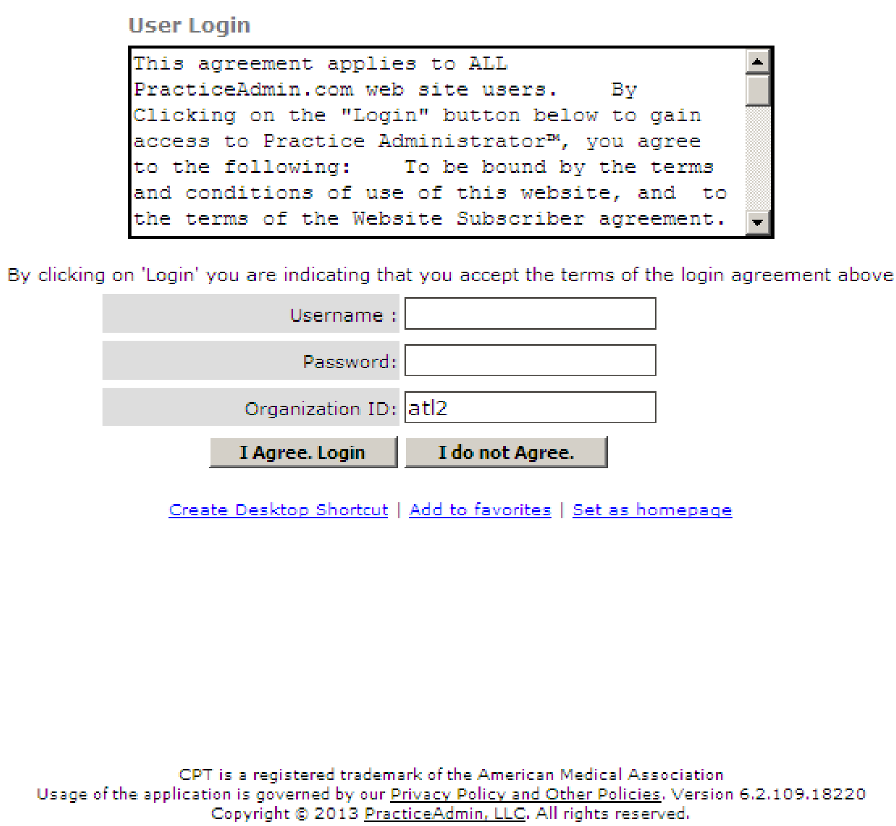
PA Client v6.2

Updated on 10/10/2013

Updated Login page

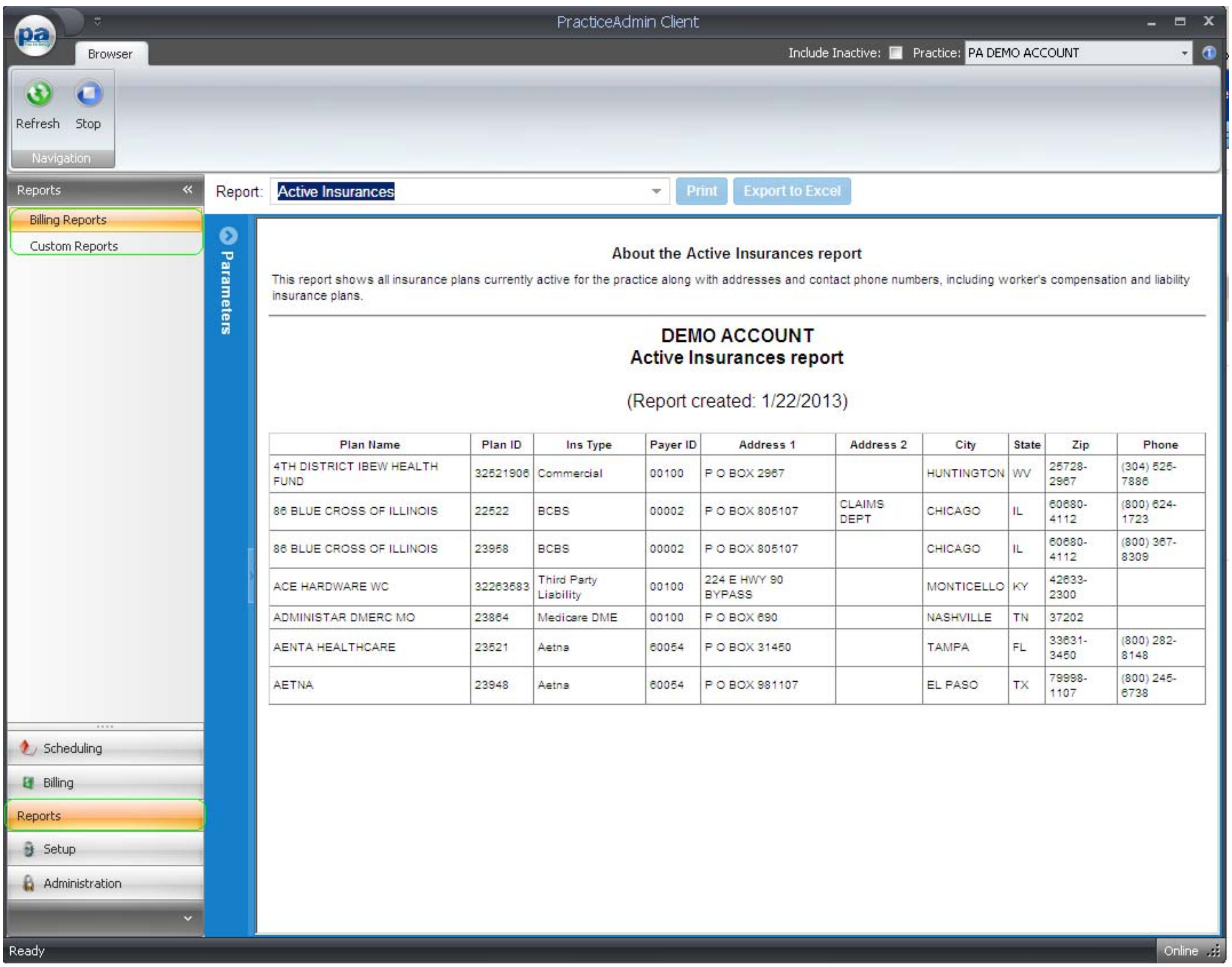
The **Add login link to your web site** hyperlink has been removed. Launch Client button has also been removed as it is no longer needed to access PA Client. Instead, from your Windows Start Menu, under All Programs in the PA folder, click on the file named PA Client (ATL) to access PA Client.

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.



Billing Reports in Client

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



Billing Reports are now available on the web site

About

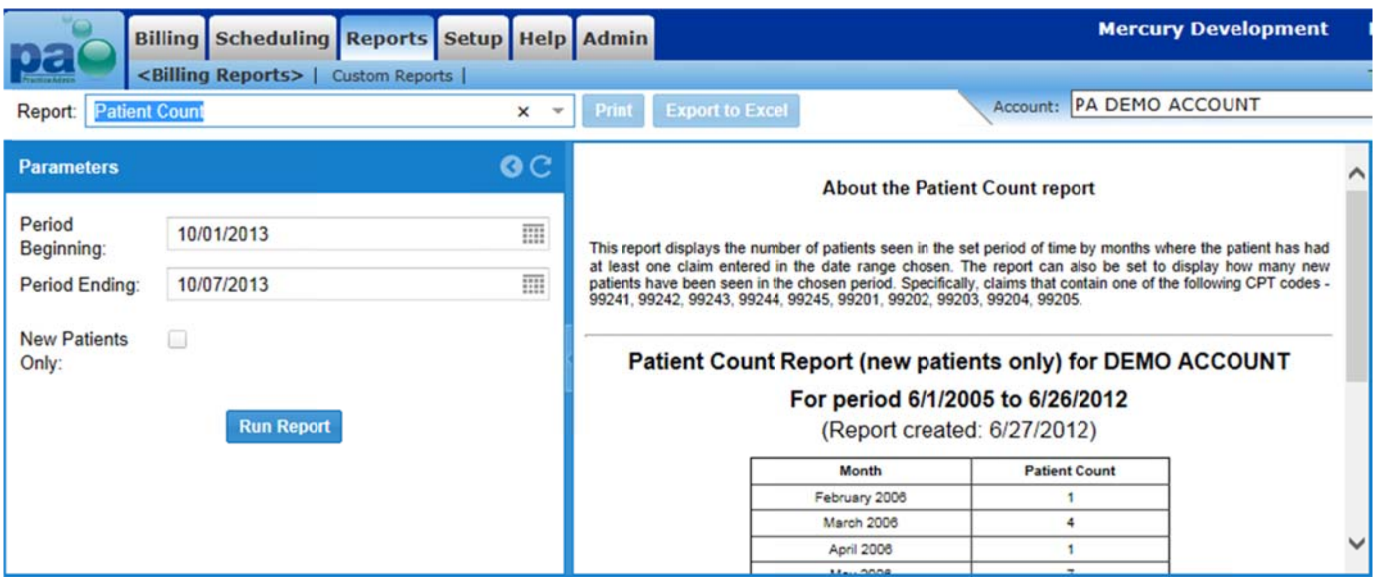
The **Reports** page allows running billing reports directly on the website and access to PracticeAdmin Reporting Services portal to run custom reports.

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



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.

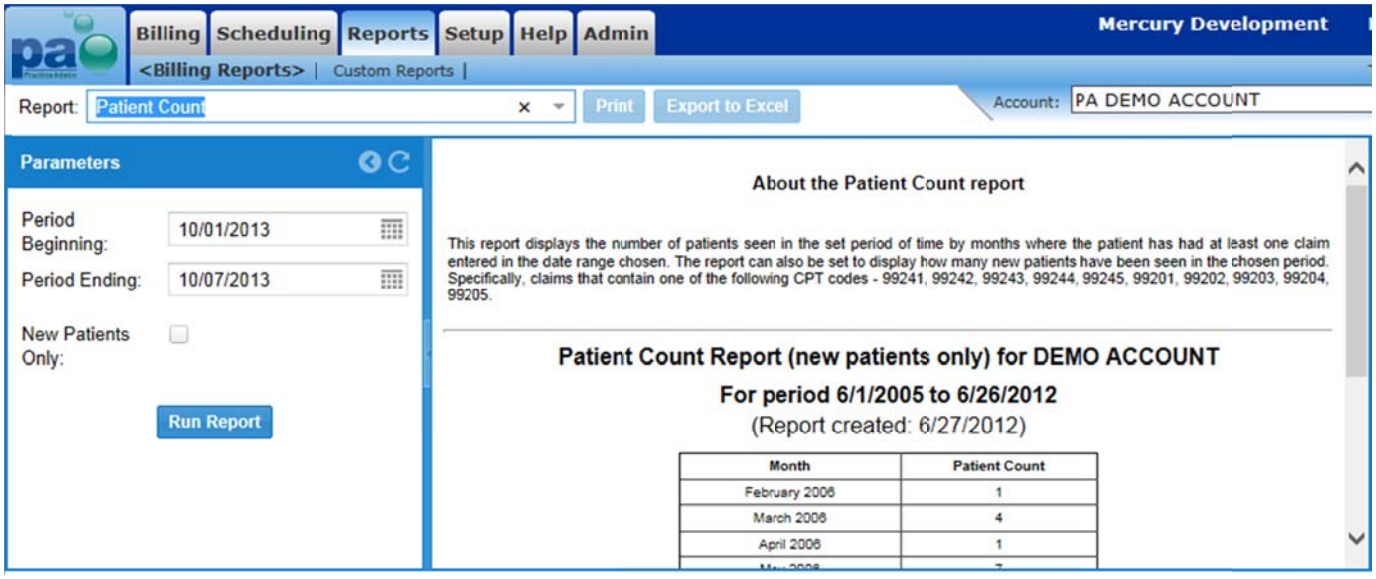
The report results section shows report previews and report results.

