

Practice Management Systems In The Private Sector

IHS 2009 National Partnership Conference

Reno, Nevada

Presented by:

Ron Sterling, Sterling Solutions

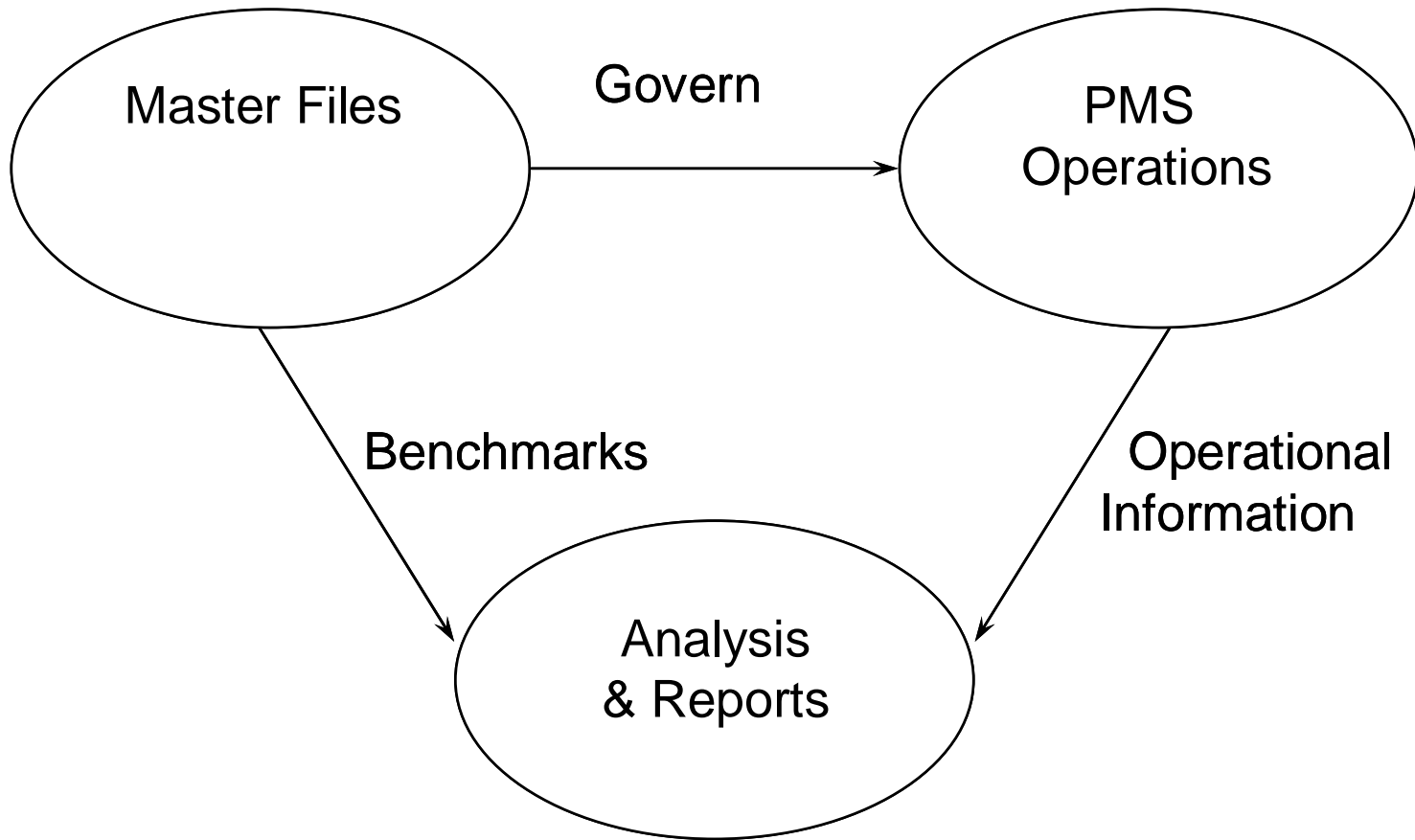
Michele Bond, Data Networks Corp.

Agenda

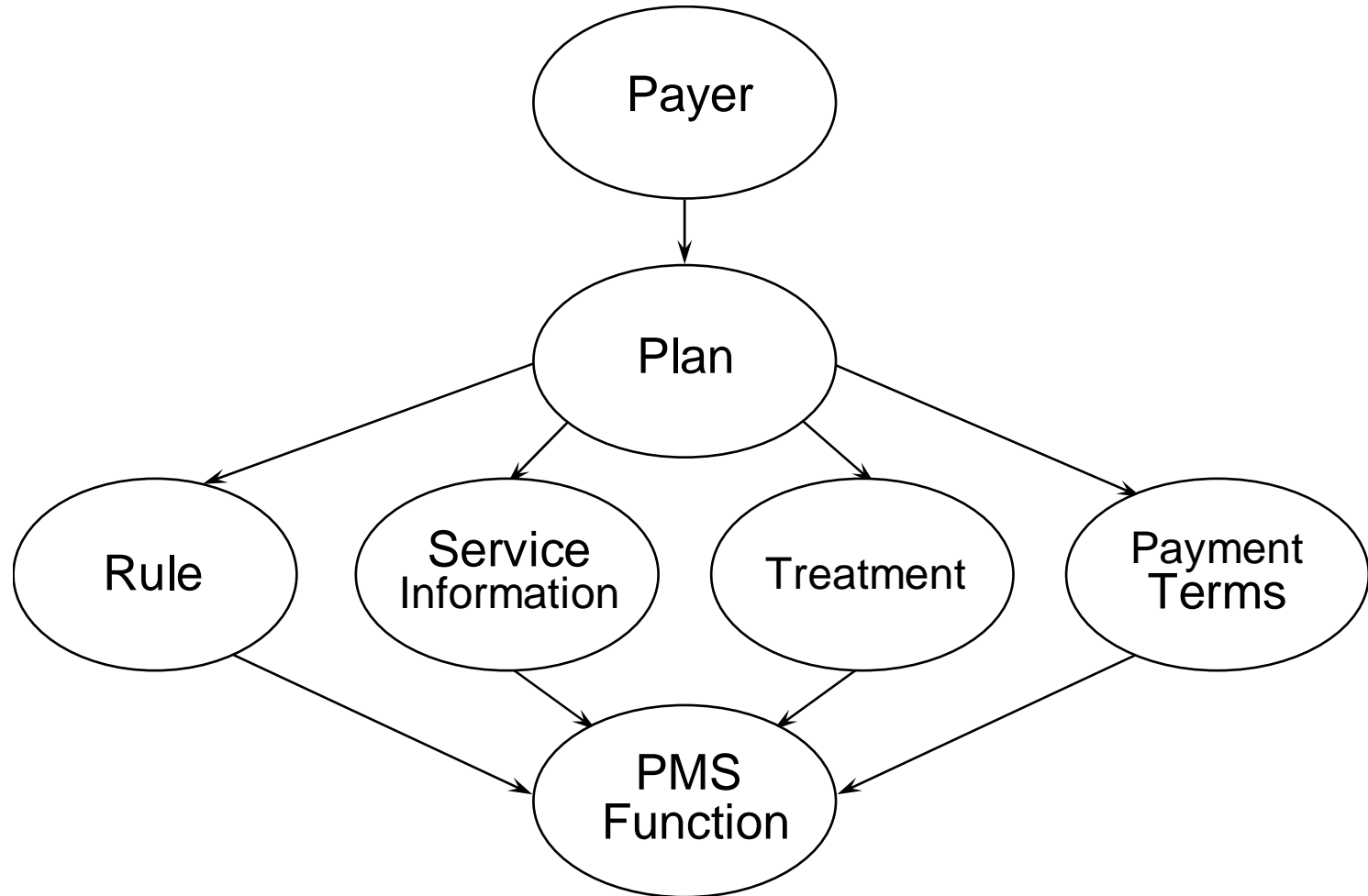
- PMS Overview
- Patient Registration
- Scheduling
- Third Party Billing
- Accounts Receivable
- Management and Operational Reporting
- Questions

