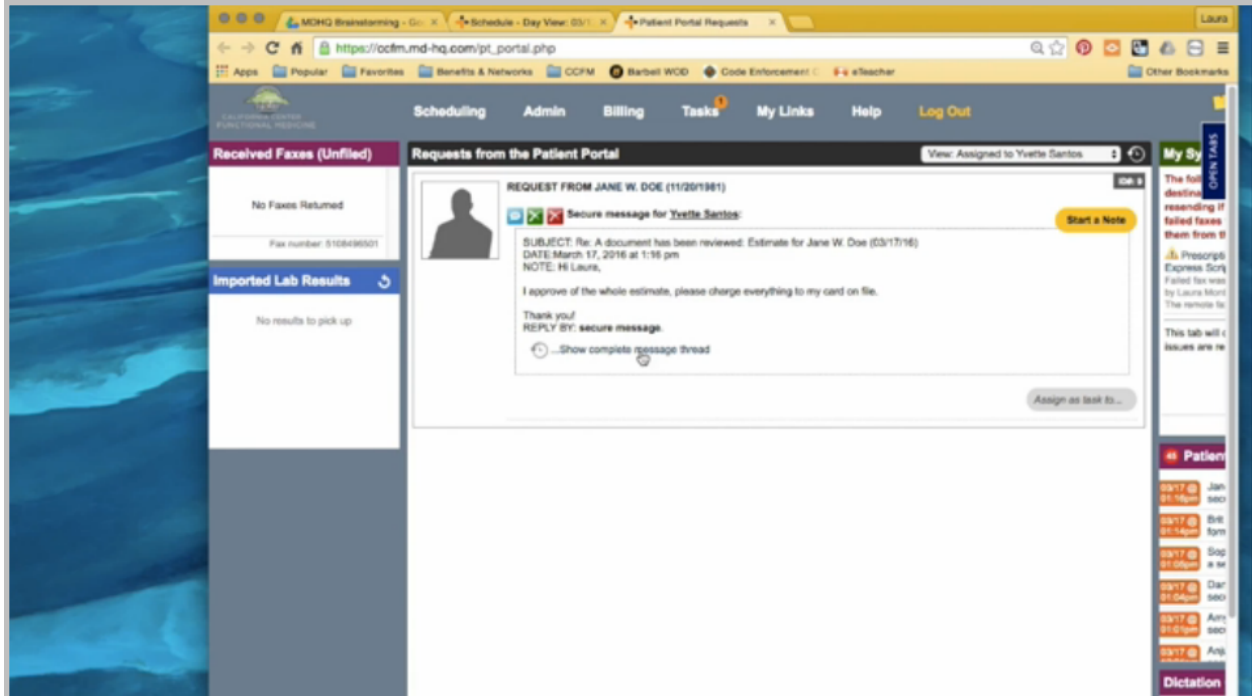
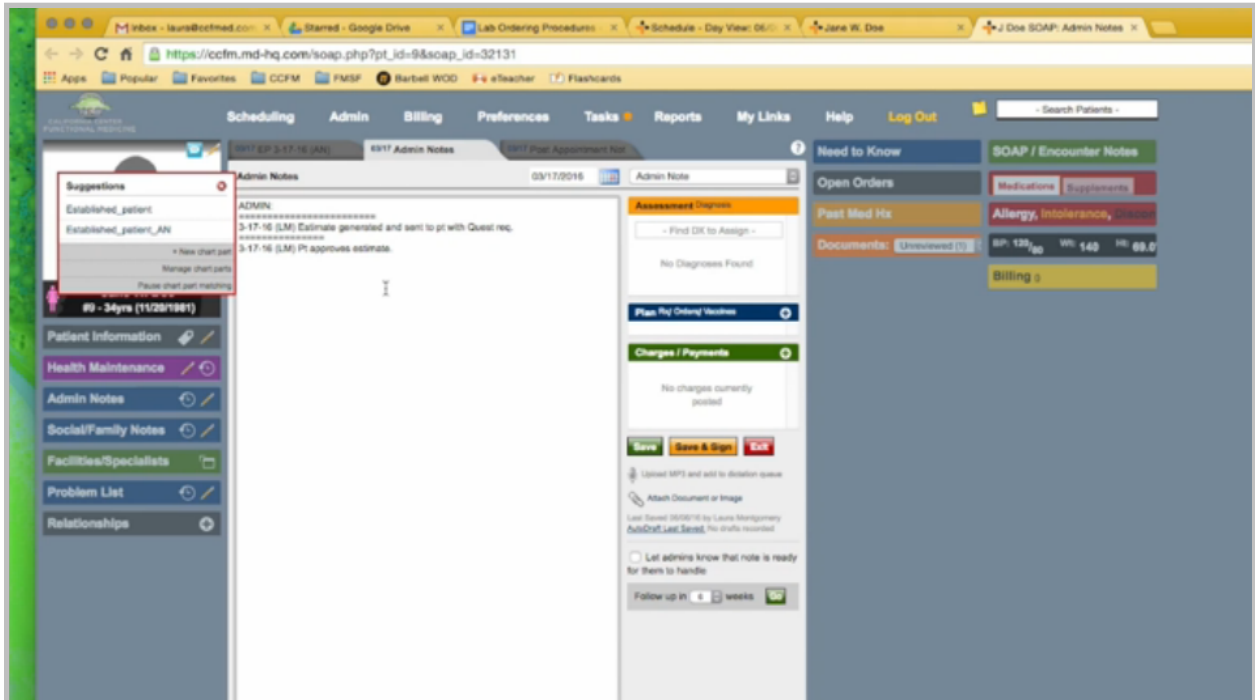


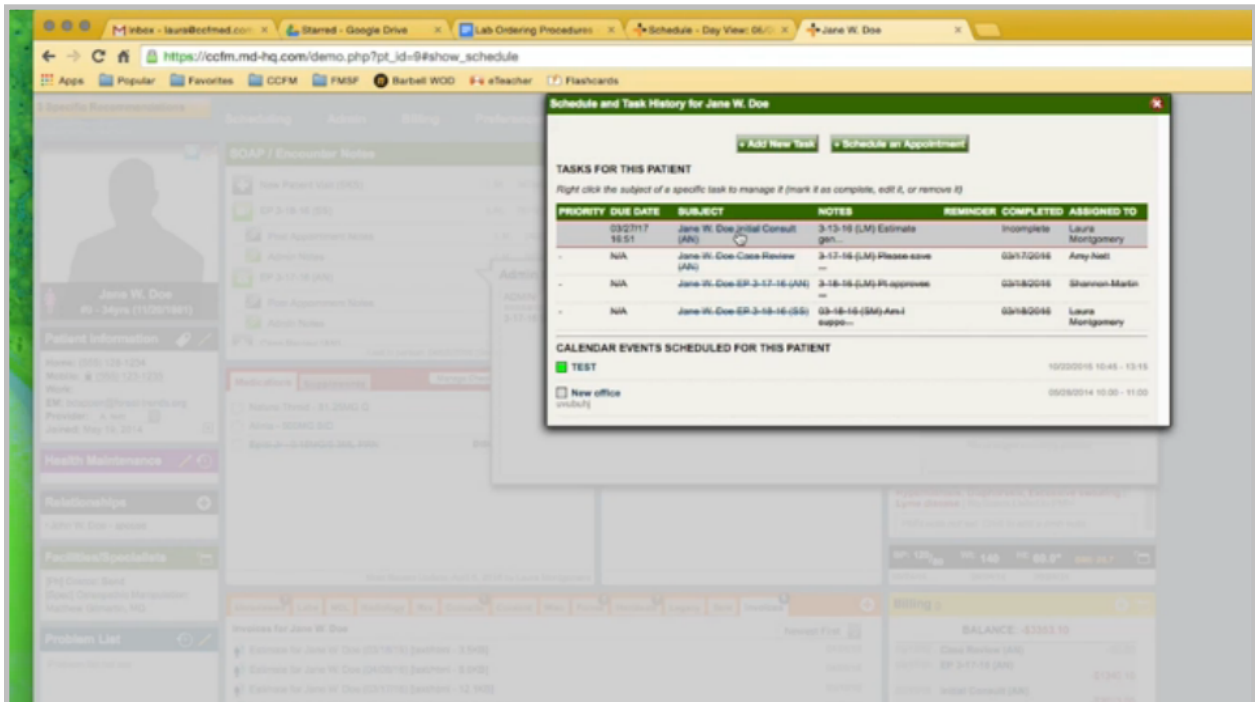
# Processing Charts EP - Part Two



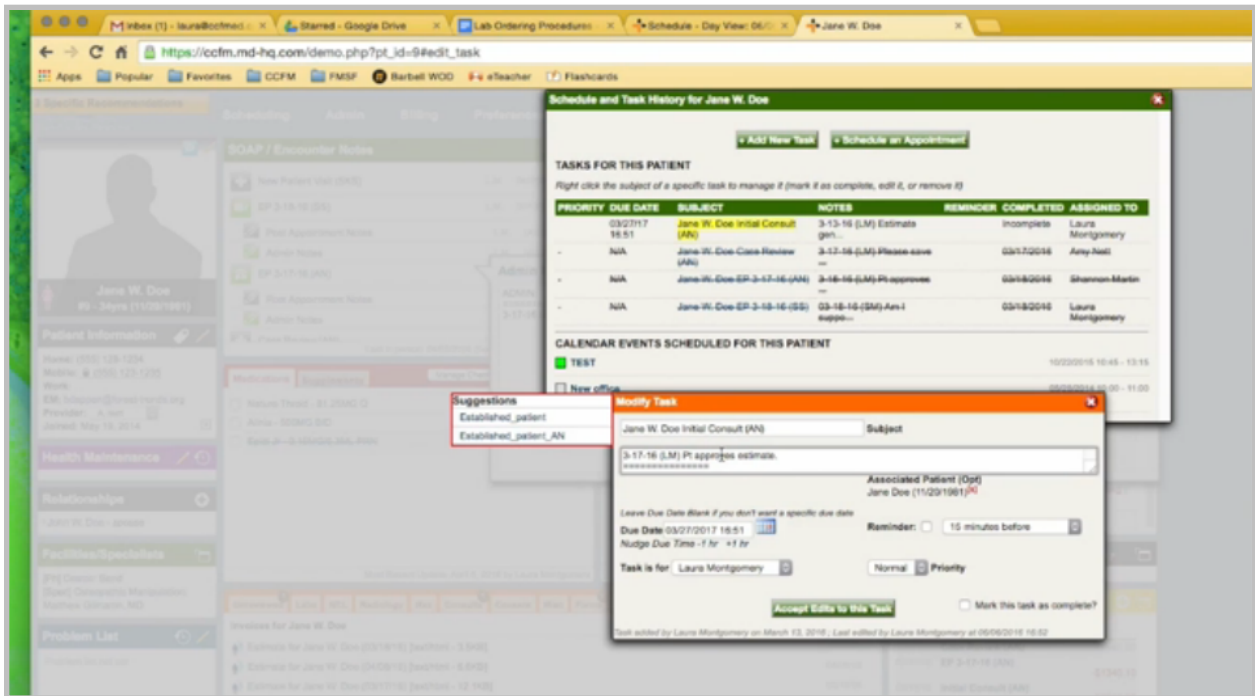
Once a response is received from the patient, review the message to see if she approves of the entire estimate or just parts of it, and make sure she notes that you can charge the card on file. Then click the patient name to open the chart. I'll click to open the admin notes.