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.

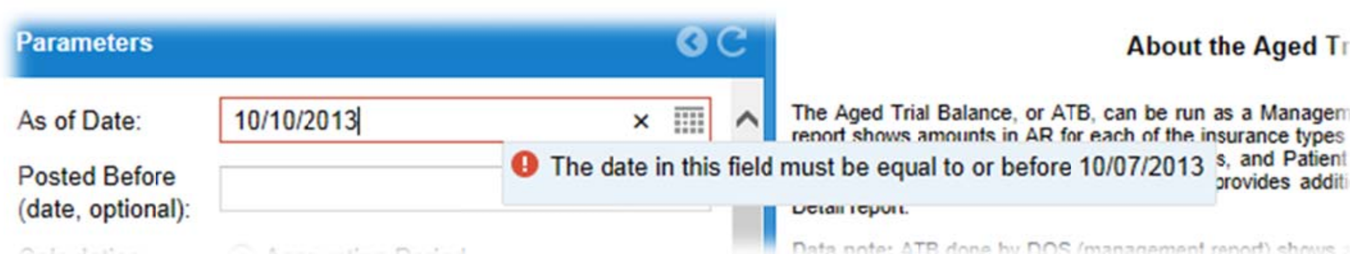
In order to enlarge the report results section, the **Parameters** pane can be collapsed by pressing the icon in its header or the delimiter between the panes.



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

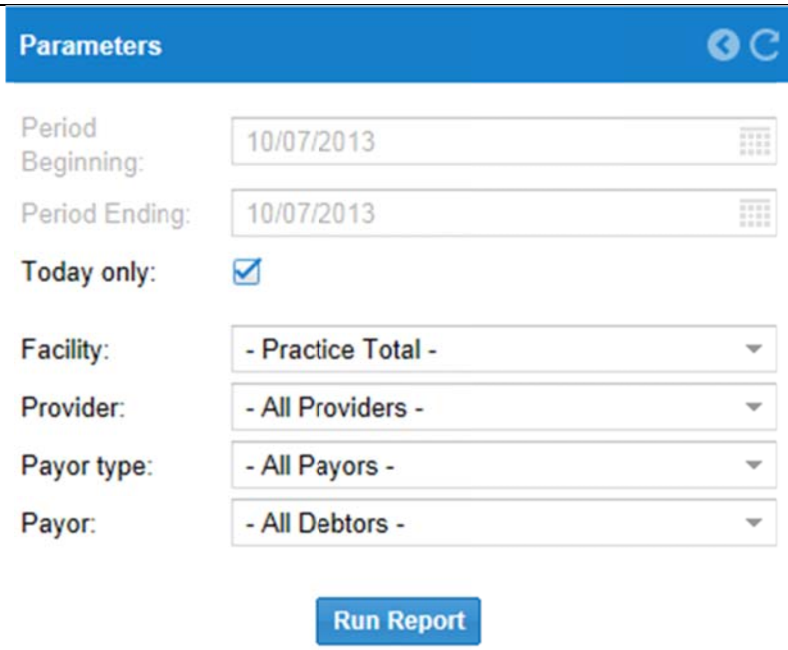
To manually expand the pane when it is collapsed, press the icon in its header.

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



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 icon in the header of the **Parameters** pane.

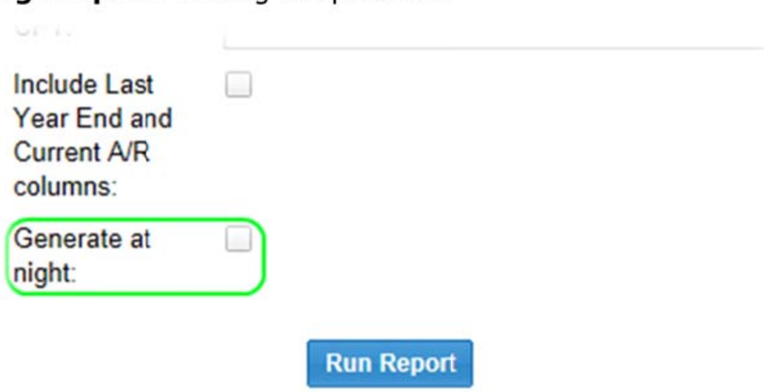
Certain reports may be executed for data posted today. To do this, check the **Today only** checkbox on the **Parameters** pane. The **Period Beginning** and **Period Ending** controls will become inactive and will show today's date.



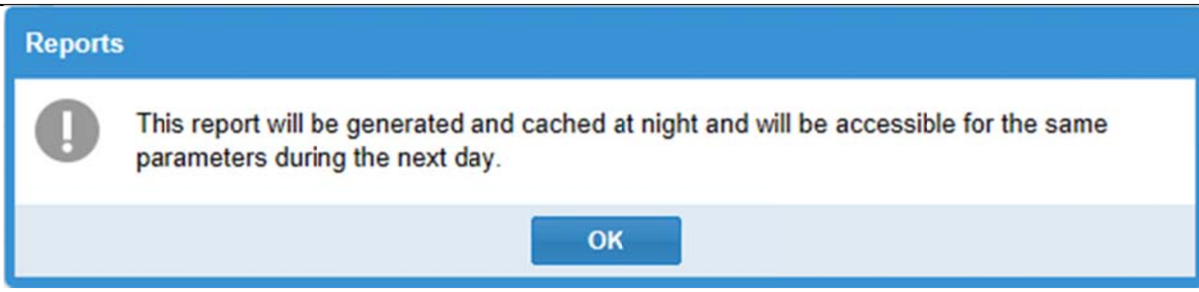
After required parameters are entered press the **Run report** button to generate the report.

Reports generated at night

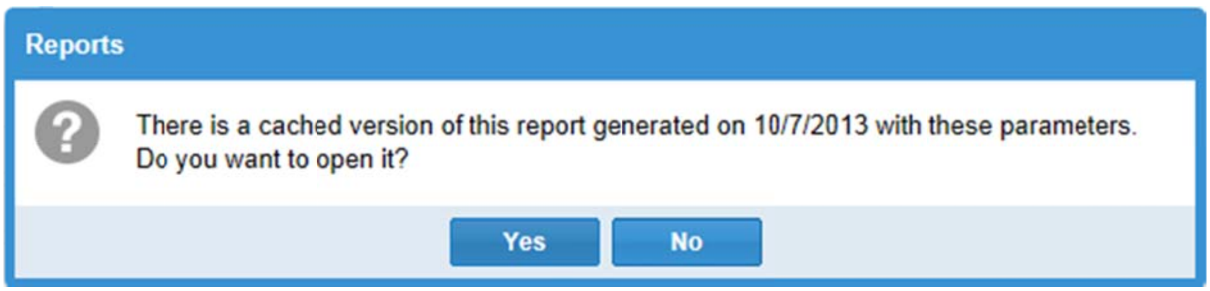
Some reports which may take considerable amount of time to be executed have the **Generate at night option** among the parameters.



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



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.

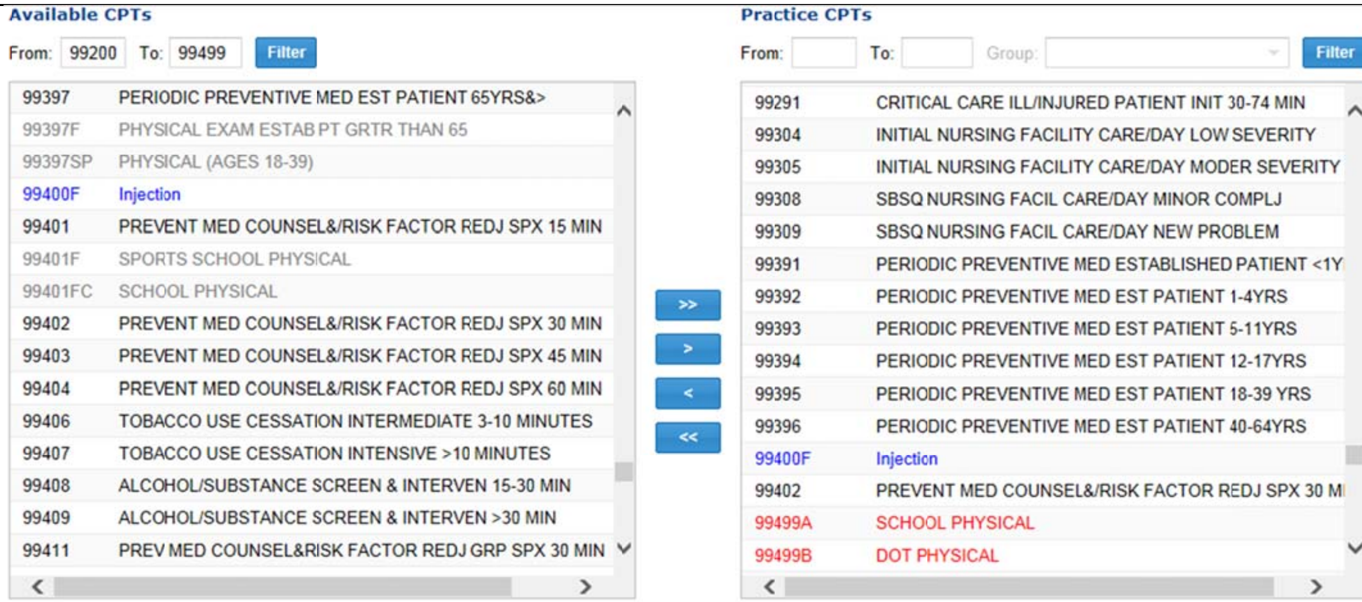
Reworked Setup - CPT Codes page

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 **CPT Groups** section).



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.

