Estimate Additions

PURPOSE

1. Move encounters quickly and efficiently through the flow of the practice.
2. Provide information and documentation to patients so they have a clear understanding of what happens next and when.
3. Reduce number of errors and omissions.
4. Create continuity with labeling and processing.
5. Improve the quality of work within our clinic.

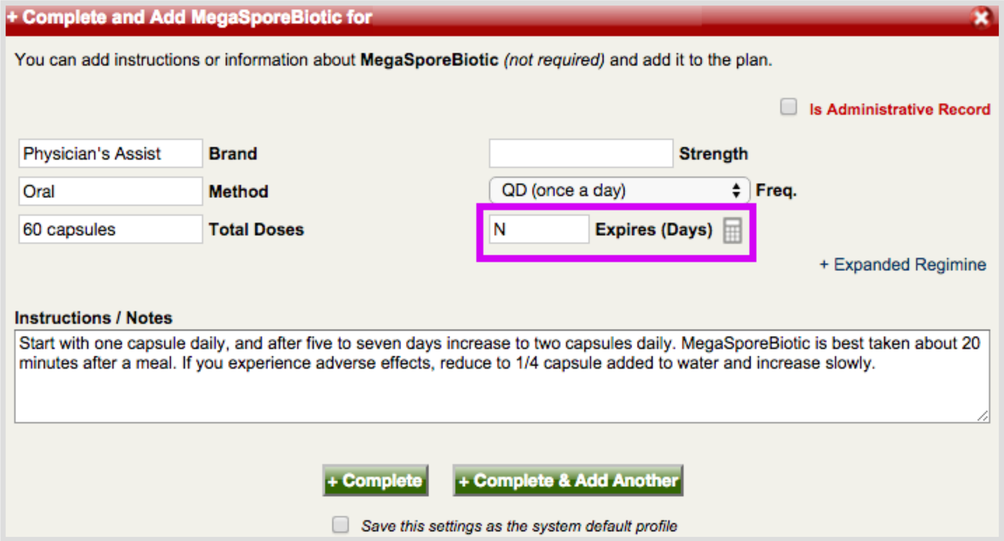
PROCEDURE

Expected time frame: Within 48 hours of when the patient sends a Secure Message to the PPQ.

Add a Supplement Refill

1. Open the patient's chart.
2. In the navy Admin Notes box, review the credit card information to ensure the card is not expired and there is a security code listed. If not, you will need to respond to the patient's message to obtain current card information. Reference **Update CC Info**)
3. Underneath the patient's picture, check the patient's age. If they are 65 or older, click on "consent" in the orange tabbed section at the bottom of the Patient Dashboard. Look to make sure there is a Medicare Opt-Out form. If not, send it to the patient. (Reference **Tag Questionnaires**)
4. In the green SOAP/Encounter Notes box, click on the open encounter.
5. In the navy Plan box, click the "+," then select "add supplement" to search and add the requested supplement(s).
6. Be sure to look in the "expires" field of the profile to see if approval is required ("Y") or not ("N") for each supplement.

If none of the supplements require clinician approval (example in the picture below):

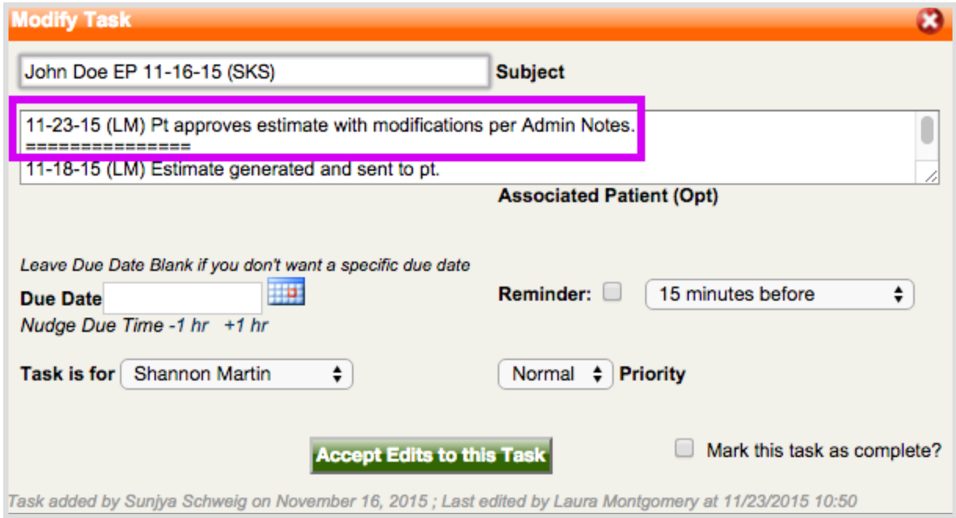


1. In the green Charges box, click "+" to add each supplement, changing the quantity as requested by patient.

   Note: Select the charge name that matches the Alternate Plan name from the Plan box exactly.

2. Save and close the note (do not "save & sign").
3. In the green SOAP/Encounter Notes box, click to open the Admin Notes of the encounter.
4. Put your date/initial stamp followed by: "Patient would like to add [list supplement(s)]. Does not require clinician approval." Save the note and close (do not "save & sign").
5. From the Patient Dashboard, hover on "tasks," then click "show patient's task and schedule history."
6. Open the task that matches the encounter. Put your date/initial stamp, followed by "Pt approves estimate with modifications per Admin Notes" then a line. Assign the task to the biller and click 

. Example below outlined in purple:



7. Close the patient's chart.

8. In the PPQ, click  to respond to the patient with one of the following messages:

Labs AND supplements ordered:

Hi [patient name],

We received your modified estimate approval and will be in touch with detailed lab instructions when the order is on its way. Once available, this information will be in your Encounter History in your Patient Portal. Thank you!

[your signature]

Labs only ordered:

Hi [patient name],

We received your modified estimate approval and will be in touch with detailed lab instructions when the order is on its way. Once available, this information will be in your Encounter History in your Patient Portal. Thank you!

[your signature]

Supplements only ordered:

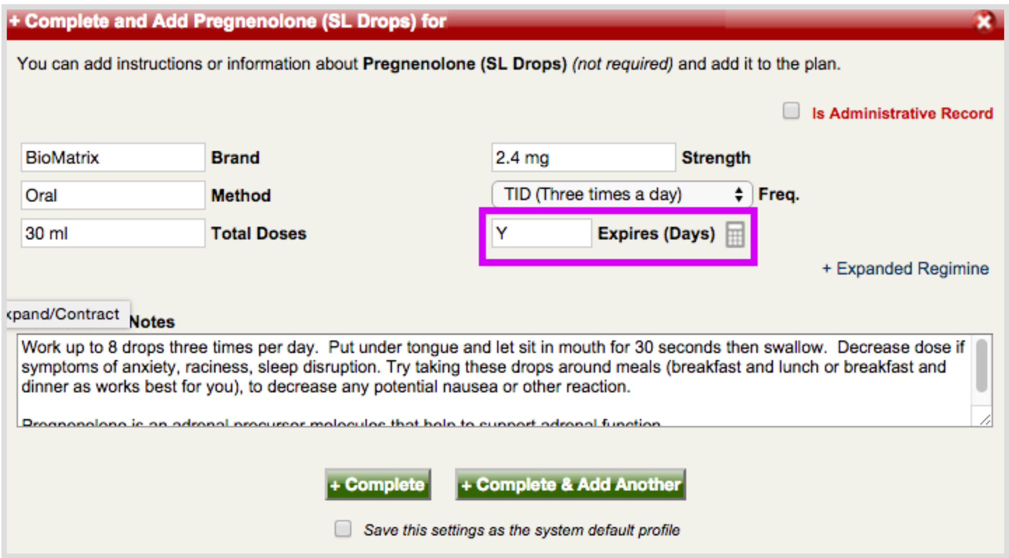
Hi [patient name],

We received your modified estimate approval and will be in touch when the order is on its way. Once available, this information will be in your Encounter History in your Patient Portal. Thank you!

