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		
Account	(medguar)		
Guar/In Code	Guarantor number		
п	Financial Class		
EX	Exception Code		
н	Hold statement		
R			
	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		
м	ʻgenirej'.		
S			
Date	MMDDYY Change occurred		
	An "/" 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		
A(ction)	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			
	Insured name or 'Return Once' if user set key			
	code to return claims in paper format as a one-			
Name	time only request			
Account	Account number			
	Insurance Company Key Code number and			
Guar/In Code	previous Insurance effective date.			
п	Insurance Type			
EX	Blank			
Н	Accept Assignment			
R				
м	Auto Print Insurance			
S	Insurance Sequence			
Date	MMDDYY Change occurred			
	An "/" 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			
А	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		
Н	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			
	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		
Cd	the EMR.		
Name	Account name		
Account	Account number		
Guar/In Code	Medical record number received from EMR		
п	Financial Class		
EX	Exception Code		
Н	Hold statement		
R			
М			
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		
Н			
R			
М			
S	Insurance Sequence image is linked to		
Date	MMDDYY Date of scan		
	"I"= inserting a scanned image, "D"=deleting a		
A	scanned image, "U"=updating an image		
Time	Time the scan took place.		
ChangeBy	"SCAN"		

Close and Refile Claim				
	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			
Cd	claim.			
Name	Account name			
Account	Account number			
Guar/In Code	Insurance key code and Guarantor number			
IT	Insurance Type			
EX	Blank			
Н	Y			
R				
М	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				
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				
Cd	transaction update.			
Name	Account name			
Account	Account number			
Guar/In Code	Insurance key code and Effective Date			
IT	Insurance Type			
EX				
Н	Y			
R				
М	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

	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		
Cd	transaction update.		
Name	Insured name		
Account	Account number		
Guar/In Code	Insurance Key Code and Effective Date		
IT	Insurance Type		
EX			
Н	Y		
R			
М	Y		
S	Insurance Sequence image is linked to		
Date	MMDDYY Date change occurred		
А	Blank		
Time	Time change took place.		
ChangeBy	The Username that made the change		



How to allocated a payment to a charge

• MM9.3

🗑 Medclaim - User: 🗙 🗙					
Master Menu					
Master Menu		OFFC Physician Office Test Database			
Master Tables and File Searches	Patient Activity	Appointment Scheduling			
1 Clinic Master Files	7 Patient Account	11 Appointment Scheduling			
Control Table Maintenance	Guarantor Setup & Maintenance				
3 Edit Tables Menu	9 Transaction Entry				
Account Collections	10 Billing Office Interface				
5 File Searches					
6 On Demand Bills/Claims/Report					
	Enter Selection				
Record: 1/1	<0SC>				



🙀 Medcmenu - User:		×
Master Menu > 9 - Transaction Entry Menu		3 🕕 🥌 ጅ 🔛
Transaction Entry Menu		
,		OFFC Physician Office Test Database
Batch	Charge Related	Miscellaneous
Batch List	4 Remittance Processing	7 Insurance Claims Query/Maintenance
2 Batch Control: Charge Entry/Update	5 Suspended Transaction Maintenance	8 Precertification Maintenance
Batch Control: Patient Reception and Open	6 UB04 Transaction Entry	
Item Payment/Adjustment Entry		
	Į į	
	Enter Selection	
Record: 1/1	<osc></osc>	



• Query for an existing batch or create a new batch

🙀 Medoibatch - User:					×
Master Menu > 9 - Transac	ion Entry Menu > 3 - Batch Contr			€ 8 € ≪	
Batch Control					OFFC Physician Office Test Database
Transaction Entry	Auto Distribution	Batch Edit Payme	ent/Adjustment Entry	Multi-Payment/Adjustment Entry	Open Item Posting Menu
Group Code Batch 1	Number Date Last Update 1292 10/13/14 10/13/14	d Time User ID 10:38:08 A.M. AKEL		Comment	
Depos		Transaction Total	Lock Box ID Bank Batch ID	Hash Total Batch Balance Allocated Amount Unallocated Amount	
Payments Adjustments Charges	Control Totals Actual a 0.00	Amounts Variance 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00	Batch Sta Batch Po Batch Po	st Month 10	e for Editing, R - Release for Posting)
Record: 1/1		<09C>			



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

🔋 Medoibatch - User:	100				2 3 3 3	×
Master Menu > 9 - Transacti						
Batch Control						OFFC Physician Office Test Database
Transaction Entry	Auto Distributi	on Batch Edit	Payment/Adj	ustment Entry Mul	ti-Payment/Adjustment Entry	Open Item Posting Menu
Group Code Batch N		st Updated Time 0/13/14 10:38:08 A.M.	User ID AKEL		Comment	
Deposi		Transaction Total Number of Accounts	_	Box ID Batch ID	Hash Total Batch Balance Allocated Amount Unallocated Amount	0.00 0.00 0.00
Payments	Control Totals	Actual Amounts Var	iance 0.00	Batch Status		e for Editing, R - Release for Posting)
Adjustments Charges	0.00	0.00	0.00	Batch Post Mo Batch Post Ye		
Record: 1/1		<	OSC>			



• Select item #4- Pmt/Adj Allocation

Image: Sector	OFFC Physician Office Test Database
 Cal Pay/Adj By Claim Pmts/Adjs By Charge Reallocate Previous Postings Pmt/Adj Allocation New Pmt/Adj Allocation 	
Enter Selection	



• Enter in the account number <Tab or Enter>

Payment/Adj	ustmen	nt All	ocatio	n									OFFC Physician Office Te
Previous Block	Detail	Trans		Clear Scree	en	N	ext Block						
	Γ	Group	12	E	latch	1292	Accou	nt 01	026	MARLEY	, BOB		7
	L	Unalloc	ated Amt	-1538.00			Balanc						
		Svc	Date	St Ins	Ту	1	cated Payme		ijustments escription	\$		Amount	
	•	05/08	_	н	Ρ	COPAY	PATIENT CO						Unalloc. Amt.
		05/01		H 00450	P		CHECK PAY MEDICARE P		NT-MEDICA	RE		-10.00	•
		10/15		P 00450	A		MEDICARE A		DICARE			-60.00	
		09/01	/13	P	Р	СНК	CHECK PAY	MENT				-10.00	
	Svc Date	R	Procedure				All Char			DY Outs	4	Item Bal	
	07/22/14		99204	_		Description TIENT NEW 4	15 MINUTES	Loc 1	Doc 1	DX Code 0010	Amount 125.00		Alct Amt
	05/22/14		99213			TIENT VISIT		1	1	0010	50.00		
	05/22/14		99213 99213			TIENT VISIT		1	1 12	0060	50.00 50.00		
	05/08/14		99212			TIENT VISIT		1	12	0010	25.00		
	05/08/14	н	99213	OFFICE O	UTPA	TIENT VISIT	15 MINUTES	1	12	0010	50.00	50.00	

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

us Block	Detail Ti	rans		CI	ear Screer	1	Ne:	kt Block						
														7
		Group Jnalloc	12 cated Am	nt	-1538.00	tch	1292	Accoun Balance	_		MARLEY	, BOB		
							Unalloc	ated Paymen	ts/Ad	justments	;			
		Svc	Date	St	Ins	_	Procedure		De	escription			Amount	
	l	05/08		H		P	COPAY	PATIENT COP					10.00	Unalloc. Amt.
		05/01		H	P CHK CHECK PAYMENT -10.00 00450 P CARE MEDICARE PAYMENT-MEDICARE -80.00						*			
		10/15		P	00450 P CARE MEDICARE PATMENT-MEDICARE -00.00 00450 A 671 MEDICARE ADJMEDICARE -60.00									
		09/01	1/13	P		Ρ	СНК	CHECK PAYN	IENT				-10.00	
All Charge Items														
	Svc Date	R	Proced	dure		D	escription		Loc	Doc	DX Code	Amount	Item Bal	Alct Amt
	07/22/14	Н	9920				IENT NEW 45		1	1	0010	125.00	125.00	
	05/22/14	H	9921 9921				ENT VISIT 15		1	1	0010	50.00	50.00	
	05/22/14 05/08/14	H	9921				IENT VISIT 15 IENT VISIT 15		1	1	0060	50.00 50.00	14.00	
	05/08/14	н	9921				ENT VISIT 10		1	12	0010	25.00	25.00	
			1				ENT VISIT 15		1	12	0010	50.00	50.00	

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 'Alet Amt' field.



