

# Allscripts PM Training / Reference Guide

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# Table of Contents

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Section	Function	Page Numbers
1 - Overview	1-1 - Logging on and off	
	1-2 - Passwords	
	1-3 - Security Questions	
	1-4 - Resetting Forgotten Passwords	
	1-5 - Main Screen	
2 - Registration	2-1 - Registration Screen	
	2-2 - Summary Tab	
	2-3 - Patient Look Up	
	2-4 - Adding a New Patient	
	2-5 - Employer Information	
	2-6 - Account Tab	
	2-7 - Policies Tab	
	2-8 - Additional Tab	
	2-9 - Notes Management	
	2-10 - Documents Patient Registration Form	
	2-11 - Service Inquiry Diagnosis History	
	2-12 - Procedure History	
	2-13 - HCC History	
3 - Appointment Scheduling	3-1 - Patient Scheduling Tab	
	3-2 - Patient Scheduling Tab / Scheduling an Established Patient Appointment	
	3-3 - Patient Scheduling Tab / Open Appointment Scheduling and Registration Tabs	
	3-4 - Patient Scheduling Tab / Patient Look Up	
	3-5 - Patient Scheduling Tab / Create a New Patient	
	3-6 - Schedule an Appointment	

	3-7 - Patient Scheduling Tab / Find Open Times	
	3-8 - Patient Scheduling Tab / Schedule Appointment Screen	
	3-9 - Patient Scheduling Tab / Patient Information Command Button	
	3-10 - Patient Scheduling Tab / Walk In Appointment	
<b>Section</b>	<b>Function</b>	<b>Page Numbers</b>
<b>3 - Appointment Scheduling</b>	3-11 - Patient Scheduling Tab / Use Book Option	
	3-12 - Appointment Activity Tab	
	3-13 - Patient Activity Tab	
	3-14 - Patient Activity Tab / Patient Look up	
	3-15 - Patient Activity Tab / Right Click Options	
	3-16 - Patient Activity Tab / Right Click Options / Appointment Detail	
	3-17 - Patient Activity Tab / Right Click Options / Patient Information	
	3-18 - Patient Activity Tab / Right Click Options / Move Patient Appointment	
	3-19 - Patient Activity Tab / Using Open Times	
	3-20 - Patient Activity Tab / Using Book Option	
	3-21 - Patient Activity Tab / Print Encounter Form	
	3-22 - Patient Activity Tab / Request and View Eligibility	
<b>4 - Financial Inquiry</b>	4-1 - Financial Inquiry / Overview	
	4-2 - Financial Inquiry / Account Inquiry Tab	
	4-3 - Financial Inquiry / Viewing and Printing an Account Inquiry	
	4-4 - Financial Inquiry / Detail View	
	4-5 - Financial Inquiry / Summary View	
<b>5 - Appendix</b>	5-1 - Keyboard Shortcuts	
	5-2 - Icons and Command Buttons	
	5-3 - Checking the Application Version	
	5-4 - Using On Line Help	

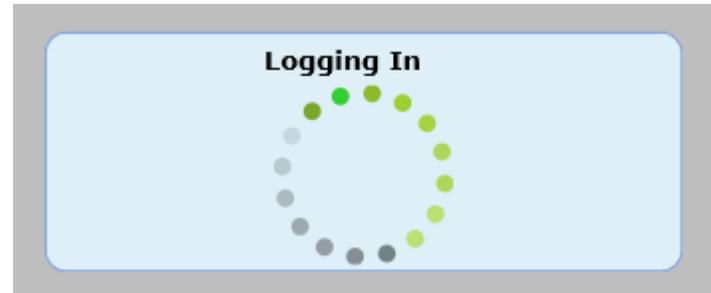
# Section 1 - Overview:

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## 1-1 Overview Logging On and Off



The login screen for Allscripts Practice Management features a green background with a pattern of overlapping circles. At the top, the text reads "Allscripts Practice Management™" with "Version 14.1.2.49" below it. The login form includes a "User Name" field, a "Password" field, and a "Forgot Password" button. A "Database" dropdown menu is set to "Training Database", with checkboxes for "Set Database as Default" and "Clear Default". A "Log In" button is positioned at the bottom of the form. The Allscripts logo and copyright notice "© 2000-15 Allscripts Healthcare Solutions, Inc." are located at the bottom of the page.



## Overview Logging On

- Click on the Allscripts icon  found on your desk top which opens the Logon Dialog box displayed above.
- **Tab** to or click in the field "User Name." **Key in your assigned user name.**
- **Tab** or click in the field "Password."
- If more than one Practice database is loaded on your network use your mouse on the Database prompt drop down arrow and click on the database you want to logon to. You can set this database as your default. The Logging In screen displays.
- This user name is stamped on the tables of records and transactions you enter while logged on as this user. This means every financial transaction entered, every quick note saved, every appointment scheduled, cancelled etc. is stamped as having been done by the operator associated with the registered user name entered in this dialog box.
- Be sure you only work in a Practice database that is opened with your assigned user name.
- Also, be sure to logoff when you leave your workstation.
- The user's name and password must first be registered in the Allscripts PM Security Database. **If not found please contact your System Administrator**

## Logging Off of Allscripts PM

**There are two types of logoff.**

1. Using the toolbar button  enables you to keep the application open while you exit a Practice database. This is useful when you leave your workstation for any period of time. It guarantees that only authorized users can logon to the Practice database in your absence.

If you have logged out of the application using the red arrow  a green arrow will display  to be able to log back into the system.

2. Clicking  closes the application. At the prompt "Are you sure you want to log off?" click **Yes**.

### Passwords:

User Passwords must conform to a specific format or message will appear.

## 1-2 Overview Logging On and Off- Passwords



Change Password for karenw

Your password has expired and must be changed in order to log in.

User Name:

Old Password:

New Password:

Verify New Password:

OK Cancel



Invalid Password

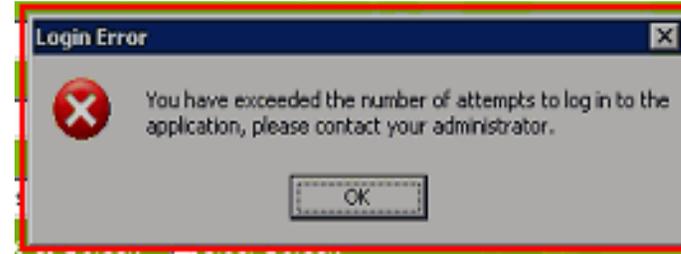
 Password must be a minimum of 8 characters in length  
Password must be a combination of 3 of the following:  
lower case letters  
upper case letters  
numbers  
punctuation  
Password has been used within 10 previous changes  
Password cannot be changed for 24 hours

OK

## Overview Logging On

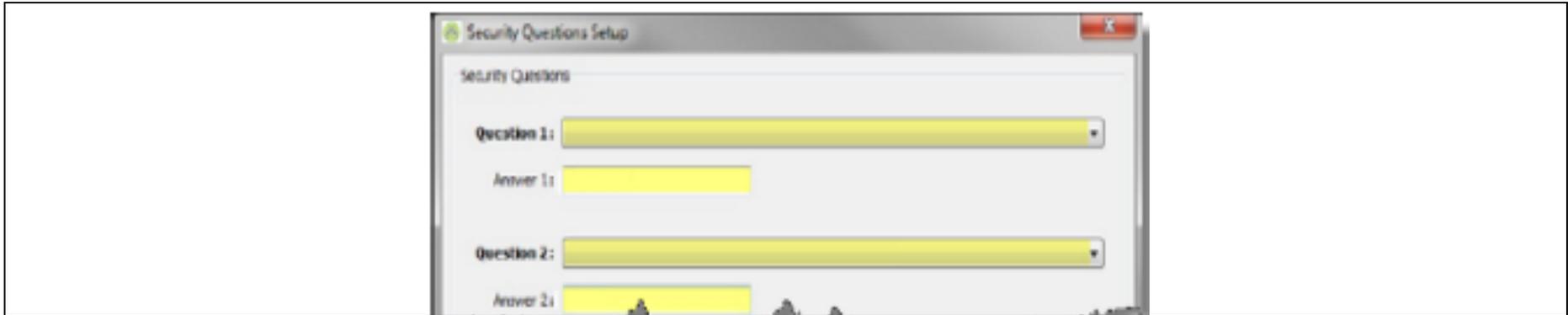
- User Passwords must conform to a specific format (if the format is not met, an invalid password message with display). **Passwords are case sensitive.**
- Your new password must conform to a specific criteria
  1. Is at least 8 characters
  2. Has not been used as one of your last 10 previous passwords
  3. Contains any combination of at least 3 of the following 4 character groups:
    - Uppercase characters (A-Z)
    - Lowercase characters (a-z)
    - Numerals (0-9)
    - Characters (such as but limited to:!,\$,#,%,&tilde)
  4. Has not been changed within the number of hours set for minimum password age in Security Options.

- Your account is automatically locked if you make **10** consecutive failed attempts to log into the Allscripts PM application. After each of the first **9** attempts an Invalid user name or password message displays. The **tenth** attempt also display an invalid message that you have exceed the number of login attempts displays and you are locked out.



- You will also have the possibility of using the “Reset a forgotten password” option if enabled. This option allows you:
  - To select and answer 5 security questions.
  - Enables a Forgot Password button on the logon window
  - Use the “Manage Security questions” option added to the Change Password toolbar screen
  - Audit tracking when you change your password using this option.
- If you attempt to reset your password but were unable to answer your security questions after **10** attempts, your account will be locked.

## 1-3 Overview Logging On Setting-up Security Questions



## Overview Logging On- Setting-up Security Questions

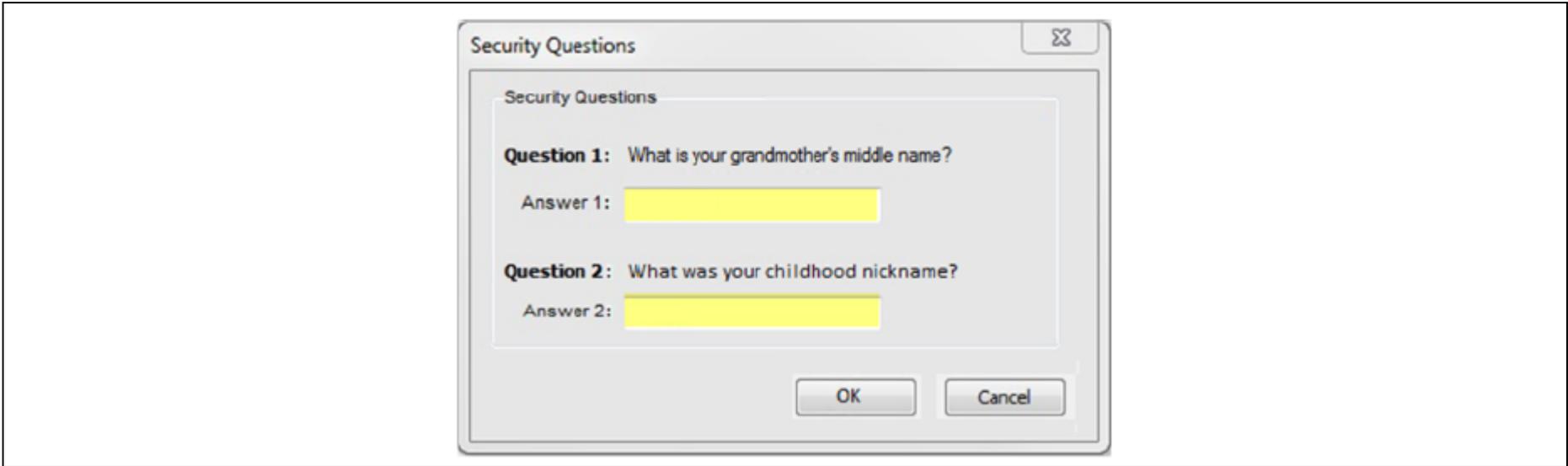
- The first time you successfully log on to Allscripts® Practice Management you will be asked to set up 5 security questions and answers. There are 29 questions from which you must select 5.
- You can choose to set up the security questions at a later time, but you will continue to be prompted with each logon until the setup is complete.
- The answers to the security questions are free-text, meaning you are not required to follow a specific format.
- You must pay close attention to the answers you enter during setup, because the answer you enter when you need to reset your password must be an exact match to the answer you entered during setup, except for capitalization. For example, if during setup you entered Rose-Marie as the answer to the question "What is your grandmother's middle name?", Rose-Marie or rose-marie are considered a match, but Rose Marie and Rosemarie are not acceptable answers. Any spaces you entered before, after, or within your answer text are considered part of your answer. If you entered a space before or after Rosemarie, you must enter the space in the same position when you are asked to answer the question.
- Your answers must be between 2 and 100 characters in length. They can be a mix of uppercase and lowercase letters, numbers, and special characters. You cannot use the same answer for multiple questions.

- After the security question setup is complete, you can reset your password without being logged on if you know your user name, you can correctly answer 2 of the 5 security questions you selected, and your account was not manually locked by your system administrator. If you are unable to correctly answer the first set of security questions, you can try again with a second set of randomly selected questions. If your second attempt is unsuccessful, you must contact your system administrator to have your password reset.

### Steps to set up Security Questions

1. If you have not already set up your questions, you will be prompted upon logon- click Yes to open the Security Questions Setup.  
OR- If you are logged into the application, but have not setup your questions, click on the  on the toolbar and select Manage Security Questions.
2. Select or change your questions from the pre-defined questions and enter corresponding answers. You must select 5 questions and your answers must be between 2 and 100 characters in length, a mix of upper/lower/numbers/special characters.
3. Click **Save**.

## 1-4 Overview Logging On Resetting a Forgotten Password



## Resetting a Forgotten Password

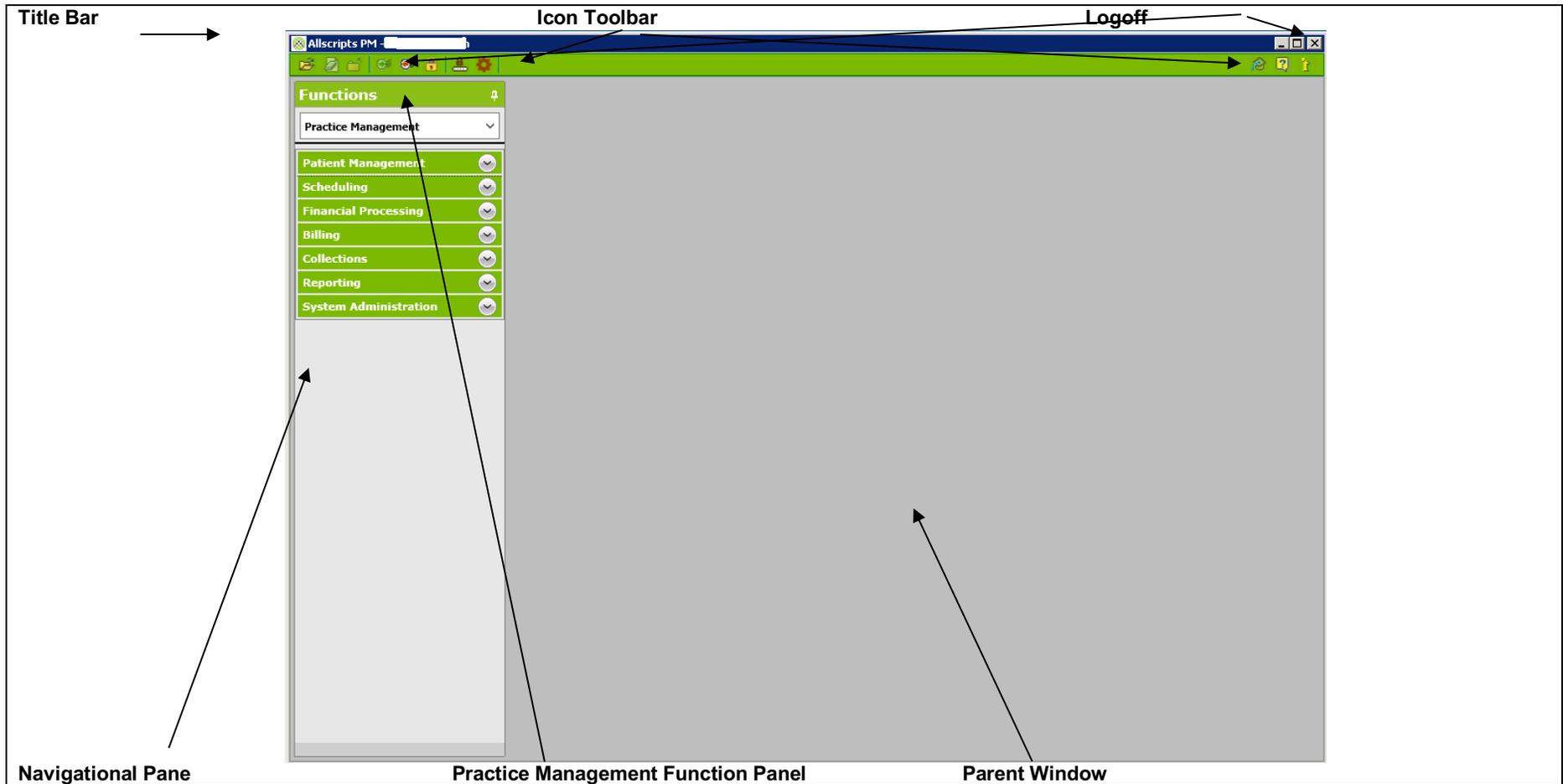
- You must have your security question setup complete before you can reset your password.
- If your security questions and answers are set up, and you have entered your user name and selected a database on the Allscripts® Practice Management logon window, you can use **Forgot Password** to reset your password

## Steps to Reset a forgotten password

1. On the Allscripts logon window, enter your user name and select a database. **Forgot Password** is enabled.
2. Click **Forgot Password** which will open the Security Questions window.
3. Enter an answer for each question. All answers boxes are highlighted in yellow, which indicate that they are required boxes. Your answers must match **EXACTLY** as they were set up. If you answer incorrectly, you will be able to try again with a different randomly selected set of questions. The second time if incorrect you will be locked out.
4. Click **OK**. The **Reset Password of [user name]** opens.
5. Enter your New Password and Verify New password.  
**Note:** Password must meet the same specified criteria.
6. Click **OK**

Your new password will be available to logon to the PM application.