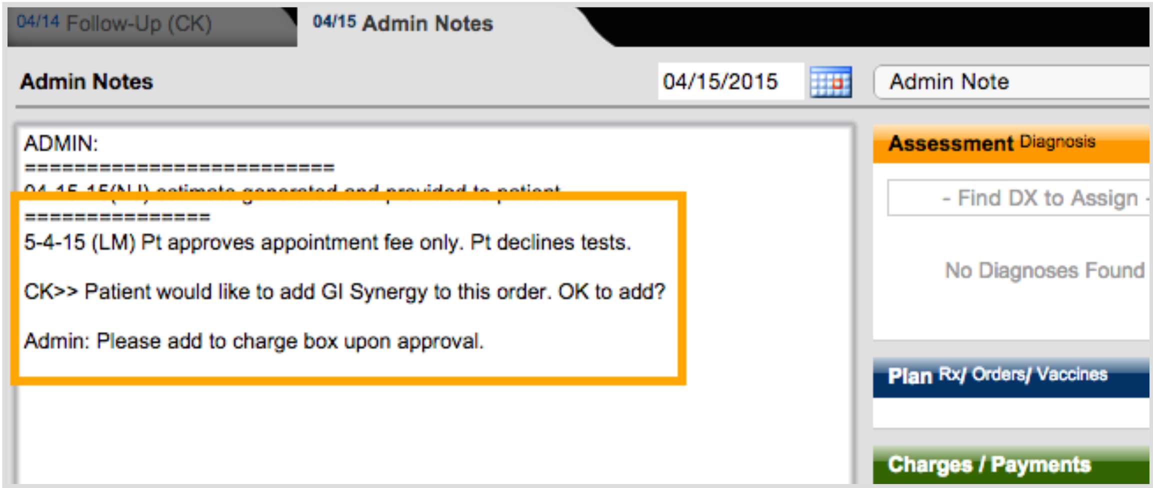
[your signature]

9. This is now complete. The next step in processing the encounter will be when you receive the task back from the clinician. At that time, go to the appropriate Process Appointment Encounter WP and follow the “Finalize the Encounter” bottom procedure to continue processing the encounter like normal.

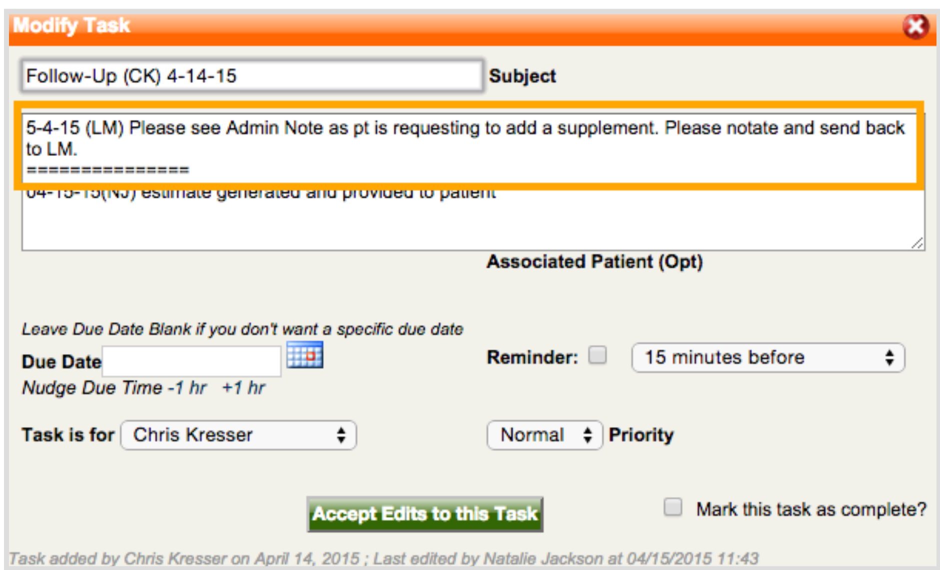
IF ANY OF THE SUPPLEMENTS REQUIRE CLINICIAN APPROVAL (EXAMPLE IN THE PICTURE BELOW):



1. Save and close the note (do not “save & sign”).
2. In the green SOAP/Encounter Notes box, click to open the Admin Notes of the encounter.
3. Put a line and your date/initial stamp, followed by “Pt approves estimate.” Enter down to skip a line, put the clinician’s initials, then “>> Patient would like to add [name of supplement] to this order. OK to add per plan box in encounter?” Enter down to skip a line, then add “ADMIN: Please add to charges box upon approval,” then save the note. Example below outlined in orange:



4. From the Patient Dashboard, hover on "tasks," then click "show patient's task and schedule history."
5. Open the task that matches this encounter. Put your date/initial stamp, followed by "Please see Admin Note as pt is requesting to add a supplement. Please notate and send back to [your initials]. Please do not sign Admin Note" then a line. Assign the task to the clinician and click **Accept Edits to this Task**. Example below outlined in orange:



6. In the PPQ, click  to respond to the patient with one of the following messages:

Labs AND supplements ordered:

Hi [patient name],

We received your modified estimate approval and will be in touch with detailed lab instructions when the order is on its way. Once available, this information will be in your Encounter History in your Patient Portal. Thank you!

[your signature]

Labs only ordered:

Hi [patient name],

We received your modified estimate approval and will be in touch with detailed lab instructions when the order is on its way. Once available, this information will be in your Encounter History in your Patient Portal. Thank you!

[your signature]

Supplements only ordered:

Hi [patient name],

We received your modified estimate approval and will be in touch when the order is on its way. Once available, this information will be in your Encounter History in your Patient Portal. Thank you!

[your signature]

7. Once you receive the task back from the clinician:

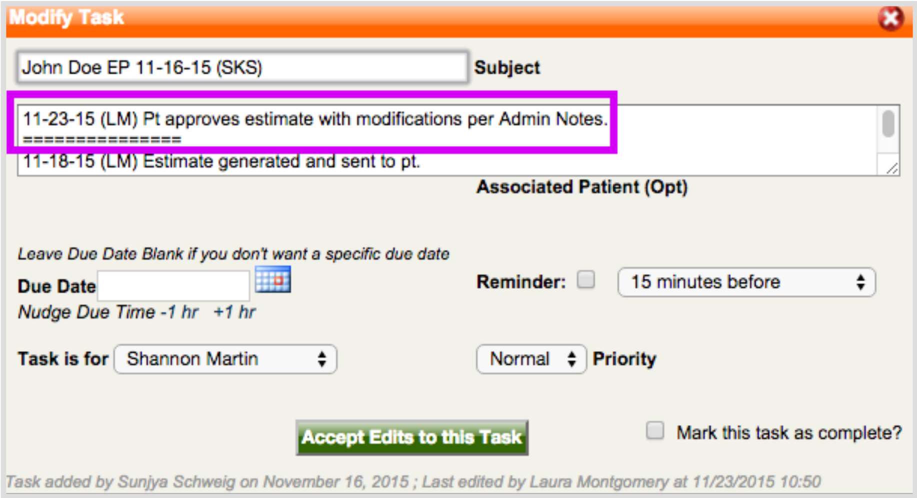
   7.1 If not approved, please skip to the bottom section for Addition Denials by Clinician.

   7.2 If approved, open the patient's chart. In the green SOAP/Encounter Notes box, click to open the encounter. Click "+" to add each additional supplement to the green Charges box, changing the quantity as requested by patient.

