

ClinixPM Pro

Management Module



ClinixPM Pro Management Module

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Reading the Audit Trail on a Patient's Account

When a new record is filed, it is classified as an Insert; when an existing record is updated, it is classified as an Update. When a record is inserted, "I", the screen displays the new information that was entered; when a record is updated, the screen displays the information as it was, before the account update.

File Maintenance	
Cd	FM
Name	Account name
Account	Account number - blank if Guarantor FM (medguar)
Guar/In Code	Guarantor number
IT	Financial Class
EX	Exception Code
H	Hold statement
R	
M	When the line has Change By=MEDPTCOL and has STMT DEFER/INS in the name column, the M column is the cycle that was processed at the time that this account had their statement deferred because they had a charge that had a 'genirej'.
S	
Date	MMDDYY Change occurred
A(ction)	An "I" will display if it is a new record, a "U" will display if it is an update to an existing record. Following the letter is the time the change occurred.
Time	Time change took place
ChangeBy	The Username that made the change
Registration Date	
Registration Doctor	
Screen Name	Screen where change was made.

Insurance Record Maintenance	
Cd	IN
Name	Insured name or 'Return Once' if user set key code to return claims in paper format as a one-time only request
Account	Account number
Guar/In Code	Insurance Company Key Code number and previous Insurance effective date.
IT	Insurance Type
EX	Blank
H	Accept Assignment
R	
M	Auto Print Insurance
S	Insurance Sequence
Date	MMDDYY Change occurred
A	An "I" will display if it is a new record, a "U" will display if it is an update to an existing record, a "D" will display if it is a deleted record. Following the letter is the time the change occurred.
Time	Time change took place
ChangeBy	The Username that made the change
Registration Date	
Registration Doctor	
Screen Name	Screen where change was made.

Registered Patient	
Cd	RG
Name	Account name
Account	Account number
Guar/In Code	Guarantor number
IT	Financial Class
EX	Exception Code
H	Hold statement
R	
M	Blank
S	Blank
Date	Date Encounter form generated
A	"P" = Check-in only, "E" = Encounter form only, "A" = Encounter form from Appt Scheduling, Blank = Check-in and Encounter form.
Time	Time Encounter form generated
ChangedBy	The Username that checked in the patient.
Registration Date	Date patient was checked in.
Registration Doctor	Doctor for which patient was checked in.
Screen Name	Screen where change was made.

Account transmitted to EMR	
Cd	MR
	*If a client uses an EMR, they could receive a MR audit record in addition to an RG audit record. One records the registration in ClinixPM and the MR records that it was sent to the EMR.
Name	Account name
Account	Account number
Guar/In Code	Medical record number received from EMR
IT	Financial Class
EX	Exception Code
H	Hold statement
R	
M	
S	
Date	MMDDYY Date account transmitted to EMR
A(ction)	Blank
Time	Time account transmitted to EMR
ChangeBy	The Username that transmitted the account

Insurance card is scanned into system	
Cd	IM
Name	Insured name
Account	Account number
Guar/In Code	Insurance Company Key Code number
IT	Insurance Type
EX	Blank
H	
R	
M	
S	Insurance Sequence image is linked to
Date	MMDDYY Date of scan
A	"I"= inserting a scanned image, "D"=deleting a scanned image, "U"=updating an image
Time	Time the scan took place.
ChangeBy	"SCAN"

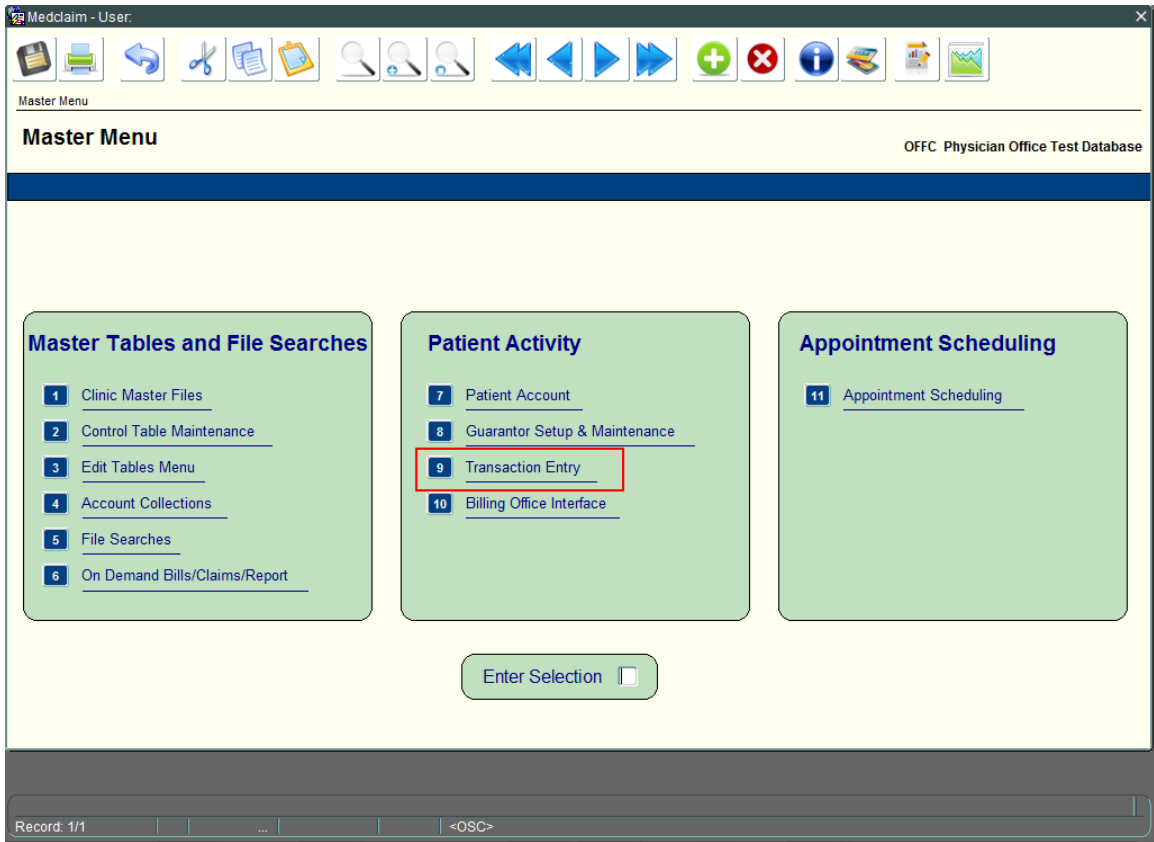
Close and Refile Claim	
Cd	RF- Primary insurance change was made for DOS other than the effective date on Patient insurance record for charges tied to an open claim, resulting in closing and re-filing of open claim.
Name	Account name
Account	Account number
Guar/In Code	Insurance key code and Guarantor number
IT	Insurance Type
EX	Blank
H	Y
R	
M	Y
S	Insurance sequence
Date	Date Encounter form generated
A	Blank
Time	Time Encounter form generated
ChangedBy	Doctor # and Date of appt.

Charges are re-priced	
Cd	RP – Primary insurance change was made for DOS other than the effective date on the Patient insurance record, resulting in a need to re-price by performing a transaction update.
Name	Account name
Account	Account number
Guar/In Code	Insurance key code and Effective Date
IT	Insurance Type
EX	
H	Y
R	
M	Y
S	Insurance sequence
Date	MMDDYY Date change occurred
A(ction)	Blank
Time	Time change took place
ChangeBy	The Username that made the change

Close and Deny Claims	
Cd	RD – Primary insurance change was made for DOS other than the effective date on the Patient insurance record for charges on a denied claim, resulting in a need to re-file the charges by performing a transaction update.
Name	Insured name
Account	Account number
Guar/In Code	Insurance Key Code and Effective Date
IT	Insurance Type
EX	
H	Y
R	
M	Y
S	Insurance Sequence image is linked to
Date	MMDDYY Date change occurred
A	Blank
Time	Time change took place.
ChangeBy	The Username that made the change

How to allocated a payment to a charge

- MM9.3



Medcmenu - User: [Close]

Master Menu > 9 - Transaction Entry Menu

Transaction Entry Menu

OFFC Physician Office Test Database

Batch

- 1 Batch List
- 2 Batch Control: Charge Entry/Update
- 3 **Batch Control: Patient Reception and Open Item Payment/Adjustment Entry**

Charge Related

- 4 Remittance Processing
- 5 Suspended Transaction Maintenance
- 6 UB04 Transaction Entry

Miscellaneous

- 7 Insurance Claims Query/Maintenance
- 8 Precertification Maintenance

Enter Selection

Record: 1/1 | ... | <OSC>

- Query for an existing batch or create a new batch

Medoibatch - User

Master Menu > 9 - Transaction Entry Menu > 3 - Batch Control

Batch Control

OFFC Physician Office Test Database

Transaction Entry | Auto Distribution | Batch Edit | Payment/Adjustment Entry | Multi-Payment/Adjustment Entry | Open Item Posting Menu

Group Code	Batch Number	Date	Last Updated	Time	User ID	Comment
12	1292	10/13/14	10/13/14	10:38:08 A.M.	AKEL	

Deposit Date	<input type="text" value="10/13/14"/>	Transaction Total	<input type="text" value="0"/>	Lock Box ID	<input type="text"/>	Hash Total	<input type="text"/>
Default DOS	<input type="text"/>	Number of Accounts	<input type="text" value="0"/>	Bank Batch ID	<input type="text"/>	Batch Balance	<input type="text" value="0.00"/>
						Allocated Amount	<input type="text" value="0.00"/>
						Unallocated Amount	<input type="text" value="0.00"/>

	Control Totals	Actual Amounts	Variance
Payments	<input type="text" value="0.00"/>	<input type="text" value="0.00"/>	<input type="text" value="0.00"/>
Adjustments	<input type="text" value="0.00"/>	<input type="text" value="0.00"/>	<input type="text" value="0.00"/>
Charges	<input type="text" value="0.00"/>	<input type="text" value="0.00"/>	<input type="text" value="0.00"/>

Batch Status (H - Hold, E - Release for Editing, R - Release for Posting)

Batch Post Month

Batch Post Year

Record: 1/1 ... <OSC>

- Select the {Open Item Posting Menu} tab at the top of the screen

Medoibatch - User.

Master Menu > 9 - Transaction Entry Menu > 3 - Batch Control

Batch Control OFFC Physician Office Test Database

Transaction Entry | Auto Distribution | Batch Edit | Payment/Adjustment Entry | Multi-Payment/Adjustment Entry | **Open Item Posting Menu**

Group Code	Batch Number	Date	Last Updated	Time	User ID	Comment
12	1292	10/13/14	10/13/14	10:38:08 A.M.	AKEL	

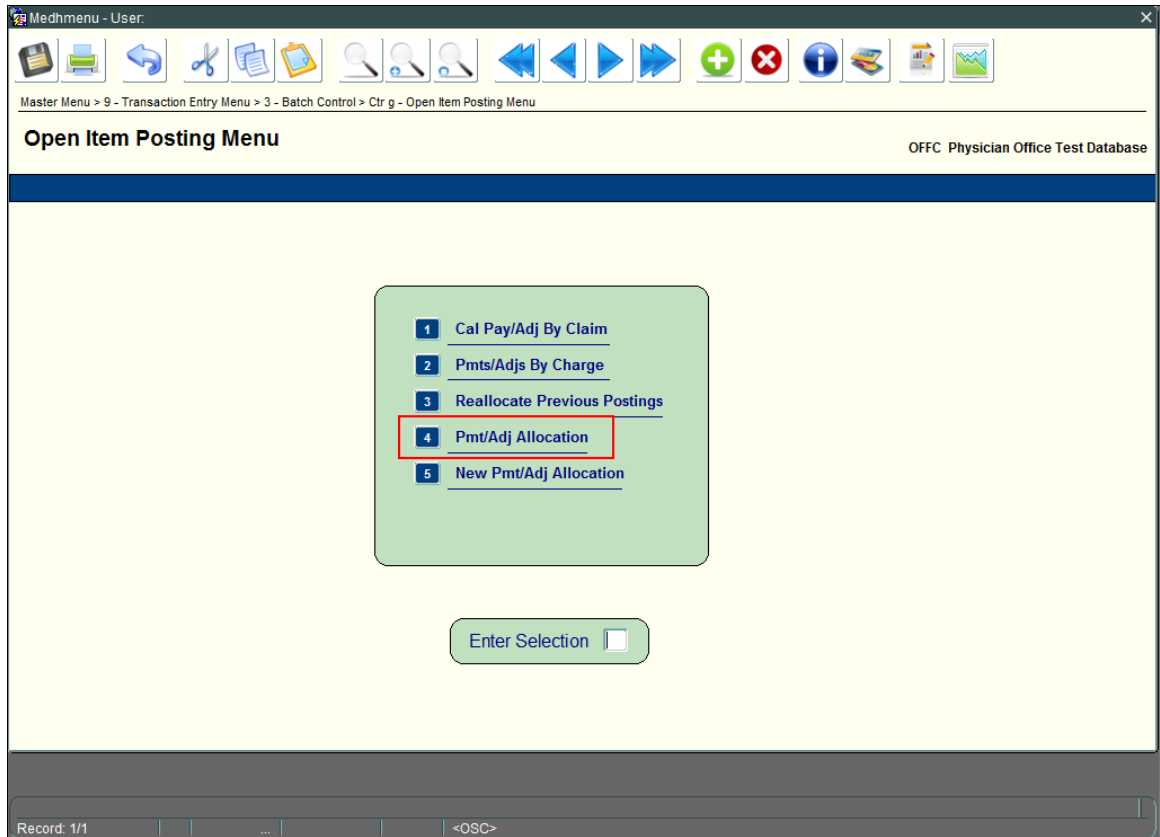
Deposit Date	10/13/14	Transaction Total	0	Lock Box ID		Hash Total	
Default DOS		Number of Accounts	0	Bank Batch ID		Batch Balance	0.00
						Allocated Amount	0.00
						Unallocated Amount	0.00

	Control Totals	Actual Amounts	Variance
Payments	0.00	0.00	0.00
Adjustments	0.00	0.00	0.00
Charges	0.00	0.00	0.00

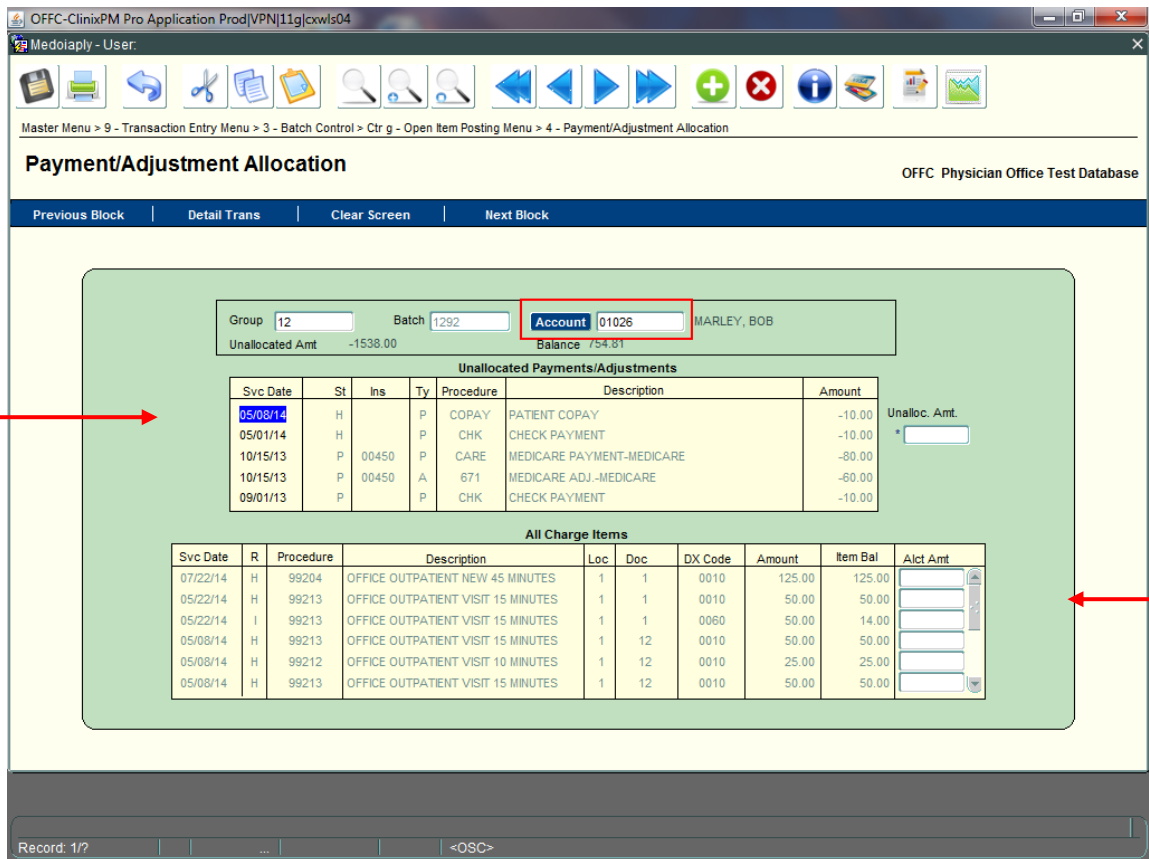
Batch Status	H	(H - Hold, E - Release for Editing, R - Release for Posting)
Batch Post Month	10	
Batch Post Year	2014	

Record: 1/1

- Select item #4- Pmt/Adj Allocation



- Enter in the account number <Tab or Enter>



OFFC-ClinixPM Pro Application Prod\VPN\11g\cxwls04
Medioplly - User

Master Menu > 9 - Transaction Entry Menu > 3 - Batch Control > Ctr g - Open Item Posting Menu > 4 - Payment/Adjustment Allocation

Payment/Adjustment Allocation

OFFC Physician Office Test Database

Previous Block | Detail Trans | Clear Screen | Next Block

Group 12 Batch 1292 **Account 01026** MARLEY, BOB
Unallocated Amt -1538.00 Balance 754.31

Unallocated Payments/Adjustments						
Svc Date	St	Ins	Ty	Procedure	Description	Amount
05/08/14	H		P	COPAY	PATIENT COPAY	-10.00
05/01/14	H		P	CHK	CHECK PAYMENT	-10.00
10/15/13	P	00450	P	CARE	MEDICARE PAYMENT-MEDICARE	-80.00
10/15/13	P	00450	A	671	MEDICARE ADJ.-MEDICARE	-60.00
09/01/13	P		P	CHK	CHECK PAYMENT	-10.00