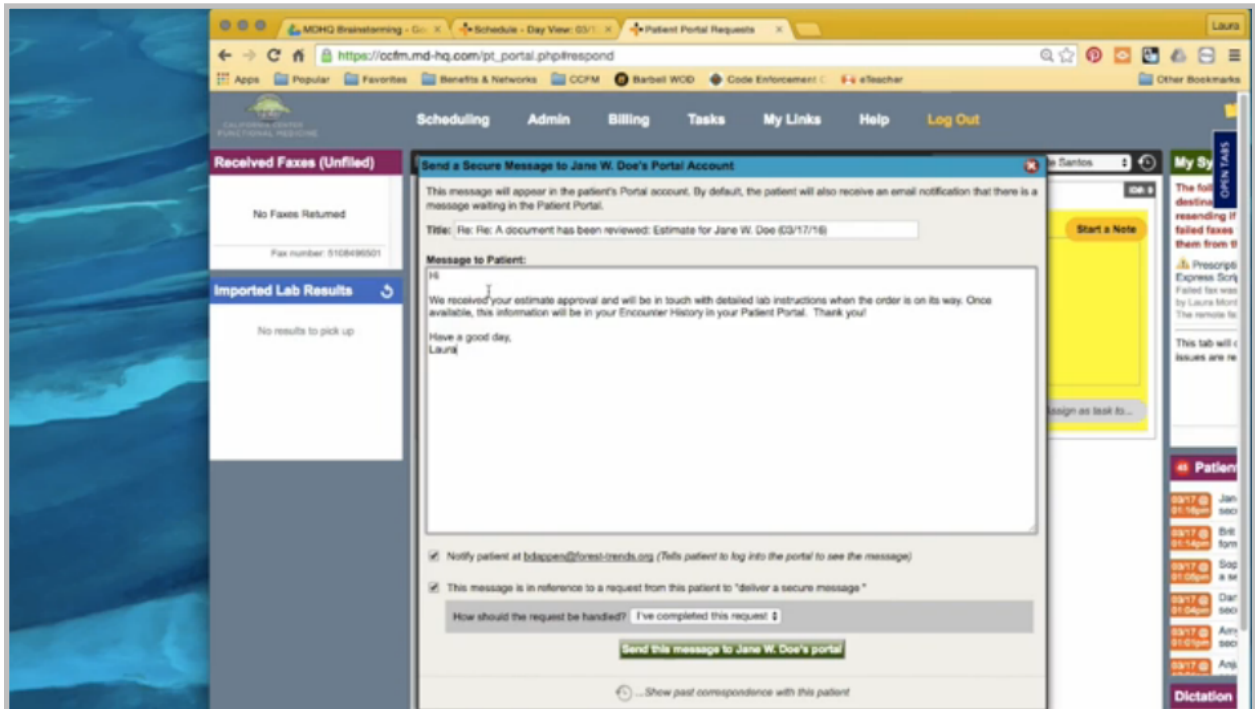
Stamp it, and document that the patient is approving the estimate. Here is also where I would document any changes the patient is requesting to the estimate. Save.



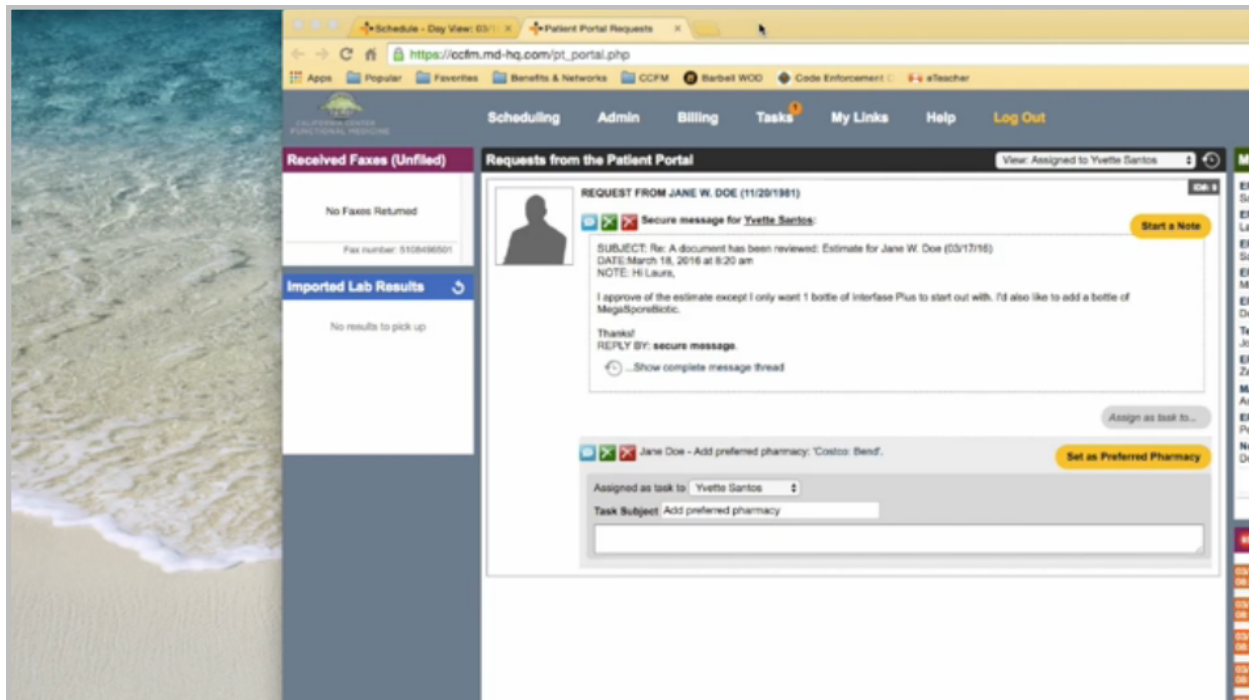
I'll hover on Tasks and pull up the task history to get the task associated with the encounter.



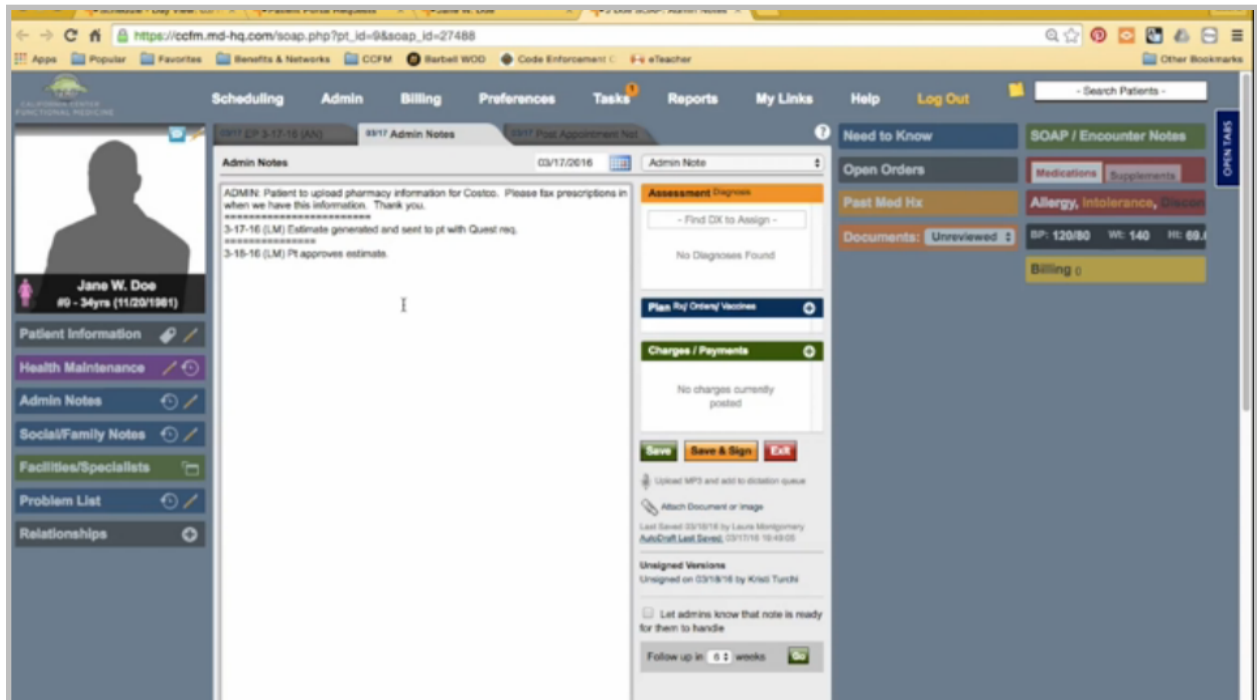
Again, I'm documenting my date and initial stamp that the patient approves the estimate, or if there were changes, I would document that here as well. I remove the due date, and I send it on to our billing person. Accept edits, close this, and then I can close the patient's chart.



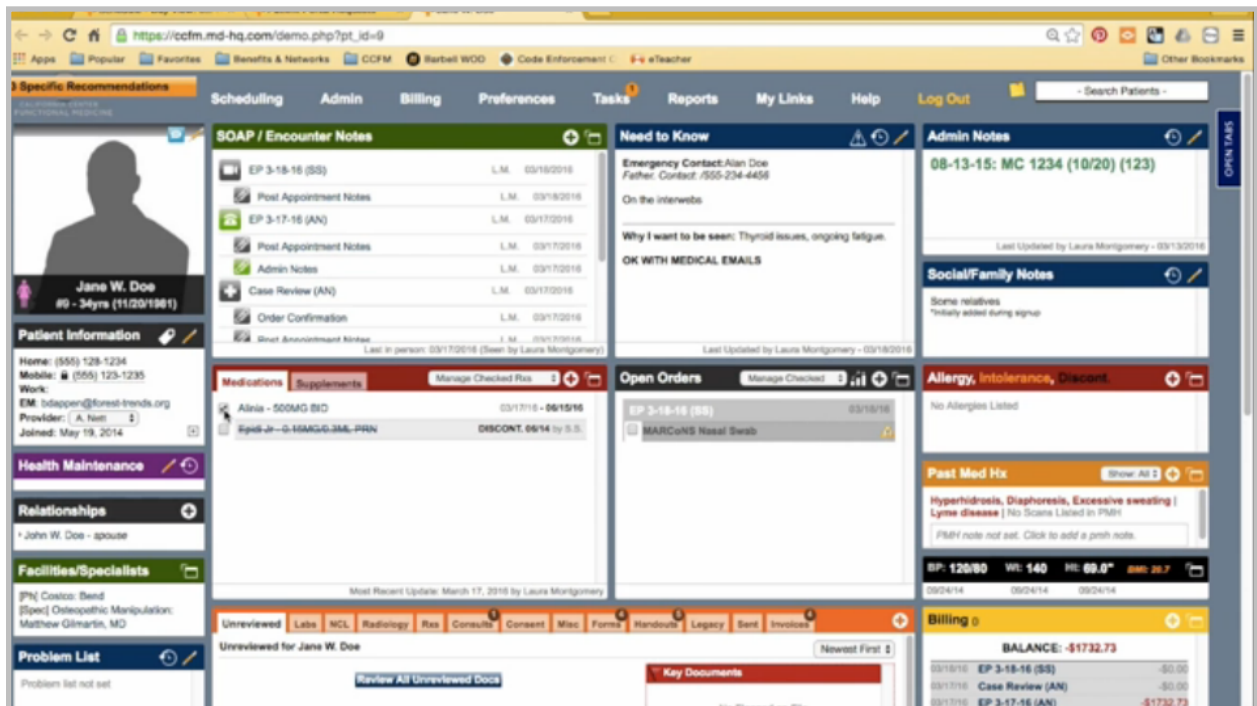
I want to respond to her to let her know we received her approval, thank her for it, and we'll be in touch with detailed instructions.



Once a message comes in to the PPQ from the patient to approve the estimate with modifications, it's a good idea to read the entirety of the message and find out what the patient wants and doesn't want. Also, remember we asked the patient to upload a pharmacy so we can send in a prescription, which she has done here. I'm going to click Set as Preferred Pharmacy. Then I'll click to open her chart.

