

Updated Login page

The **Add login link to your web site** hyperlink has been removed. Launch Client button has also been removed as it is no longer needed to access PA Client. Instead, from your Windows Start Menu, under All Programs in the PA folder, click on the file named PA Client (ATL) to access PA Client.

The **Create Desktop Shortcut** hyperlink is now available at the Login screen. This hyperlink will produce an Internet Explorer shortcut pointing to the current Login page on the desktop of the current Windows user, when authorized. The shortcut will be named PracticeAdmin Login.

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-	
This agreement applies to ALL	٠
PracticeAdmin.com web site users. By	
Clicking on the "Login" button below to gain	
access to Practice Administrator™, you agree	
to the following: To be bound by the terms	
and conditions of use of this website, and to	
the terms of the Website Subscriber agreement.	-

By clicking on 'Login' you are indicating that you accept the terms of the login agreement above

Username :	
Password:	
Organization ID:	atl2
I Agree. Login	I do not Agree.

Create Desktop Shortcut | Add to favorites | Set as homepage

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Billing Reports in Client

Billing reports can now be accessed via Client: a new Reports module has been added to the Client's menu.

· 🔊 🔹				PracticeAd	min Client							×
Browser						Includ	e Inactive: 🔲 🛛	Practice: PA DEM	10 ACC	OUNT		•
3 C Refresh Stop												
Navigation												
Reports «	Report:	Active Insurances			P	rint Export to Ex-	cel					
Billing Reports Custom Reports	Parame	About the Active Insurances report his report shows all insurance plans currently active for the practice along with addresses and contact phone numbers, including worker's compensation and liability isurance plans.										
	aters	DEMO ACCOUNT Active Insurances report (Report created: 1/22/2013)										
		Plan Name	Plan ID	Ins Type	Payer ID	Address 1	Address 2	City	State	Zip	Phone	
		4TH DISTRICT IBEW HEALTH	32521908	Commercial	00100	P O BOX 2967		HUNTINGTON	wv	25728- 2987	(304) 525- 7886	
		86 BLUE CROSS OF ILLINOIS	22522	BCBS	00002	P O BOX 805107	CLAIMS DEPT	CHICAGO	IL	60680- 4112	(800) 624- 1723	
	1	86 BLUE CROSS OF ILLINOIS	23958	BCBS	00002	P O BOX 805107		CHICAGO	IL	60680- 4112	(800) 367- 8309	
	P	ACE HARDWARE WC	32263583	Third Party Liability	00100	224 E HWY 90 BYPASS		MONTICELLO	KY	42633- 2300		
		ADMINISTAR DMERC MO	23864	Medicare DME	00100	P O BOX 690		NASHVILLE	TN	37202		
		AENTA HEALTHCARE	23521	Aetna	80054	P O BOX 31450		TAMPA	FL	33631- 3450	(800) 282- 8148	
		AETNA	23948	Aetna	60054	P O BOX 981107		EL PASO	тх	79998- 1107	(800) 245- 6738	
Number of the second se												
8 Billing												
Reports												
9 Setup												
Administration												
Ready											Onli	ine ":



Billing Reports are now available on the web site

About

The **Reports** page allows running billing reports directly on the website and access to PracticeAdmin Reporting Services portal to run custom reports.

Billing Reports tab

The page allows running the same set of reports as in Billing Manager.

The page contains the following sections:

- top section with **Report** dropdown, **Print** and **Export to Excel** buttons
- report results section
- Parameters pane

	lling Scheduling	Reports Setup Hel	p Admin			Mercur	y Development		
Report: Patient	Billing Reports> C Count	ustom Reports ×	Print	Export to Excel		Account: PA DEMO	ACCOUNT		
Parameters		0 0			About the Patier	nt Count report	^		
Period Beginning:	10/01/2013		This report displays the number of patients seen in the set period of time by months where the patient has had at least one claim entered in the date range chosen. The report can also be set to display how many new patients have been seen in the chosen period. Specifically, claims that contain one of the following CPT codes - 99241, 99242, 99243, 99244, 99245, 99201, 99202, 99203, 99204, 99205.						
Period Ending:	10/07/2013								
New Patients Only:			Pa	tient Count Re	port (new patie	ents only) for DEMO	ACCOUNT		
	Run Report			F	or period 6/1/20 (Report create	005 to 6/26/2012 d: 6/27/2012)			
					Month	Patient Count			
					February 2006	1			
					March 2006	4			
					April 2008	1	\sim		
					Mail 2008	7			

The **Report** dropdown contains a list of available reports.

After the report is generated it is possible to export the result to XLS file by pressing the **Export to Excel** button. You will be prompted to download the export file.

To print the report results press the **Print** button. This will open the standard Windows **Print** form.

The report results section shows report previews and report results.

Parameters pane

The pane displays parameters of the report currently selected in the **Report** dropdown.

Each report has the same set of parameters as in Billing Manager.



Updated on 10/10/2013

In order to enlarge the report results section, the **Parameters** pane can be collapsed by pressing the sicon in its header or the delimiter between the panes.

pao	illing Scheduling	Reports	Setup	Help	Admin			Mercury Development	
Report: Patient	Count			× ×	Print	Export to Excel	Account: P	A DEMO ACCOUNT	
Parameters		OC				About the Patie	nt Count report		^
Period Beginning:	10/01/2013	III	This report	displays	the numbe	r of patients seen in the set period	of time by months where the	e patient has had at least one claim	
Period Ending:	10/07/2013		Specifically 99205.	, claims t	that contain	one of the following CPT codes - 9	play how many new patients h 9241, 99242, 99243, 99244, 9	ave been seen in the chosen period. 99245, 99201, 99202, 99203, 99204,	
New Patients Only:				Pa	atient C	ount Report (new patie	ents only) for DEM	ACCOUNT	
	Run Report					For period 6/1/20 (Report create	005 to 6/26/2012 ed: 6/27/2012)		
						Month	Patient Count	7	
						February 2006	1]	
						March 2006	4		
						April 2006	1]	~
						Mar 2008	7		

The pane automatically collapses after the report is generated and automatically expands when a new report is selected in the **Report** dropdown.

To manually expand the pane when it is collapsed, press the 💟 icon in its header.

When invalid parameters are entered, follow the tips in the validation tooltips.