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

Block	Detail T	rans		Cle	ar Screen	1	Nex	kt Block						
														7
		Group			Ba -1538.00	tch [1292	Account			MARLEY	, BOB		
		Inalio	cated Amt		-1556.00		Unalloc	Balance ated Payments			;			
	[Svc	Date	St	Ins	Ту	Procedure			scription		,	Amount	
		05/08		Н		Ρ	COPAY	PATIENT COPA					10.00	Unalloc. Amt.
		05/0		H P	P CHK CHECK PAYMENT -10.00 ' 00450 P CARE MEDICARE PAYMENT-MEDICARE -80.00 -80.00				* 0.00					
		10/1		P	00450									
		09/0	1/13	Р		Р	СНК	CHECK PAYME	NT				-10.00	
					All Charge Items									
	Svc Date	R	Procedu	-			escription		Loc	Doc	DX Code	Amount	Item Bal	Alct Amt
	07/22/14 05/22/14	H	9920- 9921:				IENT NEW 45 IENT VISIT 15		1	1	0010	125.00 50.00	115.00 50.00	-10.00
	05/22/14		9921				IENT VISIT 13		1	1	0060	50.00	14.00	
	05/08/14	н	9921	3	OFFICE OU	IPAT	IENT VISIT 15	5 MINUTES	1	12	0010	50.00	50.00	
	05/08/14	н	99213				IENT VISIT 10		1	12	0010	25.00	25.00	
	05/08/14	H	99213	3	OFFICE OUT	IPAT	IENT VISIT 15	5 MINUTES	1	12	0010	50.00	50.00	

• Save



How to unallocate and reallocate a payment

• MM9.3

🙀 Medclaim - User:		×
Master Menu		3 🗊 🥌 ጅ 🔛
Master Menu		OFFC Physician Office Test Database
Master Tables and File Searches 1 Clinic Master Files 2 Control Table Maintenance 3 Edit Tables Menu 4 Account Collections 5 File Searches 6 On Demand Bills/Claims/Report	Patient Activity Patient Account Guarantor Setup & Maintenance Transaction Entry Billing Office Interface	Appointment Scheduling Image: Appointment Scheduling
Record: 1/1	<0SC>	



🙀 Medcmenu - User:		×
Master Menu > 9 - Transaction Entry Menu		8 💽 < 🖉
Transaction Entry Menu		OFFC Physician Office Test Database
Batch	Charge Related	Miscellaneous
Batch List	4 Remittance Processing	7 Insurance Claims Query/Maintenance
2 Batch Control: Charge Entry/Update	5 Suspended Transaction Maintenance	Precertification Maintenance
3 Batch Control: Patient Reception and Open	6 UB04 Transaction Entry	
Item Payment/Adjustment Entry		
	Enter Selection	
Record: 1/1	<0SC>	

- Query or create a new batchSelect the {Crt G-Open Item Post} tab at the top of the screen



• Select #3

🙀 Medhmenu - User:		×
Master Menu > 9 - Transaction Entry Menu > 3 - Batch Control > Ctr g - Open	Item Posting Menu	
Open Item Posting Menu		OFFC Physician Office Test Database
1	Pmts/Adjs By Charge Reallocate Previous Postings Pmt/Adj Allocation	
Record: 1/1	<09C>	



• Enter in the account number <Tab or Enter>

Group 12 Account 01026 MARLEY, BOB Balance 754.81 Unallocated Amt -1533.00 All Charge Items with Payments/Adjustments
Unallocated Amt
All Charge Items with Payments/Adjustments Svc Date T Proc Description Loc Doc DX Code Amount IT Item Bal 01/01/02 C 99213 OFC OR OTH OUTPAT - 15 MIN 1 2727 0010 61.00 Si 0.00 0 01/01/02 C 99373 COMPLEX TELEPHONE CONSULTATI 1 2727 0064 55.00 MC 0.00 0 02/01/02 C 99213 OFC OR OTH EQP - 25 MIN 1 1 0010 94.00 MC 0.00 0 02/01/02 C 99213 OFC OR OTH OUTPAT - 15 MIN 1 1 0010 61.00 MC -211.00 V
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 0.00 01/01/02 C 99373 COMPLEX TELEPHONE CONSULTATI 1 2727 0064 55.00 MC 0.00
01/01/02 C 99373 COMPLEX TELEPHONE CONSULTATI 1 2727 0064 55 00 MC 0.00 2 02/01/02 C 99214 OFC OR OTHER OP - 25 MIN 1 1 1 0010 94.00 MC 0.00 2 02/01/02 C 99213 OFC OR OTH OUTPAT - 15 MIN 1 1 0010 61.00 MC -211.00 -211.00 -211.00 -
02/01/02 C 99214 OFC OR OTHER OP - 25 MIN 1 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 -211.00 - Payments/Adjustments Unallocate/Reduce Allocation
Description OFC OR OTH OUTPAT - 15 MIN 1 1 0010 61.00 MC -211.00 Image: Comparison of the comparison of t
Payments/Adjustments Unallocate/Reduce Allocation
Svc Date St Ins Ty Proc Description Amount Item Bal

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.

Medoiunal - User:		y Menu > 3					em Posting Menu > 3				8	1		1			×
Detail Inquiry / F							-							OFFC Phys	sician (Office Test	Database
Previous Block		Clear	Scre	en		Nex	t Block	Detail T	rans		Un	alloc Pay/Ac	dj				
		up 12 llocated An	nt [Acco -1538.00	_	01026 A	MARLEY, B		Adjust	ments	Bala	nce 754.8	1				
		Svc Date	т	Proc		Des	scription		Loc	Doc	DX Code	Amount	Π	Item Bal			
	- 44	01/01/00	С	99213			UTPAT - 15 MIN		1	2727	0010	61.00		0.00 🚊			
		01/01/02	C	99373			EPHONE CONSULTA	λTI	1	2727 1	0064 0010	55.00		0.00			
		02/01/02 02/01/02	C C	99214 99213			OP - 25 MIN UTPAT - 15 MIN			1	0010	94.00 61.00		-211.00			
			1-1				Payments/Adjustments Unallocate/Reduce Allocation										
		Svc Date	St	Ins	Ту	Proc		Description				Amou	int	Item Bal			
	_		_	_	_	_	_	_	_	_	_	_	_	_		_	
Record: 1/?							<osc></osc>										



• 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.