## 1-5 Overview Main Screen



### Overview Main Screen

- Title bar displays “database” name
- Tool bar allows access to icon functionality
- Navigation pane on left allows access to system processes/ functions.
- Gray area is called the Parent window.
- Practice Management Function panel allows you to access the Office Manager function to work queues that have been set up.

**Title Bar-** Display the application name and the “database” or practice that you are working in.

Can use Alt/underlined letter to access each option on the ribbon menu.

# Section 2 - Registration:

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## Registration

- Ability to view patient information entered on an existing patient via the Summary Tab
- Ability to view patient demographic information on an existing patient via the Patient Tab
- Ability to view patient guarantor, subscriber, contact information on an existing patient via the Account Tab
- Ability to view patient insurance information on an existing patient via the Policies Tab
- Ability to view patient Additional Information on an existing patient via the Additional Info Tab.

- Ability to **search** for a patient using the binoculars icon .
- Ability to add a new patient's demographic information, account information, insurance information and additional information using the Magic Wand icon  (or Alt/Down arrow).
- Ability to pull a patient into focus by Patient number by entering the patient number and pressing Tab (the key icon displays).
- 
- You can access the various tabs in Registration by clicking on the tab or Alt/underlined letter or use the hyperlinks at Patient Information, Account Information or Policy Information.
- **Always search before creating a new patient.**

## 2-2 Patient Management>Registration>Summary Tab

The screenshot shows a medical software interface for a patient named Sallie Cigna. The interface is divided into a sidebar on the left and a main content area on the right. The sidebar contains several sections: 'Functions' (Practice Management), 'Patient Management' (Registration, Notes, Documents, Service Inquiry, PHI Inquiry, Automatic Registration, Allscripts PM Today), 'Scheduling', 'Financial Processing', 'Billing', 'Collections', 'Reporting', and 'System Administration'. The main content area is titled 'Sallie Cigna Pt# 60 - Bal. \$0.00' and has tabs for 'Summary', 'Patient', 'Account', 'Policies', 'Additional Info', and 'History'. The 'Summary' tab is active, displaying patient information in several sections: 'Patient Information' (Name, Address, Phone numbers, Sex, Birth Date, Usual Provider, Referring Dr, Prim Care Phys, Med. Rec. Loc, Med. Rec. No, Race, Ethnicity, Language), 'Account Information' (Contact table, Account details, Home/Work/Cell phone numbers), and 'Policy Information' (Coverage table, Subscriber details, Certificate ID, Group Name, Group Number, Carrier Contact, Carrier#, Coverage Type). At the bottom right of the main area are 'Save' and 'Cancel' buttons.

## Registration> Summary Tab

- After **searching** for a patient and bringing the patient info focus, the Summary Tab appears providing **view only** information, no changes can be done in this tab.
- Name, Address, Phone, Patient comments, Sex, DOB, Usual Provider, Referring Dr, Med Rec Location and No, Account and Policy with subscriber information displays.
- You can “hover” over the **Patient Information, Account Information** or **Policy Information** command buttons to display a “hand icon”. By clicking on the hand icon you can quickly go to the chosen **Registration Tab, Account Tab** or **Policy Tab**.

## Notes, Policies, Procedures

Suggested that if you leave your terminal while working in Registration, especially if you have a patient in focus, you minimize the Registration workbook by clicking on the minimize button in the child window or clear the screen of the patient information using the Clear Form icon  from the toolbar.

The telephone icon  next to a phone number indicates this is the preferred number for contact across the system where phone numbers are displayed.

## 2-3 Registration- Patient Lookup

**Patient Lookup** [X]

Search By: Patient Name [v] Search For: smi,sal  
Search By 2: [v] Search For: [v]  
Search By 3: [v] Search For: [v]

Save Search By Settings  
 Include Inactive Patients

Local Search Enterprise Search

Advanced Search

Patient Name: [v] Patient Number: [v]  
Name (Soundex): [v] Guarantor Name: [v]  
SSN: [v] Telephone No.: [v]  
DOB: [v] Medical Rec No.: [v]  
Enterprise Number: [v] Primary Certificate No.: [v]

Patient Additional Information

Field Name	Search For

Patient Name	Birth Date	SSN	Address	City
Smith, Sally M	01/01/1950	999-99-9999	123 Main St	Rale

New Patient OK Cancel Help

## Registration- Patient Lookup

1. Enter the search criteria for the search (down arrow at Search By prompt or F4). You can search by Patient Name, SSN, DOB, Patient #, Guarantor Name, Tel #, or do an Advanced Search with multiple parameters.
2. Enter the search value in the Search For prompt. You can use % as wildcard, before, after the search value.
3. Click **Local Search**
4. Highlight the correct patient in the grid displayed at the bottom of the screen.
5. Click **OK**.
6. If the patient is not found- can click on the **New Patient** command button to create a new entry.

## Notes, Policies, Procedures

Can use first few letters Lname, Fname  
Can search by first name ,Fname  
Can choose the default for **Search By** by checking the **Save Search by Settings** box- this is user/workstation specific  
You can do a multiple Parameter Search- Search By is primary  
Search by : 2 secondary parameter  
Search by: 3 third parameter  
If you enter a 2 or 3 Search it makes these mandatory to enter value search criteria.  
Your search can include Inactive patients by checking the box.  
The Search For criteria can be set up for number of required characters for patient last name lookup.

## Patient Management>Registration- Adding a New Patient

The screenshot shows a dialog box titled "Begin New Patient" with a close button in the top right corner. The dialog contains the following fields and controls:

- Patient#:** A text input field.
- SSN:** A text input field.
- Last Name:** A text input field with a search icon (magnifying glass) to its right.
- First Name:** A text input field.
- Initial:** A text input field.
- Birth Date:** A date selection field with a downward arrow icon.

At the bottom of the dialog, there are three buttons: **OK**, **Cancel**, and **Help**.

## Registration- Adding a New Patient

- After **Searching**, if the patient is not found in the database, click on **New Patient** command button in bottom left of the Lookup screen.
- The **Begin New Patient** screen displays.
- Enter the Patient's SSN (if **given to you**)
- Enter the Patient's Last Name, First Name, middle initial and Date of Birth.
- Click **OK**.

## Notes, Policies, Procedures

Bold prompts displaying in “vanilla” are required.

Use Proper Case- Need to use shift key to capitalize 1<sup>st</sup> letter of First and Last names, address, etc. DO NOT use all CAPS.

Punctuation- can use spaces for hyphen names, no special characters, avoid periods, etc.

## 2-4 Patient Management>Registration>Patient Tab- Enter a New Patient

(New Patient) X
Registration

Summary
Patient
Account
Policies
Additional Info
History

DOB:
Sex:

SSN:
Age:

— Patient Information —

Patient:  ⌂ 🔍 ↩

---

Patient#:  SSN:

Last Name:

First, MI:   Suffix:

Address 1:

Address 2:

City:  State:

Zip Code:  ⌂ 🔍 ↩ Country:

Home Tel#:   Ext:

Work Tel#:   Ext:

Cell#:

Sex:

Birth Date:

Employer:  ⌂ 🔍 ↩

E-Mail:

Enterprise#:

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Usual Prov:

Referring Dr:  ⌂ 🔍 ↩

PCP:  ⌂ 🔍 ↩

Med. Rec. Loc:

Med. Rec. No:

Marital:

Employment:

Student:

Inactivation Date:

HIPAA Stmt Exp:

Rel to Guar:

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Comments:

**Registration- Enter a New Patient**

- Enter demographic information on a patient
- Enter Employer information on a patient
- Enter a-Referring Provider on a patient
- Enter a Medical Record location or number on a patient

**Notes, Policies, Procedures**

Proceed to the Account Tab to continue the registration.  
Proceed to the Policies Tab to continue the registration.  
Proceed to the Additional Tab to complete the registration.

**Registration –Enter a New Patient**

## Fields in the Patient Tab

1. **Patient Number** – Is typically assigned by system when saved.
2. **SSN**- Social Security #. **No need to enter dashes as the system will format the field**
3. **Last Name** - The system displays the information entered in the Begin New Patient Screen. Verify or complete the entry.
4. **First Name** - The system displays the information entered in the Begin New Patient screen. Verify or complete the entry.
5. **MI** - Middle initial.
6. **Suffix** - Enter any initials that may follow the patient's name (Jr, Sr, III, etc.)
7. **Address 1** - Do not use invalid characters such as -, \*, @. Address 1 & 2 go on statements. **Between both fields 40 characters can be entered but only the first 30 characters between both fields will print on the statement.**
8. **Address 2**- Address 2 does NOT go on a claim (paper or EDI)
9. **City, State and Zip**- The system will default the City and State based on the zip code you enter. If the zip code has been used for a previous entry. Otherwise enter the City, St and Zip.
10. **Country**- Can enter the Country **if outside the US**
11. **H/Phone** - Enter the home area code and phone. The system will format in (XXX) XXX-XXXX. Check box to indicate preferred #.
12. **W/Phone** - Enter the work area code and phone. The system will format in (XXX) XXX-XXXX. Check box to indicate preferred #.
13. **Ext** - Enter the home or work phone extension. System will accept 5 alphanumeric characters.
14. **Cell Number**- Enter the cell area code and phone. The system will format in (XXX) XXX-XXXX. Check box to indicate preferred #.
15. **Sex** - Enter the code or use the  to select the patient's sex (or F4).
16. **Date of Birth** - Use the MM/DD/YYYY format to enter the patient's birth date. The system displays the information entered in the Begin New Patient Screen. Verify or complete the entry.
17. **Employer**- Use the binoculars  to look up the employer. Enter the search criteria and choose from the listing. If the Employer is not **Policy and Procedure for Referring field:**

18. **Referring Dr**- Enter the patient's referring doctor. Use the binoculars  to scan (or Alt/Down arrow) for the referring doctor.
19. **PCP**- Enter the patient's PCP. Use the binoculars  to scan (or Alt/Down arrow) for the PCP.
20. **Comment**- Enter a free text comment that will display on the Patient Summary Screen. This comment can be a permanent need a patient may have such as handicap, language need, alternative name or nickname. Displays in Scheduling and Summary Tab. in the system, you can create a new employer by clicking on the Magic wand  icon (or Insert key).
21. **E-Mail**- Enter the patient's e-mail address if provided.

## Notes, Policies, and Procedures

- Bold prompts displaying in “vanilla” are required.
- Use Proper Case- Need to use shift key to capitalize 1<sup>st</sup> letter of First and Last names, address, etc. DO NOT use all CAPS.
- Punctuation- can use spaces for hyphen names, no special characters, avoid periods, etc.

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## 2-5 Patient Management>Registration>Patient Tab- Enter a Patient's Employer

The screenshot displays two overlapping windows from a medical software application. The 'Employer Lookup' window is in the foreground, showing a search interface with a dropdown menu set to 'Employer Name' and a search box containing 'all'. Below the search box is a 'Local Search' button and a 'Save Search By Setting' checkbox. A table lists three employers: Allscripts (ALLSC, 220 Merchandise Mart, Chicago IL 68014), Allscripts (ALLSCRIP, 222 Merchandise Mart Suite 2024, Chicago IL 60654), and Allscripts (ANH, 123 Sesame Street, Nashua NH 03038). The 'Add New Employer' window is partially visible behind it, containing fields for Abbreviation, Employer Name, Address 1, Address 2, City, State, Zip Code, Country, Telephone, Ext, Fax, E-Mail, and Contact Name. Both windows have 'OK', 'Cancel', and 'Help' buttons at the bottom.

Employer Name	Abbreviation	Address	City/State/Zip
Allscripts	ALLSC	220 Merchandise Mart	Chicago IL 68014
Allscripts	ALLSCRIP	222 Merchandise Mart Suite 2024	Chicago IL 60654
Allscripts	ANH	123 Sesame Street	Nashua NH 03038

### Registration- Enter a Patient's Employer

- **Search** for the Employer for the patient, click on the binoculars.
- The **Employer Lookup** screen displays.
- Choose to **Search By**: Abbreviation or Employer Name.
- Enter **Search For** criteria and click on **Local Search**.
- Highlight the correct employer from the grid listing.
- Click on **OK** to add the existing employer to the patient's record.

### Enter a New Employer

- Scan for the Employer for the patient, click on the binoculars.
- The **Employer Lookup** screen displays.
- Choose to Search By: Abbreviation or Employer Name.
- Enter Search For criteria and click on **Local Search**.
- If the Employer is not found, click on the **New Employer** command button. The **Add New Employer** screen displays.
- OR- Click on the wand icon to add display the **Add New Employer** screen.
- Complete the prompts. The Abbreviation of the employer should be all CAPS. The Employer Name and Address should be proper case.
- Click **Save** to add the new employer to the master file and the patient's file.

## 2-6 Patient Management>Registration>Account Tab

**Sallie Medicare Pt# 20 - Bal. \$5.00** 

Registration

Summary Patient **Account** Policies Additional Info History

**Sallie Medicare** **DOB:** 01/15/1940 **Sex:** F  
**SSN:** 239-08-9876 **Age:** 75 years

Account Information

**Acct Type:** Standard Account# 20

Comments:

Contact	Type	Home#
 Sallie Medicare	Guar,Pat,Sub	(919) 689-0987
 James Medicare	Sub	(919) 689-0987
 Julie Medicare	Emg	(919) 689-0987

Guar  Stmts  Subscriber **Home Tel#:** (919) 689-0987  Ext:

**Last Name:** Medicare **Work Tel#:**   Ext:

**First, MI:** Sallie  Suffix:  **Cell#:**

Address 1: 123 Main St **Sex:** Female

Address 2:  **Birth Date:** 01/15/1940

City: Raleigh  State: NC  **SSN:** 239-08-9876

Zip Code: 27615    Country:  **Employer:**

Insured Name: Medicare, Sally A    **E-Mail:**

Comments:

Emergency Contact Relation to Patient:

Last Modified: 4/28/2015 9:31:56 AM (EST) By: mlincoln

### Account Build

Please specify how to add an Account record to this patient...

- Search for an Existing Account
- Build a New Account:**
- Patient is Guarantor

OK

Cancel

### Registration- Account Tab

- Build the patient's Account information and establish Guarantor, Subscriber and Emergency contact information.
- The system will prompt the account build of a new account with the Patient as the Guarantor. If you click **OK** the patient demographic information will be copied and the patient contact will be built as a Guarantor record.
- You can use the Magic Wand icon  (or Insert) to build a new contact such as subscriber or Emergency contact.

### Notes, Policies, and Procedures

- **Add the guarantor if not the same as the patient – check the box for guarantor**
- **Add subscriber(s) if applicable – check the box for subscriber**
- **Gender and DOB required for guarantor and subscribers**
- **Add emergency contact if given – check the box for emergency contact**

### Registration –Account Tab

**Fields in the Account Tab** – Tab is divided into 4 section grids,

**Use Magic wand to create a new contact.**

1<sup>st</sup> grid is Account Type

- Account type- **Defaults to Standard. Do not change unless directed.**
- Comments related to Acct Types, free text field, 81 characters and displays in Charge Entry and Financial Inquiry.