   Note: Select the charge name that matches the Alternate Plan name from the Plan box exactly.

8. Save and close the note (do not "save & sign").
9. In the green SOAP/Encounter Notes box, click to open the Admin Notes of the encounter.
10. Put your date/initial stamp followed by: "Ready to charge per encounter" Save the note and close (do not "save & sign").

11. From the Patient Dashboard, hover on “tasks” then click “show patient’s task and schedule history.”
12. Open the task that matches the encounter. Put your date/initial stamp, followed by “Pt approves estimate with modifications per Admin Notes,” then a line. Assign the task to the biller and click Accept Edits to this Task. Example below outlined in purple:

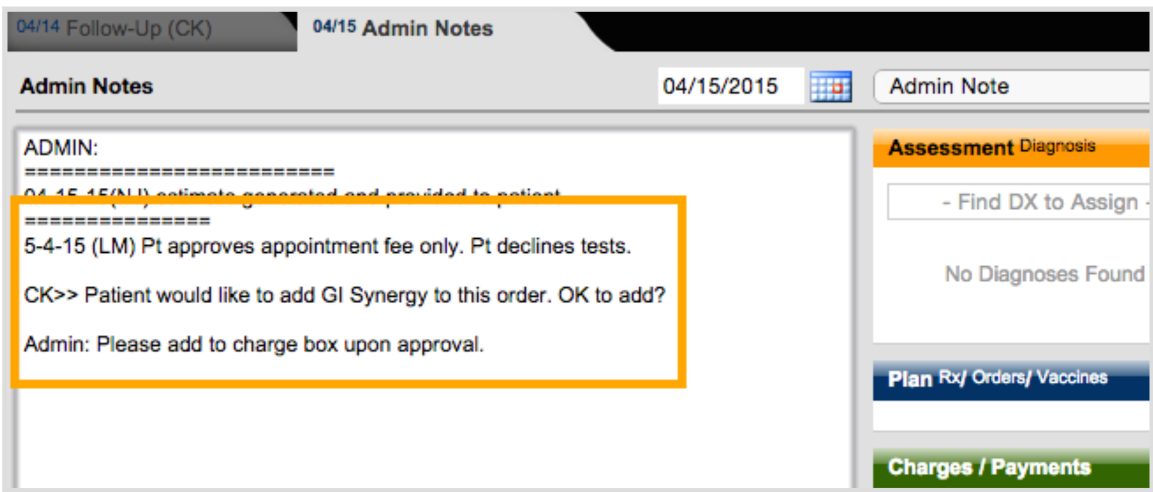


13. This is now complete. The next step in processing the encounter will be when you receive the task back from the clinician. At that time, go to the appropriate Process Appointment Encounter WP and follow the “Finalize the Encounter” bottom procedure to continue processing the encounter like normal.

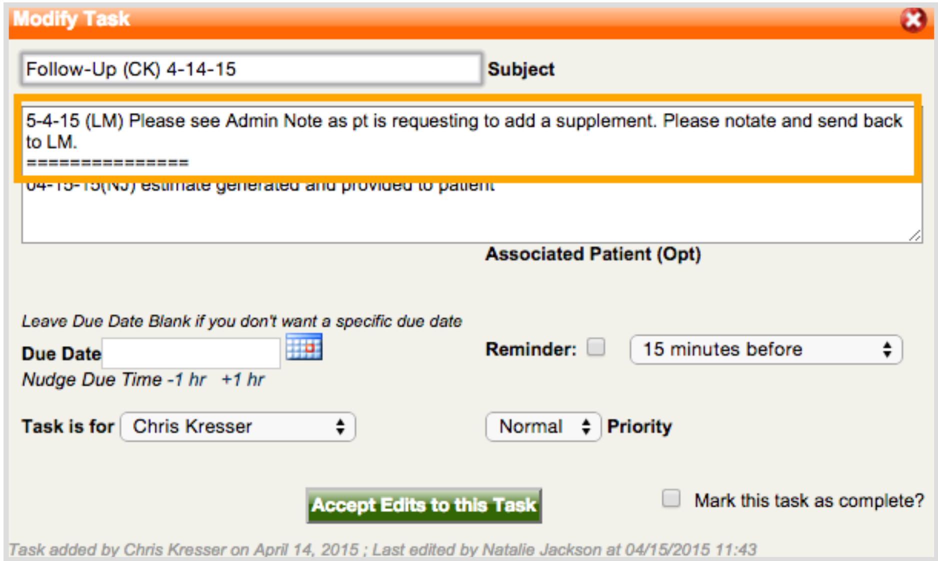
Add a New Supplement the Pt Named

1. Open the patient’s chart.
2. In the navy Admin Notes box, review the credit card information to ensure the card is not expired and there is a security code listed. If not, you will need to respond to the patient’s message to obtain current card information. (Reference **Update CC Info**)
3. Underneath the patient’s picture, check the patient’s age. If they are 65 or older, click on “consent” in the orange tabbed section at the bottom of the Patient Dashboard. Look to make sure there is a Medicare Opt-Out form. If not, send it to the patient. (Reference **Tag Questionnaires**)
4. In the green SOAP/Encounter Notes box, click on the open encounter.

5. In the navy Plan box, click the "+" then select "add supplement" to search and add the requested supplement(s).
6. Save and close the note (do not "save & sign").
7. In the green SOAP/Encounter Notes box, click to open the Admin Notes of the encounter.
8. Because this is a supplement that the patient has never taken before, you need to seek clinician approval regardless of whether approval is needed for a refill or not. Put a line and your date/initial stamp, followed by "Pt approves estimate." Enter down to skip a line, put the clinician's initials, then ">> Patient would like to add [name of supplement] to this order. OK to add per plan box in encounter?" Enter down to skip a line, then add "ADMIN: Please add to charges box upon approval," then save the note. Example below outlined in orange:



9. From the Patient Dashboard, hover on "tasks," then click "show patient's task and schedule history."
10. Open the task that matches this encounter. Put your date/initial stamp, followed by "Please see Admin Note as pt is requesting to add a supplement. Please notate and send back to [your initials]. Please do not sign Admin Note" then a line. Assign the task to the clinician and click **Accept Edits to this Task**. Example below outlined in orange:



11. In the PPQ, click  to respond to the patient with the following message:

    Hi [patient first name],

    The price for the supplement is $[xxx] (without applicable tax and shipping). Please respond to confirm that you approve of this addition to your order.

    Thank you,
    [Your first name]

12. Once you receive the task back from the clinician:

    12.1 If not approved, please skip to the bottom section for Addition Denials by Clinician.

    12.2 If approved, open the patient's chart. In the green SOAP/Encounter Notes box, click to open the encounter. Click "+" to add each additional supplement to the green Charges box, changing the quantity as requested by patient.

    Note: Select the charge name that matches the Alternate Plan name from the Plan box exactly.

13. Save and close the note (do not "save & sign").

14. In the green SOAP/Encounter Notes box, click to open the Admin Notes of the encounter.

    14.1 **If the patient has responded to approve the price**, please proceed to step #15.