Unalloc. Amt. =

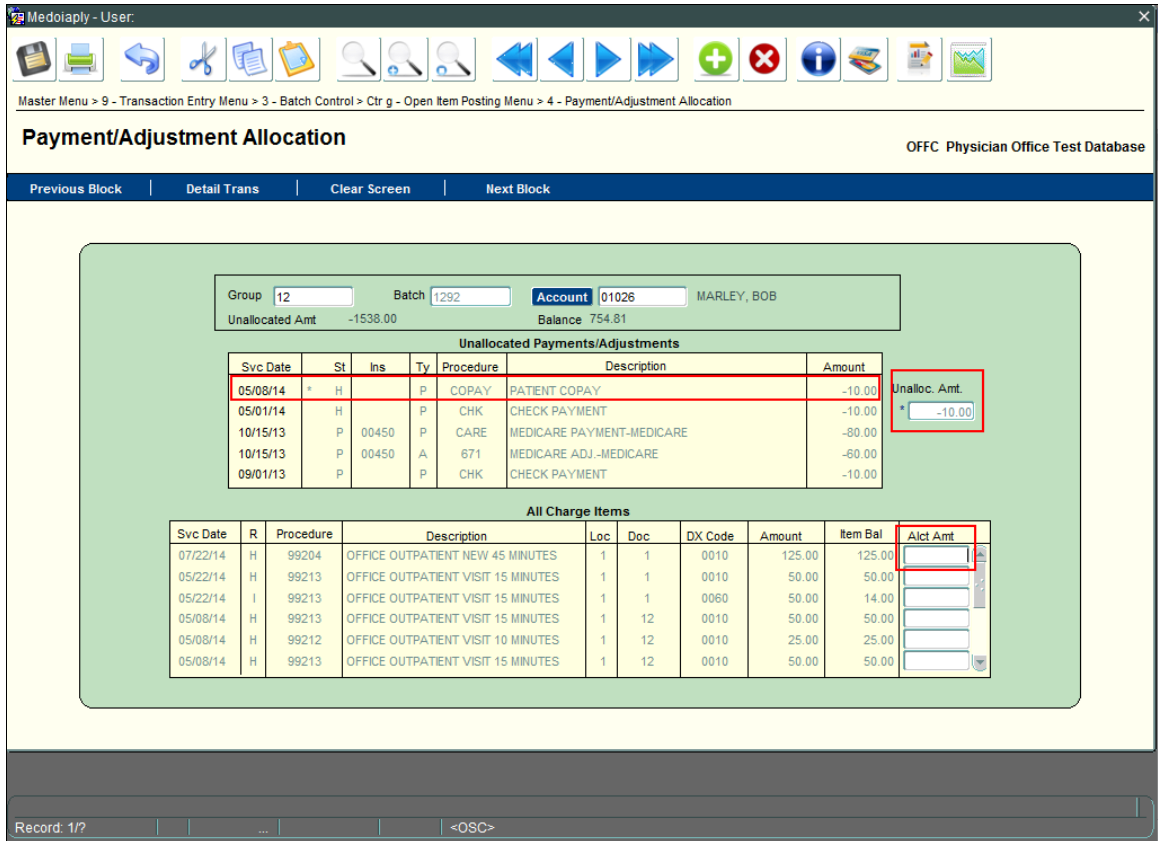
All Charge Items									
Svc Date	R	Procedure	Description	Loc	Doc	DX Code	Amount	Item Bal	Alct Amt
07/22/14	H	99204	OFFICE OUTPATIENT NEW 45 MINUTES	1	1	0010	125.00	125.00	
05/22/14	H	99213	OFFICE OUTPATIENT VISIT 15 MINUTES	1	1	0010	50.00	50.00	
05/22/14	I	99213	OFFICE OUTPATIENT VISIT 15 MINUTES	1	1	0060	50.00	14.00	
05/08/14	H	99213	OFFICE OUTPATIENT VISIT 15 MINUTES	1	12	0010	50.00	50.00	
05/08/14	H	99212	OFFICE OUTPATIENT VISIT 10 MINUTES	1	12	0010	25.00	25.00	
05/08/14	H	99213	OFFICE OUTPATIENT VISIT 15 MINUTES	1	12	0010	50.00	50.00	

Record: 1/? <OSC>

You will see in the 'Unallocated Payments/Adjustments' block all those transaction that are currently not tied to a charge.

You will also see in the 'All Charge Items' block all the charges on that account.

- Select the unallocated payment by selecting the F8 key or the {Next Block} tab while your cursor is on the correct payment or adjustment



Medialogy - User

Master Menu > 9 - Transaction Entry Menu > 3 - Batch Control > Ctrl g - Open Item Posting Menu > 4 - Payment/Adjustment Allocation

Payment/Adjustment Allocation

OFFC Physician Office Test Database

Previous Block | Detail Trans | Clear Screen | Next Block

Group: 12 Batch: 1292 Account: 01026 MARLEY, BOB
 Unallocated Amt: -1538.00 Balance: 754.81

Unallocated Payments/Adjustments

Svc Date	St	Ins	Ty	Procedure	Description	Amount
05/08/14	*	H	P	COPAY	PATENT COPAY	-10.00
05/01/14		H	P	CHK	CHECK PAYMENT	-10.00
10/15/13		P	P	CARE	MEDICARE PAYMENT-MEDICARE	-80.00
10/15/13		P	A	671	MEDICARE ADJ.-MEDICARE	-60.00
09/01/13		P	P	CHK	CHECK PAYMENT	-10.00

Unalloc. Amt. * -10.00

All Charge Items

Svc Date	R	Procedure	Description	Loc	Doc	DX Code	Amount	Item Bal	Alct Amt
07/22/14	H	99204	OFFICE OUTPATIENT NEW 45 MINUTES	1	1	0010	125.00	125.00	
05/22/14	H	99213	OFFICE OUTPATIENT VISIT 15 MINUTES	1	1	0010	50.00	50.00	
05/22/14	I	99213	OFFICE OUTPATIENT VISIT 15 MINUTES	1	1	0060	50.00	14.00	
05/08/14	H	99213	OFFICE OUTPATIENT VISIT 15 MINUTES	1	12	0010	50.00	50.00	
05/08/14	H	99212	OFFICE OUTPATIENT VISIT 10 MINUTES	1	12	0010	25.00	25.00	
05/08/14	H	99213	OFFICE OUTPATIENT VISIT 15 MINUTES	1	12	0010	50.00	50.00	

Record: 1/? <OSC>

The dollar amount of the payment or adjustment selected will appear to the right in the 'Unalloc Amt.' field (in the red box above) and your cursor will be sitting in the 'All Charge Item' block in the 'Alct Amt' field.

- Enter the dollar amount in the 'Alct Amt' field next to the correct charge(s).

Medioaply - User

Master Menu > 9 - Transaction Entry Menu > 3 - Batch Control > Ctr g - Open Item Posting Menu > 4 - Payment/Adjustment Allocation

Payment/Adjustment Allocation

OFFC Physician Office Test Database

Previous Block | Detail Trans | Clear Screen | Next Block

Group Batch Account MARLEY, BOB

Unallocated Amt -1538.00 Balance 754.81

Unallocated Payments/Adjustments							Unalloc. Amt.
Svc Date	St	Ins	Ty	Procedure	Description	Amount	<input type="text" value="0.00"/>
05/08/14	*	H	P	COPAY	PATIENT COPAY	-10.00	
05/01/14	H		P	CHK	CHECK PAYMENT	-10.00	
10/15/13	P	00450	P	CARE	MEDICARE PAYMENT-MEDICARE	-80.00	
10/15/13	P	00450	A	671	MEDICARE ADJ.-MEDICARE	-60.00	
09/01/13	P		P	CHK	CHECK PAYMENT	-10.00	

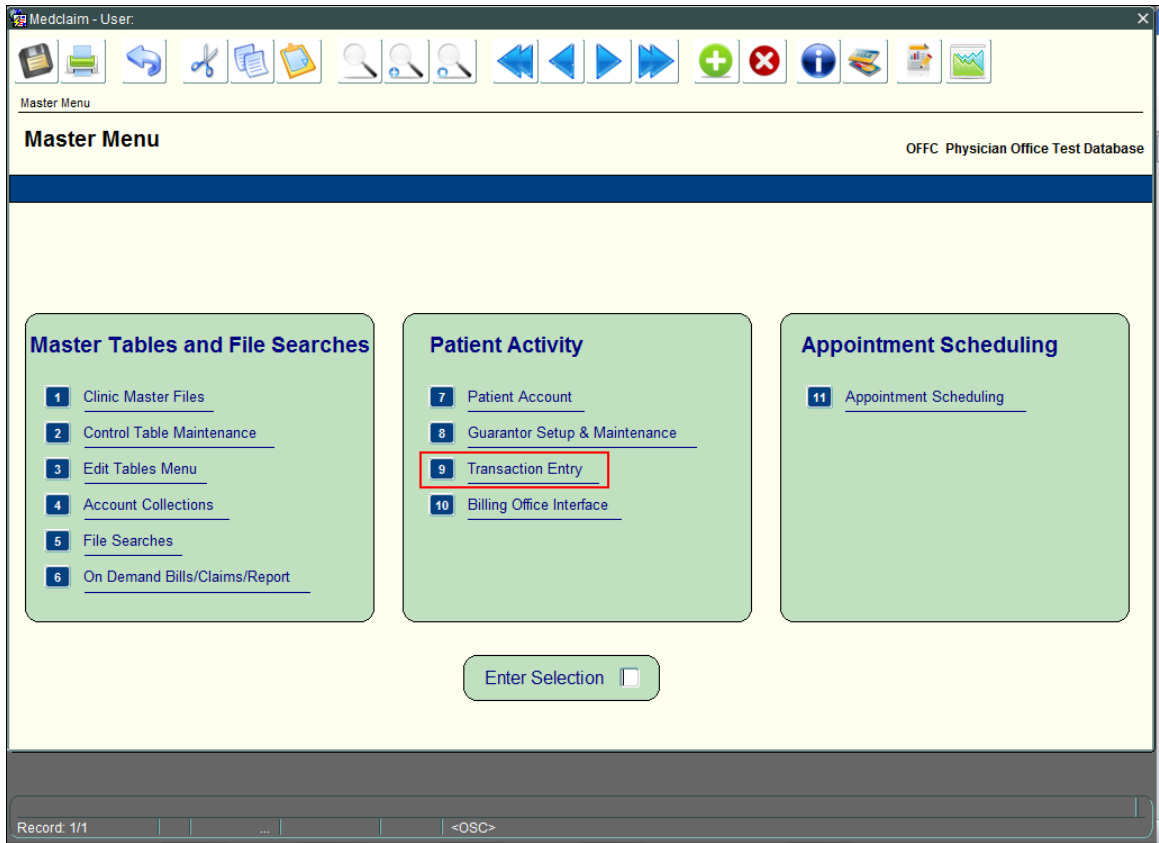
All Charge Items									
Svc Date	R	Procedure	Description	Loc	Doc	DX Code	Amount	Item Bal	Alct Amt
07/22/14	H	99204	OFFICE OUTPATIENT NEW 45 MINUTES	1	1	0010	125.00	115.00	-10.00
05/22/14	H	99213	OFFICE OUTPATIENT VISIT 15 MINUTES	1	1	0010	50.00	50.00	
05/22/14	I	99213	OFFICE OUTPATIENT VISIT 15 MINUTES	1	1	0060	50.00	14.00	
05/08/14	H	99213	OFFICE OUTPATIENT VISIT 15 MINUTES	1	12	0010	50.00	50.00	
05/08/14	H	99212	OFFICE OUTPATIENT VISIT 10 MINUTES	1	12	0010	25.00	25.00	
05/08/14	H	99213	OFFICE OUTPATIENT VISIT 15 MINUTES	1	12	0010	50.00	50.00	

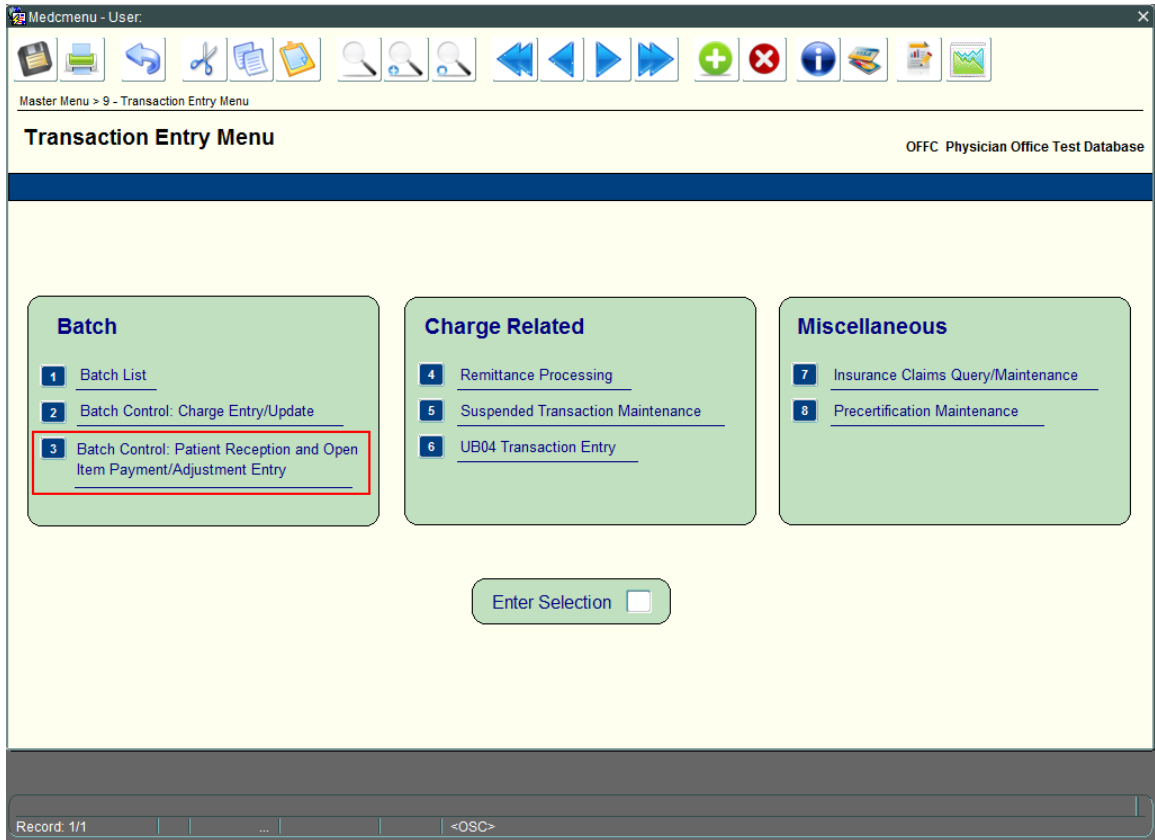
Record: 2/?

- Save

How to unallocate and reallocate a payment

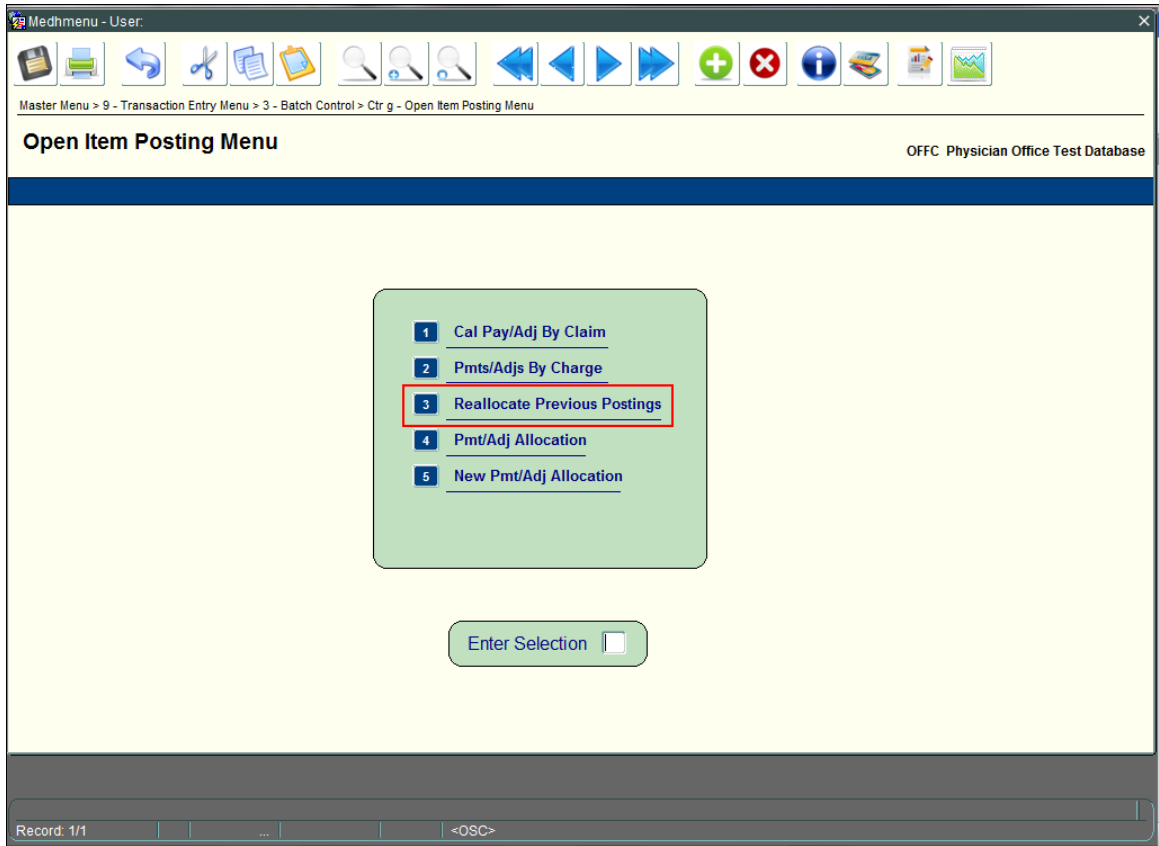
- MM9.3



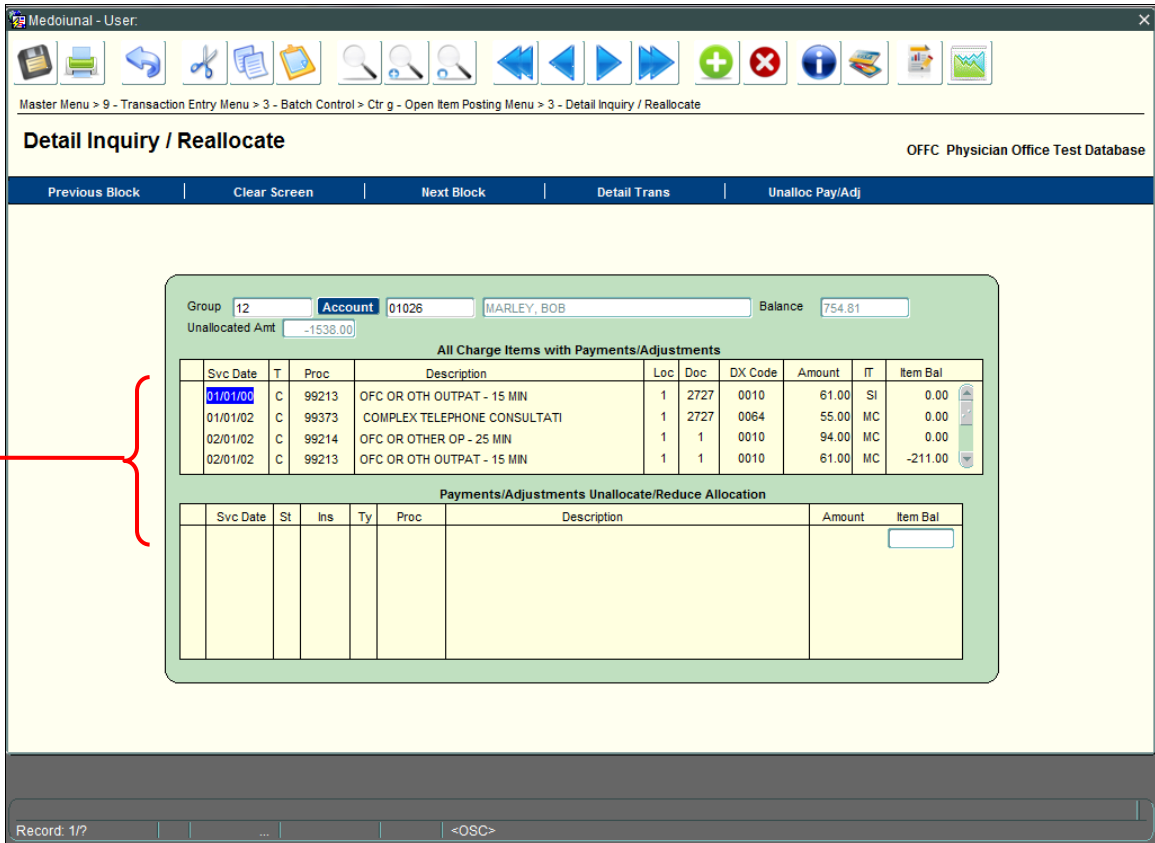


- Query or create a new batch
- Select the {Ctrl G-Open Item Post} tab at the top of the screen