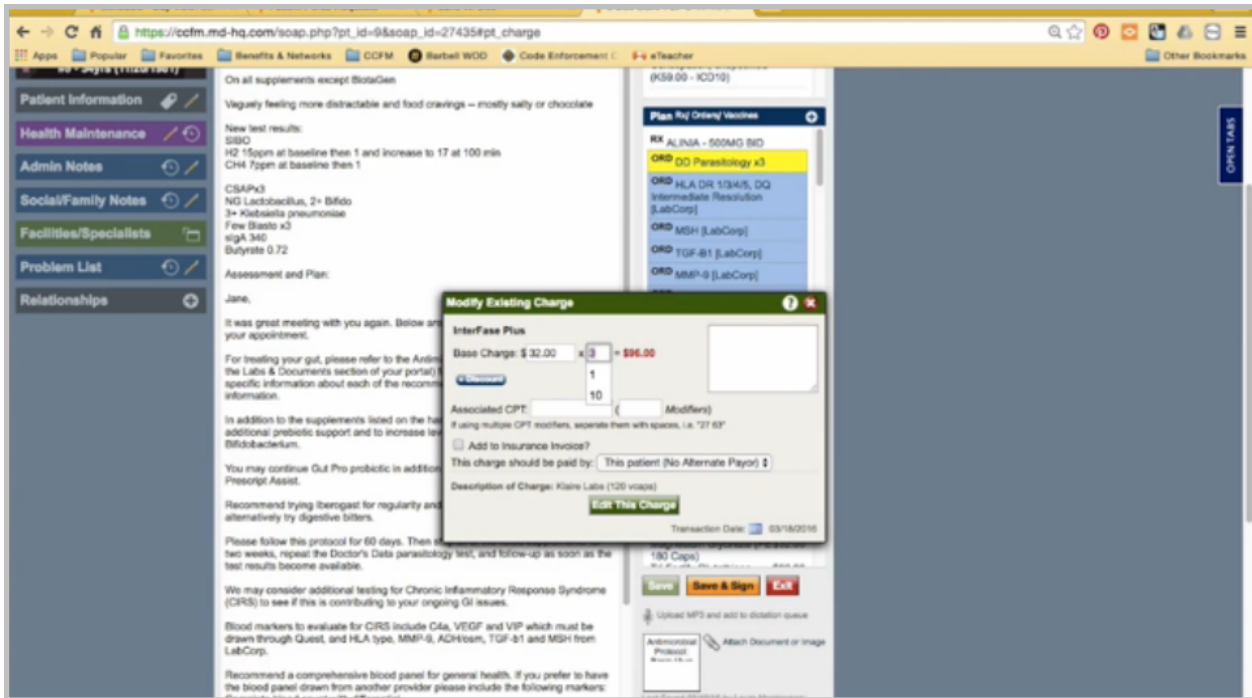


You want to open the admin notes and make a note of everything that happens. I can save that.

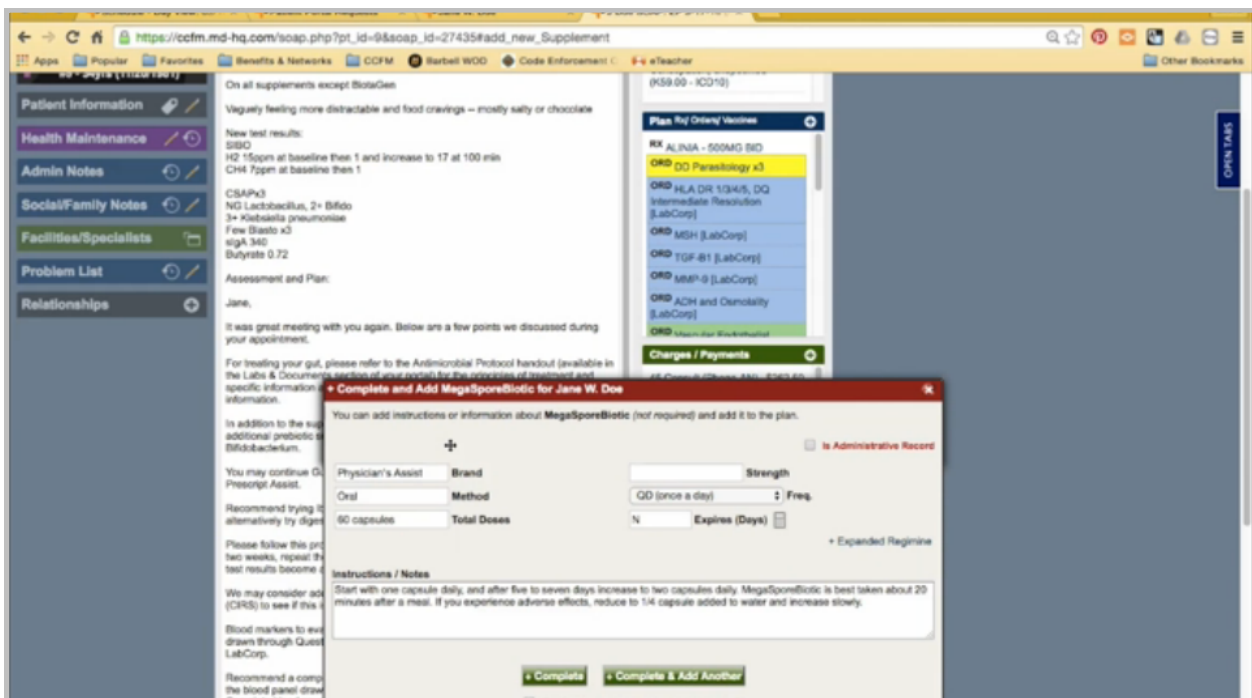


Go back here. You'll see the pharmacy listed here now. To send the medication, I would click on the medication here, create a faxable form, and send it in to Costco.

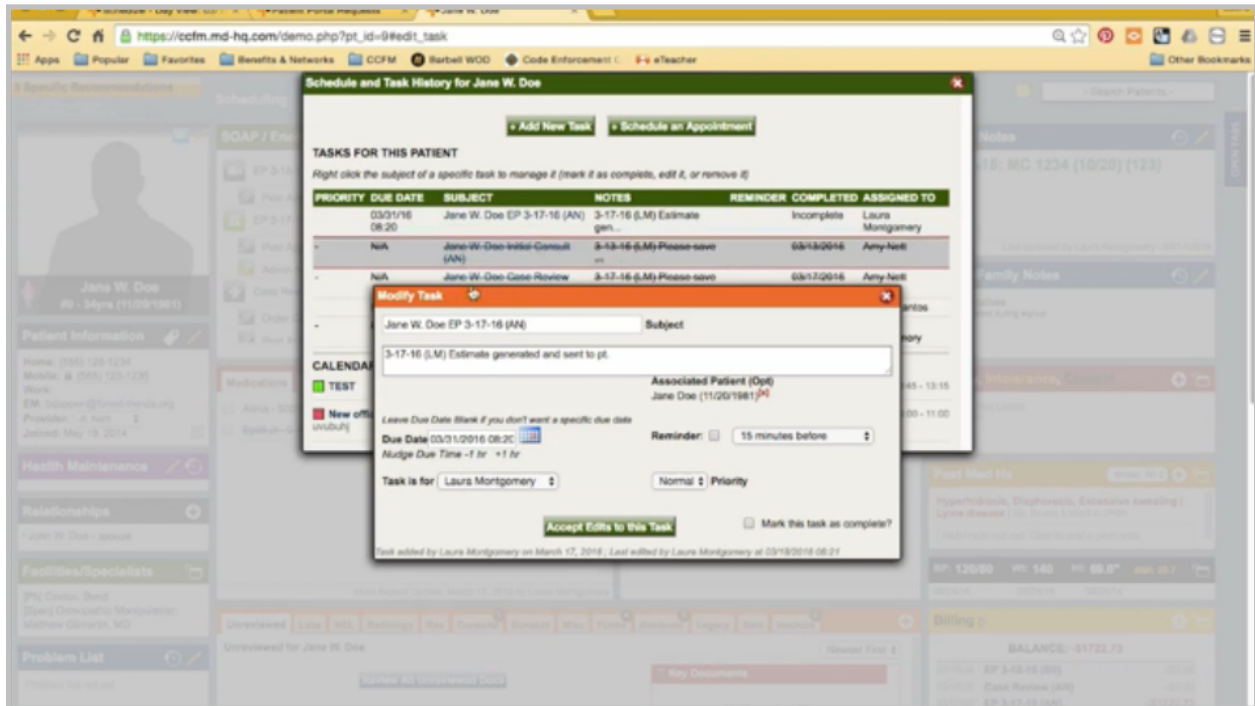
You need to go to the encounter.



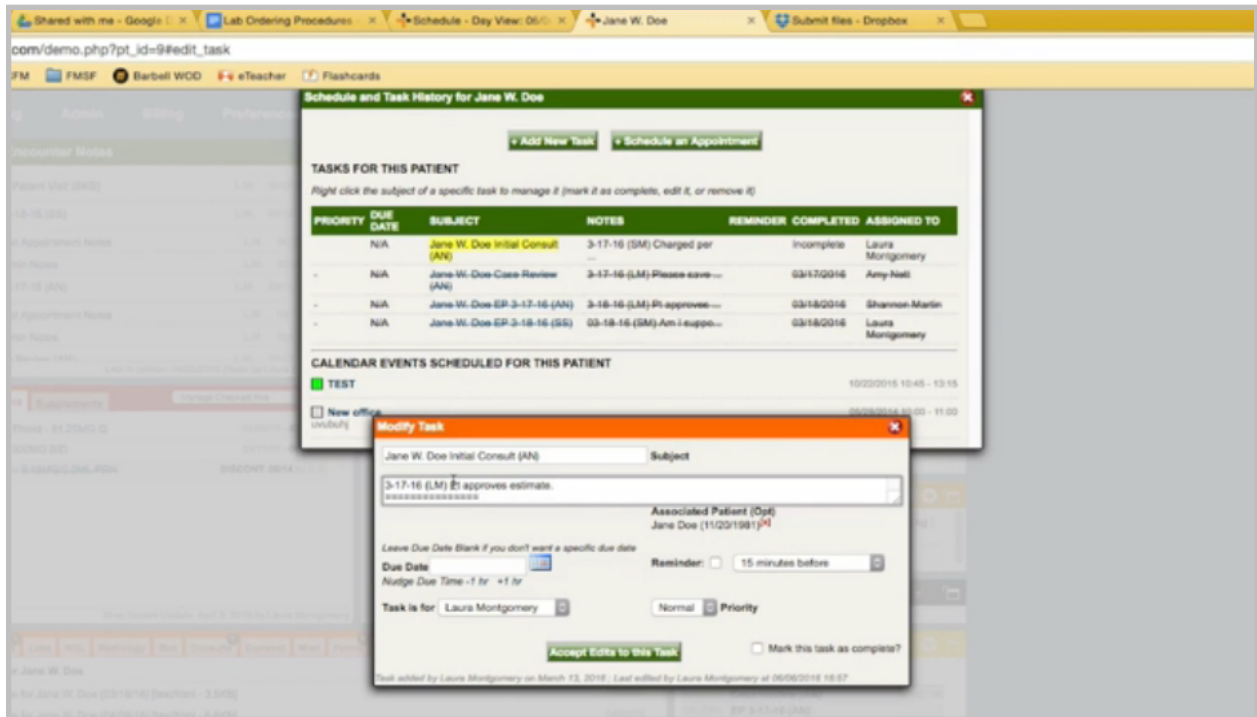
Make the adjustments the patient is requesting, so she only wants one InterFase, and she would like to add MegaSporeBiotic.



