)

Scheduling & Registration Features

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

Scheduling & Registration Features

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!

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

Appointment Schedule

Day Week Month Search Appointment List Survey List Surgery List Check In/Out Graphs

Wed February 10, 2016

CANTRELL(1) Wed Feb 10, 16				CARRINGTON(CARR) Wed Feb 10, 16				BELKIN(24) Wed Feb 10, 16			
Time	Type	Patient	N	Time	Type	Patient	N	Time	Type	Patient	N
09:00 AM	F/U	AMJADI JR, HAMID	1	08:00 AM	OPEN			09:00 AM	OPEN		
09:15 AM	OPEN			09:30 AM	OPEN			09:15 AM	OPEN		
09:30 AM	OPEN			11:00 AM	OPEN			09:30 AM	OPEN		
09:45 AM	OPEN			12:30 PM	OPEN			09:45 AM	OPEN		
10:00 AM	F/U	MILLER, JR, TOM	1	02:00 PM	OPEN						
10:15 AM	OPEN			03:30 PM	OPEN						
10:30 AM	OPEN			05:00 PM	OPEN						
10:45 AM	OPEN										
11:00 AM	OPEN										
11:15 AM	OPEN										
11:30 AM	F/U	BOZO, NANCY	1								
11:45 AM	OPEN										
12:00 PM	LUNCH										
12:15 PM	LUNCH										
12:30 PM	LUNCH										
12:45 PM	LUNCH										
01:00 PM	OPEN										
01:15 PM	OPEN										
01:30 PM	OPEN										
01:45 PM	OPEN										
02:00 PM	OPEN							02:00 PM	OPEN		
02:15 PM	OPEN							02:15 PM	OPEN		
02:30 PM	OPEN							02:30 PM	OPEN		
02:45 PM	OPEN							02:45 PM	OPEN		
03:00 PM	OPEN							03:00 PM	OPEN		
03:15 PM	OPEN							03:15 PM	OPEN		
03:30 PM	OPEN							03:30 PM	OPEN		
03:45 PM	OPEN							03:45 PM	OPEN		
04:00 PM	OPEN							04:00 PM	OPEN		
04:15 PM	OPEN							04:15 PM	OPEN		
04:30 PM	OPEN							04:30 PM	OPEN		
04:45 PM	OPEN							04:45 PM	OPEN		
05:00 PM	OPEN							05:00 PM	OPEN		
05:30 PM	OPEN							05:30 PM	OPEN		

Right click & select Message:

- Select Patient
- Doctor's Appointments
- Day's Appointments

Schedule & Registration Features

Messaging Feature: *Patient Alert*

Select Email, Text Message OR Phone Call for the custom message.

The screenshot shows a 'Patient Alert' form with the following fields and options:

- 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 []
- 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]

Callout boxes provide additional information:

- '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 all phone call recordings.

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)

Send News Letter

Date From: 01/01/2015
To Date: 12/31/2015
DOB From:
DOB To:
Age From:
Age To:
Day Of Birth:
Month Of Birth:
ZipCode:
Gender:
Employer Code:
Facility Code:
Category:
Insurance Code:
Referring Code:
Treating Provider:
Billing Provider:
CPT Code:
Diagnosis Code:
Insurance Category:
Send To: Patient
Voice Message: Text
File Name:
Subject:
Message: Please join us on Saturday 2/7/2016 from 9am to 4pm for our flu shot clinic. We also have other screenings and services available such as Bone Density, Physical Therapy, Blood Pressure and more.

<< BACK NEXT >> Send Clear Exit

Example: Text to Voice Message.

Send to Patient, Guarantor or Guardian

Send News Letter

Date From: 01/01/2015
To Date: 12/31/2015
DOB From: //
DOB To:
Age From:
Age To:
Day Of Birth:
Month Of Birth: January
ZipCode:
Gender:
Employer Code:
Facility Code:
Category:
Insurance Code:
Referring Code:
Treating Provider:
Billing Provider:
CPT Code:
Diagnosis Code:
Insurance Category:
Send To: Patient
Voice Message: Happy Birthday
File Name:
Subject:
Message:

<< BACK NEXT >> Send Clear Exit

Example: Pre-Recorded Voice Message.

Either send a pre-recorded Voice Message OR Text to Voice Message.
Requires Twilio!

Schedule & Registration Features

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

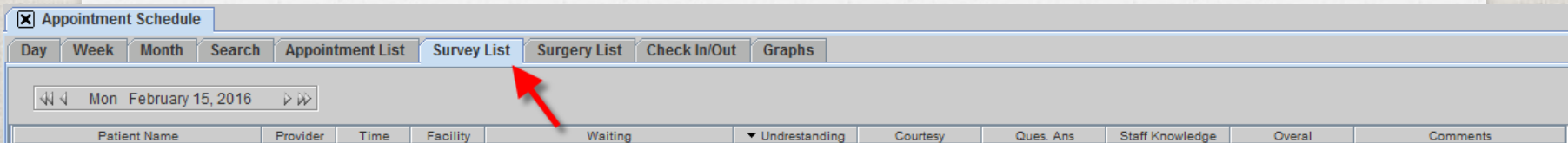


Select the **Call Status** icon and review the status of:
Appointment Reminders, Recalls, Aging Report & Newsletter Calls.

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.

Schedule & Registration Features

Sample: Email & Survey

Dr. John Doe MD

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



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

Schedule & Registration Features

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.

A screenshot of a software menu with three main tabs: 'Registration', 'Charges', and 'Payment'. Under the 'Registration' tab, there are several options: 'Regular', 'Worker', 'Labels', 'Registration', 'Authorization', 'Doc. Archive', 'Patient ID Card', 'Voice Recorder', and 'Credit Card'. The 'Credit Card' option is selected, and a sub-menu is open showing 'Add', 'Modify', 'Delete', 'View', and 'Search'.

