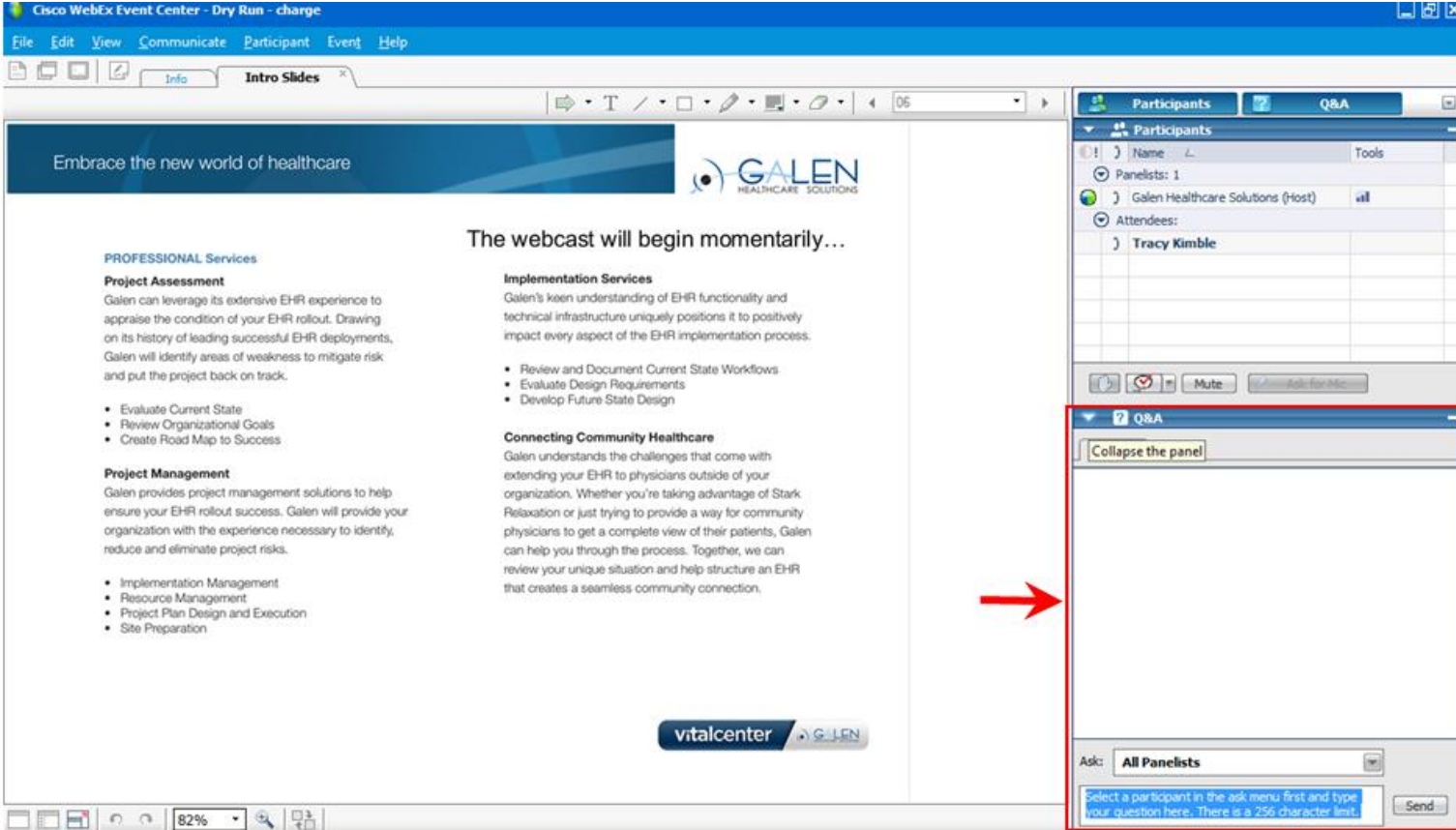


Your phone has been automatically muted. Please use the Q&A panel to ask questions during the presentation!



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

Embrace the new world of healthcare



Allscripts Practice Management – Patient Registration and Scheduling

January 16, 2015

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



vitalcenter



Presenter:

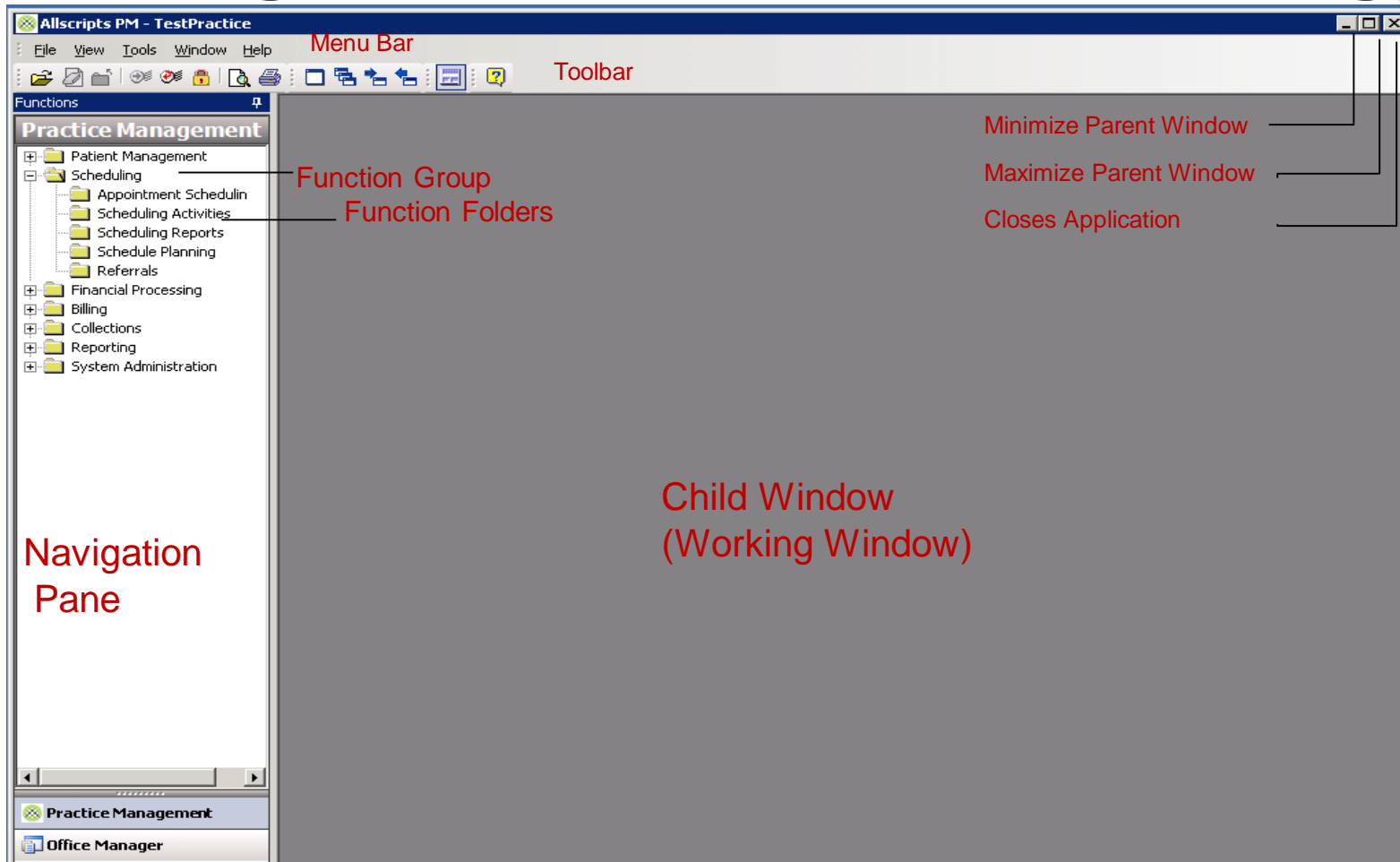
Kim Baxter -
Professional Services Consultant










What we will learn today:

- Patient Registration
 - Explanation fields
- Review remaining tabs and their purpose:
 - Document Management
 - Service Inquiry
 - Automatic Registration
 - And Allscripts PM Today
- Schedule a patient
 - explanation fields
 - “right click” options
- Review remaining tabs and their purpose:
 - Scheduling Activities
 - Scheduling Reports
 - Schedule Planning
 - Referrals