2<sup>nd</sup> section is Contacts

- You can build as many contacts as the patient needs.
- Contacts can be subscribers, guarantors, entries who need to receive the stmt, emergency contacts
- For Emergency Contact indicate by checking box in 4<sup>th</sup> section. A patient can only have 1 Emergency contact at a time.
- Guarantor rises to the top of the contact list. A patient can only have 1 designated guarantor at a time.
- Contact can be designated for statements only which allows the capability to have a stmt sent to this person for the patient.
- Guarantor gets statement for all outstanding balances and additional stmt goes to all contacts designated with “Send Stmt”
- Need to designate a Subscriber to make them available in the Policies tab. **Make sure you Click on the Subscriber box to designate the contact as a subscriber.**

3<sup>rd</sup> section is contact demo information

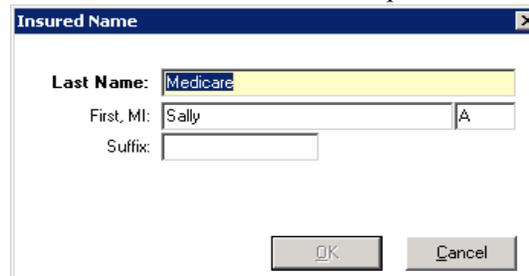
- Some demographic information copies from the patient when you create a new contact.
- Check boxes to indicate Preferred phone number for contact.
- You can also define a different Insured name when the patient is the subscriber and the patient name listed on the insurance policy is not the same

Click on the ellipses next to Insured name prompt. 

- An Insured Name screen will display to enter a different name. Click OK to save the entry.

**\*\*If different, this name will not change if the patient’s name is updated in Registration tab.**

This will be the name that is reported when processing paper and electronic claims for subscriber relationships set to Self.



4<sup>th</sup> section is Emergency Contact designation

- Check box to indicate contact is Emergency Contact- only allowed 1 per patient
- Comments- Enter the free text comment for the Emergency contact.

## 2-7 Patient Management>Registration> Policies Tab

**Sallie Medicare Pt# 20 - Bal. \$0.00** ✕  
Registration

Summary
Patient
Account
Policies
Additional Info
History

**Sallie Medicare**
DOB: 01/15/1940    Sex: F  
SSN: 239-08-9876    Age: 75 years

Policy Information

	Coverage	Coverage Type	Carrier	Status	Plan	Subscriber
✕	Primary	Medical	Medicare			Sallie Medicare
	Secondary	Medical	Blue Cross Blue Shield		/00	James Medicare

**Coverage:** Primary Medicare  
PO Box 5002  
Raleigh, NC 27615  
(800) 201-0009

**Insurance:** Medicare (no plan)/[no plan] ✕

Ailment:  ✕

Employer:  ✕

Eff Date: 01/01/2012 ▼    Exp Date:  ▼

**Asgn:** Yes ▼

**Subscriber:** Sallie Medicare (Guar,Pat,Sub) ▼

**Cert No.:** 239089876A

Grp Name:

Group No.:

Policy Tel#:     Ext:

**Patient's Relationship:** Self ▼

Patient's Cert Suffix:

Subscriber's Cert Suffix:

Subscriber's Birth Date: 01/15/1940

Secondary Co-Pay Coverage

Comments:

Save    Cancel

<p><b>Registration- Policies Tab</b></p> <ul style="list-style-type: none"> <li>• Enter the patient’s insurance carriers.</li> <li>• Attach Ailment and employer records.</li> <li>• Enter effective dates, Subscriber information (from the Account Tab), policy and group numbers, patient’s relationship and any comments regarding this carrier record.</li> <li>• Click on the <b>Magic Wand</b>  (or Insert key) to create a new entry, enter the appropriate/required information and <b>SAVE</b>.</li> </ul>	<p><b>Notes, Policies, Procedures</b></p>
<p><b>Registration –Policies Tab</b></p>	

## 2-8 Patient Management>Notes>Note Management Tab

Note Management [Sallie Medicare Pt# 20] Notes

**Note Management**

Patient: Sallie Medicare  
Address: 123 Main St  
Raleigh, NC 27615

Patient Notes  Collection Notes  Other Acct Notes  
 Claim Notes  Service Notes  Voucher Notes  
 HIPAA Notes  
Home Tel#: (919) 689-0987  
Work Tel#: \_\_\_\_\_  
Cell#: \_\_\_\_\_

Date/Time	Type	Subject	Operator	Expires
01/15/15 07:10:43 pm (EST)	INACTPAT	Inactive Patient	mllncoln	

Note Type: Inactive Patient Expiration Date: \_\_\_\_\_  
Subject: Inactive Patient

Patient# 50 was inactivated on 1/13/2015 12:00:00 AM

Save Cancel

## Note Management Tab

- To access Note Management: Double-click **Patient Management** > Double-click **Notes** or **F9>NOT**
- **Note Management** allows those users with the Security Permissions to do the following: Add a note to a Patient record, View / Print / Email any Note which has been attached to a Patient's record or Edit / Delete existing notes on a Patient record
- The screen opens displaying all Note Types which are associated with the Patient's record.
- Suggested not to delete notes so that you have a history.
- Expired notes disappear the next day.

## Notes, Policies and Procedures

The default is to display the following note types: Patient, Collection, Other Acct Notes. To display Claim, Service and Voucher note types click on the appropriate checkbox.

**Note:** Though *Claim Notes*, *Service Notes*, and *Voucher Notes* cannot be added from this screen, you can view and edit these Note Types here. Check the box at the top of the screen. Users with security permission can also then edit these note types.

**Note:** If a warning note no longer applies, you can change the type to History of Warning note and include the subject. The note will no longer display.



### Steps to Enter Notes

1. Retrieve a Patient or Guarantor by entering the patient/guarantor number and then tab, OR search for the patient
2. Be sure the type of note you are adding is checked.
3. Click the **Wand icon** (or use the **Insert** key).
4. Click the down arrow to open the Note Type drop-down list.  
**Note:** The list of Note Types available exclude Claim, Service, and Voucher Notes
5. Choose the type of note you want to enter.
6. Enter text on the subject line that identifies the reason for adding this note. This text displays in the upper grid on this screen. This is a required field.  
**Note:** If a Default Subject was entered for the selected Note in Note Type Maintenance it will appear here.
7. **Tab** to bring the cursor in the text grid. The text in this grid displays only on this screen. Enter your note.
8. Click **Save** or **Alt+s** to save your entry.

### To Delete a Note

Bring the patient and note into focus and click on the  Delete option.

### Note Types:

#### Patient Notes:

- Specific to a Patient's record; cannot be viewed on the records of those other Patients who share the same Guarantor
- Can prevent new appointments or prevent encounter forms from printing
- Example: To add special notes to a Patient record such as, need for special treatment

#### Other Notes:

- Generic type of note that is specific to the Patient's record; cannot be viewed on the records of those other Patients who share the same Guarantor
- Can hold statements, prevent new appointments and prevent encounter forms from printing
- Example: To indicate that an X-ray or attorney's letter is part of the Patient record.

### Collection Notes:

- Collection Notes can be created to identify Patients or Accounts that are delinquent or in collections.
- When a Collection Notes is added to the Guarantor record it is viewable on the records of all those Patients who share that Guarantor.

### Claim Notes:

- Claim Notes are used to add notes to a claim for purposes of managing an unpaid claim.
- They are created from Unpaid Claims Management and from the Account Ledger screen and can be viewed in Unpaid Claims Management, Pending Claims Management and Account Ledger.

### Service Notes:

- Service notes are specific to a service line on a voucher.
- You can add a Service Note to a voucher line from the Payment Entry, Edits, and the Account Ledger
- You can view a voucher's Service Notes in Account Inquiry and Payment Entry viewers when selected as a view option. Service Notes attached to vouchers associated with a Patient can be viewed in Note Management.

### Voucher Notes:

- Voucher Notes are voucher specific.
- A voucher note can be added using the Quick Note icon from the toolbar in Account Inquiry in Financial Inquiry, Payment Entry in Transactions, or Edits Tab in Batch Management.
- A voucher note can also be entered using the right click on the voucher in Pending Claims Management or Account Ledger.

### HIPAA Notes:

- HIPAA Note types are used to facilitate the capture and display of HIPAA information.
- In compliance with HIPAA privacy requirements these notes are specific to a Patient's record. They cannot be viewed on the records of those other Patients who share the same Guarantor.
- HIPAA Notes can be accessed from Note Management COMpanion screen by using the HIPAA Note toolbar button or Note Management screen
- HIPAA notes are created using the HIPAA note icon on the toolbar while in Registration or Scheduling.





### Steps to Enter Notes

9. Retrieve a Patient or Guarantor by entering the patient/guarantor number and then tab, OR search for the patient
10. Be sure the type of note you are adding is checked.
11. Click the **Wand icon** (or use the **Insert** key).
12. Click the down arrow to open the Note Type drop-down list.  
**Note:** The list of Note Types available exclude Claim, Service, and Voucher Notes
13. Choose the type of note you want to enter.
14. Enter text on the subject line that identifies the reason for adding this note. This text displays in the upper grid on this screen. This is a required field.  
**Note:** If a Default Subject was entered for the selected Note in Note Type Maintenance it will appear here.
15. **Tab** to bring the cursor in the text grid. The text in this grid displays only on this screen. Enter your note.
16. Click **Save** or **Alt+s** to save your entry.

### To Delete a Note

Bring the patient and note into focus and click on the  Delete option.

### Note Types:

#### Patient Notes:

- Specific to a Patient's record; cannot be viewed on the records of those other Patients who share the same Guarantor
- Can prevent new appointments or prevent encounter forms from printing
- Example: To add special notes to a Patient record such as, need for special treatment

#### Other Notes:

- Generic type of note that is specific to the Patient's record; cannot be viewed on the records of those other Patients who share the same Guarantor
- Can hold statements, prevent new appointments and prevent encounter forms from printing
- Example: To indicate that an X-ray or attorney's letter is part of the Patient record.

### Collection Notes:

- Collection Notes can be created to identify Patients or Accounts that are delinquent or in collections.
- When a Collection Notes is added to the Guarantor record it is viewable on the records of all those Patients who share that Guarantor.

### Claim Notes:

- Claim Notes are used to add notes to a claim for purposes of managing an unpaid claim.
- They are created from Unpaid Claims Management and from the Account Ledger screen and can be viewed in Unpaid Claims Management, Pending Claims Management and Account Ledger.

### Service Notes:

- Service notes are specific to a service line on a voucher.
- You can add a Service Note to a voucher line from the Payment Entry, Edits, and the Account Ledger
- You can view a voucher's Service Notes in Account Inquiry and Payment Entry viewers when selected as a view option. Service Notes attached to vouchers associated with a Patient can be viewed in Note Management.

### Voucher Notes:

- Voucher Notes are voucher specific.
- A voucher note can be added using the Quick Note icon from the toolbar in Account Inquiry in Financial Inquiry, Payment Entry in Transactions, or Edits Tab in Batch Management.
- A voucher note can also be entered using the right click on the voucher in Pending Claims Management or Account Ledger.

### HIPAA Notes:

- HIPAA Note types are used to facilitate the capture and display of HIPAA information.
- In compliance with HIPAA privacy requirements these notes are specific to a Patient's record. They cannot be viewed on the records of those other Patients who share the same Guarantor.
- HIPAA Notes can be accessed from Note Management COMpanion screen by using the HIPAA Note toolbar button or Note Management screen
- HIPAA notes are created using the HIPAA note icon on the toolbar while in Registration or Scheduling.



# Patient Management>Documents>Patient Documents Tab

**Patient Documents** Documents

Document Management **Patient Documents**

Document: Patient Registration Sheet

Field Name	Value
------------	-------

Appointment Dates - From: | | To: | |

Select Account Types: All Account Types

Select Employers: All Employers

Select Med Rec Locations: All Medical Record Locations

Select Patients: All Patients

Select Prim Care Phys: All Primary Care Physicians

Select Referring Doctors: All Referring Doctors

Select Usual Providers: All Usual Providers

Print Preyview

## Patient Documents Tab

- To access Document Management: Double-click **Patient Management** > Double-click **Documents** or **F9>DOC**
- Any master document created with the Data Type "Patient Information" can be batch printed from this screen.
- You can print a document for a single patient or a batch of patients based on the criteria selected (appointment date, Account type, Employer, Medical Record Locations, Prim Care physician, Referring Dr, Usual Provider).
- You will need to create a document in DOM to output the identifying data.

## Steps to Print a Master document

1. From the drop-down listing for *Document*, select the Patient Document you want to print or batch print.
2. If Custom fields have been defined for the document they will display in the grid. Any text entered will be identically included on each form letter printed.
3. Entering an appointment date or date range will include only Patients who have scheduled appointments for the specified date or range. Includes Patients with appointments having the statuses of "scheduled", "confirmed", and "wait list".
4. Choose which Account types, Employers, Med Rec Location, Patients, Prim Care Physician, Referring Doctors, Usual Provider
5. Click **Print** to print the document or batch of documents.
6. Click **Preview** to preview the document or batch of documents.

# Patient Management>Documents>Patient Documents Tab

**Patient Documents** Documents

Document Management **Patient Documents**

Document: Patient Registration Sheet

Field Name	Value
------------	-------

Appointment Dates - From: | | To: | |

Select Account Types: All Account Types

Select Employers: All Employers

Select Med Rec Locations: All Medical Record Locations

Select Patients: All Patients

Select Prim Care Phys: All Primary Care Physicians

Select Referring Doctors: All Referring Doctors

Select Usual Providers: All Usual Providers

Print Preview

## Patient Documents Tab

- To access Document Management: Double-click **Patient Management** > Double-click **Documents** or **F9>DOC**
- Any master document created with the Data Type "Patient Information" can be batch printed from this screen.
- You can print a document for a single patient or a batch of patients based on the criteria selected (appointment date, Account type, Employer, Medical Record Locations, Prim Care physician, Referring Dr, Usual Provider).
- You will need to create a document in DOM to output the identifying data.

## Steps to Print a Master document

7. From the drop-down listing for *Document*, select the Patient Document you want to print or batch print.
8. If Custom fields have been defined for the document they will display in the grid. Any text entered will be identically included on each form letter printed.
9. Entering an appointment date or date range will include only Patients who have scheduled appointments for the specified date or range. Includes Patients with appointments having the statuses of "scheduled", "confirmed", and "wait list".
10. Choose which Account types, Employers, Med Rec Location, Patients, Prim Care Physician, Referring Doctors, Usual Provider
11. Click **Print** to print the document or batch of documents.
12. Click **Preview** to preview the document or batch of documents.

## 2-11 Patient Management>Service Inquiry> Diagnosis History Tab

**Sallie Medicare Pt# 20**  
Service Inquiry

**Diagnosis History** | Procedure History | HCC Diagnosis History

Patient: Sallie Medicare

Home Tel#: (919) 689-0987      Sex: Female  
Work Tel#:      Birth Date: 01/15/1940  
Cell#:      Age: 75 years  
SSN: 239-08-9876

Service Date	Code	Description	Code Set	Provider
02/20/2015	401.9	Hypertension, Essential Nos	ICD-9	KSA
01/27/2015	401.9	Hypertension, Essential Nos	ICD-9	KSA
01/17/2015	401.9	Hypertension, Essential Nos	ICD-9	KSA
01/17/2015	401.9	Hypertension, Essential Nos	ICD-9	KSA
01/15/2015	401.9	Hypertension, Essential Nos	ICD-9	KSA
01/15/2015	401.9	Hypertension, Essential Nos	ICD-9	KSA
12/04/2014	401.9	Hypertension, Essential Nos	ICD-9	KSA
12/04/2014	401.9	Hypertension, Essential Nos	ICD-9	KSA
12/04/2014	401.9	Hypertension, Essential Nos	ICD-9	KSA
12/04/2014	401.9	Hypertension, Essential Nos	ICD-9	KSA
12/04/2014	401.9	Hypertension, Essential Nos	ICD-9	KSA
12/04/2014	401.9	Hypertension, Essential Nos	ICD-9	KSA
12/04/2014	401.9	Hypertension, Essential Nos	ICD-9	KSA
12/03/2014	401.9	Hypertension, Essential Nos	ICD-9	KSA
12/03/2014	401.9	Hypertension, Essential Nos	ICD-9	KSA
12/01/2014	401.9	Hypertension, Essential Nos	ICD-9	KSA
12/01/2014	401.9	Hypertension, Essential Nos	ICD-9	KSA
12/01/2014	401.9	Hypertension, Essential Nos	ICD-9	KSA
12/01/2014	401.9	Hypertension, Essential Nos	ICD-9	KSA
11/30/2014	401.9	Hypertension, Essential Nos	ICD-9	KSA
11/30/2014	401.9	Hypertension, Essential Nos	ICD-9	KSA
11/28/2014	401.9	Hypertension, Essential Nos	ICD-9	KSA
11/28/2014	401.9	Hypertension, Essential Nos	ICD-9	KSA
11/27/2014	401.9	Hypertension, Essential Nos	ICD-9	KSA
11/27/2014	401.9	Hypertension, Essential Nos	ICD-9	KSA
11/26/2014	401.9	Hypertension, Essential Nos	ICD-9	KSA
11/26/2014	401.9	Hypertension, Essential Nos	ICD-9	KSA

### Service Inquiry Diagnosis History Tab

- To access Service Inquiry choose **Patient Management** from the Navigation tree>**Service Inquiry** folder.
- If you had a patient in view when you access Service Inquiry, than patient's information will display.
- You can scan for a Patient using the binoculars.
- The Diagnosis History screen displays each diagnosis that is a part of the Patient record by date of service.
- The screen display Service Date, Diagnosis Code, Description and Provider.