A screenshot of a web form titled 'Add CREDIT_CARD'. The form contains the following fields and values:

Patient Account No	1006
Credit Card Number	*****5787
Expiration Date	02/01/2018
First Name On The Card	FIRSTNAME
Last Name On The Card	LASTNAME
Address	BILLING ADDRESS
Zip Code	91205
City	GLENDALE
State	CA

At the bottom of the form, there are five buttons: '<< BACK', 'NEXT >>', 'Add', 'Clear', and 'Exit'.

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

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

Scheduling & Registration Features

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.

The image shows a sample medical statement form titled "STATEMENT" and "PAGE: 1". The date is 04/11/2016. The sender is Prime Clinical Systems, 3675 E. Huntington Dr., Pasadena, CA, 91107, (626) 449-1705. The patient is SMITH, JOHN H, 6932 FORREST DR, LOS ANGELES, CA 90017. The insurance is BCCA1, 71907. The form includes fields for "CHECK ONE: AMOUNT APPLIED", "SECURITY CODE", "CARD EXPIRATION DATE", and "DATE SIGNED". A callout box points to the patient portal information: "Sample clinic website/email address and password for patient online payments." The payment instructions at the bottom are: "To pay online go to www.primeclinical.com Your password is: gw8dhl2r46".

NOTE: For these options, the credit card payment is processed immediately, but the payments will need to be posted 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

OnSTAFF Intellect 15.10.15 Clinic No: 1 Clinic Name: TRAINING DATABASE Clinic Date: 12/01/2015 OprNo: 15 BillMethod: D

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

Appointment Schedule

Day Week Month Search Appointment List Survey List Surgery List Check In/Out Graphs

Tue April 12, 2016

Patient Name	Provider	Time	Length	Facility	Confirmation	DOB	Patient Phone	Cell Phone	Insurance	Ver. Stat	Phone	Subscriber #	CoPay	Ded.	Comment
BLANK, NAME	1	09:15 AM	15	O	Confirmed	05/21/1955	(843) 543-9994								APPT COMMENT
ANESTHESIA, PATIENT	1	09:30 AM	45	O	Cancelled	02/05/185			MEDICARE		(866) 931...	465432132434	0	0	
SMITH, JANET	1	10:15 AM	15	NMC	Left Message	12/12/197			ACTORS GUILD		(818) 954...	999999999			WC PT
DOE, PAUL	1	10:30 AM	15	O	Rescheduled	07/19/198									
DOE, JANE	1	10:45 AM	15	O	No Answer	12/31/198			OSS/SHIELD ...			XMJ24154326188	5	100	

Inquire
Print...
RX...
Export...
Receipt
Post Charges
Post Super Bill

Registration
SuperBill
Patient's Appointments
Patient's Instruction
Label
Doctor's Appointments

- **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

Appointment - Modify Appointment

Patient Info | Insurance Info | Eligibility History | Notes | **Surgery**

Name: ADAMS, ARTHUR
 Patient Id: 1003
 Type: SURG
 Length: 120
 Facility: Pasadena Medica-O
 Billing Provider: BING MD(BING)
 Comments:
 Earlier Appt: N
 Confirmation:

Status: Updated By: Admission:
 Patient: Pre Op: Res:
 H&P: Lab: Auth No:
 Auth: Ins: P1: AETNA
 Clrnc: Message:
 Note:

Diagnosis

Code	Description

Procedure

Code	Description	Qty	Modifier

Save Pre-Operation Appointment Print **Post**

Appointment History:

Provider	Time	Date	Status	Type	Date Sch...	Who S...	Length	Comment	Date Chng	Who Chng
BING	08:00 AM	02/17/16	Added	SURG	02/17/16	100	120			
BING	10:00 AM	11/11/15	Added	SURG	11/11/15	100	120			
MXS	03:15 PM	09/25/15	Added	BOTOX	09/25/15	100	15			
MXS	02:00 PM	09/11/15	Added	BOTOX	09/11/15	100	15			
MXS	02:00 PM	08/28/15	Added	BOTOX	08/28/15	100	15			
BING	09:15 AM	08/20/15	Added	FU	08/20/15	100	15	comments		
BING	09:00 AM	08/17/15	Added	FU	08/17/15	100	15			

Modify Modify Patient Exit

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

The screenshot displays the 'Appointment Schedule' window with the 'Surgery List' tab selected. A red arrow points to the 'Surgery List' tab. Below the tab, a date navigation bar shows 'Tue April 12, 2016'. A table lists appointment details for two patients: JONES, TOMMY X and SMITH, LARRY M. A context menu is open over the first row, listing options: Inquire, Print..., RX..., Export..., Receipt, Post Charges, and Post Super Bill. The 'Print...' option is expanded to show sub-options: Registration, SuperBill, Patient's Appointments, Patient's Instruction, Label, and Doctor's Appointments.

Patient Name	Sex	DOB	Dr.	Time	Length	Facility	H-Phone	C-Phone	Diagnosis	Procedure	Note
JONES, TOMMY X		02/14/2016	1	03:00 PM	60	PHYSICIA...	(555) 555-5...		K429 UMBILICAL HERNIA WITHOUT ...	49585 UMBILICAL HERNIA REP	
SMITH, LARRY M	M	01/23/1988	1	01:00 PM	120	ST JOSEP	(805) 433-7...		K353 ACUTE APPENDICITIS WITH L...	44950 APPENDECTOMY	

- Inquire
- Print...
 - Registration
 - SuperBill
 - Patient's Appointments
 - Patient's Instruction
 - Label
 - Doctor's Appointments
- RX...
- Export...
- Receipt
- Post Charges
- Post Super Bill



Time for Questions!