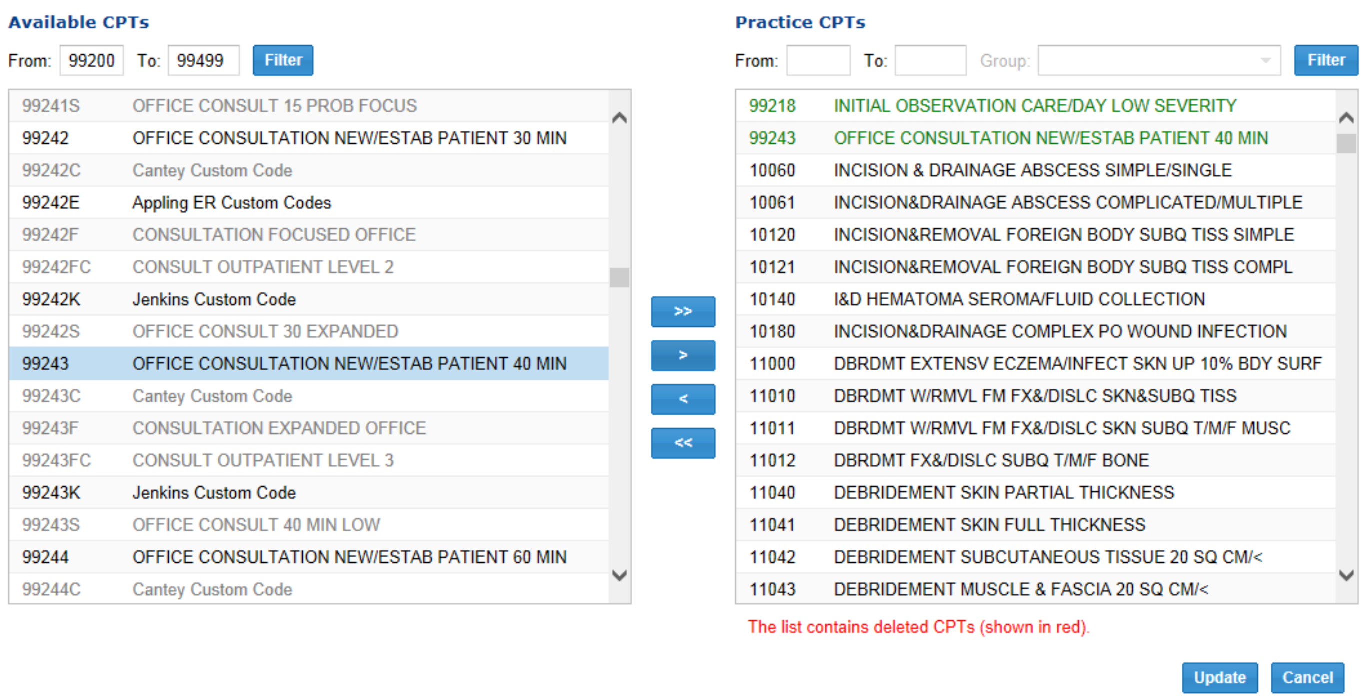
Note: To filter down to any specific CPT, type it in twice - in the **From** field and in the **To** field. It is also possible to use a part of a CPT, for example, from '99' to '993', which would bring up all codes from 99000 to 99299.

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 CPT Groups 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.

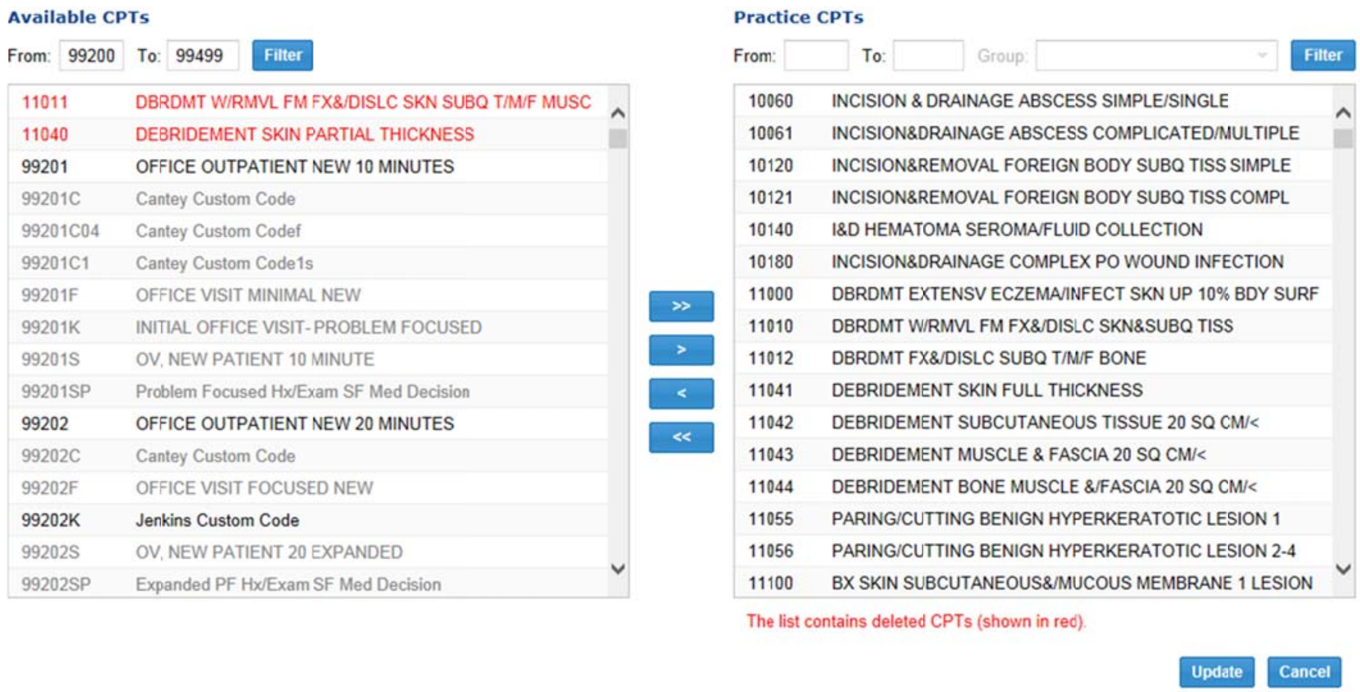


Note: If the **Practice CPTs** grid is filtered down to any particular CPT group, the codes will be linked to this group when adding to the practice.

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).
4. 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.

8. Confirm the changes by pressing the **Update** button.



Moving CPTs to a CPT group

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

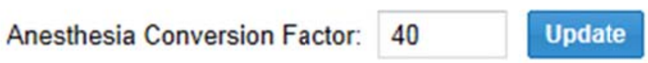
1. Enter a range of CPTs in the **From** and **To** fields above the **Practice CPTs** grid.
2. Select any particular group in the **Group** dropdown to display CPTs of this this group only. To filter down to CPTs not linked to any group, select the *–Out-of-group CPTs-* item.
3. Press the **Filter** 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.

Removing CPTs from 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 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.

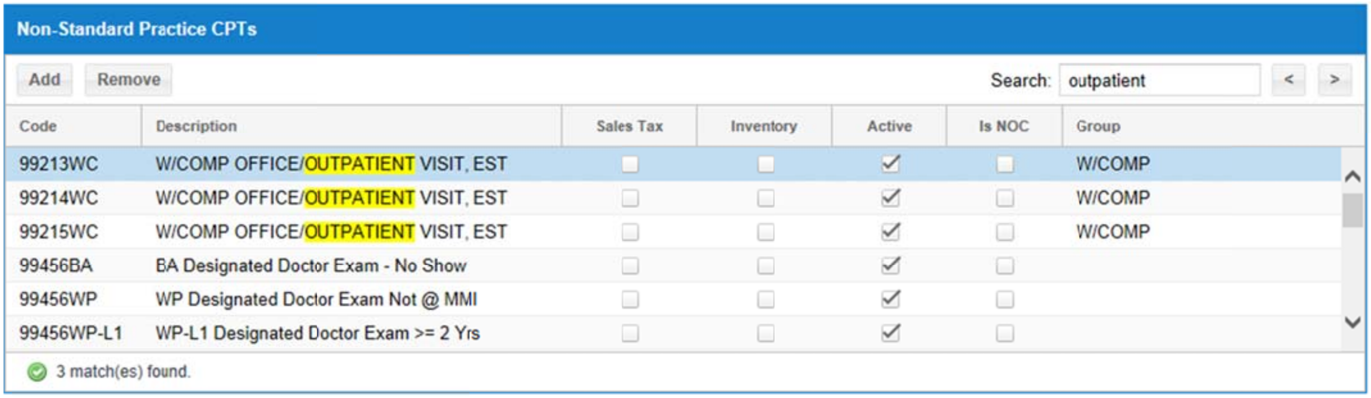
If the practice is setup to do anesthesia claims, the **Anesthesia Conversion Factor** field will be displayed. The conversion factor is the number of dollars that will be calculated per anesthesia unit.



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

Non-standard Practice CPTs section

The section allows adding custom CPTs to the practice.

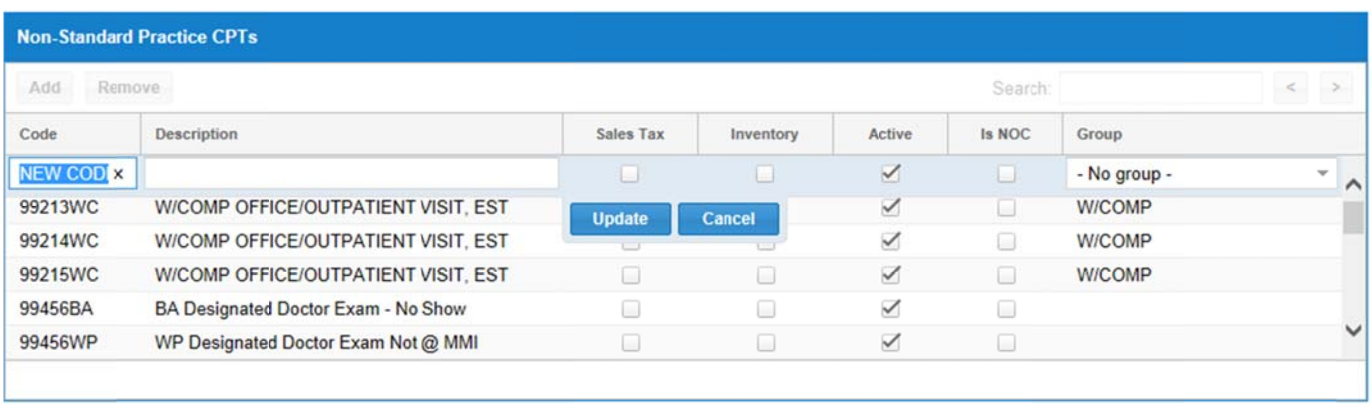


The grid displays non-standard CPTs created for the practice.

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.