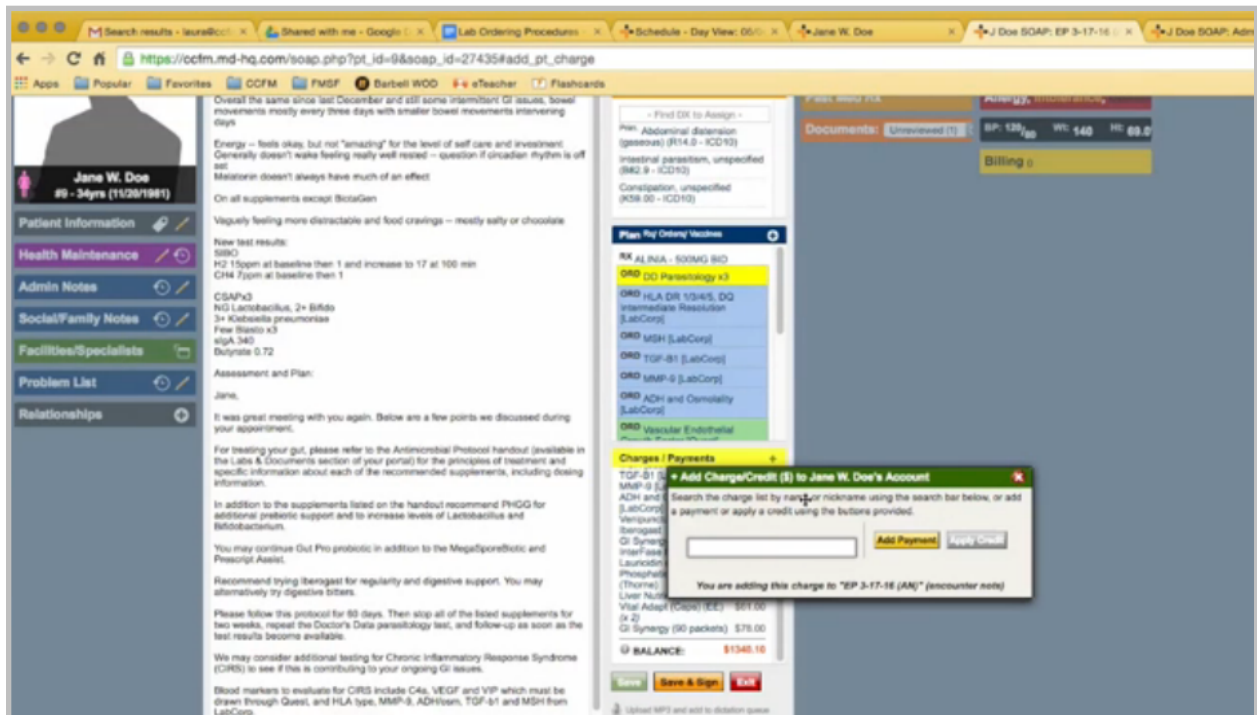
I knew that clinician approval wasn't required for that one, since it's a common one, but it tells you here if it is required or not. I need to add it to both the plan and to the charge box. These boxes always have to match. Now the encounter is ready to go to billing.



I'll close it here. Find the task that is associated with this encounter, and make a note the patient is approving with modifications. I'll remove the due date and send it on to billing.

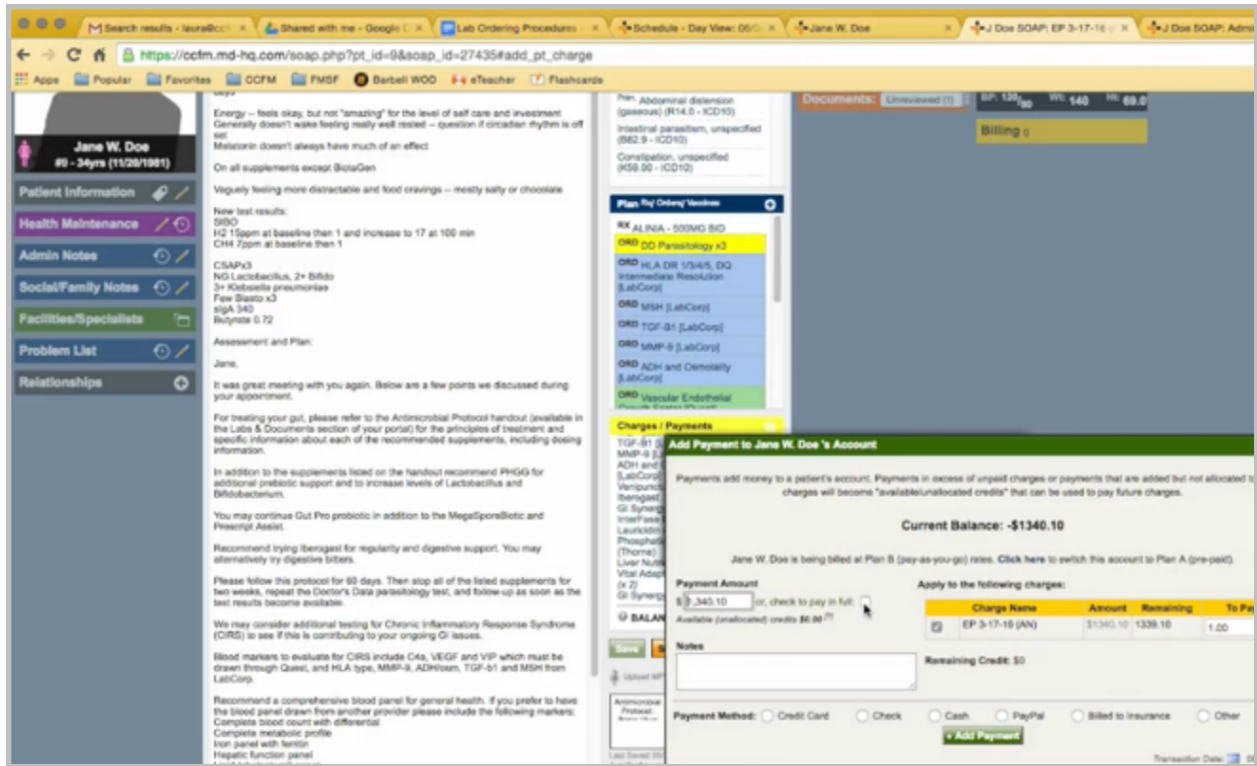


Once the biller receives the task from admin that the patient is approving the estimate, you will click to open the chart. Pull up the admin notes just to make sure there are no special billing notes here or modifications that the patient would like that were missed in the encounter.





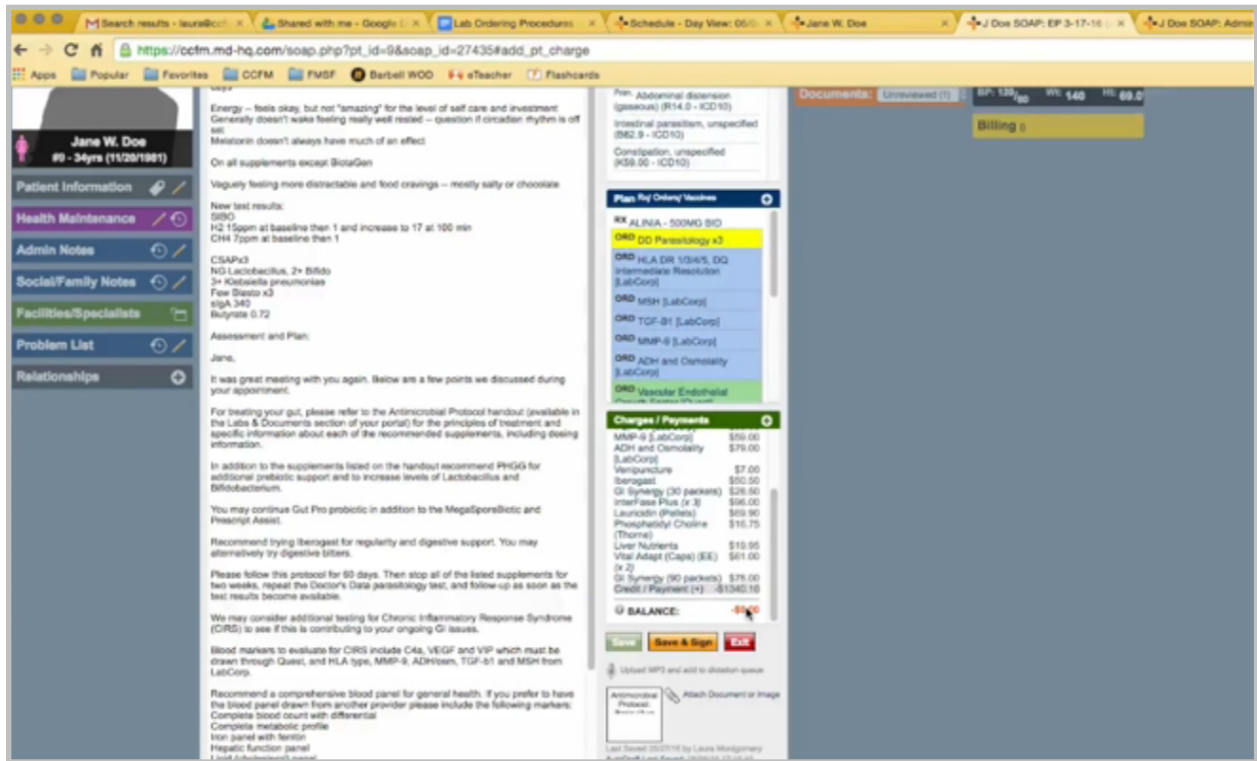
From here, the only thing to do is click the plus sign, add payment.



The screenshot shows a medical software interface for a patient named Jane W. Doe. The interface is divided into several sections:

- Left Sidebar:** Contains navigation tabs for Patient Information, Health Maintenance, Admin Notes, Social/Family Notes, Facilities/Specialists, Problem List, and Relationships.
- Top Section:** Displays patient information (Jane W. Doe, #9 - 34yrs (11/29/1981)) and a list of health maintenance tasks.
- Center Section:** Shows a detailed medical history and assessment. The assessment notes that the patient is doing well but has some digestive issues. It recommends a comprehensive blood panel and a probiotic supplement.
- Right Section:** Contains a list of lab orders (e.g., Abdominal distention, Inestinal parasitism) and a "Charges / Payments" section. The "Charges / Payments" section shows a current balance of -\$1340.10 and a payment amount of \$1345.10. There is a "Billing" button and a "Payment Method" dropdown menu.

You can mark here to pay in full, and it will put all of the balance here. Typically you'll choose credit card, and what will be displayed down here will be the patient's cards that are on file. For this example, I'm going to use cash so that I can actually add the payment to the encounter.