Medoiunal - User.	0	80	<u> </u>							_	8	0		1	×
Master Menu > 9 - Transact				itch Contro	ol > Cti	rg-Openit	em Posting Menu > 3 - Deta	ail Inquiry /	Reallo	cate				OFFC Physi	cian Office Test Database
Previous Block		Clear	Scr	en		Nex	t Błock Detail Trans Unalloc Pay/Adj								
	_														
		roup 12 nallocated Ar	mt [-1538.00	_	01026	MARLEY, BOB	avments//	diust	ments	Bala	nce 754.8	1		
		Svc Date	т	Proc	T		scription		Loc		DX Code	Amount	п	Item Bal]
	*	01/01/00	c	99213	OFC		UTPAT - 15 MIN		1	2727	0010	61.00		0.00 🛋	
		01/01/02	c	99373			PHONE CONSULTATI		1	2727	0064	55.00		0.00	
		02/01/02	c	99214			OP - 25 MIN		1	1	0010	94.00	MC	0.00	
		02/01/02	c	99213			UTPAT - 15 MIN		1	1	0010	61.00	мс	-211.00	
						I	Payments/Adjustments Unallocate/Reduce Allocation								J
		Svc Date	St	Ins	Ту	Proc	Desc	cription				Amou	nt	Item Bal	
		01/01/00	н		Ρ	CASH	CASH PAYMENT					-61.0	0	0.00	
		_		_		_	_	_		-	_	_		_	
Record: 1/1							<osc></osc>								



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

🙀 Medoiunal - User: .				×
Master Menu > 9 - Transaction Entry Menu > 3 - 1	Batch Control > Ctr g - Open It	tem Posting Menu > 3 - Detail Inquiry / Rea	locate	
Detail Inquiry / Reallocate)			OFFC Physician Office Test Database
Previous Block Clear Sc	reen Nex	kt Block Detail Trans	Unalloc Pay/Adj	
Group 12 Unallocated Amt	Account 01026 -1538.00 Forn	MARLEY, BOB	690000 X	
Svc Date T 01/01/00 C 01/01/02 C 02/01/02 C 02/01/02 C	99213 OFC OR C 99373 COMPLE 99214 OFC OR C 99213 OFC OR C	Payment/Adjustment	0 61.00 SI 64 55.00 MC 10 94.00 MC 10 61.00 MC	Item Bal 0.00 0.00 0.00 0.00 -211.00
Svc Date 5		Description		tem Bal
01/01/00	H P CASH	CASH PAYMENT	-61.00	0.00
Payment/Adjustment Unallocated Record: 0/1		<osc></osc>		



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

Previous Block	Detail T	rans	c	lear Screer	n	Ne:	xt Block								
													7		
		Group Jnalloc	12 cated Amt	Ba -1599.00	itch [a	888888	Account Balance	•••		MARLEY,	BOB				
						Unalloc	ated Payment	s/Adj	justment	s			-		
	-			St Ins	Ту				escription			Amount			
		01/01			P	COPAY COPAY	PATIENT COP/ PATIENT COP/		ISCOVER (CARD		-10.00	Unalloc. Amt.		
		01/0			P	COPAY	PATIENT COP					-10.00			
	_	01/0	1/00 F	4	Р	CASH	CASH PAYME	T				-61.00			
		01/0	1/00 F	P 00450	Р	CARE	MEDICARE PA	YMEN	IT-MEDICA	RE		-61.00			
		1-					All Charge			1	1		1	1	
	Svc Date 07/22/14	R	Procedure 99204	OFFICE OU		escription IENT NEW 45		<u>Loc</u>	Doc 1	DX Code 0010	Amount 125.0	Item Bal 0 125.00	Alct Amt	-	
	05/22/14	н	99213			IENT VISIT 1		1	1	0010	50.0				
	05/22/14	1	99213	OFFICE OUT	TPAT	IENT VISIT 1	5 MINUTES	1	1	0060	50.0	0 14.00			
	05/08/14	Н	99213			IENT VISIT 1		1	12	0010	50.0				
	05/08/14	H	99212 99213			IENT VISIT 1		1	12 12	0010	25.0 50.0				
	00100111		00210	011102 00		LITT FIGHT I	0 11110 120	1		0010	00.0	00.00			

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

Block	Detail T	rans	1	CI	ear Screen	1	Ne:	t Block						OFFC Physician Office T
			_											1
		Group Inallo	12 cated Am		-1599.00	tch	888888	Account Balance			MARLEY	, BOB		
							Unalloc	ated Payment	ts/Adj	ustments	\$			_
	-	Svc	Date	St	t Ins	Ту	Procedure		De	escription			Amount	
		01/0		P		Р	COPAY	PATIENT COP		SCOVER C	ARD		10.00	Unalloc. Amt.
		01/01/00 P 01/01/00 P				P	COPAY	COPAY PATIENT COPAY -10.00 COPAY PATIENT COPAY -10.00					-10.00	*
		01/0		H		P CASH CASH PAYMENT -61.00								
		01/0	1/00	P	00450	Ρ	CARE	MEDICARE PA	YMEN	T-MEDICA	RE		-61.00	
								All Charge	e Iten	ıs				
	Svc Date	R	Proced				escription		Loc	Doc	DX Code	Amount	Item Bal	Alct Amt
	07/22/14	H	9920 9921				TENT NEW 45 TENT VISIT 15		1	1	0010	125.00 50.00	125.00	└─── ⊢
	05/22/14		9921				TENT VISIT 15		1	1	0010	50.00		
	05/08/14	H	9921				TENT VISIT 15		1	12	0010	50.00		
	05/08/14	н	9921	2	OFFICE OUT	TPAT	TENT VISIT 10	MINUTES	1	12	0010	25.00	25.00	
	00/00/14							MINUTES	1	12	0010	50.00	50.00	

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.

Block	Detail Ti	rans	c	lear Screer	1	Nex	tt Block						
	G	Group	12	Ва	tch [388888	Account	01026		MARLEY,	, BOB]
	U	Inallocat	ted Amt	-1599.00			Balance 7				-		
					1	Unalloca	ated Payments	/Adjus	tments	6			
	-	Svc Da			Ту	Procedure		Desc				Amount	
		01/01/0			P	COPAY COPAY	PATIENT COPA PATIENT COPA		OVER C	ARD		-10.00	Unalloc. Amt.
		01/01/0			P	COPAY	PATIENT COPA					-10.00	* 0.00
		01/01/0			P	CASH	CASH PAYMEN					-61.00	
		01/01/0	10 F	00450	Р	CARE	MEDICARE PAY	MENT-N	IEDICA	RE		-61.00	
	_						All Charge	Items					
	Svc Date	RI	Procedure		D	escription			oc	DX Code	Amount	Item Bal	Alct Amt
	07/22/14	н	99204	OFFICE OU		IENT NEW 45		1	1	0010	125.00	64.00	
	05/22/14	н	99213			IENT VISIT 15		1	1	0010	50.00	50.00	
	05/22/14	1	99213			IENT VISIT 15		1	1	0060	50.00	14.00	
	05/08/14	н	99213			IENT VISIT 15 IENT VISIT 10		1	12 12	0010	50.00	50.00	
	05/08/14	H	99212								25.00	25.00	

• Save



Group Statistics

• MM1.8

Meddaim - User:		X
Clinic Master Files Control Table Maintenance Edit Tables Menu Account Collections File Searches On Demand Bills/Claims/Report	 Patient Activity Patient Account Guarantor Setup & Maintenance Transaction Entry Billing Office Interface 	Appointment Scheduling Appointment Scheduling
Record: 1/1	Enter Selection	[