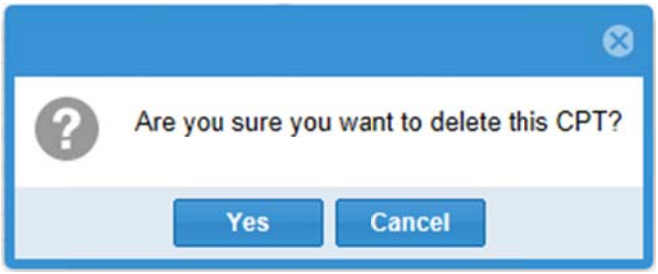
Adding non-standard CPT code to practice

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.

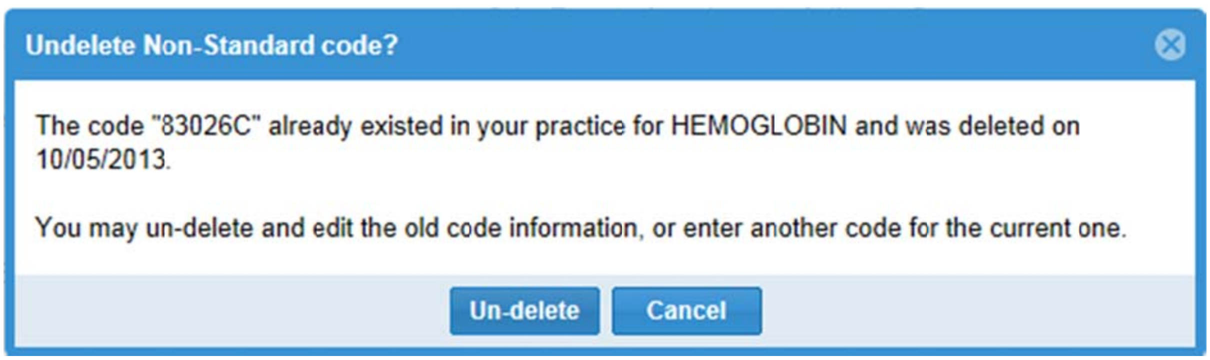


Removing non-standard CPT code from practice

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:



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

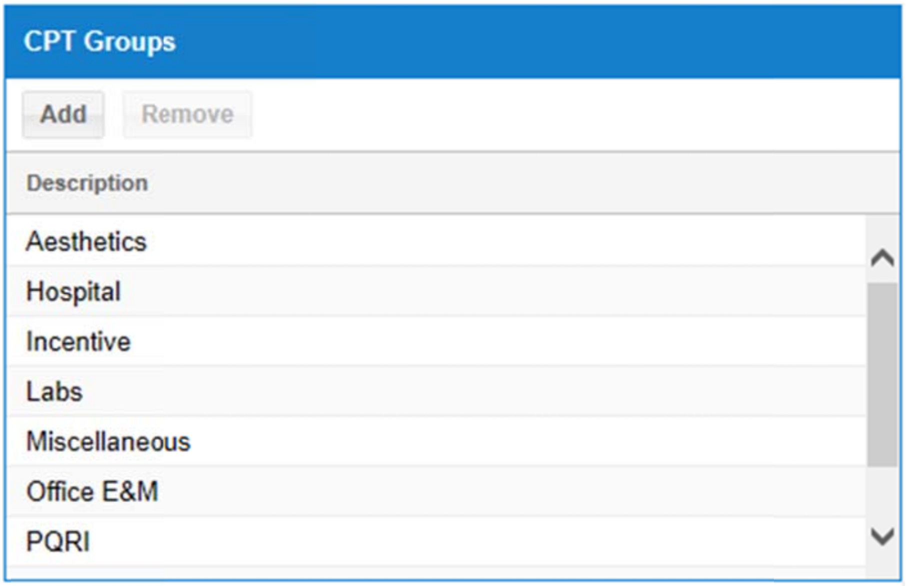
1. Double click on the line with a CPT code.
2. Modify the fields. For example, to link the code to a CPT group (if they exist for the practice - see the **CPT Groups** section), select it in the **Group** dropdown.
3. Confirm the changes by pressing the **Update** button.

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.

CPT Groups section

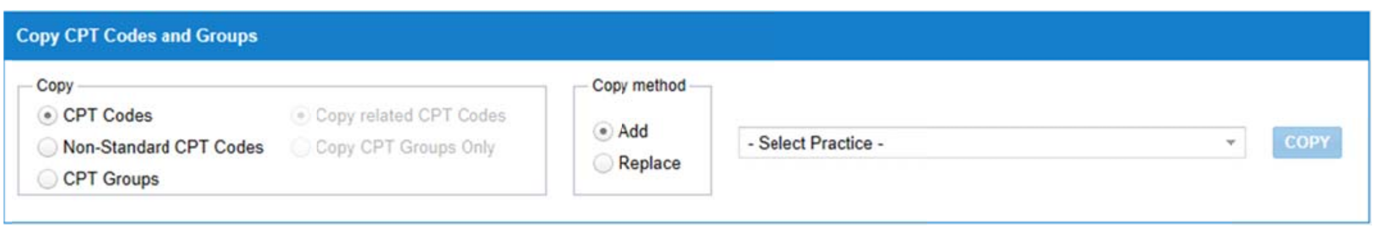
The section allows adding CPT groups to the practice.



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

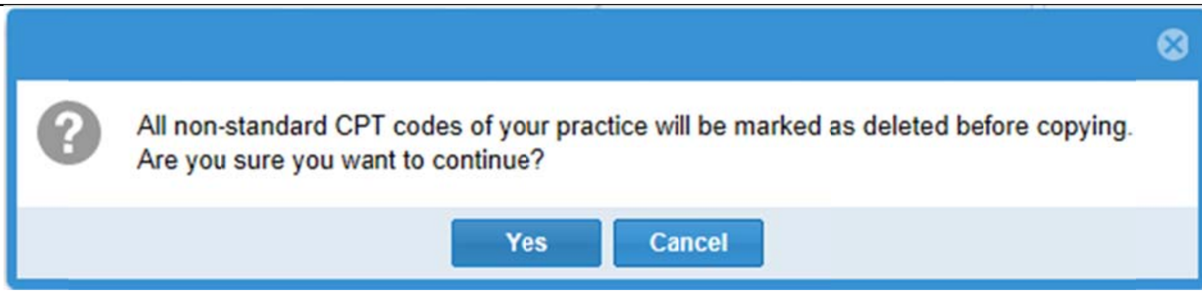
Copy CPT Codes and Groups section

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



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.



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

Copying CTP groups

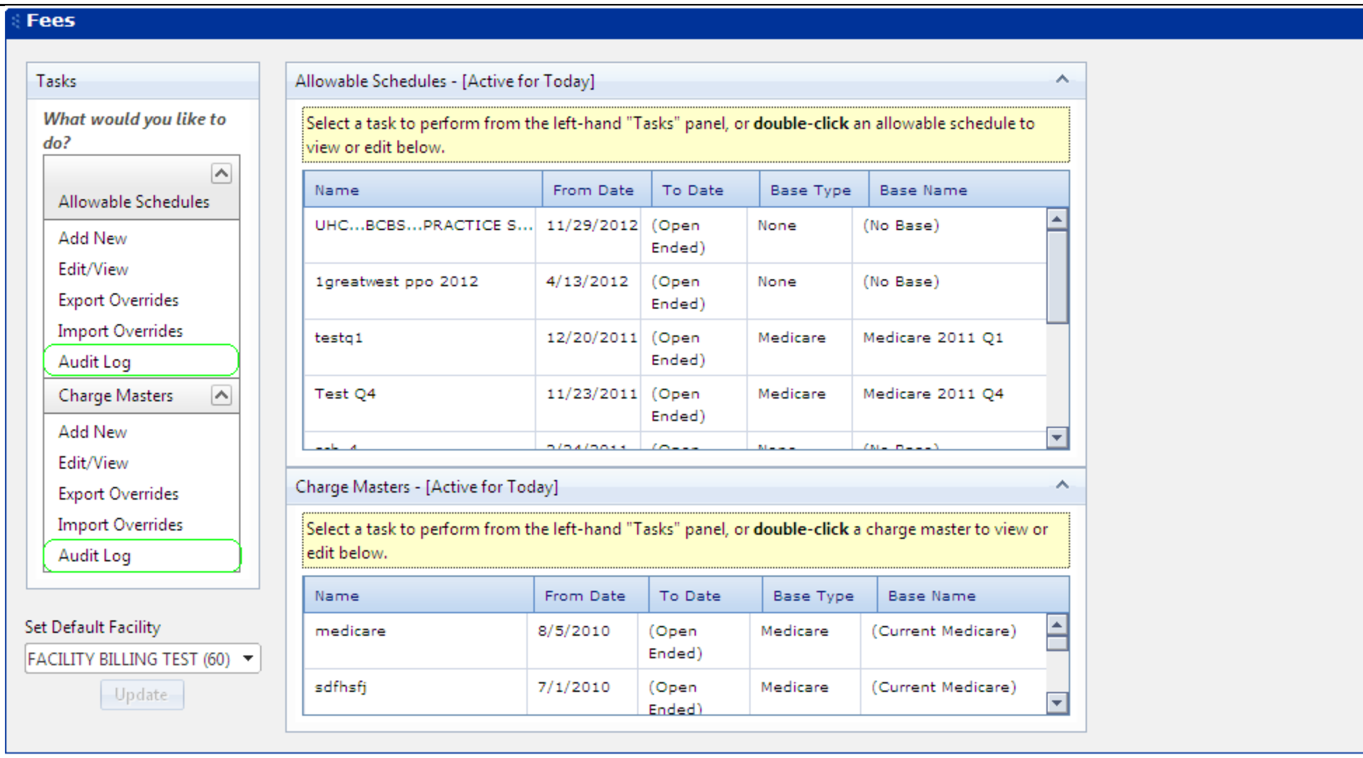
1. Select **CTP Groups** in the **Copy** area.
2. Select the **Copy related CPT codes** option to copy all codes included in the groups. To copy groups without related code select the **Copy CPT Groups Only** option.
3. Specify how the groups should be copied in the **Copy method** area:
   - **Add** - 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.