Parameters		0	C	About the Aged Tr
As of Date:	10/10/2013	×	^	The Aged Trial Balance, or ATB, can be run as a Management report shows amounts in AR for each of the insurance types
Posted Before		I The date in t	is field	must be equal to or before 10/07/2013 s, and Patient provides addition
(date, optional).	C. Association Dested			Data note: ATB done by DOS (management report) shows a

To speed-up loading of the pane, the contents of parameters are stored in cache. To refresh the parameters (for example, if a patient was recently added in Billing Manager and the **Patient List**

dropdown doesn't display them) press the Sicon in the header of the **Parameters** pane.

Certain reports may be executed for data posted today. To do this, check the **Today only** checkbox on the **Parameters** pane. The **Period Beginning** and **Period Ending** controls will become inactive and will show today's date.



Updated on 10/10/2013

Parameters		G C
Period Beginning:	10/07/2013	N = = = = 2 = = = 2 = = = 2 = = =
Period Ending:	10/07/2013	
Today only:		
Facility:	- Practice Total -	~
Provider:	- All Providers -	*
Payor type:	- All Payors -	*

Run Report

After required parameters are entered press the **Run report** button to generate the report.

Reports generated at night

Some reports which may take considerable amount of time to be executed have the **Generate at night option** among the parameters.

OT I.			
Include Last Year End and Current A/R columns:			
Generate at night:			
	Run Report		

If this option is checked the following message will appear after pressing the **Run Report** button.



Updated on 10/10/2013



To view the results, run the report with <u>the same</u> parameters on the next day and select **Yes** in the appeared dialog.



The report results will be displayed in the corresponding section.

Custom Reports tab

The **Custom Reports** tab opens PracticeAdmin Reporting Services portal that allows running custom billing reports that have been created by the development team and quoted by the Sales Department.

Reworked Setup - CPT Codes page

About

The **CPT codes** page allows managing the list of CPT codes used by the practice, adding new custom CPTs, combining codes in groups, and copying CPTs from other practices.

CPT Codes section

The section allows adding CPTs to the practice from the list of available codes and moving codes between CPT groups (if they exist for the practice - see the <u>CPT Groups</u> section).



Updated on 10/10/2013

Available	CPTs		Practice C	Practice CPTs					
From: 9920	00 To: 99499 Filter		From:	To:	Group:	Υ.	Filter		
99397	PERIODIC PREVENTIVE MED EST PATIENT 65YRS&>	~	99291	CRITICAL CA	RE ILL/INJURED PATI	ENT INIT 30-74 MIN	~		
99397F	PHYSICAL EXAM ESTAB PT GRTR THAN 65	~	99304	INITIAL NURS	SING FACILITY CARE/	DAY LOW SEVERITY	r		
99397SP	PHYSICAL (AGES 18-39)		99305	INITIAL NURS	SING FACILITY CARE/	DAY MODER SEVER	ITY		
99400F	Injection		99308	SBSQ NURSI	ING FACIL CARE/DAY	MINOR COMPLJ			
99401	PREVENT MED COUNSEL&/RISK FACTOR REDJ SPX 15 MIN		99309	SBSQ NURSI	ING FACIL CARE/DAY	NEW PROBLEM			
99401F	SPORTS SCHOOL PHYSICAL		99391	PERIODIC PE	REVENTIVE MED EST	ABLISHED PATIENT	<1Y		
99401FC	SCHOOL PHYSICAL		99392	PERIODIC PE	REVENTIVE MED EST	PATIENT 1-4YRS			
99402	PREVENT MED COUNSEL&/RISK FACTOR REDJ SPX 30 MIN		99393	PERIODIC PE	REVENTIVE MED EST	PATIENT 5-11YRS			
99403	PREVENT MED COUNSEL&/RISK FACTOR REDJ SPX 45 MIN	,	99394	PERIODIC PE	REVENTIVE MED EST	PATIENT 12-17YRS			
99404	PREVENT MED COUNSEL&/RISK FACTOR REDJ SPX 60 MIN		99395	PERIODIC PE	REVENTIVE MED EST	PATIENT 18-39 YRS			
99406	TOBACCO USE CESSATION INTERMEDIATE 3-10 MINUTES		99396	PERIODIC PE	REVENTIVE MED EST	PATIENT 40-64YRS			
99407	TOBACCO USE CESSATION INTENSIVE >10 MINUTES		99400F	Injection					
99408	ALCOHOL/SUBSTANCE SCREEN & INTERVEN 15-30 MIN		99402	PREVENT ME	ED COUNSEL&/RISK F	ACTOR REDJ SPX	30 M		
99409	ALCOHOL/SUBSTANCE SCREEN & INTERVEN >30 MIN		99499A	SCHOOL PH	YSICAL				
99411	PREV MED COUNSEL&RISK FACTOR REDJ GRP SPX 30 MIN	1 ¥	99499B	DOT PHYSIC	AL		~		
<	>		<				>		

The Available CPTs grid contains: (LEFT)

- available standard CPTs (displayed in black font)
- available non-standard (custom) CPTs created by other practices (displayed in grey font)
- non-standard CPTs already added to the practice (displayed in blue font)

The Practice CPTs grid contains: (RIGHT)

- standard CPTs added to the practice (displayed in black font)
- non-standard CPTs added to the practice (displayed in blue font)
- deleted CPTs (displayed in red color)

Both **Practice CPTs** and **Available CPTs** grids can be filtered down to a particular CPT code range by specifying the range in the **From** and **To** fields above the corresponding CPT list.

Note: To filter down to any specific CPT, type it in twice - in the **From** field and in the **To** field. It is also possible to use a part of a CPT, for example, from '99' to '993', which would bring up all codes from 99000 to 99299.

The **Group** dropdown above the **Practice CPTs** grid enables to filter down to a particular CPT group (if they exist for the practice - see the <u>CPT Groups</u> section).

Adding CPT codes to practice

- 1. Enter a range of CPTs in the From and To fields above the Available CPTs grid.
- 2. Press the Filter button.
- 3. Select a single CPT code or multiple codes (by holding Ctrl or Shift).



- 4. Press the > button. This will move selected codes to the top of the **Practice CPTs** grid. Added CPTs will be displayed in green color.
- 5. Alternatively, use the >> button to add all codes currently displayed in the **Available CPTs** grid.
- 6. Repeat steps 1-5 to add more CPTs.
- 7. If a code was added erroneously, select it in the **Practice CPTs** grid (among the codes displayed in green color) and remove by pressing the < button.
- 8. Confirm the changes by pressing the **Update** button.