- Select #3



- Enter in the account number <Tab or Enter>



Medoional - User

Master Menu > 9 - Transaction Entry Menu > 3 - Batch Control > Ctr g - Open Item Posting Menu > 3 - Detail Inquiry / Reallocate

Detail Inquiry / Reallocate OFFC Physician Office Test Database

Previous Block | Clear Screen | Next Block | Detail Trans | Unalloc Pay/Adj

Group 12 | Account 01026 | MARLEY, BOB | Balance 754.81
Unallocated Amt -1538.00

All Charge Items with Payments/Adjustments

Svc Date	T	Proc	Description	Loc	Dec	DX Code	Amount	IT	Item Bal
01/01/00	C	99213	OFC OR OTH OUTPAT - 15 MIN	1	2727	0010	61.00	SI	0.00
01/01/02	C	99373	COMPLEX TELEPHONE CONSULTATI	1	2727	0064	55.00	MC	0.00
02/01/02	C	99214	OFC OR OTHER OP - 25 MIN	1	1	0010	94.00	MC	0.00
02/01/02	C	99213	OFC OR OTH OUTPAT - 15 MIN	1	1	0010	61.00	MC	-211.00

Payments/Adjustments Unallocate/Reduce Allocation

Svc Date	St	Ins	Ty	Proc	Description	Amount	Item Bal

Record: 1/?

You will see in the 'All Charge Items with Payments/Adjustments' block all the charges with payments and adjustments tied to them.

- Select the charge that you need to remove the payment or adjust from by placing your cursor on that charge and selecting the Next Block tab at the top of the screen or by selecting F8 key.

Medioinual - User.

Master Menu > 9 - Transaction Entry Menu > 3 - Batch Control > Ctr g - Open Item Posting Menu > 3 - Detail Inquiry / Reallocate

Detail Inquiry / Reallocate

OFFC Physician Office Test Database

Previous Block | Clear Screen | **Next Block** | Detail Trans | Unalloc Pay/Adj

Group Account MARLEY, BOB Balance
 Unallocated Amt

All Charge Items with Payments/Adjustments

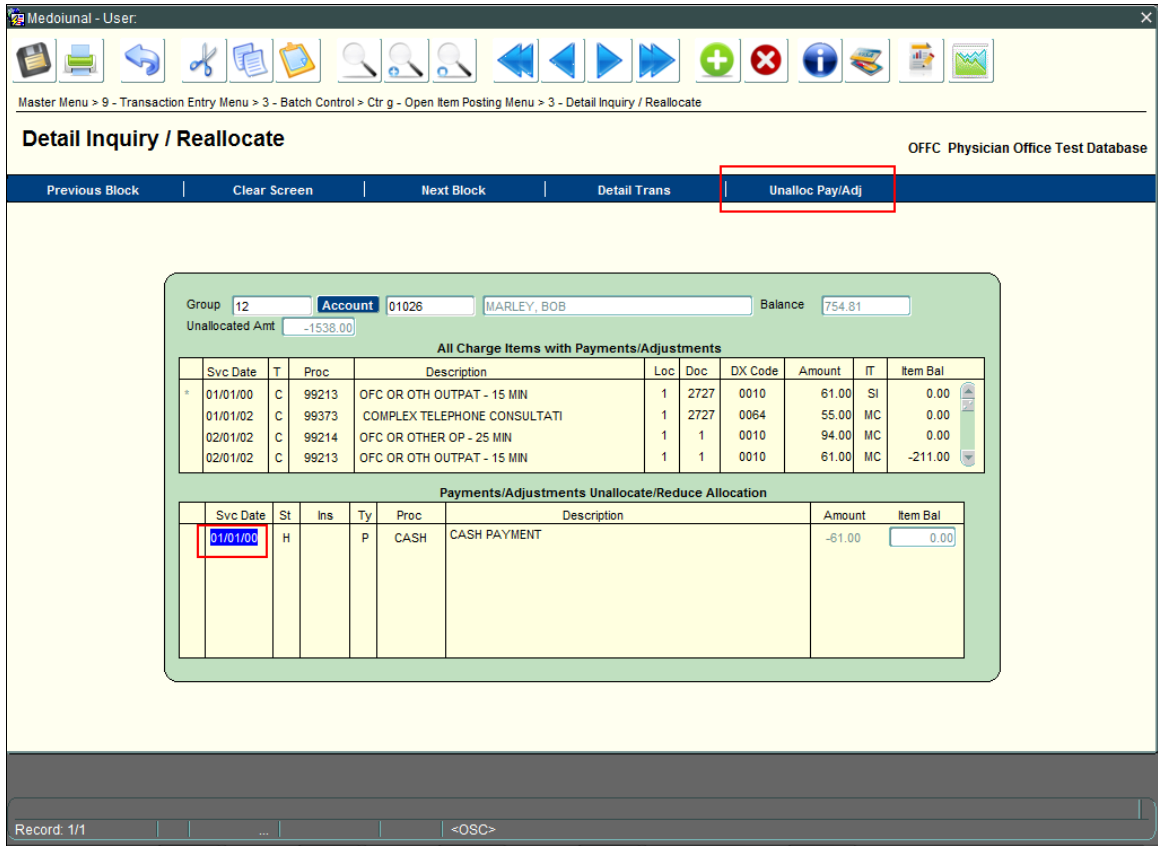
Svc Date	T	Proc	Description	Loc	Doc	DX Code	Amount	IT	Item Bal
01/01/00	C	99213	OFC OR OTH OUTPAT - 15 MIN	1	2727	0010	61.00	SI	0.00
01/01/02	C	99373	COMPLEX TELEPHONE CONSULTATI	1	2727	0064	55.00	MC	0.00
02/01/02	C	99214	OFC OR OTHER OP - 25 MIN	1	1	0010	94.00	MC	0.00
02/01/02	C	99213	OFC OR OTH OUTPAT - 15 MIN	1	1	0010	61.00	MC	-211.00

Payments/Adjustments Unallocate/Reduce Allocation

Svc Date	St	Ins	Ty	Proc	Description	Amount	Item Bal

Record: 1/?

- Once your cursor is on the correct payment or adjustment that needs to be removed from the charge you have selected, you will need to select the Unalloc Pay/Adj tab at the top of the screen or by using the Shft F8 on the keyboard.



Medoimnal - User

Master Menu > 9 - Transaction Entry Menu > 3 - Batch Control > Ctr g - Open Item Posting Menu > 3 - Detail Inquiry / Reallocate

Detail Inquiry / Reallocate OFFC Physician Office Test Database

Previous Block | Clear Screen | Next Block | Detail Trans | **Unalloc Pay/Adj**

Group 12 Account 01026 MARLEY, BOB Balance 754.81

Unallocated Amt -1538.00

All Charge Items with Payments/Adjustments

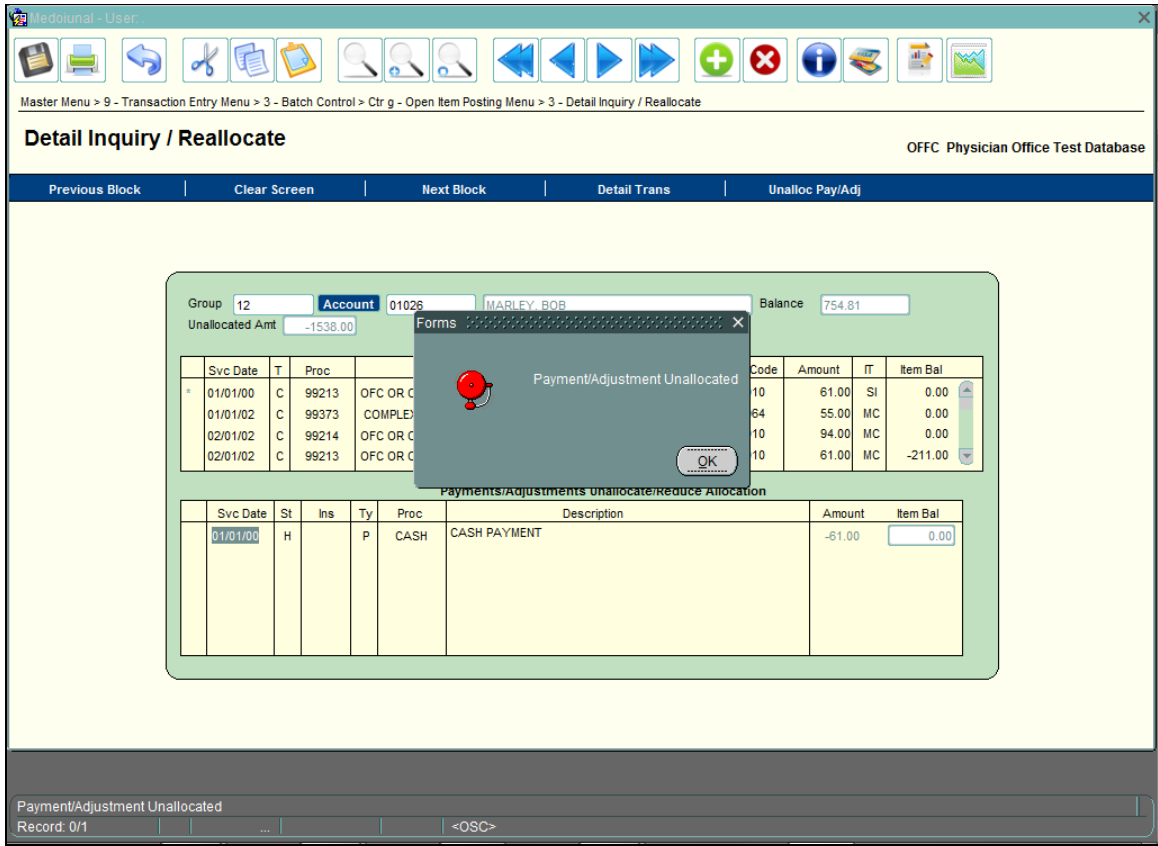
Svc Date	T	Proc	Description	Loc	Doc	DX Code	Amount	IT	Item Bal
01/01/00	C	99213	OFC OR OTH OUTPAT - 15 MIN	1	2727	0010	61.00	SI	0.00
01/01/02	C	99373	COMPLEX TELEPHONE CONSULTATI	1	2727	0064	55.00	MC	0.00
02/01/02	C	99214	OFC OR OTHER OP - 25 MIN	1	1	0010	94.00	MC	0.00
02/01/02	C	99213	OFC OR OTH OUTPAT - 15 MIN	1	1	0010	61.00	MC	-211.00

Payments/Adjustments Unallocate/Reduce Allocation

Svc Date	St	Ins	Ty	Proc	Description	Amount	Item Bal
01/01/00	H		P	CASH	CASH PAYMENT	-61.00	0.00

Record: 1/1 | ... | <OSC>

- Click 'OK' or hit {Enter} when the below popup appears.



Medjournal - User

Master Menu > 9 - Transaction Entry Menu > 3 - Batch Control > Ctr g - Open Item Posting Menu > 3 - Detail Inquiry / Reallocate

Detail Inquiry / Reallocate OFFC Physician Office Test Database

Previous Block | Clear Screen | Next Block | Detail Trans | Unalloc Pay/Adj

Group 12 Account 01026 MARLEY_BOB Balance 754.81
Unallocated Amt -1538.00

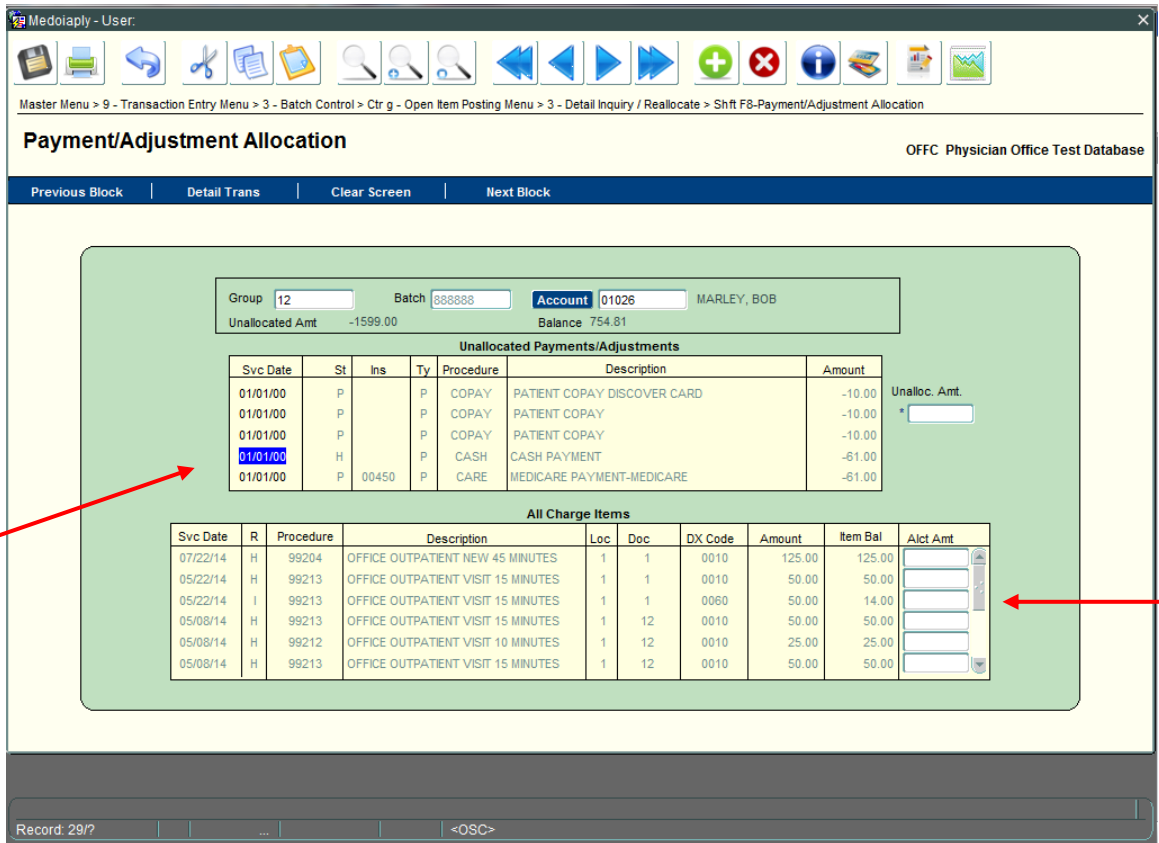
Svc Date	T	Proc		Code	Amount	IT	Item Bal
01/01/00	C	99213	OFC OR C	10	61.00	SI	0.00
01/01/02	C	99373	COMPLE	64	55.00	MC	0.00
02/01/02	C	99214	OFC OR C	10	94.00	MC	0.00
02/01/02	C	99213	OFC OR C	10	61.00	MC	-211.00

Payments/Adjustments Unallocated/Reduce Allocation

Svc Date	St	Ins	Ty	Proc	Description	Amount	Item Bal
01/01/00	H		P	CASH	CASH PAYMENT	-61.00	0.00

Payment/Adjustment Unallocated
Record: 0/1 <OSC>

- The system will automatically take you to the Payment/Adjustment Allocation Screen where you will be able to re-allocate that payment or adjustment to a new charge.