Navigation/Common Terminology



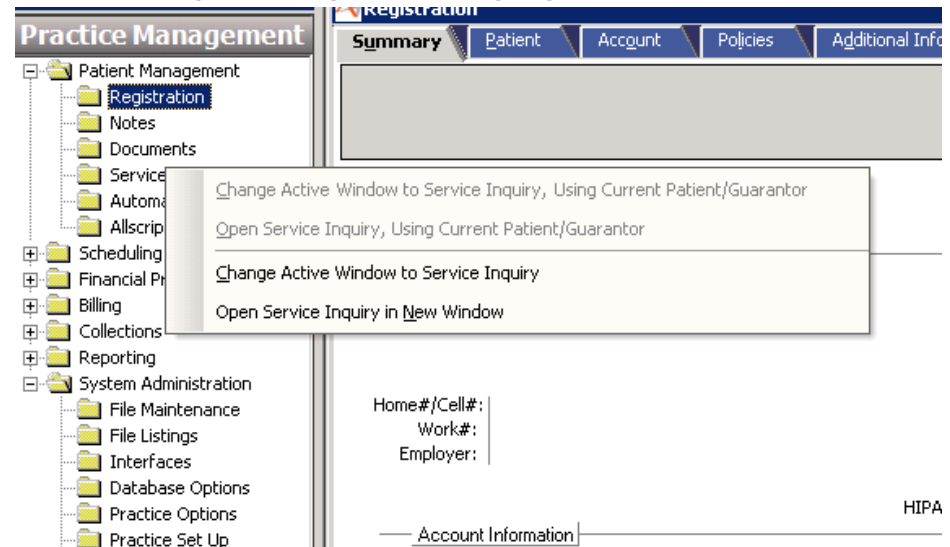
Icons

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

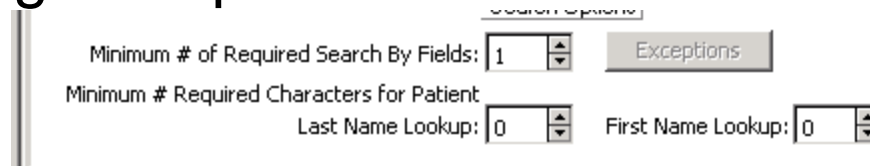
- F9 - Keeps current window open
- Right click the navigation pane for opening, closing and bringing other windows to the front.



- Use the navigation icons in the toolbar.

Practice Options –

Require more than one search by fields
when searching for a patient



The screenshot shows a 'Search Options' dialog box with the following settings:

- Minimum # of Required Search By Fields: 1
- Minimum # Required Characters for Patient: (blank)
- Last Name Lookup: 0
- First Name Lookup: 0
- An 'Exceptions' button is visible next to the first dropdown.

Practice Options –

Under the registration tab you can make specific fields required. You can also Highlight the required fields so the staff know they will not be able to save a registration without entering into that field.

Functions

Practice Management

- [-] Patient Management
- [-] Scheduling
 - Appointment Scheduling
 - Scheduling Activities
 - Scheduling Reports
 - Schedule Planning
 - Referrals
- [-] Financial Processing
- [-] Billing
- [-] Collections
- [-] Reporting
- [-] System Administration
 - File Maintenance
 - File Listings
 - Export Utilities
 - Interfaces
 - Database Options
 - Practice Options**
 - Practice Set Up
 - Job Status
 - Job Scheduling Manager
 - Dashboard Options

Practice Options

General | **Registration** | Charge Entry | Payment Entry | Statement | Reporting | Scheduling | R

Entry Options

- ☒ Assign Patient Numbers
- ☐ Assign Med. Rec. No
- ☐ Enter Med. Rec. Loc
- ☐ Enter Med. Rec. No
- ☒ Prevent Duplicate Med. Rec. No
- ☐ Use Sliding Fee Scales
- ☐ IAS Search
- ☐ Track Patient Changes
- ☒ Check Reg Related Claim Style Validations
- ☐ Suppress Warning for Missing Patient SSN

Duplicate Patient Checking

- ☐ Patient# Only
- ☐ Patient#/SSN# Only
- ☒ Full Patient Checking

Required Fields

Patient Registration Required Fields

☐ Highlight Required Fields

Field Description	Required	Skip
Patient SSN	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Patient Last Name	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Patient First Name	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Patient MI	<input type="checkbox"/>	<input type="checkbox"/>
Patient Suffix	<input type="checkbox"/>	<input type="checkbox"/>
Patient Address 1	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Patient Address 2	<input type="checkbox"/>	<input type="checkbox"/>
Patient City	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Patient State	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Patient Zip Code	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Patient Country	<input type="checkbox"/>	<input type="checkbox"/>
Patient Home Phone	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Patient Home Phone Ext	<input type="checkbox"/>	<input type="checkbox"/>
Patient Work Phone	<input type="checkbox"/>	<input type="checkbox"/>
Patient Work Phone Ext	<input type="checkbox"/>	<input type="checkbox"/>

Practice Management

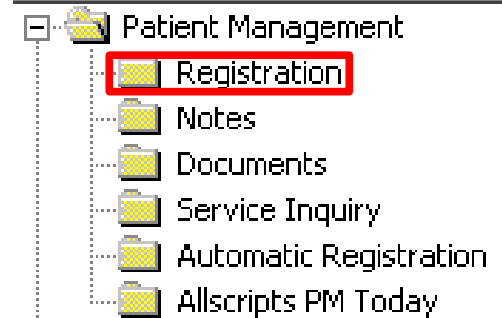
Office Manager

Identify the required fields in registration by checking the required box.

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

Home#/Cell#: (301) 123-1234 /
Work#:
Employer:
patient screen

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

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

This button will turn blue when you hover over it if it links to a secondary tab on the screen.

Summary
Patient
Account
Policies
Additional Info

DOB:
SSN:
Sex:
Age:

Patient Information

Patient:

Patient#:
SSN:

Last Name:

First, MI:
Suffix:

Address 1:

Address 2:

City:
State:

Zip Code:
Country:

Home Tel#:
Ext:

Work Tel#:
Ext:

Cell#:

Sex:

Birth Date:

Employer:

E:
Patient Information:

Enterpr:
Patient:

Usual Prov:

Referring Dr:

PCP:

Med. Rec. Loc:

Med. Rec. No:

Marital:

Employment:

Student:

Inactivation Date:

HIPAA Stmt Exp:


Rel to Guar:

Transplant Donor




Transplant Recipient


Comments:

This screen gives you the basic demographic information about the patient. The patient's SSN is automatically hyphenated if the option **Hide SSN** is selected on the **General** tab in **Practice Options** or **Organization Options**.

You can click on this  on and the entire SS# will appear temporarily.

— Patient Information —

Patient:   

Account Build 

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

☐ Search for an Existing Account

☒ **Build a New Account**

☒ Patient is Guarantor

Completing the Account tab for the first time

When you are adding a new patient and you click the Account tab for the first time, Account Build opens.

lists 2 options:

- *Search for an Existing Account

- *Build a New Account




DOB: Sex:
SSN: Age:

This tab is where you set up the patient contacts and designate a guarantor and subscriber. If you do not have a contact identified as the subscriber on this screen (even if it is the patient) the Policies tab will not be activated. So you must complete this page first before going to the policies tab.

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:

SSN:

Sex:

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:

List all policy information for patient.

Can have more than one primary policy. Therefore it is very important to complete as much information as possible for each Coverage.

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	

Can create new additional information as needed per your organization. However, important fields here are Race, Ethnicity and HIPAA which are required for MU.

Practice Management

Functions

- Patient Management
 - Registration
 - Notes**
 - Documents
 - Service Inquiry
 - Automatic Registration
 - Allscripts PM Today
- Scheduling
- Financial Processing
- Billing
- Collections
- Reporting
- System Administration

Notes - Note Management

Note Management

Patient: Justin Allscripts

Address: 70 Federal Street
7th Floor
Boston, MA 02110

☒ Patient Notes
 ☒ Collection Notes
 ☒ Other Acct Notes
☒ Claim Notes
 ☒ Service Notes
 ☒ Voucher Notes
☒ HIPAA Notes

Home Tel#: (617) 379-0841
Work Tel#:

Date/Time	Type	Subject	Operator	Expires
04/23/14 11:57:59 am	Patient	Patient Note	csi	
04/23/14 11:57:30 am	HIPAA 2	HIPAA Note	csi	

Patient specific - allows you to add, update, remove, organize, etc. notes on a patient account

Filter by specific Note types.

Canned notes can be created under File Maintenance>Note Type Maintenance

Note Type: Patient Note Expiration Date:

Subject: Patient Note

Patient needs to complete new HIPAA form. |

Practice Management

Save Cancel

Documents

Patient Specific
List of documents
that have been
sent or are
scheduled to be
sent.