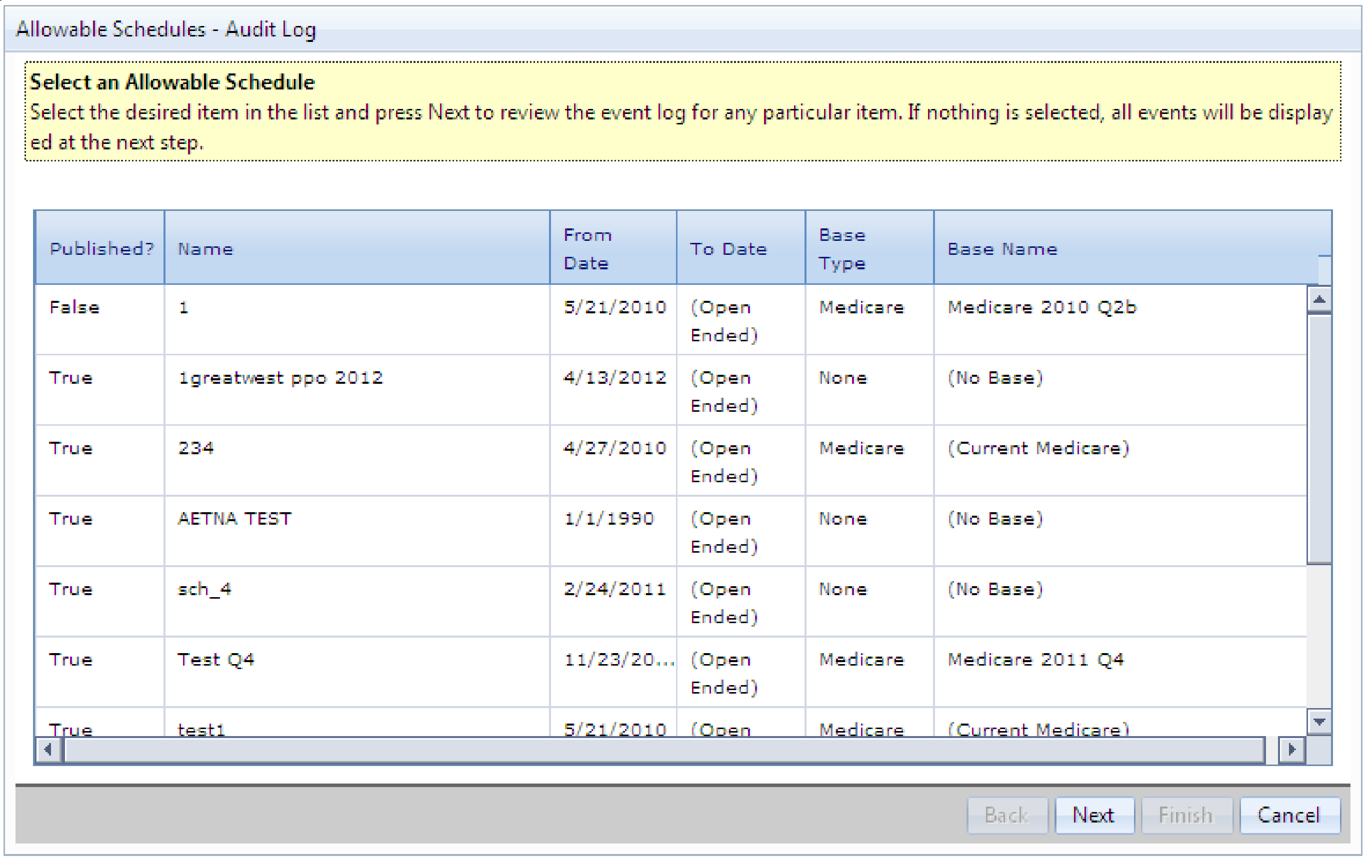
The log can be reviewed using the Audit Log menu available for both allowable schedules and charge masters.



Audit Log is represented as an additional wizard 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.



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.

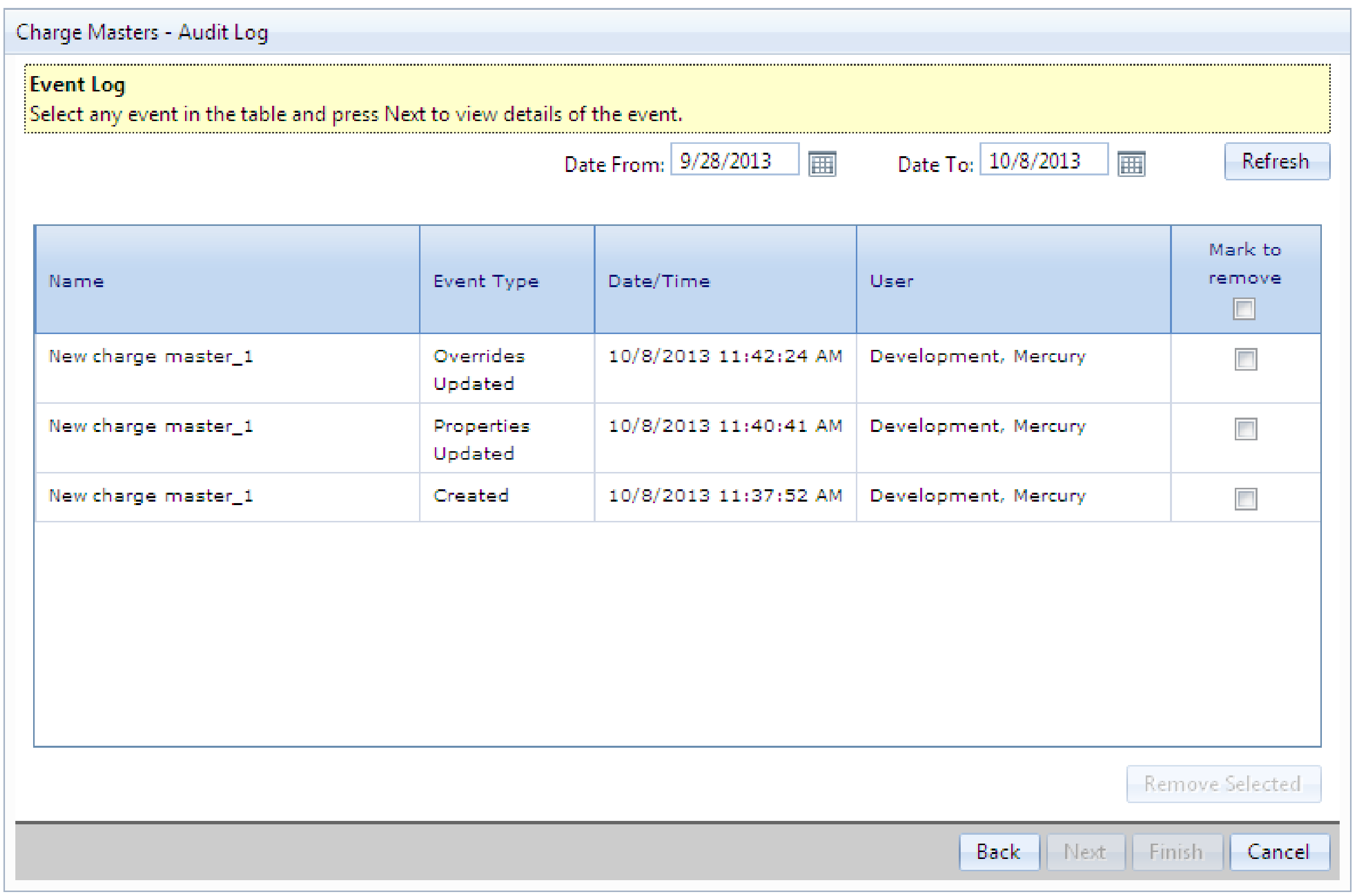
The event list provides the following information:

- 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.



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.

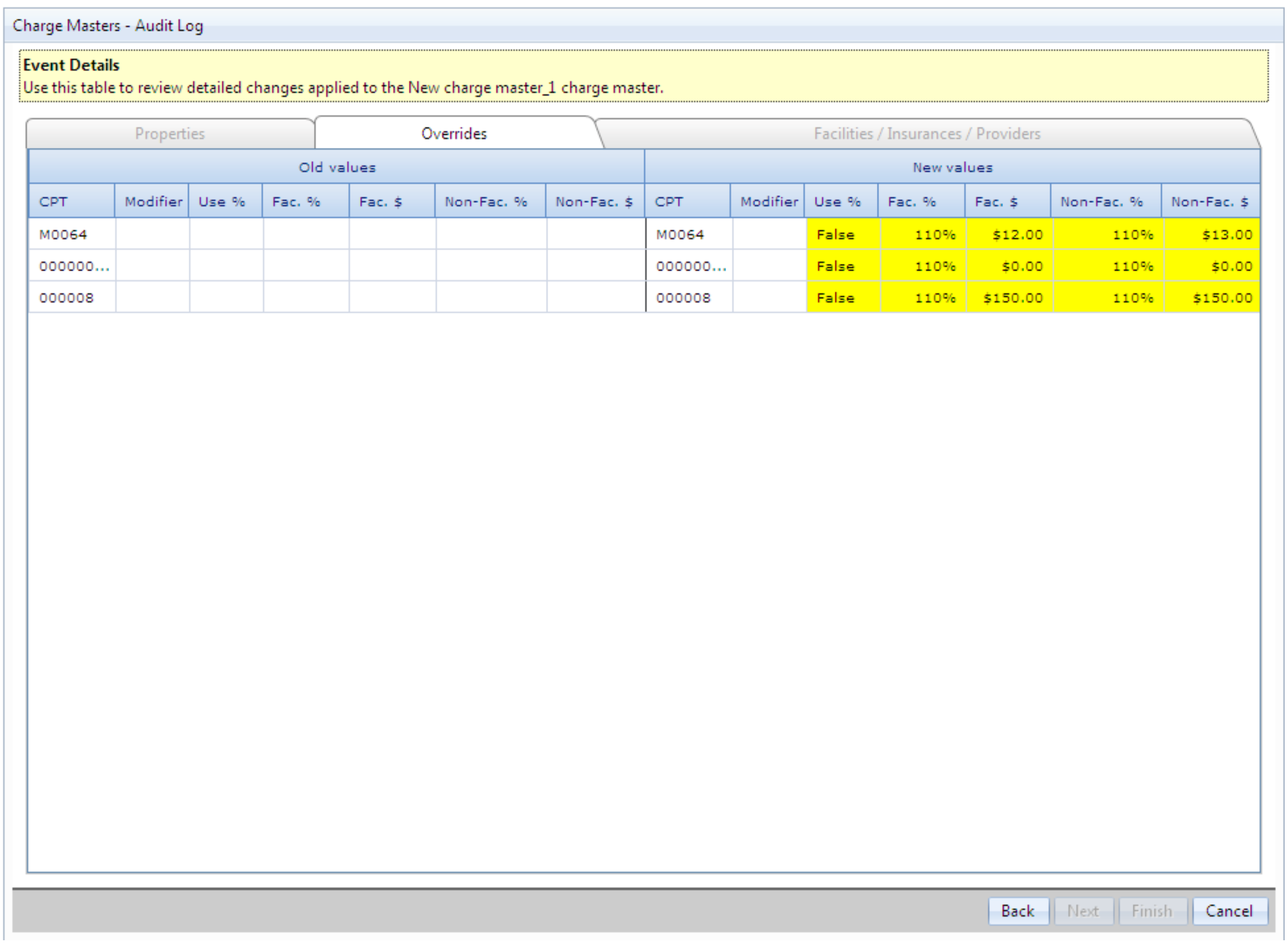
The Event Details step contains the detailed changes logged for the selected event. This step contains 3 sub-tabs for different details: Properties, Overrides, and Facilities/Insurances/Providers. Each sub-tab lists all updates performed for the corresponding category during the event.