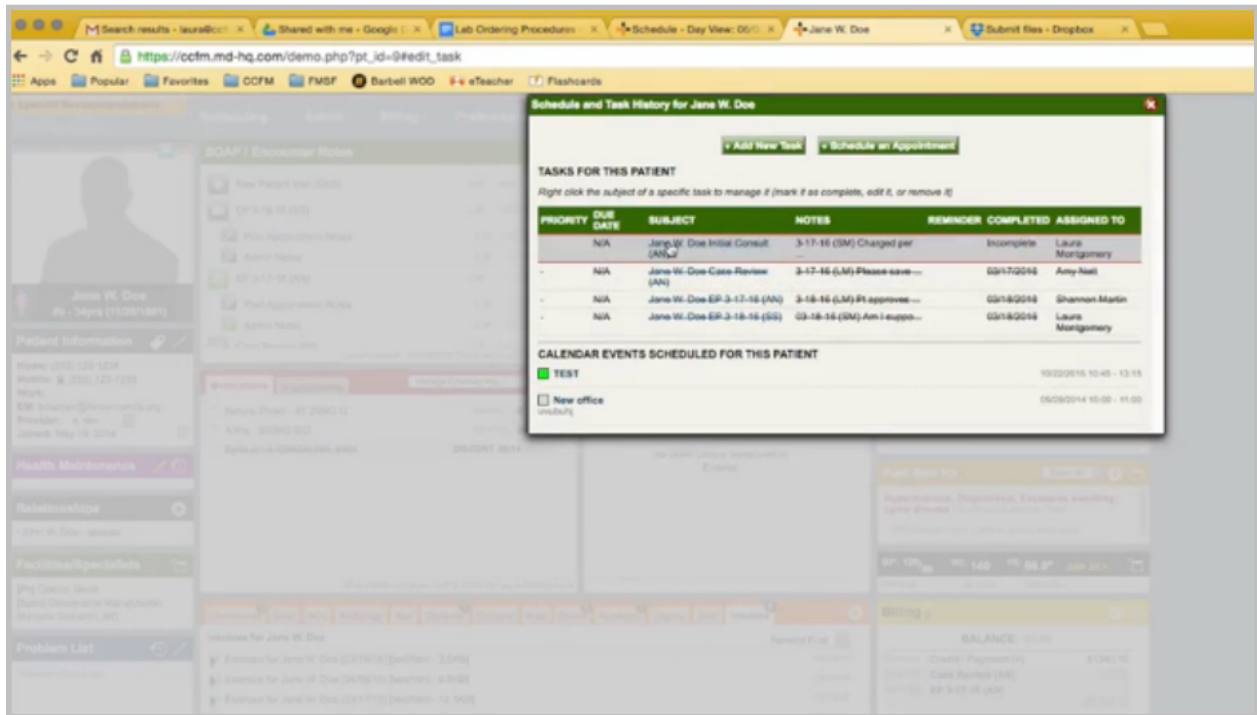


The screenshot shows a medical software interface for a patient named Jane W. Doe. The interface is divided into several sections:

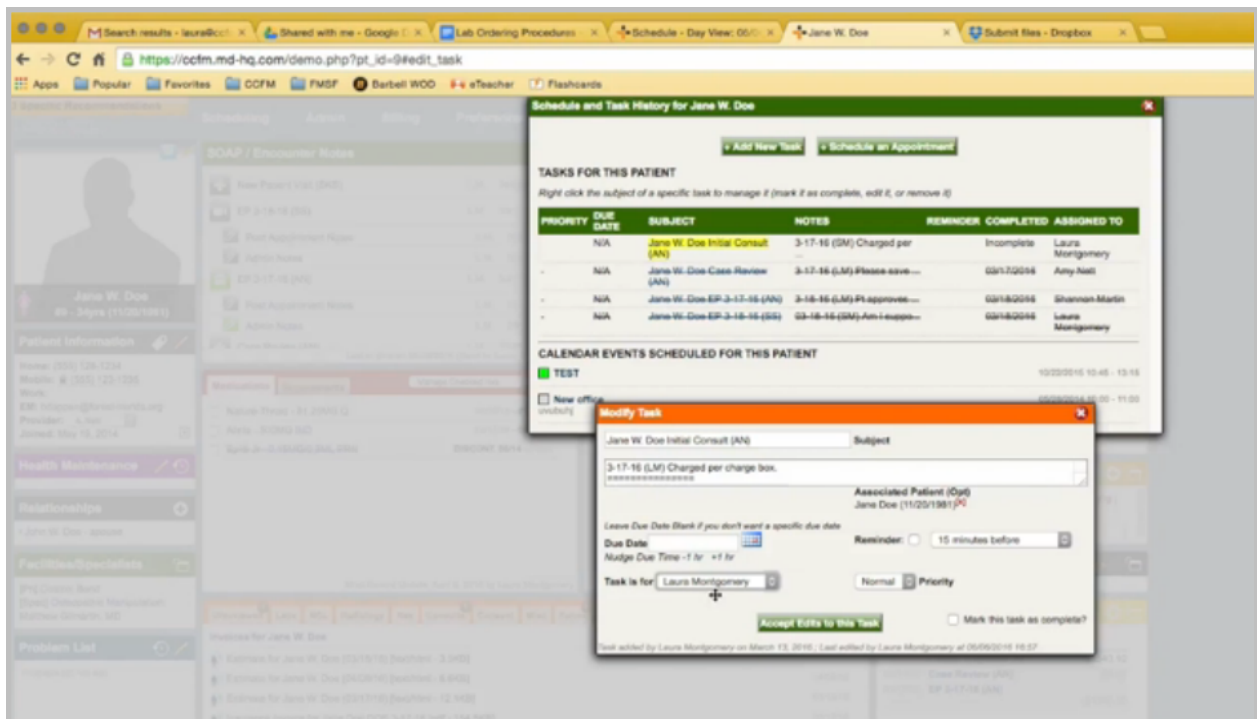
- Patient Information:** Jane W. Doe, #0 - 34yrs (11/29/1981).
- Health Maintenance:** Energy - feels okay, but not "amazing" for the level of self care and investment. Generally doesn't wake feeling really well rested - question if circadian rhythm is off etc. Melatonin doesn't always have much of an effect. On all supplements except Biotagen. Vaguely feeling more distractible and food cravings - mostly salty or chocolate.
- Admin Notes:** New test results: DSD, H2 15ppm at baseline then 1 and increase to 17 at 100 min, CH4 7ppm at baseline then 1. CSAPx3, NG Lactobacillus, 2x Bifido, 2x Bifidobacterium, Few Diasto x3, sigA 340, Butyrate 0.72.
- Assessment and Plan:** Jane. It was great meeting with you again. Below are a few points we discussed during your appointment. For treating your gut, please refer to the Antimicrobial Protocol handout (available in the Labs & Documents section of your portal) for the principles of treatment and specific information about each of the recommended supplements, including dosing information. In addition to the supplements listed on the handout recommend PHGG for additional prebiotic support and to increase levels of Lactobacillus and Bifidobacterium. You may continue Gut Pro probiotic in addition to the MegaSporebiotic and PreSage Assist. Recommend trying Iberogast for regularity and digestive support. You may alternatively try digestive bitters. Please follow this protocol for 60 days. Then stop all of the listed supplements for two weeks, repeat the Doctor's Data parasitology test, and follow-up as soon as the test results become available. We may consider additional testing for Chronic Inflammatory Response Syndrome (CIRS) to see if this is contributing to your ongoing GI issues. Blood markers to evaluate for CIRS include C4a, VEGF and VSP which must be drawn through Quest, and HLA type, MMP-9, ADH/ADN, TGF-β1 and MSH from LabCorp. Recommend a comprehensive blood panel for general health, if you prefer to have the blood panel drawn from another provider please include the following markers: Complete blood count with differential, Complete metabolic profile, Iron panel with ferritin, Hepatic function panel, Lipid (Advanced) panel.
- Lab Orders:**
  - Abdominal distension (Symptom) (R14.0 - ICD10)
  - Impaired parietal, unspecified (M62.9 - ICD10)
  - Constipation, unspecified (K58.00 - ICD10)
- Charges / Payments:**

MMP-9 (LabCorp)	\$55.00
ADH and Osmolality (LabCorp)	\$79.00
Venipuncture	\$7.00
Iberogast	\$50.50
GI Synergy (30 packets)	\$28.50
InterPhase Plus (x 3)	\$95.00
Lauricidin (Pharma)	\$65.90
Phosphatidyl Choline (Thorne)	\$16.75
Liver Nutrients	\$10.95
Vital Adapt (Caps) (ER)	\$61.00
(x 2)	
GI Synergy (30 packets)	\$75.00
Credit / Payment (+)	-\$340.10
<b>BALANCE:</b>	<b>\$0.00</b>

Add payment. You can see that the balance is now zero. At this point in time, I would order all the supplements the patient approves. Go back to the admin notes. Stamp it, and document the charge. Save.

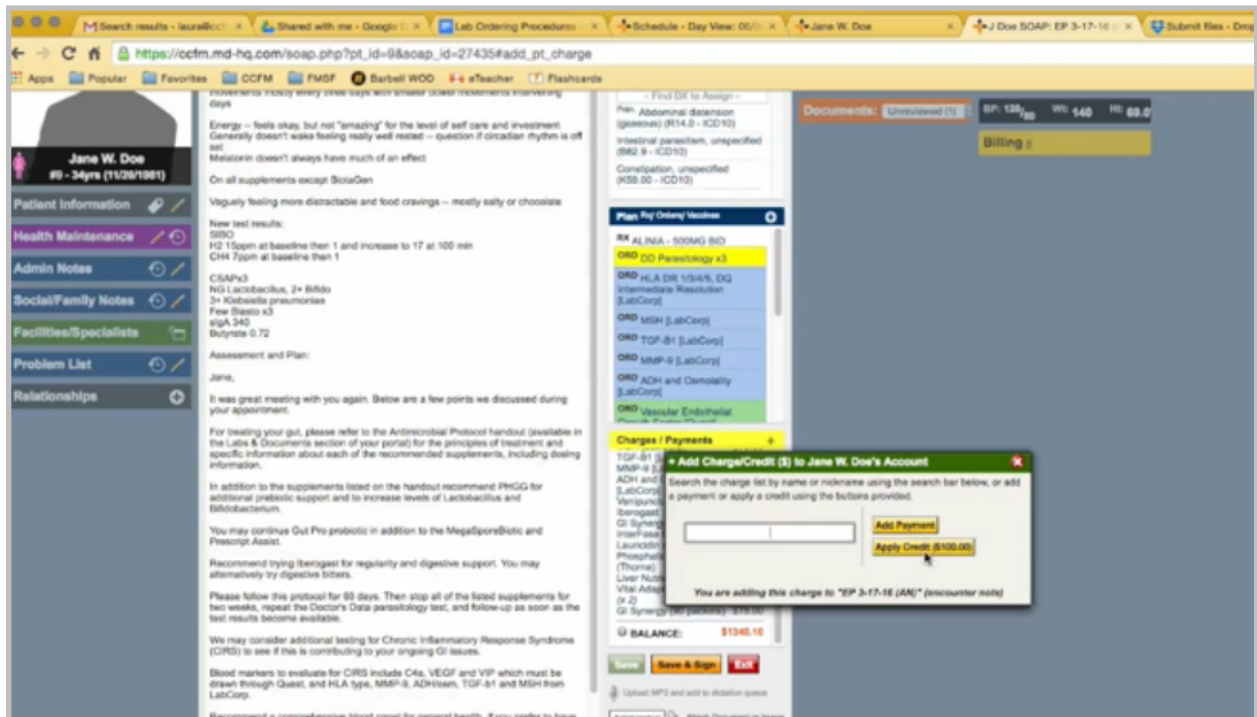


Then I will pull up the task, put that it was charged per charge box, and I would send it back to the admin staff who had sent it to me to continue processing everything.