PMS Overview

Overview of PMS Components



Payer Information Structure



Patient Registration

Paperless Support

- Unlimited Information Retention
- Patient Kiosk
- Print Patient Forms
- Supports Electronic Signature Pad

Patient Demographics

- Master Patient Index
- Supplemental Information
 - Patient Alerts
 - Multiple Contacts
 - Multiple Addresses
 - Defined Data

Patient Service

- Internet Portal
- Recalls
- Credit Card Processing

Insurance Information

- Multiple Insurance Information
 - Current
 - Historic
- Scanned
 - Card Image
 - Authorizations
- Eligibility Results

Sample Eligibility Screen

Marble - Citrix Presentation Server Client

IDN Hide VTB Tools Print Help Lock Logoff

Patient Services:

Patient Services: **DZIAK, ALLISHA** MRN: 170906 Sex: F Hospital Bal: 1651.83 Noshows: 5
Scheduling Pre-Arrival Select Patient DOB: 12/21/1976 Age: 32 Years Physician Bal: 118.00 Primary Phys: WEINBERG MD, DONALD
Bed Management Patient Accountin SSN: XXX-XX-5674 Special Needs: CLAUSTROPHOBIC Language Spoken: ENGLISH Primary Ins: UNITED HEALTHCARE
Anesthesia
Pro Billing
Case Management
Medical Records
ETM Tasks
Managed Care
Management
Operations
eCommerce
Reporting
Tasks
Chart

Eligibility Results - Patient Demo/Insurance

Patient Information		Eligibility Results	
Name:	DZIAK, ALLISHA	<input type="checkbox"/>	DZIAK, ALLISHA
SSN:	223-11-5674	<input type="checkbox"/>	223-11-5674
DOB:	12/21/1976	<input type="checkbox"/>	
Address:	103 DION ST	<input type="checkbox"/>	103 DION ST
	HATTIESBURG, MS 39401	<input type="checkbox"/>	HATTIESBURG, MS <input type="checkbox"/> 39401
Payer:	UNITED HEALTHCARE	<input type="checkbox"/>	COMMERCIAL
Cert No.:	407914868-01	<input type="checkbox"/>	40791486801
Eff From:	03/01/2009	<input type="checkbox"/>	<input type="checkbox"/> To:
Ins Type:	WALMART	<input type="checkbox"/>	Preferred Provider Organization (PPO)
PCP:	WEINBERG MD, DONALD	<input type="checkbox"/>	
PCP Tel:		<input type="checkbox"/>	
Group No.:	4035060	<input type="checkbox"/>	4035060
Subscriber:	DZIAK, ALLISHA	<input type="checkbox"/>	DZIAK, ALLISHA
Rel to Sub:	SELF	<input type="checkbox"/>	

Status: Active Appt: 16731

Rev'd: 04/07/09 Outcome: Eligible Rec'd: 04/07/09 Svc:

Benefits Edit View Review Variance Page OK Cancel

User: bcioffi Site: Default SITE Done.

Supporting Structures

- Case Record
 - Shared Information
 - Connected to Appointments
 - Associated with Charges
- Manages Referrals
 - Tracks Details and Status
 - Tracks Usage/Commitments

Sample Referral Screen

Marble - Citrix Presentation Server Client

IDN Tools Print Help Lock Logoff

Patient Services
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DOB: 12/21/1976 Age: 32 Years Physician Bal: 118.00 Primary Phys: WEINBERG MD, DONALD
SSN: 223-11-5674 Special Needs: **CLAUSTROPHOBIC** Language Spoken: ENGLISH Primary Ins: UNITED HEALTHCARE

Select Patient ▼

Referral/Authorization Detail

Name: DZIAK, ALLISHA	Requirement: Preauthorization
Number(GE): 192	FSC: 290 Plan: C290
Type: Preauthorization	Insurance: UNITED HEALTHCARE
Status: APPROVED	Cert No: 223421233A01
	PCP: WEINBERG MD, DONALD