Mediaplly - User

Master Menu > 9 - Transaction Entry Menu > 3 - Batch Control > Ctr g - Open Item Posting Menu > 3 - Detail Inquiry / Reallocate > Shft F8-Payment/Adjustment Allocation

Payment/Adjustment Allocation

OFFC Physician Office Test Database

Previous Block | Detail Trans | Clear Screen | Next Block

Group: 12 Batch: 888888 Account: 01026 MARLEY, BOB
Unallocated Amt: -1599.00 Balance: 754.81

Svc Date	St	Ins	Ty	Procedure	Description	Amount
01/01/00	P		P	COPAY	PATIENT COPAY DISCOVER CARD	-10.00
01/01/00	P		P	COPAY	PATIENT COPAY	-10.00
01/01/00	P		P	COPAY	PATIENT COPAY	-10.00
01/01/00	H		P	CASH	CASH PAYMENT	-61.00
01/01/00	P	00450	P	CARE	MEDICARE PAYMENT-MEDICARE	-61.00

Unalloc. Amt:

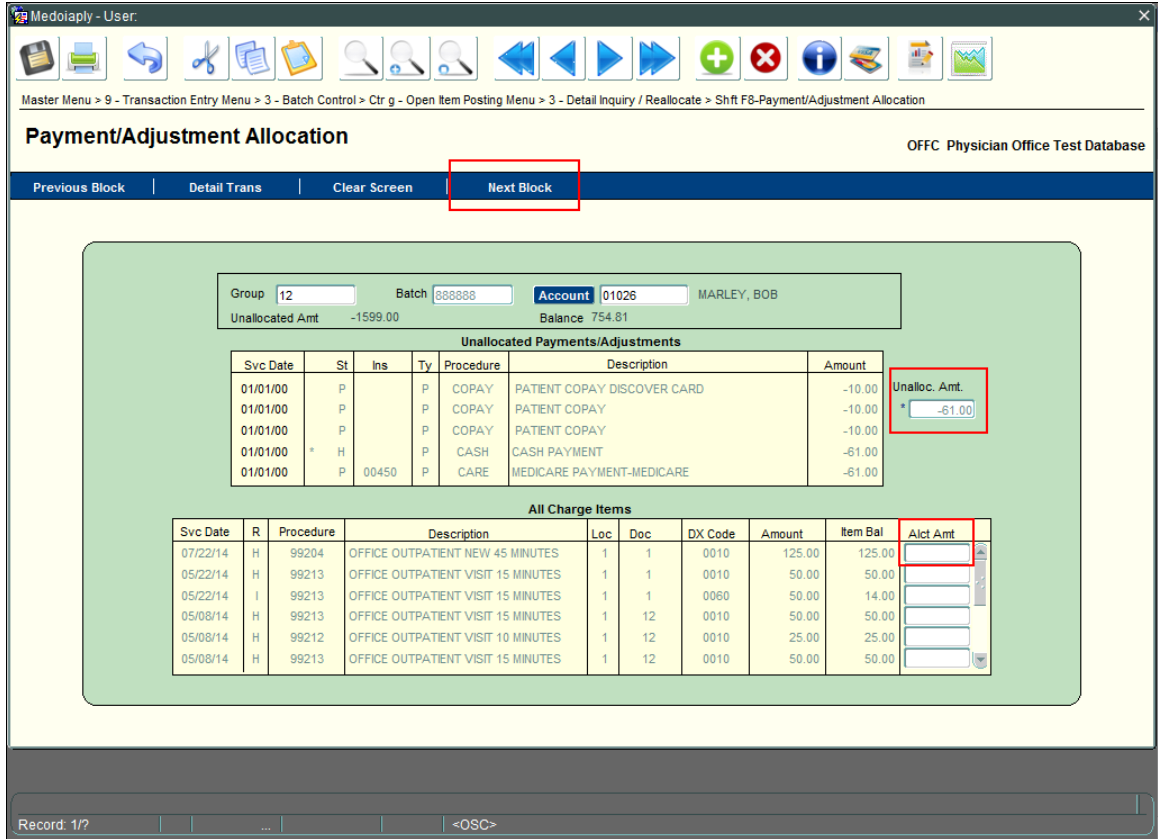
Svc Date	R	Procedure	Description	Loc	Doc	DX Code	Amount	Item Bal	Alct Amt
07/22/14	H	99204	OFFICE OUTPATIENT NEW 45 MINUTES	1	1	0010	125.00	125.00	
05/22/14	H	99213	OFFICE OUTPATIENT VISIT 15 MINUTES	1	1	0010	50.00	50.00	
05/22/14	I	99213	OFFICE OUTPATIENT VISIT 15 MINUTES	1	1	0060	50.00	14.00	
05/08/14	H	99213	OFFICE OUTPATIENT VISIT 15 MINUTES	1	12	0010	50.00	50.00	
05/08/14	H	99212	OFFICE OUTPATIENT VISIT 10 MINUTES	1	12	0010	25.00	25.00	
05/08/14	H	99213	OFFICE OUTPATIENT VISIT 15 MINUTES	1	12	0010	50.00	50.00	

Record: 29/? <OSC>

You will see in the 'Unallocated Payments/Adjustments' block all those transaction that are currently not tied to a charge.

You will also see in the 'All Charge Items' block all the charges on that account.

- Select the unallocated payment by selecting the F8 key or the {Next Block} tab while your cursor is on the correct payment or adjustment



Mediotaply - User

Master Menu > 9 - Transaction Entry Menu > 3 - Batch Control > Ctrl g - Open Item Posting Menu > 3 - Detail Inquiry / Reallocate > Shift F8-Payment/Adjustment Allocation

Payment/Adjustment Allocation

OFFC Physician Office Test Database

Previous Block | Detail Trans | Clear Screen | **Next Block**

Group 12 Batch 888888 Account 01026 MARLEY, BOB
Unallocated Amt -1599.00 Balance 754.81

Unallocated Payments/Adjustments

Svc Date	St	Ins	Ty	Procedure	Description	Amount
01/01/00	P		P	COPAY	PATIENT COPAY DISCOVER CARD	-10.00
01/01/00	P		P	COPAY	PATIENT COPAY	-10.00
01/01/00	P		P	COPAY	PATIENT COPAY	-10.00
01/01/00	* H		P	CASH	CASH PAYMENT	-61.00
01/01/00	P	00450	P	CARE	MEDICARE PAYMENT-MEDICARE	-61.00

Unalloc. Amt. * -61.00

All Charge Items

Svc Date	R	Procedure	Description	Loc	Doc	DX Code	Amount	Item Bal	Alct Amt
07/22/14	H	99204	OFFICE OUTPATIENT NEW 45 MINUTES	1	1	0010	125.00	125.00	
05/22/14	H	99213	OFFICE OUTPATIENT VISIT 15 MINUTES	1	1	0010	50.00	50.00	
05/22/14	I	99213	OFFICE OUTPATIENT VISIT 15 MINUTES	1	1	0060	50.00	14.00	
05/08/14	H	99213	OFFICE OUTPATIENT VISIT 15 MINUTES	1	12	0010	50.00	50.00	
05/08/14	H	99212	OFFICE OUTPATIENT VISIT 10 MINUTES	1	12	0010	25.00	25.00	
05/08/14	H	99213	OFFICE OUTPATIENT VISIT 15 MINUTES	1	12	0010	50.00	50.00	

Record: 1/? <OSC>

The dollar amount of the payment or adjustment selected will appear to the right in the 'Unalloc Amt.' field (in the red box above) and your cursor will be sitting in the 'All Charge Item' block in the 'Alct Amt' field.

- Enter the dollar amount in the 'Alct Amt' field next to the correct charge.

Medioaply - User: [Icons]

Master Menu > 9 - Transaction Entry Menu > 3 - Batch Control > Ctr g - Open Item Posting Menu > 3 - Detail Inquiry / Realocate > Shft F8-Payment/Adjustment Allocation

Payment/Adjustment Allocation

OFFC Physician Office Test Database

Previous Block | Detail Trans | Clear Screen | Next Block

Group Batch Account MARLEY, BOB

Unallocated Amt -1599.00 Balance 754.81

Unallocated Payments/Adjustments

Svc Date	St	Ins	Ty	Procedure	Description	Amount
01/01/00	P		P	COPAY	PATIENT COPAY DISCOVER CARD	-10.00
01/01/00	P		P	COPAY	PATIENT COPAY	-10.00
01/01/00	P		P	COPAY	PATIENT COPAY	-10.00
01/01/00	* H		P	CASH	CASH PAYMENT	-61.00
01/01/00	P	00450	P	CARE	MEDICARE PAYMENT-MEDICARE	-61.00

Unalloc. Amt.

All Charge Items

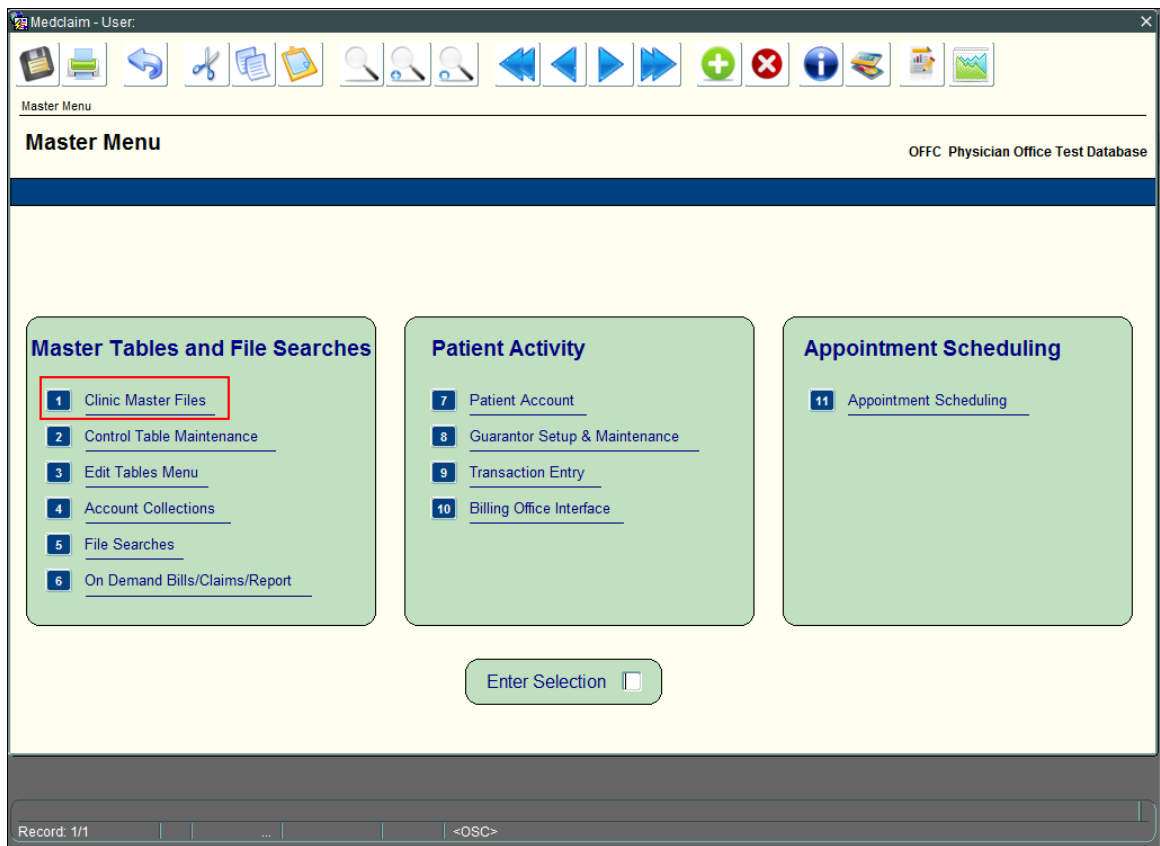
Svc Date	R	Procedure	Description	Loc	Doc	DX Code	Amount	Item Bal	Alct Amt
07/22/14	H	99204	OFFICE OUTPATIENT NEW 45 MINUTES	1	1	0010	125.00	64.00	-61.00
05/22/14	H	99213	OFFICE OUTPATIENT VISIT 15 MINUTES	1	1	0010	50.00	50.00	
05/22/14	I	99213	OFFICE OUTPATIENT VISIT 15 MINUTES	1	1	0060	50.00	14.00	
05/08/14	H	99213	OFFICE OUTPATIENT VISIT 15 MINUTES	1	12	0010	50.00	50.00	
05/08/14	H	99212	OFFICE OUTPATIENT VISIT 10 MINUTES	1	12	0010	25.00	25.00	
05/08/14	H	99213	OFFICE OUTPATIENT VISIT 15 MINUTES	1	12	0010	50.00	50.00	

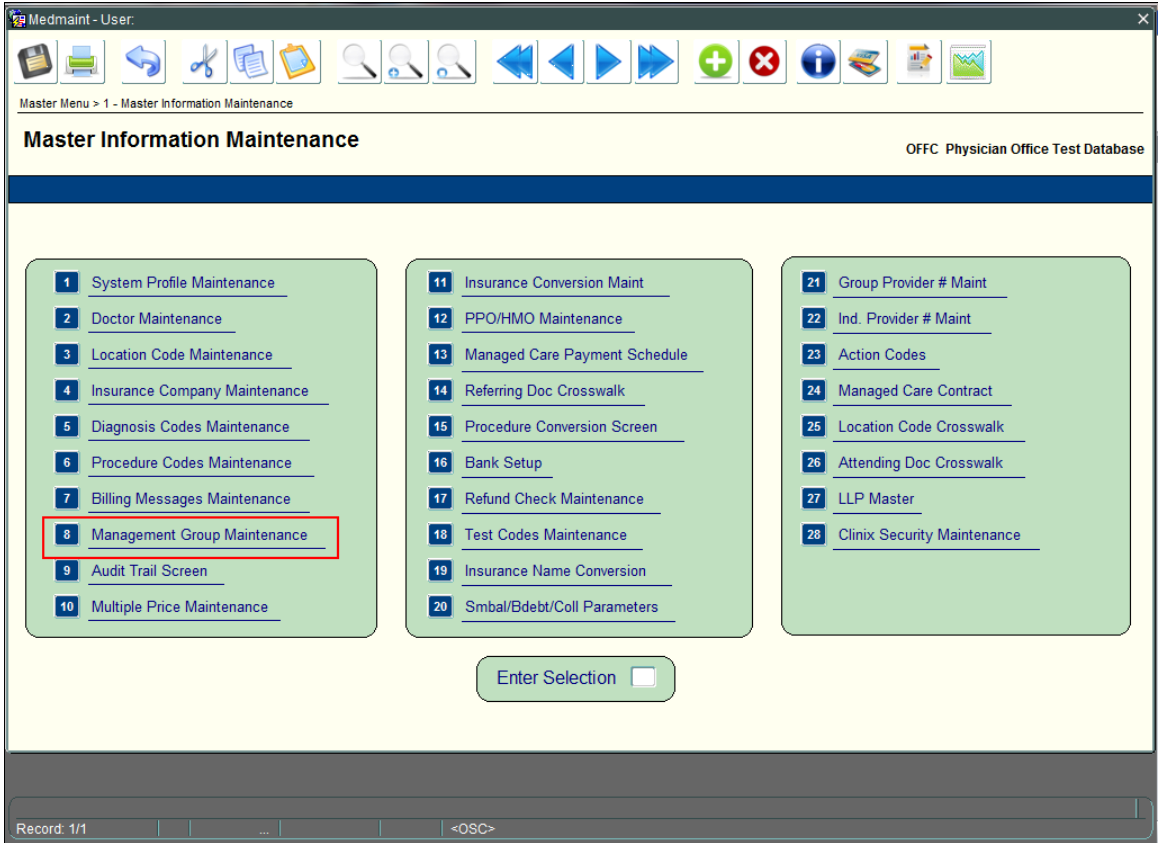
Record: 2/?

- Save

Group Statistics

- MM1.8





- Query your group
- Select the Group Statistics tab at the top of the screen or hit the F12 key.

Medgrpr - User

Master Menu > 1 - Master Information Maintenance > 8 - Management Group Profile Maintenance

Management Group Profile Maintenance

OFFC Physician Office Test Database

Provider #'s	Group Statistics	Alternate Statement Address	Alternate Claim Billing Address	Alternate Claim Pay to Address
<p>Group Code: <input type="text" value="12"/> Master Grp JK</p> <p>Short Name: PHY OFFICE</p> <p>Group Name: PHYSICIAN OFFICE & TEST GROUP</p> <p>Group Name2: <input type="text"/></p> <p>Address One: 123 BEST IN TOWN DRIVE</p> <p>Address Two: ADDR2</p> <p>City: GARLAND St TX</p> <p>Zip Code: 75040 8988 Country USA</p> <p>Billing Office: 555 555 5511 Ext 5678</p> <p>Contact: 555 555 5512 Ext 151</p> <p>Fax: 555 555 5513 Ext <input type="text"/></p> <p>Contact Email: physicianoffice@aol.com</p> <p>Office Code: CMIS Clinix Medical Info Services</p>				
<p>Auto Doctor Assign <input checked="" type="checkbox"/> Auto Acct Assign <input checked="" type="checkbox"/></p> <p>Auto DrCode Assign <input checked="" type="checkbox"/> Auto Acct 1910</p> <p>Auto Doctor <input type="checkbox"/> Explode Chgs? <input checked="" type="checkbox"/></p> <p>Auto Guar Assign <input checked="" type="checkbox"/> Add end date <input checked="" type="checkbox"/></p> <p>Auto Guarantor 1908 Allow Att. as Ref. <input checked="" type="checkbox"/></p>				
<p>Defaults</p> <p>Location Code <input type="text"/> Exception Code <input type="text"/></p> <p>Price Code PP Self Pay Type SP</p> <p>Account Stat A Accession Num <input type="text"/></p> <p>Update Exc Code <input type="checkbox"/></p>				
<p>ePayments</p> <p>Print PIN #? <input checked="" type="checkbox"/> Min ePay Amt 10.00</p> <p>Min ePay % 30.00 Stmt PIN Valid (Days) 27</p> <p>Client URL: www.testingclienturforcustomers12.org</p>				
<p>UB04 Information</p> <p>Facility Type 7 Bill Class 1</p>				
<p>Max Patient Billings 3 Misc Doctor <input type="checkbox"/></p> <p>Collection Letter 60 Auto Suspend Charges Yes</p> <p>Patient Schedule Days 740 Acct Type Account Billed</p> <p>Patient Schedule Purge <input type="checkbox"/></p> <p>Pat Scheduled Thru 10/21/16</p>				
<p>Client Revenue %</p> <p>DME Supplier # <input type="text"/> Percent 8.5</p> <p>Scan Bar Code <input type="text"/> Ct <input type="checkbox"/></p> <p>Scan Vendor <input type="text"/> Cpgrp <input type="checkbox"/></p> <p>Server Name aqweb.aquariusimaging.net</p>				
<p>Provider Numbers</p> <p>Medicare <input type="text"/></p> <p>Medicaid <input type="text"/></p> <p>Blue Cross <input type="text"/></p> <p>Last Update 09/24/14 by JLAN</p>				

Record: 1/1 <OSC>

Medgrpst - User.

Master Menu > 1 - Master Information Maintenance > 8 - Management Group Profile Maintenance > F12 - Group Status

Group Status OFFC Physician Office Test Database

For Monthly History

Number of Cycles 4	Group Code 12	Last Daily
Last Cycle Number 3	Current Cycle 4	Last EOM 09/30/14
	Last Cycle 10/10/14	

Balances

Current	-47,295.70	Last EOM	-47,295.70	Current Year	-47,420.70
---------	------------	----------	------------	--------------	------------

Month to Date

	Charges	Payments	Adjustments
Amount	.00	.00	.00
Transactions	0	0	0

Year to Date

	Charges	Payments	Adjustments
Amount	125.00	.00	.00
Transactions	21	38	10

Record: 1/1 ... <OSC>

- For a more detailed look broken out by month, select the 'For Monthly History' tab at the top of the screen or hit F12 on the keyboard.