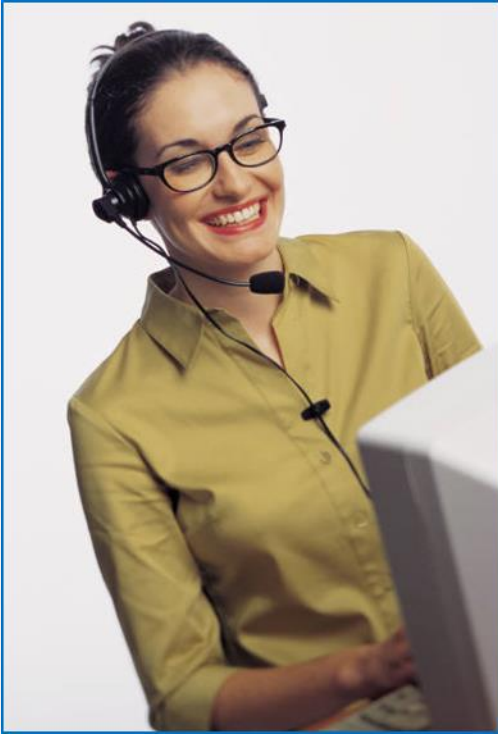


Guest Speaker

Medicare



15 Minute Break



Charges & Billing Features

Charge & 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

Appointment Schedule

Day Week Month Search Appointment List Survey List Surgery List Check In/Out Graphs

Tue April 12, 2016

Patient Name	Pro...	▲ Ti...	Le...	Fa...	Confirmati...	DOB	Patient Phone	Cell Phone	Insurance	Ver. Stat	Phone	Subscriber #	Co...	Ded.	Comment
BLANK, NAME	1	09:...	15	O	Confirm...	05/21/1...	(843) 543-...								APPT COMME...
ANESTHESIA, PATI...	1	09:...	45	O	Canceled	02/05/1...	(626) 456-...		MEDICARE		(866) ...	4654321324...	0	0	
SMITH, JANET	1	10:...	15	N...	Left Mes...	12/12/1...	(408) 965-...	(555) 555-...	SCREEN ACTORS G...		(818) ...	999999999			WC PT
DOE, PAUL	1	10:...	15	O	Resche...	07/19/1...	(818) 449-...								
DOE, JANE	1	10:...	15	O	No Ans...	12/31/1...	(201) 555-...		BLUE CROSS/SHIEL...			XMJ2415432...	5	100	
SMITH, LARRY M	1	01:...	120	S...		01/23/1...	(805) 433-...		AETNA		(800) ...	555555555	30		SURGICAL PR...
JONES, TOMMY X	1	03:...	60	O			(555) 555-...		MEDI-CAL			1545678787	0	0	

- Inquire
- Print... ▶
- RX... ▶
- Export... ▶
- Receipt
- Post Charges
- Post Super Bill

Schedule & Registration Features

Post Super Bill screen

Superbill Post

Demographics...

Account: 1 Name: FIRST, FIRST M DOB: 09/13/1935 Category: HMO
Insurance: 1 Ins. Name: AETNA CASUALTY Who: P1 Copay: 15 EN#: Encounter Desc.:

Diagnosis Procedure

Change responsible party.

Select Encounter# from drop down.

Office Charges

<input type="checkbox"/> 99202 NP EXPANDED	D	M
<input type="checkbox"/> 99203 NP DETAILED	D	M
<input type="checkbox"/> 99204 99204 - TEST THE PROCEDURE DESCRIPTION	D	M
<input type="checkbox"/> 99205 HOSPITAL VISIT	D	M
<input type="checkbox"/> 99211 OFFICE/OUTPATIENT VISIT, EST - OFFICE/OUTPATIENT VISIT,	D	M
<input type="checkbox"/> 99212 OFFICE VISIT, EST PT 1/1 - OFFICE VISIT, EST PT 1/1 - OFFICE VISIT, EST PT 1/1	D	M
<input type="checkbox"/> 99213 OFFICE VISIT PT, COMPLEX	D	M
<input type="checkbox"/> 99214 OV EXTENDED	D	M
<input type="checkbox"/> 99215 OV EXTENDED	D	M
<input type="checkbox"/> 99243 LEVEL 3 OV	D	M
<input type="checkbox"/> 99244 Consultation,level4 - CONSULTATION, LEVEL4	D	M

Procedure

<input type="checkbox"/> 93000 EKG	D	M
<input type="checkbox"/> 94640 NEBULIZER	D	M

Laboratory

<input type="checkbox"/> 81002 URINE DIPSTICK	D	M
---	---	---

Injections

<input type="checkbox"/> J1000 J1000-Description	D	M
<input type="checkbox"/> J1060 J1060-Description	D	M
<input type="checkbox"/> G0008 ADMINISTRATION OF INFLUENZA VIRUS VACCINE	D	M
<input type="checkbox"/> 90732 PNEUMOVAX	D	M
<input type="checkbox"/> J0696 ROCEPHIN	D	M
<input type="checkbox"/> 90718 ADULT TD - ADULT TD - ADMIN FEE	D	M
<input type="checkbox"/> J1885 J1885-Description	D	M
<input type="checkbox"/> 86580 PPD	D	M
<input type="text"/> Extra1	D	M
<input type="text"/> Extra2	D	M
<input type="text"/> Other	D	M

Superbill based on Appointment Provider or Appointment Type.