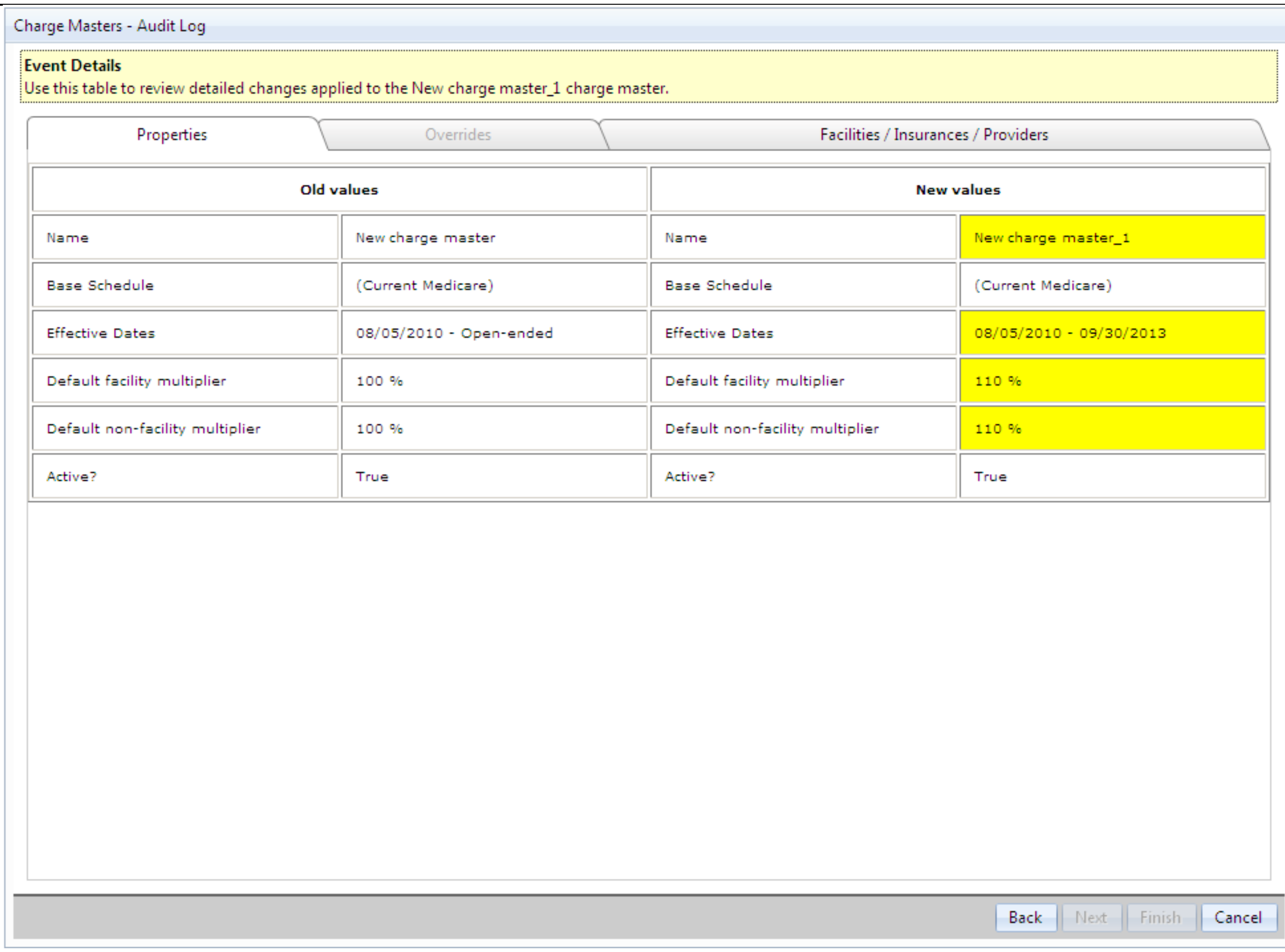
The Item Created event does not have any details to review, and all Event Details sub-tabs will be empty.

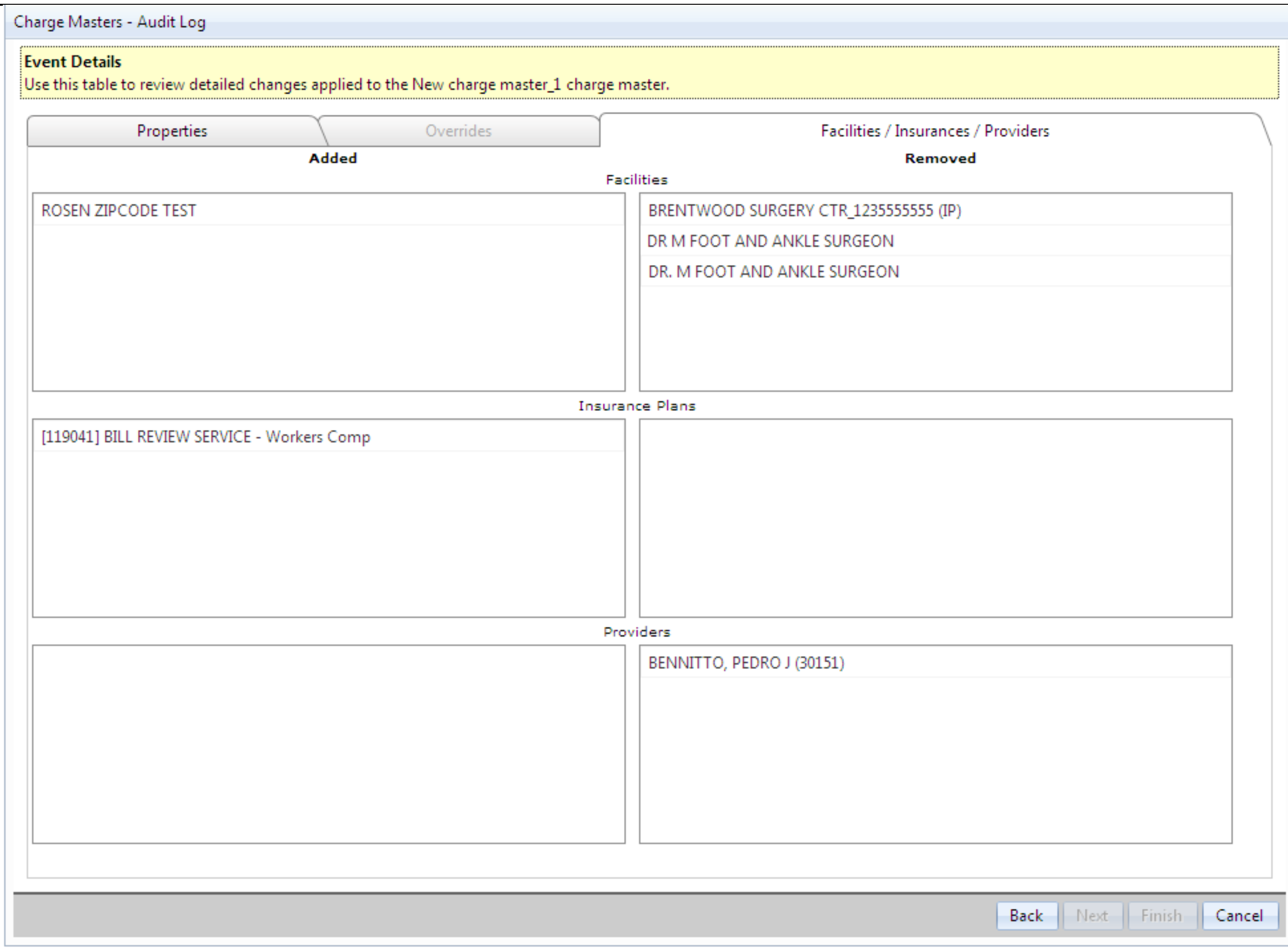
The Properties Updated event will have old and new values listed in the Properties sub-tab with updated or changed values highlighted in yellow color in the New Values area. Details about updated lists of associated facilities, providers, and insurance plans will be listed on the separate Facilities/Insurances/Providers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



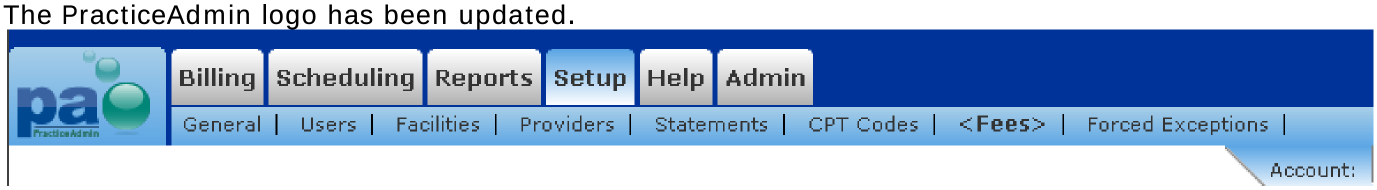

Charge Masters - Audit Log
Event Details
Use this table to review detailed changes applied to the New charge master_1 charge master.
Properties
Overrides
Facilities / Insurances / Providers
Old values
New values
Name
New charge master
Name
New charge master_1
Base Schedule
(Current Medicare)
Base Schedule
(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



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.



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.