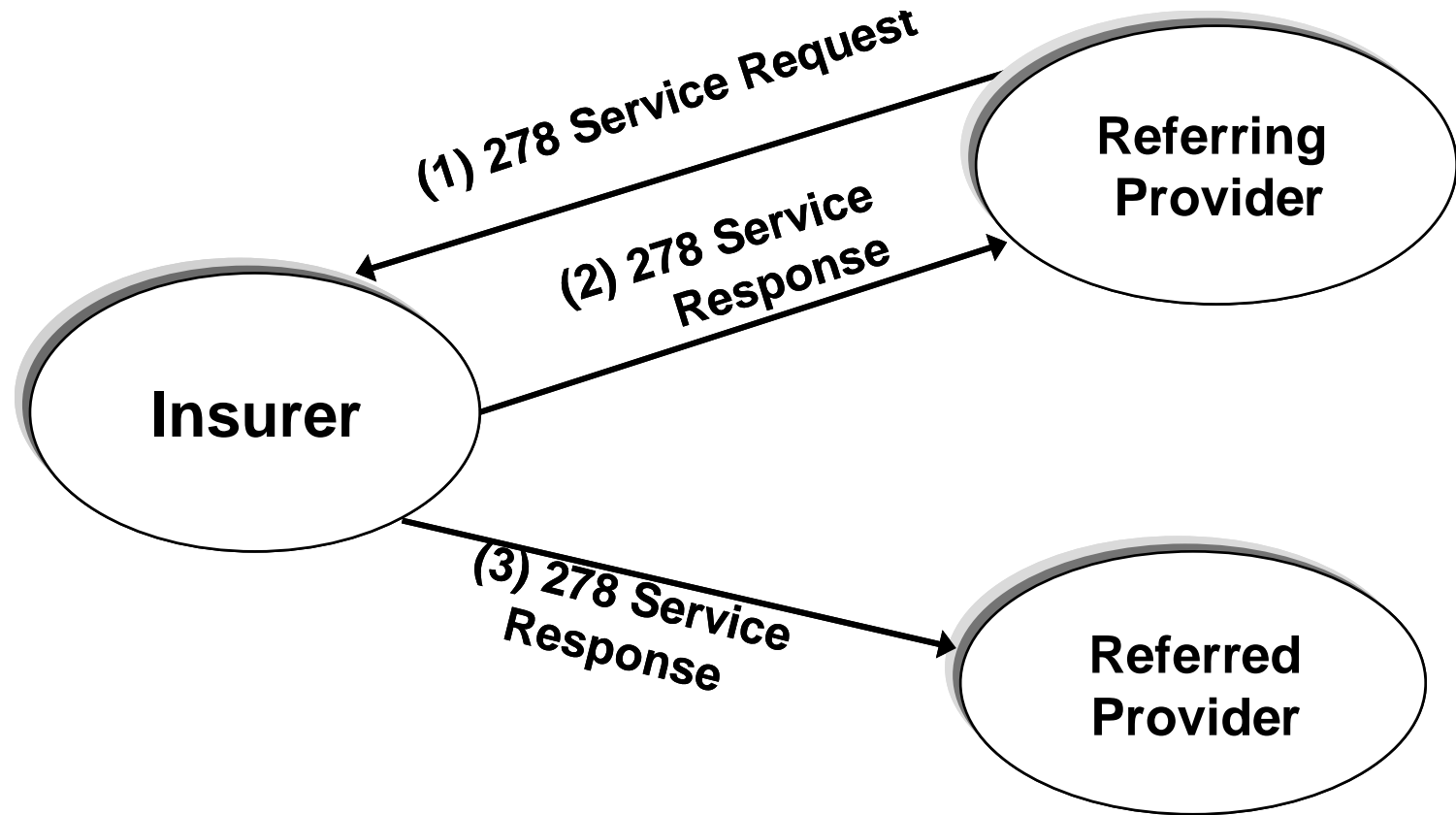
Ref Type: INPATIENT	Valid From: 04/05/2009 To: 04/06/2009
Ant. Proc: CARDIAC	Approval No: 22334112345
Body Part:	Treatments Auth:
Ant. CPT:	Days Authorized: 2
Service:	Payor Contact: CAROL JOHNSTON
Service Cat:	Phone No: 800-223-0934
Appt No:	Prov Phy: SHACKFORD MD, STEVEN
H or P Flag:	Add Notes:

Visit #: 1664	Sch Dt:	Adm Dt: 04/05/2009	Updated:
Vis Type: IP	Serv: SUR-GENERAL	Dis Dt: 04/06/2009	User:

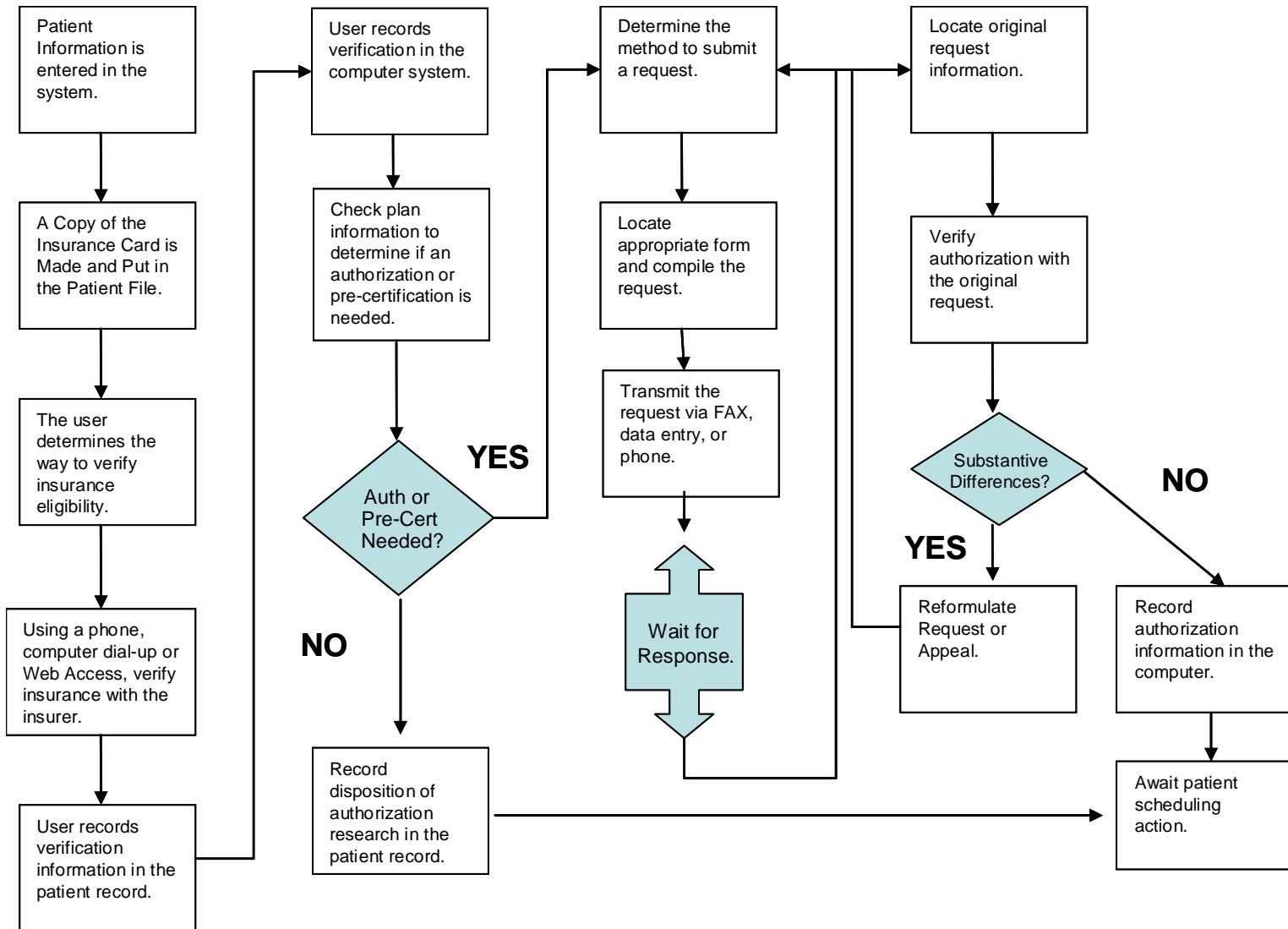
Actions... OK Cancel

User: bcoffi Site: Default SITE Done.