#1: Check boxes to select from **Diagnosis** list. Blank boxes allow entry of unlisted codes.

#2: Check boxes to select from **Procedure** list then press 'D' to select related diagnosis code. Press 'M' to select modifier(s).

Bill UB0

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 Copay**, Deductible and/or Co-insurance amounts.

C	Date/L#	Dr	Description	Code	Mod	RDX	ASI	Who	Qty	Charge	Payment	Adjustment
1			LOW BACK PAIN	M545								
	01/31/2016	13	COMPLEX HI COMPLEX	99214		1	Y	P1	1	178.00	0.00	0.00

- Modify
- Delete
- Information
- Bill Copay/Deductible**
- Charge
- Remark
- Medication
- Diagnosis
- Tax
- Commit All
- Commit Charge
- Scrub
- Cancel

Expected Co-Pay:

Expected Deductible:

Expected Co-Insurance:

OK Cancel

Co-Pay 5.00 Deductible 100.00 Patient Portion 0.00 Total Charge 178.00 Total Payment 0.00 Total Adjustment 0.00

Add Options: Resume Charge Remark Medication Diagnosis Tax Post Options: Commit All Commit Charge Scrub Cancel Receipt Bill UB04

Charge & Billing Features

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.

02/15/2016 STATEMENT PAGE: 1

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

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

ACCOUNT NO: 1133
CATEGORY: PPO
INSURANCE: BCBSNJ

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

CHECK ONE: <input type="checkbox"/> VISA <input type="checkbox"/> MC	AMOUNT APPLIED TO CREDIT CARD	CREDIT CARD NUMBER
PRINT CARDHOLDER NAME	CARD EXPIRATION DATE	
CARDHOLDER SIGNATURE (X)	DATE SIGNED / /	

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.

C	DOS	Prov.	Description	EN#	POS	Mess...	Code	Mod.	RDX	ASI	...	Rdr.	Charge	Payment	Ded...	Adjustment	Balance	Oper...	R
			ABDOMINAL PAIN				789.00												
	05/08/2014	1	INITIAL OV/GYN		O		99204		1	Y	P1		181.50		0.00		181.50	15	N
			ABDOMINAL PAIN				789.00												
	10/02/2014	13	INFANT (UNDER 1 YR)		O		99381		1	Y	P1	SMICH	137.50		0.00		137.50	15	N
			LOW BACK PAIN				M545												
	01/31/2016	13	COMPLEX HI COMPLE		O		99214		1	Y	P1	SMICH	178.00		0.00		178.00	15	N

- Modify
- Remark
- Payment History
- Start from The beginning
- Add Remark
- View Remark
- View CoPay/Deductible Due

Expected Co-Pay:

Expected Deductible:

Expected Co-Insurance:

Charge & Billing Features

Unpaid Copay/Deductible: Charges → Modify [Information]

ChargeModify

Account: 1133 Name: DOE, JANE Balance: 497.00 From: 01/31/2016 To: 01/31/2016

From Date	To Date	Conversion	Unit Value	Percent	Days Unit	Category*	Status	Cost	Billing Prv	Panel Code	Batch	revenue	SB	Apply To All*
01/31/2016	01/31/2016	0.00	0.00	100.00	1.00	PPO	C	0.00	13	99214	0		0	<input type="checkbox"/>
Billing Date*	Sec. Bill Date*	Payment Date	Time From	Time To	Pay Plan*	Primary*	Secondary*	Tertiary*	Who*	Copay Due	Deduct Due	Co-Ins Due	Approved	Save
					BCBSNJ				P1	5.00	0.00	0.00	178.00	<input type="button" value="Save"/>

C	Type	Date	Dr	Description	EN#	POS	Code	Mod.	RDY	ASL	Who	Pdr	Charge	Payment	Adjustment
D				LOW BACK PAIN			M545								
P		01/31/2016	13	COMPLEX HI COMPLEX	0	O	99214		1	Y	P1	SMICH	178.00	0.00	0.00

- Able to modify the Expected/Unpaid amounts AFTER charges posted.
- Unpaid amounts will appear on the patient Statement.

Add

Djagnosis

Remark

Modify

Apply Changes

Display

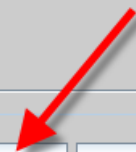
Information

Payment History

Options

Check RDX

Exit



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.

	De	Co	Wh	ADX	Who	Rate	Paym	Disc	Adjustm	
1										
09/15/2016	MXS	Unspecified abdominal pain	R109							
09/15/2016	MXS	EST PT EXPANDED VISIT	99213	1	Y	P1	1	180.00	0.00	0.00
09/15/2016	MXS	VENIPUNCTURE	36454	1	Y	P1	1	25.00	0.00	0.00
09/15/2016	MXS	COSMETIC PRODUCT	PRODUCT	1	Y	G	1	35.00	0.00	0.00
J		CLEANSER								
09/15/2016	MXS	COSMETIC PRODUCT	PRODUCT	1	Y	G	1	27.00	0.00	0.00
		SUNSCREEN SPF 100								

Press [J] to post the payment.

From Line: To Line:

Payment: Adjustment:

Method: Message:

%: Who:

Comment:

Co-Pay Deductible Total Adjustment

Add Options **Post Options**

Receipt
 Bill
 UB04

Charge & Billing Features

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

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	<input checked="" type="checkbox"/> Yes
webStaff Access	Y

<< BACK NEXT >> Modify Clear Exit

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

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

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

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

Public Info...

Batch	SB	ACN	Name	Category	Provider	Billing Prv	Ref Prv	Facility	EN#	Check#	Visit No.
0	0	1133	DOE, JANE	PPO	13	13	SMICH	0	0		

Diagnosis...