Documents - Document Management

Document Management Patient Documents

Patient: Justin Allscripts

Address: 70 Federal Street
7th Floor
Boston, MA 02110

Home Tel#: (617) 379-0841
Work Tel#:

Document Data Type

- ☒ Patient Documents
- ☒ Collection Documents
- ☒ Recall Documents
- ☒ Outgoing Referral Documents
- ☒ Prescription Documents
- ☒ Scheduling Documents

Date/Time	Document Name	Data Type	Operator	Other Info
-----------	---------------	-----------	----------	------------

Documents - Patient Documents

Document Management Patient Documents

Document:

Field Name

- Appointment Reminder Letter
- Avery 5160 Mailing Labels
- Cholesterol Results
- Immunization Form
- Lab Results Request
- New Patient Letter
- Oversight Letter
- Patient Phone Message

Appointment Dates - From: To:

Select Account Types: All Account Types

Select Employers: All Employers

Select Med Rec Locations: All Medical Record Locations

Select Patients: All Patients

Select Prim Care Phys: All Primary Care Physicians

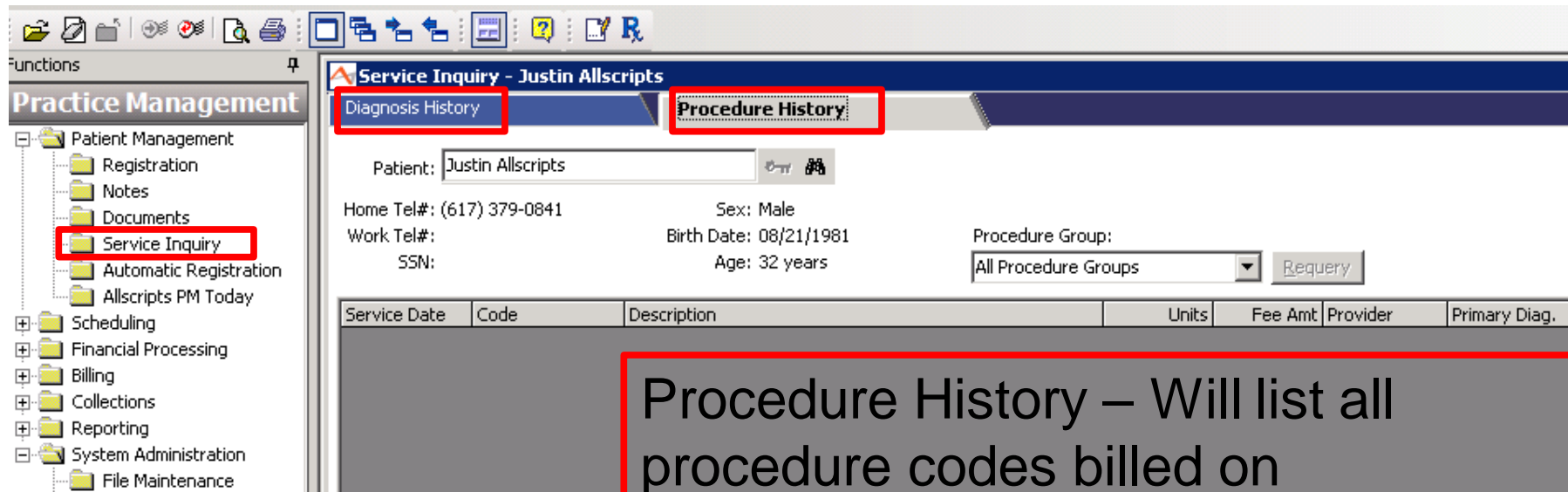
Select Referring Doctors: All Referring Doctors

Select Usual Providers: All Usual Providers

Print Preview

Non-Patient Specific
Batch jobs just as new
patient documents,
reminders, etc.

Service Inquiry



Practice Management

- Patient Management
 - Registration
 - Notes
 - Documents
 - Service Inquiry**
 - Automatic Registration
 - Allscripts PM Today
- Scheduling
- Financial Processing
- Billing
- Collections
- Reporting
- System Administration
- File Maintenance

Service Inquiry - Justin Allscripts

Diagnosis History **Procedure History**

Patient: Justin Allscripts

Home Tel#: (617) 379-0841 Sex: Male
Work Tel#: Birth Date: 08/21/1981
SSN: Age: 32 years

Procedure Group: All Procedure Groups

Service Date	Code	Description	Units	Fee Amt	Provider	Primary Diag.
--------------	------	-------------	-------	---------	----------	---------------

Diagnosis History –
Will list all diagnosis
billed on
this patient.

Procedure History – Will list all
procedure codes billed on
this patient. When a code is
highlighted on the list, double click to
view or print charges and payments
associated with code.

Automatic Registration

Allows for an interface that sends demographic patient information to the PM system. Before it is accepted into the system someone will have to accept the imports. The first tab is the import patient tab and kicks off the process. You define the Format you are wanting to run. (Maybe you have an interface with Hospital Registration and a patient portal.) You will have two separate formats. Until you select the format and exchange date information, the options are greyed out at the bottom of the screen.

Clear test data – self explanatory

Validate – Once you have reviewed changes, registered your new patients, and if chosen removed test data then you validate the import.

Register New – Allows you to review only new patient information before accepting it into your system.

Review Changes – Allows you to review changes to existing patients before accepting it into your system.

Automatic Registration

The screenshot displays the 'Automatic Registration' software interface. On the left, a 'Practice Management' tree view has 'Automatic Registration' highlighted with a red box. The main window, titled 'Automatic Registration - Import Patient List', has 'Import Patient List' selected in its menu bar, also highlighted with a red box. Below the menu, the 'Information Broker Format' is set to 'Test Patient Import'. There are three radio buttons: 'By Exchange Date', 'All Exchange Dates', and 'Discarded Only' (which is selected). A 'Run' button is visible to the right of the 'Discarded Only' option. In the foreground, a 'Print' dialog box is open. It contains fields for 'Job Server Name' (set to 'This Workstation') and 'Printer Name' (set to 'Microsoft XPS Document Writer (from BAXTERK) in session 1'). The 'Print Range' section has 'All' selected. The 'Copies' section shows 'Number of copies' set to 1 and 'Collate' checked. The 'Orientation' section has 'Portrait' selected. At the bottom of the 'Print' dialog are buttons for 'Print', 'Preview', 'Export', and 'Cancel'.

Same constraints as the previous window however this just generates a list of patients that are going to be queued for import.

Allscripts PM Today

Functions

Practice Management

- Patient Management
 - Registration
 - Notes
 - Documents
 - Service Inquiry
 - Automatic Registration
 - Allscripts PM Today**
- Scheduling
- Financial Processing
- Billing
- Collections
- Reporting
- System Administration

Allscripts PM Today

Practice Summary

Last Updated on:

Practice Name	Updated A/R	New Charges	New Payments	Today's Appts	%Boo
---------------	-------------	-------------	--------------	---------------	------

Aging

Last Updated on:

Payor	Category	Carrier	Current	31-60	61-90	91-120	Over 120	To
-------	----------	---------	---------	-------	-------	--------	----------	----

Claim Status

Last Updated on:

Claim Type	Paper Count	Paper Amount	Electronic Count	Electronic Amount	Total Count	Total Amo
------------	-------------	--------------	------------------	-------------------	-------------	-----------

E & M Codes

Last Updated on:

Provider	New Patients					Established Patients				
	99201	99202	99203	99204	99205	99211	99212	99213	99214	99215

Appointments

Last Updated on:

Category	Number	Percent
----------	--------	---------

Aging

Age by Billing Date

Last Updated on: 5/31/2006 4:54:24 PM

	Payor	Category	Carrier	Current	31-60	61-90	91-120	Over 120	Total
+	Self			\$10,240.52	\$1,167.00	\$0.00	\$240.00	\$10,855.20	\$22,502.72
+	Insurance			\$41,247.40	\$5,405.60	\$59,536.38	\$39,181.80	\$124,996.00	\$270,367.18
+	Collection			\$0.00	\$0.00	\$0.00	\$0.00	\$447.00	\$447.00

E & M Codes

Last Updated on: 5/31/2006 4:54:00 PM

Provider	New Patients					Established Patients					Total
	99201	99202	99203	99204	99205	99211	99212	99213	99214	99215	
+ Overall	0	0	0	0	0	2	20	21	2	1	46

This is a great tool if set up correctly. It is also called the digital dashboard. It is very easy to set up but a lot of people do not understand what they are actually looking at and misinterpret the data. There is a document called DigitalDashboard Allscript PM that explains the setup and the interpretation of the data in detail. The purpose of this tool is to get a snapshot of the following areas of your practice.

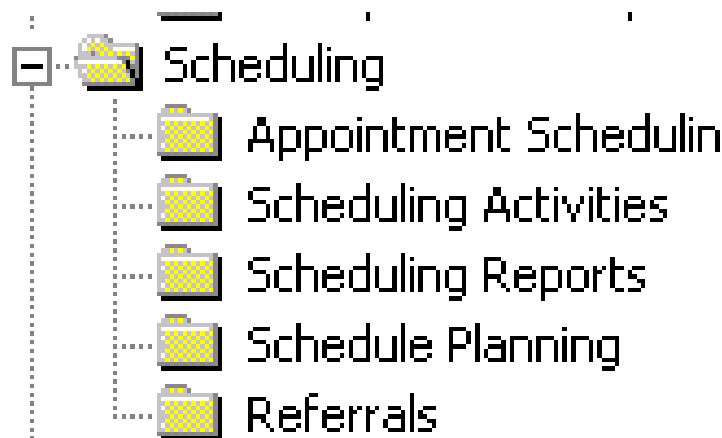
Practice Summary which shows you the Updated A/R, New Charges, New Payments, Today's Appts (# of booked appts.) and % Booked. (%Booked = Appointment time booked for the day / Total appointment available for the day)

Appointments breaks down the appointments for today into a graph and pie chart. IT shows the booked, Acknowledged, Encounters opened, Charged, No Shows, Cancelled and Bumped

Aging – people tend to complain about this section because it does not match the Aged Trial Balance Report. The difference here is the aging bracket definitions. In the ATB the set up by the user under Practice Options. The Aging brackets here are set values predefined by the system. You can see above there are + signs by the different payor types. You can expand a row and show more detail all the way down to Specific plan and claims pending.