### Notes, Policies and Procedures

**TIP!** Click the headings bar to change the order of the display to ascending or descending order for each column.

**TIP!** You can right click on the service line item or multiple service dates and choose to **View** the history and from the view, you can Print or E-mail to the patient.



## 2-12 Patient Management>Service Inquiry>Procedure History Tab

**Sallie Medicare Pt# 20** ✕  
 Service Inquiry

Diagnosis History
Procedure History
HCC Diagnosis History

Patient:  🔍  
 Home Tel#: (919) 689-0987      Sex: Female  
 Work Tel#:      Birth Date: 01/15/1940      Procedure Group:  
 Cell#:      Age: 75 years         
 SSN: 239-08-9876

Service Date	Code	Description	Units	Fee Amt	Provider	Primary Diag.	Code Set
02/20/2015	99213	Office Outpt Est Level 3	1.00	\$110.00	KSA	401.9	ICD-9
01/27/2015	G0438U	Personal Prevention Plan Service U	1.00	\$140.00	KSA	401.9	ICD-9
01/17/2015	81002	Urnlrs Dip Stick/Tablet Rgnt Non-Auto W/O	1.00	\$10.00	KSA	401.9	ICD-9
01/17/2015	99212U	Office Outpt Est Level 2U	1.00	\$100.00	KSA	401.9	ICD-9
01/15/2015	99213U	Office Outpt Est Level 3U	1.00	\$110.00	KSA	401.9	ICD-9
01/15/2015	81002	Urnlrs Dip Stick/Tablet Rgnt Non-Auto W/O	1.00	\$10.00	KSA	401.9	ICD-9
12/04/2014	81000	Urnlrs Dip Stick/Tablet Rgnt Non-Auto Mic	1.00	\$25.00	KSA	401.9	ICD-9
12/04/2014	99212U	Office Outpt Est Level 2U	1.00	\$100.00	KSA	401.9	ICD-9
12/04/2014	99213U	Office Outpt Est Level 3U	1.00	\$110.00	KSA	401.9	ICD-9
12/04/2014	81000	Urnlrs Dip Stick/Tablet Rgnt Non-Auto Mic	1.00	\$25.00	KSA	401.9	ICD-9
12/04/2014	99213U	Office Outpt Est Level 3U	1.00	\$110.00	KSA	401.9	ICD-9
12/04/2014	81000	Urnlrs Dip Stick/Tablet Rgnt Non-Auto Mic	1.00	\$25.00	KSA	401.9	ICD-9
12/03/2014	81000	Urnlrs Dip Stick/Tablet Rgnt Non-Auto Mic	1.00	\$25.00	KSA	401.9	ICD-9
12/03/2014	99212U	Office Outpt Est Level 2U	1.00	\$100.00	KSA	401.9	ICD-9
12/01/2014	81000	Urnlrs Dip Stick/Tablet Rgnt Non-Auto Mic	1.00	\$25.00	KSA	401.9	ICD-9
12/01/2014	99212	Office Outpt Est Level 2	1.00	\$100.00	KSA	401.9	ICD-9
12/01/2014	81000	Urnlrs Dip Stick/Tablet Rgnt Non-Auto Mic	1.00	\$25.00	KSA	401.9	ICD-9
12/01/2014	99212U	Office Outpt Est Level 2U	1.00	\$100.00	KSA	401.9	ICD-9
11/30/2014	99213U	Office Outpt Est Level 3U	1.00	\$110.00	KSA	401.9	ICD-9
11/30/2014	81000	Urnlrs Dip Stick/Tablet Rgnt Non-Auto Mic	1.00	\$25.00	KSA	401.9	ICD-9
11/28/2014	99213U	Office Outpt Est Level 3U	1.00	\$110.00	KSA	401.9	ICD-9
11/28/2014	81000	Urnlrs Dip Stick/Tablet Rgnt Non-Auto Mic	1.00	\$25.00	KSA	401.9	ICD-9
11/27/2014	99213U	Office Outpt Est Level 3U	1.00	\$110.00	KSA	401.9	ICD-9
11/27/2014	81000	Urnlrs Dip Stick/Tablet Rgnt Non-Auto Mic	1.00	\$25.00	KSA	401.9	ICD-9
11/26/2014	99213U	Office Outpt Est Level 3U	1.00	\$110.00	KSA	401.9	ICD-9
11/26/2014	81000	Urnlrs Dip Stick/Tablet Rgnt Non-Auto Mic	1.00	\$25.00	KSA	401.9	ICD-9

### Service Inquiry Procedure History Tab

- To access Service Inquiry choose **Patient Management** from the Navigation tree>**Service Inquiry** folder>**Procedure History** tab.
- If you had a patient in view when you access Service Inquiry, than patient's information will display.
- You can scan for a Patient using the binoculars.
- Basic patient information displays
- The Procedure History screen displays each procedure that is a part of the Patient record by date of service.
- The screen display Service Date, Procedure Code, Description, Units, Fee Amt, Provider and Primary Diagnosis.

### Notes, Policies and Procedures

**TIP!** Click the headings bar to change the order of the display to ascending or descending order for each column

**TIP!** Your view can be displayed by Procedure Groups if master files are configured by procedure groups. Click on the down arrow under the Procedure Group heading.

**TIP!** You can right click on the service line item or multiple service dates and choose to **View** the history and from the view, you can Print or E-mail to the patient.



## 2-13 Patient Management>Service Inquiry>Procedure History Tab

**Sallie Medicare Pt# 20** ✕  
 Service Inquiry

Diagnosis History
Procedure History
HCC Diagnosis History

Patient:  🔍

Home Tel#: (919) 689-0987      Sex: Female  
 Work Tel#:      Birth Date: 01/15/1940  
 Cell#:      Age: 75 years  
 SSN: 239-08-9876

Procedure Group:  
 Requery

Service Date	Code	Description	Units	Fee Amt	Provider	Primary Diag.	Code Set
02/20/2015	99213	Office Outpt Est Level 3	1.00	\$110.00	KSA	401.9	ICD-9
01/27/2015	G0438U	Personal Prevention Plan Service U	1.00	\$140.00	KSA	401.9	ICD-9
01/17/2015	81002	Urnlrs Dip Stick/Tablet Rgnt Non-Auto W/O	1.00	\$10.00	KSA	401.9	ICD-9
01/17/2015	99212U	Office Outpt Est Level 2U	1.00	\$100.00	KSA	401.9	ICD-9
01/15/2015	99213U	Office Outpt Est Level 3U	1.00	\$110.00	KSA	401.9	ICD-9
01/15/2015	81002	Urnlrs Dip Stick/Tablet Rgnt Non-Auto W/O	1.00	\$10.00	KSA	401.9	ICD-9
12/04/2014	81000	Urnlrs Dip Stick/Tablet Rgnt Non-Auto Mic	1.00	\$25.00	KSA	401.9	ICD-9
12/04/2014	99212U	Office Outpt Est Level 2U	1.00	\$100.00	KSA	401.9	ICD-9
12/04/2014	99213U	Office Outpt Est Level 3U	1.00	\$110.00	KSA	401.9	ICD-9
12/04/2014	81000	Urnlrs Dip Stick/Tablet Rgnt Non-Auto Mic	1.00	\$25.00	KSA	401.9	ICD-9
12/04/2014	99213U	Office Outpt Est Level 3U	1.00	\$110.00	KSA	401.9	ICD-9
12/04/2014	81000	Urnlrs Dip Stick/Tablet Rgnt Non-Auto Mic	1.00	\$25.00	KSA	401.9	ICD-9
12/03/2014	81000	Urnlrs Dip Stick/Tablet Rgnt Non-Auto Mic	1.00	\$25.00	KSA	401.9	ICD-9
12/03/2014	99212U	Office Outpt Est Level 2U	1.00	\$100.00	KSA	401.9	ICD-9
12/01/2014	81000	Urnlrs Dip Stick/Tablet Rgnt Non-Auto Mic	1.00	\$25.00	KSA	401.9	ICD-9
12/01/2014	99212	Office Outpt Est Level 2	1.00	\$100.00	KSA	401.9	ICD-9
12/01/2014	81000	Urnlrs Dip Stick/Tablet Rgnt Non-Auto Mic	1.00	\$25.00	KSA	401.9	ICD-9
12/01/2014	99212U	Office Outpt Est Level 2U	1.00	\$100.00	KSA	401.9	ICD-9
11/30/2014	99213U	Office Outpt Est Level 3U	1.00	\$110.00	KSA	401.9	ICD-9
11/30/2014	81000	Urnlrs Dip Stick/Tablet Rgnt Non-Auto Mic	1.00	\$25.00	KSA	401.9	ICD-9
11/28/2014	99213U	Office Outpt Est Level 3U	1.00	\$110.00	KSA	401.9	ICD-9
11/28/2014	81000	Urnlrs Dip Stick/Tablet Rgnt Non-Auto Mic	1.00	\$25.00	KSA	401.9	ICD-9
11/27/2014	99213U	Office Outpt Est Level 3U	1.00	\$110.00	KSA	401.9	ICD-9
11/27/2014	81000	Urnlrs Dip Stick/Tablet Rgnt Non-Auto Mic	1.00	\$25.00	KSA	401.9	ICD-9
11/26/2014	99213U	Office Outpt Est Level 3U	1.00	\$110.00	KSA	401.9	ICD-9
11/26/2014	81000	Urnlrs Dip Stick/Tablet Rgnt Non-Auto Mic	1.00	\$25.00	KSA	401.9	ICD-9

### Service Inquiry Procedure History Tab

- To access Service Inquiry choose **Patient Management** from the Navigation tree>**Service Inquiry** folder>**Procedure History** tab.
- If you had a patient in view when you access Service Inquiry, than patient's information will display.
- You can scan for a Patient using the binoculars.
- Basic patient information displays
- The Procedure History screen displays each procedure that is a part of the Patient record by date of service.
- The screen display Service Date, Procedure Code, Description, Units, Fee Amt, Provider and Primary Diagnosis.

### Notes, Policies and Procedures

**TIP!** Click the headings bar to change the order of the display to ascending or descending order for each column

**TIP!** Your view can be displayed by Procedure Groups if master files are configured by procedure groups. Click on the down arrow under the Procedure Group heading.

**TIP!** You can right click on the service line item or multiple service dates and choose to **View** the history and from the view, you can Print or E-mail to the patient.

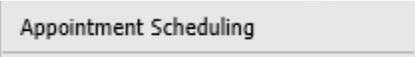
# Section 3 - Appointment Scheduling:

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### 3-1 Scheduling>Appointment Scheduling>Accessing the Patient Scheduling Tab

The screenshot displays the 'Patient Scheduling' interface. On the left is a 'Functions' sidebar with categories: Practice Management, Patient Management (with sub-items: Appointment Scheduling, Scheduling Activities, Scheduling Reports, Schedule Planning, Referrals), Financial Processing, Billing, Collections, Reporting, and System Administration. The main window has a title bar 'Patient Scheduling' and a sub-header 'Appointment Scheduling'. Below this are tabs for 'Patient Scheduling', 'Appointment Book', 'Appointment Management', and 'Appointment Activity'. The 'Patient Scheduling' tab is active, showing fields for Patient ID, Patient Name, and Patient Information (DOB, SSN, Sex, Age, Enterprise#, Home Tel#, Work Tel#, Cell#, Employer, DOB/Age, Referrals). It also includes financial fields (Self-Pay Balance, Medical Co-Pay, MR Loc, MR No), missed and late appointment counts, and a table with columns: Date, Time, Location, Department, Resource, Appt Type, Status. Below the table are buttons for 'Patient Info...', 'Referrals...', and 'Recalls...'. A 'Days and Times' section includes a date selector (04/27/2015), checkboxes for Any Day, Monday, Tuesday, Wednesday, Thursday, Friday, Saturday, and Sunday, and radio buttons for Any Time, AM, and PM. There are also 'Walk In' and 'Recurring...' buttons. At the bottom are 'Link Appts...', 'Open Times...', 'Use Book', and 'Cancel' buttons.

### Appointment Scheduling- Accessing the Patient Scheduling Tab

- On the left side of the Navigation Tree click on the **Scheduling** down circle sign  ,  
- Then SINGLE left click on the **Appointment Scheduling** folder 
- The first tab is the **Patient Scheduling** Tab

Under **Appointment Scheduling** you find 4 tabs. Many times a task can be performed from any one of the four tabs. Each one of the tabs, however, has its particular focus

- The **Patient Scheduling** and **Appointment Activity** tabs are focused on the selected Patient.
- The **Appointment Book** and the **Appointment Management** tabs are driven by the selection of Scheduling Location(s), Scheduling Department(s), and Resource(s).

**TIP!** Highlighting an appointment and using the **Enter** key on either the Appointment Book, the Appointment Management, and the Appointment Activity tabs will display a right click menu which also allows for branching to other scheduling functions.

### 3-2 Scheduling- Schedule using the Patient Scheduling Tab to schedule for an Established Patient

**Patient Scheduling** ✕  
 Appointment Scheduling

Patient Scheduling
Appointment Book
Appointment Management
Appointment Activity

Sallie Medicare

**DOB:** 01/15/1940      **Sex:** F  
**SSN:** 239-08-9876      **Age:** 75 years

Patient: Sallie Medicare ✕ 👤 🔍 📄

Sallie Medicare  
123 Main St  
Raleigh, NC 27615

Comment:

Patient#: 20  
Enterprise#:   
Home Tel#: (919) 689-0987  
Work Tel#:   
Cell#:   
Employer:   
DOB/Age: 01/15/1940 75 years      Missed Appts:   
Referrals:   
Late Appts:

Self-Pay Balance: \$0.00  
 Medical Co-Pay: \$0.00/\$0.00  
 MR Loc: 6FORKS  
 MR No: 205

Patient Info...

Referrals...

Recalls...

Date	Time	Location	Department	Resource	Appt Type	Status

Coverage Type: Medical ▼

Ailment:   🚑

Sched. Dept: Family Practice Associates ▼

Sched. Location:   ▼

Resource:   ▼

Appt Type:   ▼

Duration:   ⬆️⬆️⬆️

Refer. Doctor:   👤

Comments:

Days and Times

On or After: 04/27/2015 ▼

Any Day       Any Time

Monday       AM

Tuesday       PM

Wednesday

Thursday

Friday

Saturday      Walk In

Sunday      Recurring...

Link Appts...
Open Times...
Use Book
Cancel

## Scheduling- Patient Scheduling Tab

- **Patient Scheduling** tab is used when a patient is loaded in the child window and you want to schedule an appointment for that patient.
- Ability to search and schedule an appointment for a patient by defining criteria.
- Ability to go to the **Appointment Book** to schedule an appointment for the patient in focus.
- Ability to link to **Patient Information, Referrals** and **Recalls**.
- Ability to see the patient's current and future appointments.
- Ability to see Global Procedures and Expiration dates.

## Patient Scheduling Tab

## Screen divided into three (3) sections

### Top Patient Section

- Bring up patient using binoculars (or defaults in if patient is in Registration child window), or enter patient #/Tab, or Magic Wand to create new patient.
- Can use the “Memo Appt” icon  or **ALT/Shift/Down arrow** to make a non patient related appointment, such as a meeting.
- Patient information pulls in with patient and displays the Name, DOB, SSN, Sex and Age in the topmost area of the screen.
- Under the Patient prompt displays the Name, Address and comment entered into Registration>Patient tab.
- The top right of the screen displays- Enterprise #, phone numbers, Employer, DOB/Age, # of active Referrals, Self pay balance, Copay, Medical Rec Locator and #, Number of Missed appointment and # of Late appointments.