Code

Charge...

Panel	Dr	Billing Prv	From/Date	To	RDX	Insurance	Who	Code	Mod	ASI	QTY	Charge
						1: P1, BLUE CROSS/SHIELD OF NJ						

Please select the appropriate ICD10:

ICD10	Description
R200	Anesthesia of the skin
R201	Hypoesthesia of skin
R202	Paresthesia of skin
R203	Hyperesthesia
R208	Other disturbances of skin sensation

Exit Select ICD10 Select ICD9

Co-Pay Deductible Patient Portion Total Charge Total Payment Total Adjustment

Add Options **Post Options**

<input type="checkbox"/> Resume	<input type="checkbox"/> Charge	<input type="checkbox"/> Remark	<input type="checkbox"/> Medication	<input type="checkbox"/> Dagnosis	<input type="checkbox"/> Tax	<input type="checkbox"/> Commit All	<input type="checkbox"/> Commit Charge	<input type="checkbox"/> Scrub	<input type="checkbox"/> Cancel	<input type="checkbox"/> Receipt	<input type="checkbox"/> Bill	<input type="checkbox"/> UB04
---------------------------------	---------------------------------	---------------------------------	-------------------------------------	-----------------------------------	------------------------------	-------------------------------------	--	--------------------------------	---------------------------------	----------------------------------	-------------------------------	-------------------------------

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**

The screenshot shows a web browser window with a navigation bar at the top containing 'Contents', 'Index', 'Search', and 'Print' buttons. A search box is on the right. A left sidebar lists menu items: 'ICD-10 Resources', 'Preparing for ICD-10', 'ICD-10 Timeline', 'ICD-10 Video Tutorials', and 'ICD-10 Q & A'. The main content area is titled 'ICD-10 Resources' and includes a breadcrumb trail 'Home > ICD-10 Resources'. The text reads: 'Welcome to our ICD-10 education resource center!' followed by a section header 'Intellect & PCM Resources'. Below this, it states: '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.' A bulleted list follows: 'Intellect Video Tutorials', 'Prime Clinical Q & A (this also includes some information for PCM users)', and 'Standalone ICD-10 Lookup Program -- Released 06/2015'. Another section header 'Industry Resources' is present, with text: '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.'

Charge & Billing Features

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.

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 & Billing Features

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

Charge Review

Account	1041	Name	SMITH, MARY				
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 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
1012	test, patient	BING	BING	10/02/2015	99213		TEST PROC	CA		90.00	-90.00	0.00	0.00
		BING	BING	10/10/2015	99213		TEST PROC	CA		90.00	-60.00	0.00	30.00
										180.00	-150.00	0.00	30.00
1041	SMITH, MARY	BING	BING	09/01/2015	99214		EST PT OV	CA		0.00	0.00	0.00	0.00
		BING	BING	09/01/2015	26055		office visit	CA		0.00	0.00	0.00	0.00
		BING	BING	09/15/2015	99214		EST PT OV	CA		0.00	0.00	0.00	0.00
		BING	BING	09/15/2015	26055		office visit	CA		0.00	0.00	0.00	0.00
										0.00	0.00	0.00	0.00
1042	JOHNSON, ...	MXS	MXS	09/08/2015	99214		EST PT OV LEVEL 4	AET		0.00	0.00	0.00	0.00
		MXS	MXS	09/08/2015	26055		office visit	AET		0.00	0.00	0.00	0.00
										0.00	0.00	0.00	0.00
1045	BURNETT, J...	123	123	01/10/2016	44950		APPENDECTOMY	CIGN		2100.00	0.00	0.00	2100.00
		123	123	01/13/2016	99213		TEST PROCEDURE	PT CIGN		0.00	0.00	0.00	0.00

Transfer to:

- P1 Primary 1
- P1 Primary 1
- S1 Secondary 1
- T1 Tertiary 1
- P2 Primary 2
- S2 Secondary 2
- T2 Tertiary 2
- P3 Primary 3
- S3 Secondary 3

OK

Tag Options

Highlight Options

Charge & Billing Features

Charge Review *continued*

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
													340.00
													0.00
													30.00
													30.00
													0.00
													0.00
													0.00
													0.00
													0.00
													0.00
													0.00
													2100.00
													0.00

Charge Information X

Apply To All*	From Date	To Date	Category*	Facility	Referring Dr*	Billing Provider	Assignment*	Qty	Who*
<input type="checkbox"/>	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

Highlight Options

Charge & Billing Features

Charge Review *continued*

☒ 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	99213		Transfer to Insurance	P1	STAT	0.00	0.00	0.00	0.00
		BING	BING	10/02/2015	99213		Transfer to Patient	P1	STAT	150.00	0.00	0.00	150.00
		MXS	MXS	01/28/2016	99213		LEVEL 4	P1	STAT	100.00	0.00	0.00	100.00
		MXS	MXS	01/28/2016	26049		Put On Hold	P1	STAT	0.00	0.00	0.00	0.00
							Scrub			340.00	0.00	0.00	340.00
1008	DOE, FRED	MXS	MXS	09/01/2015	99213		LEVEL 4			0.00	0.00	0.00	0.00
		MXS	MXS	09/01/2015	26049		Submit Claim			0.00	0.00	0.00	0.00
							Print Claim			0.00	0.00	0.00	0.00
1012	test, patient	BING	BING	05/01/2015	99213		Print UB form			0.00	0.00	0.00	0.00
		BING	BING	10/02/2015	99213		CEASURE			0.00	0.00	0.00	0.00
		BING	BING	10/10/2015	99213		CEASURE			0.00	0.00	0.00	0.00
							Diagnosis			0.00	0.00	0.00	30.00
1023	DUCK, DON...	FAMILY	FAMILY	04/16/2015	99213		Charge Info			0.00	0.00	0.00	125.00
		BING	BING	05/01/2015	99213		Add Charge			0.00	0.00	0.00	85.00
							Claim Requirement			210.00	0.00	0.00	210.00
1041	SMITH, MARY	BING	BING	09/01/2015	99213		LEVEL 4	P1	BCCA	0.00	0.00	0.00	0.00
		BING	BING	09/01/2015	26049		Encounter	P1	BCCA	0.00	0.00	0.00	0.00
		BING	BING	09/15/2015	99213		Patient	P1	BCCA	0.00	0.00	0.00	0.00