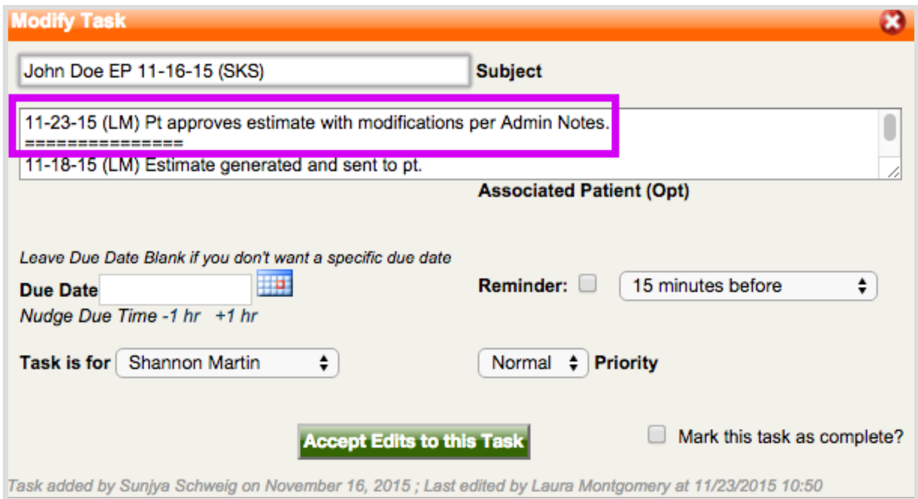
    14.2 **If the patient has responded to deny the price**, please skip to the bottom section for Addition Denials by Patient.

    14.3 **If the patient has not responded**, put your date/initial stamp followed by "supp added to charge box. Holding for pt price approval." Update the task of this encounter with this same message.

15. Put your date/initial stamp followed by: “Ready to charge per encounter.” Save the note and close (do not “save & sign”).

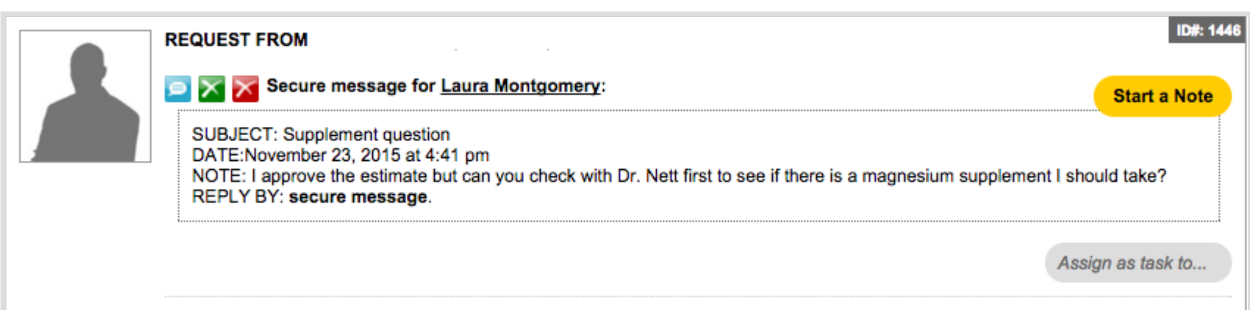
16. From the Patient Dashboard, hover on “tasks,” then click “show patient’s task and schedule history.”

17. Open the task that matches the encounter. Put your date/initial stamp, followed by “Pt approves estimate with modifications per Admin Notes” then a line. Assign the task to Shannon and click **Accept Edits to this Task**. Example below outlined in purple:



18. This is now complete, and the next step in processing the encounter will be when you receive the task back from the clinician. At that time, go to the appropriate Process Appointment Encounter WP and follow the “Finalize the Encounter” bottom procedure to continue processing the encounter like normal.

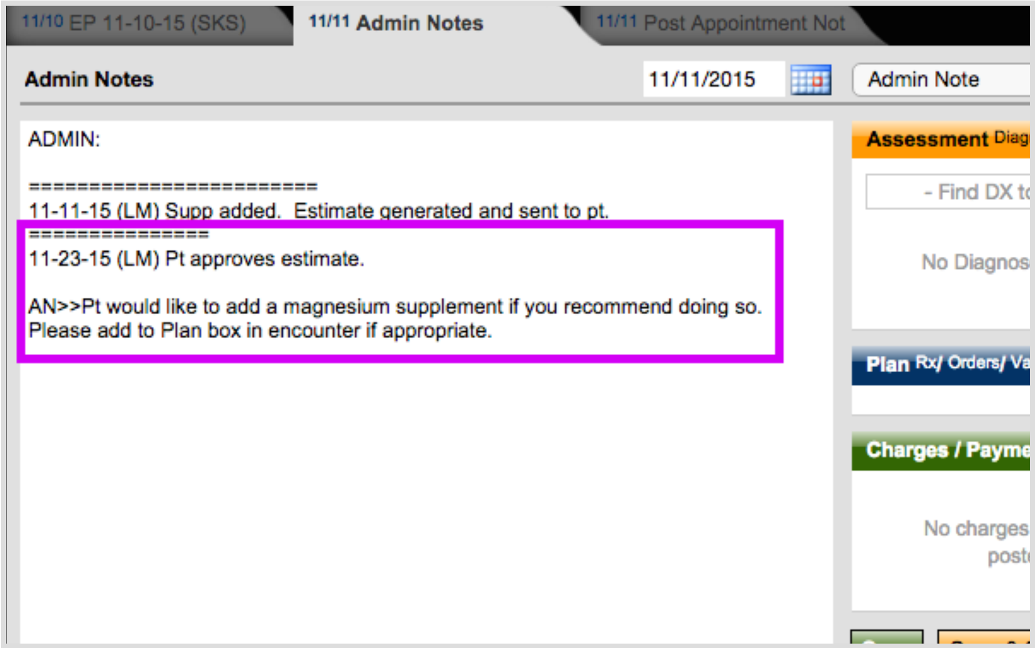
Add a New Supplement the Pt Did Not Name



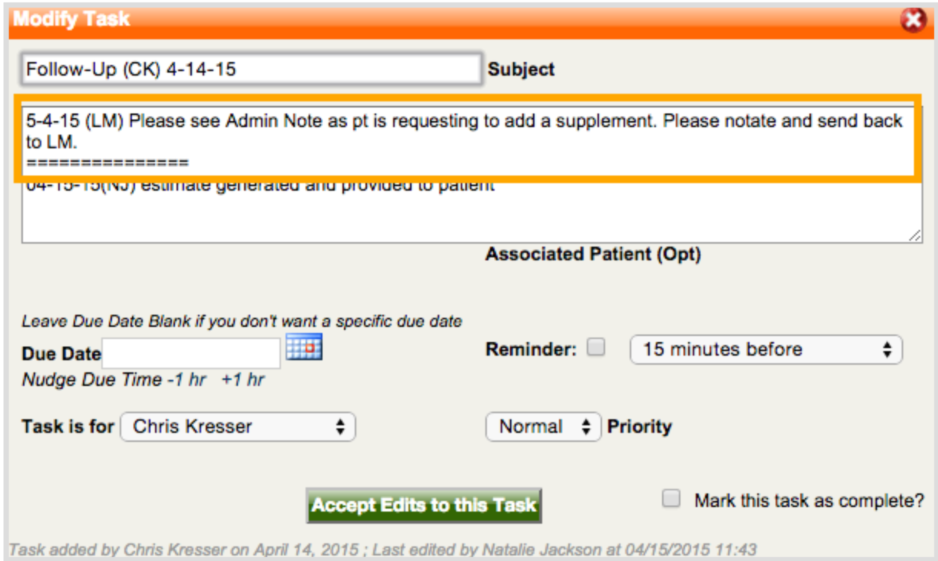
1. Open the patient’s chart.