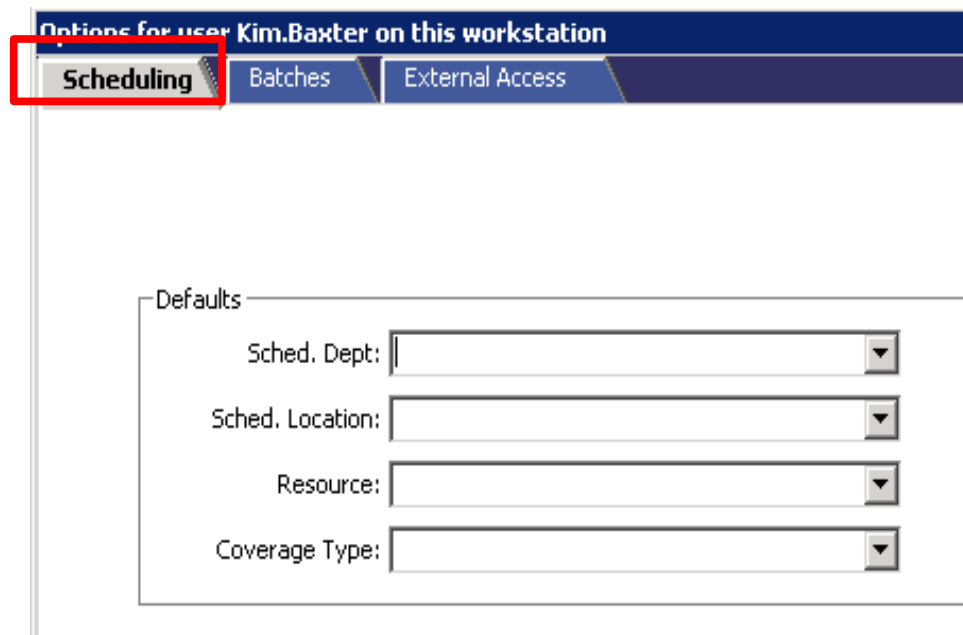
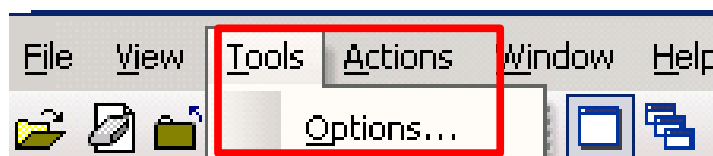
Scheduling

- **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



Tips and Tricks

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



Defaults can be for a Department, Site, or Particular Resource

Patient Banner

Patient Details

Branching Buttons

Appt. Filter Fields

Open Times Functions

- **Patient Banner**

- Date of Birth
- Sex
- SSN*
- Age

* The SSN can be hidden by selecting this option under Practice/Org Options, General Tab. Only the last four digits will then be displayed.

- **Patient Details**

- Patient Name *
- Address
- Patient/Enterprise #
- Home/Work #
- Employer
- DOB/Age
- # of active referrals
- # of missed/late appts
- Self Pay Balance
- Copay Amt
- MR Location/#

*A yellow or red flag by name and address indicates the patients account type has been flagged

- **Branching Buttons**

- Patient Information
- Referrals
- Recalls

When selected opens a new screen that allows perform or review a task without leaving the scheduling screen.

- **Future Appt Grid**

- A list of all future appointments.
To view a log of all appointments and their status click on the Appointment Activity Tab.

- **Appointment Filters**

- Coverage Type – Patients coverage type
- Ailment – Typically used for Work Comp or Accident coverage
- Schedule Dept
- Appt. Type/Duration
- Referring Doctor – The Dr. that is referring for this appointment only.
- Comments
- To the right Criteria options to use the Open Time functionality

- **Days and Times**

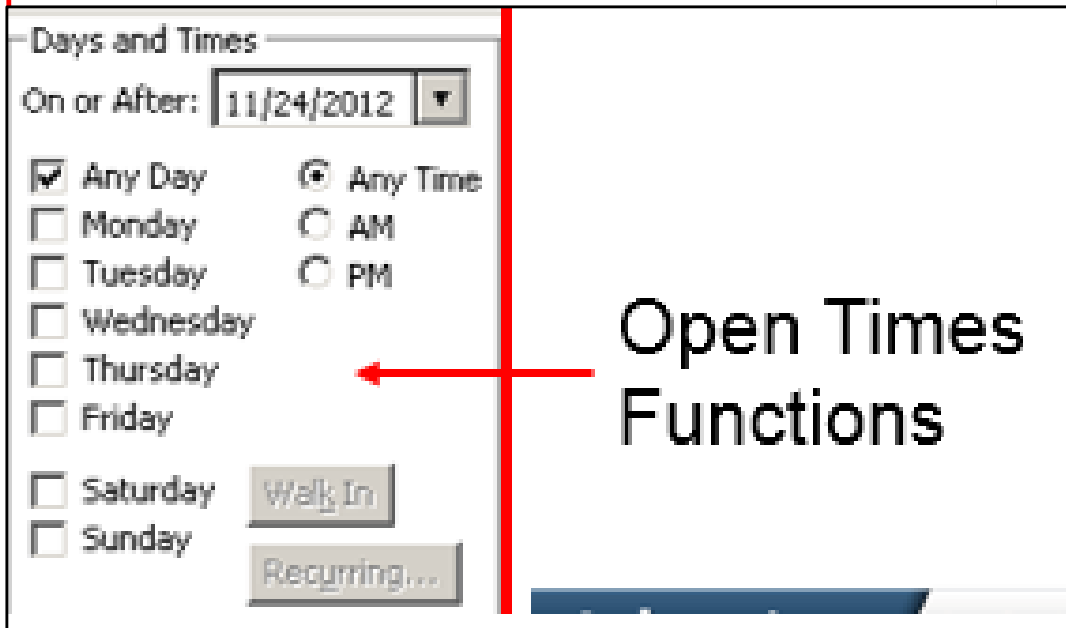
- Used with Open Times functionality
- On or After Date for a date range
- Selective days of the week
- AM/PM restrictions

- **Walk In Button**

- Enabled when the appropriate buttons are filled in.
- Will allow forcing in an appointment

- **Recurring Button**

- Enabled when you have Coverage Type and Appt. Type filled in.
- Allows scheduling patient for recurring appointments that meet the above criteria



Days and Times

On or After: 11/24/2012

☒ Any Day ☒ Any Time

☐ Monday ☐ AM

☐ Tuesday ☐ PM

☐ Wednesday

☐ Thursday

☐ Friday

☐ Saturday

☐ Sunday

Walk In

Recurring...

Open Times Functions



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

- **Link Appts** – Allows linking multiple appts for the same patient same day. Coverage type has to be entered.
- **Open Times** – Must have preferences defined in Appt. Filters. Will list available openings instead of having to scrol through book.
- **Use Book** – Takes you the appropriate appt. book
- **Cancel** – Cancels appt. in process of being booked.

Ailment Information

Ailment History for: Justin Allscripts

Ailment Type	Comment	Status
All Fields		

Coverage Type: **Medical**

Ailment: 

Selected Points:

- Ailment info is access by clicking the red + in the appointment Filter fields. This is mostly used when entering accident or workers compensation information.

- Can be made required by marking so in Practice/Org options, General Tab.

- Can impact Charge Entry and Import Charges.

Ailment Type: **Hospital Visits**

Ailment Comment: **Date Of Injury**

Field Name	Value	Req?
Workers Compensation		
Condition Related to Employment		
Condition Related to Accident		
State		
Comment		
Date 1st Symptom		
Old Symptoms?		
Date 1st Consulted		
Date Last Seen		
Emergency?		

Save **Cancel** **OK** **Help**

Appointment Book

Right click a line
for additional
options

Appointment Scheduling - Appointment Book

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

Sched. Dept: Medical Department
Sched. Location: Professional Clinic - Main Location
Resource: Dr Bones Date: 04/21/2014 Add Day Add W

15
Time
12 A
1 A
2 A
3 A
4 A
5 A
6 A
7 A
8 A
9 A
10 A
11 A
12 P
1 P
2 P
3 P
4 P
5 P
6 P
7 P
8 P
9 P

PC-Main Medical
Dr Bones
Mon 04/21/2014
Appts: 0

10:30 F/UP
10:45 F/UP
11:00 F/UP
11:15 F/UP
11:30 F/UP
11:45 F/UP
12:00 Lunch
12:15 Lunch
12:30 Lunch
12:45 Lunch
01:00 Acute
01:15 Acute
01:30 Acute
01:45 Acute
02:00 Acute
02:15 Acute
02:30 Acute
02:45 Break
03:00 OV
03:15 OV
03:30 OV
03:45 OV
04:00 OV

View Activity Restrictions
Schedule New Appt. (Any Patient)
Force Appointment
Walk In Appointment

Repeat

Schedule New Appointment

Patient: Patient#:
Enterprise#:
Self-Pay Balance:
Med. Rec. No:
Home Tel#:
Work Tel#:
Employer:
DOB/Age:
Referrals:
Missed Appts:
Late Appts:

Comment:

Patient Info...
Referrals...