Master Menu > 1 - Master Information Maintenance Master Information Maintenance System Profile Maintenance	Section Maint	Image:
 2 Doctor Maintenance 3 Location Code Maintenance 4 Insurance Company Maintenance 5 Diagnosis Codes Maintenance 6 Procedure Codes Maintenance 7 Billing Messages Maintenance 8 Management Group Maintenance 9 Audit Trail Screen 10 Multiple Price Maintenance 	12 PPO/HMO Maintenance 13 Managed Care Payment Schedule 14 Referring Doc Crosswalk 15 Procedure Conversion Screen 16 Bank Setup 17 Refund Check Maintenance 18 Test Codes Maintenance 19 Insurance Name Conversion 20 Smbal/Bdebt/Coll Parameters	 22 Ind. Provider # Maint 23 Action Codes 24 Managed Care Contract 25 Location Code Crosswalk 26 Attending Doc Crosswalk 27 LLP Master 29 Clinix Security Maintenance
	Enter Selection	

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



Master Menu > 1 - Master Information Maintenance > 8 - Management Group Pro	file Maintenance	×
Management Group Profile Maintenance Provider #'s Group Statistics Atternate Stateme	ent Address Alternate Claim Billing Address	OFFC Physician Office Test Database Alternate Claim Pay to Address
Group Code 2 Master Gro JK Short Name PHY OFFICE Group Name PHYSICIAN OFFICE & TEST GROUP Group Name2 Address One 123 BEST IN TOWN DRIVE Address Two ADDR2 City GARLAND St TX Zin Code 75040 8988 Country USA Biling Office 555 555 5511 Ext 5678 Contact 555 555 5512 Ext 151 Fax 555 555 5512 Ext 151 Fax 555 555 5513 Ext Contact Email physicianoffice@aol.com Office Code CMIS Clinix Medical Info Services	Auto Doctor Assign Y Auto Acct Assign Y Auto DrCode Assign Y Auto Acct 1910 Auto Doctor Explode Chgs? Y Auto Guar Assign Y Add end date Y Auto Guar Assign Y Add end date Y Auto Guarantor 1908 Allow Att. as Ref Y Speciality ED Past Due Age 60 Type CP NPI 1902895170 Y Fiscal Year End Month 6 Use Group NPI? Y Currmonth 10 Tax Id 0987654321 Curryear 2014 Taxonomy Minimum Bill Amount	Defaults Location Code Exception Code Price Code PP Self Pay Type SP Account Stat A Update Exc Code Update Exc Code Print PIN #? Min ePay Amt Min ePay % 30.00 Stmt PIN Valid (Days) 27 Clent URL www.testingclienturlforcustomers12.org UB04 Information Facility Type Facility Type Bill Class 1
Max Patient Bilings 3 Misc Doctor Collection Letter 60 Auto Suspense Charges Patient Schedule Days 740 Acct Type Patient Schedule Purge Pat Scheduled Thru 10/21/16	Client Revenue % DME Supplier # Percent 8.5 Scan Bar Code	Provider Numbers Medicare Medicaid Blue Cross Last Update 09/24/14 by



roup Status				(OFFC Physician Office Test Data
For Monthly History					
			oup Code 12		
	Number of Cyc Last Cycle Nur		rrent Cycle 4	Last Daily	
	Last Cycle Nur	nber 3 Las	st Cycle 10/10/14	Last EOM 09/30/14	
			Balances		
	Current -47,295.	70 Last EC	0M -47,295.70 Curren	nt 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	



• 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.

oup History									OFFC	Physician Office Test D
ſ	0									
	Group 12	PHYSI	CIAN OFFICE & T	EST					_	
	Date	Charges	Payments	Adjustments	EOM A/R	CHG	Number of PAY	ADJ	-	
	9 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 2 2014	1952.64 135.00	-2992.36	-2716.64	-49000.70 -45244.34	38 3	67 0	45 - 0		
	1 2014	6670.00	-311.60	0.00	-45244.34	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 🕞		
	L			1					-)	
(

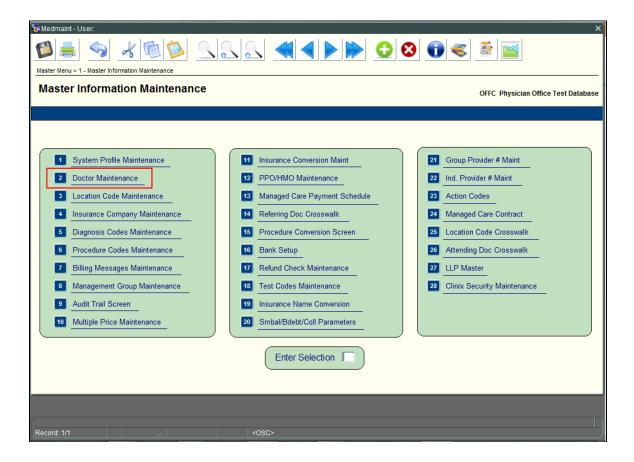


Doctor Statistics

• MM1.2

Meddaim - User. Master Menu Master Menu		X CFFC Physician Office Test Database
Clinic Master Files Control Table Maintenance Edit Tables Menu Account Collections File Searches On Demand Bills/Claims/Report	Patient Activity 7 Patient Account 8 Guarantor Setup & Maintenance 9 Transaction Entry 10 Billing Office Interface	Appointment Scheduling Appointment Scheduling
Record: 1/1	Enter Selection	



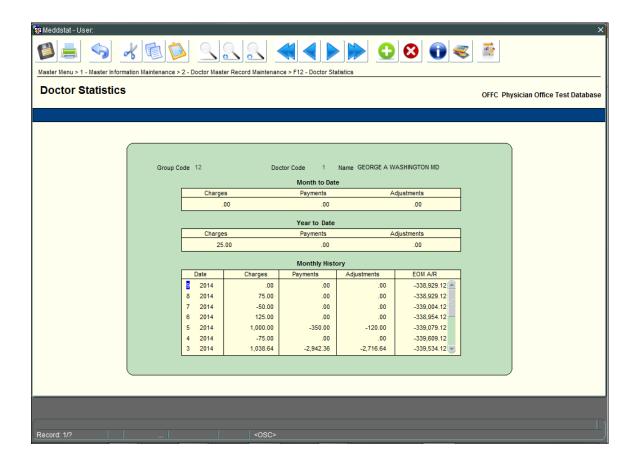


- Query your doctor
- Select the 'Doctor Status Info' tab at the top of the screen or hit F12 on the keyboard



tor Master	Record Maintenance			OFFC Ph	nysician Office Test [
Credentialed	Participating	Doctor Ins Crosswalk	Provider's #	Doctor Statistics Info	Attend Doc Xwa
fer Doc Xwalk	Certification Codes				
	Group Code 12) 333 - 0221	
	Doctor Code 1		Fax (<u>)</u>	
	Doc Last Name WASHINGTON	M.I. A		223333	
	First Name GEORGE Doctor Name GEORGE A WAS	Title MD		223333	
	Address 1 123 MOUNT VER		000	0193990	
	Address 2	NON DIAVE	Alt Grp NPI	010000	
	City MILTON	St NY			
	Zip Code 12547 -		Department		
	Specialty		Last Schedule 10/0	06/17	
	Fee Schedule 1	Referring Phys	WCB Rating Code		
	Participating Y	Intern N	WCB Auth Num		
	Payee Public Aid Elec.	Attending Phys Y Referring Out Y		01/01/01 Through 01/01/11	
	Public Aid Elec. Y Person Y	Referring Out Y Medicare Elec. Y	Taxonomy 207V00	05/01/09	
	Check Eligibility?	Blue Shield Elec.	Obstetrics & Gynecolog		
			Link Code ABC	83 -	
	Last Update 01/21/1	5 By AKEL	Link Godo Moo	Locum Tenens	







