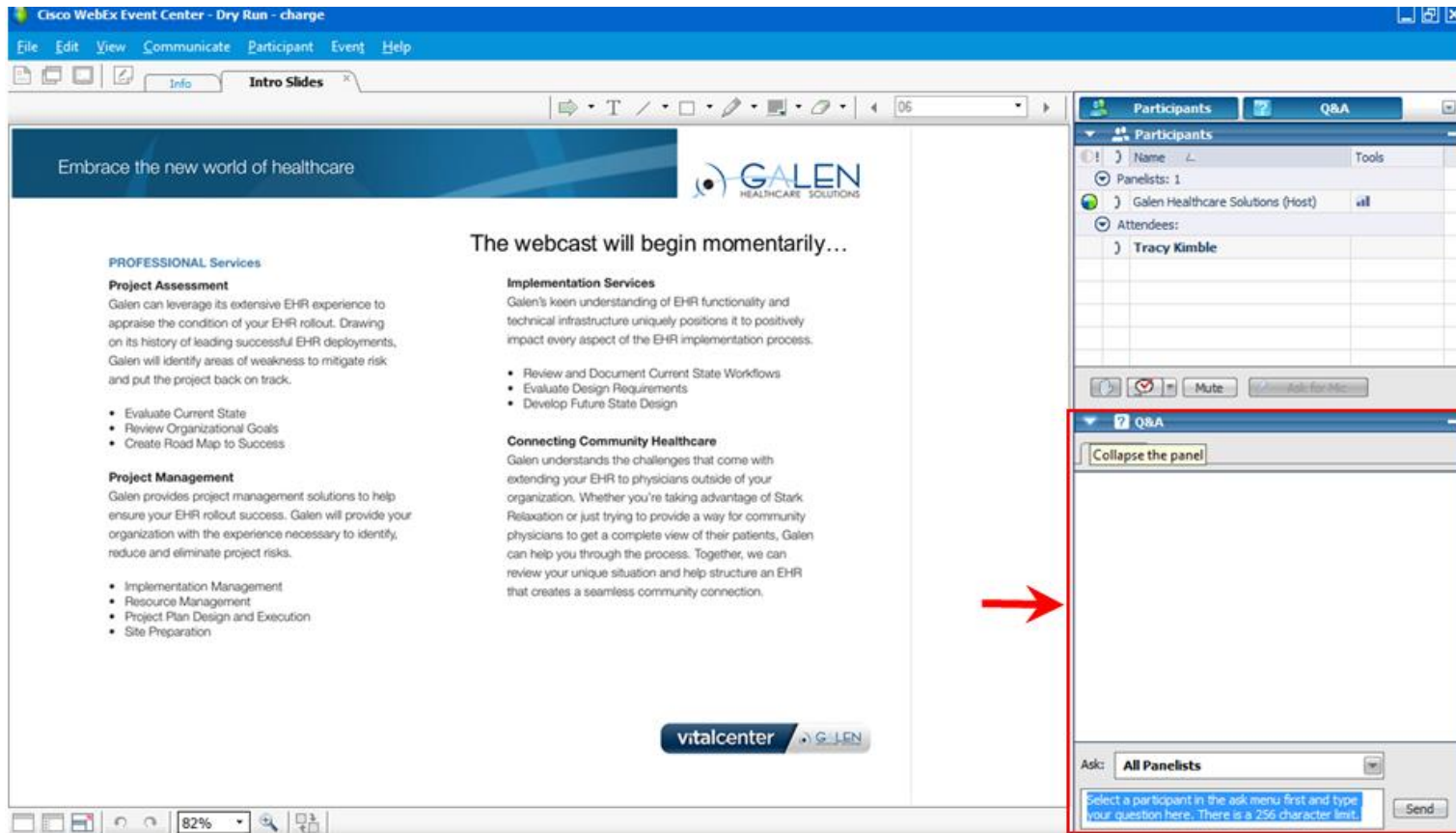


Your phone has been automatically muted. Please use the Q&A panel to ask questions during the presentation!



The screenshot shows a Cisco WebEx Event Center window titled "Cisco WebEx Event Center - Dry Run - charge". The main presentation area displays a slide with the title "Embrace the new world of healthcare" and the Galen Healthcare Solutions logo. The slide content is divided into three sections: "PROFESSIONAL Services", "Implementation Services", and "Connecting Community Healthcare".

PROFESSIONAL Services

Project Assessment

Galen can leverage its extensive EHR experience to appraise the condition of your EHR rollout. Drawing on its history of leading successful EHR deployments, Galen will identify areas of weakness to mitigate risk and put the project back on track.

- Evaluate Current State
- Review Organizational Goals
- Create Road Map to Success

Project Management

Galen provides project management solutions to help ensure your EHR rollout success. Galen will provide your organization with the experience necessary to identify, reduce and eliminate project risks.

- Implementation Management
- Resource Management
- Project Plan Design and Execution
- Site Preparation

Implementation Services

Galen's keen understanding of EHR functionality and technical infrastructure uniquely positions it to positively impact every aspect of the EHR implementation process.

- Review and Document Current State Workflows
- Evaluate Design Requirements
- Develop Future State Design

Connecting Community Healthcare

Galen understands the challenges that come with extending your EHR to physicians outside of your organization. Whether you're taking advantage of Stark Relaxation or just trying to provide a way for community physicians to get a complete view of their patients, Galen can help you through the process. Together, we can review your unique situation and help structure an EHR that creates a seamless community connection.

The webcast will begin momentarily...

Participants

Name	Tools
Panelists: 1	
Galen Healthcare Solutions (host)	
Attendees:	
Tracy Kimble	

Q&A

Collapse the panel

Ask: All Panelists

Select a participant in the ask menu first and type your question here. There is a 256 character limit.

Send

Allscripts Practice Management Basics

July 25, 2014

Enabling physician groups to realize the full potential of Electronic Health Records



vitalcenter



Presenters:

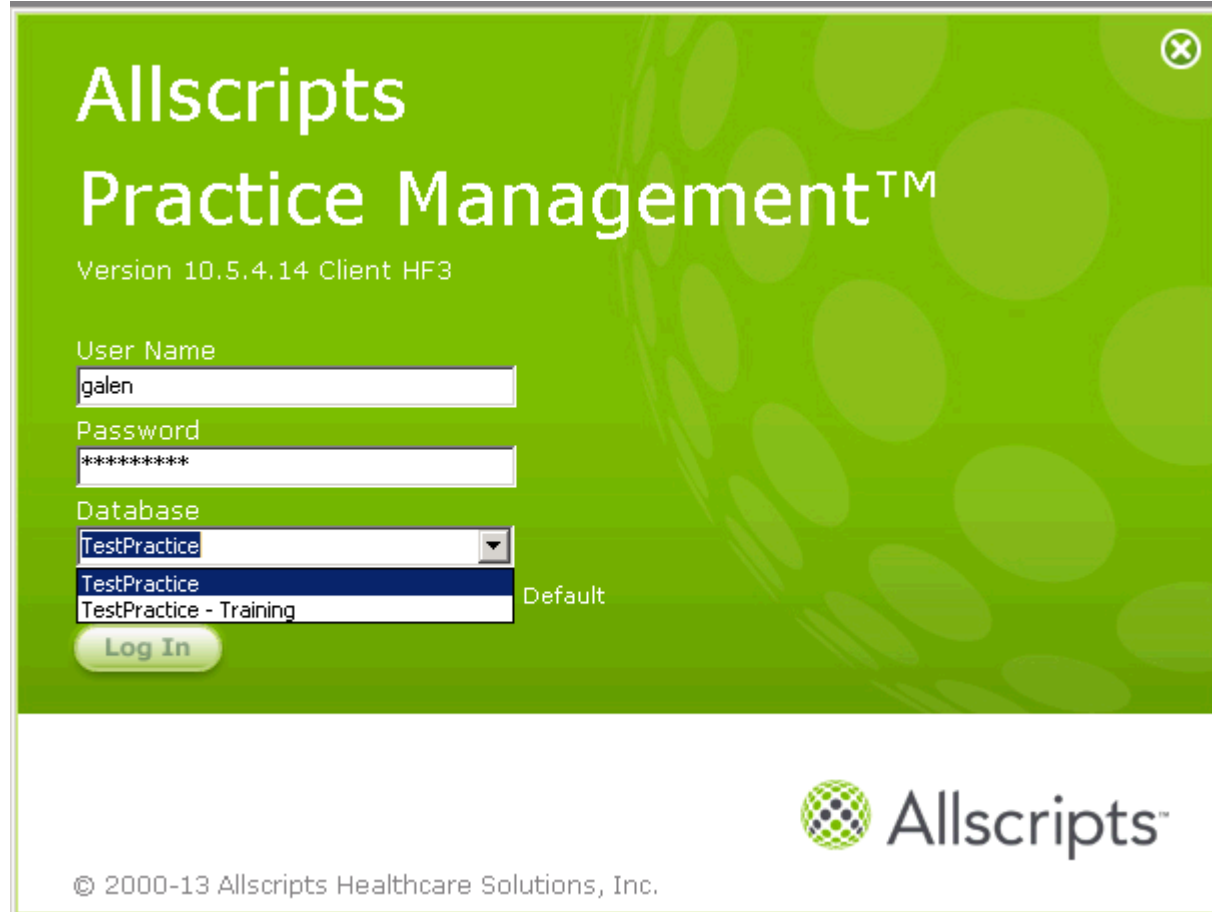
Larson Yuill -
Senior Clinical Consultant



Kim Baxter -
Professional Services Consultant



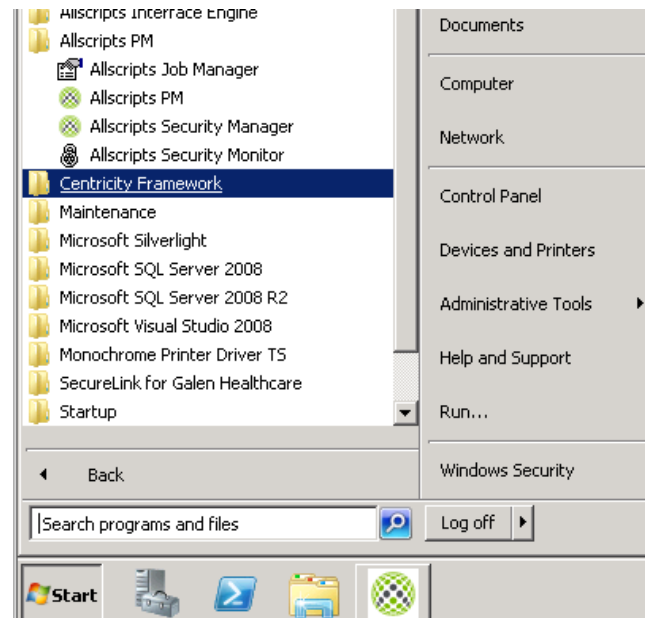
Where to find all the parts?

The login screen for Allscripts Practice Management. It has a green background with a pattern of overlapping circles. The title 'Allscripts Practice Management™' is at the top, followed by 'Version 10.5.4.14 Client HF3'. Below are input fields for 'User Name' (containing 'galen'), 'Password' (containing '*****'), and 'Database' (a dropdown menu with 'TestPractice' selected). To the right of the database dropdown is the word 'Default'. A 'Log In' button is at the bottom left. The Allscripts logo and copyright notice '© 2000-13 Allscripts Healthcare Solutions, Inc.' are at the bottom.

Where to find all the parts?

Start menu > All Programs you will find an Allscripts PM folder.

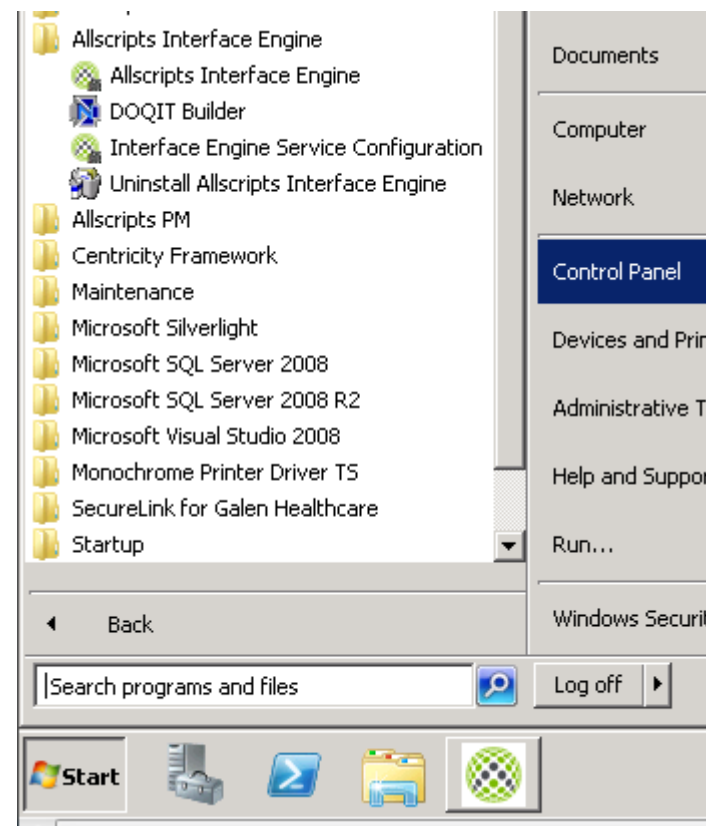
- **Allscripts Job Manager**
 - Monitor printing jobs
- **Allscripts PM**
 - Same as desktop icon
- **Allscripts Security Manager**
 - Where you set user security
- **Allscripts Security Monitor**
 - Allows system admins ability to view who is actively logged into the application.
- **Not all user will have these icons. Many times they are limited to system admin users and reside on the PM server.**



Where to find all the parts?