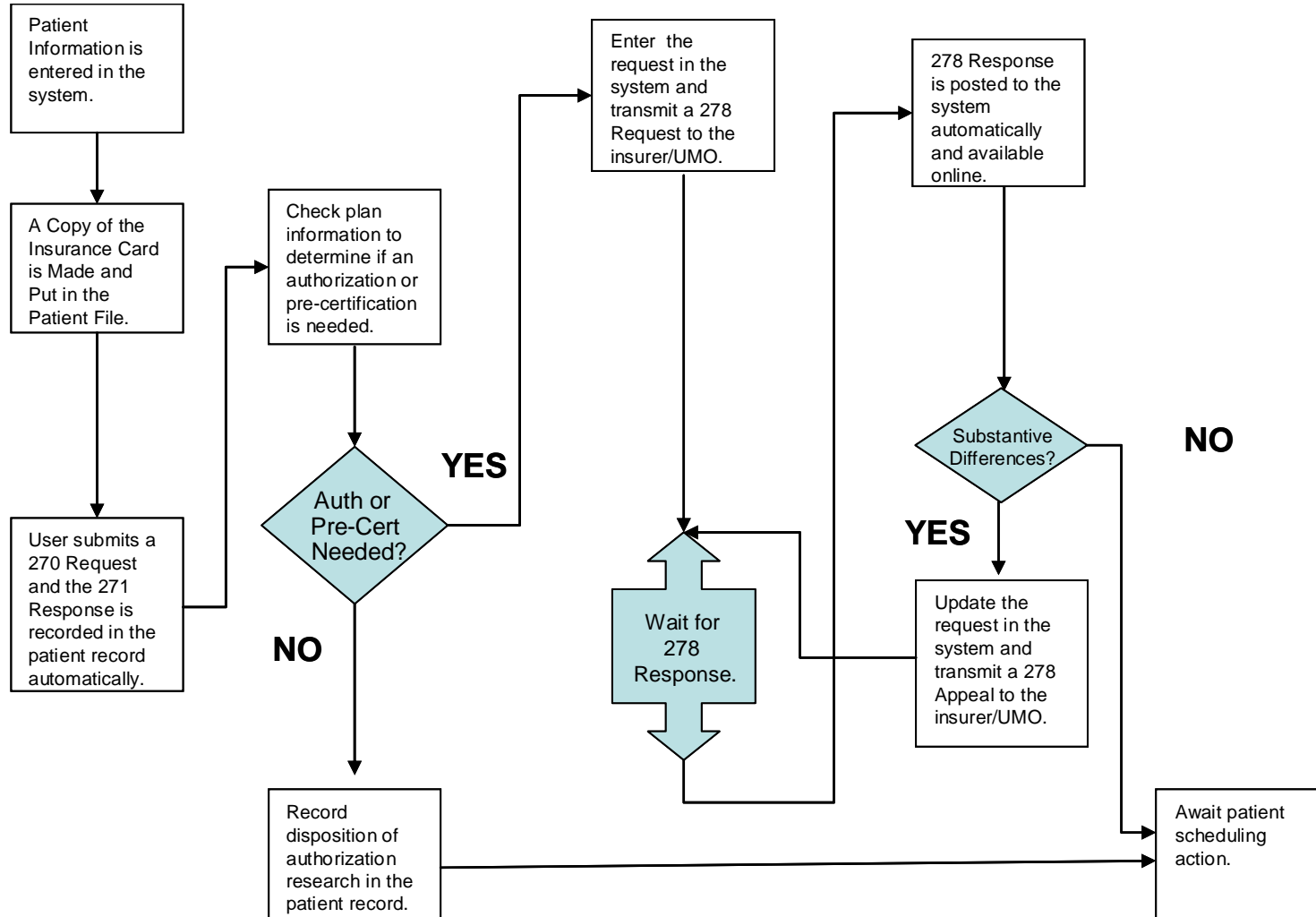
278 Service Request/Response Example



Example: Process Without 270/271 Eligibility and 278 Service Request



Example: Process With 270/271 Eligibility and 278 Service Request



HIPAA Privacy

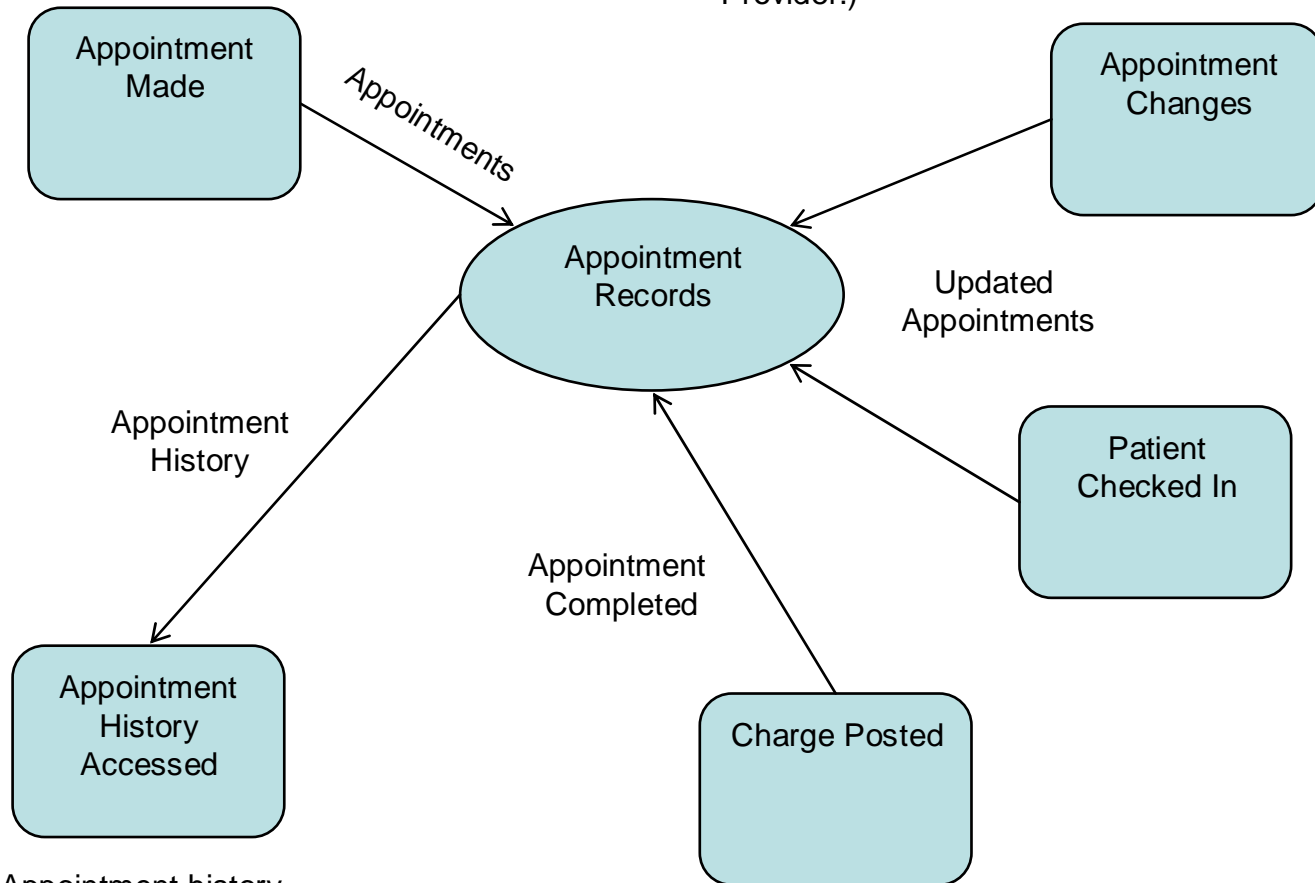
- HIPAA Consent/Acknowledge
 - Consent and Notice Date
 - Track Method and Effort
 - Track Restrictions and Revocation
 - Authorization Date and Scope

Scheduling

Private Sector PMS Appointments Life Cycle

Appointments can be associated with recalls and authorizations.