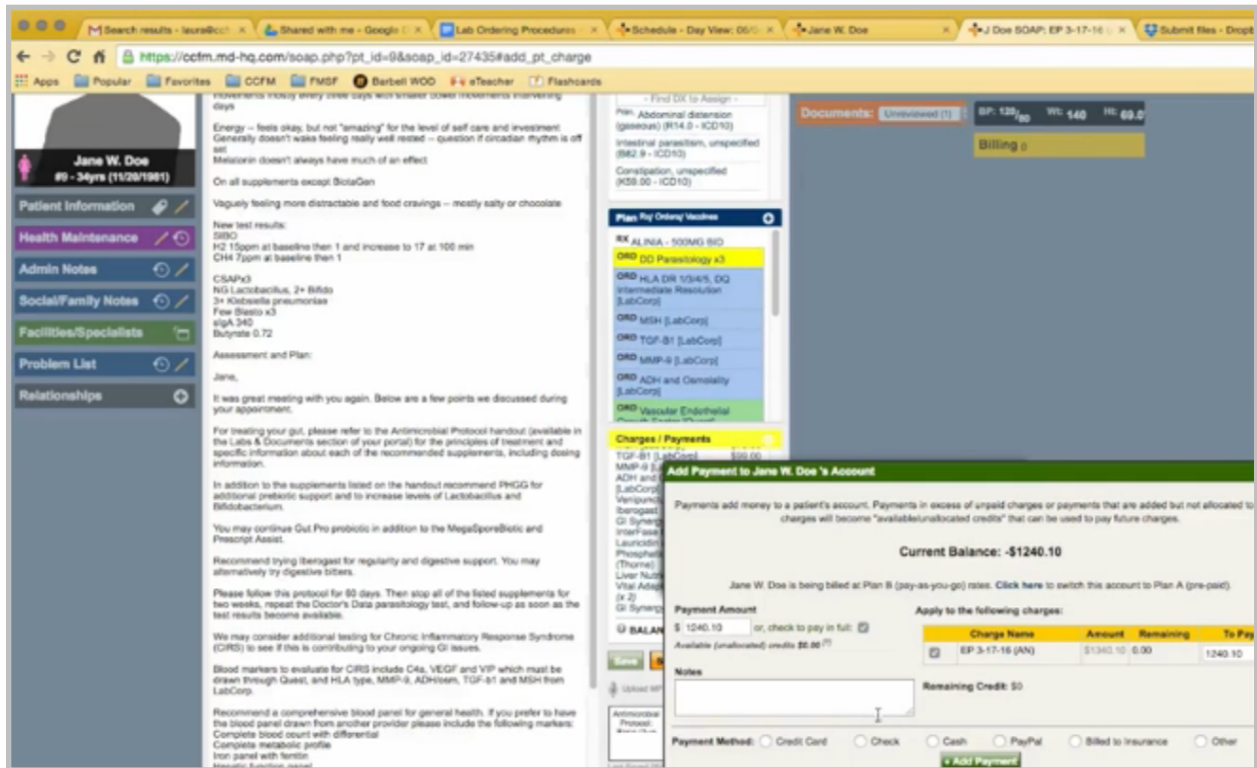


Then you can close the chart.

One other scenario might be accounts that have credits on them. In order to process that, I'm just going to remove this payment here so there is a balance on the account again.



When you click to add a payment, the system will tell you if the patient has a credit. So first, you should apply any outstanding credits.



The screenshot displays a medical billing system interface for a patient named Jane W. Doe. The interface is divided into several sections:

- Left Sidebar:** Contains navigation tabs for Patient Information, Health Maintenance, Admin Notes, Social/Family Notes, Facilities/Specialists, Problem List, and Relationships.
- Top Section:** Shows patient demographics (Jane W. Doe, #9 - 34yrs (11/29/1981)) and a list of medical notes. One note discusses energy levels and the effectiveness of Metacore supplements.
- Lab Orders Section:** Lists various lab tests such as RX ALINA - 500MG BID, ORD CD Parasitology x3, and ORD HLA (DR 1/3/4/5, DQ Intermediate Resolution [LabCorp]).
- Charges / Payments Section:** Shows a current balance of -\$1240.10. A payment of \$1240.10 is being applied, resulting in a remaining credit of \$0.00.
- Payment Method Section:** Offers options for Credit Card, Check, Cash, PayPal, Billed to Insurance, and Other.

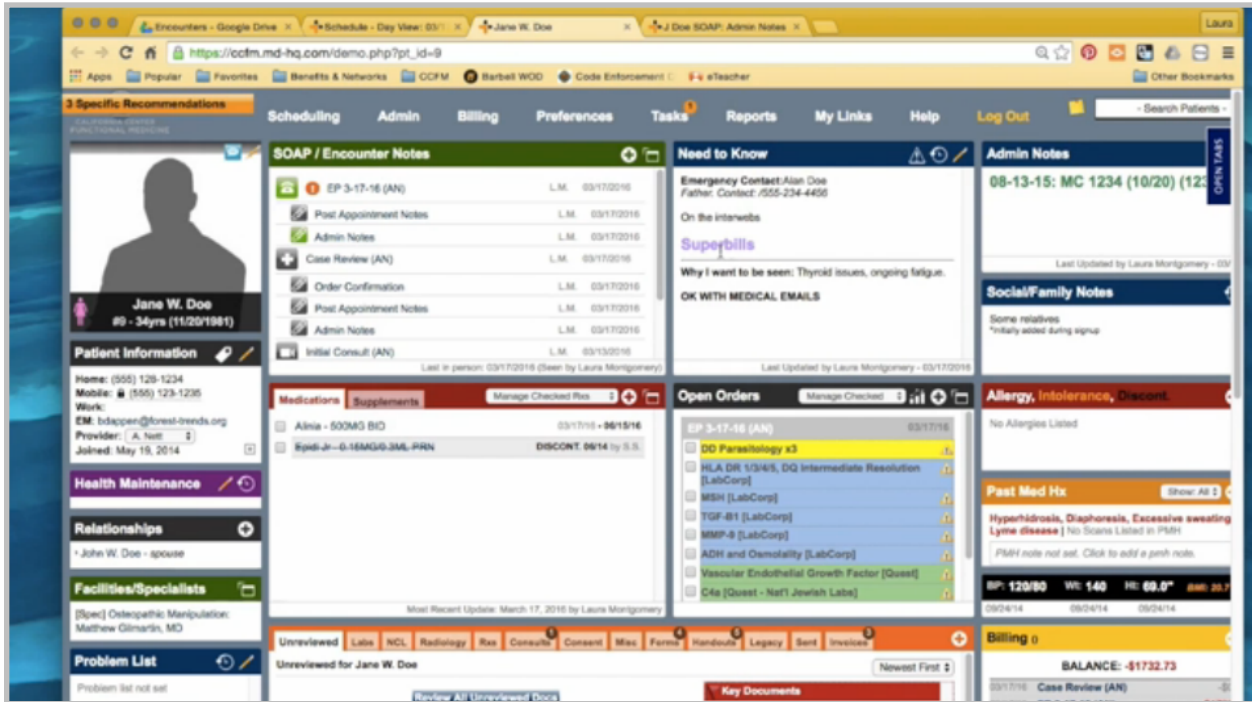
Now you can apply the rest of the payment. The credit payment doesn't show here.

Qty	DOS	Encounter Note	Charge Name	Quantity	Added By	Notes	Date	Billed to	Discount %	Amount	Insur.
1	03/17/16	EP 3-17-16 (AN)	Phosphatidyl Choline (Thorne)	1	L.M.		06/06/16	n/a		-\$16.75	-\$0.00
1	03/17/16	EP 3-17-16 (AN)	Lactaid (Packets)	1	L.M.		06/06/16	n/a		-\$69.90	-\$0.00
3	03/17/16	EP 3-17-16 (AN)	InterFace Plus	3	L.M.		06/06/16	n/a		-\$96.00	-\$0.00
1	03/17/16	EP 3-17-16 (AN)	Liver Nutrients	1	L.M.		06/06/16	n/a		-\$19.95	-\$0.00
1	03/17/16	EP 3-17-16 (AN)	45 Consult (Phone-AN)	1	L.M.		06/06/16	n/a		-\$262.50	-\$0.00
1	03/17/16	EP 3-17-16 (AN)	Credit / Payment (+) (Cash Payment)	1	L.M.		06/06/16	n/a		\$1240.10	-\$0.00
1	03/17/16	EP 3-17-16 (AN)	GI Synergy (30 packets)	1	L.M.		06/06/16	n/a		-\$78.00	-\$0.00
1	03/17/16	EP 3-17-16 (AN)	GI Synergy (30 packets)	1	L.M.		06/06/16	n/a		-\$28.50	-\$0.00
2	03/17/16	EP 3-17-16 (AN)	Vital Adapt (Caps) (BE)	2	L.M.		06/06/16	n/a		-\$61.00	-\$0.00
1	03/17/16	EP 3-17-16 (AN)	MGH [LabCorp]	1	L.M.		06/06/16	n/a		-\$79.00	-\$0.00
1	03/17/16	EP 3-17-16 (AN)	DD Parasitology x3	1	L.M.		06/06/16	n/a		-\$135.00	-\$0.00
1	03/17/16	EP 3-17-16 (AN)	Bonigast	1	L.M.		06/06/16	n/a		-\$50.50	-\$0.00
1	03/17/16	EP 3-17-16 (AN)	TGF-β1 [LabCorp]	1	L.M.		06/06/16	n/a		-\$99.00	-\$0.00
1	03/17/16	EP 3-17-16 (AN)	HLA DR 1/3/4/5, DQ Intermediate Resolution [LabCorp]	1	L.M.		06/06/16	n/a		-\$199.00	-\$0.00
1	03/17/16	EP 3-17-16 (AN)	MMP-9 [LabCorp]	1	L.M.		06/06/16	n/a		-\$59.00	-\$0.00
1	03/17/16	EP 3-17-16 (AN)	ADH and Osmolality [LabCorp]	1	L.M.		06/06/16	n/a		-\$79.00	-\$0.00
1	03/17/16	EP 3-17-16 (AN)	Veripuncture	1	L.M.		06/06/16	n/a		-\$7.00	-\$0.00
1	03/17/16	Case Review (AN)	Detox Gabe	1	L.M.		03/17/16	n/a		\$0.00	-\$0.00
4	03/17/16	Case Review (AN)	Mineral 650 (w/ Cu & Fe)	4	L.M.		03/17/16	n/a		\$0.00	-\$0.00
2	03/17/16	Case Review (AN)	EDTA + R-Lipoic Acid	2	L.M.		03/17/16	n/a		\$0.00	-\$0.00
2	03/17/16	Case Review (AN)	GI Detox 3-Day Cleanse	2	L.M.		03/17/16	n/a		\$0.00	-\$0.00
4	03/17/16	Case Review (AN)	MegaSporBiotic	4	L.M.		03/17/16	n/a		\$0.00	-\$0.00
1	03/17/16	Case Review (AN)	Cleanse Co-Factors	1	L.M.		03/17/16	n/a		\$0.00	-\$0.00
1	03/17/16	Case Review (AN)	Case Review (Office-AN)	1	L.M.		03/17/16	n/a		\$0.00	-\$0.00
1	03/17/16	Case Review (AN)	Credit / Payment (+) (Cash Payment)	1	L.M.		06/06/16	n/a		\$100.00	-\$0.00
1	03/17/16	Case Review (AN)	Cytex Army #4	1	L.M.		03/17/16	n/a		Discount Level 3.00	\$0.00
1	03/17/16	Case Review (AN)	Cytex Army #3	1	L.M.		03/17/16	n/a		Discount Level 3.00	\$0.00

However, when you go to the billing box, you can view the application of the credit here.