Coverage Type: Medical
Appt Type:
Duration:
Refer. Doctor:
Comments:

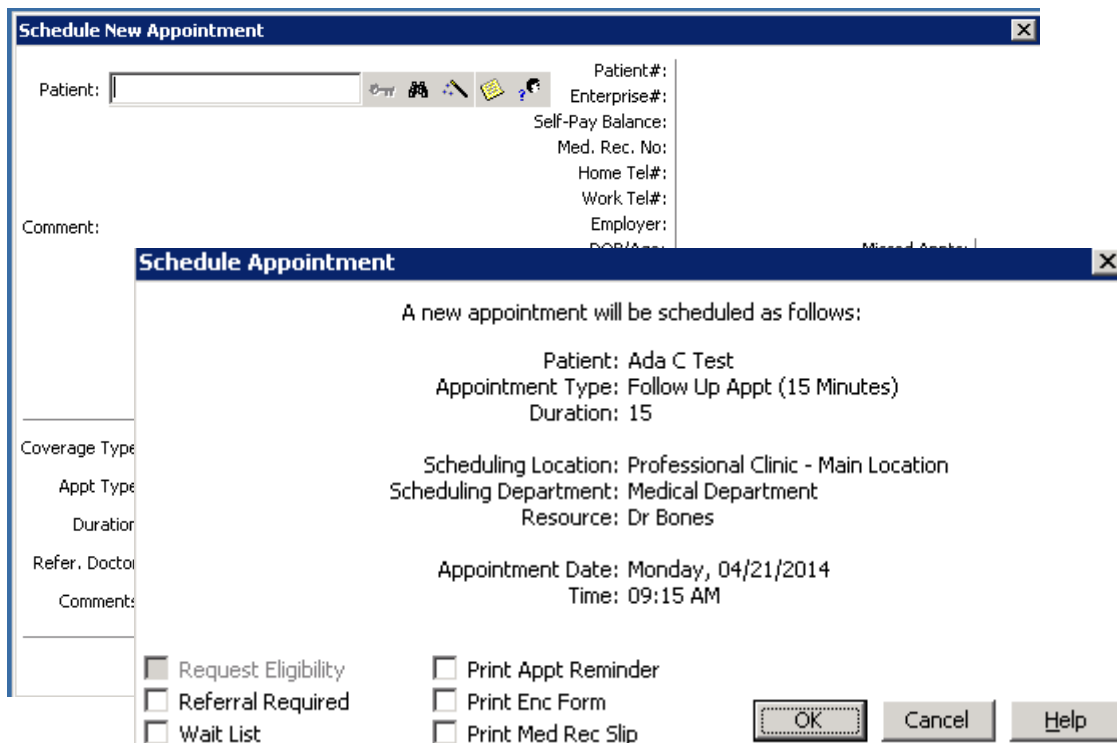
***** Appointment Information *****
Sched. Location: Professional Clinic - Main Location
Sched. Dept: Medical Department
Resource: Dr Bones
Date/Time: 04/21/2014 1:15 pm

OK Cancel Help

Day Type: No
Activity: Acute
From: 01:00 PM To: 02:45 PM Usual Duration: 15
Elig: Acute, OV, OV - 5

Like looking at an appt. book.

Appt. Times with lines per time for adding appointments by double clicking a line to open the schedule appt. window.



Schedule New Appointment

Patient#: Patient#:
Enterprise#: Enterprise#:
Self-Pay Balance: Self-Pay Balance:
Med. Rec. No: Med. Rec. No:
Home Tel#: Home Tel#:
Work Tel#: Work Tel#:
Employer: Employer:
DOB/Ass: DOB/Ass:

Comment:

Schedule Appointment

A new appointment will be scheduled as follows:

Patient: Ada C Test
Appointment Type: Follow Up Appt (15 Minutes)
Duration: 15

Scheduling Location: Professional Clinic - Main Location
Scheduling Department: Medical Department
Resource: Dr Bones

Appointment Date: Monday, 04/21/2014
Time: 09:15 AM

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

OK Cancel Help

After completing the Schedule New Appt. fields you will be given a screen for schedule appt.

Options are:

Referral Required

Wait List (If you are putting pt. on a waitlist)

Print Appt. Reminder

Print an Encounter Form

Print Med. Record Slip (not used much these days)

Appointment Management

Appointment Scheduling - Appointment Management

Stored Job: [] Store...

Sched. Dept: [Medical Department]

Sched. Location: [Professional Clinic - Main Location]

Resource: [Dr Bones]

Appointment Status:

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

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

☐ Bumped Appt List

☐ Wait List

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

At a glance view by

- Dept./Location and/or
- Resource
- by Date/ Date Range
- Appt. Status
- Bumped List or Wait List.

Right
Click
Options

Access by double-clicking an individual appt. line or using the right click option.

Request Eligibility if one has not been previously requested.

Encounter Form – Print or reprint an encounter form on demand
Med Rec Slip – print an on demand medical record slip
Appt. Remind – print an on demand reminder
Move Appt. – Lets you move an appointment if you need to.
Patient Info. – Take you to the patient details window
Ok, Cancel and Help

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
		Work Tel#:	
		Employer:	
		Birth Date:	05/25/1920 Age: 93 years
Comment:			

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:	
Sched Dept:	Medical Department	Started:	
Resource:	Dr Bones	Check Out:	
Appt Type:	Follow Up Appt (15 Minutes)	Cancel Reason:	
Duration:	15	Coverage Type:	Medical
Encounter:	Not printed Encounter# 953330	Referring Dr:	
Med Rec Slip:	Not printed	Referrals...	No Referral
Booked By:	csi on 04/21/2014 04:53 PM	<input type="checkbox"/> Referral Required	Coverage:
Confirmed By:			
Ack. By:			
Cancelled By:			

Request Eligibility...

Comments: bp follow up

[Enc. Form](#)
[Med. Rec. Slip](#)
[Appt. Remind](#)
[Move Appt](#)
[Patient Info...](#)
[Register](#)
[OK](#)
[Cancel](#)
[Help](#)

Takes you to the referral work queue. (Next slide)

Incoming Referrals [X]

Incoming Referrals for:

Refer. Date	Insurance Policy	Referral From	Refer To	Diagnosis	Status
-------------	------------------	---------------	----------	-----------	--------

Policy: [Dropdown]
Referral From: [Text] [Icon]
Date Referred: 06/10/2008 [Dropdown]
Referred To: [Dropdown]
Authorization#: [Text]
Pre-Certification#: [Text]
Diagnoses: [Text] [Icon] [Icon]
Procedures: [Text] [Icon] [Icon]
Expiration Date: [Dropdown]
Authorized Visits: [Text] [Icon] [Icon] ☐ Docum. Required

Referral Statistics

Authorized Visits:	0
Charged Visits:	0
Uncharged Visits:	0
Future Visits:	0
Visits Remaining:	0

First Appointment:
Date Last Voucher:

Status: ☒ Active ☐ Complete ☐ No Show

Notes: [Text Area]

☐ Attach to Appointment ☐ Link (do not count visit) [Save] [Cancel] [OK] [Help]

Referral Work Queue

- Lists all incoming referrals
- Highlight line to populate lower information.
- Also can add notes on referrals
- Add Attachments
- Link to existing appt.

Practice Management

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

Patient Scheduling

Appointment Book

Appointment Management

Appointment Activity

Patient:

Appointment Status

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

R	C	Date	Day	Time	Location	Department	Resource	Appt Type	Dur	Status
		02/17/2014	Mon	09:00 AM	PC-Main	Medical	Dr Bones	ACUTE-NP	15	Sched
		02/17/2014	Mon	03:30 PM	PC-Main	Medical	Dr Bones	Consult1	15	Sched
		04/21/2014	Mon	01:45 PM	PC-Main	Medical	Dr Bones	AC-1	15	Sched

Right Click Options –

Register - is only available when the appt. slot selected is scheduled for potential patient (phone registration)

Reschedule Bumped Appt. - only available when selecting an appt. in list that has been bumped.

Request Eligibility – only available when an eligibility has not been done in a previous 24 hour period.