Appointment Changes can include type (reschedule, cancellations, short notice), and the reason (patient, office, Provider.)



Appointment history can be used to review patient reliability and consistency.

Appointment Scheduling

- Doctor, Unit, and Management Views
- Information includes instructions and notes
- Associated with cases and authorizations

Third Party Billing

Accommodates Payment Models

- Beneficiaries
- Fee for Service
- Global Rates
 - Case
 - Day of Service

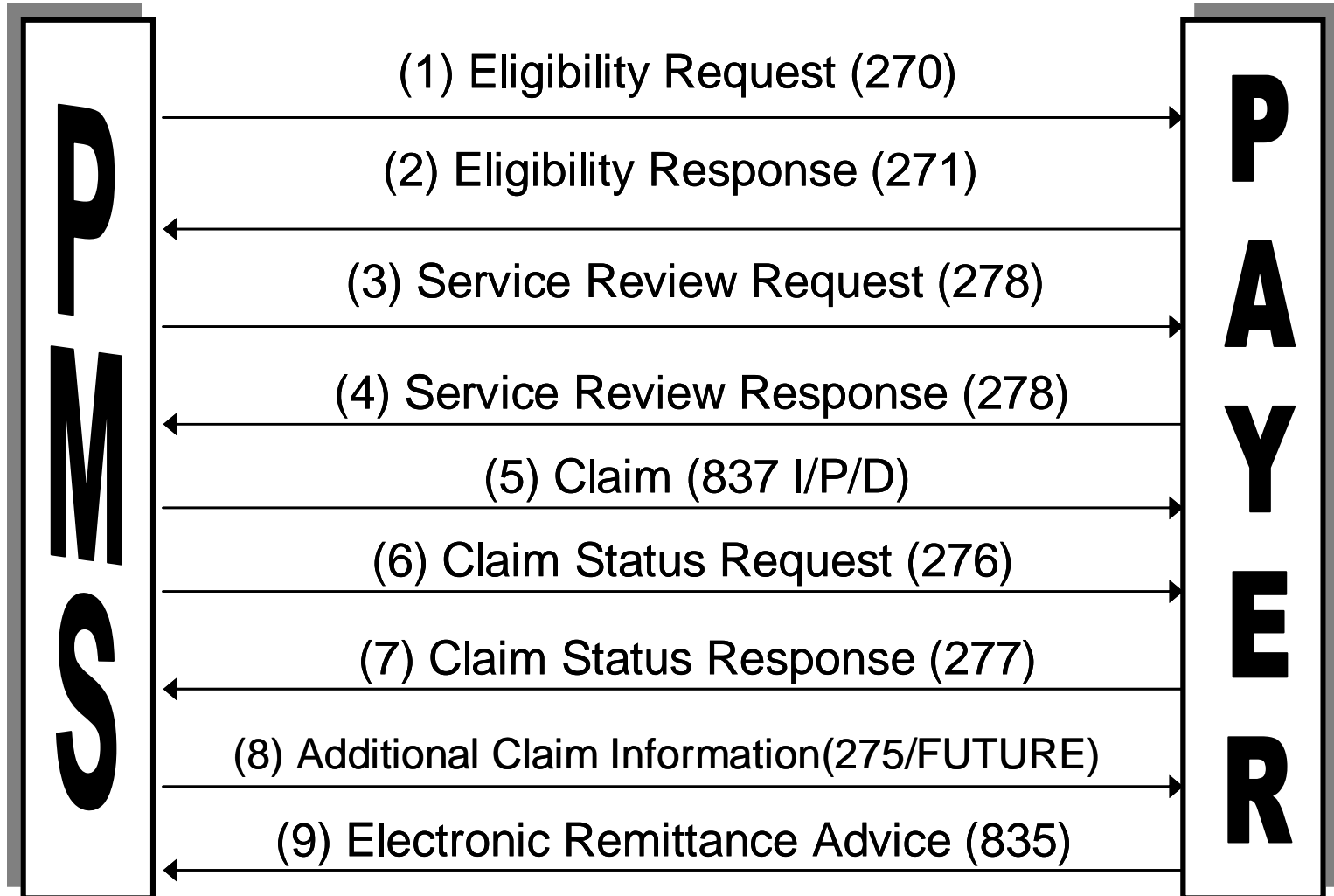
Billing Tools

- Claim Scrubbing
- COB Claim Support
- Denial Work list Screens

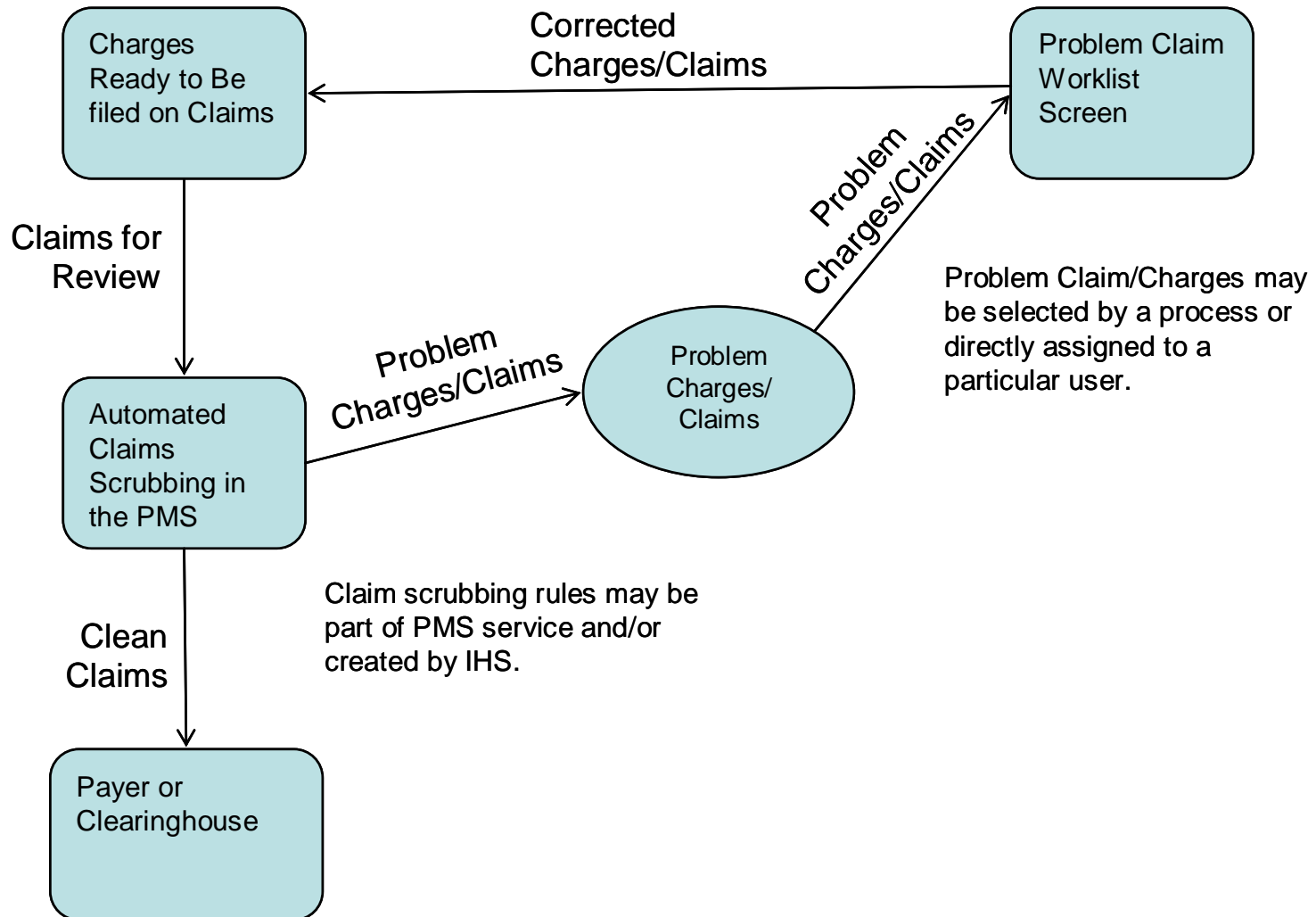
Avoiding Unpaid Services

- Electronic Verification of Eligibility
- Authorization Management
- Maintain History of Contacts and Collection Efforts
- Verifying Expected Payments

HIPAA Transaction Life Cycle



Private Sector PMS Claim Life Cycle



Compensation Management

- Line Item Posting
- Verifies Payment Amount with Expected Payment
- Facilitates Appeals

Sample Denial Screen

Marble - Citrix Presentation Server Client

IDN Hide VTB Tools Print Help Lock Logoff

Patient Account Patient Repts HB Alerts Worklist Patient Billing Transactions Mass Update Bed Manager System Setup Reports