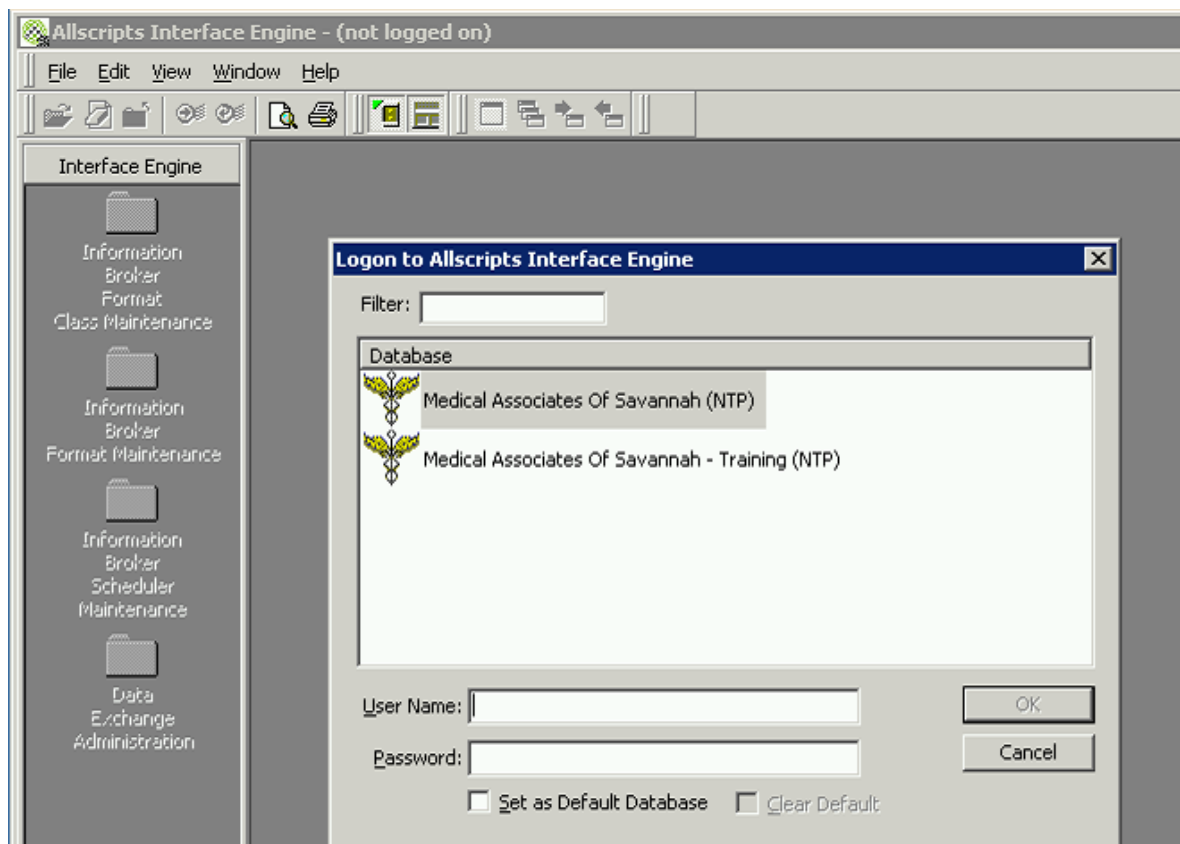
Also under the Start> All Programs you will find the Allscripts Interface Engine Applications.

- The actual Allscripts Interface Engine
- The DOQIT Builder
- Interface Engine Service Configuration
- Uninstall file



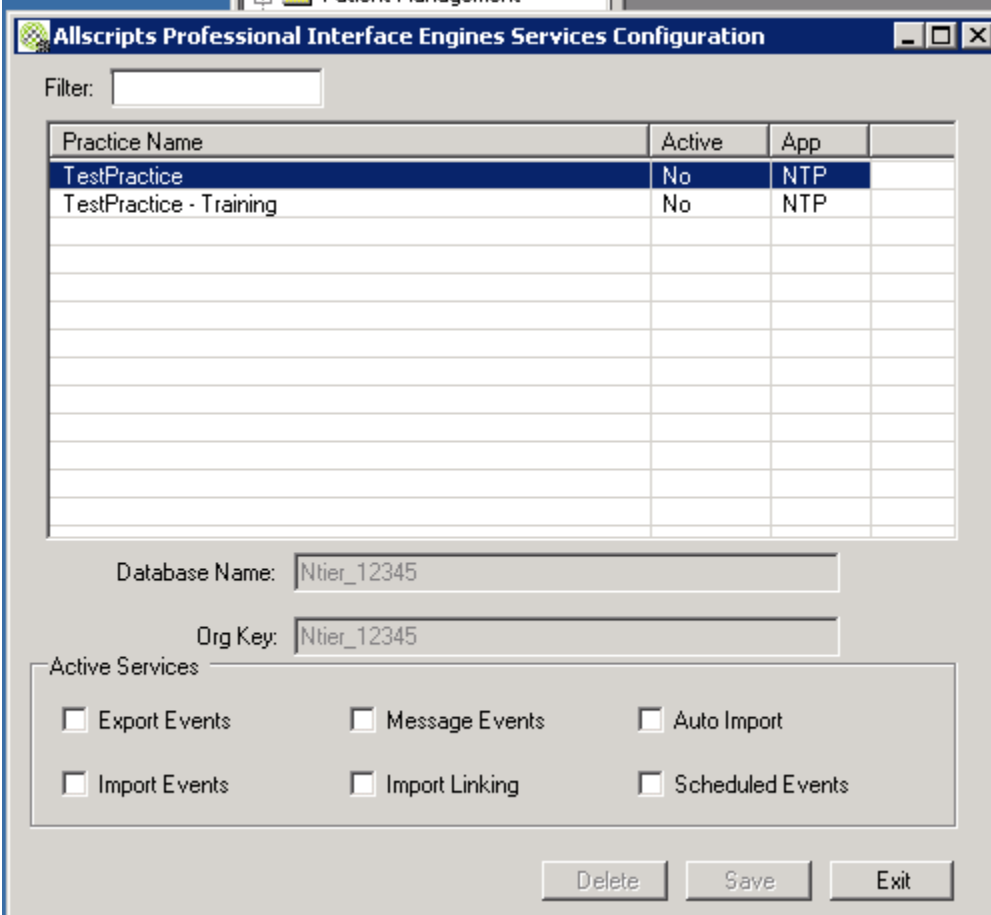
Where to find all the parts?

The AIE is a Home-Grown Interface Engine by Allscripts and comprised of several different Maintenance Folders and a Utilities program that is used to schedule Bulk Loads into your EHR application.



Where to find all the parts?

Utility you use to configure a PM database to use AIE and which specific services (those six check boxes) to use. This is something generally only accessed when setting up a new PM database or something in the process of a PM COE.



The screenshot shows the 'Allscripts Professional Interface Engines Services Configuration' window. It features a table with columns for Practice Name, Active status, and App. Below the table are input fields for Database Name and Org Key, both containing 'Ntier_12345'. At the bottom, there are six checkboxes for Active Services: Export Events, Import Events, Message Events, Import Linking, Auto Import, and Scheduled Events. All checkboxes are currently unchecked. At the very bottom are buttons for Delete, Save, and Exit.