Available C	PTs		Practice	CPTs			
From: 99200	To: 99499 Filter		From:	To:	Group:	~	Filter
99241S	OFFICE CONSULT 15 PROB FOCUS	•	99218	INITIAL OBS	ERVATION CARE/DAY	LOW SEVERITY	
99242	OFFICE CONSULTATION NEW/ESTAB PATIENT 30 MIN		99243	OFFICE CON	ISULTATION NEW/EST	AB PATIENT 40 MIN	
99242C	Cantey Custom Code		10060	INCISION & [ORAINAGE ABSCESS	SIMPLE/SINGLE	
99242E	Appling ER Custom Codes		10061	INCISION&D	RAINAGE ABSCESS C	OMPLICATED/MULTIPL	E
99242F	CONSULTATION FOCUSED OFFICE		10120	INCISION&R	EMOVAL FOREIGN BO	DY SUBQ TISS SIMPLE	
99242FC	CONSULT OUTPATIENT LEVEL 2		10121	INCISION&R	EMOVAL FOREIGN BO	DY SUBQ TISS COMPL	
99242K	Jenkins Custom Code	>>	10140	I&D HEMATO	MA SEROMA/FLUID C	OLLECTION	
99242S	OFFICE CONSULT 30 EXPANDED		10180	INCISION&D	RAINAGE COMPLEX P	O WOUND INFECTION	
99243	OFFICE CONSULTATION NEW/ESTAB PATIENT 40 MIN	>	11000	DBRDMT EX	TENSV ECZEMA/INFE	CT SKN UP 10% BDY SI	JRF
99243C	Cantey Custom Code	<	11010	DBRDMT W/	RMVL FM FX&/DISLC S	KN&SUBQ TISS	
99243F	CONSULTATION EXPANDED OFFICE		11011	DBRDMT W/	RMVL FM FX&/DISLC S	KN SUBQ T/M/F MUSC	
99243FC	CONSULT OUTPATIENT LEVEL 3		11012	DBRDMT FX	&/DISLC SUBQ T/M/F E	ONE	
99243K	Jenkins Custom Code		11040	DEBRIDEME	NT SKIN PARTIAL THI	CKNESS	
99243S	OFFICE CONSULT 40 MIN LOW		11041	DEBRIDEME	NT SKIN FULL THICKN	ESS	
99244	OFFICE CONSULTATION NEW/ESTAB PATIENT 60 MIN		11042	DEBRIDEME	NT SUBCUTANEOUS	TISSUE 20 SQ CM/<	
99244C	Cantey Custom Code	~	11043	DEBRIDEME	NT MUSCLE & FASCIA	20 SQ CM/<	~
			The list c	ontains deleted	CPTs (shown in red)		

Update Cancel

Note: If the **Practice CPTs** grid is filtered down to any particular CPT group, the codes will be linked to this group when adding to the practice.

Removing CPT codes from practice

- 1. Enter a range of CPTs in the From and To fields above the Practice CPTs grid.
- 2. Press the **Filter** button.
- 3. Select a single CPT code or multiple codes (by holding Ctrl or Shift).
- Press the < button. This will move selected codes to the top of the Available CPTs grid. Removed CPTs will be displayed in red color.
- 5. Alternatively, use the << button to remove all codes currently displayed in the **Practice CPTs** grid.
- 6. Repeat steps 1-5 to remove other CPTs.
- 7. If a code was removed erroneously, select it in the **Available CPTs** grid (among the codes displayed in red color) and add it back to practice by pressing the > button.



Updated on 10/10/2013

Update

Cancel

8. Confirm the changes by pressing the Update button.

Available C	PTs		Practice	CPTs			
From: 99200	To: 99499 Filter		From:	To:	Group:	· •	Filter
11011	DBRDMT W/RMVL FM FX&/DISLC SKN SUBQ T/M/F MUSC	~	10060	INCISION & D	DRAINAGE ABSCESS S	IMPLE/SINGLE	
11040	DEBRIDEMENT SKIN PARTIAL THICKNESS		10061	INCISION&DI	RAINAGE ABSCESS CO	MPLICATED/MULTIPLE	
99201	OFFICE OUTPATIENT NEW 10 MINUTES		10120	INCISION&RI	EMOVAL FOREIGN BO	DY SUBQ TISS SIMPLE	
99201C	Cantey Custom Code		10121	INCISION&R	EMOVAL FOREIGN BO	DY SUBQ TISS COMPL	
99201C04	Cantey Custom Codef		10140	I&D HEMATC	MA SEROMA/FLUID C	OLLECTION	
99201C1	Cantey Custom Code1s		10180	INCISION&DI	RAINAGE COMPLEX P	WOUND INFECTION	
99201F	OFFICE VISIT MINIMAL NEW	20	11000	DBRDMT EX	TENSV ECZEMA/INFEC	T SKN UP 10% BDY SUP	RF
99201K	INITIAL OFFICE VISIT-PROBLEM FOCUSED		11010	DBRDMT W/	RMVL FM FX&/DISLC S	KN&SUBQ TISS	
99201S	OV, NEW PATIENT 10 MINUTE	>	11012	DBRDMT FX	&/DISLC SUBQ T/M/F B	ONE	
99201SP	Problem Focused Hx/Exam SF Med Decision	<	11041	DEBRIDEME	NT SKIN FULL THICKN	ESS	
99202	OFFICE OUTPATIENT NEW 20 MINUTES		11042	DEBRIDEME	NT SUBCUTANEOUS T	ISSUE 20 SQ CM/<	
99202C	Cantey Custom Code		11043	DEBRIDEME	NT MUSCLE & FASCIA	20 SQ CM/<	
99202F	OFFICE VISIT FOCUSED NEW		11044	DEBRIDEME	NT BONE MUSCLE &/F	ASCIA 20 SQ CM/<	
99202K	Jerkins Custom Code		11055	PARING/CUT	TING BENIGN HYPER	KERATOTIC LESION 1	
99202S	OV, NEW PATIENT 20 EXPANDED		11056	PARING/CUT	TING BENIGN HYPER	KERATOTIC LESION 2-4	
99202SP	Expanded PF Hx/Exam SF Med Decision	~	11100	BX SKIN SUE	CUTANEOUS&/MUCO	US MEMBRANE 1 LESIO	N

Moving CPTs to a CPT group

Applicable if the practice has CPT groups - see the CPT Groups section.

- 1. Enter a range of CPTs in the From and To fields above the Practice CPTs grid.
- 2. Select any particular group in the **Group** dropdown to display CPTs of this this group only. To filter down to CPTs not linked to any group, select the *-Out-of-group CPTs-* item.
- 3. Press the **Filter** button.
- 4. Select a single CPT code or multiple codes (by holding Ctrl or Shift) in the **Practice CPTs** grid.
- 5. Select a group in the **Move selected CPTs to group** dropdown appeared below.
- 6. Confirm the changes by pressing the **Move** button.