Patient Services
Scheduling
Pre-Arrival
Bed Management
Patient Accountin

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 DOB: 12/21/1976 Age: 32 Years Physician Bal: 118.00 Primary Phys: WEINBERG MD, DONALD
 SSN: 223-11-5674 Special Needs: **CLAUSTROPHOBIC** Language Spoken: ENGLISH Primary Ins: UNITED HEALTHCARE

Select Patient

Activity Log

Visit: 1124 Scheduled: Program: *NA Balance: 497.61
 Type: OP Admit: 12/19/2007 Location: CEN Statement: 02/25/2008
 VIP/Conf: /N Discharge: 12/19/2007 Physician: Budget/Dun: Y / 1

FSC	Plan Code	Plan Description	FB Date	Mail Dt	Referral	Elig Rcv'd	Elig Status
280	C280	JOHN HANCOCK (BVC)	01/04/2008	01/05/2008		07/18/2007	Active
1	Z99	AUTO ASSIGNED SELF PAY					

Log Action Taken

Contact: [] Note Cat: [] Payor: []
 Reason: [] Name: [] ARCTR: 1H []
 Action: [] Phone: [] Claim Rcvd: []

Code Review Status Review

Review Date: 02/22/2008
 Review Code: DEN DENIAL POSTED
 Rep Note: [] Status End
 Result: []
 Review Date: []
 Review Code: []

Status Result

Rep: [] Date: [] Result: []
 Comment: []

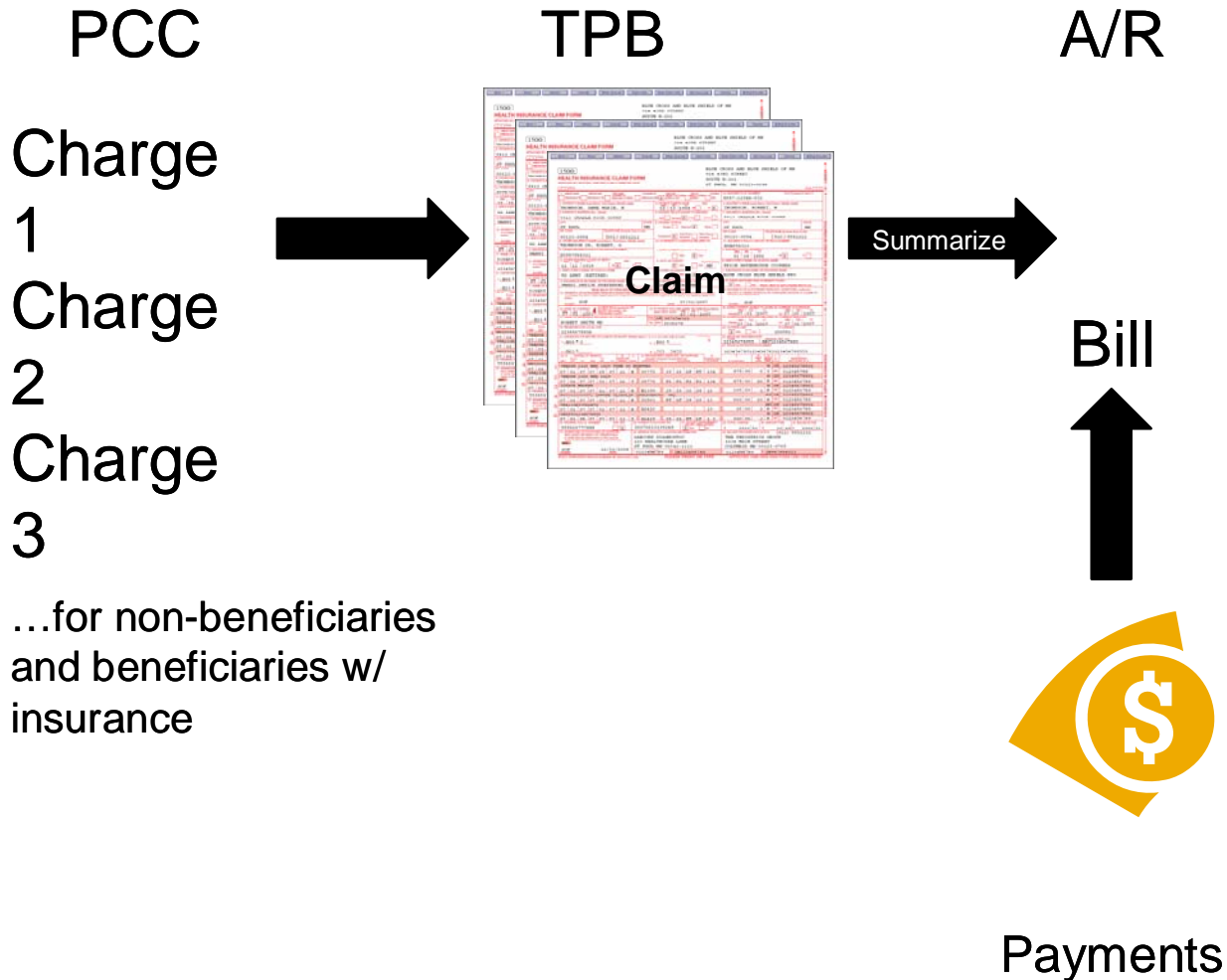
Comment [] OK Cancel

User: bcioffi Site: Default SITE Done.