Medghist - User

Master Menu > 1 - Master Information Maintenance > 8 - Management Group Profile Maintenance > F12 - Group Status > F12 - Group History

Group History OFFC Physician Office Test Database

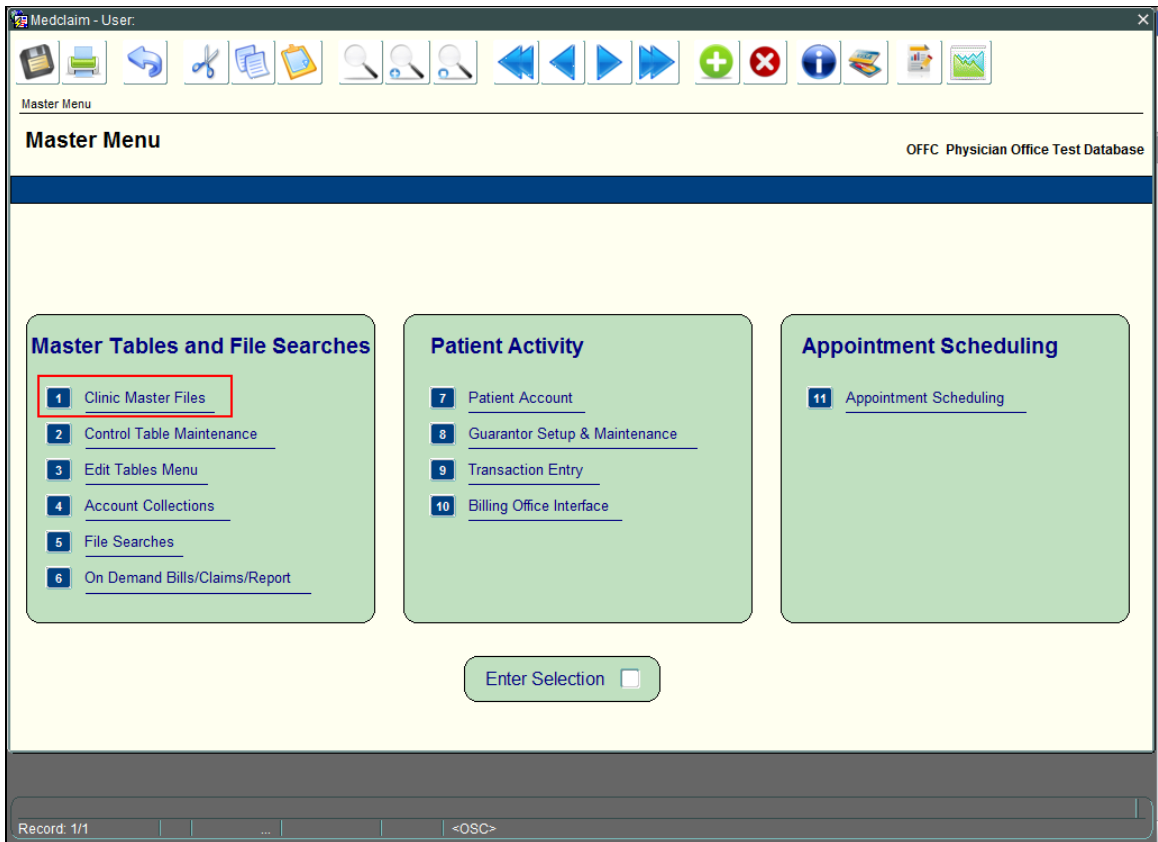
Group 12 **PHYSICIAN OFFICE & TEST**

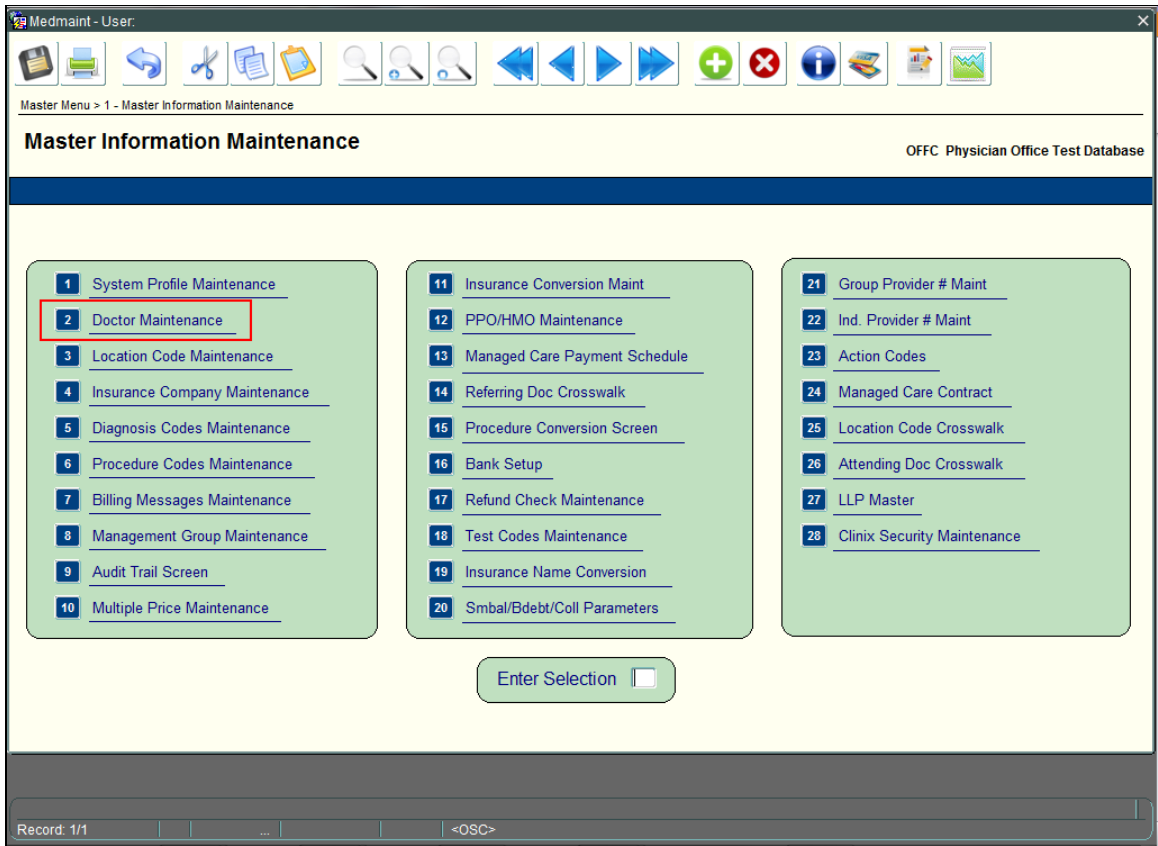
Date	Charges	Payments	Adjustments	EOM A/R	Number of		
					CHG	PAY	ADJ
2014	0.00	0.00	0.00	-47295.70	18	38	10
8 2014	175.00	0.00	0.00	-47295.70	2	0	0
7 2014	-50.00	0.00	0.00	-47470.70	1	0	0
6 2014	1111.00	-167.00	0.00	-47420.70	22	8	0
5 2014	1219.00	-450.00	-60.00	-48364.70	42	10	4
4 2014	-75.00	2.00	0.00	-49073.70	4	9	0
3 2014	1952.64	-2992.36	-2716.64	-49000.70	38	67	45
2 2014	135.00	0.00	0.00	-45244.34	3	0	0
1 2014	6670.00	-311.60	0.00	-45379.34	36	9	0
12 2013	0.00	-21.00	0.00	-51737.74	0	1	0
11 2013	0.00	0.00	0.00	-51716.74	2	4	0
10 2013	500.00	0.00	0.00	-51716.74	7	0	0
9 2013	50.00	0.00	0.00	-52216.74	1	0	0

Record: 1/? <OSC>

Doctor Statistics

- MM1.2





- Query your doctor
- Select the 'Doctor Status Info' tab at the top of the screen or hit F12 on the keyboard

Meddoctr - User

Master Menu > 1 - Master Information Maintenance > 2 - Doctor Master Record Maintenance

Doctor Master Record Maintenance

OFFC Physician Office Test Database

Credentialed	Participating	Doctor Ins Crosswalk	Provider's #	Doctor Statistics Info	Attend Doc Xwalk
Refer Doc Xwalk	Certification Codes				

<p>Group Code: 12</p> <p>Doctor Code: 1</p> <p>Doc Last Name: WASHINGTON M.I. A</p> <p>First Name: GEORGE Title: MD</p> <p>Doctor Name: GEORGE A WASHINGTON MD</p> <p>Address 1: 123 MOUNT VERNON DRIVE</p> <p>Address 2:</p> <p>City: MILTON St: NY</p> <p>Zip Code: 12547</p> <p>Specialty: IM</p> <p>Fee Schedule: 1</p> <p>Participating: <input checked="" type="checkbox"/> Y</p> <p>Payee: <input type="checkbox"/></p> <p>Public Aid Elec.: <input checked="" type="checkbox"/> Y</p> <p>Person: <input checked="" type="checkbox"/> Y</p> <p>Check Eligibility?: <input type="checkbox"/></p> <p>Last Update: 01/21/15 By: AKEL</p>	<p>Telephone: (972) 333 - 0221</p> <p>Fax: () -</p> <p>Soc Sec Num: 111223333</p> <p>Tax Id: 111223333</p> <p>License Num: 9D90303</p> <p>NPI: 1710193990</p> <p>Alt Grp NPI:</p> <p>Department: IM</p> <p>Last Schedule: 10/06/17</p> <p>WCB Rating Code:</p> <p>WCB Auth Num:</p> <p>Resident: <input checked="" type="checkbox"/> Y From: 01/01/01 Through: 01/01/11</p> <p>Active: <input checked="" type="checkbox"/> Y EffDate: 05/01/09</p> <p>Taxonomy: 207V00000X</p> <p>Obstetrics & Gynecology -</p> <p>Link Code: ABC</p> <p>Resource Doc: <input type="checkbox"/> Locum Tenens <input type="checkbox"/></p>
--	--

Meddstat - User

Master Menu > 1 - Master Information Maintenance > 2 - Doctor Master Record Maintenance > F12 - Doctor Statistics

Doctor Statistics

OFFC Physician Office Test Database

Group Code 12 Doctor Code 1 Name GEORGE A WASHINGTON MD

Month to Date

Charges	Payments	Adjustments
.00	.00	.00

Year to Date

Charges	Payments	Adjustments
25.00	.00	.00

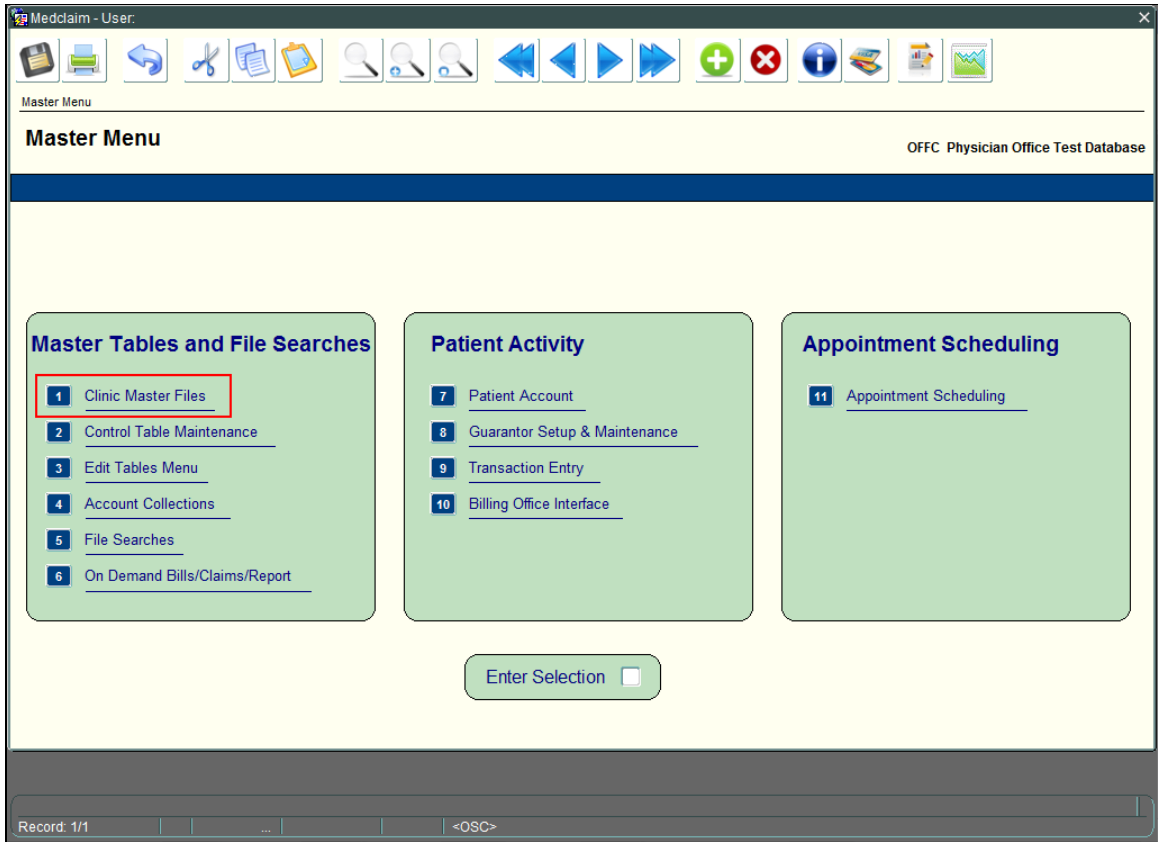
Monthly History

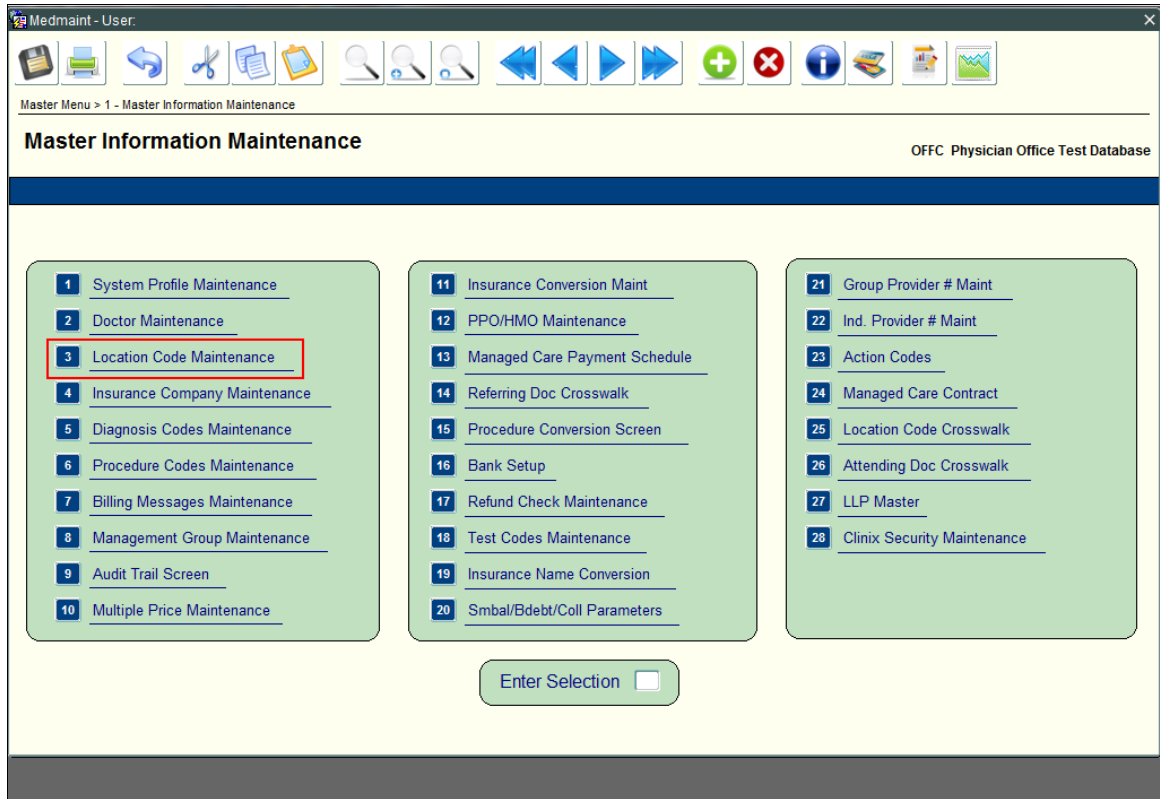
Date	Charges	Payments	Adjustments	EOM A/R
3 2014	1,038.64	-2,942.36	-2,716.64	-339,534.12
4 2014	-75.00	.00	.00	-339,609.12
5 2014	1,000.00	-350.00	-120.00	-339,079.12
6 2014	125.00	.00	.00	-338,954.12
7 2014	-50.00	.00	.00	-339,004.12
8 2014	75.00	.00	.00	-338,929.12
9 2014	.00	.00	.00	-338,929.12

Record: 1/? <OSC>

Location Statistics

- MM1.3





- Query the location
- Select the 'Location Statistics' tab or hit F12 on the keyboard

Medloc - User

Master Menu > 1 - Master Information Maintenance > 3 - Location Codes Maintenance

Location Codes Maintenance

OFFC Physician Office Test Database

Location Statistics

Group Code

Location Code

Location Name

Address 1

Address 2

City St Country

Zip Code RVU Locality

HPSA (Health Professional Shortage Areas)

Telephone Fax

Cla # / HHA #

Link Code

Sched Loc Name

FDA #

Facility

Outside Lab MD Locator Code

NPI

Effective Date

Expiration Date

Updated on By

Record: 1/? <OSC>

Medlstat - User. [Close]

Master Menu > 1 - Master Information Maintenance > 3 - Location Codes Maintenance > F12 - Location Statistics

Location Statistics OFFC Physician Office Test Database

Group Code 12 Location Code 1 Name MAIN LOCATION

Summary Totals

	Charges	Payments	Adjustments
Current Month	.00	.00	.00
Year to Date	125.00	.00	.00