2. In the navy Admin Notes box, review the credit card information to ensure the card is not expired and there is a security code listed. If not, you will need to respond to the patient’s message to obtain current card information. (Reference **Update CC Info**)

3. Underneath the patient's picture, check the patient's age. If they are 65 or older, click on "consent" in the orange tabbed section at the bottom of the Patient Dashboard. Look to make sure there is a Medicare Opt-Out form. If not, send it to the patient. (Reference **Tag Questionnaires**)
4. In the green SOAP/Encounter Notes box, click to open the Admin Notes of the encounter.
5. Put a line and your date/initial stamp, followed by "Pt approves estimate." Enter down to skip a line, put the clinician's initials then ">> Patient would like to add [supplement request]. Please add to Plan box in encounter if appropriate." Enter down to skip a line. Example below outlined in purple:



6. Save and close the note.
7. From the Patient Dashboard, hover on "tasks," then click "show patient's task and schedule history."
8. Open the task that matches this encounter. Put your date/initial stamp, followed by "Please see Admin Note as pt is requesting to add a supplement. Please notate and send back to [your initials]. Please do not sign Admin Note," then a line. Assign the task to the clinician and click **Accept Edits to this Task**. Example below outlined in orange:



9. In the PPQ, click to respond to the patient with the following message:

   Hi [patient first name],

   I will check with [clinician name] about the supplement for you and send a follow-up message shortly with [his/her] response.

   Thank you,
   [Your first name]

10. Once you receive the task back from the clinician:

    10.1 If not approved, please skip to the bottom section for Addition Denials by Clinician.

    10.2 If approved, please continue to the next step.

11. Open the patient's chart. In the green SOAP/Encounter Notes box, click to open the encounter.
12. Click "+" to add each additional supplement to the green Charges box, changing the quantity as requested by patient.

    Note: Select the charge name that matches the Alternate Plan name from the Plan box exactly.

13. Save and close the note (do not "save & sign").

14. From the patient dashboard, click to respond to the patient with the following message:

    Hi [patient first name],

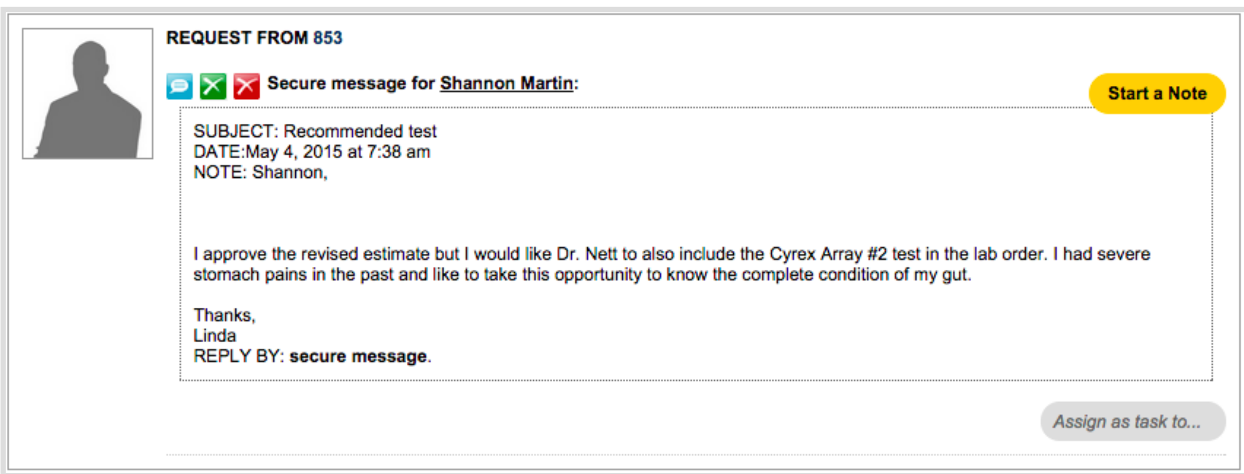
    The price for the supplement is $[xxx] (without applicable tax and shipping). Please respond to confirm that you approve of this addition to your order.

    Thank you,

[Your first name]

15. In the green SOAP/Encounter Notes box, click to open the Admin Notes of the encounter.
16. Put your date/initial stamp followed by "supp added to charge box. Holding for pt price approval."
17. From the Patient Dashboard, hover on "tasks," then click "show patient's task and schedule history."
18. Open the task that matches the encounter. Put your date/initial stamp, followed by "Holding for pt price approval," then a line. Set the Due Date for one1 week from today. DO NOT set a reminder.
19. Leave the task assigned to yourself and click **Accept Edits to this Task**.
20. This is now complete. The next step in processing the encounter will be when you receive the task back from the clinician. At that time, go to the appropriate Process Appointment Encounter WP and follow the "Finalize the Encounter" bottom procedure to continue processing the encounter like normal.

Add a Test the Pt Named


REQUEST FROM 853

Secure message for Shannon Martin:

Start a Note

SUBJECT: Recommended test
DATE:May 4, 2015 at 7:38 am
NOTE: Shannon,

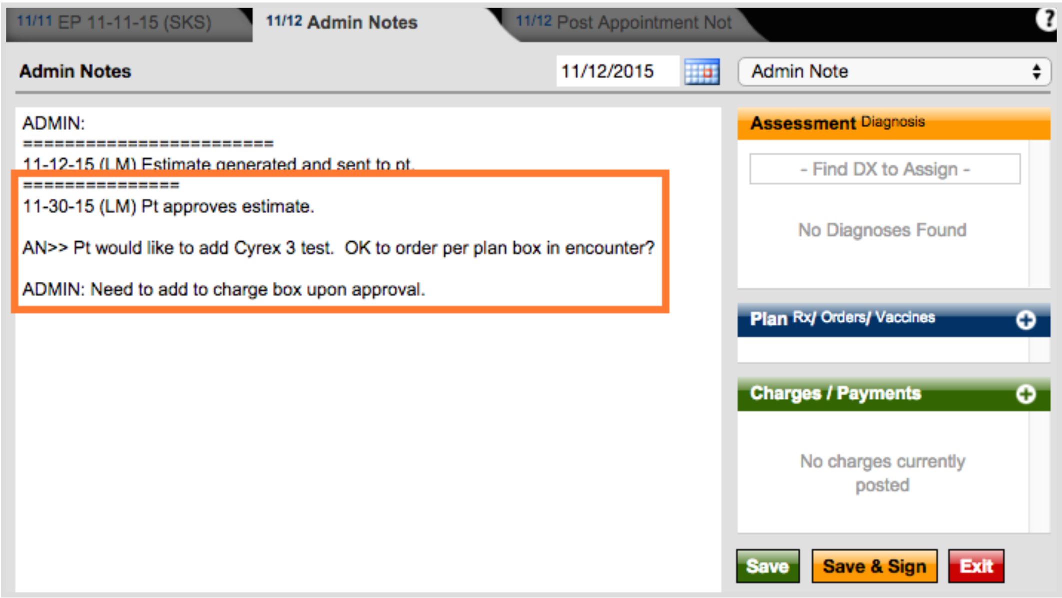
I approve the revised estimate but I would like Dr. Nett to also include the Cyrex Array #2 test in the lab order. I had severe stomach pains in the past and like to take this opportunity to know the complete condition of my gut.

Thanks,
Linda
REPLY BY: **secure message**.

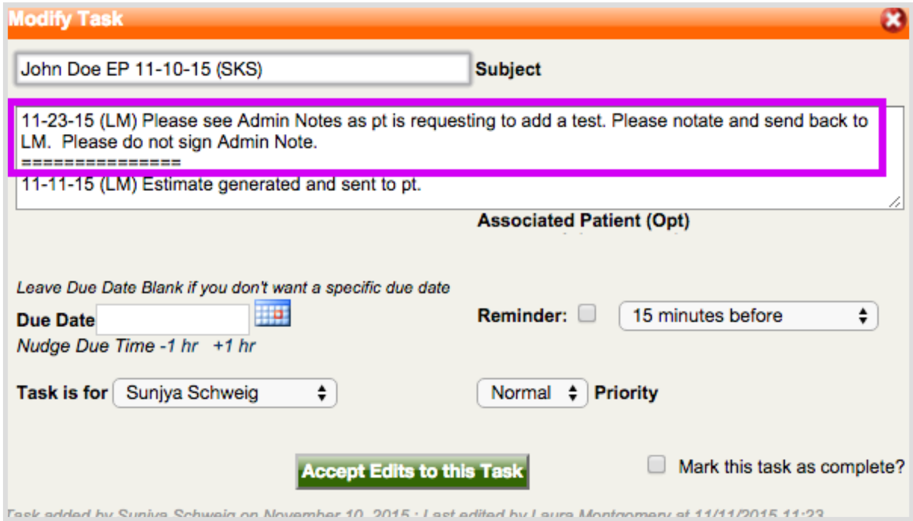
Assign as task to...