Tag Options

Transfer to Insurance

Transfer to Patient

Highlight Options

Diagnosis

Charge Info

Claim Requirement

Encounter

Patient

Facility

Provider

Referring

Insurance

Scrub

CreateXML

Submit

Print Claim

Print UB Form

NEW option
only available in
Context menu.

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 identifies the electronic claims file will appear on reports from the clearinghouse & *Electronic Billing Report* generated when claims submitted.

Billing	Management
Insurance	▶
Statement	▶
Tele Com	▶
Follow Up	▶
Worker	▶
Company	▶
QSHPD	
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

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

Check: Report
Pay & Report

Print Bill: No

Provider Code:

Category Code:

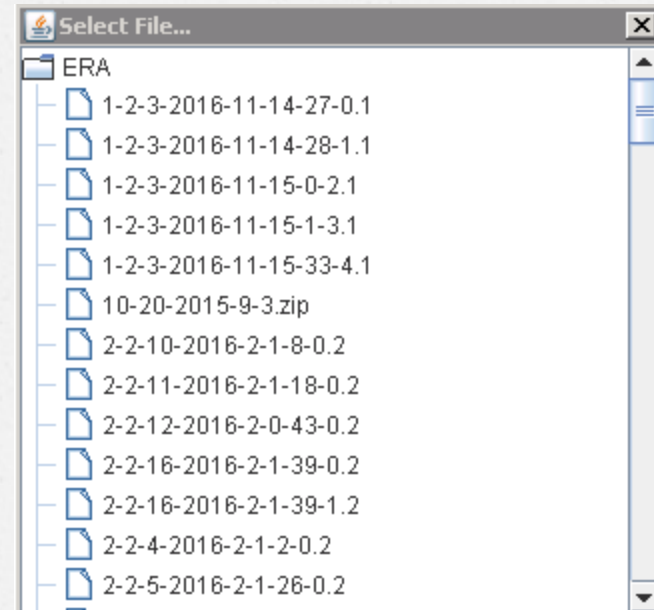
Batch No.: **UNIQUE # FOR EACH FILE**

Adjust Cross Over: No

Credit Card Payment: No


Primary/Sec/All: All

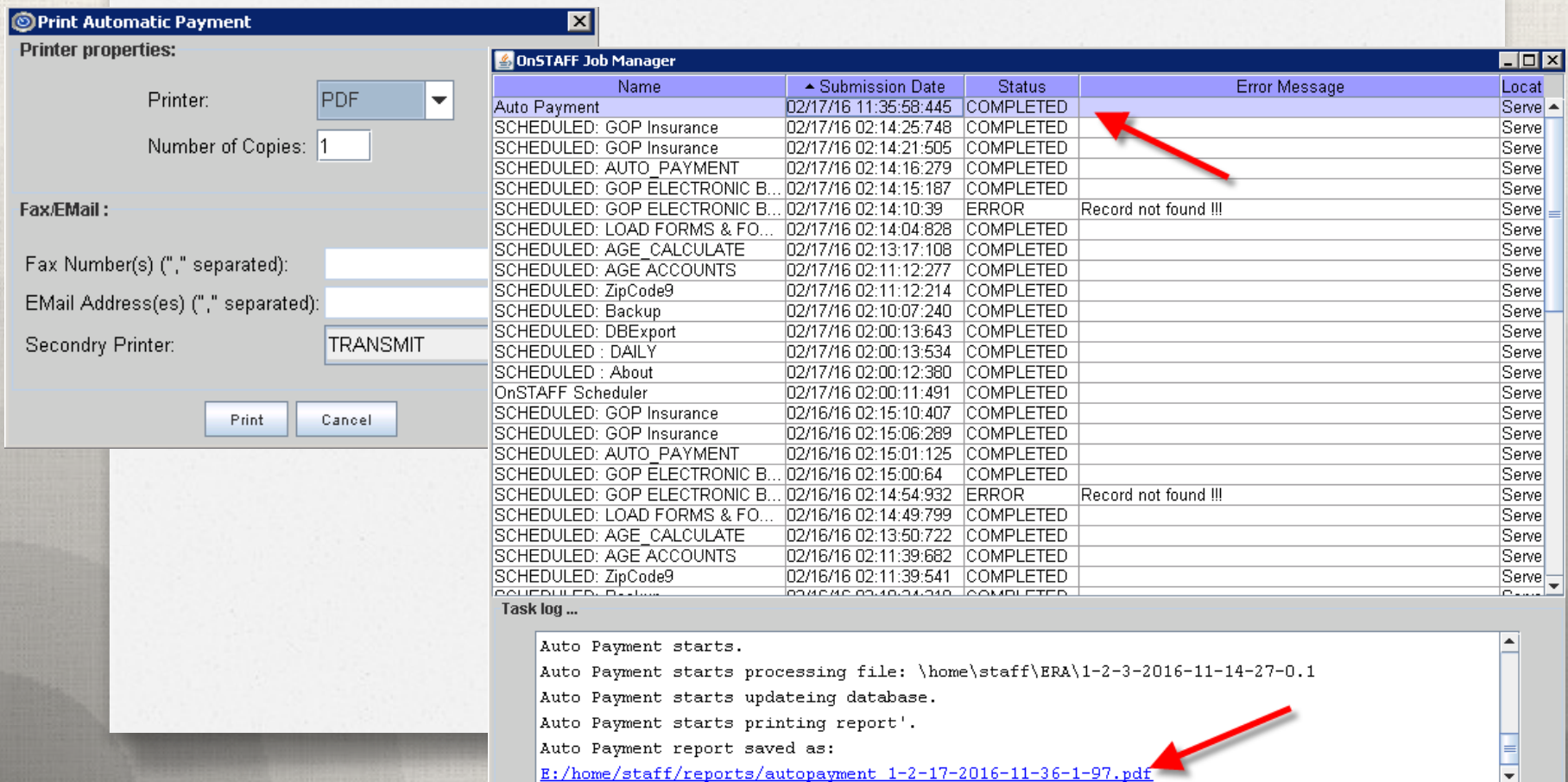
Press [F2] to display list of downloaded ERA files. Select filename to reprint or post ERA.