99243	OFFICE CONSULTATION NEW/ESTAB PATIENT 40 MIN	
99244	OFFICE CONSULTATION NEW/ESTAB PATIENT 60 MIN	
99245	OFFICE CONSULTATION NEW/ESTAB PATIENT 80 MIN	
99251	INITL INPATIENT CONSULT NEW/ESTAB PT 20 MIN	~

Move selected CPTs to group: Office

Move



Removing CPTs from CPT group

Applicable if the practice has CPT groups - see the <u>CPT Groups</u> section.

- 1. Enter a range of CPTs in the From and To fields above the Practice CPTs grid.
- 2. Select a group in the **Group** dropdown.
- 3. Press the Filter button.
- 4. Select a single CPT code or multiple codes (by holding Ctrl or Shift) in the **Practice CPTs** grid.
- 5. Select the -*No group* item in the **Move selected CPTs to group** dropdown appeared below.
- 6. Confirm the changes by pressing the **Move** button.

If the practice is setup to do anesthesia claims, the **Anesthesia Conversion Factor** field will be displayed. The conversion factor is the number of dollars that will be calculated per anesthesia unit.

Anesthesia Conversion Factor: 40

Update

Type a value in the **Anesthesia Conversion Factor** and press the **Update** button.



Updated on 10/10/2013

Non-standard Practice CPTs section

The section allows adding custom CPTs to the practice.

Non-Standard	Practice CPTs							
Add Remo	ve				Search:	outpatient	<	>
Code	Description	Sales Tax	Inventory	Active	Is NOC	Group		Ì
99213WC	W/COMP OFFICE/OUTPATIENT VISIT, EST			2		W/COMP		•
99214WC	W/COMP OFFICE/OUTPATIENT VISIT, EST			\checkmark		W/COMP		
99215WC	W/COMP OFFICE/OUTPATIENT VISIT, EST			\checkmark		W/COMP		
99456BA	BA Designated Doctor Exam - No Show			\checkmark				
99456WP	WP Designated Doctor Exam Not @ MMI			\checkmark				
99456WP-L1	WP-L1 Designated Doctor Exam >= 2 Yrs			\checkmark				~
3 match(es)) found.							

The grid displays non-standard CPTs created for the practice.

To find a CPT by its code or description, type a search term in the **Search** field. The grid will automatically scroll to the first found CPT, highlighting the matches in yellow.

Adding non-standard CPT code to practice

- 1. Press the Add button.
- 2. Populate the fields: the **Code** field is required, other fields are optional.
- 3. Confirm the changes by pressing the **Update** button.

Add Ren	nove				Search:		< >
Code	Description	Sales Tax	Inventory	Active	Is NOC	Group	
NEW CODI ×				~		- No group -	- /
99213WC	W/COMP OFFICE/OUTPATIENT VISIT, EST	Update	Cancel			W/COMP	
99214WC	W/COMP OFFICE/OUTPATIENT VISIT, EST					W/COMP	
99215WC	W/COMP OFFICE/OUTPATIENT VISIT, EST					W/COMP	
99456BA	BA Designated Doctor Exam - No Show			\checkmark			
99456WP	WP Designated Doctor Exam Not @ MMI			\checkmark			-



Removing non-standard CPT code from practice

- 1. Select a CPT.
- 2. Press the **Remove** button.
- 3. Confirm removal by pressing the **YES** button in the appeared dialog.



Note: CPTs are not deleted forever. When a new non-standard CPT with the same code is created, the warning will appear:

Undelete Non-Standard code?	8
The code "83026C" already existed in your practice for HEMOGLOBIN and was deleted on 10/05/2013.	
You may un-delete and edit the old code information, or enter another code for the current one.	
Un-delete Cancel	

Press the **Un-delete** button to restore the original CPT, or the **Cancel** button to correct the code of the CPT being created.

Editing non-standard CPT codes

- 1. Double click on the line with a CPT code.
- 2. Modify the fields. For example, to link the code to a CPT group (if they exist for the practice see the <u>CPT Groups</u> section), select it in the **Group** dropdown.
- 3. Confirm the changes by pressing the **Update** button.

Note 1: The Sales Tax, Inventory, Active and Is NOC checkboxes may be edited without double clicking on a line.

Note 2: If the **Active** checkbox is unchecked the code will be removed from the **Practice CTPs** grid and will become unavailable in Billing Manager.



PA Web Site v6.2 Updated on 10/10/2013

CPT Groups section

The section allows adding CPT groups to the practice.

CPT Groups	
Add Remove	
Description	
Aesthetics	~
Hospital	
Incentive	
Labs	
Miscellaneous	
Office E&M	
PQRI	~

The records are added, edited and removed in the same way as for the **Non-Standard Practice <u>CPTs grid</u>**.

Copy CPT Codes and Groups section

The section allows copying CPT codes and groups from other practices.

Copy CPT Codes and Groups			
Copy	Copy method		
Non-Standard CPT Codes Copy CPT Groups Only	Add	- Select Practice -	• СОРУ
CPT Groups			

Copying CTP codes

- 1. Select the CPT type to copy in the **Copy** area: **CPT codes** (standard codes) or **Non-Standard Codes** (custom codes).
- 2. Specify how the codes should be copied in the **Copy method** area:
 - Add to keep the existing codes selected in step 1 already added to the practice.
 - **Replace -** to remove existing codes.
- 3. Select the source practice in the dropdown.
- 4. Press the **COPY** button.
- 5. Confirm the changes in the appeared dialog by pressing the **Yes** button.



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The copied CPTs will appear in the corresponding CPT list (the **Practice CPTs** and the **Non-Standard Practice CPTs** grids).

Copying CTP groups

- 1. Select CTP Groups in the Copy area.
- 2. Select the **Copy related CPT codes** option to copy all codes included in the groups. To copy groups without related code select the **Copy CPT Groups Only** option.
- 3. Specify how the groups should be copied in the **Copy method** area:
 - Add to keep the existing CPT groups.
 - Replace to remove existing CPT groups.
- 4. Select the source practice in the dropdown.
- 5. Press the **COPY** button.
- 6. Confirm the changes in the appeared dialog by pressing the **Yes** button.