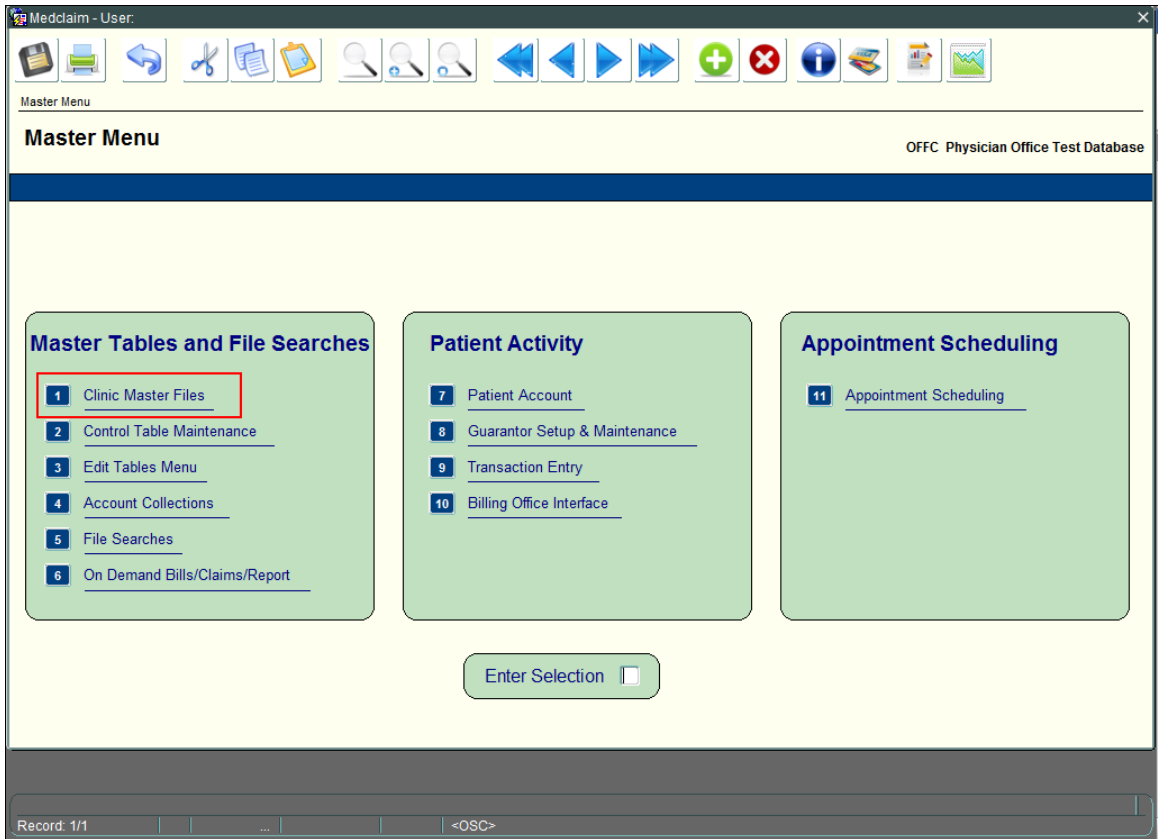
Monthly History

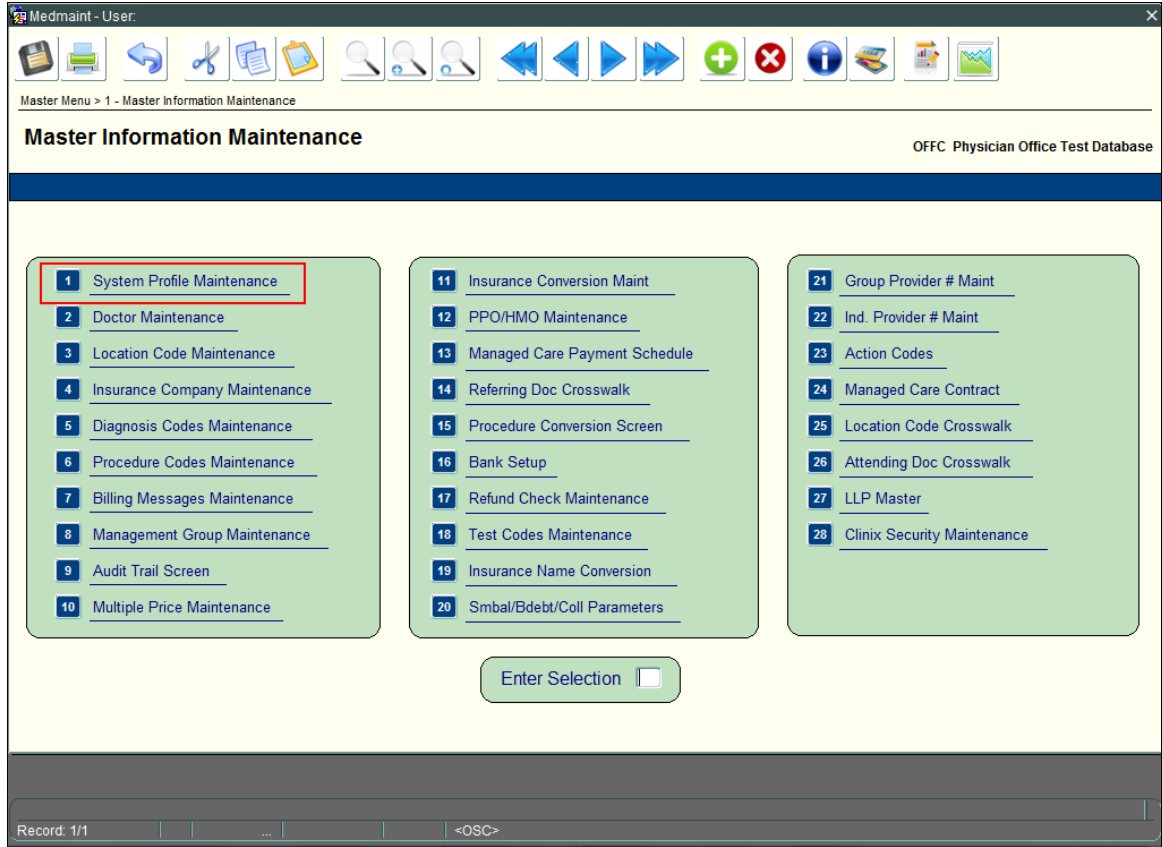
Date	Charges	Payments	Adjustments	EOM A/R
8 2014	.00	.00	.00	-119,100.42
8 2014	175.00	.00	.00	-119,100.42
7 2014	-50.00	.00	.00	-119,275.42
6 2014	831.00	-167.00	.00	-119,225.42
5 2014	1,219.00	-450.00	-60.00	-119,889.42
4 2014	-75.00	2.00	.00	-120,598.42

Record: 1/? ... <OSC>

Client Statistics

- MM1.1





- Query your client code
- Select the 'Client Statistics' tab or hit F12 on the keyboard

Medcprof - User

Master Menu > 1 - Master Information Maintenance > 1 - Client Profile Maintenance

Client Profile Maintenance

OFFC Physician Office Test Database

Client Statistics

Client Code OFFC Client Name PHYSICIAN OFFICE TEST DATABASE Address 1 This Screen Programming Use Address 2 City Nashville St TN Zip Code 37221 Billing Office 888 111 0649 Ext 1259 Contact 595 254 6694 Ext 1264 Fax 555 555 5555 Ext 156	Management Group <input checked="" type="checkbox"/> Y Curryear 2015 Currmonth 9 Automatic Ins Assign <input checked="" type="checkbox"/> Y Auto Ins Code 66 Patient Scheduled Thru 03/25/16 Default Group Code 12 Last Updated 08/17/15 Updated by AKEL	Medicare Pay Medicare Adi Rail Road Pay Rail Road Adi Medicaid Pay Medicaid Adi BCBS Pay BCBS Adi Commercial Pay Commercial Adi
--	--	--

- For a more detailed look broken out by month, select the 'For Monthly History' tab at the top of the screen or hit F12 on the keyboard.

Medcstat - User: [Close]

Master Menu > 1 - Master Information Maintenance > 1 - Client Profile Maintenance > F12 - Client Status

Client Status

OFFC Physician Office Test Database

Monthly History

Number of Cycles Current Cycle Last Daily

Last Cycle Number Last Cycle Last Eom

Balance

Current	Last EOM	Current Year
2,085,279.56	2,084,281.00	2,162,560.57

Month to Date

	Charges	Payments	Adjustments
Amount	3,756.00	-632.50	-2,124.94
Transactions	12	29	7

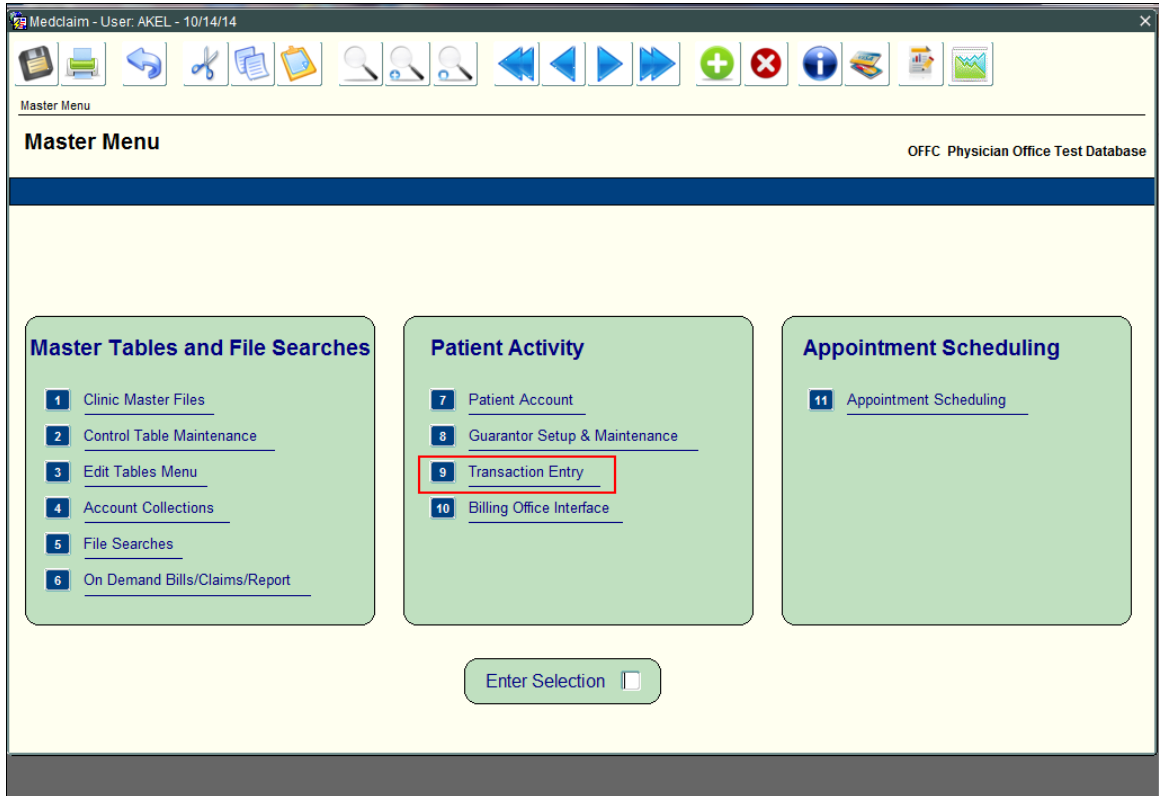
Year to Date

	Charges	Payments	Adjustments
Amount	2,841,264.87	-809,750.69	-2,108,795.19
Transactions	73,697	15,890	24,255

Record: 1/1 | ... | <OSC>

Insurance Claim and Query Maintenance (not based on specific account numbers)

- MM9.7



Medcmenu - User

Master Menu > 9 - Transaction Entry Menu

Transaction Entry Menu

OFFC Physician Office Test Database

Batch

- 1 Batch List
- 2 Batch Control: Charge Entry/Update
- 3 Batch Control: Patient Reception and Open Item Payment/Adjustment Entry

Charge Related

- 4 Remittance Processing
- 5 Suspended Transaction Maintenance
- 6 UB04 Transaction Entry

Miscellaneous

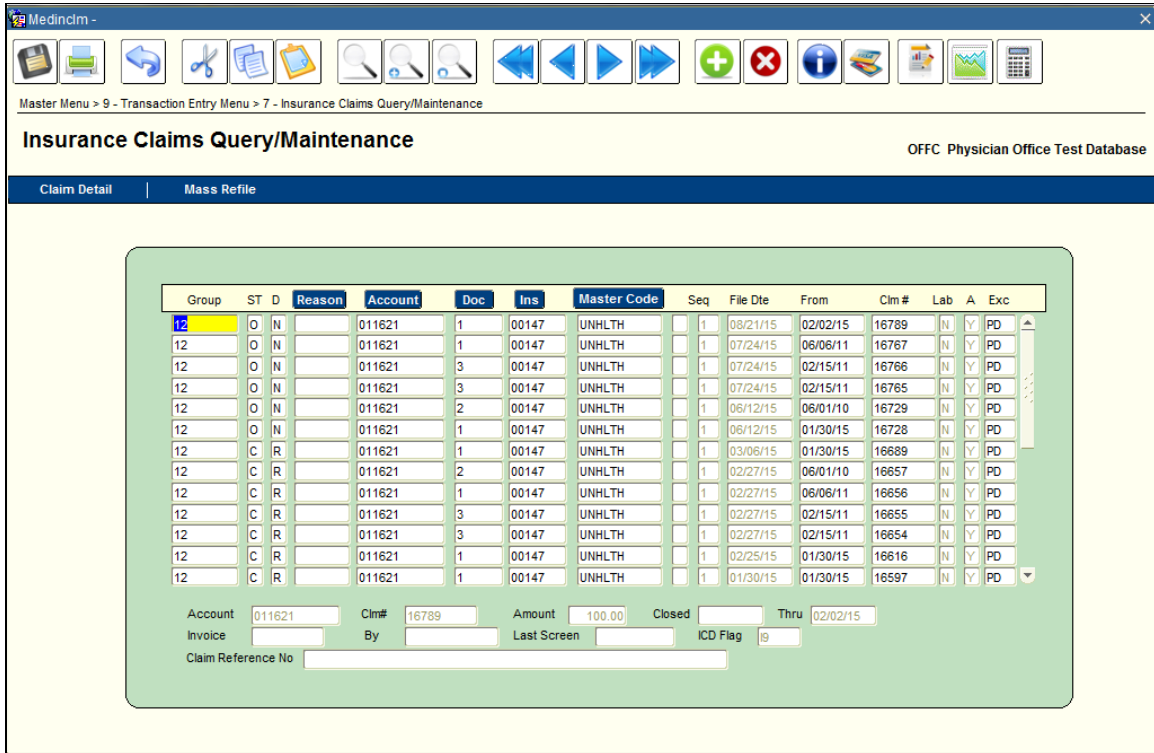
- 7 Insurance Claims Query/Maintenance
- 8 Precertification Maintenance

Enter Selection

Record: 1/1

For Example:

- If you have a specific account that you need to work claims from you can query by that account number.
 - Queried account number 011621



Master Menu > 9 - Transaction Entry Menu > 7 - Insurance Claims Query/Maintenance

Insurance Claims Query/Maintenance OFFC Physician Office Test Database

Claim Detail | Mass Refile

Group	ST	D	Reason	Account	Doc	Ins	Master Code	Seq	File Dte	From	Cim #	Lab	A	Exc
12	O	N		011621	1	00147	UNHLTH	1	08/21/15	02/02/15	16789	N	Y	PD
12	O	N		011621	1	00147	UNHLTH	1	07/24/15	06/06/11	16767	N	Y	PD
12	O	N		011621	3	00147	UNHLTH	1	07/24/15	02/15/11	16766	N	Y	PD
12	O	N		011621	3	00147	UNHLTH	1	07/24/15	02/15/11	16765	N	Y	PD
12	O	N		011621	2	00147	UNHLTH	1	06/12/15	06/01/10	16729	N	Y	PD
12	O	N		011621	1	00147	UNHLTH	1	06/12/15	01/30/15	16728	N	Y	PD
12	C	R		011621	1	00147	UNHLTH	1	03/06/15	01/30/15	16689	N	Y	PD
12	C	R		011621	2	00147	UNHLTH	1	02/27/15	06/01/10	16657	N	Y	PD
12	C	R		011621	1	00147	UNHLTH	1	02/27/15	06/06/11	16656	N	Y	PD
12	C	R		011621	3	00147	UNHLTH	1	02/27/15	02/15/11	16655	N	Y	PD
12	C	R		011621	3	00147	UNHLTH	1	02/27/15	02/15/11	16654	N	Y	PD
12	C	R		011621	1	00147	UNHLTH	1	02/25/15	01/30/15	16616	N	Y	PD
12	C	R		011621	1	00147	UNHLTH	1	01/30/15	01/30/15	16597	N	Y	PD

Account: 011621 Cim#: 16789 Amount: 100.00 Closed: Thru: 02/02/15
 Invoice: By: Last Screen: ICD Flag: 9
 Claim Reference No: _____

- If you have a specific insurance carrier that you need to close and refile claims you can query by that carriers individual key code.
 - Queried key code 01026

Medindcm -

Master Menu > 9 - Transaction Entry Menu > 7 - Insurance Claims Query/Maintenance

Insurance Claims Query/Maintenance

OFFC Physician Office Test Database

Claim Detail | Mass Refile

Group	ST	D	Reason	Account	Doc	Ins	Master Code	Seq	File Dte	From	Cim #	Lab	A	Exc
12	O	N		1040	1	01026	COMM	1	08/28/15	06/25/15	16799	N	Y	CP
12	C	R		836	2	01026	COMM	1	08/29/14	04/04/04	16523	N	Y	CP
12	O	N		730	4	01026	COMM	2	03/15/13	03/03/03	16395	N	Y	CP
12	C	Y		730	4	01026	COMM	2	03/15/13	03/03/03	16394	N	Y	CP
12	O	N		902	12	01026	COMM	2	03/15/13	03/25/03	16393	N	Y	CP
12	C	Y		902	12	01026	COMM	2	03/15/13	03/25/03	16392	N	Y	CP
12	O	N		883	13	01026	COMM	2	03/15/13	03/26/03	16391	N	Y	
12	O	N		883	7	01026	COMM	2	03/15/13	07/31/03	16390	N	Y	
12	C	Y		883	7	01026	COMM	2	03/15/13	07/31/03	16389	N	Y	
12	O	N		731	6	01026	COMM	2	03/15/13	03/04/03	16388	N	Y	CP
12	O	N		827	12	01026	COMM	2	03/15/13	03/25/03	16387	N	Y	PD
12	C	Y		827	12	01026	COMM	2	03/15/13	03/25/03	16386	N	Y	PD
12	O	N		728	2	01026	COMM	2	03/15/13	03/03/03	16385	N	Y	CP

Account 1040 Cim# 16799 Amount 250.00 Closed Thru 06/25/15
 Invoice By Last Screen ICD Flag 10
 Claim Reference No

- If you would like to see all the claims filed within a certain month and year. For example, January of 2011 you need to enter 0111 in the 'File Date' field. You do not need to use the percent signs in that field.
 - Queried File date of 0114

Medindm - User

Master Menu > 9 - Transaction Entry Menu > 7 - Insurance Claims Query/Maintenance