### Middle Section

- Displays patient’s current and future appointments but no past appointments.
- Three command buttons allow you to view/add/edit a **Referral**, access **Patient Information** screen or enter a **Recall**.
- **Patient Information** screen is like **Summary Tab** in **Registration** with balance information and policy information. This can be accessed by using **Alt/P**. From the screen you can bridge to **Registration** which opens a companion window to make changes to the **Registration** tabs of **Patient/Account/Policy/Additional**. You can also bridge to **Financial Inquiry** from within the **Patient Information** screen

### Bottom Section

- Prompts to complete information needed to schedule the appointment.
- **Coverage Type, Ailment, Sched Location, Sched Dept, Resource** (Sched Loc and Dept are required. Enter or use the down arrow to choose from a listing.

- **Resource** can be a person (Dr, NP, PA), place (X-ray room) or piece of equipment (scope). Enter the resource or use the drop down arrow to choose from the listing.
- You can group resources together to create a **Resource Group**. Use the “Spin Icons” to switch between entering a Resource or Resource Group.
- These fields can be defaulted by database or user/workstation using the **Ribbon Menu>Tools>Options**.
- **Appointment type** is mandatory. Duration fills in from appt type, but can be changed to identify the correct amount of time needed for the appointment.
- **Referring Dr-** May be a required on an appointment and will default the Referring Dr from Registration.
- **Comments-** A free text prompt that shows on an encounter, is linked to the appointment and prints on the schedule. 70 characters.
- **Days and Time-** Allows you to narrow the search criteria. On or After is a “jump off” day to search on or after this date. Can also define Day of the week, AM/PM designation. The defaults are today’s date, Any Day, Any Time.
- Click on **Open Times** to continue making the appointment.

### Notes, Policies, and Procedures

### 3-3 Scheduling- Open Appointment Scheduling and Registration Tabs

Open Window

Current Function: Appointment Scheduling

Current Patient: (no patient currently selected)

Select New Function: REG (Registration)

Category	Function Name	Code
Patient Management	Registration	REG
Patient Management	Notes	NOT
Patient Management	Documents	DOC
Patient Management	Service Inquiry	SIN
Patient Management	Automatic Registration	AUR
Patient Management	Allscripts PM Today	HNT
Scheduling	Appointment Scheduling	APS
Scheduling	Scheduling Activities	DAA
Scheduling	Scheduling Reports	SCR
Scheduling	Schedule Planning	SCP
Scheduling	Referrals	REF

Use Current Patient in New Function

Keep Appointment Scheduling Open

OK Cancel Help

Appointment Book  
Appointment Scheduling

Registration

<b>Appointment Scheduling Toggle to Registration</b> <ul style="list-style-type: none"><li>• To be able to toggle back and forth between scheduling and patient registration.</li><li>• Ability to have both “child” windows open and click between the two of them.</li><li>• While in <b>the Appointment Scheduling&gt;F9&gt;REG&gt;Click box Keep Appointment Scheduling Open&gt;OK</b></li><li>• Both folder tabs display in the top of the parent window so you can toggle/click back and forth between the functions.</li></ul>	<b>Notes, Policies and Procedures</b>
<b>3-4 Patient Scheduling Tab- Patient Lookup</b>	



### 3-5 Patient Scheduling Tab- Create a New Patient

#### Patient Lookup

Search By: Patient Name Search For: Kennedy  
Search By 2: Search For:  
Search By 3: Search For:

Save Search By Settings  
 Include Inactive Patients

Local Search Enterprise Search

Advanced Search

Patient Name:		Patient Number:	
Name (Soundex):		Guarantor Name:	
SSN:		Telephone No.:	
DOB:		Medical Rec No.:	
Enterprise Number:		Primary Certificate No.:	

Patient Additional Information

Field Name	Search For
Maiden Name	

Patient Name	Birth Date	Address	City/State/Zip
(no matching records)			

New Patient OK Cancel Help

#### Begin New Patient

Patient#:

SSN:

Last Name:  

First Name:  Initial:

Birth Date:

OK Cancel Help

### Patient Scheduling Tab- Create a New Patient

- Using the **Binoculars**, search for a patient. If the patient does not display in the grid, or no matching records are found, click on the **New Patient** command button.
- The **Begin New Patient** dialog box appears. Enter the Patient number or the system will auto assign a number when you click OK.
- Enter Last Name, First Name, Middle Initial and Birth Date. Fields in “vanilla” are required.
- The **Allscripts Companion Registration** window displays for you to complete the registration of the patient.
- Enter the registration information to comply with organization policies and **Save** in each tab.
- The system will return to the Patient Scheduling Tab, ready to continue with the appointment.
- Enter the appropriate information for the appointment.

### Notes, Policies and Procedures

### 3-6 Patient Scheduling Tab- Schedule Appointment for a Patient

**Patient Scheduling**  
Appointment Scheduling

**Patient Scheduling** | Appointment Book | Appointment Management | Appointment Activity

**Sallie Medicare**      DOB: 01/15/1940      Sex: F  
SSN: 239-08-9876      Age: 75 years

Patient:       Patient#: 20  
Sallie Medicare      Enterprise#:      Home Tel#: (919) 689-0987  
123 Main St      Work Tel#:      Cell#:      MR Loc: 6FORKS  
Raleigh, NC 27615      Employer:      MR No: 205

Self-Pay Balance: \$0.00  
Medical Co-Pay: \$0.00/\$0.00

Comment:      DOB/Age: 01/15/1940 75 years      Missed Appts:      Late Appts:      Referrals:      Referrals:      Referrals:

Date	Time	Location	Department	Resource	Appt Type	Status

Coverage Type:       Days and Times:      On or After:

Ailment:

Sched. Dept:

Sched. Location:

Resource:

Appt Type:

Duration:

Refer. Doctor:

Comments:

## Patient Scheduling Tab- Steps to Schedule an Appt

1. Scan for the patient using the **Binoculars** and pull the correct patient into focus or create a new patient.
2. Patient information display on the appointment screen.
3. Enter (or use the Down arrow and choose from the listing) the **Coverage Type, Sched Location, Sched Dept (these are required)**.
4. Enter (or use the Down arrow and choose from the listing) the **Resource** (or leave blank for all resources), or using the “spin box” the **Resource group**.
5. Enter (or use the Down arrow and choose from the listing) the **Appointment Type, Duration (these are required)**.
6. **Referring Dr** (if required or needed). This may default in if you have selected a Referring Doctor in registration when the patient was added.

7. Enter the **Comments** of the appointment.
8. Specify **Day and Times** to search for open appointments based on the patient’s needs. Default is today’s date and Any Day, Any Time.
9. Click on **Open Times**.

### Notes, Policies and Procedures

If you have set Scheduling Parameters, the Coverage Type, Sched Location, Sched Dept and Resource may populate in from those defaults.



### 3-8 Patient Scheduling Tab- Schedule Appointment Screen

**Schedule Appointment** [X]

A new appointment will be scheduled as follows:

Patient: Ariel Smith  
Appointment Type: Office Visit  
Duration: 15

Scheduling Location: Cary Office  
Scheduling Department: Sample Clinic  
Resource: Higgins, Henry

Appointment Date: Friday, 03/13/2009  
Time: 11:15 AM

Request Eligibility       Print Appt Reminder  
 Referral Required       Print Enc Form  
 Wait List       Print Med Rec Slip

OK Cancel Help

### Patient Scheduling Tab- Schedule Appointment Screen

- After choosing **Schedule** in the **Find Open Times** screen, the **Schedule Appointment** screen appears and will allow you to double check the accuracy of the appointment you are about to schedule.
- If a Referral is required for this appointment, check **Referral Required**. This will flag the appointment.
- If the patient wants an earlier appointment and wants to be put on a wait list, check the **Wait List** box.
- If you need to print an appointment reminder for the patient, check the **Print Appt Reminder** check box.
- If you need an encounter form make sure to check the box “**Print Enc Form**” check box. **(only available for today’s appts)**
- If you need to print a medical record slip, check the **Print Med Rec Slip** check box. **(only available for today’s appts)**
- If everything is correct on this screen, click on the **OK** command button.
- Appointment will be scheduled and you are returned to the Patient Scheduling Tab and appointment will display in the Appointment Book grid.

### Notes, Polices and Procedures

- If your site is using Electronic Eligibility, **Request Eligibility** will be available. If you need to request an insurance eligibility, check the **Request Eligibility** check box.
- If you mark an appointment as **Wait List**, an encounter number will not be created and the appointment will not pass to EHR. You will need to confirm the appointment and mark it as Wait List in **Appointment Detail** option.

### 3-9 Patient Scheduling Tab- Patient Info Command Button

**Patient Information for Harry H Smith**

Patient: Harry H Smith 124 Alley Road Hudson, NH 03062	Patient#: 210 Enterprise#: Sex: Male Birth Date: 10/23/1968 SSN: 122-44-5678 Usual Prov: Higgins, Henry Referring Dr: PCP: Bones, Barry Med. Rec. No:	Age:   40 years						
Home Tel#: (978) 555-7841 Work Tel#: Employer: Allscripts Comment:	Guarantor: Harry H Smith 124 Alley Road Hudson, NH 03062	Account#: 210 Account Type: Standard Home Tel#: (978) 555-7841 Work Tel#: Employer: Allscripts						
Policies								
<table border="1"> <thead> <tr> <th>Coverage</th> <th>Carrier</th> <th>Status</th> </tr> </thead> <tbody> <tr> <td>Primary</td> <td>BCBS</td> <td></td> </tr> </tbody> </table>	Coverage	Carrier	Status	Primary	BCBS		Subscriber: Harry H Smith Cert No.: 789675643 Grp Name: Grp No.: Plan / Co-Pay: \$10.00 / \$10.00	
Coverage	Carrier	Status						
Primary	BCBS							
Balances								
	Current	31-60 Days	61-90 Days	Over 90	Balance			
Self	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00			
Insur	\$0.00	\$0.00	\$0.00	\$15.80	\$15.80			
Collect	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00			
				Unassigned:	\$0.00			
				Total Balance:	\$15.80			

Registration...  
Financial Inquiry...  
OK Help

### Patient Scheduling Tab- Patient Info Command Button

- Ability to view demographic information entered for a patient in Registration, such as Name, Address, phone numbers, Employer, Comment, Patient numbers, Sex, DOB/Age, SSN, Usual Provider, Referring Dr, PCP and Medical Record number.
- Ability to view Guarantor information entered for a patient in Registration, such as Name, Address, Comment, Account number, Account type, phone numbers and Employer.
- Ability to view Insurance Policy information entered for a patient in Registration, such as all coverages, subscriber information, certificate/group numbers and Plans with copay.
- Ability to see Balance information for a patient for self, insurance and collection amounts in aging buckets, as well as any unassigned money. Balances over 90 days display in red.
- Click **OK** to close this screen.

### Notes, Policies and Procedures

You can “jump” to Registration by clicking on the **Registration** command button to open a companion Registration window.

You can “jump” to Financial Inquiry by clicking on the **Financial Inquiry** command button to open a companion Financial Inquiry window.

### 3-10 Patient Scheduling Tab Walk In Appointment

**Schedule (Walk In) Appointment** [X]

 A new Walk In appointment will be FORCED as follows:

Patient: Harry H Smith  
Appointment Type: Office Visit 15  
Duration: 15

Scheduling Location: Raleigh Office  
Scheduling Department: Sample Clinic  
Resource: Higgins, Henry

Appointment Date: Friday, 06/05/2009  
Time: 11:05 AM

Request Eligibility       Print Appt Reminder  
 Referral Required       Print Enc Form  
 Wait List       Print Med Rec Slip

OK    Cancel    Help

### Patient Scheduling Tab Walk In Appointment

- Ability to create a Walk In appointment at the current system time for the specified patient in focus.
- A Walk In appointment will be scheduled and display as a forced appointment in red on the Appointment book.
- Walk In appointments are automatically marked as Acknowledged.

### Notes, Policies and Procedures

### Steps to make a Walk In Appointment

1. Access the **Patient Scheduling** tab.
2. Search for the patient using the **Binoculars** and bring the correct patient into focus.
3. Enter the **Coverage Type, Sched Location, Sched Dept, Resource.**
4. Enter the **Appt Type** or use the down arrow and choose the correct appointment type from the listing for the Walk In appointment.
5. Enter the **Duration** of the Walk In appointment.
6. Enter the **Refer. Doctor** if appropriate.
7. Enter the **Comments** for this appointment.
8. Click on the **Walk In** command button on the Patient Scheduling screen or **Alt/K**
9. The **Schedule (Walk In) Appointment** confirmation dialog box will appear.
10. Review the available checkboxes, check any that apply.
11. Click on **OK.**
12. The appointment will be made at the current system time.

### 3-12 Patient Scheduling Tab Use Book Option

Patient Scheduling | **Appointment Book** | Appointment Management | Appointment Activity

Sched. Location: Raleigh Office | **Scheduling New Appt for Audrey Hope**  
 Sched. Dept: Sample Clinic | **Appt Type: Office Visit 15**  
 Resource: Higgins, Henry | Duration: 15 Days: (any)  Repeat  
 Date: 06/05/2009 | Add Day | Add Week | Clear | Cancel

Time	RALEIGH SAMPLE Higgins, Henry Fri 06/05/2009 Appts: 4	RALEIGH SAMPLE Higgins, Henry Mon 06/08/2009 Appts: 1
11:30	OV15 Hope, Audrey -	VISITS
11:35	VISITS	VISITS
11:45	VISITS	VISITS
12:00	DAY OFF	LUNCH
12:15	DAY OFF	LUNCH
12:30	DAY OFF	LUNCH
12:45	DAY OFF	LUNCH
01:00	DAY OFF	VISITS
01:15	DAY OFF	VISITS
01:30	DAY OFF	VISITS
01:45	DAY OFF	VISITS
02:00	DAY OFF	VISITS
02:15	DAY OFF	VISITS
02:30	DAY OFF	VISITS
02:45	DAY OFF	VISITS
03:00	DAY OFF	VISITS
03:15	DAY OFF	VISITS
03:30	DAY OFF	VISITS
03:45	DAY OFF	VISITS
04:00	DAY OFF	VISITS
04:15	DAY OFF	VISITS
04:30	DAY OFF	VISITS
04:45	DAY OFF	VISITS
05:00		VISITS

Day Type: Higgins Regular Day  
 Activity: Office Visits  
 From: 01:00 PM To: 07:00 PM Usual Duration: 15  
 Elig: ACUTE, FOLLOWUP, OV, PE, RECHECK

**Patient Scheduling Tab Use Book Option**

- There are times when you may want to view the appointment book before making a patient appointment and the **Use Book** option provides that capability.
- Ability to schedule an appointment from the **Appointment Book** tab based on information provided in the **Patient Scheduling** Tab.
- Ability to view appointment based Activity Restrictions if set up in the scheduling files.

**Notes, Policies and Procedures**

# Scheduling>Appointment Scheduling> Appointment Activity Tab

Appointment Activity [Sallie Medicare Pt# 20]

Appointment Scheduling

Patient: Sallie Medicare

Appointment Status:

- Scheduled
- Wait List
- Confirmed
- Acknowledged
- Bumped
- Cancelled
- No Show
- Med Rec Reqs

R	C	Date	Day	Time	Location	Department	Resource	Appt Type	Dur	Status	Co-Pay	Call Confirmation Result
		04/27/2015	Mon	09:00 AM	SIXFORK	FPA	Anderson MD, Kar	OV	15	Sched	\$0.00	

## Appointment Activity Tab

- This option is a total historical appointment history for a specific patient. There is no date range, resource, location or department selection criteria.
- View eight different patient appointment statuses; **Scheduled, Waitlist, Confirmed, Acknowledged, Bumped, Canceled, No Show, Med Rec Reqs**
- Ability to view the Appt details, view registration, view Incoming referrals, Schedule a new appt for the patient, enter a recall, Confirm/Acknowledge an appt, enter a start and end time for the appt, Waitlist, Cancel, No Show, Move, Bump appts and Print Encounters, Med Record requests/slips, or Appt reminders.
- Copay will also display in this tab. The amount displayed is based on the whether the patient has a specialist copay assigned to the policy and if the resource of the appointment is tied to a Provider marked as a specialist. If an unassigned payment is attached to the appt the amount will display in green.