1. Open the patient's chart.
2. In the navy Admin Notes box, review the credit card information to ensure the card is not expired and there is a security code listed. If not, you will need to respond to the patient's message to obtain current card information. (Reference **Update CC Info**)
3. Underneath the patient's picture, check the patient's age. If they are 65 or older, click on "consent" in the orange tabbed section at the bottom of the Patient Dashboard. Look to make sure there is a Medicare Opt-Out form. If not, send it to the patient. (Reference **Tag Questionnaires**)
4. In the green SOAP/Encounter Notes box, click on the open encounter.

5. In the navy Plan box, click the "+," then select "add/schedule orders" to search and add the requested test(s).
6. Save and close the note (do not "save & sign").
7. In the green SOAP/Encounter Notes box, click to open the Admin Notes of the encounter.
8. Put a line and your date/initial stamp, followed by "Pt approves estimate." Enter down to skip a line, put the clinician's initials, and then ">> Patient would like to add [name of test] to this order. OK to add per plan box in encounter?" Enter down to skip a line, then add "ADMIN: Please add to charge box upon approval," then save the note. Example below outlined in orange:



9. From the Patient Dashboard, hover on "tasks," then click "show patient's task and schedule history."
10. Open the task that matches this encounter. Put your date/initial stamp, followed by "Please see Admin Note as pt is requesting to add a test. Please notate and send back to [your initials]. Please do not sign Admin Note," then a line. Assign the task to the clinician and click **Accept Edits to this Task**. Example below outlined in purple:



11. In the PPQ, click  to respond to the patient with the following message:

    Hi [patient first name],

    The price for the test is $[xxx] (without applicable tax and shipping). Please respond to confirm that you approve of this addition to your order.

    Thank you,
    [Your first name]

12. Once you receive the task back from the clinician:

    12.1 If not approved, please skip to the bottom section for Addition Denials by Clinician.

    12.2 If approved, open the patient's chart. In the green SOAP/Encounter Notes box, click to open the encounter. Click "+" to add each additional test to the green Charges box if needed.

    Notes:

    - Plan Box items that are pink, gray, or green will not be added to the Charge Box.
    - Blue items are added only for AN and CK, and when requested (in the admin notes) by SS.
    - After adding all the blue items, you must also add a charge for "venipuncture."

      Note: when adding the CR Blood Panel, you do not add a venipuncture charge, as it is included in the charge for this test.

    - The item's name in the Charge box will match exactly how its name appears in the Plan Box.

13. Save and close the note (do not "save & sign").

14. In the green SOAP/Encounter Notes box, click to open the Admin Notes of the encounter.

    14.1 **If the patient has responded to approve of the price**, please proceed to step #15.

14.2 **If the patient has responded to deny the price**, please skip to the bottom section for Addition Denials by Patient.

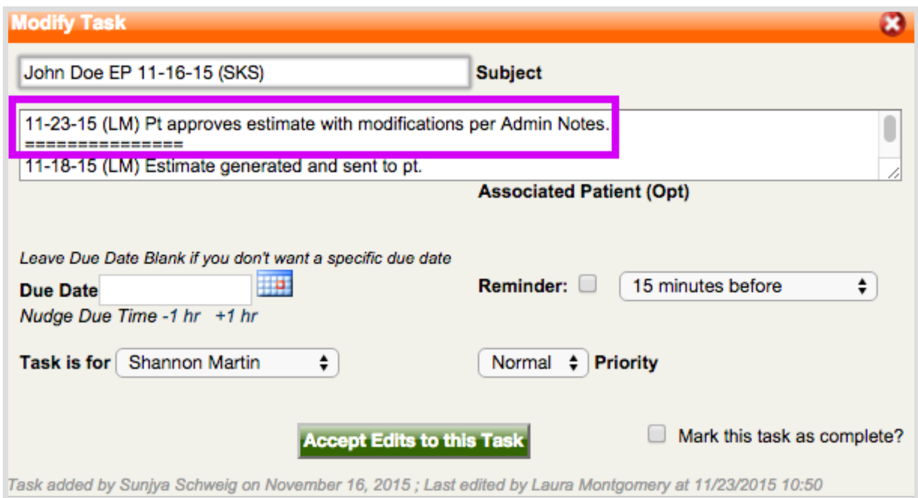
14.3 **If the patient has not responded**, put your date/initial stamp followed by "supp added to charge box. Holding for pt price approval." Update the task of this encounter with this same message.

15. Put your date/initial stamp followed by: "Ready to charge per encounter." Save the note and close (do not "save & sign").

16. From the Patient Dashboard, hover on "tasks," then click "show patient's task and schedule history."

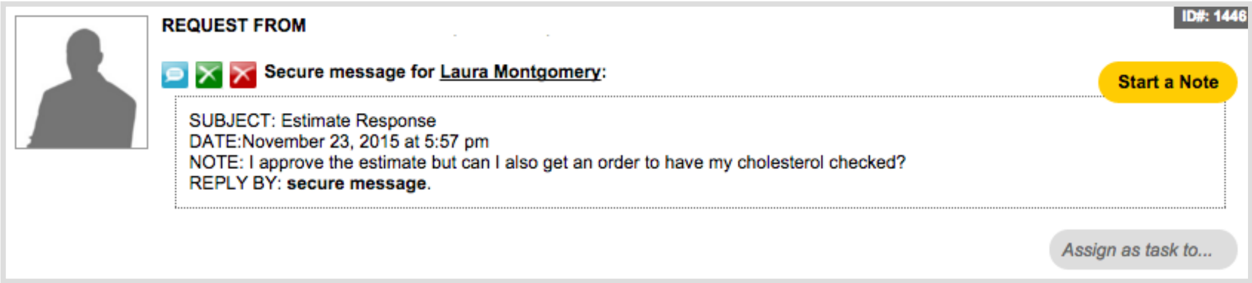
17. Open the task that matches the encounter. Put your date/initial stamp, followed by "Pt approves estimate with modifications per Admin Notes," then a line. Assign the task to Shannon and click 

. Example below outlined in purple:

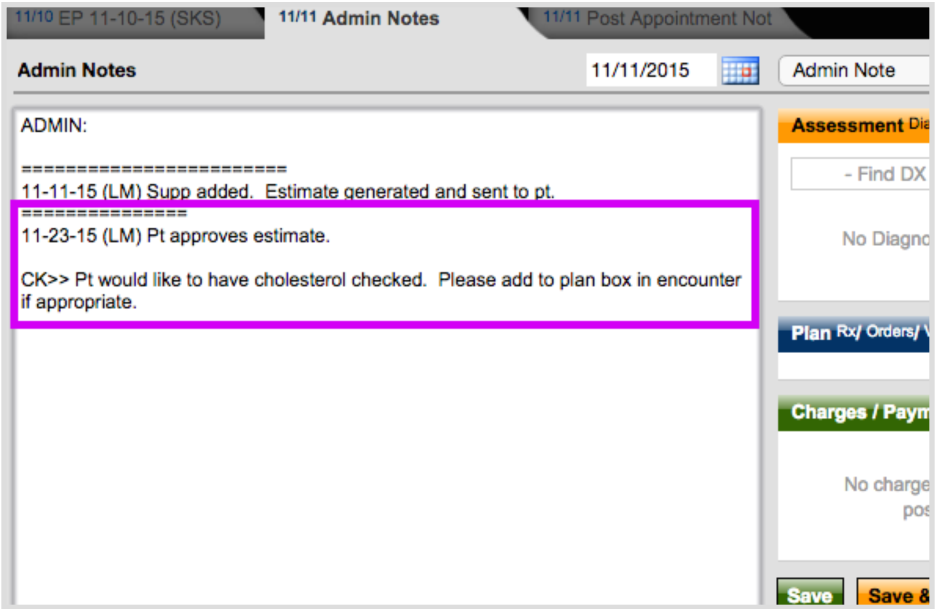


18. This is now complete, and the next step in processing the encounter will be when you receive the task back from the clinician. At that time, go to the appropriate Process Appointment Encounter WP and follow the "Finalize the Encounter" bottom procedure to continue processing the encounter like normal.