Location Statistics

• MM1.3

Medclaim - User:		X
Clinic Master Files Control Table Maintenance Edit Tables Menu Account Collections File Searches On Demand Bills/Claims/Report	 Patient Activity Patient Account Guarantor Setup & Maintenance Transaction Entry Billing Office Interface 	Appointment Scheduling Appointment Scheduling
Record: 1/1	Enter Selection	[



Master Menu > 1 - Master Information Maintenance		×
Master Information Maintenance		OFFC Physician Office Test Database
 System Profile Maintenance Doctor Maintenance Location Code Maintenance Location Code Maintenance Insurance Company Maintenance Diagnosis Codes Maintenance Procedure Codes Maintenance Procedure Codes Maintenance Billing Messages Maintenance Management Group Maintenance Audit Trail Screen Multiple Price Maintenance 	11 Insurance Conversion Maint 12 PPO/HMO Maintenance 13 Managed Care Payment Schedule 14 Referring Doc Crosswalk 15 Procedure Conversion Screen 16 Bank Setup 17 Refund Check Maintenance 18 Test Codes Maintenance 19 Insurance Name Conversion 20 Smbal/Bdebt/Coll Parameters	 Group Provider # Maint Ind. Provider # Maint Action Codes Managed Care Contract Location Code Crosswalk Attending Doc Crosswalk LLP Master Clinix Security Maintenance
	Enter Selection	

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



Wedloc - User:	×
Master Menu > 1 - Master Information Maintenance > 3 - Location Codes Maintenance	
Location Codes Maintenance	OFFC Physician Office Test Database
Location Statistics	
Group Code 1 Location Code 1 Location Name MAN LOCATION Address 1 278 FRANKLIN RD Address 2 SUITE 300 City BRENTWOOD St TN Country USA 21p Code 37027 - 2221 RVU Locality Y BF8A (Health Professional Shortage Areas) Telephone 615 Cla # / HHA # Ink Code POS Sched Loc Name MAN LOCATION CLINK FDA # FDA # Facility Outside Lab MD Locator Code NPI 1194735449 Effective Date Updated on 06/06/14 Expiration Date Updated on 06/06/14	
Record: 1/?	



								OFFC Phys	sician Office Test [
_								_	
Gro	oup Code 12	Location	Code	1 Nar	ne MAIN LO	CATION			
			Summa	ary Totals					
		Charge		Payn	nents	Adj	ustments		
	Current Year to		.00 25.00		.00. .00		.00 .00		
			Month	nly Histor	v				
	Date	Charges	Payme		, Adjustme	ents	EOM A/R		
	9 2014	.00		.00		.00	-119,100.42 📤		
	8 2014 7 2014	175.00 -50.00		.00 .00		.00 .00	-119,100.42 -119,275.42		
	6 2014	-50.00 831.00		-167.00		.00	-119,275.42		
	5 2014	1,219.00		-450.00		-60.00	-119,889.42		
	4 2014	-75.00		2.00		.00	-120,598.42 💌		



Client Statistics

• MM1.1

Meddaim - User:		Image: Image of the second
Master Tables and File Searches Clinic Master Files Control Table Maintenance Edit Tables Menu Account Collections File Searches On Demand Bills/Claims/Report	 Patient Activity Patient Account Guarantor Setup & Maintenance Transaction Entry Billing Office Interface 	Appointment Scheduling Appointment Scheduling
Record: 1/1	Enter Selection	



🙀 Medmaint - User:		×
		8 🗊 🥪 🖻 📓
Master Menu > 1 - Master Information Maintenance		
Master Information Maintenance		OFFC Physician Office Test Database
System Profile Maintenance	Insurance Conversion Maint	21 Group Provider # Maint
2 Doctor Maintenance	12 PPO/HMO Maintenance	22 Ind. Provider # Maint
3 Location Code Maintenance	13 Managed Care Payment Schedule	23 Action Codes
Insurance Company Maintenance	14 Referring Doc Crosswalk	24 Managed Care Contract
5 Diagnosis Codes Maintenance	15 Procedure Conversion Screen	25 Location Code Crosswalk
6 Procedure Codes Maintenance	16 Bank Setup	26 Attending Doc Crosswalk
7 Billing Messages Maintenance	17 Refund Check Maintenance	27 LLP Master
8 Management Group Maintenance	18 Test Codes Maintenance	28 Clinix Security Maintenance
9 Audit Trail Screen	19 Insurance Name Conversion	
10 Multiple Price Maintenance	20 Smbal/Bdebt/Coll Parameters	
	Enter Selection	
Record: 1/1	<osc></osc>	

- ٠
- Query your client code Select the 'Client Statistics' tab or hit F12 on the keyboard •



Medcprof - User:	
Client Profile Maintenance	OFFC Physician Office Test Database
Client Statistics	
Client Code DFFC Client Name PHYSICIAN OFFICE TEST DATABASE Address 1 This Screen Programming Use Address 2 City City Nashvile St Zip Code 37221 Billing Office 688 111 0649 Ext 1259 Contact 595 254 6694 Ext 1264 Fax 555 5555 Ext 156	Management GroupYCurryear2015Currmonth9Automatic Ins AssignYAuto Ins Code66Patient Scheduled Thru03/25/16Defaut Group Code12Last Updated08/17/15Updated byAKEL



• 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.					< ≧ ≦
Client Status					OFFC Physician Office Test Database
Monthly History					
	Number of Cycles Last Cycle Number		rrent Cycle 3 st Cycle 10/10/14	Last Daily Last Eom 09/30/14	
		rrent	Last EOM	Current Year	
	2,08	5,279.56	2,084,281.00	2,162,560.57	
			Month to Date		
		Charges	Payments	Adjustments	
	Amount	3,756.		· · · · · · · · · · · · · · · · · · ·	
	Transactions	12	29	7	
			Year to Date		_
		Charges	Payments	Adjustments	-
	Amount Transactions	2,841,264 73,69		9 -2,108,795.19 24,255	
		10,00		27,200	
Record: 1/1		<0.90>			



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

• MM9.7

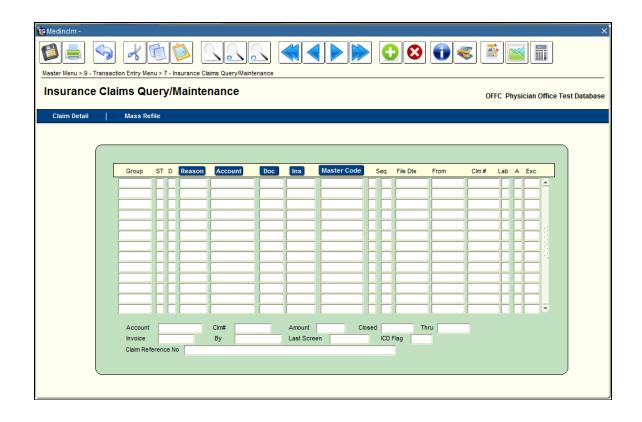
Meddaim - User: AKEL - 10/14/14		X
Master Tables and File Searches 1 Clinic Master Files 2 Control Table Maintenance 3 Edit Tables Menu 4 Account Collections 5 File Searches 6 On Demand Bills/Claims/Report	Patient Activity Patient Account Guarantor Setup & Maintenance Transaction Entry Billing Office Interface	Appointment Scheduling Appointment Scheduling



🙀 Medcmenu - User:		×
		8 🗊 🥪 📓
Master Menu > 9 - Transaction Entry Menu		
Transaction Entry Menu		OFFC Physician Office Test Database
Batch I Batch List 2 Batch Control: Charge Entry/Update 3 Batch Control: Patient Reception and Open Item Payment/Adjustment Entry	Charge Related Remittance Processing Suspended Transaction Maintenance UB04 Transaction Entry	Miscellaneous Insurance Claims Query/Maintenance Precertification Maintenance
	Enter Selection	
Record: 1/1	<0SC>	