Example

	E&M Service	Lab Test	Office Procedure
Charge	100	60	200
Expected Approved	70	40	200
Write-Off to Expected	(30)	(20)	0
Payer Payment	(49) 70%	(40) 100%	(160) 80%
Patient Portion	21	0	40

RPMS PMS “As Is”



PMS TPB and A/R

TPB

Charge Entry

Charge 1

Charge 2

Charge 3



...for non-beneficiaries and
beneficiaries with insurance.

A/R posts payment



Sample Payment Posting Screen

PBR.MKTP - Enter/Edit Distribution - PHYS (Test) - Justin L. McMartin


MacCartney, Jarvis STD , A Med Rec Num: LS000150
 LS0000000159 Ins Info: BC INS INFO 01/26/1967 42/M

Txn	Service Date Ticket Number	Procedure	Provider Location	Amount	H	Insurance Amt Due	Episode Amt Left
47	02/04/09 TLS000054755	99213	GENE LSS	100.00	n	BC 75.00	75.00
46	02/04/09 TLS000054755	83036	GENE LSS	89.00	n	BC 89.00	89.00

	Txn Num	Procedure	Amt Left	PBC	ABC	Xfr To
1	46	83036	14.00	50.00	25.00	SP
2	47	99213	25.00	50.00	0.00	SP
3						
4						

Reason Code	Amount	Date	Quantity
COPAY	25.00	04/13/09	1

Undistributed Amounts		0	0
Totals	39.00	100.00	25.00

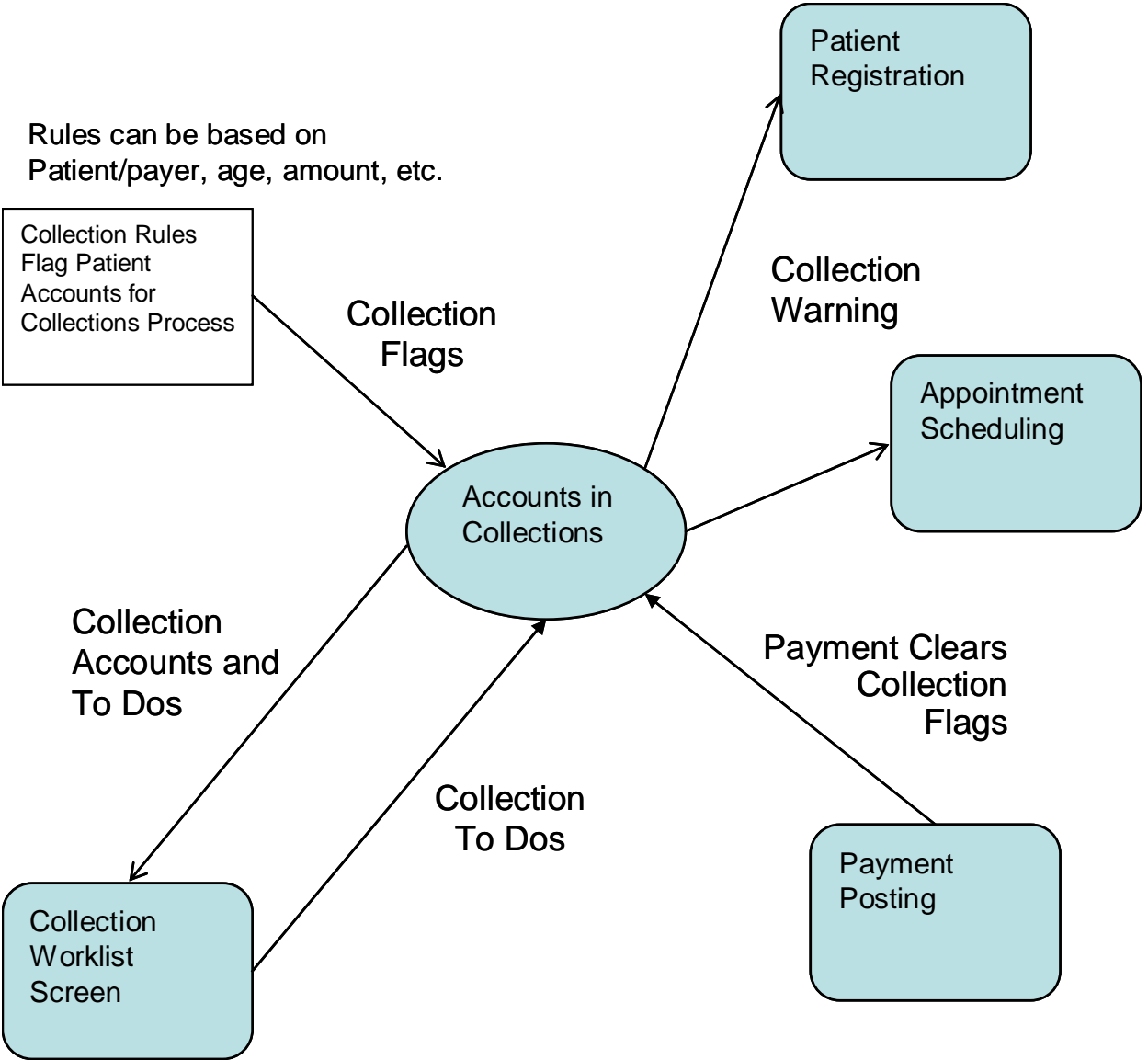


Accounts Receivable

Collection Tools

- Aging Options
- Online Claim and Statement Image
- Collection Work list Screens

Private Sector PMS Collections Life Cycle



Sample Collections Screen

PBR, MKTP - Collections Desktop - PHYS (Test) - Justin L. McMartin

Jackson, Karly STD, A Med Rec Num: LS000007
 LS0000000008 Ins Info: BC INS INFO 03/06/1978 31/F