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* icon 
- Highlight print job then click on PDF file listed in Task Log to view.



The screenshot displays the 'Print Automatic Payment' dialog box and the 'OnSTAFF Job Manager' application window.

Print Automatic Payment Dialog:

- Printer: PDF
- Number of Copies: 1
- Fax/Email: (empty)
- Fax Number(s) ("," separated): (empty)
- Email Address(es) ("," separated): (empty)
- Secondary Printer: TRANSMIT
- Buttons: Print, Cancel

OnSTAFF Job Manager Table:

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 02:10:34.318	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

OpenItem
View WORKER

Account 1007 Name DOE, JANE D

Home (925)123-4567

DOB 08/01/1970

Primary STATE COMP INS FUND

Second

Pre A/R 0.00

Patient 150.00

Group1 150.00

Balance 823.50

Group1 363.50

C	DOS	Prov.	Description
	10/02/2015	MXS	EXAM
	10/02/2015		BLUE CROSS
	10/01/2016		WORKERS C
			Low back pai
	10/02/2015	BING	EST PT OV LF
	10/01/2016		WORKERS C
			Low back pai
	10/02/2015	MXS	EST PT EXPA
	10/02/2015	MXS	VENIPUNTUF
			Abdominal P?
	01/25/2016	BING	EST PT EXPA
	01/25/2016	BING	VENIPUNTUF
			Assault by pa
	01/28/2016	MXS	EST PT OV LF
	01/28/2016	MXS	TEST ADD'L C
			Pain in thorac
	08/08/2016	BING	EST PT EXPA
			Pain in thorac
			Varicose vein
	10/03/2016	BING	EST PT EXPAN...
	10/03/2016	BING	VENIPUNTURE

Patient's Account No. 1007

Last Name DOE

Prefix Miss

Address 1234 TEST LANE

City

Phone 1 (925)123-4567

Phone 2 (925) 333-2222

Emergency Contact JIM DOE

Fax (925) 333-2323

Gender (M/F/U) F

DOB 08/01/1970

Ethnicity

DL# N42343231

Acct#

Acct#

Acct#

Category

PTP Name

Hospital Name

Phone# (925) 111-4433

Warning YES

Remark
DOI 8/1/2013
RECORDS RECEIVED 12/10/2014

Chart Number

First Name JANE

Middle Initial D

Zip Code 94583

State

Cell Phone Carrier Verizon

Emergency Phone (925) 111-2222

Email

Social Security No. 333-33-3333

Marital Status (S/M/D) S

Race

Language English

Type

Type

Type

Referral

STP Dr.

Interpreter KIM JOHNSON

Preferred Communication Method Phone-Cell

Registration Form REGISTRATION

<< BACK
NEXT >>
Clear
Exit

Modify
Ledger Remark
View Patient
View Patient Insurance
Payment History
Add Remark
View Remark

Charge & Billing Features

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
→99211-1232	OFFICE/OUTPATIENT VISIT,	1	5.00	1	2	11.12	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	Farmida 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
PRIME CLINICAL SYSTEMS
(626) 716-2033
Date Range: 01/01/2016-05/17/2016

Benchmarking Report

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 Walleled 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 Name From Date 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.

Charge & Billing Features

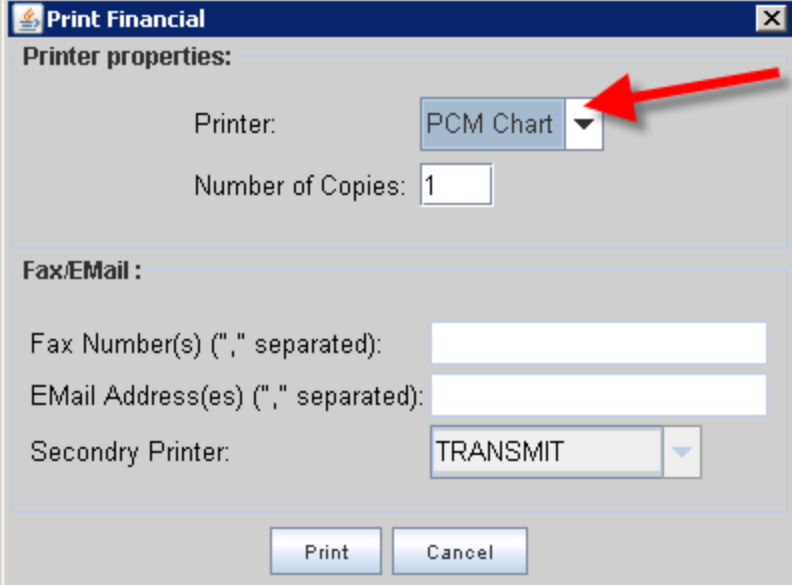
Management Reports: Export to PCM

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**'.