## Steps to access Appointment Activity Tab

1. From the Navigation Tree
2. Click on **Scheduling** Folder + sign
3. Click on **Appointment Scheduling** Folder
4. Click on **Appointment Activity** Tab
5. Click on **Binoculars** to search for a patient

### 3-13 Appointment Activity Tab- Patient Lookup

**Patient Lookup** [X]

Search By: Patient Name [v] Search For: smi,sal

Search By 2: [v] Search For: [ ]

Search By 3: [v] Search For: [ ]

Save Search By Settings

Include Inactive Patients

[Local Search] [Enterprise Search]

Advanced Search

Patient Name: [ ] Patient Number: [ ]

Name (Soundex): [ ] Guarantor Name: [ ]

SSN: [ ] Telephone No.: [ ]

DOB: [ ] Medical Rec No.: [ ]

Enterprise Number: [ ] Primary Certificate No.: [ ]

Patient Additional Information

Field Name	Search For

Patient Name	Birth Date	SSN	Address	City
Smith, Sally M	01/01/1950	999-99-9999	123 Main St	Rale

[New Patient] [OK] [Cancel] [Help]

### Appointment Activity Tab- Patient Lookup

13. Enter the search criteria for the search (down arrow at Search By prompt).
14. Enter the search value in the Search For prompt
15. Click **Local Search**
16. Highlight the correct patient in the grid displayed at the bottom of the screen.
17. Click **OK**.

### Notes, Policies, Procedures

### Appointment Activity Tab

Appointment Status

- Scheduled
- Wait List
- Confirmed
- Acknowledged
- Bumped
- Cancelled
- No Show
- Med Rec Req

R	C	Date	Day	Time	Location	Department	Resource	Appt Type	Dur	Status	Co-Pay	Call Confirmation Result
		03/18/2013	Mon	10:05 AM	ALLSCR	ALLSCR	Livingston MD, Thc	OV	15	Sched	\$10.00	
		03/20/2013	Wed	03:30 PM	ALLSCR	ALLSCR	Livingston MD, Thc	NEWPAT	30	Sched	\$10.00	
		03/28/2013	Thu	01:15 PM	MAIN	ALLSCR	Jones MD, David	OV	15	Sched	\$30.00	
		04/01/2013	Mon	02:50 PM	ALLSCR	ALLSCR	Livingston MD, Thc	FOLLOWUP	15	Ack (Late)	\$10.00	
		04/05/2013	Fri	11:15 AM	ALLSCR	ALLSCR	Livingston MD, Thc	NEWPAT	30	Sched	\$10.00	
		04/09/2013	Tue	09:00 AM	ALLSCR	ALLSCR	Livingston MD, Thc	FOLLOWUP	15	Sched	\$10.00	
		04/10/2013	Wed	11:45 AM	ALLSCR	ALLSCR	Livingston MD, Thc	FOLLOWUP	15	Sched	\$10.00	
		04/11/2013	Thu	11:00 AM	ALLSCR	ALLSCR	Jones MD, David	NEWPAT				

Insurance: BCBS  
Coverage Type: Medical

## Appointment Activity Tab

- The **Appointment Status** section can be used to view certain appointment statuses of a patient's appointment history.
- Ex. If a provider wanted to see how many times a patient has cancelled or no showed the user can uncheck all the statuses except for Cancelled and No show.
- Appointments matching the criteria display in the grid.

### **R Column-** indicates Referral status colors

- **White/blank**=No referral required
- **Yellow Square**=Indicates that an appointment requires a referral which has not been received
- **Green Square**= Referral is attached or linked to the appointment

### **Co-Pay Column-** indicates the patient's copay

- The amount displayed is based on the whether the patient has a specialist copay assigned to their policy and if the resource of the appointment is tied to a Provider marked as a specialist.
- If there is an unassigned payment associated with the appt the amount will display in green.
- Hover on the copay to display the carrier and coverage type for the appt.

## Call Confirmation results Column

- Works in tandem with Televox iCall functionality or can be used manually if codes have been built in the Confirmation Result Code Maintenance file.
- Displays a chosen confirmation reason on a confirmed status appt.
- When the appointment's status is changed from Confirmed to another status, the field blanks out.

### **C Column-** indicates coverage status colors if using eligibility or recording manually in Appointment Detail option.

- **Green check mark** = Yes, the patient was covered at the time the inquiry was made
- **Red circle** = No, the patient was not covered for the scheduled service as of the time an inquiry was made
- **Red X** = Inactive. You must review the Eligibility History dialog to understand why the coverage is set to "Inactive." You may need to contact the Carrier to determine why
- **Red X** = Inactive. You must review the Eligibility History dialog to understand why the coverage is set to "Inactive." You may need to contact the Carrier to determine why
- **Green circle** - Received. An eligibility response was received from the payer
- **Yellow circle** - Exception. An Eligibility Response was received from the payer with an exception
- **Blank field** = No inquiry has been made relative to the coverage status for the appointment

## 3-14 Appointment Activity Tab R Click Options

**Appointment Activity [Sallie Medicare Pt# 20]**  
Appointment Scheduling

Patient: Sallie Medicare

Appointment Status

- Scheduled
- Wait List
- Confirmed
- Acknowledged
- Bumped
- Cancelled
- No Show
- Med Rec Req

R	C	Date	Day	Time	Location	Department	Resource	Appt Type	Dur	Status	Co-Pay	Call Confirmation Result
		04/27/2015	Mon	09:00 AM	SIXFORK	FPA	Anderson MD, Kare OV	15	Sch			

**Appointment Detail**

- Patient Information
- Register
- Incoming Referrals
- Schedule New Appt (This Patient)
- Recalls
- Confirm
- Acknowledge
- Wait List
- Started
- Check Out
- Cancel
- No Show
- Move Appointment
- Bump Appointment
- Reschedule Bumped Appointment
- Encounter Form
- Med Rec Request
- Med Rec Slip
- Appointment Reminder Document
- Request Eligibility
- View Eligibility Response

**Appointment Activity Tab R Click Options**

- Ability to view appointment details
- Ability to view the Patient Summary screen
- Ability to Cancel, record as No Show
- Ability to Move and Bump the patient’s appointment.
- Ability to Print Encounter
- Ability to do a demand Eligibility Request
- Ability to View the Eligibility Response

**Notes, Policies, Procedures**

### 3-15 Appointment Activity Tab- R Click Appointment Detail

Appointment Detail		Co-Pay: \$10.00	
Patient:	Cathy Capitation 1 Capitation Lane Milford, NC 03551	Patient#:	1180
Enterprise#:		Enterprise#:	
Self-Pay Balance:	\$0.00	Self-Pay Balance:	\$0.00
Med. Rec. No:		Med. Rec. No:	
Home Tel#:	(302) 555-6666	Home Tel#:	(302) 555-6666
Work Tel#:		Work Tel#:	
Employer:		Employer:	
Birth Date:	02/15/1982	Age:	29 years
Comment:			
Date/Time:	04/13/2011 10:00 AM	Status:	<input type="radio"/> Scheduled <input checked="" type="radio"/> Wait List <input checked="" type="radio"/> Confirmed <input type="radio"/> Acknowledged <input type="radio"/> Bumped <input type="radio"/> Cancelled <input type="radio"/> No Show <input type="radio"/> Med Rec Request
Sched Loc:	NASHUA QA MEDICAL PRACTICE	Ack. Time In:	
Sched Dept:	OFFICE	Started:	
Resource:	FEELGOOD, MARK A MD	Check Out:	
Appt Type:	Follow Up Visit	Confirmation Result:	Answered - Confirmed Left Message
Duration:	15	Cancel Reason:	
Encounter:	Not printed Encounter# 6200	Coverage Type:	Medical
Med Rec Slip:	Not printed	Referring Dr:	
Booked By:	csi on 04/13/2011 08:43 AM	Referrals...	No Referral
Confirmed By:	csi on 04/18/2011 01:48 PM	<input type="checkbox"/> Referral Required	Coverage: <input type="text"/>
Ack. By:			
Cancelled By:			
Request Eligibility...			
Comments:			
<input type="button" value="Enc. Form"/> <input type="button" value="Med. Rec. Slip"/> <input type="button" value="Appt. Remind"/> <input type="button" value="Move Appt"/> <input type="button" value="Patient Info..."/> <input type="button" value="Register"/> <input type="button" value="OK"/> <input type="button" value="Cancel"/> <input type="button" value="Help"/>			

<p><b>Appointment Activity Tab- R Click Appt Detail</b></p> <ul style="list-style-type: none"> <li>• Ability to mark <b>Started</b> time or <b>Check Out</b> time</li> <li>• Ability to change the <b>Status</b> of the appt and mark it as <b>Confirmed</b> (with result), <b>Acknowledged</b>, <b>Cancelled</b> (with Cancel reason), <b>No Show</b></li> <li>• Ability to <b>Waitlist</b> or <b>Bump</b> the appointment</li> <li>• Ability to add and attach an Incoming Referral</li> <li>• Ability to print an <b>Encounter Form, Med Record Slip, Appt reminder</b></li> <li>• Ability to <b>Move</b> an appointment.</li> <li>• Ability to <b>Request Eligibility</b> if the organization is signed up for it.</li> <li>• Ability to add/edit <b>Comment</b> of the appointment.</li> <li>• Ability to “jump” to <b>Patient Info</b>.</li> </ul>	<p><b>Notes, Policies, Procedures</b></p> <ul style="list-style-type: none"> <li>• View the Encounter # and user who booked/confirmed/ acknowledge/ canceled the appt.</li> <li>• Click on the appropriate status of the appointment.</li> <li>• Click on the down arrow at the Started or Check Out prompts to automatically record the current time.</li> <li>• Type in the comments field to add or edit comments.</li> <li>• Choose a coverage type for this appointment if entering manually.</li> <li>• Click on the various Print command buttons to display the printer screen.</li> <li>• Click on Referrals, Request Eligibility or Patient Info command buttons to access those options.</li> <li>• Click <b>OK</b> to save and close the screen.</li> </ul>
<p><b>3-16 Appointment Activity Tab-R Click Patient Information</b></p>	

**Patient Information for Ariel Smith**

Patient: Ariel Smith  
250 Highway Drive  
Highland City, OH 88999

Home Tel#: (203) 288-8888  
Work Tel#:  
Employer:  
Comment: Friend of the Dr. Livingston

Patient#: 500  
Enterprise#: 500  
Sex: Female  
Birth Date: 01/17/1991      Age: 18 years  
SSN: 789-65-4123  
Usual Prov: Livingston, Thomas  
Referring Dr: Livingston, Thomas  
PCP: Livingston, Thomas  
Med. Rec. No:

---

Guarantor: Ariel Smith  
250 Highway Drive  
Highland City, OH 88999

Account#: 500  
Account Type: Standard  
Home Tel#: (203) 288-8888  
Work Tel#:  
Employer:

Comment: Pays on time

---

Policies

Coverage	Carrier	Status
Primary	Cigna Healthcare	
Other	WC Kemper Insurance	

Subscriber: Ariel Smith  
Cert No.: 789-65-4123  
Grp Name:  
Grp No.:  
Plan/Co-Pay: \$10.00 / \$10.00

---

Balances

	Current	31-60 Days	61-90 Days	Over 90	Balance
Self	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Insur	\$0.00	\$0.00	\$122.00	\$0.00	\$122.00
Collect	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
				Unassigned:	\$0.00
				Total Balance:	\$122.00

Registration...  
Financial Inquiry...  
OK      Help

### Appointment Activity Tab- R Click Patient Information

- Displays the **Registration Summary** Screen
- Displays the Patient's address, phone #'s, Employer, Comment, Sex, DOB, SSN, Guarantor, Ins Carriers, Balances
- Ability to access **Registration**
- Ability to access **Financial Inquiry**
- Click **OK** to close the screen.

### Notes, Policies, Procedures

### 3-17 Appointment Activity Tab-R Click Cancel/No Show

**Cancel Appointment**

The following appointment will be Cancelled:

Patient: Ariel Smith  
Appointment Type: Office Visit  
Duration: 15

Scheduling Location: Raleigh Office  
Scheduling Department: Sample Clinic  
Resource: Higgins, Henry

Appointment Date: 02/26/2008  
Time: 10:00 AM

Request Eligibility

Cancel Reason: Patient Cancelled

OK Cancel Help

**Set Appointment Status to No Show**

The following appointment will be set to No Show Status:

Patient: Ariel Smith  
Appointment Type: Office Visit  
Duration: 15

Scheduling Location: Raleigh Office  
Scheduling Department: Sample Clinic  
Resource: Higgins, Henry

Appointment Date: 02/26/2008  
Time: 10:00 AM

Request Eligibility

OK Cancel Help

#### Appointment Activity Tab- R Click Cancel

- Ability to Cancel the appointment
- Enter the Cancel Reason or use drop down arrow and chose from the list.
- Click **OK**.

#### Notes, Policies, Procedures

#### Appointment Activity Tab- R Click No Show

- Ability to record the appointment as a No Show
- Click **OK**.

#### Notes, Policies, Procedures

### 3-18 Appointment Activity Tab- Click R Move a Patient's appointment

Patient Scheduling | 
 Appointment Book | 
 Appointment Management | 
 **Appointment Activity**

Patient:

Appointment Status  
 Scheduled     Cancelled  
 Wait List     No Show  
 Confirmed     Med Rec Reqs  
 Acknowledged  
 Bumped

R	C	Date	Day	Time	Location	Department	Resource	Appt Type	Dur	Status	Co-Pay	Call Confirmation Result
		04/27/2015	Mon	09:00 AM	SIXFORK	FPA	Anders...	MD	15	Sched	\$0.00	

**Appointment Detail**  
 Patient Information  
 Register  
 Incoming Referrals  
 Schedule New Appt (This Patient)  
 Recalls  


---

 Confirm  
 Acknowledge  
 Wait List  


---

 Started  
 Check Out  


---

 Cancel  
 No Show  
**Move Appointment**  
 Bump Appointment  
 Reschedule Bumped Appointment  


---

 Encounter Form  
 Med Rec Request  
 Med Rec Slip  
 Appointment Reminder Document  


---

 Request Eligibility  
 View Eligibility Response

<b>Appointment Activity Tab- Steps to Move an Appt</b>	<b>Notes, Policies, Procedures</b>
<ol style="list-style-type: none"><li>1. If a patient calls to move the appointment</li><li>2. Search for the patient</li><li>3. Highlight the appointment that needs to be moved</li><li>4. Right click on the appointment</li><li>5. Select <b>Move</b> Appointment from the drop down menu</li></ol> <p>*This will action will revert back to the <b>Appointment Activity</b> tab and will display the patient's new appointment information and canceled appointment if that <b>Status</b> is checked.</p>	

<b>3-19 Appointment Activity Tab- Move a Patient's appointment using Open Times Option</b>
--

Patient Scheduling | Appointment Book | Appointment Management | Appointment Activity

---

**Sallie Medicare**      **DOB:** 01/15/1940      **Sex:** F  
**SSN:** 239-08-9876      **Age:** 75 years

---

Patient:       Patient#: 20      Self-Pay Balance: \$0.00  
 Sallie Medicare      Enterprise#:      Medical Co-Pay: \$0.00/\$0.00  
 123 Main St      Home Tel#: (919) 689-0987      MR Loc: 6FORKS  
 Raleigh, NC 27615      Work Tel#:      MR No: 205  
 Cell#:      Employer:      Missed Appts: 0  
 Comment:      DOB/Age: 01/15/1940 75 years      Late Appts: 0  
 Referrals: 0

Date	Time	Location	Department	Resource	Appt Type	Status

---

Coverage Type:       Days and Times  
 Ailment:       On or After:   
 Sched. Dept:        Any Day       Any Time  
 Sched. Location:        Monday       AM  
 Resource:        Tuesday       PM  
 Appt Type:        Wednesday  
 Duration:        Thursday  
 Refer. Doctor:        Friday  
 Comments:        Saturday        
     Sunday     

Moving Appointment from: 04/27/2015 9:00 am                       

### Appointment Activity Tab- Steps to Move an Appt

1. Set the correct new Days and Times.
2. Choose **Open Times** command button
3. Highlight the correct appointment Date and Time when the schedule displays
4. Click the **Schedule** command button
5. Confirm the Appointment
6. Click on **OK** command button.