Practice Name	Active	App
TestPractice	No	NTP
TestPractice - Training	No	NTP

Filter:

Database Name:

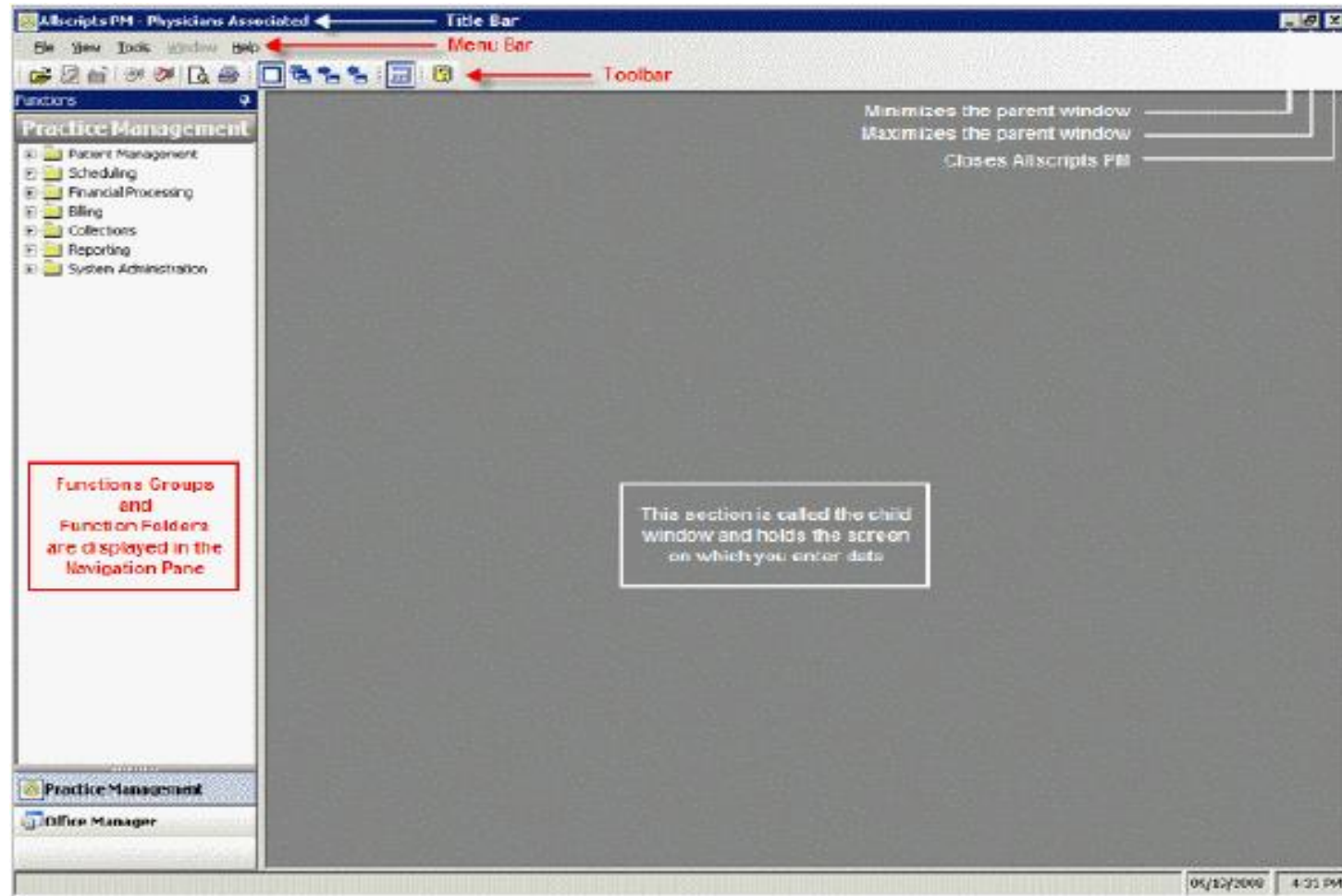
Org Key:

Active Services








☐ Export Events ☐ Message Events ☐ Auto Import

☐ Import Events ☐ Import Linking ☐ Scheduled Events

Navigation



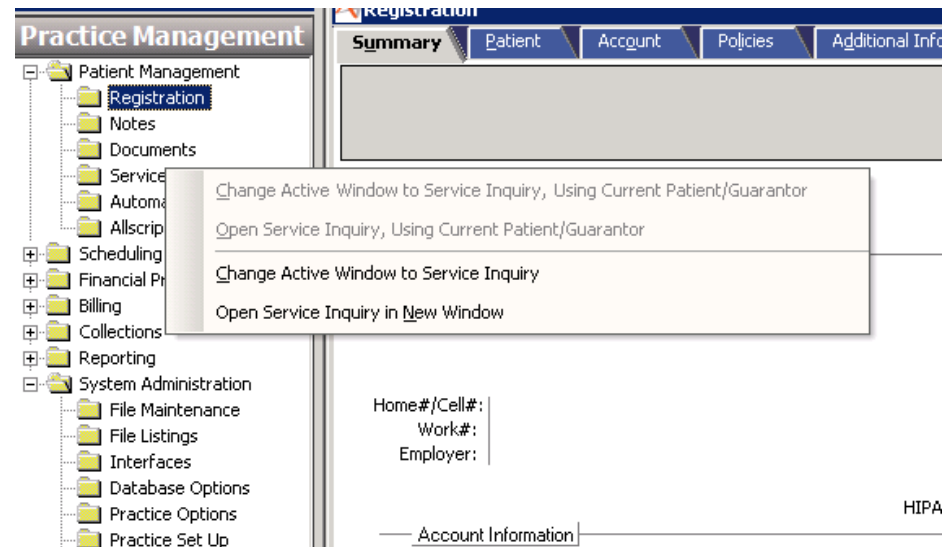
Icons

Icon	Function	Keyboard shortcut
	Find by Key	Enter the value, and then press TAB .
	Search	Enter letters of last name in a Patient box, and then press ALT + Down Arrow ; for searches other than patient, press ALT + Down Arrow to open a lookup window.
	Add New <name of record> or New	Position the cursor in a field or a frame, and then press Insert .
	Delete	Highlight the value, and then press Delete .
	Memo Appointment	Position the cursor in a field, and then press ALT+Shift+Down Arrow .
	Potential Patient	Position the cursor in the field, and then press ALT+Insert .
	Dialog	Position the cursor in the field, and then press Shift+Down Arrow .

Tips and Tricks

– Moving between open panes

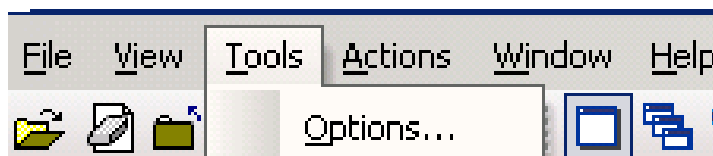
- F9 - Keeps current window open
- Right click the navigation pane for opening, closing and bringing other windows to the front.



- Use the navigation icons in the toolbar.

Tips and Tricks

If your workflow allows it, it is recommended to set defaults for your schedules and batches to save time.