Add a Test the Pt Did Not Name

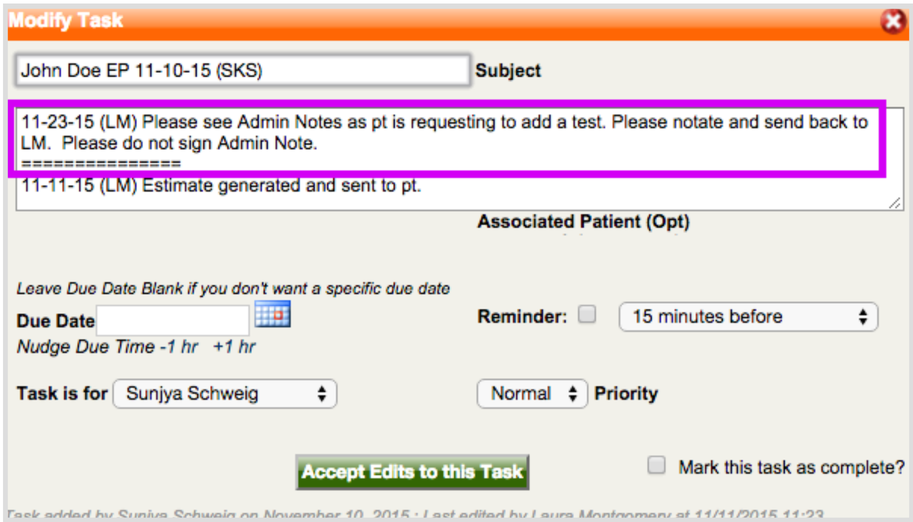


1. Open the patient's chart.
2. In the navy Admin Notes box, review the credit card information to ensure the card is not expired and there is a security code listed. If not, you will need to respond to the patient's message to obtain current card information. (Reference **Update CC Info**)
3. Underneath the patient's picture, check the patient's age. If they are 65 or older, click on "consent" in the orange tabbed section at the bottom of the Patient Dashboard. Look to make sure there is a Medicare Opt-Out form. If not, send it to the patient. (Reference **Tag Questionnaires**)
4. In the green SOAP/Encounter Notes box, click to open the Admin Notes of the encounter.
5. Put a line and your date/initial stamp, followed by "Pt approves estimate." Enter down to skip a line, then put the clinician's initials then ">> Patient would like to add [test request]. Please add to Plan box in encounter if appropriate." Enter down to skip a line. Example below outlined in purple:



6. Save and close the note.
7. From the Patient Dashboard, hover on "tasks," then click "show patient's task and schedule history."

8. Open the task that matches this encounter. Put your date/initial stamp, followed by "Please see Admin Note as pt is requesting to add a test. Please notate and send back to [your initials]. Please do not sign Admin Note," then a line. Assign the task to the clinician and click **Accept Edits to this Task**. Example below outlined in purple:



9. In the PPQ, click to respond to the patient with the following message:

   Hi [patient first name],

   I will check with [clinician name] about the test for you and send a follow-up message shortly with [his/her] response.

   Thank you,
   [Your first name]

10. Once you receive the task back from the clinician:

    10.1 **If not approved**, please skip to the bottom section for Addition Denials by Clinician.

    10.2 **If approved**, please continue to the next step.

11. Open the patient's chart. In the green SOAP/Encounter Notes box, click to open the encounter.
12. Click "+" to add each additional test to the green Charges box if needed.

    Notes:

    - Plan Box items that are pink, gray, or green will not be added to the Charges box.
    - Blue items are added only for AN and CK, and when requested (in the admin notes) by SS.
    - After adding all the blue items, you must also add a charge for "venipuncture."

Note: when adding the CR Blood Panel, you do not add a venipuncture charge, as it is included in the charge for this test.

- The item's name in the Charges box will match exactly how its name appears in the Plan Box.

13. Save and close the note (do not "save & sign").

14. From the patient dashboard, click  to respond to the patient with the following message:

    Hi [patient first name],

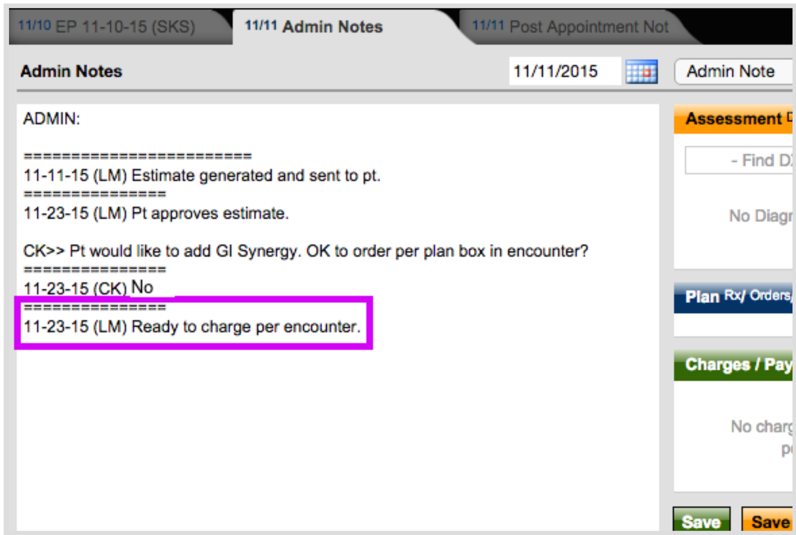
    The price for the test is $[xxx] (without applicable tax and shipping). Please respond to confirm that you approve of this addition to your order.

    Thank you,
    [Your first name]

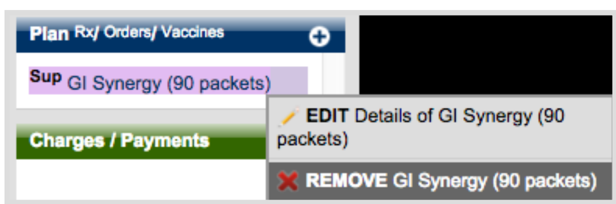
15. In the green SOAP/Encounter Notes box, click to open the Admin Notes of the encounter.
16. Put your date/initial stamp followed by "test added to charge box. Holding for pt price approval."
17. From the Patient Dashboard, hover on "tasks," then click "show patient's task and schedule history."
18. Open the task that matches the encounter. Put your date/initial stamp, followed by "Holding for pt price approval," then a line. Set the Due Date for one week from today. DO NOT set a reminder.
19. Leave the task assigned to yourself and click 
.
20. This is now complete, and the next step in processing the encounter will be when you receive the task back from the clinician. At that time, go to the appropriate Process Appointment Encounter WP and follow the "Finalize the Encounter" bottom procedure to continue processing the encounter like normal.