Worklist: SELFPAY Compiled by: LSS.KFJ On: 04/07/09 08:58

0 of 17 Selected

✓	Amt remain	Pt name	Age	Worklist Bal	Process Dt/Time	Action	Note																																								
<input type="checkbox"/>	164.00	Jackson, Karl	180	164.00	04/07/09 09:21	IC																																									
<table border="1"> <thead> <tr> <th>Txn</th> <th>Svc Date</th> <th>Proc Code</th> <th>Provider</th> <th>Location</th> <th>Amount</th> <th>Amount Due</th> <th>Txn Ins</th> </tr> </thead> <tbody> <tr> <td>43</td> <td>11/27/07</td> <td>99211</td> <td>JACOB</td> <td>LSS</td> <td>35.00</td> <td>20.00</td> <td>SP</td> </tr> <tr> <td>99</td> <td>01/30/08</td> <td>99213</td> <td>JACOB</td> <td>LSS</td> <td>50.00</td> <td>20.00</td> <td>SP</td> </tr> <tr> <td>115</td> <td>07/01/08</td> <td>83036</td> <td>JACOB</td> <td>LSS</td> <td>89.00</td> <td>89.00</td> <td>BC</td> </tr> <tr> <td>116</td> <td>07/01/08</td> <td>99213</td> <td>JACOB</td> <td>LSS</td> <td>100.00</td> <td>20.00</td> <td>BC</td> </tr> </tbody> </table>								Txn	Svc Date	Proc Code	Provider	Location	Amount	Amount Due	Txn Ins	43	11/27/07	99211	JACOB	LSS	35.00	20.00	SP	99	01/30/08	99213	JACOB	LSS	50.00	20.00	SP	115	07/01/08	83036	JACOB	LSS	89.00	89.00	BC	116	07/01/08	99213	JACOB	LSS	100.00	20.00	BC
Txn	Svc Date	Proc Code	Provider	Location	Amount	Amount Due	Txn Ins																																								
43	11/27/07	99211	JACOB	LSS	35.00	20.00	SP																																								
99	01/30/08	99213	JACOB	LSS	50.00	20.00	SP																																								
115	07/01/08	83036	JACOB	LSS	89.00	89.00	BC																																								
116	07/01/08	99213	JACOB	LSS	100.00	20.00	BC																																								
<input type="checkbox"/>	126.00	MacCartney, J	180	126.00																																											
<input type="checkbox"/>	115.00	Williams, Ver	60	115.00																																											
<input type="checkbox"/>	99.00	West, Veronic	60	99.00																																											
<input type="checkbox"/>	87.70	Kingston, Kar	180	87.70	04/07/09 09:21	R																																									
<input type="checkbox"/>	77.00	Graham, Linds	60	77.00																																											
<input type="checkbox"/>	75.00	Williams, Sam	60	75.00																																											

Patient Name: JACKSON, KARLY
 Address: 1322 Excelsior Blvd, Eden Prairie MN, 55345
 Phone Number(s): (952)415-6589 (H)

Guarantor

Name	Relation	Address	Phone Number(s)
Jackson, Karly	SELF	1632 W 43 St, Rochester MN, 55247	(612)458-6532 (H)

First | Last Charge: 05/20/07 | 01/09/09 | Last Payment: 12/04/08

Worklist Balance: 164.00 | AR Balance: 321.00 | BD Balance:

0+	30+	60+	90+	120+	150+	180+	Total
100.00	149.00					72.00	321.00

Account Desktop

LSS
 integrated solutions
 for physical therapy
 A MEDITECH COMPANY

Display Stats Note Comment Reminder Letter Create Ind Claim Demand Bill View Txn Edit Txns

Management and Operational Reporting

Analysis Options

- List Price
- RVU
- Value
- Realization

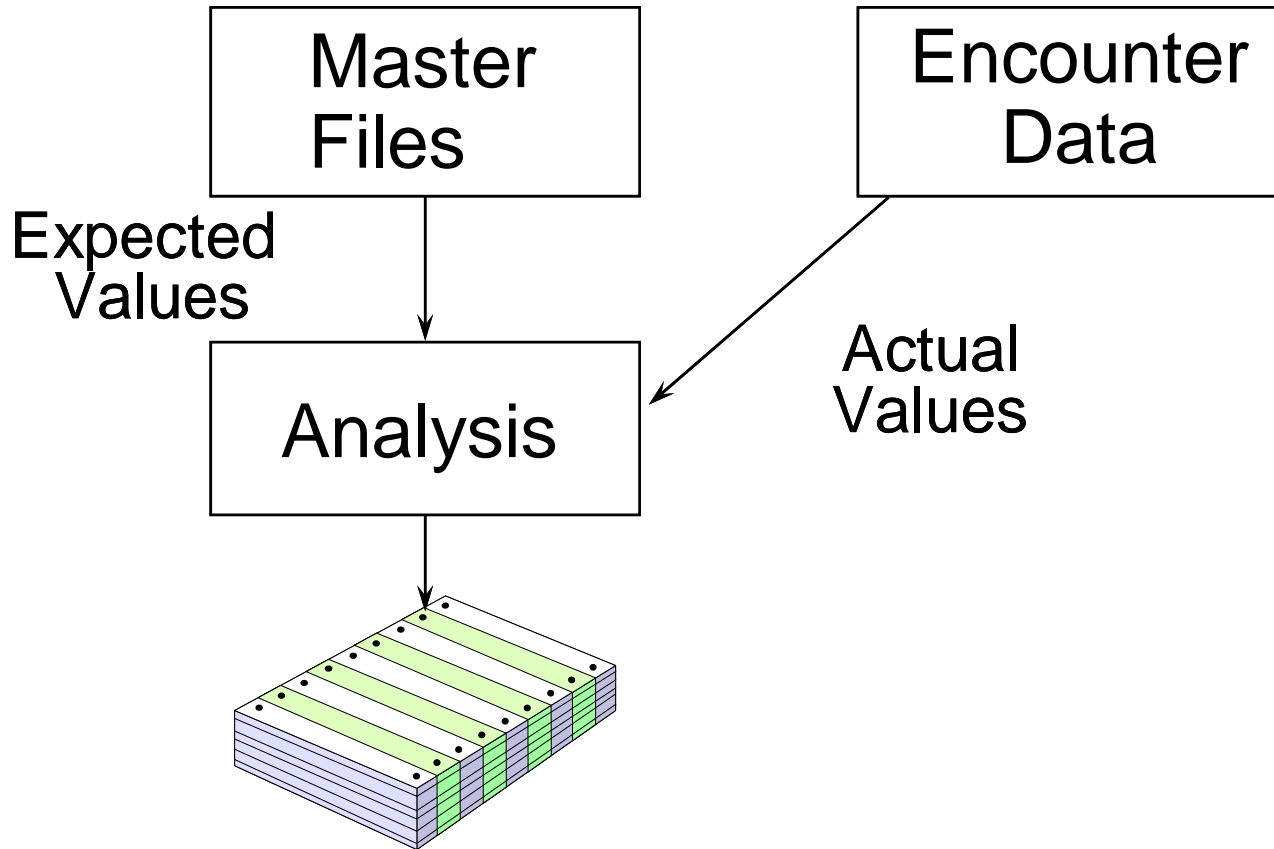
Reporting and Analysis Enabler

	E&M Service	Lab Test	Office Procedure
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Reporting Options

- Report Creation
 - Filters
 - Sorting
 - Grouping
 - Presentation
 - Export
- Online Drill Down Feature
- Save Reports

Analysis and Audit



Questions