Appointment Detail

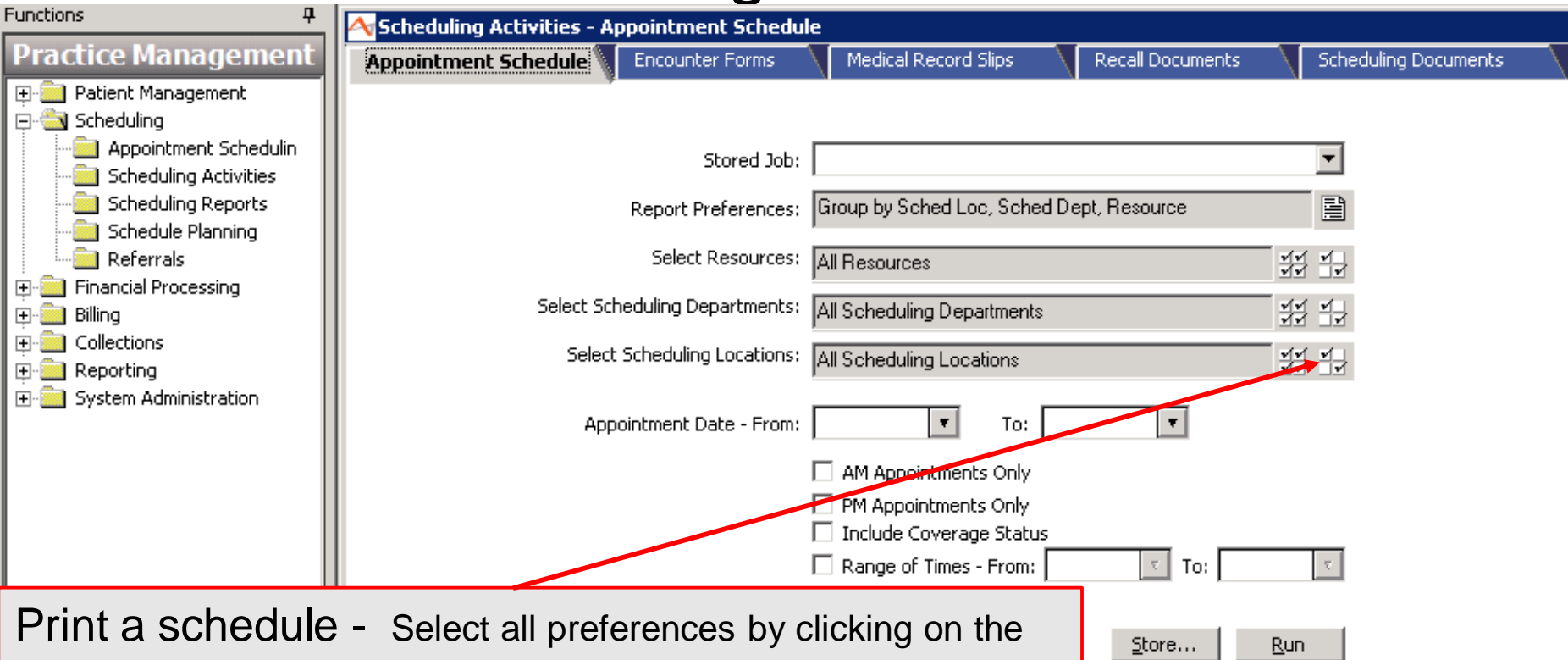
- Patient Information
- Register
- Incoming Referrals
- Schedule New Appt (This Patient)
- Recalls
- Confirm
- Acknowledge
- Wait List
- Started
- Check Out
- Cancel
- No Show
- Move Appointment
- Bump Appointment
- Reschedule Bumped Appointment
- Encounter Form
- Med Rec Request
- Med Rec Slip
- Appointment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

Patient Specific

list of past or future appointments.

Can filter on Appt. Status.

Scheduling Activities



Functions

Practice Management

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

Scheduling Activities - Appointment Schedule

Appointment Schedule: Encounter Forms Medical Record Slips Recall Documents Scheduling Documents

Stored Job: []

Report Preferences: Group by Sched Loc, Sched Dept, Resource []

Select Resources: All Resources [] [] []

Select Scheduling Departments: All Scheduling Departments [] [] []

Select Scheduling Locations: All Scheduling Locations [] [] []

Appointment Date - From: [] To: []

☐ AM Appointments Only

☐ PM Appointments Only

☐ Include Coverage Status

☐ Range of Times - From: [] To: []

[Store...] [Run]

Print a schedule - Select all preferences by clicking on the icon.

- Select date/date range
- AM/PM (leave unchecked for both)
- Include Coverage Status (optional)
- Select Times (optional)
- You can store setting for future reports
- Run to spool and print report

- * Run batch job for printing encounter forms
- Can also restart (incase of an error) at a particular encounter #
- Other Filters
- Grouping preferences and level of detail options

Scheduling Activities - Encounter Forms

Appointment Schedule | **Encounter Forms** | Medical Record Slips | Recall Documents | Sched

Run Type:
☒ New Forms
☐ Restart After Encounter#:

Report Preferences: **No Group Fields**

Select Appointment Types: All Appointment Types

Select Resources: All Resources

Select Scheduling Departments: All Scheduling Departments

Select Scheduling Locations: All Scheduling Locations

Appointment Date - From: To:

☐ AM Appointments Only
☐ PM Appointments Only
☐ Range of Times - From: To:

Selections **Run**

Report Preferences

Available Group Fields:
Appointment Type
Resource
Scheduling Department
Scheduling Location

Level of Detail:
☒ Encounter Forms
 Appointments

Available Sort Fields:
Appointment Date/Time
Patient Name

☐ New Page per Major Sequence
☐ View with Drill-Down

OK Cancel Help

Individual encounter forms will need to be printed from the schedule.

Scheduling Activities - Recall Documents

Appointment Schedule

Encounter Forms

Medical Record Slips

Recall Documents

Scheduling Documents

Select Patients: All Patients ☐ ☐

Select Recall Types: All Recall Types ☐ ☐

Select Resources: All Resources ☐ ☐

Recall Date - From: To:

Print

Preview

Report Preferences

Available Group Fields:

Level of Detail:

☒ Appointment Schedule
☐ Scheduling Location
☐ Scheduling Department
☐ Resource
 Appointments

Can select a
Level of Detail.

Available Sort Fields:

(none available for this report)

☐ New Page per Major Sequence

☐ View with Drill-Down

OK

Cancel

Help

- Can be used for all appointment related reminders as well as healthcare related reminders. However, with most offices using EMR's. Those are handled within the EMR system.
- Documents are built in File Maintenance > Document File Maintenance>Patient Documents.

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Scheduling Activities - Scheduling Documents

Appointment Schedule | Encounter Forms | Medical Record Slips | Recall Documents | **Scheduling Documents**

Document:

Select Appointment Statuses: Default Appointment Statuses ☐ ☐

Select Appointment Types: All Appointment Types ☐ ☐

Select Patients: All Patients ☐ ☐

Select Resources: All Resources ☐ ☐

Select Scheduling Departments: All Scheduling Departments ☐ ☐

Select Scheduling Locations: All Scheduling Locations ☐ ☐

Appointment Date - From: To:

Date Booked - From: To:

☐ AM Appointments Only
☐ PM Appointments Only

Potential Patients: Exclude Potential Patients

Sort Documents By: Appointment Date & Time

Batch printing
appointment related
documents
Setup of documents is
done in Document File
Maintenance and
Scheduling or Patient
Document types. Once
document is created then
it will be listed in the
Document Drop down
window as shown here.

Document:

Appointment Statuses: Appointment Reminder Card

Appointment Types: Appointment Reminder Letter

Select Patients: Avery 5160 Mailing Labels

Select Resources: Cholesterol Results

Immunization Form

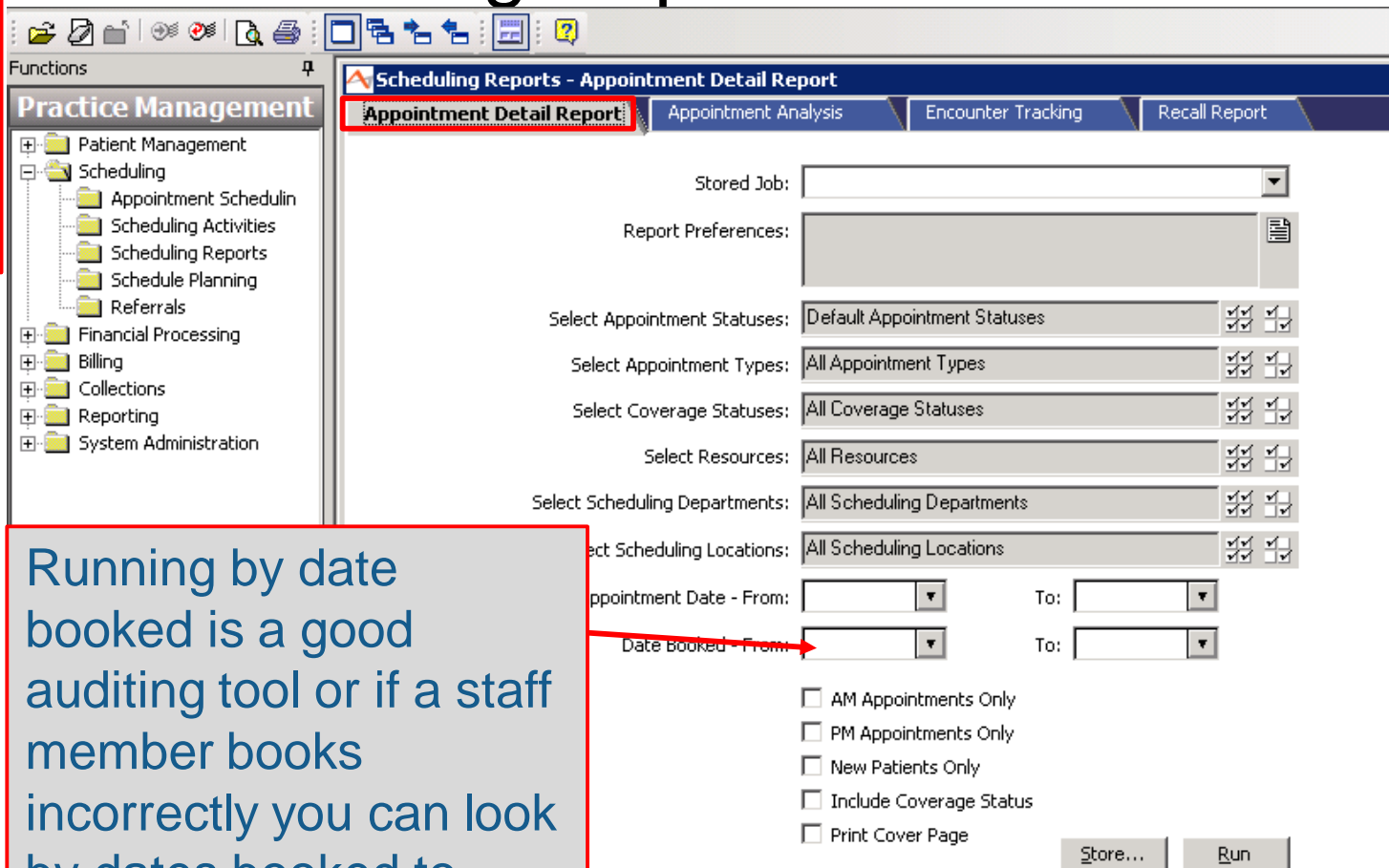
Lab Results Request

New Patient Letter

Oversight Letter

Scheduling Reports

This report will allow you a list of appts. By date or date booked.



Functions

Practice Management

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

Scheduling Reports - Appointment Detail Report

Appointment Detail Report | Appointment Analysis | Encounter Tracking | Recall Report

Stored Job:

Report Preferences:

Select Appointment Statuses: Default Appointment Statuses ☐ ☐

Select Appointment Types: All Appointment Types ☐ ☐

Select Coverage Statuses: All Coverage Statuses ☐ ☐

Select Resources: All Resources ☐ ☐

Select Scheduling Departments: All Scheduling Departments ☐ ☐

Select Scheduling Locations: All Scheduling Locations ☐ ☐

Appointment Date - From: To:

Date Booked - From: To:

☐ AM Appointments Only

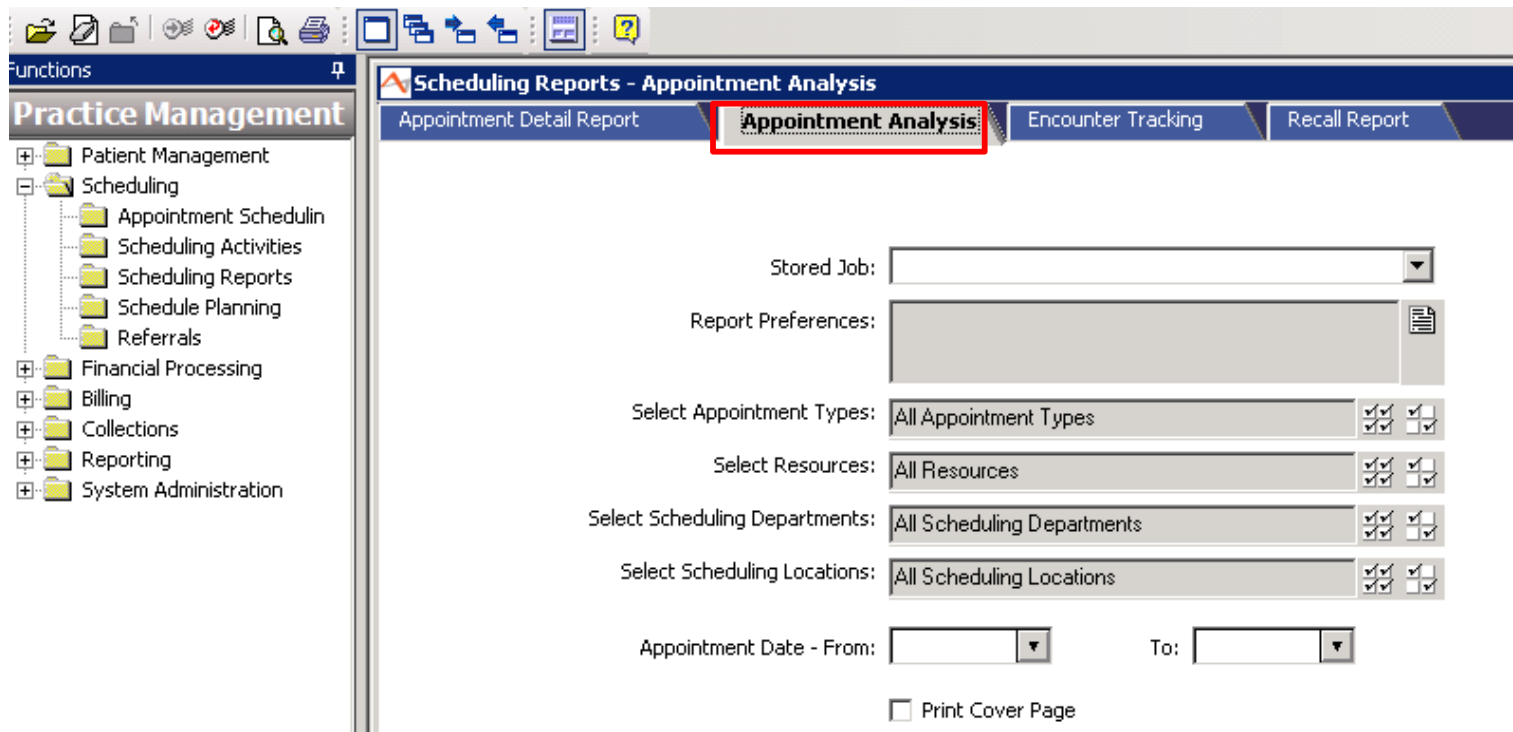
☐ PM Appointments Only

☐ New Patients Only

☐ Include Coverage Status

☐ Print Cover Page

Running by date booked is a good auditing tool or if a staff member books incorrectly you can look by dates booked to narrow down a list of the errors made.



This report is good to run for the following:

- Count of appointments by status within a selected date range
- Count of the number of blocked hours within the specific date range
- Count of the contact hours within the specific date range
Utilization percent by Resource (provider or service area)

BEST PRACTICE REPORT

- Should be ran DAILY!
- Gives you a list of all scheduled appointments that have an assigned encounter number and the status of the encounter.
- It details the Appt. Date and Time, Patient # and Name, Scheduling location, Scheduled department, the Resource, Appointment Type, Duration, Encounter Number and Status.
- This is report is excellent for tracking missing charges.

Scheduling Reports - Encounter Tracking

Appointment Detail Report

Appointment Analysis

Encounter Tracking

Recall Report

Stored Job:

Report Preferences:

Select Resources: ☒ ☒

Select Scheduling Departments: ☒ ☒

Select Scheduling Locations: ☒ ☒

Appointment Date - From: To:

☐ Print Cover Page

Store...

Run

4/23/2014 3:23:16PM

Encounter Tracking Report

Professional Clinic

Page:

Appt Date & Time	Sched Loc	Sched Dept	Resource	Appt Type Comments	Duration	Encounter No.	Status
4/21/14 9:15 am	PC-Main	Medical	Bones	F/UP 15 bp follow up	15	953330	Scheduled
Patient: 5027310 Ada C Test No vouchers exist for this service date							
4/21/14 1:45 pm	PC-Main	Medical	Bones	AC-1 sore throat	15	953340	Scheduled
Patient: 5027380 Justin Allscripts No vouchers exist for this service date							

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Scheduling Reports - Recall Report

Appointment Detail Report | Appointment Analysis | Encounter Tracking | **Recall Report**

Stored Job:

Report Preferences:

Select Recall Types: All Recall Types ☐ ☐

Select Resources: All Resources ☐ ☐

Recall Date - From: To:

Recall Option: All Recalls

☐ Print Cover Page

Select Recall Types

Recall Types

☒ All Recall Types

Abbreviation	Description
EGD	EGD
LAB	LAB
PAP	PAP
PE	PHYSICAL EXAM
U/S	ULTRASOUND

4/23/2014 3:40:24PM

Recall Report
Professional Clinic

Page: 1

Recall Date	Patient No & Name	Home Phone Number Work Phone Number	Recall Type Comments	Resource	Linked Appt ?
-------------	-------------------	--	-------------------------	----------	------------------

- Gives you a list of patients that have a recall entered on their account.
- Can select all or filter to specific types.
- The sample report shows the headers of Recall Date, Patient # and name, Phone numbers, Recall Type Comments, Resource and is the appointment linked (Y or N).

