

# Estimate Modifications

## 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.*



**REQUEST FROM 854**

   **Secure message for Shannon Martin:** Start a Note

SUBJECT: Re: A document has been reviewed: Estimate for  
 DATE: April 30, 2015 at 8:44 pm  
 NOTE: I'd like to do the following, please:

Adrenal Stress Profile  
 SIBO breath test  
 A-L complex

Please use the credit card on file.

REPLY BY: **secure message.**

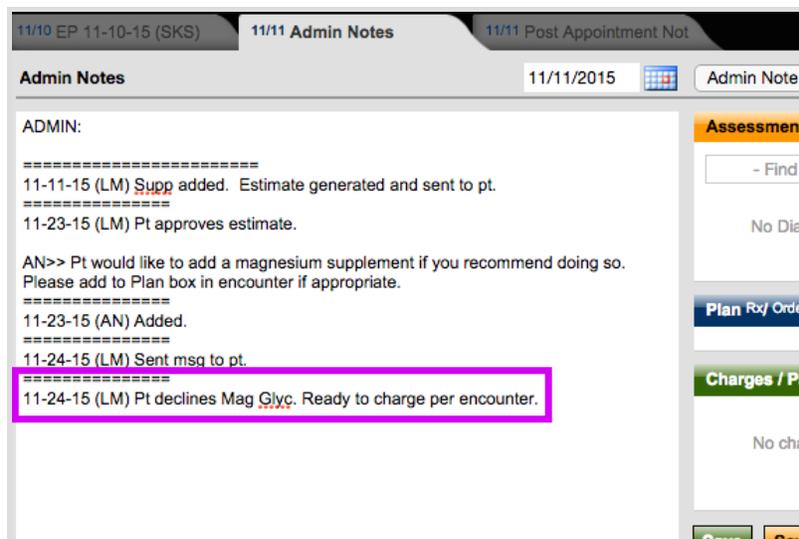
 ...Show complete message thread

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. 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
<b>TOTAL:</b>	<b>\$1035.80</b>

- If the patient is declining any test, 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.
- Close the note.
- In the green SOAP/Encounter Notes box, click to open the Admin Notes for the encounter.
- Draw a line, then put your date/initial stamp and "Pt declines [name of supps/tests]. Ready to charge per encounter." Example below outlined in purple:



11/10 EP 11-10-15 (SKS)    11/11 Admin Notes    11/11 Post Appointment Not

**Admin Notes**    11/11/2015    Admin Note

ADMIN:

=====

11-11-15 (LM) Supp added. Estimate generated and sent to pt.  
 =====

11-23-15 (LM) Pt approves estimate.

AN>> Pt would like to add a magnesium supplement if you recommend doing so.  
 Please add to Plan box in encounter if appropriate.  
 =====

11-23-15 (AN) Added.  
 =====

11-24-15 (LM) Sent msg to pt.  
 =====

11-24-15 (LM) Pt declines Mag Glyc. Ready to charge per encounter.

Assessment  
 - Find I  
 No Diag

Plan Rx/ Order

Charges / Pa  
 No cha

Save    Save

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

13. 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:

14. Close the patient’s chart.

15. 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]