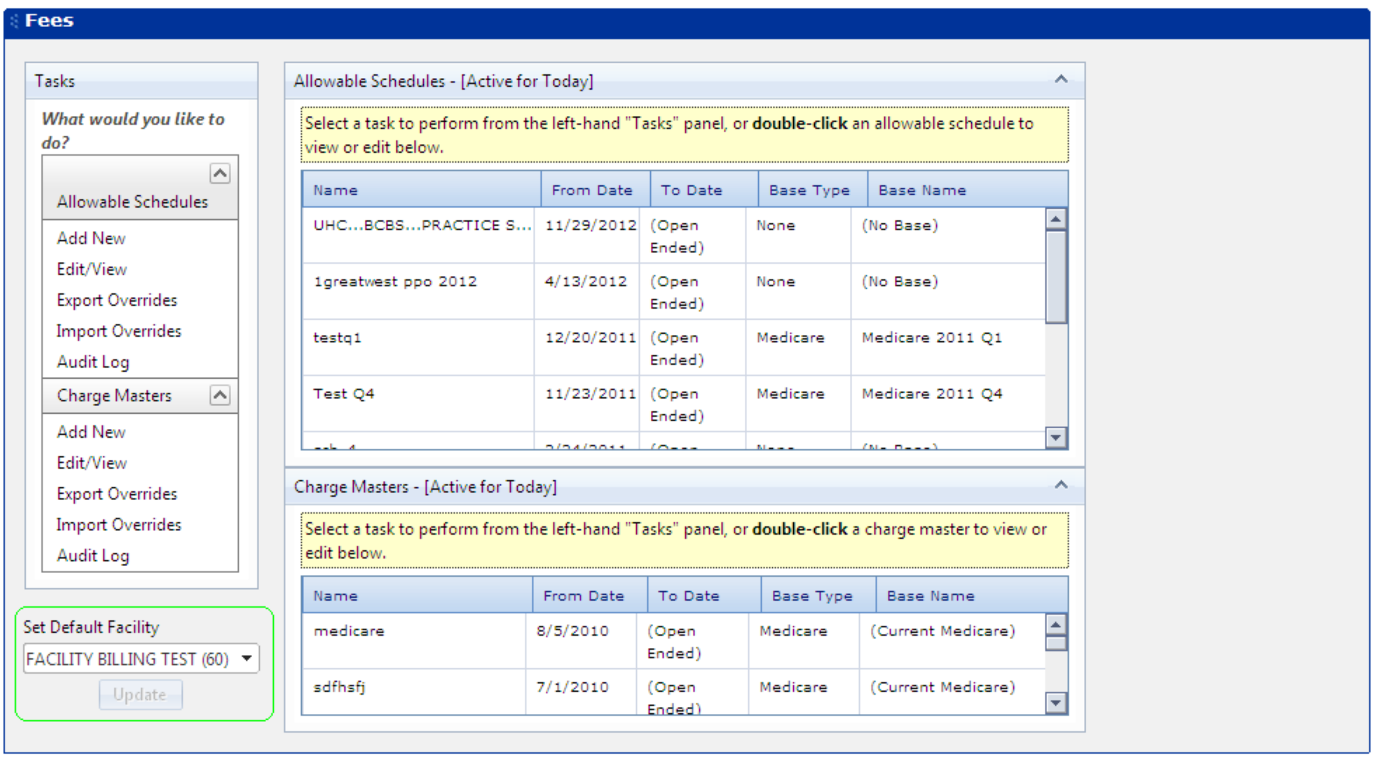
Default Facility setting moved to the Setup - Fees page

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.

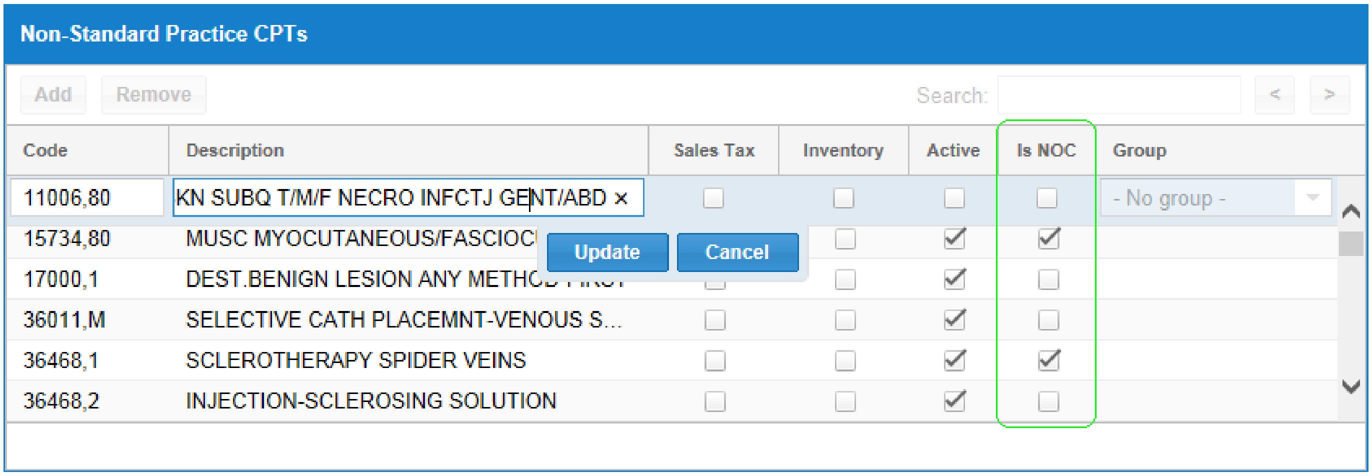
To reassign default facility, select any item in the list other than the currently assigned facility and click the Update button.

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



Is NOC option for Non-Standard CPT codes

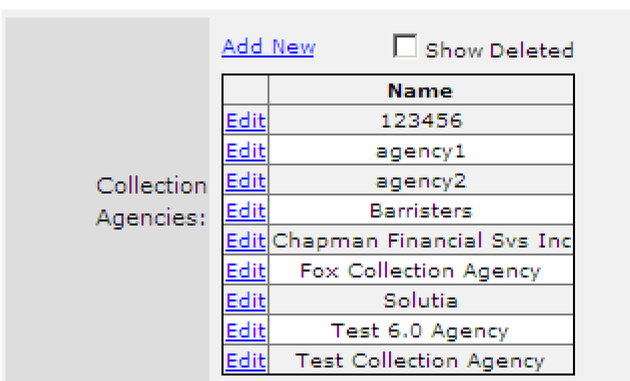
All non-standard CPT codes now have the **Is NOC** option. The **Is NOC** option is available for all listed non-standard codes after the Active option.

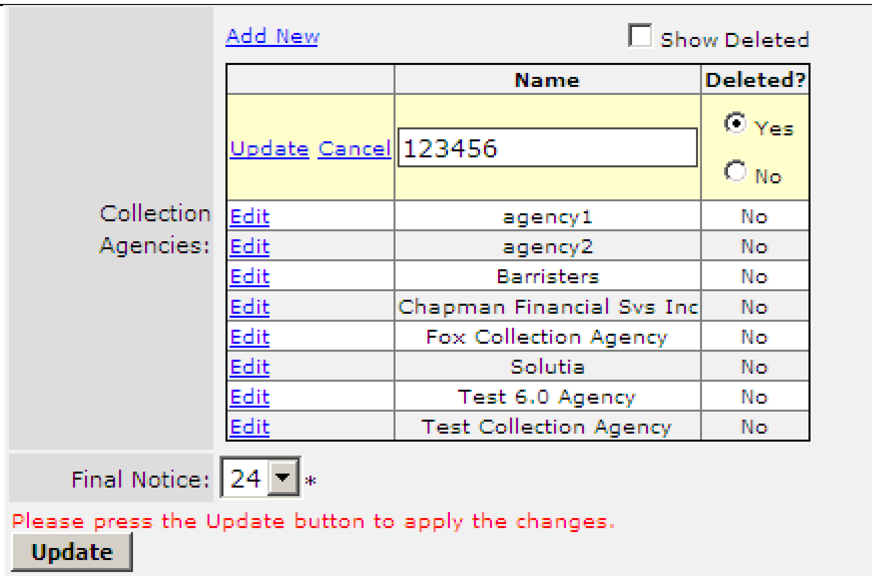


Improved collection agency management

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.

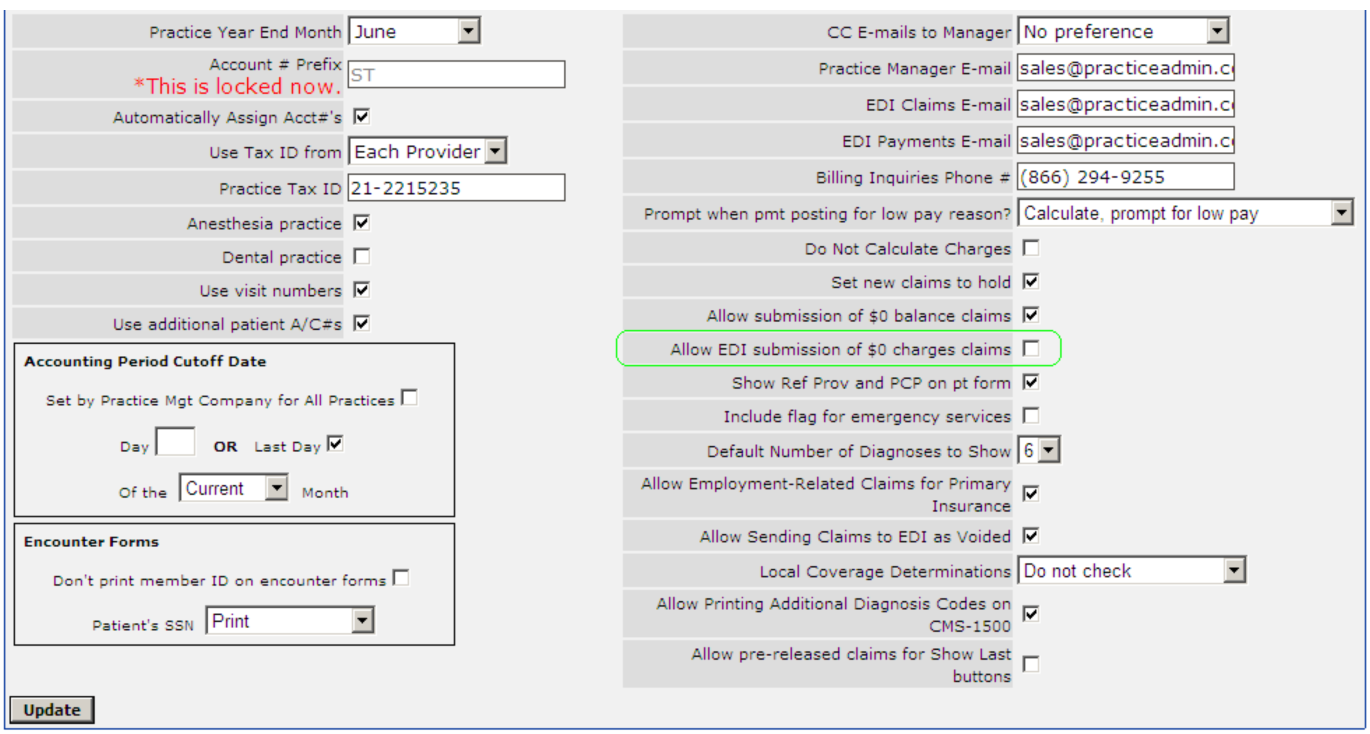
Deleted collection agencies can be displayed by checking the Show Deleted checkbox on the Setup - Statements page.





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.