PRIORITY	CREATED	SUBJECT	NOTES	PATIENT	UPDATED
Normal	03/17/16 13:02	Jane W. Doe EP 3-17-16 (AN)	3-17-16 (AM) Charged per charge box. ***** 3-17-16 (AM) Pt approval estimate.	Jane W. Doe	03/17/16 13:41

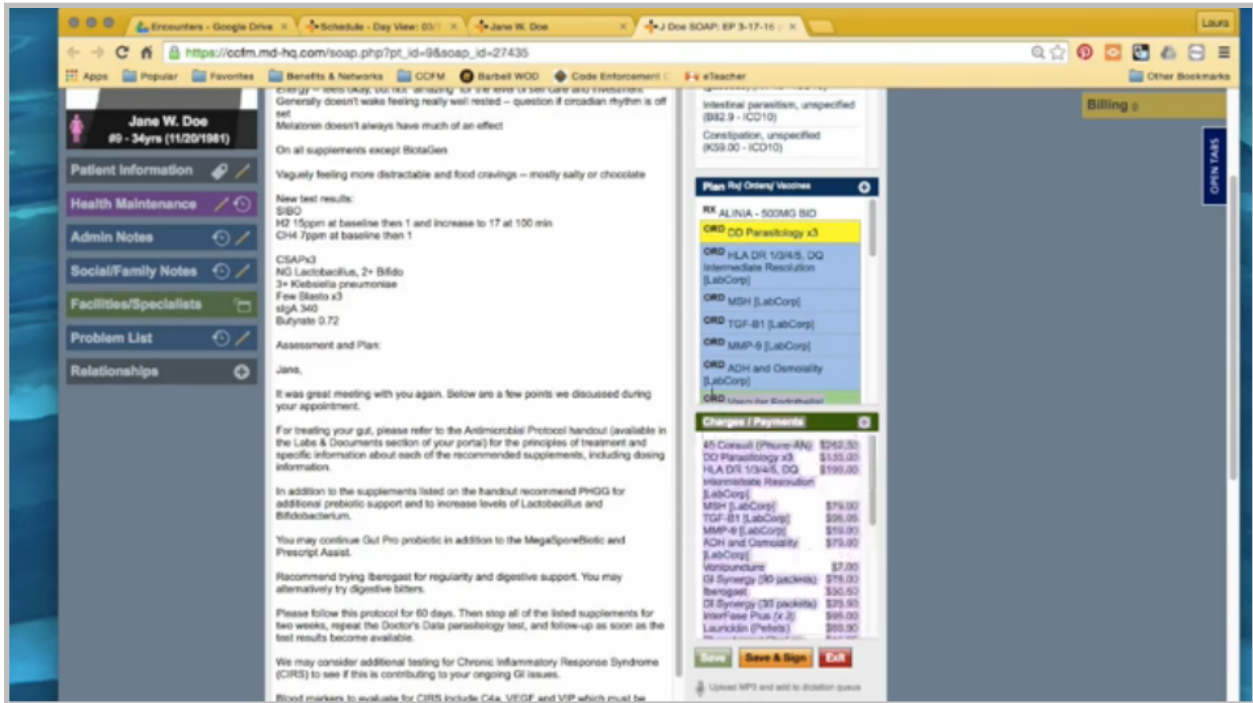
Once admin staff receives the task back from billing, it will note that everything has been charged. Click on the patient's name to open the chart. Open the admin notes. There are no notes here from billing that anything is on backorder. I'm going to notate that I'm going to complete the encounter by ordering the tests.



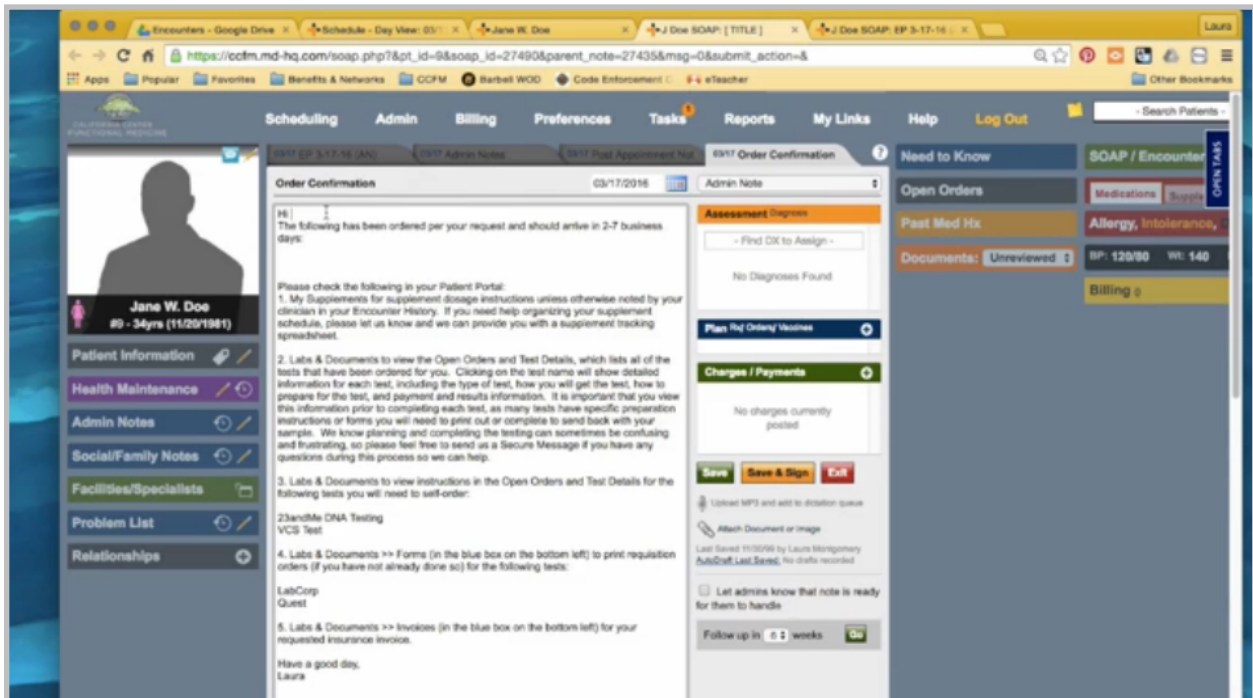
The screenshot displays a medical EMR system interface for patient Jane W. Doe. The interface is organized into several panels:

- Left Panel:** Patient information including name (Jane W. Doe, 49 - 34yrs), contact details (Home: (555) 123-1234, Mobile: (555) 123-1235, Work: (555) 123-1236), email (jdoe@forest-trends.org), provider (A. Holt), and join date (May 15, 2014). It also shows health maintenance, relationships (John W. Doe - spouse), and facilities/specialists (Open Chiropractic Manipulation: Matthew Olmarin, MD).
- Top Navigation:** Includes tabs for Scheduling, Admin, Billing, Preferences, Tasks, Reports, My Links, and Help. A search bar and 'Log Out' button are also present.
- SOAP / Encounter Notes:** A list of notes including 'EP 3-17-16 (AN)', 'Post Appointment Notes', 'Admin Notes', 'Case Review (AN)', 'Order Confirmation', 'Post Appointment Notes', 'Admin Notes', and 'Initial Consult (AN)'. The last person to view the notes was Laura Montgomery on 03/17/2016.
- Medications / Supplements:** Shows 'Alinia - 500MG BID' and 'EpiPen Jr - 0.15MG/0.1ML-PRN' with a 'DISCONT 06/14' by J.S.S. Most recent update is from March 17, 2016.
- Open Orders:** A list of lab orders including 'DD Parasitology x3', 'HLA DR1/3/4/5, DQ Intermediate Resolution [LabCorp]', 'MSH [LabCorp]', 'TGF-β1 [LabCorp]', 'MMP-9 [LabCorp]', 'ADH and Osmolality [LabCorp]', 'Vascular Endothelial Growth Factor [Quest]', and 'C4a [Quest - Nat'l Jewish Labs]'. Most recent update is from 03/17/16.
- Need to Know:** Contains emergency contact information (Alan Doe, Father, Contact: /555-234-4455), a note about internet access, a 'Superbills' link, and a note about thyroid issues and ongoing fatigue. It also states 'OK WITH MEDICAL EMAILS'.
- Admin Notes:** Shows a note from 08-13-15: MC 1234 (10/20) (12). Last updated by Laura Montgomery on 03/17/2016.
- Social/Family Notes:** Indicates 'Some relatives' and 'Initially added during sign up'.
- Allergy, Intolerance, Discount:** Shows 'No Allergies Listed'.
- Past Med Hx:** Lists 'Hyperhidrosis, Diaphoresis, Excessive sweating' and 'Lyme disease'. It notes 'No Scans Listed in PMH' and 'PMH note not set. Click to add a past note.' Vital signs are listed as BP: 120/80, WT: 140, HI: 69.8", and age: 39.7.
- Billing:** Shows a balance of -\$1732.73. A note from 03/17/16 indicates 'Case Review (AN)'.
- Bottom Panel:** Includes a 'Key Documents' section and a 'Review All Unreviewed Docs' button.

I also noticed here that the patient wants superbills created at every encounter, so I'll note that as well. I can go ahead and save and sign the note. I don't need to send it to the patient.

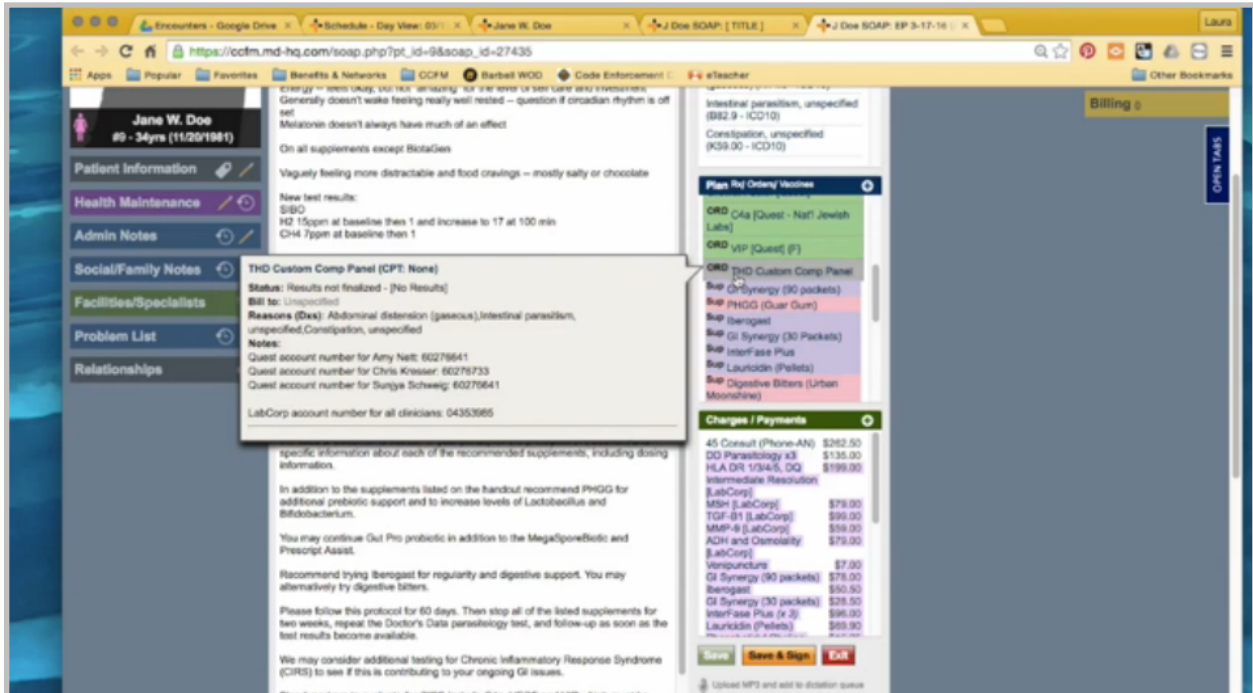


At this point, I would use the lab-ordering procedures document to go through and order all the rest of the testing, and then from the encounter, I want to highlight all of the charges. Create one final subnote, which is the order confirmation.