Insurance Claims Query/Maintenance

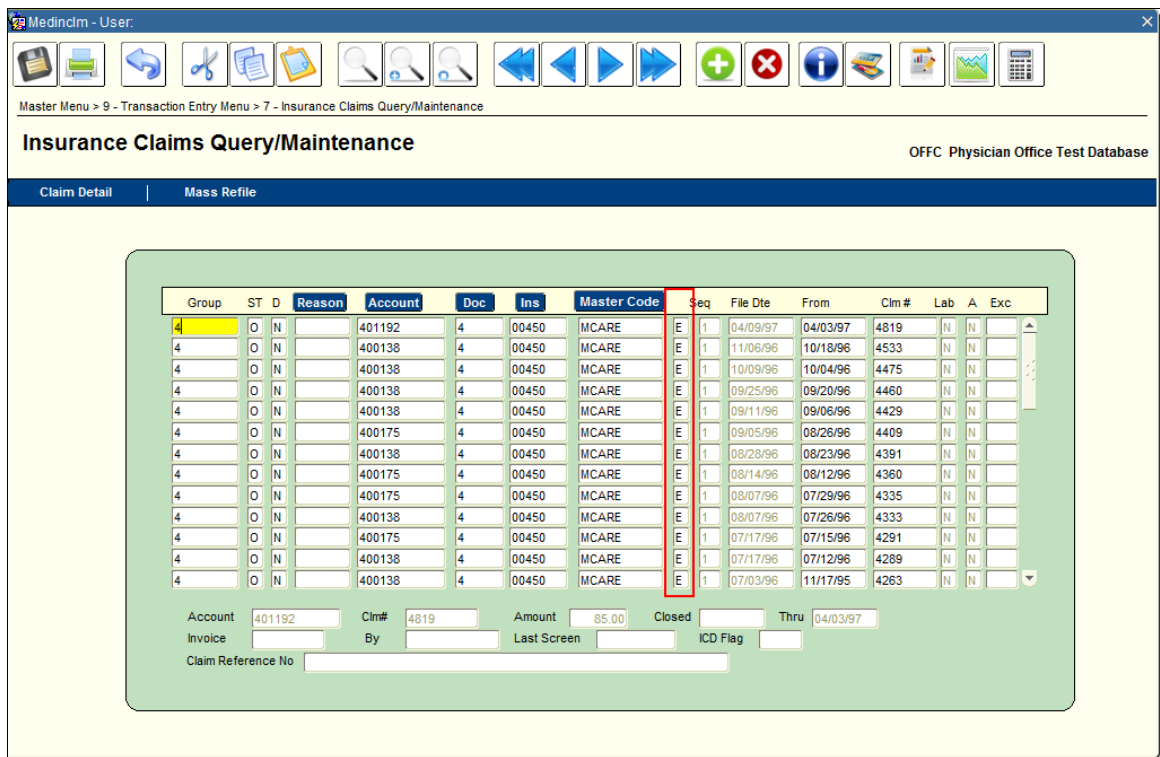
OFFC Physician Office Test Database

Claim Detail | Mass Refile

Group	ST	D	Reason	Account	Doc	Ins	Master Code	Seq	File Dte	From	Clm #	Lab	A	Exc
12	O	N		010101	1	UNHLT	COMM		1	01/24/14	09/01/13	16467	N	Y
12	O	N		12345	4	01233	CIGNA		1	01/24/14	06/12/13	16463	N	Y
12	O	N		1149	1	00455	MCARE		1	01/24/14	09/09/13	16462	N	Y
12	O	N		28	1	00043	CIGNA		1	01/24/14	09/13/13	16461	N	Y
12	O	N		28	1	00043	CIGNA		1	01/24/14	09/09/13	16460	N	Y
12	O	N		28	1	00043	CIGNA		1	01/24/14	10/02/13	16459	N	Y
12	O	N		1001	1	TX1	MGCINS		1	01/24/14	10/01/13	16458	N	Y
12	O	N		1434	1	SARAH	COMM		1	01/24/14	09/09/13	16457	N	Y
12	C	N		8001	1	BTX	BCBS		1	01/24/14	11/13/13	16456	N	Y
12	C	Y		01026	1	00450	MCARE		1	01/24/14	06/12/13	16455	N	Y
12	C	N		01026	1	00450	MCARE		1	01/24/14	10/15/13	16454	N	Y
12	C	Y		01026	1	00450	MCARE		1	01/24/14	09/01/13	16453	N	Y
12	O	N		1001	1	TX1	MGCINS		1	01/10/14	09/01/13	16452	N	Y

Account 010101 Clm# 16467 Amount 75.00 Closed Thru 09/01/13
 Invoice By Last Screen ICD Flag
 Claim Reference No

- If you want to double check that your claims for a specific carrier are filing electronic or paper you can query by key code. The column that does not have a header shows how a claim was filed.
 - Appropriate Codes
 - E=Electronic to Medicare
 - N=Electronic via NEIC (Emdeon)
 - B=Electronic to Blue Cross Blue Shield
 - C= Electronic to Medicaid
 - Blank=Paper



Insurance Claims Query/Maintenance OFFC Physician Office Test Database

Claim Detail | Mass Refile

Group	ST	D	Reason	Account	Doc	Ins	Master Code	Seq	File Dte	From	Clm #	Lab	A	Exc
4	O	N		401192	4	00450	MCARE	E	1	04/09/97	04/03/97	4819	N	N
4	O	N		400138	4	00450	MCARE	E	1	11/06/96	10/18/96	4533	N	N
4	O	N		400138	4	00450	MCARE	E	1	10/09/96	10/04/96	4475	N	N
4	O	N		400138	4	00450	MCARE	E	1	09/25/96	09/20/96	4460	N	N
4	O	N		400138	4	00450	MCARE	E	1	09/11/96	09/06/96	4429	N	N
4	O	N		400175	4	00450	MCARE	E	1	09/05/96	08/26/96	4409	N	N
4	O	N		400138	4	00450	MCARE	E	1	08/28/96	08/23/96	4391	N	N
4	O	N		400175	4	00450	MCARE	E	1	08/14/96	08/12/96	4360	N	N
4	O	N		400175	4	00450	MCARE	E	1	08/07/96	07/29/96	4335	N	N
4	O	N		400138	4	00450	MCARE	E	1	08/07/96	07/26/96	4333	N	N
4	O	N		400175	4	00450	MCARE	E	1	07/17/96	07/15/96	4291	N	N
4	O	N		400138	4	00450	MCARE	E	1	07/17/96	07/12/96	4289	N	N
4	O	N		400138	4	00450	MCARE	E	1	07/03/96	11/17/95	4263	N	N

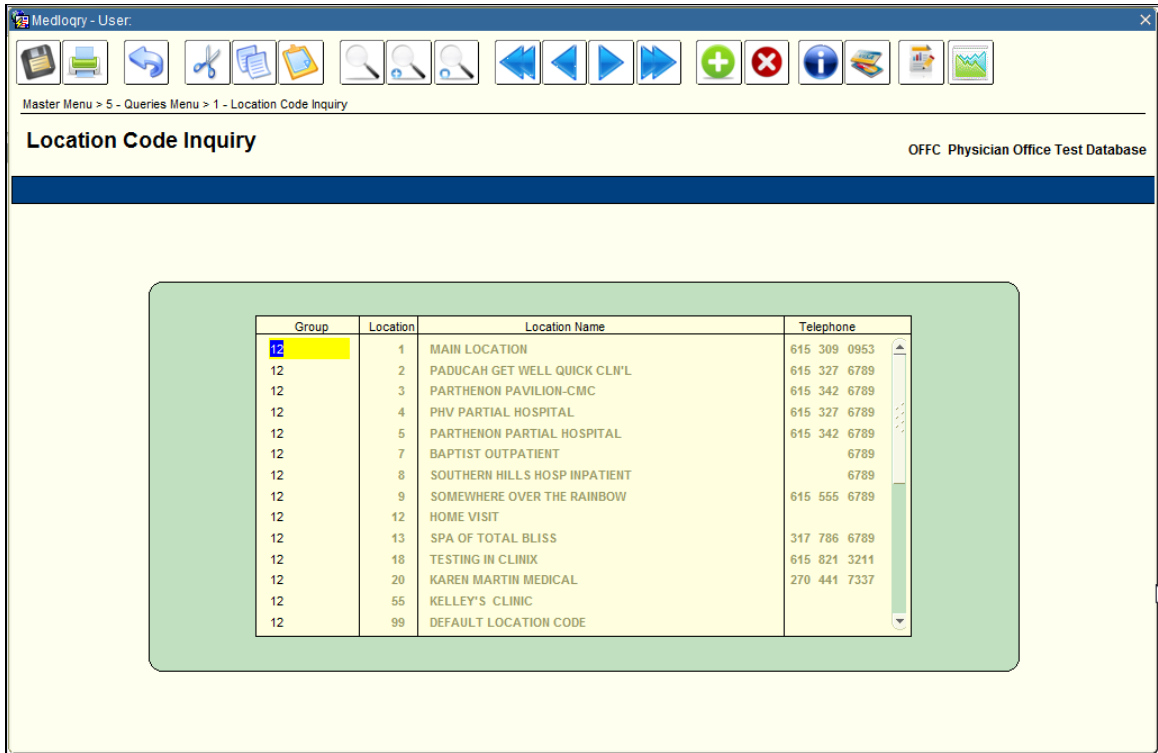
Account: 401192 Clm#: 4819 Amount: 85.00 Closed: Thru: 04/03/97
 Invoice: By: Last Screen: ICD Flag:
 Claim Reference No: _____

To perform an advanced query on all claims that are being filed paper you need to:

- Start your query
- Enter the '&' symbol in the column highlighted in the red box above
- Execute your query
- You will see a pop up box appear
- Enter '&' is null and click ok

You can perform the above query in conjunction with account numbers, insurance carriers, file dates, etc.

- MM5.1 - Location Code Inquiry
 - This screen shows the different locations that have been setup in a specific database.

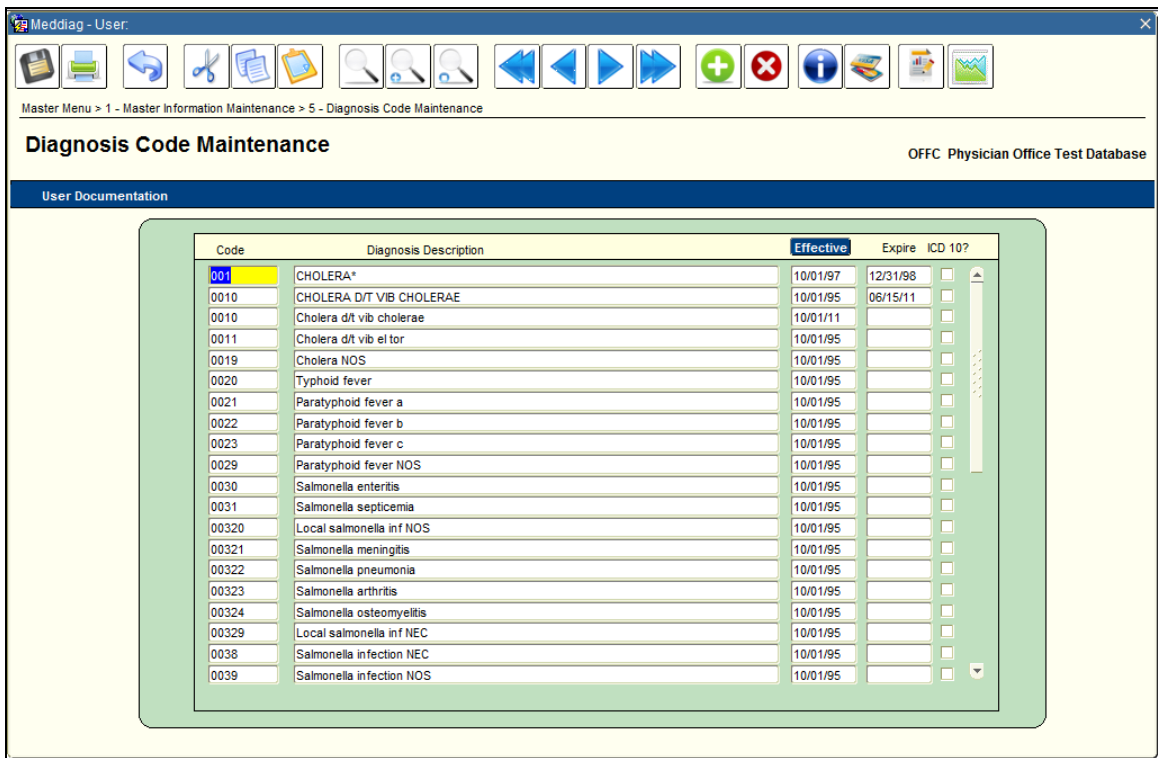


Master Menu > 5 - Queries Menu > 1 - Location Code Inquiry

Location Code Inquiry OFFC Physician Office Test Database

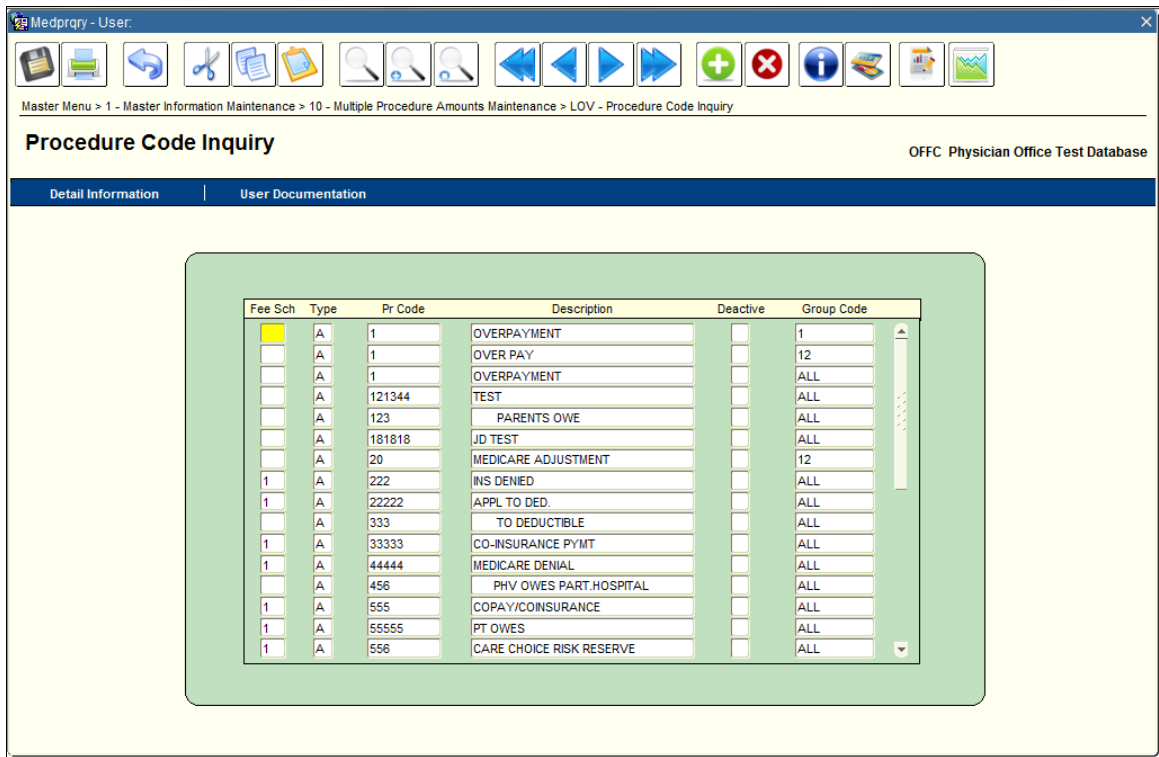
Group	Location	Location Name	Telephone
12	1	MAIN LOCATION	615 309 0953
12	2	PADUCAH GET WELL QUICK CLIN'L	615 327 6789
12	3	PARTHENON PAVILION-CMC	615 342 6789
12	4	PHV PARTIAL HOSPITAL	615 327 6789
12	5	PARTHENON PARTIAL HOSPITAL	615 342 6789
12	7	BAPTIST OUTPATIENT	6789
12	8	SOUTHERN HILLS HOSP INPATIENT	6789
12	9	SOMEWHERE OVER THE RAINBOW	615 555 6789
12	12	HOME VISIT	
12	13	SPA OF TOTAL BLISS	317 786 6789
12	18	TESTING IN CLINIX	615 821 3211
12	20	KAREN MARTIN MEDICAL	270 441 7337
12	55	KELLEY'S CLINIC	
12	99	DEFAULT LOCATION CODE	

- MM1.5 - Diagnosis Code Maintenance
 - This screen shows all the diagnosis codes that have been loaded by Clinix including their effective and expiration dates.



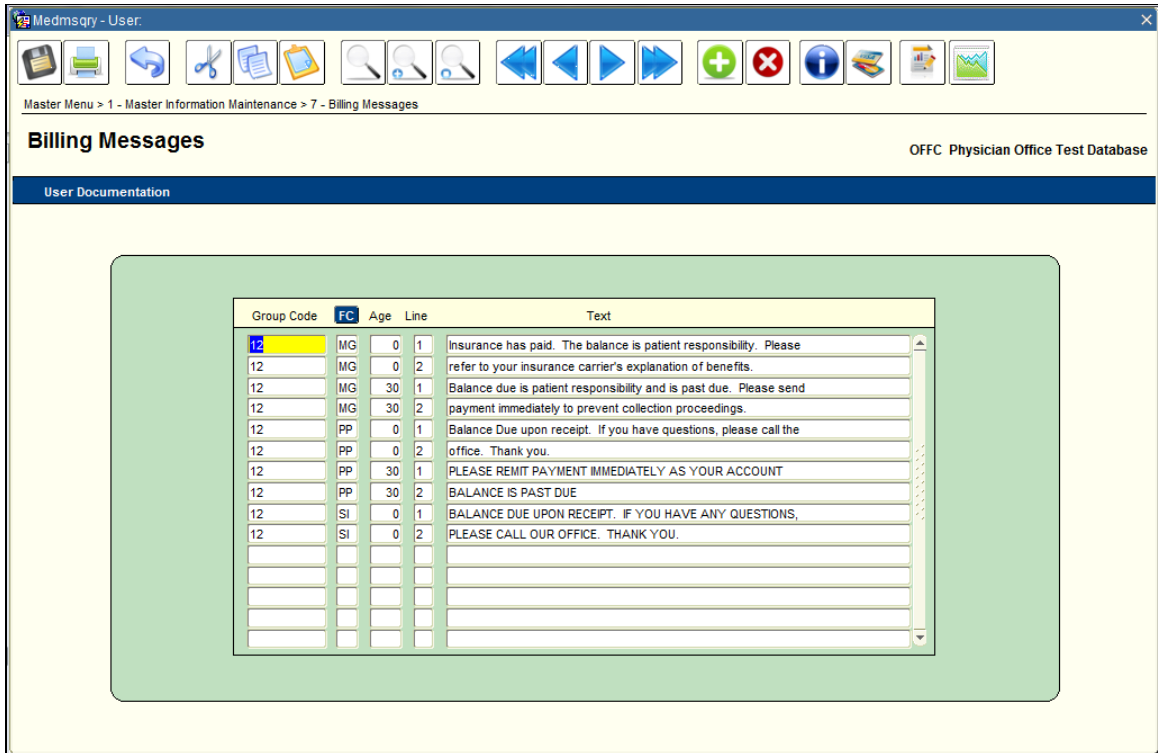
Code	Diagnosis Description	Effective	Expire	ICD 10?
001	CHOLERA*	10/01/97	12/31/98	<input type="checkbox"/>
0010	CHOLERA D/T VIB CHOLERAЕ	10/01/95	06/15/11	<input type="checkbox"/>
0010	Cholera d/t vib cholerae	10/01/11		<input type="checkbox"/>
0011	Cholera d/t vib el tor	10/01/95		<input type="checkbox"/>
0019	Cholera NOS	10/01/95		<input type="checkbox"/>
0020	Typhoid fever	10/01/95		<input type="checkbox"/>
0021	Paratyphoid fever a	10/01/95		<input type="checkbox"/>
0022	Paratyphoid fever b	10/01/95		<input type="checkbox"/>
0023	Paratyphoid fever c	10/01/95		<input type="checkbox"/>
0029	Paratyphoid fever NOS	10/01/95		<input type="checkbox"/>
0030	Salmonella enteritis	10/01/95		<input type="checkbox"/>
0031	Salmonella septicemia	10/01/95		<input type="checkbox"/>
00320	Local salmonella inf NOS	10/01/95		<input type="checkbox"/>
00321	Salmonella meningitis	10/01/95		<input type="checkbox"/>
00322	Salmonella pneumonia	10/01/95		<input type="checkbox"/>
00323	Salmonella arthritis	10/01/95		<input type="checkbox"/>
00324	Salmonella osteomyelitis	10/01/95		<input type="checkbox"/>
00329	Local salmonella inf NEC	10/01/95		<input type="checkbox"/>
0038	Salmonella infection NEC	10/01/95		<input type="checkbox"/>
0039	Salmonella infection NOS	10/01/95		<input type="checkbox"/>