Options for user Kim.Baxter on this workstation

Scheduling | Batches | External Access

Defaults

Sched. Dept:

Sched. Location:

Resource:

Coverage Type:

Patient Management

- **Patient Registration**
 - Summary Tab
 - At a glance view of
 - >Patient Demographics
 - >Account Information – Guarantor, Subscriber, etc.
 - >Policy Information - Type, Carrier, Status
 - Patient Tab
 - Change information or create a new account from this screen
 - Account Tab
 - Account Type – Medicare, Standard, Workers Comp
 - Contact Information – Parents, Spouse, Emergency Contact
 - Policies Tab
 - Contains detailed information regarding Insurance Policies
 - Additional Information
 - HIPAA, Race, Ethnicity, Language, AKA, etc.
 - Chart tab

Summary Patient Account Policies Additional Info Chart

Helpdesk A Test

DOB: 07/16/1970

Sex: M

SSN: 999-99-9999

Age: 42 years

Patient: Helpdesk A Test



Patient#: 2235940

Enterprise#:

Patient Information

Helpdesk A Test
PO Box 33
350 N Humphreys Apt 111
Memphis, TN 38120

Sex: Male SSN: 999-99-9999
Birth Date: 07/16/1970 Age: 42 years
Usual Provider:
Referring Dr:
Prim Care Phys: Light MD, William H
Med. Rec. Loc:
Med. Rec. No:
Primary Language: English
How did you hear abo: Health Ministry
AKA: Debby

Home#/Cell#: (301) 123-1234 /

Work#:

Employer:

patient screen

Account Information

Contact	Type	Home#
Mom Test	Guar,Sub,Emg	(301) 123-1234
Helpdesk A Test	Pat,Sub	(301) 123-1234

Account# 2235940 Acct Type: STANDARD
Mom Test
350 N Humphreys Apt 111 PO Box 33
Memphis, TN 38120

Home#/Cell#: (301) 123-1234

Work#:

Policy Information

Coverage	Carrier	Status
Other	BC Access TN	Expired
Other	Veteran Administration	Expired
Other	AARP	Expired
Other	Pilot Administration Center	
Other	oFedex	

Subscriber: Helpdesk A Test
Certificate ID: 1234
Group Name:
Group Number:
Carrier Contact:
Carrier#: (866) 636-0080

Coverage Type: Medical

Summary

Patient

Account

Policies

Additional Info

DOB:

Sex:

SSN:

Age:

— Patient Information

Patient:   

Patient#: SSN:

Home Tel#: Ext:

Last Name:

Work Tel#: Ext:

First, MI: Suffix:

Cell#:

Address 1:

Sex:

Address 2:

Birth Date:

City: State:

Employer:  

Zip Code:   Country:

E-Mail:

Enterprise#:

Usual Prov:

Marital:

Referring Dr: 

Employment:

PCP: 

Student:

Med. Rec. Loc:

Inactivation Date:

Med. Rec. No:

HIPAA Stmt Exp:

Rel to Guar:

Comments:

Summary

Patient

Account

Policies

Additional Info

DOB:

Sex:




SSN:

Age:

Account Information

Acct Type:

Comments:

Contact	Type	Home#
		
		
		

☐ Guar ☐ Stmts ☐ Subscriber

Last Name:

First, MI: Suffix:

Address 1:

Address 2:

City: State:

Zip Code:   Country:

Home Tel#: Ext:

Work Tel#: Ext:

Cell#:

Sex:

Birth Date:

SSN:

Employer:  

E-Mail:

Comments:

☐ Emergency Contact

Relation to Patient:

Summary Patient Account **Policies** Additional Info

DOB: Sex:
SSN: Age:

Policy Information

Coverage	Coverage Type	Carrier	Status	Plan	Subscriber

Coverage:

Insurance:

Eff Date: Exp Date:

Asgn:

Subscriber:

Cert No.:

Grp Name:

Group No.:

Policy Tel#: Ext:

Patient's Relationship:

Patient's Cert Suffix:

Subscriber's Cert Suffix:

Subscriber's Birth Date:


☐ Secondary Co-Pay Coverage

Comments:

Summary Patient Account Policies **Additional Info**

DOB:	Sex:
SSN:	Age:

— Patient Additional Information —

Field Name	Field Value	
Alias		
Marketing Referral Source		▼
Research Patient		▼
Pacemaker Brand		▼
Pacemaker Model		▼
Date of Death		
Eye Glasses Prescription		
Contact Lens Prescription		
Hospital Account Number		
Medicare ABN (Does Not Pay)		▼
Medicare ABN (Denied as too Frequent)		▼
Medicare ABN (Experimental)		▼
HIPAA Acknowledgement		▼
Pager Number		
Maiden Name		
Race/Ethnicity		▼
Preferred Language		▼
Occupation		

Scheduling

- **Appointment Scheduling Tab**
 - Appointment Scheduling Options – Including patient registration at the time of appointment.
- **Scheduling Activities**
 - Tabs are like shortcuts to simple document printing tasks (schedules, documents, encounter forms, etc.)
- **Scheduling Reports**
 - More detailed reports – Appointment Detail, Recall Report, Appointment Analysis and Encounter Tracking.
- **Schedule Planning**
 - Block time by Calendar
 - Block time by Criteria
- **Referrals**
 - Referral Exception Report
 - Outgoing Referral Report
 - Outgoing Referral Documents

[illegible]

Day Type: Normal Thursday Schedule
Activity: Acute Visit
From: 01:00 PM To: 02:45 PM Usual Duration: 15
Elig: Acute, OV, OV - 5

File View Tools Actions Window Help

Functions

Practice Management

- Patient Management
- Scheduling
 - Appointment Scheduling
 - Scheduling Activities
 - Scheduling Reports
 - Schedule Planning
 - Referrals
- Financial Processing
- Billing
- Collections
- Reporting
- System Administration

Appointment Scheduling - Appointment Management

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

Stored Job: [] Store...

Sched. Dept: Medical Department

Sched. Location: Professional Clinic - Main Location

Resource: Dr Bones

By Appt Date: 04/21/2014 04/21/2014 Query

Appointment Status

- ☒ Scheduled (2)
- ☒ Wait List
- ☒ Confirmed
- ☒ Acknowledged
- ☒ Bumped
- ☐ Cancelled
- ☐ No Show
- ☐ Med Rec Reqs

R	C	Date	Day	Time	Location	Department	Resource	Patient	Appt Type	Dur	Status
		04/21/2014	Mon	09:15 AM	PC-Main	Medical	Bones	Test, Ada C	F/UP 15	15	Sched
		04/21/2014	Mon	01:45 PM	PC-Main	Medical	Bones	Allscripts, Justin	AC-1	15	Sched

Appointment Detail

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


Practice Management

Office Manager

Appointment Detail



Patient:	Ada C Test 75 Federal Street 2 Boston, MA 02115	Patient#:	5027310
		Enterprise#:	101026
		Self-Pay Balance:	\$0.00
		Med. Rec. No:	
		Home Tel#:	(617) 123-4567
Comment:		Work Tel#:	
		Employer:	
		Birth Date:	05/25/1920 Age: 93 years

Date/Time:	04/21/2014 09:15 AM	Status:	<input checked="" type="radio"/> Scheduled <input type="radio"/> Bumped <input type="radio"/> Wait List <input type="radio"/> Cancelled <input type="radio"/> Confirmed <input type="radio"/> No Show <input type="radio"/> Acknowledged <input type="radio"/> Med Rec Request
Sched Loc:	Professional Clinic - Main Location	Ack. Time In:	<input type="text"/>
Sched Dept:	Medical Department	Started:	<input type="text"/>
Resource:	Dr Bones	Check Out:	<input type="text"/>
Appt Type:	Follow Up Appt (15 Minutes)	Cancel Reason:	<input type="text"/>
Duration:	15	Coverage Type:	Medical
Encounter:	Not printed Encounter# 953330	Referring Dr:	<input type="text"/> 
Med Rec Slip:	Not printed	Referrals...	No Referral
Booked By:	csi on 04/21/2014 04:53 PM	<input type="checkbox"/> Referral Required	Coverage: <input type="text"/>
Confirmed By:			
Ack. By:			
Cancelled By:			

Request Eligibility...