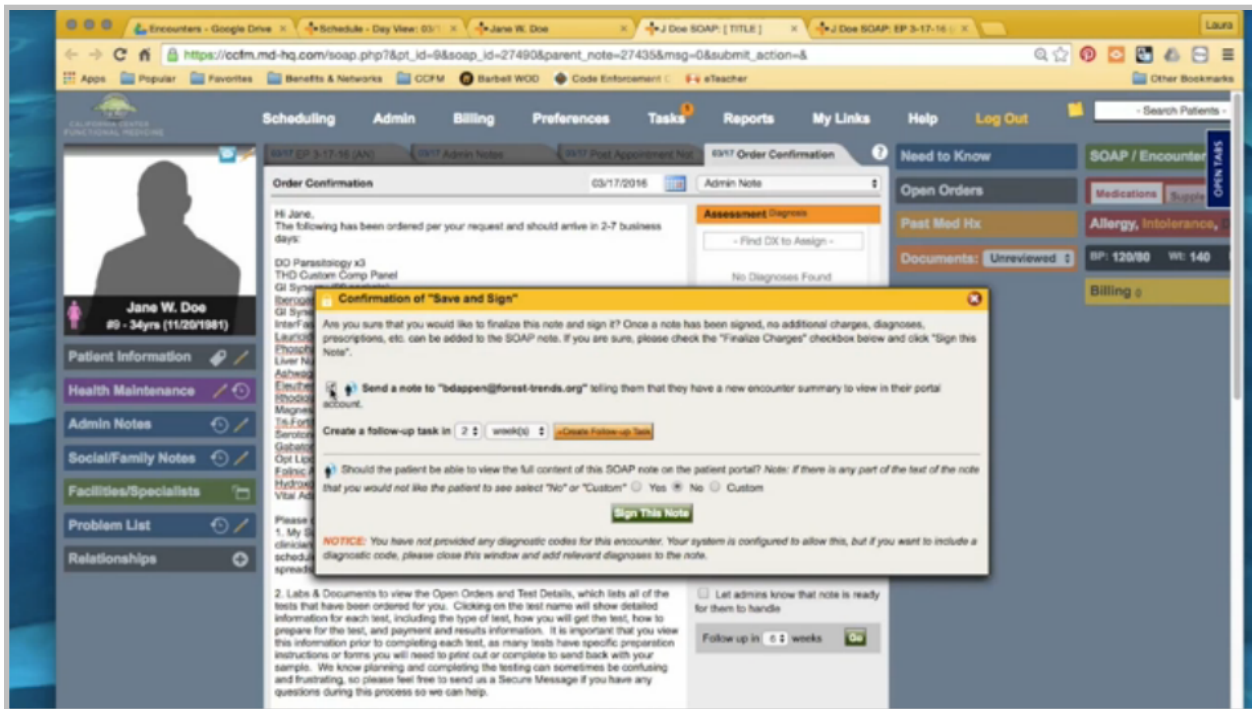




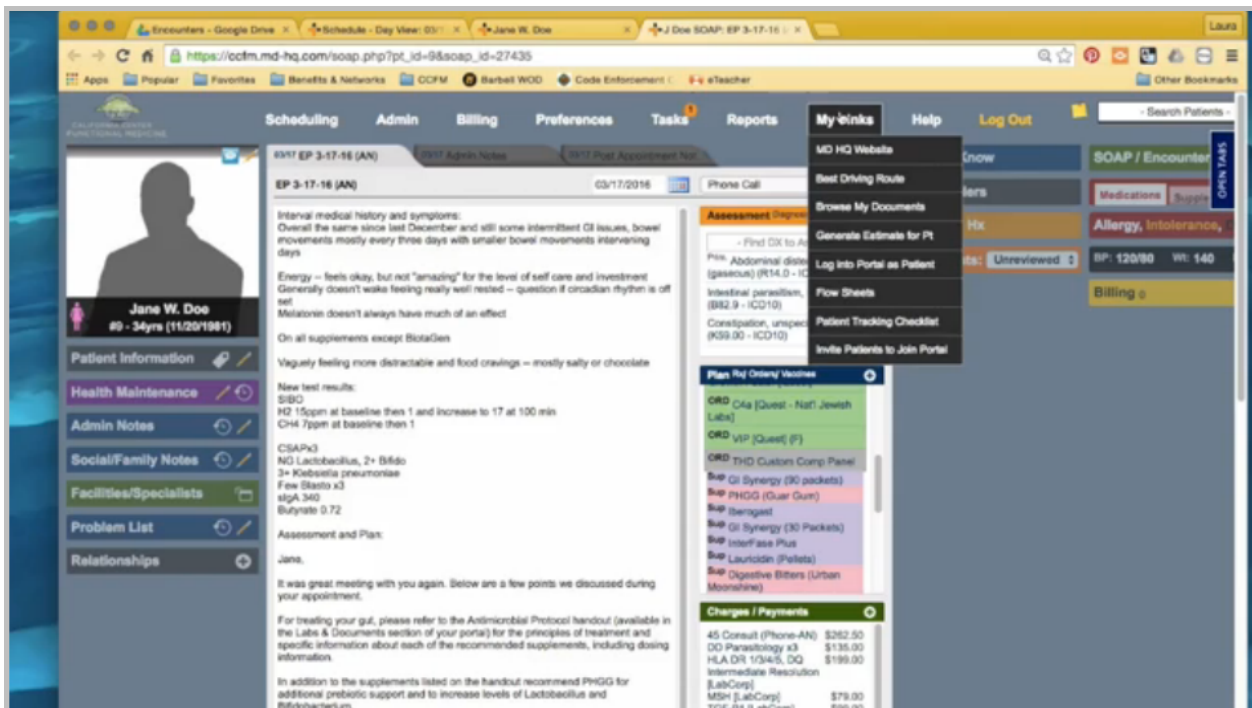
Address it to the patient. Paste my list of charges here. These should only be the items that are being sent to the patient, so I'll take off all the LabCorp testing, and I want to remove the dollar signs from all the supplements.



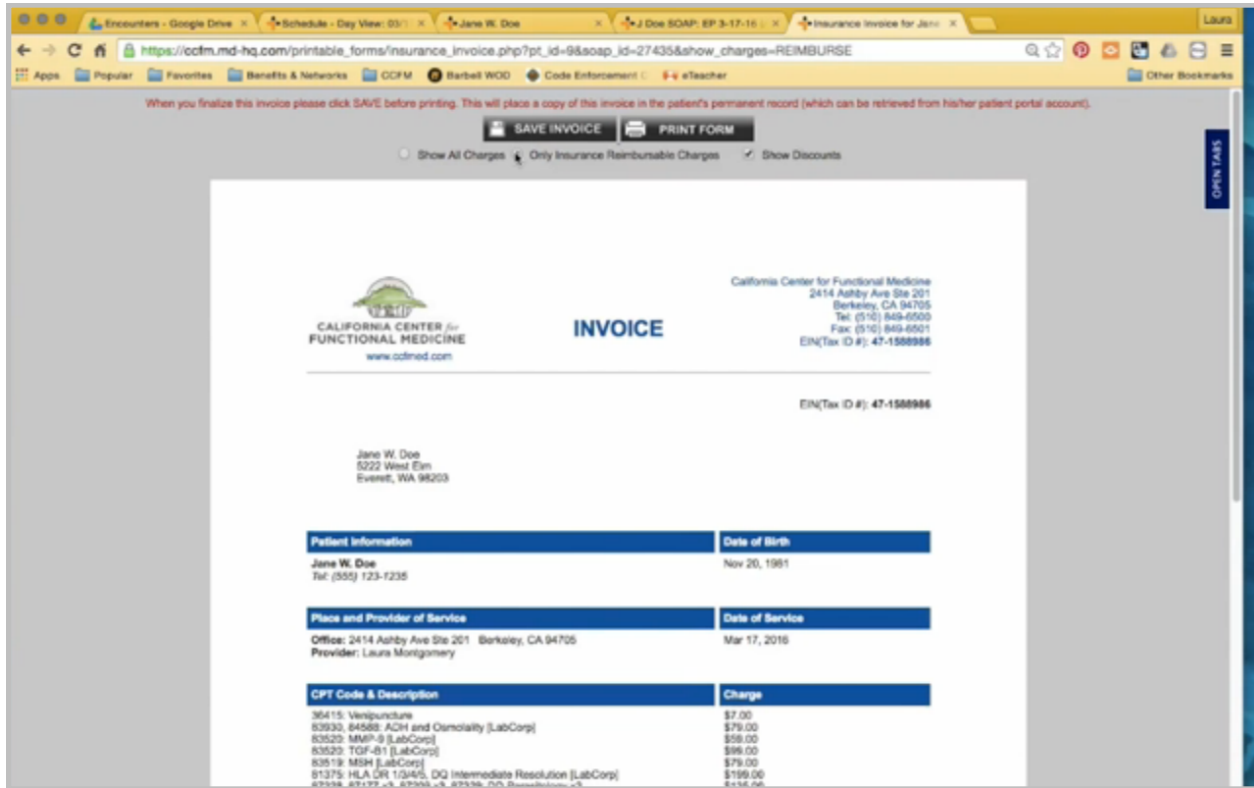
I also want to make a note that the self-pay test is a test kit that is coming to the patient, so I want to include that test on this list here. Then I'm going to go through and take out what doesn't apply. The patient did get supplements. She did have lab testing ordered. There are no self-order tests. She does need to print requisitions for LabCorp, Quest, and THD, and there will be an insurance invoice for her.



You can save and sign the note. I do want to send a message to the patient to let her know the note is here. Yes, it should be visible in the portal.



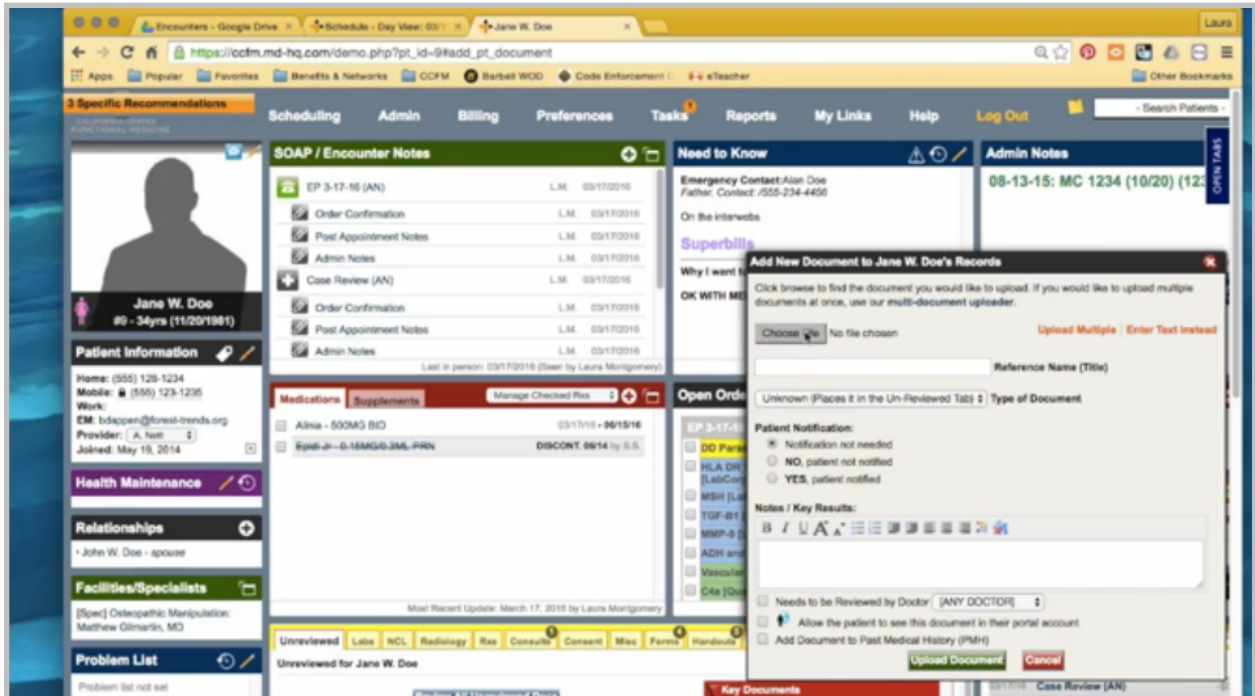
In the encounter, I will go up here to Reports. Generate insurance invoice. I want to mark it to only insurance reimbursable charges.



That removes the supplements. You can see because the note is unsigned. I'm listed as the provider because I'm the last person who saved the note, so I want to make sure that Amy is on here with her NPI number and her signature.

Typically, when this is done, it will say "paid in full" up here, and there won't be a balance remaining when the encounter has actually been paid for.

From here, I'm going to print the form. There is no way to save it directly to the chart. I'll put the date of service on the name of it.



Go back to the chart. Hit the plus sign to upload it. I'm going to put it in Invoices and make it visible to the patient. Now everything is done with this encounter, except the clinician needs to sign the note. I will task this to Amy and let her know to sign and mark the task as completed.