The screenshot shows a 'Print Financial' dialog box with the following fields:

- Printer properties:**
 - Printer: PCM Chart (indicated by a red arrow)
 - Number of Copies: 1
- Fax/EMail :**
 - Fax Number(s) ("," separated):
 - E-Mail Address(es) ("," separated):
 - Secondary Printer: TRANSMIT
- Buttons: Print, Cancel

Charge & Billing Features

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.

Last Name	First Name	D.O.B.	SSNum	MR	CL
INTELLECT_REPORTS	INTELLECT	2000-01-01		70365	5

All Pages | Int_rpt | Dicom

Doc Date	Doc Type	Author-Signor	Comment
<input type="checkbox"/> 2014-08-20	Journal	Scan-Nosig	
<input type="checkbox"/> 2014-08-15	Financial	Scan-Nosig	

Charge & Billing Features


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

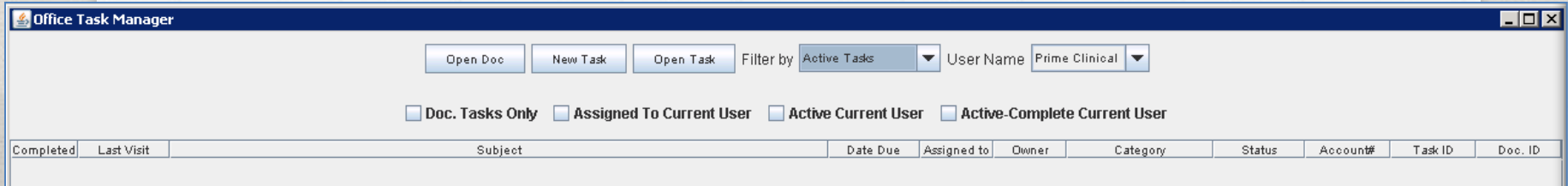
CMD	▲ Report #	Description	Tray	CON.	LS.	FF.	LENGTH	WIDTH	CODE	PRI.	COPY	Duplex	Where	Printer Type	First Page
RECEIPT_PA...	RECEIPT_PAYME...		T0		null		62	80					S	pcl	N
RECEIPT_FA...	RECEIPT_FACILITY		T0		null		62	80					S	pcl	Y
RECEIPT_CO...	RECEIPT_COLLEC...		T0		IO		60	80					S	pcl	Y
RECEIPT RE...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



NEW FEATURE

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.*



Completed	Last Visit	Subject	Date Due	Assigned to	Owner	Category	Status	Account#	Task ID	Doc. ID
-----------	------------	---------	----------	-------------	-------	----------	--------	----------	---------	---------

- 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

Office Task [X]

Subject Account# Name

Date Due  Time Due Category High Priority

Notes

Assign the Task to Other User(s)

Task not assigned

Assign To

Shared Task

Status

Reminder

Start Reminder

Start Reminder On

Start Reminder In from today's date/time

Reminder Interval

Owner

Task Owner: Prime Clinical

Completed

Owner Reminder

Start Reminder

Start Reminder On

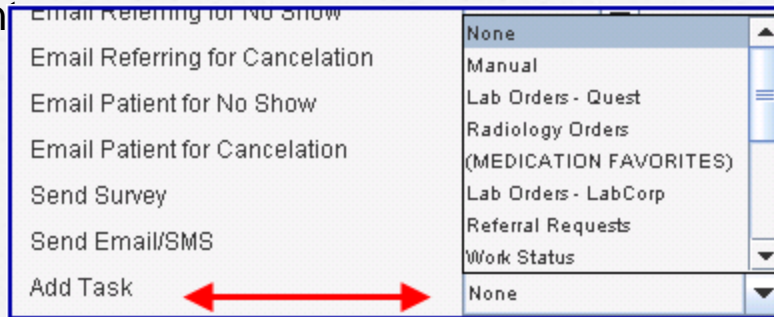
Start Reminder In from today's date/time

Reminder Interval

NEW FEATURE

OFFICE TASK MANAGER

- **Utility → Set Up → Appointment → Appointment Type <Add Task>:**
Set *Office Task Manager* to appear automatically when scheduling appointments



- **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.

COMING SOON!!!!

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	<input type="checkbox"/>	<input type="checkbox"/>		AUTO_PAY...
	TASK_AGING	Daily	10	<input type="checkbox"/>	<input type="checkbox"/>	12:00 AM	AGING
	TASK_APP_REMINDER	Year	10	<input checked="" type="checkbox"/>	<input type="checkbox"/>	02:00 PM	APPOINTME...
	TASK_ANALYSIS	Daily	16	<input checked="" type="checkbox"/>	<input type="checkbox"/>	12:00 AM	ANALYSIS
	TASK_STATEMENT1	Daily	61	<input type="checkbox"/>	<input type="checkbox"/>	12:00 AM	Group Of Pa...
	TASK_APP_DAILY_LIST_X	Daily	62	<input checked="" type="checkbox"/>	<input type="checkbox"/>		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.

Training Plans

Meaningful Use Tools

OnSTAFF/Intellect Info

PCM Info

PRIME INFO

User Clinics

Training Summary

New Client Intellect & PCM

Upgrading Clients

Work Comp Intellect & PCM

Continuing Education



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.