The copied CPT groups will appear in the **CPT Groups** grid. If the **Copy related CPT codes** option was selected, the copied CPTs will appear in the corresponding CPT list (the **Practice CPTs** and the **Non-Standard Practice CPTs** grids).

Audit log for allowable schedules and charge masters

Log of changes for all allowable schedules and charge masters will be available for Practice Manager users on the Setup - Fees page of the web site.

The log can be reviewed using the Audit Log menu available for both allowable schedules and charge masters.



Updated on 10/10/2013

ees										
asks	Allowable Schedules - [Active for Today]									
What would you like to lo?	Select a task to perform from th view or edit below.	ne left-hand "T	asks" panel, o	r double-click	an allowable schedule to	D				
Allowable Schedules	Name	From Date	To Date	Base Type	Base Name					
Add New	UHCBCBSPRACTICE S	11/29/2012	(Open Ended)	None	(No Base)	-				
Edit/View Export Overrides	1greatwest ppo 2012	4/13/2012	(Open Ended)	None	(No Base)					
Import Overrides	testq1	12/20/2011	(Open	Medicare	Medicare 2011 Q1					
Charge Masters	Test Q4	11/23/2011	(Open	Medicare	Medicare 2011 Q4					
Add New		2/24/2011	Ended)	Nees	(N. D)	-				
East/view Export Overrides	Charge Masters - [Active for Tod	ay]				^				
Import Overrides	Select a task to perform from the	ne left-hand "T	asks" panel, o	r double-click	a charge master to view	or				
Addit Log										
	Name	From Date	To Date	Base Type	Base Name					
efault Facility	medicare	8/5/2010	(Open Ended)	Medicare	(Current Medicare)	Ê				
Update	sdfhsfj	7/1/2010	(Open Ended)	Medicare	(Current Medicare)	-				

Audit	Loa	is	represented	as	an	additional	wizard	option:
/ toolt	LUG	10	represented	us	un	uduntionui	wizai a	option

First step: select an item to review the audit log for.

Select an allowable schedule or charge master list to review the log of changes for. Events for all charge masters or allowable schedules will be presented if nothing is selected on the first step of the wizard. Allowable schedules and charge masters share the same set of events.



Updated on 10/10/2013

AI	lowal	ble	Scł	hed	ul	es -	Aud	lit	Log	
----	-------	-----	-----	-----	----	------	-----	-----	-----	--

Select an Allowable Schedule

Select the desired item in the list and press Next to review the event log for any particular item. If nothing is selected, all events will be display ed at the next step.

Published?	Name	From Date	To Date	Base Type	Base Name
False	1	5/21/2010	(Open Ended)	Medicare	Medicare 2010 Q2b
True	1greatwest ppo 2012	4/13/2012	(Open Ended)	None	(No Base)
True	234	4/27/2010	(Open Ended)	Medicare	(Current Medicare)
True	AETNA TEST	1/1/1990	(Open Ended)	None	(No Base)
True	sch_4	2/24/2011	(Open Ended)	None	(No Base)
True	Test Q4	11/23/20	(Open Ended)	Medicare	Medicare 2011 Q4
True	test1	5/21/2010	(Open	Medicare	(Current Medicare)

Second step: review event log.

The list of events will be presented on the next step of the wizard filtered according to what was selected in the first step of the wizard. Events can be of the following types:

- Item Created
- Properties Updated
- Overrides Updated
- Overrides Imported

The Item Created event corresponds to creation of the given allowable schedule or charge master.

The Properties Updated event corresponds to updating common properties of the given allowable schedule or charge master (excluding updating overrides, which is represented as another event type).

The Overrides Updated event corresponds to manual updating of the overrides list for the given charge master or allowable schedule.

The Overrides Imported event corresponds to importing of the list of overrides for the given charge master or allowable schedule.



The event list provides the following information:

- Name of the corresponding allowable schedule or charge master.
- Event type
- Date and time of the event
- Full name of the user who performed the event

The list of events can be sorted by any column by clicking on the name of the desired column.

The list of events are filtered to display only events falling in the set date range. By default, the date range is set to display events from the last ten days.

Events can also be removed by marking them for removal via checking the corresponding checkboxes in the Mark to remove column of the event log and clicking the Remove Selected button. All displayed events can be marked simultaneously by checking the Mark to remove checkbox in the header of the Mark to remove column.

Cł	arge Masters - Audit Log				
	vent Log select any event in the table and press Nex	t to view details of	the event.		
		Dat	te From: 9/28/2013 🏢	Date To: 10/8/2013	Refresh
	Name	Event Type	Date/Time	User	Mark to remove
	New charge master_1	Overrides Updated	10/8/2013 11:42:24 AM	Development, Mercury	
	New charge master_1	Properties Updated	10/8/2013 11:40:41 AM	Development, Mercury	
	New charge master_1	Created	10/8/2013 11:37:52 AM	Development, Mercury	
				Re	move Selected
				Back Next Fin	nish Cancel

Third step: review event details.

Details of each event can be reviewed on the next step of the Audit Log wizard by selecting any event and clicking the Next button, or double-clicking the desired event.



Updated on 10/10/2013

The Event Details step contains the detailed changes logged for the selected event. This step contains 3 sub-tabs for different details: Properties, Overrides, and Facilities/Insurances/Providers. Each sub-tab lists all updates performed for the corresponding category during the event.

The Item Created event does not have any details to review, and all Event Details sub-tabs will be empty.

The Properties Updated event will have old and new values listed in the Properties sub-tab with updated or changed values highlighted in yellow color in the New Values area. Details about updated lists of associated facilities, providers, and insurance plans will be listed on the separate Facilities/Insurances/Providers sub-tab. All items added or removed from the corresponding lists will be specified in the Added and Removed areas.

The Overrides Updated and Overrides Imported events will contain details on all individual overrides updated by the event split into Old values and New values sections. Changed values will be highlighted with yellow color for each updated override.

Sub-tabs that do not contain any information will be grayed out on the Event Details step.

harge Master	rs - Audit L	og												
E <mark>vent Detai</mark> Use this table	s e to review	detailed cł	nanges appl	ied to the Ne	ew charge master	_1 charge ma	ster.							
	Propert	ies		(Overrides		Facilities / Insurances / Providers							
Old values									New va	lues				
СРТ	Modifier	Use %	Fac. %	Fac. \$	Non-Fac. %	Non-Fac. \$	СРТ	Modifier	Use %	Fac. %	Fac. \$	Non-Fac. %	Non-Fac. \$	
M0064							M0064		False	110%	\$12.00	110%	\$13.00	
000000							000000		False	110%	\$0.00	110%	\$0.00	
000008							000008		False	110%	\$150.00	110%	\$150.00	



Updated on 10/10/2013

Charge Masters - Audit Log

Event Details Use this table to review detailed changes applied to the New charge master_1 charge master.