Addition Denials by Clinician

1. If the clinician denies a supplement request, send a message to the patient explaining this. (Reference **Send Messages**)
2. From the patient dashboard, in the green SOAP/Encounter Notes box, click to open the Admin Notes for the encounter.
3. Draw a line, then put your date/initial stamp and "ready to charge per encounter." Example below, outlined in purple:

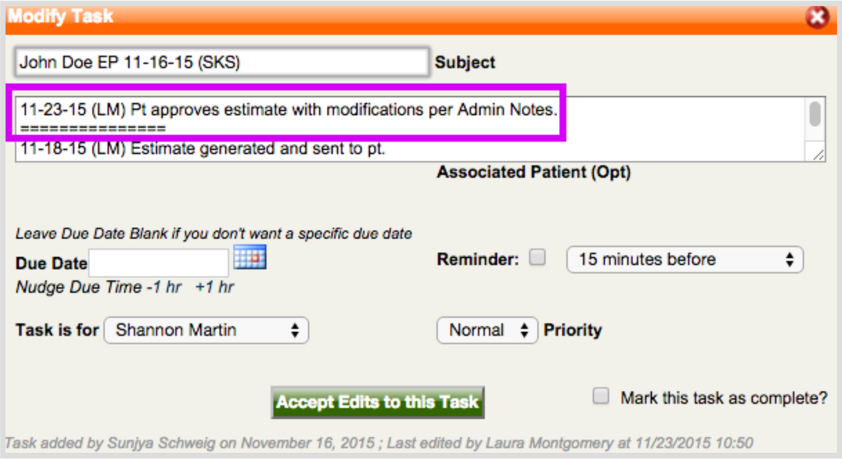


4. Save and close the note.
5. In the green SOAP/Encounter Notes box, click to open the encounter.
6. In the Plan box, right-click and remove the supplement.



7. From the Patient Dashboard, hover on "tasks," then click "show patient's task and schedule history."

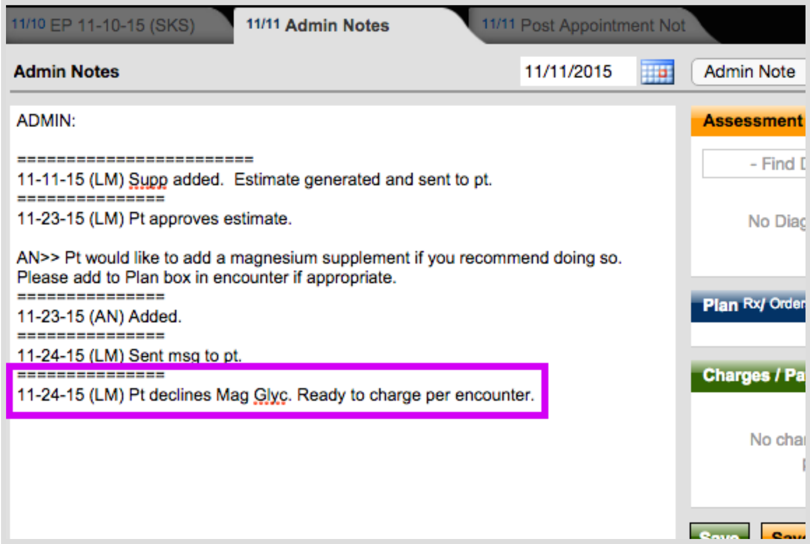
8. Open the task that matches the encounter. Put your date/initial stamp, followed by "Pt approves estimate with modifications per Admin Notes," then a line. Assign the task to Shannon and click Accept Edits to this Task. Example below outlined in purple:



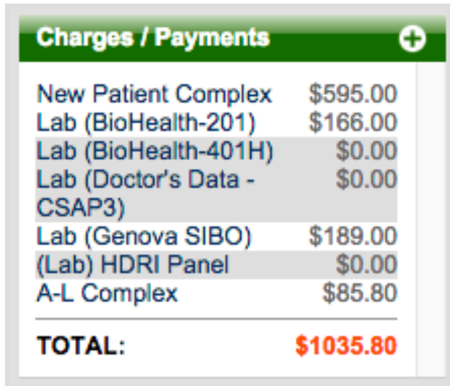
9. Close the patient's chart.
10. This is now complete, and the next step in processing the encounter will be when you receive the task back from the clinician. At that time, go to the appropriate Process Appointment Encounter WP and follow the "Finalize the Encounter" bottom procedure to continue processing the encounter like normal.

Addition Denials by Patient

1. From the patient dashboard, in the green SOAP/Encounter Notes box, click to open the Admin Notes for the encounter.
2. Draw a line, then put your date/initial stamp and "Pt declines [name of supp]. Ready to charge per encounter." Example below, outlined in purple:

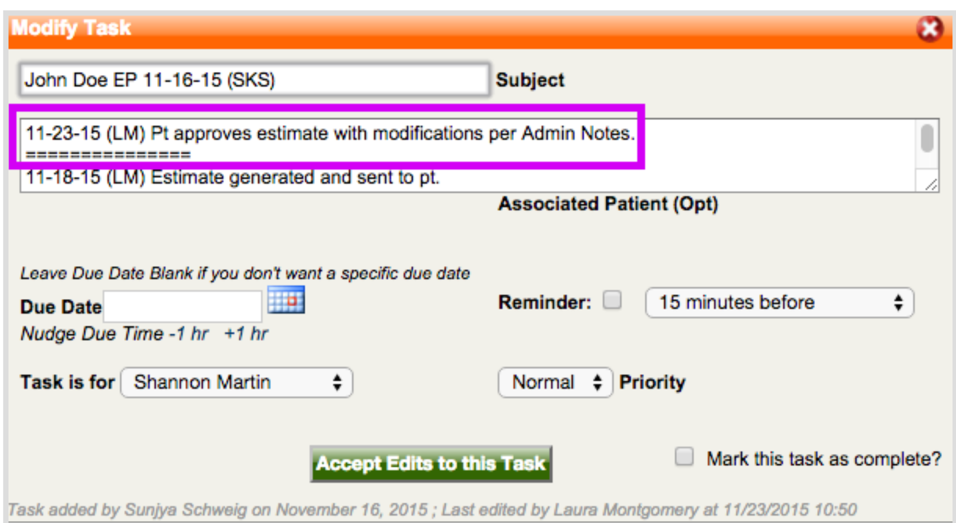


3. Save and close the note.
4. In the green SOAP/Encounter Notes box, click to open the encounter.
5. For each item the patient does not want, in the green Charges box, right-click on the item, choose “edit charge details,” and change the price of the item to $0.
6. Click “edit this charge.” Example below (*Note:* On the charge list, the charge will become grayed out):



Charges / Payments	
New Patient Complex	$595.00
Lab (BioHealth-201)	$166.00
Lab (BioHealth-401H)	$0.00
Lab (Doctor's Data - CSAP3)	$0.00
Lab (Genova SIBO)	$189.00
(Lab) HDRI Panel	$0.00
A-L Complex	$85.80
TOTAL:	**$1035.80**

7. If the patient is declining any tests, in the navy Plan box, right-click on each test that is being declined, choose “remove (pt will not fill)” and click “ok” to mark as abandoned.
8. Close the note.
9. From the Patient Dashboard, hover on “tasks,” then click “show patient’s task and schedule history.”
10. Open the task that matches the encounter. Put your date/initial stamp, followed by “Pt approves estimate with modifications per Admin Notes,” then a line. Assign the task to the biller and click **Accept Edits to this Task**. Example below outlined in purple:



11. Close the patient’s chart.

12. This is now complete, and the next step in processing the encounter will be when you receive the task back from the clinician. At that time, go to the appropriate Process Appointment Encounter WP and follow the “Finalize the Encounter” bottom procedure to continue processing the encounter like normal.