• You are able to query on one or any combination of the columns listed on this screen





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

ance C	laims Qu	er	y/N	lainte	nance							0	FFC P	hysi	ician O	Office Te
Detail	Mass Re	file												,		
_																
	Group	ST	D	Reason	Account	Doc	Ins	Master Code	Seq	File Dte	From	Clm #	Lab	Α	Exc	
	<mark>12</mark>	0			011621	1	00147	UNHLTH		08/21/15	02/02/15	16789	N	Y		A
	12	0	N		011621	1	00147	UNHLTH		07/24/15	06/06/11	16767		Y	PD	
	12	0	N		011621	3	00147	UNHLTH		07/24/15	02/15/11	16766	N	Y	PD	
	12	0	N		011621	3	00147	UNHLTH		07/24/15	02/15/11	16765		Y	PD	
	12	0	N		011621	2	00147	UNHLTH		06/12/15	06/01/10	16729	N	M	PD	
	12	0	N		011621	1	00147	UNHLTH		06/12/15	01/30/15	16728			PD	
	12	С	R		011621	1	00147	UNHLTH	<u> </u>	03/06/15	01/30/15	16689			PD	-
	12	С	R		011621	2	00147	UNHLTH		02/27/15	06/01/10	16657	N	M	PD	
	12	C	R		011621	1	00147	UNHLTH		02/27/15	06/06/11	16656			PD	
	12	С	R		011621	3	00147	UNHLTH		02/27/15	02/15/11	16655		M	PD	
	12	С	R		011621	3	00147	UNHLTH		02/27/15	02/15/11	16654		M	PD	
	12	С	R		011621	1	00147	UNHLTH		02/25/15	01/30/15	16616		M	PD	
	12	C	R		011621	1	00147	UNHLTH		01/30/15	01/30/15	16597		Y	PD	
	Account	0	1162	1	Clm# 16789		Amount	100.00 Clos	sed	T	Iru 02/02/15	_				
	Invoice		1102	<u> </u>	By		Last Scre		ICD		02/02/15					
	IIIVUICE				by		Last Sch	5011								



- 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

ance C	aims Qu	er	y/N	lainte	nance							O	FFC P	hysi	cian C	Office T
Detail	Mass Re	file														
	Group	ST	D	Reason	Account	Doc	Ins	Master Code	Seq	File Dte	From	Clm #	Lab	A	Exc	
	12	0	N		1040	1	01026	СОММ	1	08/26/15	06/25/15	16799	N	Y	СР	
	12	С	R		836	2	01026	СОММ	1	08/29/14	04/04/04	16523	N	Y	CP	
	12	0	N		730	4	01026	СОММ	2	03/15/13	03/03/03	16395	N	Y	СР	
	12	С	Y		730	4	01026	СОММ	2	03/15/13	03/03/03	16394	N	Y	CP	
	12	0	Ν		902	12	01026	Сомм	2	03/15/13	03/25/03	16393	N	Y	CP	
	12	С	Y		902	12	01026	СОММ	2	03/15/13	03/25/03	16392	N	Y	СР	
	12	0	Ν		883	13	01026	СОММ	2	03/15/13	03/26/03	16391	N	Y		-
	12	0	Ν		883	7	01026	СОММ	2	03/15/13	07/31/03	16390	N	Y		
	12	С	Y		883	7	01026	СОММ	2	03/15/13	07/31/03	16389	N	Y		
	12	0	Ν		731	6	01026	Сомм	2	03/15/13	03/04/03	16388		Y	СР	
	12	0	Ν		827	12	01026	СОММ	2	03/15/13	03/25/03	16387		Y	PD	
	12	С	Y		827	12	01026	СОММ	2	03/15/13	03/25/03	16386	<u>N</u>	Y	PD	
	12	0	Ν		728	2	01026	Сомм	2	03/15/13	03/03/03	16385		Y	СР	•
	Account				Clm# 16799		Amount		-			_				
		10	040		10100			250.00 Clos			06/25/15					
	Invoice		ce No		Ву		Last Scr	sen	ICD	Flag 10						



- 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

Detail														-		Office Tes
	Mass Re	file														
														_		
	Group	ST	D Reason	Account	Doc	Ins	Master Code	5	Seq	File Dte	From	Clm #	Lab	А	Exc	
	12	0	N	010101	1	UNHLT	COMM		1	01/24/14	09/01/13	16467	N	Y		
	12	0	N	12345	4	01233	CIGNA		1	01/24/14	06/12/13	16463	N	Y	PD	j
	12	0	N	1149	1	00455	MCARE	\square	1	01/24/14	09/09/13	16462	N	Y		
	12	0	N	28	1	00043	CIGNA		1	01/24/14	09/13/13	16461	N	Y	PD	
	12	0	N	28] [1	00043	CIGNA		1	01/24/14	09/09/13	16460	N	Y	PD	
	12	0	N	28] [1	00043	CIGNA		1	01/24/14	10/02/13	16459	N	Y	PD	j
	12	0	N	1001] [1	TX1	MGCINS		1	01/24/14	10/01/13	16458	N			j—
	12	0	N	1434] [1	SARAH	СОММ		1	01/24/14	09/09/13	16457	N	Y		j
	12) C	N	8001] [1	BTX	BCBS		1	01/24/14	11/13/13	16456	N	Y		j
	12	С	Y	01026] [1	00450	MCARE		1	01/24/14	06/12/13	16455	N		MR	j
	12	C	N	01026] [1	00450	MCARE		1	01/24/14	10/15/13	16454	N	Y	MR	J
	12	C	Y	01026] [1	00450	MCARE		1	01/24/14	09/01/13	16453	N	Y	MR	
	12	ο	N	1001	1	TX1	MGCINS		1	01/10/14	09/01/13	16452	N			



- 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

ce Clai	ms Qu	ery	y/IV	ainte	nance								OF	FC P	hysi	ician Office T
ail	Mass Re	file														
_																
	Group	ST	D	Reason	Account	Doc	Ins	Master Code	:	ieq	File Dte	From	Clm #	Lab	А	Exc
	4	0	N		401192	4	00450	MCARE	E	1	04/09/97	04/03/97	4819	N	N	
	4	0	N		400138	4	00450	MCARE	E	1	11/06/96	10/18/96	4533	N	N	
	4	0	N		400138	4	00450	MCARE	E	1	10/09/96	10/04/96	4475	N	N	
	4	0	N		400138	4	00450	MCARE	E	1	09/25/96	09/20/96	4460	N	N	
	4	0	N		400138	4	00450	MCARE	E	1	09/11/96	09/06/96	4429	N	N	
	4	0	Ν		400175	4	00450	MCARE	E	1	09/05/96	08/26/96	4409	N	N	
	4	0	N		400138	4	00450	MCARE	E	1	08/28/96	08/23/96	4391	N	N	
	4	0	Ν		400175	4	00450	MCARE	E	1	08/14/96	08/12/96	4360	N	N	
	4	0	Ν		400175	4	00450	MCARE	E	1	08/07/96	07/29/96	4335	N	N	
	4	0	Ν		400138	4	00450	MCARE	E	1	08/07/96	07/26/96	4333	N		
	4	0	Ν		400175	4	00450	MCARE	E	1	07/17/96	07/15/96	4291	N	N	
	4	0	Ν		400138	4	00450	MCARE	E	1	07/17/96	07/12/96	4289	N	N	
	4	0	Ν		400138	4	00450	MCARE	E	1	07/03/96	11/17/95	4263	N		
		_							<u> </u>							
	Account	40	1192	2	Clm# 4819		Amount	85.00 C	losed		11	ru 04/03/97				

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.