Properties	Overrides	es / Providers				
Old v	alues	New values				
Name	New charge master	Name	New charge master_1			
Base Schedule	(Current Medicare)	Base Schedule	(Current Medicare)			
Effective Dates	08/05/2010 - Open-ended	Effective Dates	08/05/2010 - 09/30/2013			
Default facility multiplier	100 %	Default facility multiplier	110 %			
Default non-facility multiplier	100 %	Default non-facility multiplier	110 %			
Active?	True	Active?	True			

Back Next Finish Cancel



Updated on 10/10/2013

Properties Overrides	Facilities / Insurances / Providers	
Added	Removed	
SEN ZIPCODE TEST		
	DR. MI FOOT AND ANKLE SURGEON	
	Insurance Plans	
19041] BILL REVIEW SERVICE - Workers Comp		
	Providers	
	RENNITTO DEDRO L (20151)	

Navigation between steps of the Audit Log wizard is possible via the use of Back, Next, and Cancel buttons.

Updated PraticeAdmin logo

The PracticeAdmin logo has been updated.

nao	Billing	Scheduling	Reports	Setup	Help	Admin	n	
Practice Admin	General	Users Fac	cilities Pr	oviders	Stater	ments 🤇	CPT Codes < Fees > Forced Exceptions	
							Account	t:

Updated Scheduling Setup controls

First Appt and Last Appt available times on the now include all values with the step of 5 minutes:



00, 05, 10, 15, 20, 25, 30, 35, 40, 45, 50, 55

The same update has been applied to the **From Time** and **To Time** controls for time-offs, with the **To Time** list having the following values:

04, 09, 14, 19, 24, 29, 34, 39, 44, 49, 54, 59.

Default Facility setting moved to the Setup - Fees page

The **Default Facility** setting has been moved to the Setup - Fees page.

The setting is represented as a drop-down list of all available facilities with the current default facility selected by default.

To reassign default facility, select any item in the list other than the currently assigned facility and click the Update button.

The default facility can be unassigned by selecting the -- Not Assigned -- item in the list and clicking the Update button.

Fees						
Tasks	Allowable Schedules - [Active for	r Today]				^
What would you like to do?	Select a task to perform from the view or edit below.	ne left-hand "T	asks" panel, o	r double-click a	an allowable schedule t	0
Allowable Schedules	Name	From Date	To Date	Base Type	Base Name	
Add New	UHCBCBSPRACTICE S	11/29/2012	(Open Ended)	None	(No Base)	
Edit/View Export Overrides	1greatwest ppo 2012	4/13/2012	(Open Ended)	None	(No Base)	
Import Overrides Audit Log	testq1	12/20/2011	(Open Ended)	Medicare	Medicare 2011 Q1	
Charge Masters	Test Q4	11/23/2011	(Open Ended)	Medicare	Medicare 2011 Q4	
Add New Edit/View		0/04/0014	(0	N	(N= D===)	-
Export Overrides	Charge Masters - [Active for Tod	ay]				^
Import Overrides Audit Log	Select a task to perform from the edit below.	ne left-hand "T	asks" panel, o	r double-click a	a charge master to view	or
	Name	From Date	To Date	Base Type	Base Name	
t Default Facility ACILITY BILLING TEST (60) 🔻	medicare	8/5/2010	(Open Ended)	Medicare	(Current Medicare)	
Update	sdfhsfj	7/1/2010	(Open Ended)	Medicare	(Current Medicare)	-

Is NOC option for Non-Standard CPT codes

All non-standard CPT codes now have the **Is NOC** option. The **Is NOC** option is available for all listed non-standard codes after the Active option.



Updated on 10/10/2013

Non-Standard Practice CPTs								
Add Rem	ove			Search:			< >	>
Code	Description	Sales Tax	Inventory	Active	Is NOC	Group		
11006,80	KN SUBQ T/M/F NECRO INFCTJ GENT/ABD ×					- No group -		^
15734,80	MUSC MYOCUTANEOUS/FASCIOC	Cancel		\checkmark				
17000,1	DEST.BENIGN LESION ANY METHOD TINGT			\checkmark				
36011,M	SELECTIVE CATH PLACEMNT-VENOUS S			\checkmark				
36468,1	SCLEROTHERAPY SPIDER VEINS			\checkmark	\checkmark			
36468,2	INJECTION-SCLEROSING SOLUTION			\checkmark				\sim
						,		

Improved collection agency management

Collection agencies can now be renamed and deleted via the web site. To rename or delete a collection agency, click the Edit hyperlink next to a collection agency, perform changes and click the Update hyperlink. All changes made to collection agencies are only applied when the Update button on the bottom of the page is clicked.

Deleted collection agencies can be displayed by checking the Show Deleted checkbox on the Setup - Statements page.

	<u>Add</u>	New Show Deleted
		Name
	Edit	123456
	Edit	agency1
Collection	Edit	agency2
Agencies:	Edit	Barristers
	Edit	Chapman Financial Svs Inc
	Edit	Fox Collection Agency
	Edit	Solutia
	Edit	Test 6.0 Agency
	Edit	Test Collection Agency



PA Web Site v6.2 Updated on 10/10/2013

Add New Show Deleted Deleted? Name ⊙ Yes Update Cancel 123456 O No Collection Edit No agency1 Agencies: Edit No agency2 Edit Barristers No Edit Chapman Financial Svs Inc No <u>Edit</u> Fox Collection Agency No <u>Edit</u> Solutia No Test 6.0 Agency No <u>Edit</u> <u>Edit</u> Test Collection Agency No Final Notice: 24 💌 * Please press the Update button to apply the changes. Update

New setting on the Setup - General screen: Allow EDI submission of \$0 charges claims

A new Allow EDI Submission of \$0 charges claims setting is now available on the Setup - General page. The setting allows claims with \$0 total charges to be processed normally when enabled instead of going to the Not Submitted status after release.