Schedule Planning

Schedule Planning - Block Time by Calendar

Block Time by Calendar | Block Time by Criteria

Sched. Dept:

Sched. Location:

Resource:

April					2014	
Sun	Mon	Tue	Wed	Thu	Fri	Sat
		1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30			

04/22/14

Two ways to block (open appointment slots) for a resource.

- By Calendar
- By Criteria

Block Time by Calendar

- **Provider schedules are made up of Day Types that are created to meet the criteria set forth by the providers office. Users will use Day Types to Block a provider's schedule. Blocking a schedule in this case is opening up times for the provider to be available for appointments.**
- **Go to Schedule Planning using one of the following methods:**
 - F9, type SCP, then press Enter.
 - Double-click Scheduling > click Schedule Planning
- **At Sched. Dept accept the default or click the drop down then select a Scheduling Department.**
- **At Sched. Location accept the default or click the drop down then select a Scheduling Location.**
- **At Resource accept the default or click the drop down then select a Resource. Once all three fields are filled, the Query button is enabled.**
- **Click Query. This activates the screen.**
- **Accept the current month or move to another month or year.**
- **Point and click on each day of a given month that are to be blocked using the same Day Type.**
- **Click Block, then click the drop down to open the list of Day Types.**
 - Click on the name of a Day Type to select it.
 - Click OK. The days you selected now appear in white with the abbreviation of the Day Type to identify how the days will be blocked.
 - Repeat steps 7 and 8 until you have selected all the days in the month to be blocked.
- **Click Save (Alt+s) to complete the process. Blocked days now display in green.**

Block Time by Criteria

- **Assign Day Types for days or group of days using a date range.**
Go to Schedule Planning using one of the following methods:
 - F9, type SCP, then press Enter.
 - Double-click Scheduling > click Schedule Planning
- **At Sched. Dept accept the default or click on the drop down button then select a Scheduling Department.**
- **At Sched. Location accept the default or click on the drop down button then select a Scheduling Location.**
- **At Resource accept the default or click on the drop down button then select a Resource.**
- **At Block From Date enter the date that you want to start blocking on.**
- **At Block Through Date enter the last date you want to block.**
- **At Selected Days of the Week check the box for one of the following:**
 - any combination of Monday, Tuesday, Wednesday, Thursday, Friday, Saturday, Sunday
 - All Days
 - Weekdays
- **The days you checked populate in the grid.**
- **At Day Type click on the drop down button to open the list. Then click to make a selection. Repeat this step for each day listed in the grid.**
- **Click Block. If scheduled appointments will be bumped as a result of this action, the Accept Re-Block window opens.**
- **Review the detail on the screen, then do one or both of the following:**
 - Check Keep Forced Appointments which may be Retained.
 - At Bumped Reason click on the drop down button to select a reason.
 - Click Cancel to cancel the blocking process.

Referrals

Functions

Practice Management

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

Referrals - Referral Exception Report

Referral Exception Report | Outgoing Referral Report | Outgoing Referral Documents

Stored Job:

Report Preferences:

Select Insurance Carriers: All Insurance Carriers

Select Providers: All Providers

Select Referral Option:

Select Exception Option: All Exceptions

Days Prior to Expiration: 0

4/5/2010 9:14:45AM

Referral Exception Report

Allscripts Practice

Incoming Referrals

Date of Referral	Authorization #	Referral Exp Date	Next Appt Date	Refer From Provider	Refer To Provider	Ins Carrier Abbrev	Primary Diagnosis	Auth Visits	Visits Left
Insurance Carrier: 2nd to MCR									
Referral Provider: Nylon, Nathan N									
Patient: 2070540 Betty B Brown 10/27/2008		11/27/2008		ddjj	ddjj	2AARP		999	998
Insurance Carrier: MCR Complete HMO									
Referral Provider: Celedon, Chuck C									
Patient: 1867740 Apple A Aqua 12/30/2008 0196169258		01/30/2009		bfah	deef	UHC20		999	997
Patient: 14840000 Betty B Brown 06/09/2008 0194885929		07/09/2008		deah	deah	UHC20		98	94

Page: 1

List of referrals

- With missing authorization numbers
- An expiration date that is near expiration
- Also identify incoming referrals with zero visits remaining.

List of outgoing referrals

- How many visits authorized
- Expiration Date
- Referred to provider/organization
- Referral type (consult, consult/treat, etc.)

4/5/2010 9:23:25AM

Outgoing Referral Report

Page: 1

Allscripts Practice

Date Referred - From: 01/12/2009 To: 01/16/2009

Date of Referral	Authorization #	Auth Visits	Referral Exp Date	In Net	Ins Carrier Abbrev	Refer From Provider	Refer To Provider	Specialty	Referral Organization	Ref Type	Primary Diag
------------------	-----------------	-------------	-------------------	--------	--------------------	---------------------	-------------------	-----------	-----------------------	----------	--------------

Referred From Provider: Brown, Bob B

Patient: 14041070 Brian B Brown
01/13/2009

99 01/13/2010 N UHC5

cjid

ffdb

SPECIAL

CONTRE

Ref Svc Type: DIAG&TX

Appt Date: 01/14/2009

Reason for Referral:

Docum Requested: N

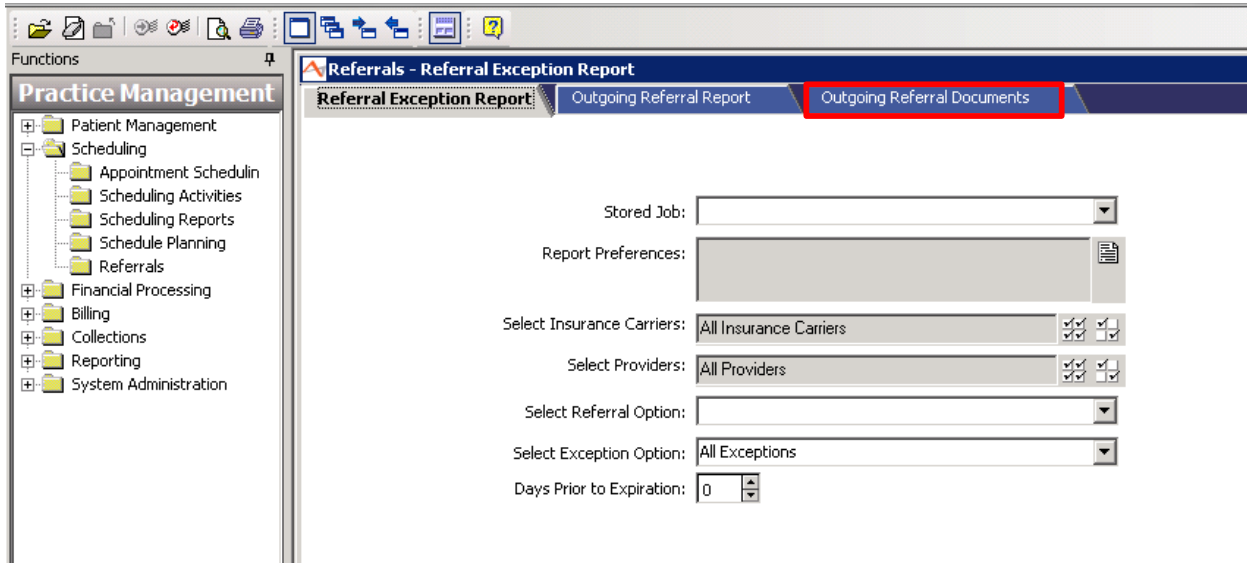
Appt Time: 09:45 AM

Procedure(s):

Status: Active

Booked By: Lisa Roper

Note: Dad informed of appt with dr. wagner 1/14/09



Functions

Practice Management

- Patient Management
- Scheduling
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- Reporting
- System Administration

Referrals - Referral Exception Report

Referral Exception Report | Outgoing Referral Report | **Outgoing Referral Documents**

Stored Job:

Report Preferences:

Select Insurance Carriers: All Insurance Carriers

Select Providers: All Providers

Select Referral Option:

Select Exception Option: All Exceptions

Days Prior to Expiration: 0

Used to print any referral related forms or documents.

Documents for this section are setup in File Maintenance>Document Maintenance

- Data Type: Referral Information

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

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