Mediogry - User. Master Menu > 5 - Queries Menu > 1 - Loca Location Code Inquiry				0	OFFC Physician Office Test Database
	Group	Location	Location Name	Telephone	-
	12	1	MAIN LOCATION		
	12	2	PADUCAH GET WELL QUICK CLN'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		-
L					



- 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 107 001 CHOLERA* 10/01/95 06/15/11 0010 CHOLERA 10/01/95 06/15/11 0010 Cholera dt vib cholerae 10/01/95 06/15/11 0011 Cholera dt vib cholerae 10/01/95 0 0019 Cholera dt vib etor 10/01/95 0 0020 Typhoid fever 10/01/95 0 0021 Paratyphoid fever b 10/01/95 0 0022 Paratyphoid fever c 10/01/95 0 0023 Paratyphoid fever b 10/01/95 0 0030 Salmonelia septicemia 10/01/95 0 0031 Salmonelia etheritis 10/01/95 0 00322 Salmonelia meningitis 10/01/95 0 00323 Salmonelia etheritis 10/01/95 0 00324 Salmonelia otherwyelitis 10/01/95 0 00329 Local salmonelia in fNEC 10/01/95 0			📡 🧟 🗊 🥪 🚰
Code Diagnosis Description Effective Expire ICD 10? 001 CHOLERA* 1001/97 12/31/88 • 0010 CHOLERA D/T VIB CHOLERAE 10001/97 12/31/88 • 0010 Cholera d/t vib cHorerae 10001/95 • • 0011 Cholera d/t vib cHorerae 10001/95 • • 0010 Cholera d/t vib cHor 10001/95 • • 0011 Cholera d/t vib cHor 10001/95 • • 0020 Typhoid fever 10001/95 • • • 0021 Paratyphoid fever a 10001/95 • • • • 0022 Paratyphoid fever b 10001/95 •	> 1 - Master Information Mai	tenance > 5 - Diagnosis Code Maintenance	
Code Diagnosis Description Effective Expire ICD 10? 001 CHOLERA* 10/01/97 12/31/88 • 0010 CHOLERA* 10/01/97 12/31/88 • 0010 CHOLERA 10/01/97 12/31/88 • 0010 CHOLERA 10/01/97 12/31/88 • 0010 Cholera d/ vib cholerae 10/01/11 • • 0011 Cholera d/ vib el tor 10/01/95 • • 0020 Typhoid fever 10/01/95 • • • 0021 Paratyphoid fever a 10/01/95 • • • • 0022 Paratyphoid fever c 10/01/95 • • • • • • 0023 Paratyphoid fever c 10/01/95 •	osis Code Main	tenance	OFFC Physician Office Test
01 CHOLERA* 100/1/97 12/31/98 0010 CHOLERA D/T V/B CHOLERAE 10/01/95 06/15/11 0010 CHOLERA D/T V/B CHOLERAE 10/01/95 06/15/11 0010 Cholera d/t v/b cholerae 10/01/11 10/01/95 0011 Cholera d/t v/b cholerae 10/01/11 10/01/95 0019 Cholera NOS 10/01/95 10/01/95 0020 Typhoid fever 10/01/95 10/01/95 0021 Paratyphoid fever a 10/01/95 10/01/95 0022 Paratyphoid fever c 10/01/95 10/01/95 0023 Paratyphoid fever c 10/01/95 10/01/95 0029 Paratyphoid fever c 10/01/95 10/01/95 0030 Salmonella enteritis 10/01/95 10/01/95 0031 Salmonella inf NOS 10/01/95 10/01/95 00322 Salmonella meningitis 10/01/95 10/01/95 00323 Salmonella arthritis 10/01/95 10/01/95 00324 Salmonella oneruyelitis 10/01/95 <th>cumentation</th> <th></th> <th></th>	cumentation		
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0010 CHOLERA D/T V/B CHOLERAE 10/01/95 06/15/11 0010 Cholera d/t v/b cholerae 10/01/11 1 0011 Cholera d/t v/b el for 10/01/95 1 0019 Cholera NOS 10/01/95 1 0020 Typhoid fever 10/01/95 1 0021 Paratyphoid fever a 10/01/95 1 0022 Paratyphoid fever c 10/01/95 1 0023 Paratyphoid fever c 10/01/95 1 0029 Paratyphoid fever C 10/01/95 1 0030 Salimonella enteritis 10/01/95 1 0031 Salimonella off V/S 1 1 00320 Local salimonella inf NOS 10/01/95 1 00321 Salimonella meningitis 10/01/95 1 00322 Salimonella oneunonia 10/01/95 1 00324 Salimonella oneunyelitis 10/01/95 1 00329 Local salimonella in fNEC 10/01/95 1	Code	Diagnosis Description	Effective Expire ICD 10?
0010 Cholera d/t vib cholerae 10/01/11 0011 Cholera d/t vib el tor 10/01/95 0019 Cholera NOS 10/01/95 0020 Typhoid fever 10/01/95 0021 Paratyphoid fever a 10/01/95 0022 Paratyphoid fever c 10/01/95 0023 Paratyphoid fever c 10/01/95 0029 Paratyphoid fever NOS 10/01/95 0030 Salmonella entertis 10/01/95 0031 Salmonella entertis 10/01/95 00320 Local salmonella in NOS 10/01/95 00321 Salmonella meningtis 10/01/95 00322 Salmonella meningtis 10/01/95 00321 Salmonella meningtis 10/01/95 00322 Salmonella antritis 10/01/95 00323 Salmonella antritis 10/01/95 00324 Salmonella in NEC 10/01/95	001	CHOLERA*	10/01/97 12/31/98
0011 Cholera drt vib el tor 10/01/95 0019 Cholera NOS 10/01/95 0020 Typhoid fever 10/01/95 0021 Paratyphoid fever a 10/01/95 0022 Paratyphoid fever b 10/01/95 0023 Paratyphoid fever b 10/01/95 0023 Paratyphoid fever c 10/01/95 0029 Paratyphoid fever NOS 10/01/95 0031 Salmonelia septicemia 10/01/95 00320 Local salmonelia neningtiis 10/01/95 00321 Salmonelia neningtiis 10/01/95 00322 Salmonelia neningtiis 10/01/95 00323 Salmonelia neningtiis 10/01/95 00324 Salmonelia neningtiis 10/01/95 00329 Local salmonelia in NEC 10/01/95	0010	CHOLERA D/T VIB CHOLERAE	10/01/95 06/15/11
0019 Cholera NOS 1001/95 0020 Typhoid fever 1001/95 0021 Paratyphoid fever a 1001/95 0022 Paratyphoid fever b 1001/95 0023 Paratyphoid fever c 1001/95 0029 Paratyphoid fever NOS 1001/95 0021 Salmonella septicemia 1001/95 0023 Paratyphoid fever c 1001/95 0029 Paratyphoid fever NOS 1001/95 0030 Salmonella septicemia 1001/95 0031 Salmonella inf NOS 1001/95 00322 Salmonella meningitis 1001/95 00323 Salmonella antritis 1001/95 00324 Salmonella antritis 1001/95 00329 Local salmonella in NEC 1001/95	0010	Cholera d/t vib cholerae	10/01/11
0020 Typhoid fever 1001/95 0021 Paratyphoid fever a 1001/95 0022 Paratyphoid fever b 1001/95 0023 Paratyphoid fever C 1001/95 0029 Paratyphoid fever NOS 1001/95 0030 Salmonella entertisis 1001/95 0031 Salmonella entertisis 1001/95 00320 Local salmonella inf NOS 1001/95 00321 Salmonella pneumonia 1001/95 00322 Salmonella anteritisis 1001/95 00324 Salmonella osteomyetitis 1001/95 00329 Local salmonella in NEC 1001/95	0011	Cholera d/t vib el tor	10/01/95
0021 Paratyphoid fever a 10/01/95 0022 Paratyphoid fever b 10/01/95 0023 Paratyphoid fever c 10/01/95 0029 Paratyphoid fever NOS 10/01/95 0030 Salmonella entertiis 10/01/95 0031 Salmonella entertiis 10/01/95 00320 Local salmonella inf NOS 10/01/95 00321 Salmonella meningitis 10/01/95 00322 Salmonella meningitis 10/01/95 00323 Salmonella antritis 10/01/95 00324 Salmonella osteomyetitis 10/01/95 00329 Local salmonella in NEC 10/01/95	0019	Cholera NOS	10/01/95
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0029 Paratyphoid fever NOS 10/01/95 0030 Salmonella enteritis 10/01/95 0031 Salmonella septicemia 10/01/95 00320 Local salmonella inf NOS 10/01/95 00321 Salmonella pneumonia 10/01/95 00322 Salmonella pneumonia 10/01/95 00323 Salmonella arthritis 10/01/95 00324 Salmonella inf NEC 10/01/95	0022	Paratyphoid fever b	10/01/95
0030 Salmonella entertitis 10/01/95 10/01/95 0031 Salmonella septicemia 10/01/95 10/01/95 00320 Local salmonella inf NOS 10/01/95 10/01/95 00321 Salmonella preumonia 10/01/95 10/01/95 003223 Salmonella arthritis 10/01/95 10/01/95 00324 Salmonella osteomyelitis 10/01/95 10/01/95 00329 Local salmonella in f NEC 10/01/95 10/01/95	0023	Paratyphoid fever c	10/01/95
0031 Salmonella septicemia 10/01/95 00320 Local salmonella inf NOS 10/01/95 00321 Salmonella meningitis 10/01/95 00322 Salmonella pneumonia 10/01/95 00323 Salmonella arthritis 10/01/95 00324 Salmonella osteomyeltis 10/01/95 00329 Local salmonella in NEC 10/01/95	0029	Paratyphoid fever NOS	10/01/95
00320 Local salmonella inf NOS 10/01/95 00321 Salmonella meningitis 10/01/95 00322 Salmonella onterumonia 10/01/95 00323 Salmonella arthritis 10/01/95 00324 Salmonella ontervejitis 10/01/95 00329 Local salmonella inf NEC 10/01/95	0030	Salmonella enteritis	10/01/95
00321 Salmonella meningitis 10/01/95 00322 Salmonella pneumonia 10/01/95 00323 Salmonella arthritis 10/01/95 00324 Salmonella osteomyelitis 10/01/95 00329 Local salmonella inf NEC 10/01/95	0031	Salmonella septicemia	10/01/95
00322 Salmonella pneumonia 10/01/95 00323 Salmonella arthritis 10/01/95 00324 Salmonella osteomyelitis 10/01/95 00329 Local salmonella inf NEC 10/01/95	00320	Local salmonella inf NOS	10/01/95
00322 Salmonella pneumonia 10/01/95 00323 Salmonella arthritis 10/01/95 00324 Salmonella osteomyelitis 10/01/95 00329 Local salmonella inf NEC 10/01/95	00321	Salmonella meningitis	10/01/95
00324 Salmonella osteomyelitis 10/01/95 00329 Local salmonella inf NEC 10/01/95	00322		10/01/95
00329 Local salmonella inf NEC 10/01/95	00323	Salmonella arthritis	10/01/95
	00324	Salmonella osteomyelitis	10/01/95
	00329	Local salmonella inf NEC	10/01/95
UU38 Saimonella Intection NEC 10/01/95	0038	Salmonella infection NEC	10/01/95
0039 Salmonella infection NOS 10/01/95	0039	Salmonella infection NOS	10/01/95