Practice Year End Month	lune	CC E-mails to Manager	No preference
Account # Deefer			
*This is locked now	ST	Practice Manager E-mail	sales@practiceadmin.c
Automatically Assign Acct#'s	V	EDI Claims E-mail	sales@practiceadmin.co
Use Tax ID from	Each Provider	EDI Payments E-mail	sales@practiceadmin.c
Practice Tax ID	21-2215235	Billing Inquiries Phone #	(866) 294-9255
Anesthesia practice	₹	Prompt when pmt posting for low pay reason?	Calculate, prompt for low pay
Dental practice		Do Not Calculate Charges	
Use visit numbers	v	Set new claims to hold	
Use additional patient A/C#s		Allow submission of \$0 balance claims	
Accounting Deviad Cutoff Data		Allow EDI submission of \$0 charges claims	
Accounting Period Cutoff Date	_	Show Ref Prov and PCP on pt form	
Set by Practice Mgt Company for All Pr	actices	Include flag for emergency services	
Day OR Last Day 🗹		Default Number of Diagnoses to Show	6 -
Of the Current Vonth	1	Allow Employment-Related Claims for Primary Insurance	
Encounter Forms		Allow Sending Claims to EDI as Voided	
Don't print member ID on encounter	forms	Local Coverage Determinations	Do not check
Patient's SSN Print		Allow Printing Additional Diagnosis Codes on CMS-1500	
		Allow pre-released claims for Show Last buttons	
Update			



We've also improved the functionality for Allow submission of \$0 balance claims, so claims now go to Awaiting EDI Submission when a claim balance has been paid in full.

Provider ID for all provider lists on the web site

Provider ID is now added for all provider lists available on the web site. Provider ID will be displayed in parentheses after provider name.

Updated Billing tab

Order of sub-tabs on the Billing tab has been changed to the following:

- Billing
- EDI Payments
- EDI Portal
- Review Claims
- EDI Claims
- Collections
- Bulk Financial Process

The <u>Check Internet Speed</u> and the <u>Search the NPI Database</u> hyperlinks on the Billing - Billing sub-tab are now opened in a new browser window when clicked.

The **Newsletters and Bulletins** section on the Billing - Billing sub-tab has been renamed to **Useful** Links.

The **PA Question of the Month** image has been removed.

	Billing Sc	heduling	Reports	Setup	Admin					
Fractice Admin	<billing></billing>	EDI Paym	nents ED	I Portal	Review Claims	EDI Claim	s Collection	s Bulk Fir	ancial Proces	is
< Welcome	e to PA									
Launch E <u>Click here</u>	Silling i jif you are h	Install Prer aving trou	eguisites ble launch	ing Billin	9		Useful Lini • Syste • NPI Q • Havin • Meeti • Suppo	ks m Slow? <u>Ch</u> uestions? <u>S</u> g Trouble? ; ng ID: prt Applicatio	eck Interne earch the N Set Trusted	t Speed PI Database Sites Join Meeting Support Tool

The practice selection control has been removed from the EDI Claims sub-tab. Only claims of the currently selected practice will be available for review.



Updated on 10/10/2013

© EDI Claim Confirmations		
Status: All	Date From: 10/3/2013	This practice has no EDI services set up.
Carrier: All 💌	Date To: 10/10/2013	
Patient:Select All	Claim Number:	
Provider Name:Select All	Patient Acct:	
Rejections only view		
View EDI Files		

The 'Seeing a login screen below? Click here to fix the problem.' hyperlink is now more visible.

Seeing a login screen below? Click here to fix the problem.

§ EDI Portal

Certain headers and text labels have been renamed:

1. For EDI Claims sub-tab:

EDI Confirmations -> EDI Claim Confirmations. EDI services list -> This practice is set up for the following EDI services: Patient acct #: -> Patient Acct: Show EDI Files -> View EDI Files

- For EDI Payments sub-tab:
 Electronic Remittance Advice -> EDI Payments
- For the Review Claims sub-tab: Review Claims -> Review Claims on Hold (header) Review Claims -> View Claims (button)

Updated Setup - Users page

Adding new users and linking the existing users to the practice is now available via two hyperlinks placed on top of the page.

Add New Users hyperlink will produce the standard Add New User window when clicked, and Link Additional Users hyperlink will provide a search field instead of the full list of all unlinked users to browse manually.

Linking users to the current practice

To link more users to the practice,



- Click the Link Additional Users hyperlink and find the desired user or a set of users using the Search field.
- Users can then be linked to the practice by clicking the Link User to Practice hyperlink available for each found user. Security level and option to CC to manager are available as before or all users being added to the practice.

The search is performed for full names of users, enabling use of wildcards before and after the search word. Search results will contain all active and not deleted users matching the search criteria, not yet linked to the current practice. Search results are split into pages containing 20 entries each if there are too many results to display on a single page.

Users ink Additional Users Add New Users Users Hel santiago Search Done Full Name User Name Security Level CC To Manager • Yes DESANTIAGO, LISA LISAD Physician, Non-Manager 💌 Link User to Practice O No ⊙ Yes Santiago, Mia MSantiado Physician, Non-Manager 💌 Link User to Practice O_{No} Total found: 2 Users linked to the practice User Name First Middle Last Search Reset Name Name Name CC To Last Login Security Level Email Name Manager & Password Status Last Login: 10/10/2013 9:12:27 AM Last P/W change: 10/10/2013 9:12:27 AM <u>Edit</u> Physician, Non-Manager cpriddy30@gmail.com Yes UserName: frontdesk Password reset?: Yes Password Expiration: Default , testUser123 Billing Specialist asdf@adsf.com Last Login: 10/10/2013 9:12:27 AM Edit Yes UserName: testUser123 Last P/W change: 10/10/2013 9:12:27 AM Password reset?: No Password Expiration: Default

To hide the search results for linking additional users press the Done button.

Ability to search users linked to the practice

Now users linked to the practice can be searched from the Setup - Users page instead of browsing through the full lit of linked users.

A search can be performed using any search field. The Search button becomes available when at least one of the search fields is not empty.

The search filters down complete list of users linked to the practice according to the specified search parameters. All matches for individual fields will be displayed, for example, if name John is specified for the First Name field and Doe is specified for the Last Name field, all users with name John AND all users with last name Doe will be listed in the search results.

By default, search is performed using direct match, but it can be broadened by using wildcards * and %. Wildcards can be entered before or after the word, but not in the middle.

To reset search results to full list of all linked users, click the Reset button.