Comments: bp follow up

Financial Processing

- **Financial Inquiry**
 - Account Inquiry
 - Payment History
- **Transactions**
 - Batch Management
 - Charge Entry
 - Edits
 - Validate Batches
 - Verify Claims
- **Automatic Transactions**
 - Transfer Account Balances
 - Adjust Balances
 - Import Remittances
 - Import Charges
 - Unassigned Payment Management
 - Recalculate Anesthesia Charges
 - Split Care Fee Calculation
 - Credit Balance Report
 - Finance Charges

Financial Inquiry						Payment History	
						DOB:	Sex:
						SSN:	Age:
Patient: <input type="text"/>						Patient#:	DOB:
						Guarantor:	
Acct Type:						Home Tel#:	
Comments:						Work Tel#:	
	Current	31-60 Days	61-90 Days	Over 90	Balance	All Providers	
Self						All Departments	
Insur						Patient Items	
Collect						Open Items Only	
						All Ages/Payers	
							Requery
Service Date	Voucher#	Provider	Chg Amt	Pmts/Adjs	Balance	Payor	Coverage Type
AA	Billed Date	Age					

- **Financial Analysis**

- Daily Charge Analysis
- Daily Payment Analysis
- Daily Void Analysis
- Daily Batch Analysis
- Unassigned Payment Analysis
- Bank Reconciliation Report

- **Financial Posting**

- Transaction Journal
- Print Refund Checks

Financial Analysis - Daily Charge Analysis

Daily Charge Analysis | Daily Payment Analysis | Daily Void Analysis | Daily Batch Analysis | Unassigned Payment Analysis | Batch Summary

Stored Job: [Dropdown]

Report Preferences: [Text Area] [Print Icon]

Batch Status:

- ☐ Open Batches
- ☐ Closed Batches
- ☐ Updated Batches

From : [Date Picker] To : [Date Picker] [Query Button]

☐ Select All

Status	Date Updated	Opened By	Batch#	Correction	Amount
--------	--------------	-----------	--------	------------	--------

Select Actual Providers: [All Actual Providers] [Checkmark] [X]

Select Batch Categories: [All Batch Categories] [Checkmark] [X]

Select Billing Providers: [All Billing Providers] [Checkmark] [X]

Select Departments: [All Departments] [Checkmark] [X]

Select Locations: [All Locations] [Checkmark] [X]

☐ Print Cover Page

[Store...] [Run]

Billing

- **Statement Processing**

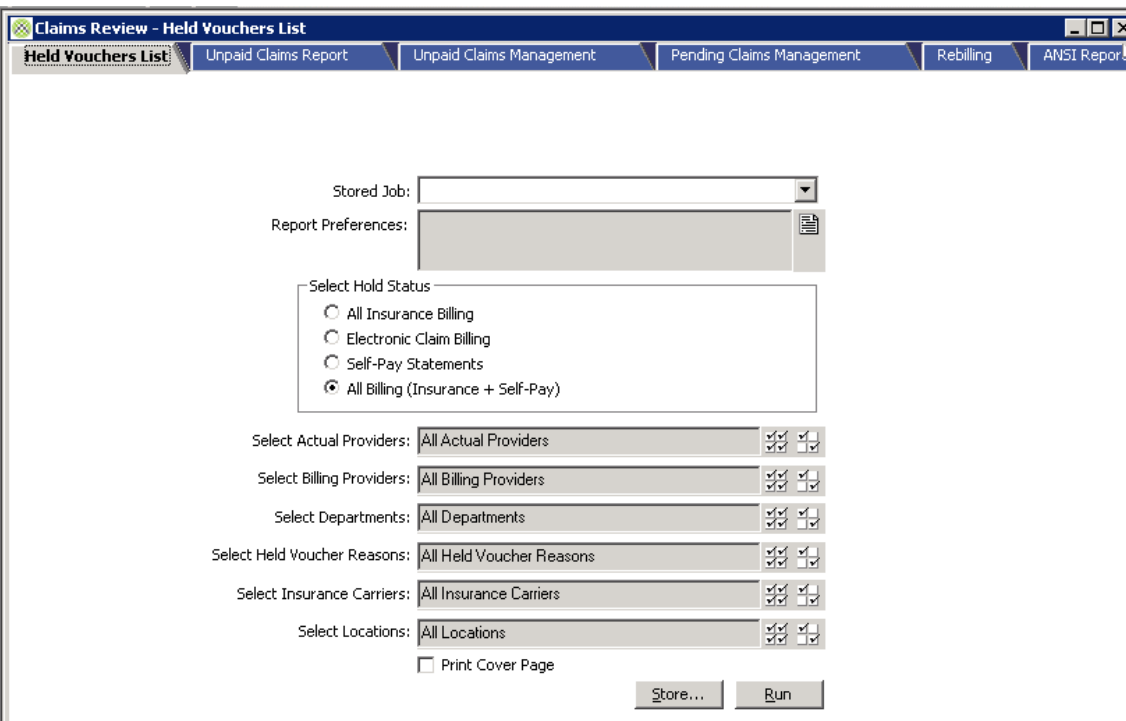
- Print Statements
- Statement Audit List

- **Insurance Billing**

- Validate Claims
- Prepare Electronic Claims
- Print Paper Claims

- **Claims Review**

- Held Vouchers
- Unpaid Claims Report
- Unpaid Claims Management
- Pending Claims Management
- Rebilling
- ANSI Reports



The screenshot displays the 'Claims Review - Held Vouchers List' application window. The title bar includes the application name and standard window controls. Below the title bar is a tabbed interface with the following tabs: 'Held Vouchers List' (active), 'Unpaid Claims Report', 'Unpaid Claims Management', 'Pending Claims Management', 'Rebilling', and 'ANSI Report'. The main content area contains the following fields and controls:

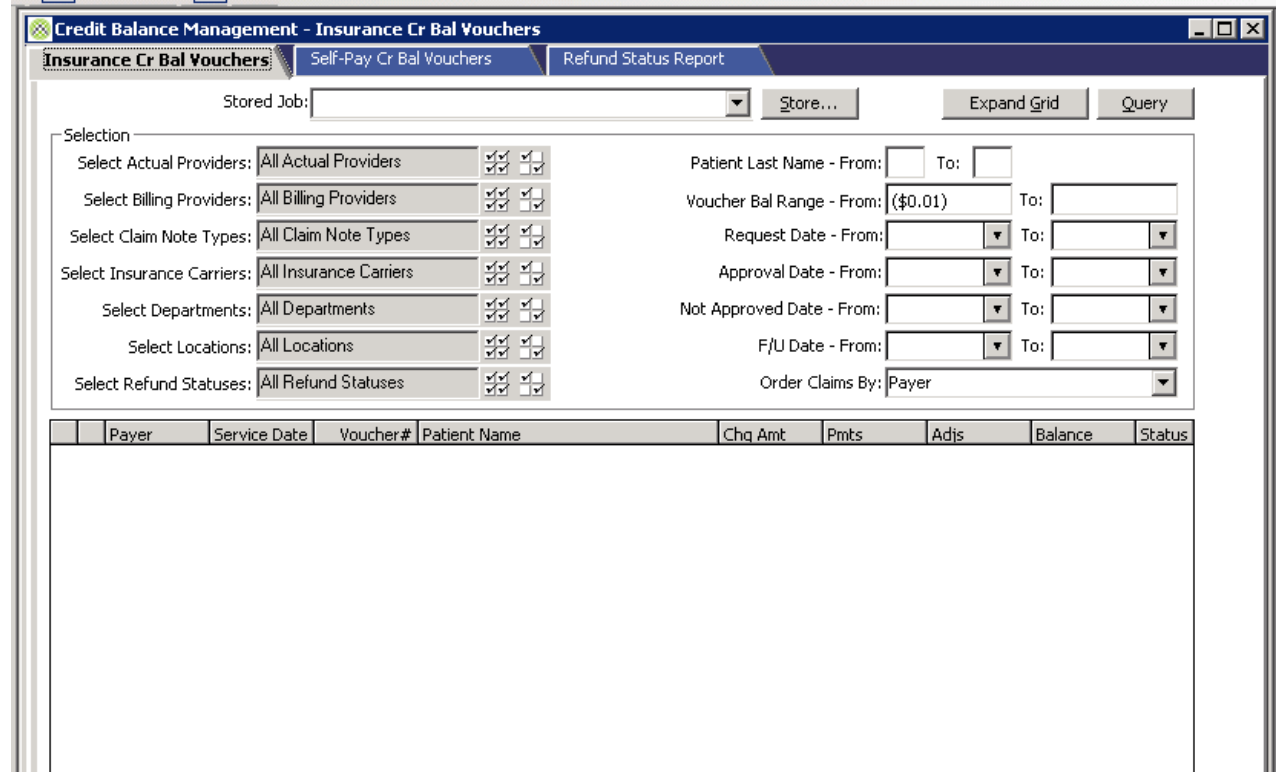
- Stored Job:** A dropdown menu.
- Report Preferences:** A text area with a document icon on the right.
- Select Hold Status:** A group box containing four radio buttons:
 - ☐ All Insurance Billing
 - ☐ Electronic Claim Billing
 - ☐ Self-Pay Statements
 - ☒ All Billing (Insurance + Self-Pay)
- Select Actual Providers:** A dropdown menu with 'All Actual Providers' selected.
- Select Billing Providers:** A dropdown menu with 'All Billing Providers' selected.
- Select Departments:** A dropdown menu with 'All Departments' selected.
- Select Held Voucher Reasons:** A dropdown menu with 'All Held Voucher Reasons' selected.
- Select Insurance Carriers:** A dropdown menu with 'All Insurance Carriers' selected.
- Select Locations:** A dropdown menu with 'All Locations' selected.
- ☐ Print Cover Page
- Buttons:** 'Store...' and 'Run' buttons at the bottom right.

- **Credit Balance Management**

- Ins. Credit Bal Vouchers
- Self-Pay Credit Bal Vouchers
- Refund Status Report

- **Occupational Medicine**

- Print Invoices
- Unpaid Invoices



The screenshot shows a software window titled "Credit Balance Management - Insurance Cr Bal Vouchers". It has three tabs: "Insurance Cr Bal Vouchers" (selected), "Self-Pay Cr Bal Vouchers", and "Refund Status Report".

Below the tabs, there is a "Stored Job:" dropdown menu, a "Store..." button, an "Expand Grid" button, and a "Query" button.

The main area is divided into two sections. The left section, labeled "Selection", contains several rows of selection criteria, each with a dropdown menu and two checkboxes:

- Select Actual Providers: All Actual Providers
- Select Billing Providers: All Billing Providers
- Select Claim Note Types: All Claim Note Types
- Select Insurance Carriers: All Insurance Carriers
- Select Departments: All Departments
- Select Locations: All Locations
- Select Refund Statuses: All Refund Statuses

The right section contains several date and range filters, each with a "From:" and "To:" dropdown menu:

- Patient Last Name - From: To:
- Voucher Bal Range - From: (\$0.01) To:
- Request Date - From: To:
- Approval Date - From: To:
- Not Approved Date - From: To:
- F/U Date - From: To:
- Order Claims By: Payer

At the bottom, there is a table with the following columns: Payer, Service Date, Voucher#, Patient Name, Chq Amt, Pmts, Adjs, Balance, and Status. The table is currently empty.

Prepare Collection Accounts

Assign Collection Accounts

Accounts with Self-Pay Balances Over:

days

Accounts with Self-Pay Balances greater than:

Accounts with no Self-Pay Payments within:

days

Required Minimum Payment:
or

% of Self-Pay Balance, whichever is greater

Change Guarantor Account Type To:

Select Account Types:
All Account Types

Selected Accounts:
All Accounts

Select Departments:
All Departments

Sort Option:
Account #

☐ Exclude Budget Accounts

☐ Select All

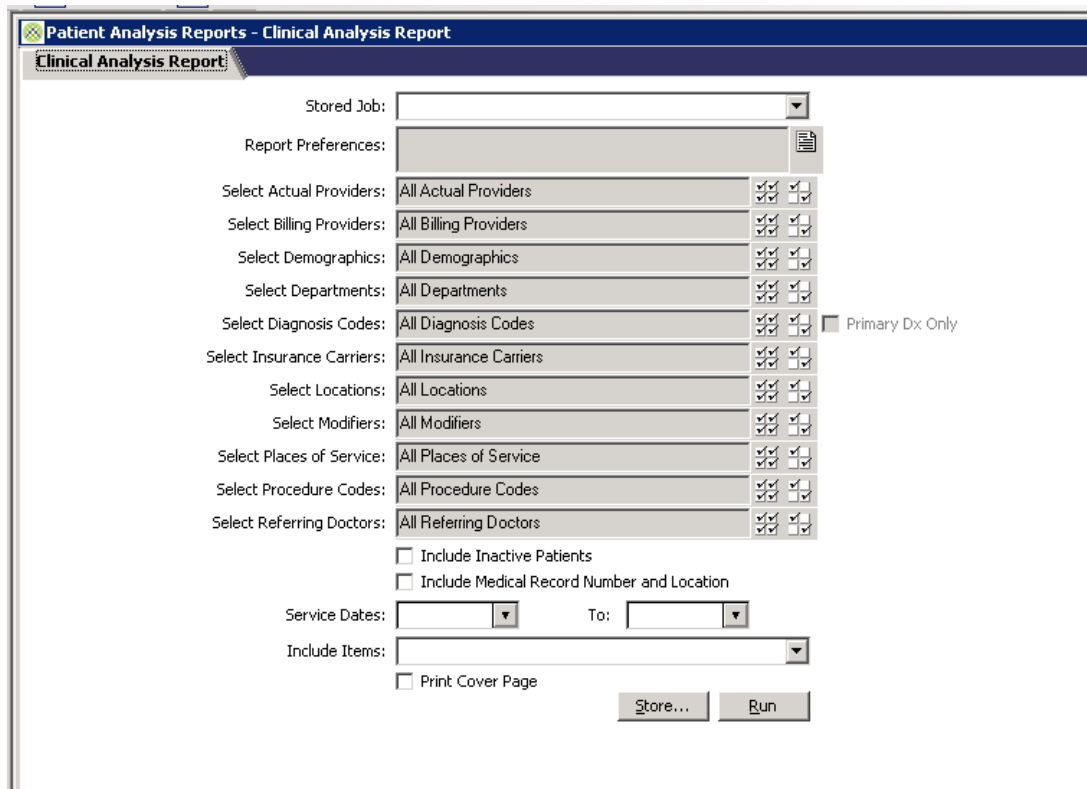
Account #	Guarantor/Details - Service Date V# (Provider/POS/Dept)	Acct Type	Self-Pay Balance	Age	Ta

☐ Preliminary Listing Only

- 

Reporting

- **Period End Reports**
 - Aged Trial Balance
 - Transaction Update Summary
 - Transaction Analysis
- **Comparative Analysis Reports**
 - A/R Analysis
 - Productivity Analysis
 - Procedure Analysis
 - Profile Analysis
 - Performance Variance Report
 - Performance Management Report
 - Revenue Detail Report
- **Payment Analysis Reports**
- **Patient Analysis Reports**

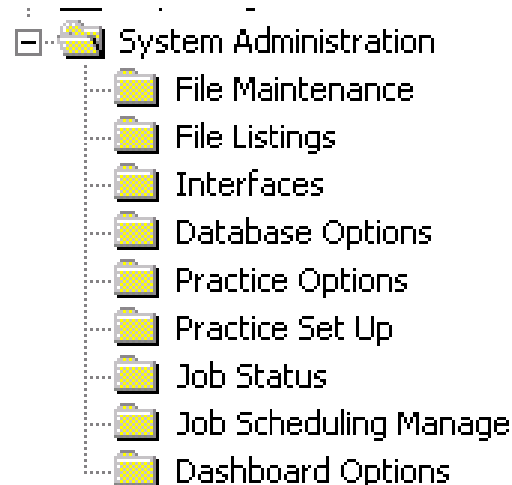


The screenshot displays the 'Patient Analysis Reports - Clinical Analysis Report' window. The title bar reads 'Patient Analysis Reports - Clinical Analysis Report'. Below the title bar, there is a tab labeled 'Clinical Analysis Report'. The main area contains several selection options and checkboxes:

- Stored Job: [Dropdown menu]
- Report Preferences: [Icon]
- Select Actual Providers: All Actual Providers [Grid of checkboxes]
- Select Billing Providers: All Billing Providers [Grid of checkboxes]
- Select Demographics: All Demographics [Grid of checkboxes]
- Select Departments: All Departments [Grid of checkboxes]
- Select Diagnosis Codes: All Diagnosis Codes [Grid of checkboxes] ☐ Primary Dx Only
- Select Insurance Carriers: All Insurance Carriers [Grid of checkboxes]
- Select Locations: All Locations [Grid of checkboxes]
- Select Modifiers: All Modifiers [Grid of checkboxes]
- Select Places of Service: All Places of Service [Grid of checkboxes]
- Select Procedure Codes: All Procedure Codes [Grid of checkboxes]
- Select Referring Doctors: All Referring Doctors [Grid of checkboxes]
- ☐ Include Inactive Patients
- ☐ Include Medical Record Number and Location
- Service Dates: [Dropdown] To: [Dropdown]
- Include Items: [Dropdown]
- ☐ Print Cover Page
- [Store...] [Run]

System Administration

- **File Maintenance**
- **File Listings**
- **Interfaces**
- **Database Options**
- **Practice Options**
 - General
 - Registration
 - Charge Entry
 - Payment Entry
 - Statement
 - Reporting
 - Scheduling
 - Referral
 - Collection
 - Replication
 - Enterprise
 - Occ. Med
 - Finance Charge
 - External Access



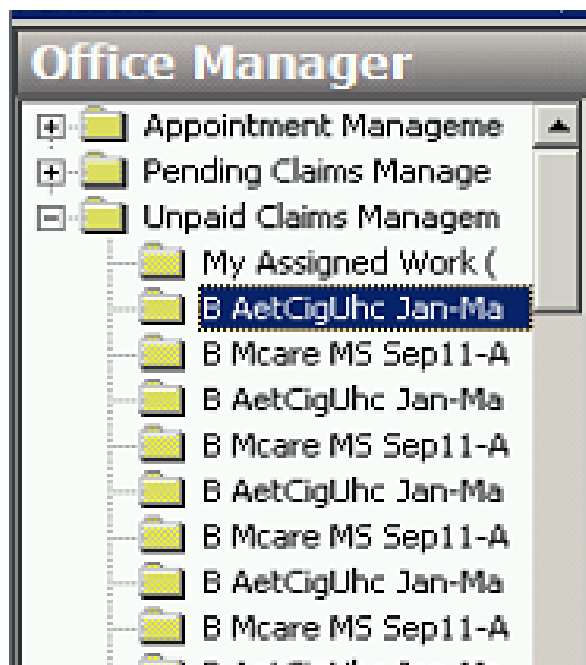
- **Practice Set Up**
 - Practice Information
 - Reporting Periods
 - Patient Additional Information
 - Profiles
 - Billing Numbers
 - Office Manager
 - History
- **Job Status**
- **Job Scheduling**
- **Dashboard Options**
 - Dashboard Options
 - Dashboard Service

Office Manager

Unpaid Claims Management - B AetCigUhc Jan-May ALL (working...)

Drag a column header here to group by that column.

Payor	Service Date	Claim #	Patient	Provider	Chg Amt	Pmts/Adjs	Balance	Age	Note	F/U Date	Billing Date	Billing Media
-------	--------------	---------	---------	----------	---------	-----------	---------	-----	------	----------	--------------	---------------



Office Manager is used to create work queues for Operators (Users) so that each as their own work space.

Examples are:

Appt. Management – create a queue that gives a users a list of all No Show Appointments for a particular group of providers so they can send out letters, etc.

Pending Claims – create a queue that lists vouchers that failed validation and group by carrier.

Unpaid Claims – capture a payer's claim that are aged over a specific number of days

Thank you for joining us today, for additional assistance....

You can contact us through our website at www.galenhealthcare.com