- MM1.10- Procedure Code Inquiry
 - This screen shows all payment, adjustment, and charge procedure codes that have been setup in a specific database in Master Menu 1.6. These can be viewed based on fee schedule, type of transaction (P,A, or C), procedure code, description, or group code.
 - You can select the Detailed Information tab at the top for more information on a specific entry



Fee Sch	Type	Pr Code	Description	Deactive	Group Code
<input type="checkbox"/>	A	1	OVERPAYMENT	<input type="checkbox"/>	1
<input type="checkbox"/>	A	1	OVER PAY	<input type="checkbox"/>	12
<input type="checkbox"/>	A	1	OVERPAYMENT	<input type="checkbox"/>	ALL
<input type="checkbox"/>	A	121344	TEST	<input type="checkbox"/>	ALL
<input type="checkbox"/>	A	123	PARENTS OWE	<input type="checkbox"/>	ALL
<input type="checkbox"/>	A	181818	JD TEST	<input type="checkbox"/>	ALL
<input type="checkbox"/>	A	20	MEDICARE ADJUSTMENT	<input type="checkbox"/>	12
1	A	222	INS DENIED	<input type="checkbox"/>	ALL
1	A	22222	APPL TO DED.	<input type="checkbox"/>	ALL
<input type="checkbox"/>	A	333	TO DEDUCTIBLE	<input type="checkbox"/>	ALL
1	A	33333	CO-INSURANCE PYMT	<input type="checkbox"/>	ALL
1	A	44444	MEDICARE DENIAL	<input type="checkbox"/>	ALL
<input type="checkbox"/>	A	456	PHV OWES PART HOSPITAL	<input type="checkbox"/>	ALL
1	A	555	COPAY/COINSURANCE	<input type="checkbox"/>	ALL
1	A	55555	PT OWES	<input type="checkbox"/>	ALL
1	A	556	CARE CHOICE RISK RESERVE	<input type="checkbox"/>	ALL

- MM 1.7- Billing Messages
 - This screen shows the different billing messages that have been setup in a specific database.



Master Menu > 1 - Master Information Maintenance > 7 - Billing Messages

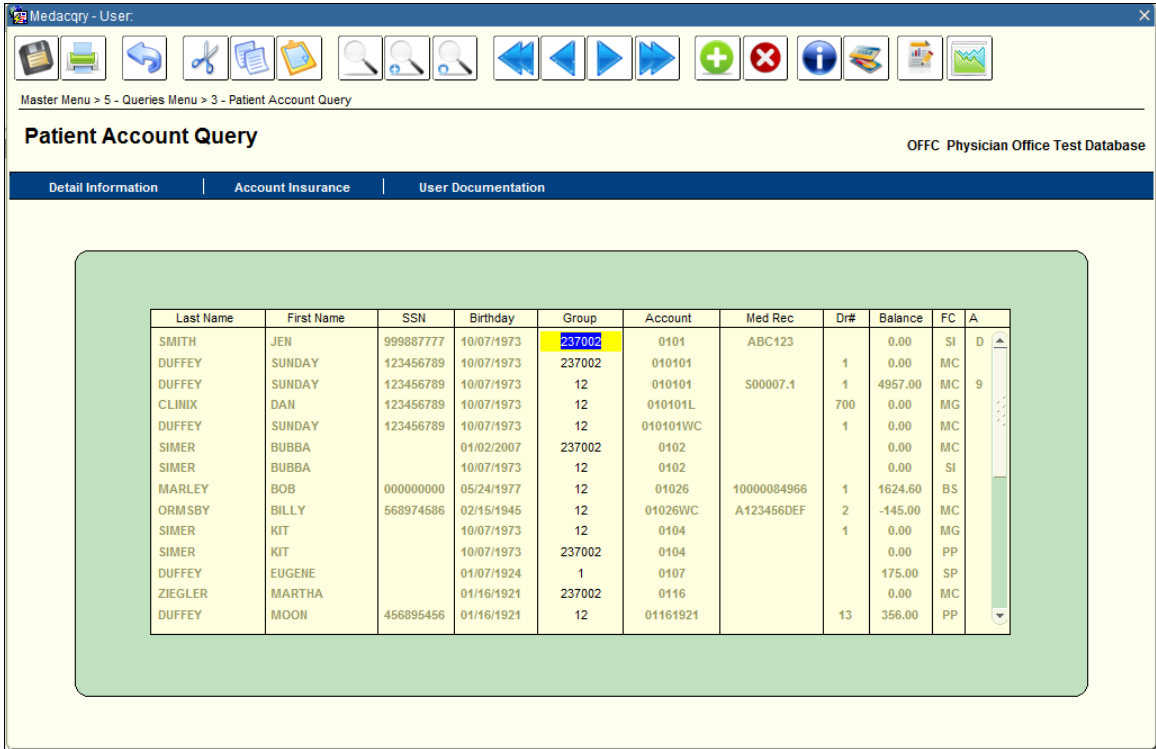
Billing Messages OFFC Physician Office Test Database

User Documentation

Group Code	FC	Age	Line	Text
12	MG	0	1	Insurance has paid. The balance is patient responsibility. Please
12	MG	0	2	refer to your insurance carrier's explanation of benefits.
12	MG	30	1	Balance due is patient responsibility and is past due. Please send
12	MG	30	2	payment immediately to prevent collection proceedings.
12	PP	0	1	Balance Due upon receipt. If you have questions, please call the
12	PP	0	2	office. Thank you.
12	PP	30	1	PLEASE REMIT PAYMENT IMMEDIATELY AS YOUR ACCOUNT
12	PP	30	2	BALANCE IS PAST DUE
12	SI	0	1	BALANCE DUE UPON RECEIPT. IF YOU HAVE ANY QUESTIONS,
12	SI	0	2	PLEASE CALL OUR OFFICE. THANK YOU.

- MM5.3- Patient Account Query

- This screen shows patient accounts that have been setup in a specific database in Master Menu 4. You can query based on last name, first name, SSN, date of birth, group code, account number, medical record number (if stored in Clinix), doctor, balance, financial class, or if the patients are active vs. deactive.
- You can select the Detail Information tab at the top for the detailed account information on a specific patient.
- You can select the Account Insurance tab at the top for the insurance information related to a specific patient.



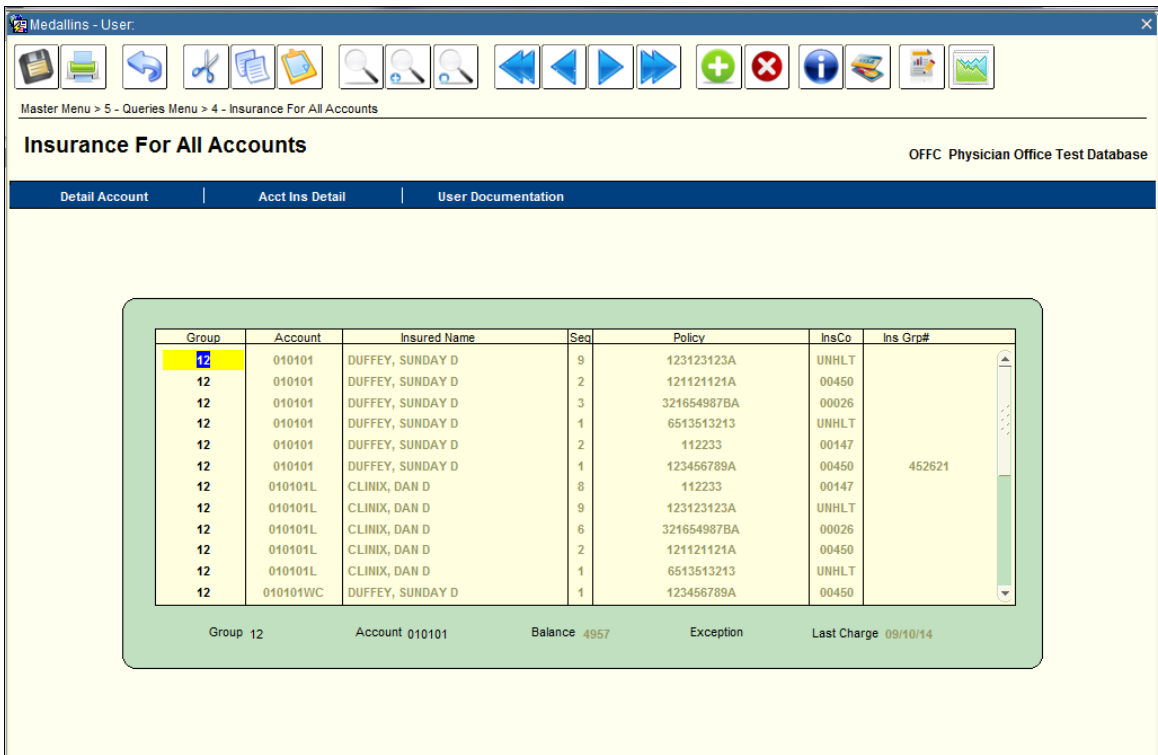
Master Menu > 5 - Queries Menu > 3 - Patient Account Query

Patient Account Query OFFC Physician Office Test Database

Detail Information | Account Insurance | User Documentation

Last Name	First Name	SSN	Birthday	Group	Account	Med Rec	Dr#	Balance	FC	A
SMITH	JEN	999887777	10/07/1973	237002	0101	ABC123		0.00	SI	D
DUFFEY	SUNDAY	123456789	10/07/1973	237002	010101		1	0.00	MC	
DUFFEY	SUNDAY	123456789	10/07/1973	12	010101	S00007.1	1	4957.00	MC	9
CLINIX	DAN	123456789	10/07/1973	12	010101L		700	0.00	MG	
DUFFEY	SUNDAY	123456789	10/07/1973	12	010101WC		1	0.00	MC	
SIMER	BUBBA	01/02/2007		237002	0102			0.00	MC	
SIMER	BUBBA	10/07/1973		12	0102			0.00	SI	
MARLEY	BOB	000000000	05/24/1977	12	01026	10000084966	1	1624.60	BS	
ORMSBY	BILLY	568974586	02/15/1946	12	01026WC	A123456DEF	2	-145.00	MC	
SIMER	KIT		10/07/1973	12	0104		1	0.00	MG	
SIMER	KIT		10/07/1973	237002	0104			0.00	PP	
DUFFEY	EUGENE		01/07/1924	1	0107			175.00	SP	
ZIEGLER	MARTHA		01/16/1921	237002	0116			0.00	MC	
DUFFEY	MOON	456895456	01/16/1921	12	01161921		13	356.00	PP	

- MM5.4 Insurance for All Accounts
 - This screen shows insurance for all patients in a specific database. You can query by group, account number, insured name, insurance sequence, policy number, insurance key code,
 - You can select the Detail Account tab at the top for the detailed account information on a specific patient.
 - You can select the Acct Ins Detail tab at the top for the insurance information related to a specific patient
 - At the bottom of the screen you can see additional information such as the group, account number, patient balance, the exception code on the account, and the date of the charge.



Master Menu > 5 - Queries Menu > 4 - Insurance For All Accounts

Insurance For All Accounts OFFC Physician Office Test Database

Detail Account | Acct Ins Detail | User Documentation

Group	Account	Insured Name	Seq	Policy	InsCo	Ins Grp#
12	010101	DUFFEY, SUNDAY D	9	123123123A	UNHLT	
12	010101	DUFFEY, SUNDAY D	2	121121121A	00450	
12	010101	DUFFEY, SUNDAY D	3	321654987BA	00026	
12	010101	DUFFEY, SUNDAY D	1	6513513213	UNHLT	
12	010101	DUFFEY, SUNDAY D	2	112233	00147	
12	010101	DUFFEY, SUNDAY D	1	123456789A	00450	452621
12	010101L	CLINIX, DAN D	8	112233	00147	
12	010101L	CLINIX, DAN D	9	123123123A	UNHLT	
12	010101L	CLINIX, DAN D	6	321654987BA	00026	
12	010101L	CLINIX, DAN D	2	121121121A	00450	
12	010101L	CLINIX, DAN D	1	6513513213	UNHLT	
12	010101WC	DUFFEY, SUNDAY D	1	123456789A	00450	

Group 12 Account 010101 Balance 4957 Exception Last Charge 09/10/14

Reasons why Insurance claims dropped to paper rather than file electronically

A. Master Tables

- Insurance Master File, MM1.4
 1. Electronic: null or N
 2. Form Type: null or incorrect – If this carrier not set up on EMC table, form type must be 15.
 3. Payor number: null or incorrect
 4. Return Claim: R to return the claim
 5. When BS, Insurance type must be BS
 6. Any keycode with form type 64 (MI BCBS) must have either BL, HM, MB, or OF in the TP # field in order to go electronically.
 1. BL means blue shield.
 2. HM means blue care network.
 3. MB means medicare advantage.
 4. OF means federal
- 2. Doctor Master Record Maintenance, MM1.2
 1. Electronic Filing fields =N
- 3. Procedure Maintenance, MM1.6
 1. Electronic Filing fields =N
- 4. Location Code Maintenance, MM1.3
 1. The address of location is null and the place of service on the charge is something other than 12 (Home)
 2. The address line 1 is null
- 5. Financial Class, MM 2.1
 1. A 'B' needs to be in the 'OT' field if the financial represents a BCBS carrier
 2. Must be flagged under the appropriate carrier code MC, MD, OT = B for the EMC program to know to file electronically

****Note:** Clinix identifies that a claim is Medicare, Medicaid or BS by Instype on MM2.1.

B. Patient Insurance Record

1. Return field =R
2. Medicaid Primary, Medicare secondary (Medicaid should never be primary when the patient has other insurance)
3. Zip code on the patient's insurance record is not 5 or 9 digits on USA addresses. It rejected for reason 02. This is considered a syntax error which would make the entire electronic file reject.
4. If Medicaid is primary and they have a secondary insurance the primary won't file electronic.
5. If the sum of the insurance payment/adjustment are equal to or greater than the charge, a secondary claim will not open
6. The Insurance sequence is anything other than an on (1) or two (2)

C. EMC Table Program

1. Medicare, Medicaid and Blue Shield need to be in this table. (Notify Paducah as this table is not available to the user)



Reasons why an Electronic EOB did not generate

A. Master Tables

- Insurance Master File, MM1.4, page 2
 - EOB: null, N, or P
 - No secondary claim generated, only the claim record (medigap, crossover)

B. Other

- Payment Posting
 - Poster did not post an Allowed, co-insurance, co-pay or deductible
 - If Medicare paid primary, ICN number was not posted
 - Primary Payor denied payment for reasons other than allowed, co-insurance, co-pay or deductible
 - Payment not allocated
- MISC
 - EOB's are not created for tertiary insurance sequence's



Reasons why Insurance claims didn't generate

Medacct, MM7 *	Patient Account Registration	Financial Class is set to not print a claim
Medacct, MM7	Patient Account Registration	Exception Code is set to not print a claim
Medacins, MM7, F8	Patient Insurance Record	Auto Print Insurance field = N
Medacins, MM7, F8 *	Patient Insurance Record	Insurance Type is set to not print a claim
Medins, MM1, 4	Insurance Company Maintenance	Form Type = XX
Medins, MM1, 4 and Medacins, MM7, F8	Insurance Company Maintenance and Patient Insurance Record	Form Type = 16 and Patient's Insurance Record has field "Return" set to R
Meddoctr MM1.2	Doctor Master File	Public Aid Electronic = N
Medoidet, MM7, Shift F8	Account Detail Information	Insurance Type is set to not print a claim
Medoidet, MM7, Shift F8	Account Detail Information	All Charge transaction have a zero price
Medoidet, MM7, Shift F8/ Medacins, MM1, 4	Account Detail Information and Patient Insurance Record	Ins Filing Sequence set to sequence that has no insurance
Medtranu or Medtrang, MM7, Shift F8, F11	Transaction Update	File claim field changed to N. When this happens, it can only be identified by Programming
Medgrpg2, MM1, 8, F8 *	Management Group Profile Maintenance, page 2	Automatic Insurance Field does not have a Y
Medproc, MM1, 6	Procedure Maintenance	Bill Medicaid field = N; this will not allow a charge to bill to Medicaid. If that is the only charge, a claim will not generate.
Medacct, MM7 *	Patient Account Registration	Financial Class is set to not print a claim

* **Note:** Insurance Program does not look directly at these form fields



Reason why a statement or collection letter did not generate

Medacct, MM7	Patient Account Registration	Financial Class is set to not print a statement
Medacct, MM7	Patient Account Registration	Exception code is set to not print a statement
Medacct, MM7	Patient Account Registration	Hold field has a Y or number
Medqacct	Guarantor Setup/Maintenance	If a new account and a cycle has not occurred since the charge has been entered.
Medgrppr, MM1, 8	Management Group Profile Maintenance	Account age reached maximum bills as indicated
Medastat, MM7, Ctr g	Account Summary	Insurance Balance is greater than the account balance
Medgrppr	Management Group Profile Maintenance	Patient balance is less than the Minimum Bill Amount.
Medgrppr, MM1, 8	Management Group Profile Maintenance	Collection Letter days is larger than Maximum bills
Medqguar	Guarantor Setup/Maintenance	Maximum patient billings equals patient billings
Medqguar	Guarantor Setup/Maintenance	Hold statement Y or number

* **Note:** Statement will be deferred when payment or adjustment is pending or rejection code states not to bill patient. Rejection code 06 always defers a statement.