Updated on 10/10/2013

ŝ Us	ers					
<u>Link</u>	Additional Users Add New Use	ers			Users He	
Use	rs linked to the practice	Last	First	Middle	Search Reset	
Na	Name	Security Level	Email	CC To Manager	Last Login & Password Status	
<u>Edit</u>	, UserName: frontdesk	Physician, Non-Manager	cpriddy30@gmail.com	Yes	Last Login: 10/10/2013 9:12:27 AM Last P/W change: 10/10/2013 9:12:27 AM Password reset?: Yes Password Expiration: Default	
<u>Edit</u>	, testUser123 UserName: testUser123	Billing Specialist	asdf@adsf.com	Yes	Last Login: 10/10/2013 9:12:27 AM Last P/W change: 10/10/2013 9:12:27 AM Password reset?: No Password Expiration: Default	
<u>Edit</u>	A, James Graham UserName: grahamja	Billing Specialist	docjgraham@yahoo.com	Yes	Last Login: 10/10/2013 9:12:27 AM Last P/W change: 10/10/2013 9:12:27 AM Password reset?: No Password Expiration: Default	
<u>Edit</u>	Adameit, Hilary UserName: adameith	Admin level	adameith@practiceadmin.com	Yes	Last Login: 10/10/2013 9:12:27 AM Last P/W change: 10/10/2013 9:12:27 AM Password reset?: No Password Expiration: Default	
<u>Edit</u>	ADAMEIT, TEST UserName: hadameit	File Clerk, read only	ADAMEITA@AOL.COM	No	Last Login: 10/10/2013 9:12:27 AM Last P/W change: 10/10/2013 9:12:27 AM Password reset?: No Password Expiration: Default	

Check for unique email address when adding or editing users

User's emails are now checked to be unique when a new user is added or an existing user is edited.

User-specific password expiration

Administrators and practice managers are now able to configure password expiration setting for individual users.

The Password Expiration setting is available on the Setup - Users page, allowing choosing one of the listed values which will be used to determine the amount of days between mandatory password changes for the corresponding users.

Default setting corresponds to the currently set instance-wide password expiration setting.

🗧 Users						
Link Additional	Users Add New Users					Users Help
Users linked	I to the practice	Last	First	Middle Name	Search	Reset
	Name	Security Level	Email	CC To Manager	Last Login & Password Status	
Update Cancel	, UserName: frontdesk	Physician, Non-Manager 💌	cpriddy30@gmail.com	€ _{Yes}	Reset Password Enable Account Remove User Reset GUID	
				O No	Password Expiration: Default	
<u>Edit</u>	, testUser123 UserName: testUser123	Billing Specialist	asdf@adsf.com	Yes	Last Login: 10/8/201 Last P/W change: 10	29 AM
					Password reset?: No 30 days Password Expiration: 60 days	
<u>Edit</u>	A, James Graham UserName: grahamja	Billing Specialist	docjgraham@yahoo.com	Yes	Last Login: 10/8/20190 days Last P/W change: 10 120 days	29 AM
					Password reset?: No Password Expiration: 150 days	
<u>Edit</u>	Adameit, Hilary UserName: adameith	Admin level	adameith@practiceadmin.com	Yes	Last Login: 10/8/2011180 days Last P/W change: 10/8/2013 3:36:2	29 AM
					Password reset?: No Password Expiration: Default	



Setup - Facilities page updated

Certain labels and textual descriptions have been updated on the Facilities page:

Help -> Facility Help

Zip -> **Zip + 4**

Check this if you will be doing UB92 (aka CMS 1450) billing for this facility -> Check this if you will be doing UB04/CMS-1450 billing for this facility

Statement Settings = Statement Settings (ARI Workflow Manager Only)

PIN # (This is NOT for provider PIN#'s, but is for facilities that have been credentialed as a 'provider', and have been issued a specific PIN# for that purpose - this would print in HCFA 32) -> PIN # (This is NOT for provider PIN#'s, but is for facilities that have been credentialed as a 'provider', and have been issued a specific PIN# for that purpose - this would print in CMS-1500 box 32)



Updated on 10/10/2013

Facilities	
	GROVE GENERAL HOSPITAL (IP) (1106) Create New
Select Facility	Delete Selected Facility
Facility Name	GROVE GENERAL HOSPITAL IP
Place of Service Code	21 - Inpatient
Address 1	1310 S MAIN ST
Address 2	
City	GROVE
State	OK 🔽
Zip + 4	74344
Phone 1	(918) 555-5555
Phone 2	
Fax	(918) 555-5555
Tax ID	123456789
Facility NPI (CMS- 1500 32)	
Group NPI (CMS- 1500 33)	Use this field if you have more than one group NPI for your practice, then this group NPI will be used when claims are entered for this facility.
Emergency Facility	Check if most services for this facility will be Emergency (active if 'Include flag for emergency services' is checked on General).
🗖 Anesthesia Facility	Check if most claims for this facility will be Anesthesia (Active if 'anesthesia practice' checked on General)
Dental Facility	Check if most claims for this facility will be Dental (Active if 'Dental practice' is checked on General)
✓ Facility Billing	Check this if you will be doing UB04/CMS-1450 billing for this facility
Bill Type	
Revenue Code	
Statement Settings	(ARI Workflow Manager Only)
Printing Enabled 🗖 S	eparate Printing 🗖 Use Facility Address
Save	
PIN # (This is NOT fo	r provider PIN#'s, but is for facilities that have been credentialed as a
provider', and have box 32)	been issued a specific PIN# for that purpose - this would print in CMS-1500
Insurance	e Type PIN
Add pin for all inst	urance types 🔽 Add New



Setup - Providers page updated

Certain labels and textual descriptions have been updated:

Header of the Providers section was removed.

Help ->Provider Help

UPIN search has been changed to use NPI as a primary search parameter.

<pre>% Providers</pre>			
			Provider Help
Select Provider ABU OBEIDU CO, AMER C TCTC, C (14588) 🔽 🗖 Include Referring			
Edit Provider Info	Delete Selected Provider	Add New Provider	
Would you like to use our NPI search to add the provider?			
Yes No			

Setup - Statements page updated

Pre-created dunning messages (Available Dunning Messages) are no longer available on the Setup - Statements page.

Help hyperlink was renamed to Statements Help.

Fixed issues

1. Balance transferred from one service line to another on the same claim will now be counted correctly when calculating patient balance for collections.



Claims with unspecified provider in EHR Import Error bucket now displayed in transaction history

Claims in the EHR Import Error bucket with unspecified provider will now be displayed on the Patient Transaction History screen for all patients to avoid balancing issues.

Fixed issues

- 1. Time required to open industrial accounts with a lot of previously posted transactions on the Payment Application screen is now reduced.
- 2. An issue with claims falling into the EDI Claim Errors bucket if the primary insurance of the patient was changed before transferring claim to secondary is now addressed.