- 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

er Menu > 1 - Master Informa	K C C	> 10 - Mu	tiple Procedure A	mounts Maintenance > LOV - Procedure Cod	de Inquiry	() <i>«</i>		
ocedure Code	Inquiry						OFFC Phy	ysician Office Test Dat
Detail Information	User Docu	umentati	on					
	Fee Sch	Туре	Pr Code	Description	Deactive	Group Code		
		A	1	OVERPAYMENT		1	A	
		A	1	OVER PAY		12		
		A	1	OVERPAYMENT		ALL		
		A	121344	TEST		ALL	12	
		A	123	PARENTS OWE		ALL		
		A	181818	JD TEST		ALL		
		A	20	MEDICARE ADJUSTMENT		12		
	1	A	222	INS DENIED		ALL		
	1	A	22222	APPL TO DED.		ALL		
		A	333	TO DEDUCTIBLE		ALL		
	1	A	33333	CO-INSURANCE PYMT		ALL		
	1	A	44444	MEDICARE DENIAL		ALL		
		A	456	PHV OWES PART.HOSPITAL		ALL		
	1	A	555	COPAY/COINSURANCE		ALL		
	1	A	55555	PT OWES		ALL		
	1	A	556	CARE CHOICE RISK RESERVE		ALL		



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

a Medmaqr - User. Master Menu > 1 - Master Information Maintenance > 7 - Billing Messages							
Billing Messages					OFF	FC 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.	<u> </u>		
12	PP	30	1	PLEASE REMIT PAYMENT IMMEDIATELY AS YOUR ACCOUNT	_3		
12	PP	30	2	BALANCE IS PAST DUE	_3		
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.

		у							OFF	C Ph	ysiciar	n Office Te
Information	Ad	count Insurance	User	Documentation	า							
Г	Last Name	First Name	SSN	Birthday	Group	Account	Med Rec	Dr#	Balance	FC	Δ	1
	SMITH	JEN	999887777	10/07/1973	237002	0101	ABC123	0	0.00	SI	D	
	DUFFEY	SUNDAY	123456789	10/07/1973	237002	010101	Aberzo	1	0.00	MC		1
	DUFFEY	SUNDAY	123456789	10/07/1973	12	010101	S00007.1	1	4957.00	мс	9	
	CLINIX	DAN	123456789	10/07/1973	12	010101L	50000111	700	0.00	MG		
	DUFFEY	SUNDAY	123456789	10/07/1973	12	010101WC		1	0.00	мс		
	SIMER	BUBBA		01/02/2007	237002	0102			0.00	мс		
	SIMER	BUBBA		10/07/1973	12	0102			0.00	SI		
		BOB	000000000	05/24/1977	12	01026	10000084966	1	1624.60	BS		
	MARLEY					01026WC	A123456DEF	2	-145.00	МС		
1			568974586	02/15/1945	12			_				
1	MARLEY ORMSBY SIMER	BILLY	568974586	02/15/1945 10/07/1973	12 12	01020000		1	0.00	MG		
	ORMSBY	BILLY	568974586					1	0.00	MG PP		
	ORM SBY SIMER	BILLY KIT	568974586	10/07/1973	12	0104		1				
	ORM SBY SIMER SIMER	BILLY KIT KIT	568974586	10/07/1973 10/07/1973	12 237002	0104 0104		1	0.00	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.

rance i or	All Acc	ounts					OFFC Physic	cian Office Test [
etail Account		Acct Ins Deta	il User Docu	mentation				
	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		8
	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		



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.