### Notes, Policies, Procedures



## Appointment Activity Tab- Move a Patient's appointment using Use Book Option

Patient Scheduling		Appointment Book		Appointment Management		Appointment Activity															
<b>Sallie Medicare</b>				DOB: 01/15/1940	Sex: F																
				SSN: 239-08-9876	Age: 75 years																
Patient:	Sallie Medicare	Patient#:	20	Self-Pay Balance:	\$0.00	Medical Co-Pay:	\$0.00/\$0.00														
	Sallie Medicare	Enterprise#:		MR Loc:	6FORKS	MR No:	205														
	123 Main St	Home Tel#:	(919) 689-0987																		
	Raleigh, NC 27615	Work Tel#:																			
Comment:		Cell#:																			
		Employer:		Missed Appts:	0	Late Appts:	0														
		DOB/Age:	01/15/1940 75 years																		
		Referrals:	0																		
Patient Info...	<table border="1"> <thead> <tr> <th>Date</th> <th>Time</th> <th>Location</th> <th>Department</th> <th>Resource</th> <th>Appt Type</th> <th>Status</th> </tr> </thead> <tbody> <tr> <td colspan="7"> </td> </tr> </tbody> </table>							Date	Time	Location	Department	Resource	Appt Type	Status							
Date	Time	Location	Department	Resource	Appt Type	Status															
Referrals...																					
Recalls...																					
Coverage Type:	Medical	Ailment:		Days and Times																	
Sched. Dept:	Family Practice Associates	Sched. Location:	Six Forks Office	On or After:	04/28/2015																
Resource:	Anderson MD, Karen S	Appt Type:	Office Visit	<input checked="" type="checkbox"/> Any Day	<input checked="" type="radio"/> Any Time																
Duration:	15	Refer. Doctor:		<input type="checkbox"/> Monday	<input type="radio"/> AM																
Comments:	abd pain			<input type="checkbox"/> Tuesday	<input type="radio"/> PM																
				<input type="checkbox"/> Wednesday																	
				<input type="checkbox"/> Thursday																	
				<input type="checkbox"/> Friday																	
				<input type="checkbox"/> Saturday	Walk In																
				<input type="checkbox"/> Sunday	Recurring...																
Moving Appointment from: 04/27/2015 9:00 am				Link Appts...	Open Times...	Use Book	Cancel														

<b>Appointment Activity Tab- Steps to Move an Appt</b>  <ol style="list-style-type: none"><li>1. Set the correct new Days and Times.</li><li>2. Choose <b>Use Book</b> command button</li><li>3. Selecting this action will prompt the <b>Appointment Book</b> tab</li><li>4. Select the correct appointment time by right clicking on the appointment time</li><li><b>5. Select Move to this Time Slot</b></li><li>6. Confirm the Appointment</li><li>7. Click on <b>OK</b> command button.</li></ol>	<b>Notes, Policies, Procedures</b>
--	------------------------------------

<b>3-21 Appointment Activity Tab-Print Encounter/Appt Reminder/Medical Record Request or Slip</b>
---

**Appointment Activity [Sallie Medicare Pt# 20]**  
Appointment Scheduling

Patient: Sallie Medicare

Appointment Status

- Scheduled
- Wait List
- Confirmed
- Acknowledged
- Bumped
- Cancelled
- No Show
- Med Rec Reqs

R	C	Date	Day	Time	Location	Department	Resource	Appt Type	Dur	Status	Co-Pay	Call Confirmation Result
		04/27/2015	Mon	09:00 AM	SIXFORK	FPA	Anderson MD, Kar	OV	15	Sched	\$0.00	

**Appointment Detail**

- Patient Information
- Register
- Incoming Referrals
- Schedule New Appt (This Patient)
- Recalls
- Confirm
- Acknowledge
- Wait List
- Started
- Check Out
- Cancel
- No Show
- Move Appointment
- Bump Appointment
- Reschedule Bumped Appointment
- Encounter Form
- Med Rec Request
- Med Rec Slip
- Appointment Reminder Document
- Request Eligibility
- View Eligibility Response

**Appointment Activity Tab- R Click>Encounter Form**

- Ability to Print a Demand Encounter
- Click on Encounter Forms and choose the correct printer.
- Click **OK**.

**Appointment Activity Tab- R Click>Med Req Request**

- Ability to Print a Medical Records Request
- Click on Med Rec Request and choose the correct printer.
- Click **OK**.

**Appointment Activity Tab- R Click>Med Rec Slip**

- Ability to print a Medical Records Slip.
- Click on Med Rec Slip and choose the correct printer.
- Click **OK**.

**Appointment Activity Tab- R Click>Appointment Reminder Document**

- Ability to print an Appointment reminder.
- Click on Appointment Reminder Document and choose the correct printer.
- Click **OK**.

### 3-22 Appointment Activity Tab-Request Eligibility/View Eligibility Response

Appointment Activity [Sallie Medicare Pt# 20] ⊗  
 Appointment Scheduling

Patient: Sallie Medicare ⊗ ⊗

Appointment Status

- Scheduled
- Wait List
- Confirmed
- Acknowledged
- Bumped
- Cancelled
- No Show
- Med Rec Reqs

R	C	Date	Day	Time	Location	Department	Resource	Appt Type	Dur	Status	Co-Pay	Call Confirmation Result
		04/27/2015	Mon	09:00 AM	SIXFORK	FPA	Anderson MD, Kar, OV		15	Sched		

**Appointment Detail**

Patient Information

Register

Incoming Referrals

Schedule New Appt (This Patient)

Recalls

---

Confirm

Acknowledge

Wait List

---

Started

Check Out

---

Cancel

No Show

Move Appointment

Bump Appointment

Reschedule Bumped Appointment

---

Encounter Form

Med Rec Request

Med Rec Slip

Appointment Reminder Document

---

Request Eligibility

View Eligibility Response

#### Appointment Activity Tab- R Click>Request Eligibility

- Ability to do a demand Eligibility request
- System displays screen showing request has been sent
- Click **Save to close**.

#### Appointment Activity Tab- View Eligibility Request

- Ability to view the Eligibility Response
- Click on response, then R click to View Eligibility
- Click **OK to close**.

## Appointment Activity Tab R Click>View Eligibility Response

**Eligibility History** X

Patient: <span style="background-color: gray; color: gray;">[REDACTED]</span>  Home Tel#: <span style="background-color: gray; color: gray;">[REDACTED]</span> Work Tel#: <span style="background-color: gray; color: gray;">[REDACTED]</span> Date of Birth: <span style="background-color: gray; color: gray;">[REDACTED]</span> SSN: <span style="background-color: gray; color: gray;">[REDACTED]</span>	Patient#: 1612190 Usual Provider: Siegelbaum, Marc H Referring Dr: Raymond Nze Prim Care Phys: Raymond Nze Carrier: BCBS National Accounts Plan: \$10 Co-Pay: \$10.00
---	---

Date	Operator	Carrier	Eff Date	Exp Date	Subscriber
- 11/13/2009 02:08 pm	csi				
11/13/2009 03:07 pm		CAREFIRST BLUECROSS BLUESH			
+ 11/05/2009 02:08 pm	csi				
+ 09/18/2009 02:02 pm	csi				

Eligibility Response

Patient: <span style="background-color: gray; color: gray;">[REDACTED]</span> Carrier: CAREFIRST BLUECROSS BLUESHIELD Plan: MD PPO Group Name: BALTIMORE CITY PUBLIC SCHOOLS Group No: 001901200VC9R Effective Date: Expiration Date: Member No: BYG810843884 Prim Care Phys: Exception Comment:	Subscriber: <span style="background-color: gray; color: gray;">[REDACTED]</span>  Date of Birth: <span style="background-color: gray; color: gray;">[REDACTED]</span> SSN: Patient's Relationship: Unknown
---	--

OK
Help

### **Appointment Activities- View Eligibility Responses /Eligibility History Dialog**

- The **Eligibility History Dialog** is accessible from the R click option in **Appointment Scheduling**
- The **Eligibility** request/response options only appears when an Active 271 Eligibility Response IB Format exists in the Allscripts Interface Engine.
- If there is not an exception on the response line, you can right-click the response line and select **Eligibility Response** to print, preview, or export the **Eligibility Response** for the patient which may contain their benefit information.

- If a Response has been received for a Request, the first column in the grid displays a "+" which indicates that a Response exists and that Response line is hidden.
- To view the Response row, click the "+" at which point it becomes a "-" and the Response line now displays below the Request to which it corresponds
- Eligibility Responses are accessed through the **Eligibility History Dialog** by right clicking on the Response Line then clicking on **Eligibility Response**.
- The information available in an eligibility response depends largely on the information that the carrier sends back in the file.
- Eligibility Responses can be Printed, Previewed, or Exported

# Section 2 - Financial Inquiry:

---

## 4-1 Financial Processing > Financial Inquiry Overview

**Sallie Medicare Pt# 20** ✕  
Financial Inquiry

**Account Inquiry** Payment History

**Sallie Medicare** DOB: 01/15/1940    Sex: F  
SSN: 239-08-9876    Age: 75 years

Patient:  Patient#: 20    DOB: 01/15/1940

Acct Type: Standard Guarantor: Sallie Medicare

Comments: Home Tel#: (919) 689-0987

Work Tel#:   
Cell#:

	Current	31-60 Days	61-90 Days	Over 90	Balance
Self	\$5.00	\$0.00	\$0.00	\$0.00	\$5.00
Insur	\$1,442.00	\$0.00	\$110.00	\$0.00	\$1,552.00
Collect	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
				Unassigned:	\$0.00
				Total Balance:	\$1,557.00

All Providers

All Departments

Patient Items

Open Items Only

All Ages/Payers

Service Date	Voucher#	Provider	Chg Amt	Pmts/Adjs	Balance	Payor	Coverage Type	AA	Billed Date	Age
11/26/2014	120	KSA	\$25.00	\$21.00	\$4.00	BCBS	Medical	Y		0
11/26/2014	130	KSA	\$110.00	\$92.00	\$18.00	BCBS	Medical	Y		0
11/27/2014	100	KSA	\$25.00	\$0.00	\$25.00	MCR	Medical	Y		0
11/27/2014	110	KSA	\$110.00	\$0.00	\$110.00	MCR	Medical	Y		0
11/28/2014	70	KSA	\$25.00	\$0.00	\$25.00	MCR	Medical	Y		0
11/28/2014	80	KSA	\$110.00	\$0.00	\$110.00	MCR	Medical	Y		0
11/30/2014	20	KSA	\$25.00	\$0.00	\$25.00	MCR	Medical	Y		0
11/30/2014	30	KSA	\$110.00	\$0.00	\$110.00	MCR	Medical	Y		0
12/01/2014	50	KSA	\$125.00	\$0.00	\$125.00	MCR	Medical	Y		0
12/01/2014	60	KSA	\$125.00	\$0.00	\$125.00	MCR	Medical	Y		0
12/03/2014	160	KSA	\$125.00	\$0.00	\$125.00	MCR	Medical	Y		0
12/04/2014	140	KSA	\$25.00	\$0.00	\$25.00	MCR	Medical	Y		0
12/04/2014	150	KSA	\$110.00	\$0.00	\$110.00	MCR	Medical	Y		0
12/04/2014	170	KSA	\$25.00	\$0.00	\$25.00	MCR	Medical	Y		0
12/04/2014	180	KSA	\$110.00	\$0.00	\$110.00	MCR	Medical	Y		0
12/04/2014	190	KSA	\$125.00	\$120.00	\$5.00	Self-Pay		N		0
01/15/2015	220	KSA	\$10.00	\$0.00	\$10.00	MCR	Medical	Y		0

## Financial Inquiry

- Account Inquiry is a tool intended to provide you with quick access to a Patient or Guarantor's financial information.
- From the Navigation Pane click on **Financial Processing** > then click on **Financial Inquiry** folder or **(F9 + FIN)**.
- Provides information on a patient's account balance on the **Account Inquiry** Tab.
- Provides a history of the patient's payments on the **Payment History** Tab.
- The buckets that display can be determined by the client, 90 days and older display in Red.
- There is no ability to see just credit or overpaid items- credits will display in open item view.

## Notes, Policies and Procedures

To view voided vouchers or vouchers with voided transactions you must select the Query filter option "Void, Paid, Open Items."

Right click menu items are available from the voucher grid.

**TIP!** Like any Windows grid you can change the order of the display by clicking the column title. For example, to show vouchers in ascending order by charge amount click the column title "Chg Amt." Click the column title again to order the display by charge amount from highest to lowest charge amount. The default view is to list the vouchers by service date from the earliest to the most recent.

## 4-2 Financial Processing>Financial Inquiry>Account Inquiry Tab

**Account Inquiry** Payment History

**Ariel Smith** DOB: 01/17/1991 Sex: F  
SSN: 789-65-4123 Age: 18 years

Patient:    Patient#: 500 DOB: 01/17/1991  
 Guarantor: Ariel Smith  
 Acct Type: Standard Home Tell#: (203) 288-8888  
 Comments: Pays on time Work Tell#:

	Current	31-60 Days	61-90 Days	Over 90	Balance
Self	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Insurance	\$0.00	\$0.00	\$0.00	\$122.00	\$122.00
Collect	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
				Unassigned:	\$0.00
				<b>Total Balance:</b>	<b>\$122.00</b>

Higgins, Henry   
 Sample Clinic   
 Patient Items   
 Open Items Only   
 All Ages/Payers

Service Date	Voucher#	Provider	Chg Amt	Prct/Adjs	Balance Payor	AA	billed Date	Age
07/23/2008	2280	HIGGINS	\$61.00	\$0.00	\$61.00	CIGNA	Y	01/11/2009 124
07/24/2008	2400	HIGGINS	\$61.00	\$0.00	\$61.00	CIGNA	Y	01/11/2009 124

### Financial Inquiry Account Inquiry Tab

- Choose the way you would like to **search for your patient** by clicking on the spin box to the right of Patient prompt. Options are Patient, Guarantor, Claim, Voucher, Invoice or Reference. (*typically you will choose Patient when looking up a patient balance*)
- In the **aging grid** in the far right column the balance for **Self**, **Insurance** and **Collection** display in defined aging buckets. In that grid on the last line on the left side the **Unassigned** and **Total Balance** is available for quick review. (Area in red on picture)
- You can also constrain to see a specific details of a patient's accounts by utilizing the query filter options on the right side of the grid (area in yellow), these will allow you to see only the balances for the constraints chosen > once you choose your constraints click the

- The grid (area in purple) on the bottom ½ of the screen displays the details of the items from the constraints (it defaults to display only the Open items, for all Providers and Departments, All Ages/Payers).

### Notes, Policies and Procedures

<p><b>Requery</b> button (area in green) on the right.</p>	
--	--

<p><b>Financial Inquiry Account Inquiry Tab</b></p>	
<p><b>Understanding the Aging Grid-</b> The aging grid populates detail by aging bracket and total balance related to the Patient or Account's open items.</p> <ul style="list-style-type: none"> <li>• <b>Self</b> - includes balances for open item Self-Pay vouchers (Credit Balances display between parentheses.)</li> <li>• <b>Insur</b> - includes balances for open item insurance vouchers regardless of the setting of the accept assignment flag on the voucher. Excluded from these totals are insurance vouchers out to a Carrier flagged as a Collection Agency. (Credit Balances display between parentheses.)</li> <li>• <b>Collect</b> - includes the balances for open item insurance vouchers out to a Carrier flagged as a Collection Agency.</li> <li>• <b>Co-Ins Due</b> - displays the total for co-pay amounts due on insurance vouchers when the <b>Uncollected Co-Pay</b> button is used on the Self-Pay dialog in Charge Entry or A Co-Pay amount is entered without entering a payment amount in the Co-Pay dialog on the Edits tab.</li> <li>• <b>Unassigned</b> - unassigned amount that is associated with the Patient or Guarantor (is considered a credit and is displayed within parentheses).</li> <li>• <b>Total Balance</b> - equal to the sum of the balances for Self Pay, Insurance and Collection minus the Unassigned amount.</li> </ul> <p><b>TIP!</b> Click a row heading to display select vouchers in the grid. For example, to display only Self-Pay vouchers click <b>Self</b>.</p> <p><b>Setting Query Filters-</b> One of the ways you can control which vouchers load into the voucher lines grid is by setting query filters. The grid containing the query option combo boxes is located to the right of the Aging Grid.</p>	<ul style="list-style-type: none"> <li>• Use the drop down to constrain on All Ages/Payors, Over 30 days, Over 60 days, Over 90 days, Self Pay Items, Insurance Items, Collection Items.</li> </ul> <p><b>Note:</b> Always click on the <b>Requery</b> command button after making selections.</p> <p><b>Understanding the Voucher Lines-</b> The voucher lines grid used in Account Inquiry holds the results of a query or requery.</p> <ul style="list-style-type: none"> <li>• The first column in the transaction grid may display a voucher flag. A yellow flag indicates Not updated, A green flag indicates Updated Charges with payments not updated, a red flag indicates a voided voucher, a purple flag indicates a voided transaction</li> <li>• Each line contains the following detail: Voucher Status flag, Service Date, Voucher # ,Patient (when detail is loaded by Guarantor), Provider, Chg Amt, Pmts./Adjs, Balance, Payor (Current Remittor), Payor (Current Remittor), AA (Current Accept Assignment Flag setting on voucher, Billed Date (most recent),Age (of the balance due), Statement Message, Claim Message, Patient, Location, Department, Place of Svc, Referring Dr, Batch #, Voucher Status, Date Updated, Responsible Party, Co-Ins Amt, Co-pay paid, Claim # ( "0" means the voucher has not yet been billed), Bill Media (current), Billing Prov, Local Use Text, Original Voucher/Payor/ Bill Date/Billing Media and Invoice # - For Occupational Medicine Services.</li> <li>• To view the detail in the columns to the right you must use the horizontal scroll bar.</li> </ul> <p><b>Right Click Menu Options</b></p>

- The screen opens preloaded with the Patient or Guarantor items displaying. By default, vouchers are loaded with all Providers and Departments, Patient Items (or Account items in Collections/Guarantor chosen), Open Items Only and All Ages/Payers.
- Use the drop down arrow to display a listing and choose from the listing to constrain on Providers/Departments.
- Use the drop down arrow to display Open Items Only/Paid & Open Items/Void, Paid, Open Items.

- **View-** To view the detail of a voucher
- **Change Options and View-** To set criteria and view voucher detail
- **View Claim Status-** Available only when the claim has been given a Claim Status Category Code or Claims Status Code
- **View Elec Remit History-** Only enabled when the selected claim has electronic remittance records that were processed into a batch within Allscripts PM. The option is available as soon as the electronic remit payments are processed into a batch.

### 4-3 Financial Inquiry > Viewing/Printing an Account Inquiry

**Sallie Medicare Pt# 20** ⊗  
 Financial Inquiry

**Account Inquiry**
Payment History

**Sallie Medicare**

Patient:  ⊗

Acct Type: Standard  
Comments:

DOB: 01/15/1940      Sex: F  
SSN: 239-08-9876      Age: 75 years

Patient#: 20      DOB: 01/15/1940  
Guarantor: Sallie Medicare  
Home Tel#: (919) 689-0987  
Work Tel#:      Cell#:

	Current	31-60 Days	61-90 Days	Over 90	Balance
Self	\$5.00	\$0.00	\$0.00	\$0.00	\$5.00
Insur	\$1,442.00	\$0.00	\$110.00	\$0.00	\$1,552.00
Collect	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
				Unassigned:	\$0.00
				<b>Total Balance:</b>	<b>\$1,557.00</b>

All Providers All Departments Patient Items Open Items Only All Ages/Payers

Service Date	Voucher#	Provider	Chg Amt	Pmts/Adjs	Balance	Payor	Coverage Type	AA	Billed Date	Age
11/26/2014	120	KSA	\$25.00	\$21.00	\$4.00	R CBS	Medical	Y		0
11/26/2014	130	KSA	\$110.00			R	Medical	Y		0
11/27/2014	100	KSA	\$25.00			R	Medical	Y		0
11/27/2014	110	KSA	\$110.00			R	Medical	Y		0
11/28/2014	70	KSA	\$25.00			R	Medical	Y		0
11/28/2014	80	KSA	\$110.00			R	Medical	Y		0
11/30/2014	20	KSA	\$25.00			R	Medical	Y		0
11/30/2014	30	KSA	\$110.00			R	Medical	Y		0
12/01/2014	50	KSA	\$125.00	\$0.00	\$125.00	MCR	Medical	Y		0
12/01/2014	60	KSA	\$125.00	\$0.00	\$125.00	MCR	Medical	Y		0

#### Financial Inquiry Viewing/Printing an Account Inquiry

- From within the **Account Inquiry** screen **right click** on the item that you would like to print the detail for, then click **View**. This will launch you into a viewable screen of the Account Inquiry. From within the view screen you can choose how much detail for an item you would like to see.
- **NOTE:** To *select multiple items*, click each item with your **CTRL** key held down while **clicking** with your mouse each item. If you would like to see all items, click the first item and *drag your mouse* to the end of the items list.
- Ability to view custom voucher additional information.

#### Notes, Policies and Procedures

#### 4-4 Financial Inquiry>Viewing/Printing an Account Inquiry- Detail View

Account Inquiry for Ariel Smith

File Edit Options

Sample Clinic  
204 Academy Street Raleigh NC 27609  
Tel: (919) 851-6177 Fax: (919) 851-5991

ACCOUNT INQUIRY 05/15/2009 11:41 AM

Account# 500

Guarantor Information:  
Ariel Smith  
250 Highway Drive  
Highland City, OH 08999  
Home Tel#: (203) 288-8888  
Work Tel#:

Patient Information:  
Patient# 500  
Ariel Smith  
250 Highway Drive  
Highland City, OH 08999  
Home Tel#: (203) 288-8888  
Work Tel#:

Payor	Current	31-60 Days	61-90 Days	Over 90	Balance
Self	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Insur	\$0.00	\$0.00	\$0.00	\$122.00	\$122.00
Collect	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
				Unassigned:	\$0.00
				Total Balance:	\$122.00

Service Date	Voucher#	Provider	Chg Amt	Pmts/Adjs	Balance	Payor	Billed Date	Age	Patient
- 07/23/2008	2290	HIGGINS	\$61.00	\$0.00	\$61.00	CIGNA	01/11/2009	124	Ariel Smith

Location	Department	Place Of Svc	Refer. Dr.	Batch#	Voucher Status	Date Updated	Responsible Party	Co-Ins Amt	Co-Ins Paid	Void Batch#	Date Voided	Voided By
RALOFF	SAMPLE	RALOFF	LIVING	01	Updated	07/25/2008	Ariel Smith	\$0.00	\$0.00			

### Financial Inquiry Viewing/Printing an Account Inquiry-Detail View

- To choose an **overview** of a specific voucher click on the **negative line** to the left of the Service Date field of each voucher.
- You can print the Account Inquiry from within this screen.

### Notes, Policies and Procedures

## 4-5 Financial Inquiry Viewing/Printing an Account Inquiry- Summary View

File Edit Options  
 - Max. Detail +

**Sample Clinic**  
 204 Academy Street Raleigh NC 27609  
 Tel: (919) 851-6177 Fax: (919) 851-5991

**ACCOUNT INQUIRY** 05/15/2009 11:41 AM

**Account# 500**

Guarantor Information:

Ariel Smith  
 250 Highway Drive  
 Highland City, OH 88999

Patient Information:

Ariel Smith  
 250 Highway Drive  
 Highland City, OH 88999

Home Tel#: (203) 288-8888  
 Work Tel#:

Payor	Current	31-60 Days	61-90 Days	Over 90	Balance
Self	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Insur	\$0.00	\$0.00	\$0.00	\$122.00	\$122.00
Collect	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
				Unassigned:	\$0.00
				Total Balance:	\$122.00

Service Date	Voucher#	Provider	Chg Amt	Pmts/Adjs	Balance	Payor	Billed Date	Age	Patient
+ 07/23/2008	2280	HIGGINS	\$61.00	\$0.00	\$61.00	CIGNA	01/11/2009	124	Ariel Smith

### Financial Inquiry Viewing/Printing an Account Inquiry- Summary View

- To get the detail view back, click on the “+” symbol.
- You can print the Account Inquiry from within this display

### Notes, Policies and Procedures

# Section 5 - Appendix:

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## 5-1 Overview- Keyboard shortcuts

### Standard Keys across the database

**Tab-** to move and accept

**Shift/Tab-** to move backward

**Home key-** Moves cursor to the beginning of the field

**End key-** Moves cursor to the end of the field

**Enter key-** to accept a function or choice if cursor is focused

**F1-** Help or  icon on Toolbar

**F4-** at any down arrows to see the available choices from a listing (except within Additional tab in Registration)

**Alt/F4-** Log out prompt from a main function, closes a companion window

**Ctrl/F4-** Closes a window

**F9-** Displays current patient and Last 5 patients (if use drop down arrow/F4)

**F9-** Displays list of Navigation Tree Functions

**Space Bar-** use as a toggle to check/uncheck a box

**Alt/Underlined letter-** to bring various tabs/functions into focus or perform command button functions.

### Keyboard Shortcuts

**Ctrl+Shift-** Move from an open window to another open window (displayed as tabs)

**Enter-** Save if command button is highlighted.

**Ctrl+Tab-** Within a function, moves to another tab within the same function/window

**F3-** Inserts today's date in a date field.

**Delete-** Delete selected text

**Ctrl+Z** Undo

**Ctrl+C** Copy

**Ctrl+V** Paste

**Ctrl/Tab** while in Navigational pane, moves within functions

**In Registration-** to access any tab within the function, Alt/Underlined letter

**Alt/u**=Summary tab

**Alt/p**=Patient tab

**Alt/o**=Account tab

**Alt/l**=Policy tab

### Standard ICONS across the database:

  **Binoculars-** perform a search -ALT/down arrow from keyboard

 **Magic Wand-** Allows you to “Build something” new or Enter something - Insert key from keyboard

  **Key-** numeric information (tab) To find a patient you can enter the patient number and tab to bring patient into focus (key functionality).

 **Red X-** deletes and entry - Delete key from keyboard

 **Down Arrow-** Alt down/arrow (or F4 at most prompts)

 **Spin Boxes-** Ctrl/down arrow

### Most common Quick Access Codes (F9+code)

<b>Patient Management</b>	<b>Scheduling</b>
<b>REG-</b> Registration	<b>APS-</b> Appointment Scheduling
<b>NOT-</b> Notes	<b>DAA-</b> Scheduling Activities
<b>DOC-</b> Documents	<b>SCR-</b> Scheduling Reports
<b>SIN-</b> Service Inquiry	<b>REF-</b> Referrals
<b>Financial Processing</b>	
<b>Fin-</b> Financial Inquiry	<b>SPR-</b> Statement Processing
<b>TRA-</b> Transactions	<b>IBI-</b> Insurance Billing
<b>CRE-</b> Claims Review	<b>FPO-</b> Financial Processing
<b>AUT-</b> Automatic Transactions (Import charges)	

Within the **Registration>Policy Tab** after user searches for a carrier, you can R click on the carrier in the grid and go directly to the Insurance Carrier Maintenance (ICM) file (assuming you have access to master files).

**Alt/d**=Additional tab  
**Atl/t**= History tab

**Insurance Carrier/Plan Lookup** [X]

**Insurance Carriers:**

Search By: Carrier Name [v] Search For: Medicare

Coverage Type: Medical [v]

Save Search By Setting      Local Search      Enterprise Search

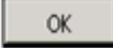
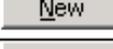
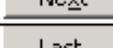
Secondary Carriers Only

Carrier Name	Abbreviation	Address	City/State/Zip
Medicare	MCR	PO Box 5002	Raleigh NC 27613

Select  
Edit

## 5-2 Overview Standard Allscripts PM Icons and Command Buttons

Icon	Function
	Find by Key
	Search
	Add New <name of record> or New
	Delete
	Memo Appointment
	Potential Patient
	Dialog

	Click to bring the highlighted choice into focus in a scan screen.
	Click Cancel to cancel previously started changes.
	Click Save to save any changes.
	Click New to create a new record in file build.
	Click Delete to delete a record in file build.
	Click First to bring up the first record into focus within a file.
	Click Previous to bring up the previous record into focus within a file
	Click Next to bring up the next record into focus within a file
	Click Last to bring up the last record into focus within a file

### Overview- Standard function icons

- On some screens you will notice Icons or Command Buttons.
- If the icon or command button is grayed, it means that this option is not available.
- To execute the function you can click on the icon or command button.
- When you hold (hover) the mouse arrow over an icon a bubble help will display.
- On many Allscripts PM screens you will be able to access a right click menu. To display the menu, right click on your mouse.
- The word or words in bold denote the key or keys you can use to execute the function.
- Above are tables of some of the standard icons and command buttons used along with their productivity keys.

### 5-3 Overview Checking the application Version



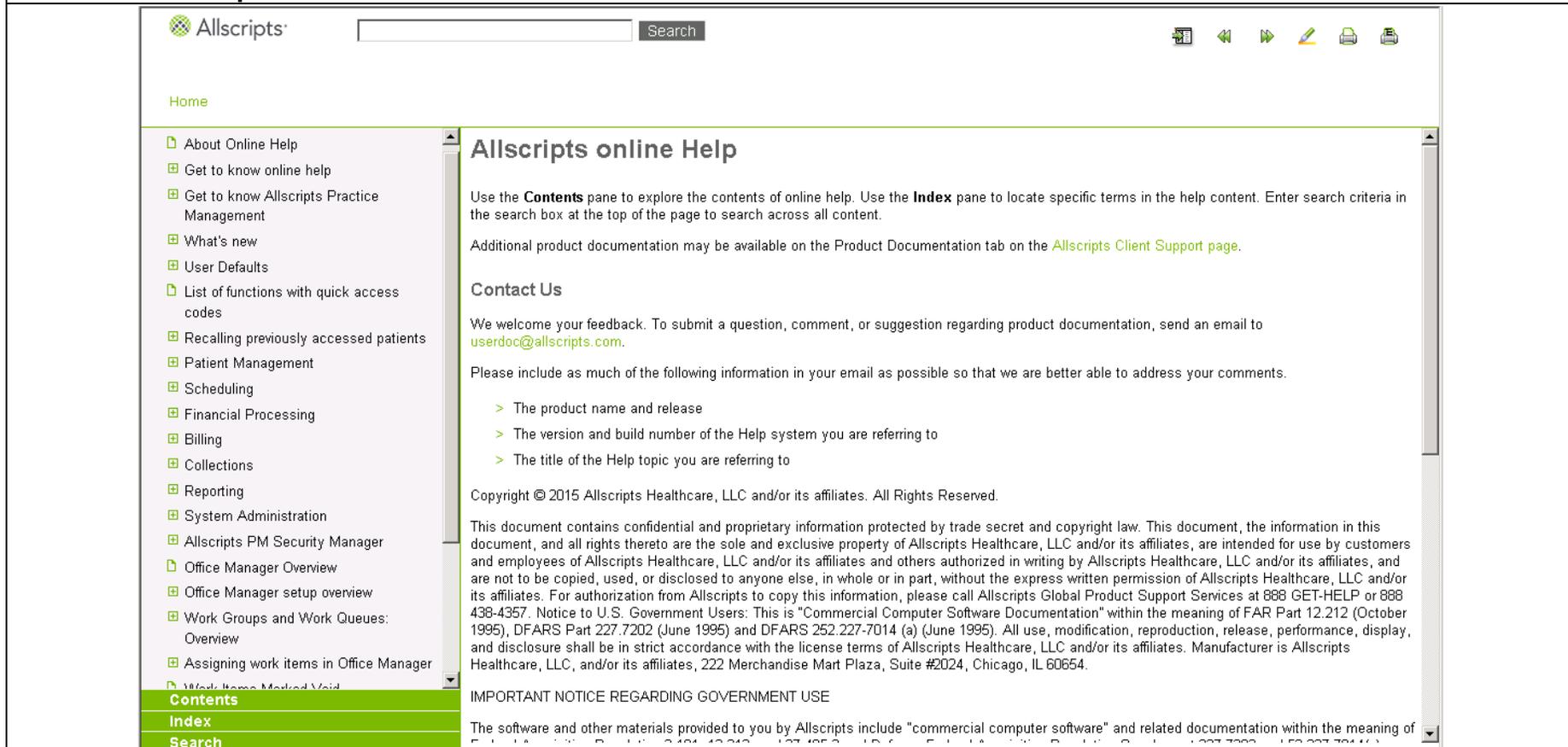
## Overview- Checking the Application Version

- Click on the About Allscripts Help option on the icon toolbar. 
- The screen will display the Allscripts PM version with copyright information.
- Only place where you can tell who is logged into the terminal.
- Click OK to exit the information display screen.

## Notes, Policies and Procedures

This screen will also allow you to see who is logged into the terminal.

## 5-4 Overview Help



The screenshot shows the Allscripts online Help interface. At the top, there is a search bar and navigation icons. The left sidebar lists various help topics, with 'Contents', 'Index', and 'Search' highlighted in green. The main content area displays the following text:

**Allscripts online Help**

Use the **Contents** pane to explore the contents of online help. Use the **Index** pane to locate specific terms in the help content. Enter search criteria in the search box at the top of the page to search across all content.

Additional product documentation may be available on the Product Documentation tab on the [Allscripts Client Support page](#).

**Contact Us**

We welcome your feedback. To submit a question, comment, or suggestion regarding product documentation, send an email to [userdoc@allscripts.com](mailto:userdoc@allscripts.com).

Please include as much of the following information in your email as possible so that we are better able to address your comments.

- > The product name and release
- > The version and build number of the Help system you are referring to
- > The title of the Help topic you are referring to

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## Overview- Viewing Help

- Click on the Question Mark  on the Tool bar OR Press **F1** to access Allscripts Help.
- Enter search information and click on **Search**. Matching help will display in the window.
- Use the arrow icons   to move back or forward between screens of searched information or TOC topics.

- Use the Printer icon  to print a topic.
- Use the Print All icon  to print all of help
- Under the TOC- Click on Useful Websites and Links to gain access to COBA link, CMS Home Page, NPI website.
- Use [Home](#) to return to the main screen.
- To Exit the Help screen, click on the **X** in the top R corner, or **File>Exit**.