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

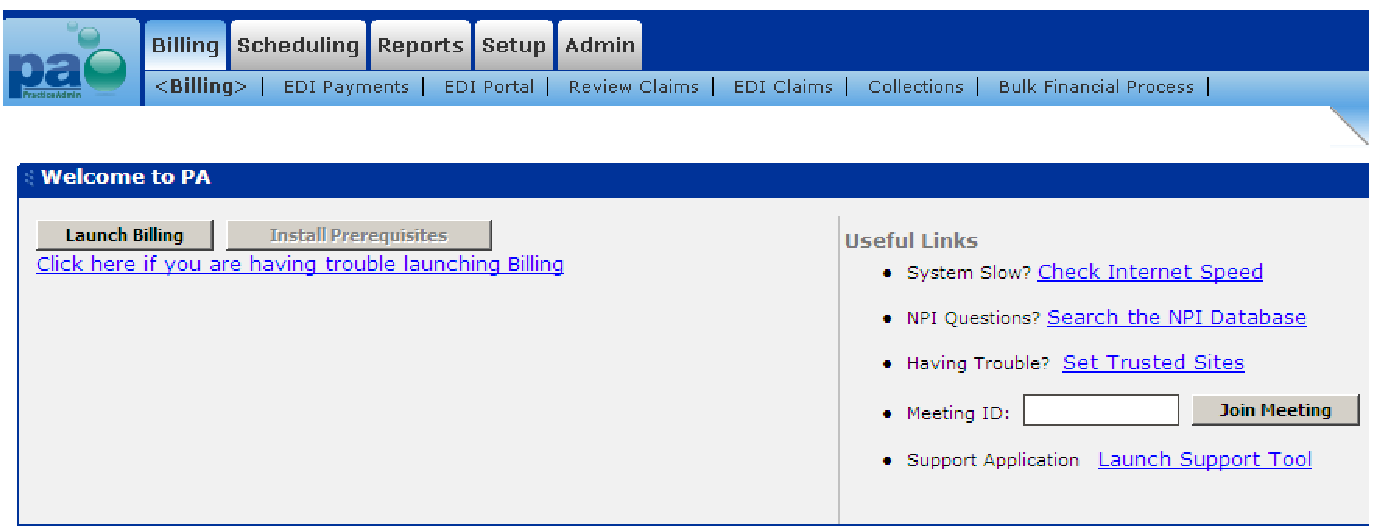
Order of sub-tabs on the Billing tab has been changed to the following:

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

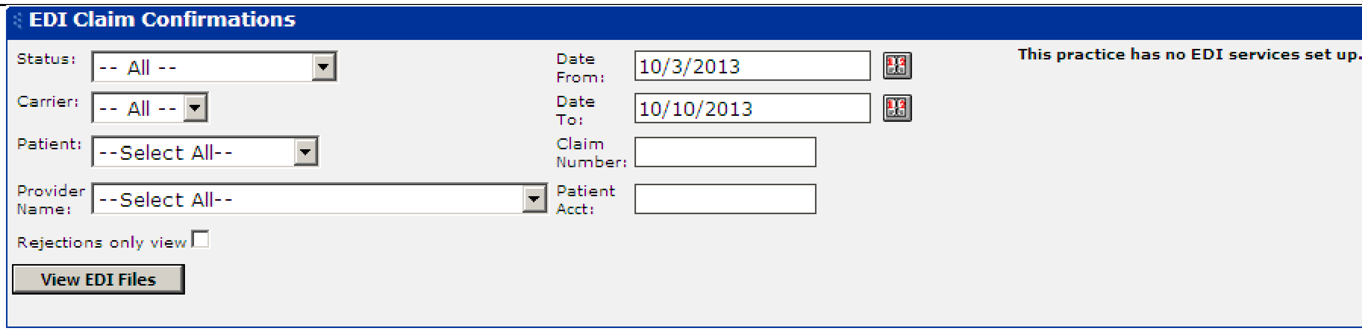
The **Check Internet Speed** and the **Search the NPI Database** hyperlinks on the Billing - Billing sub-tab are now opened in a new browser window when clicked.

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.



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.



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

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**

2. For EDI Payments sub-tab:
   Electronic Remittance Advice -> **EDI Payments**

3. 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.

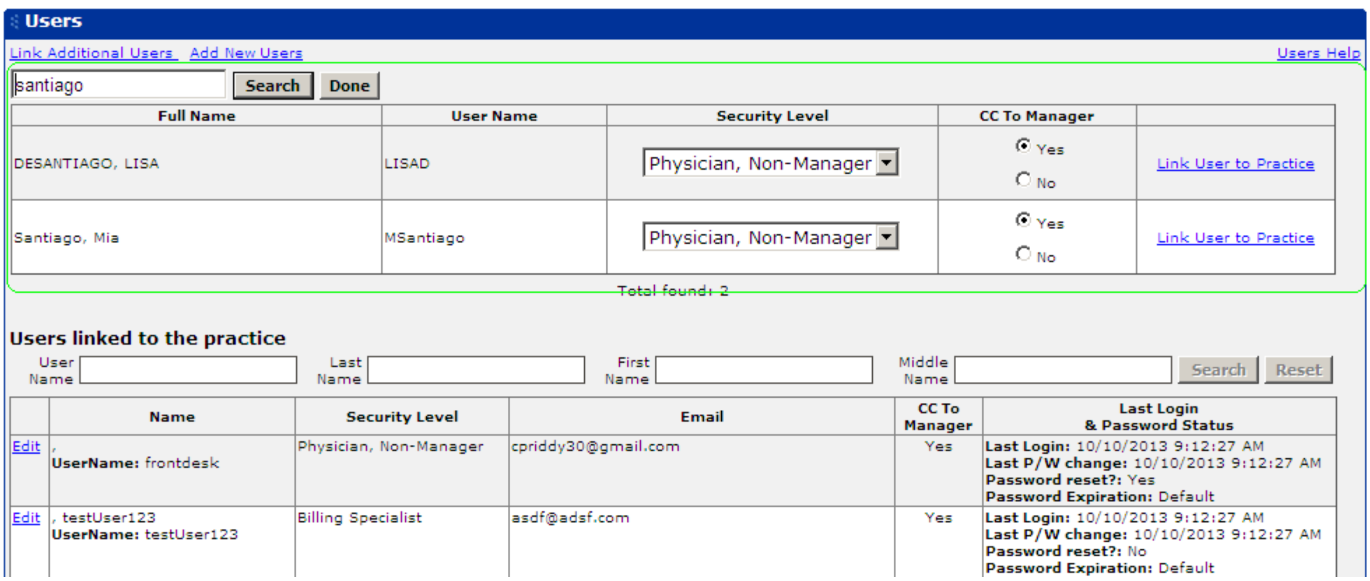
Linking users to the current practice

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.

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



Ability to search users linked to the practice

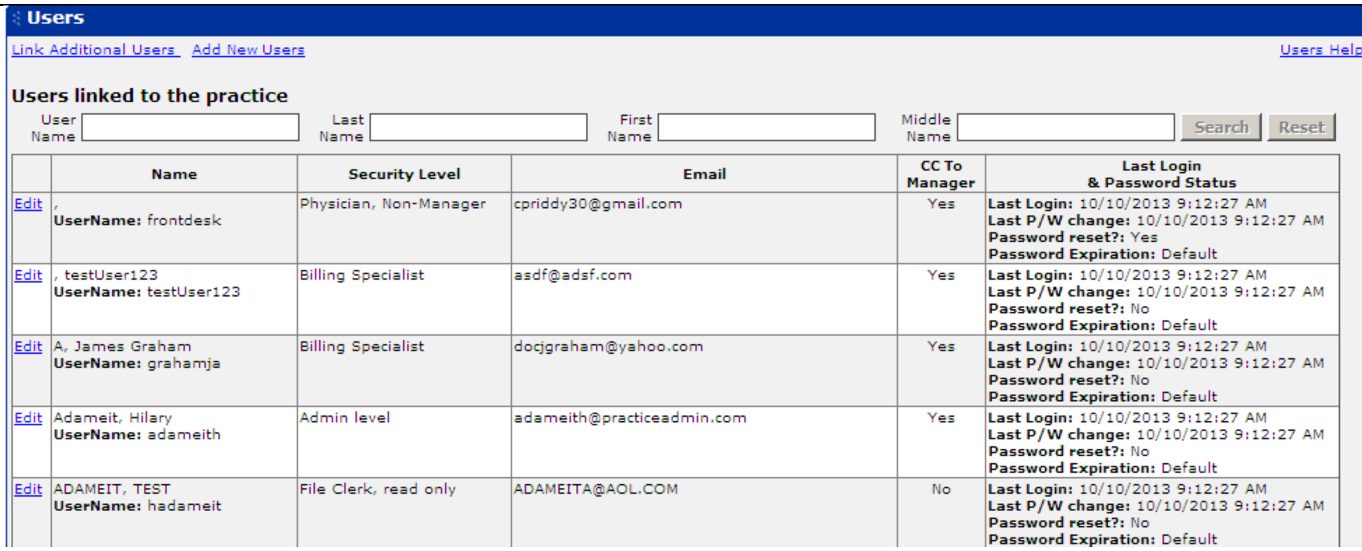
Now users linked to the practice can be searched from the Setup - Users page instead of browsing through the full lit of linked users.

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.



Check for unique email address when adding or editing users

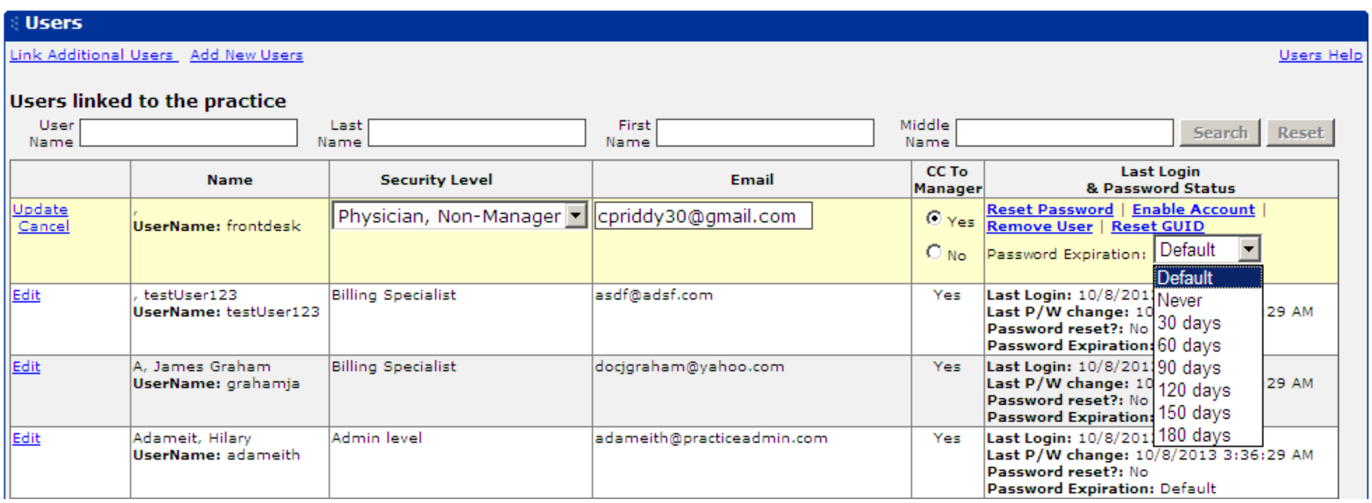
User's emails are now checked to be unique when a new user is added or an existing user is edited.

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.



Setup - Facilities page updated

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

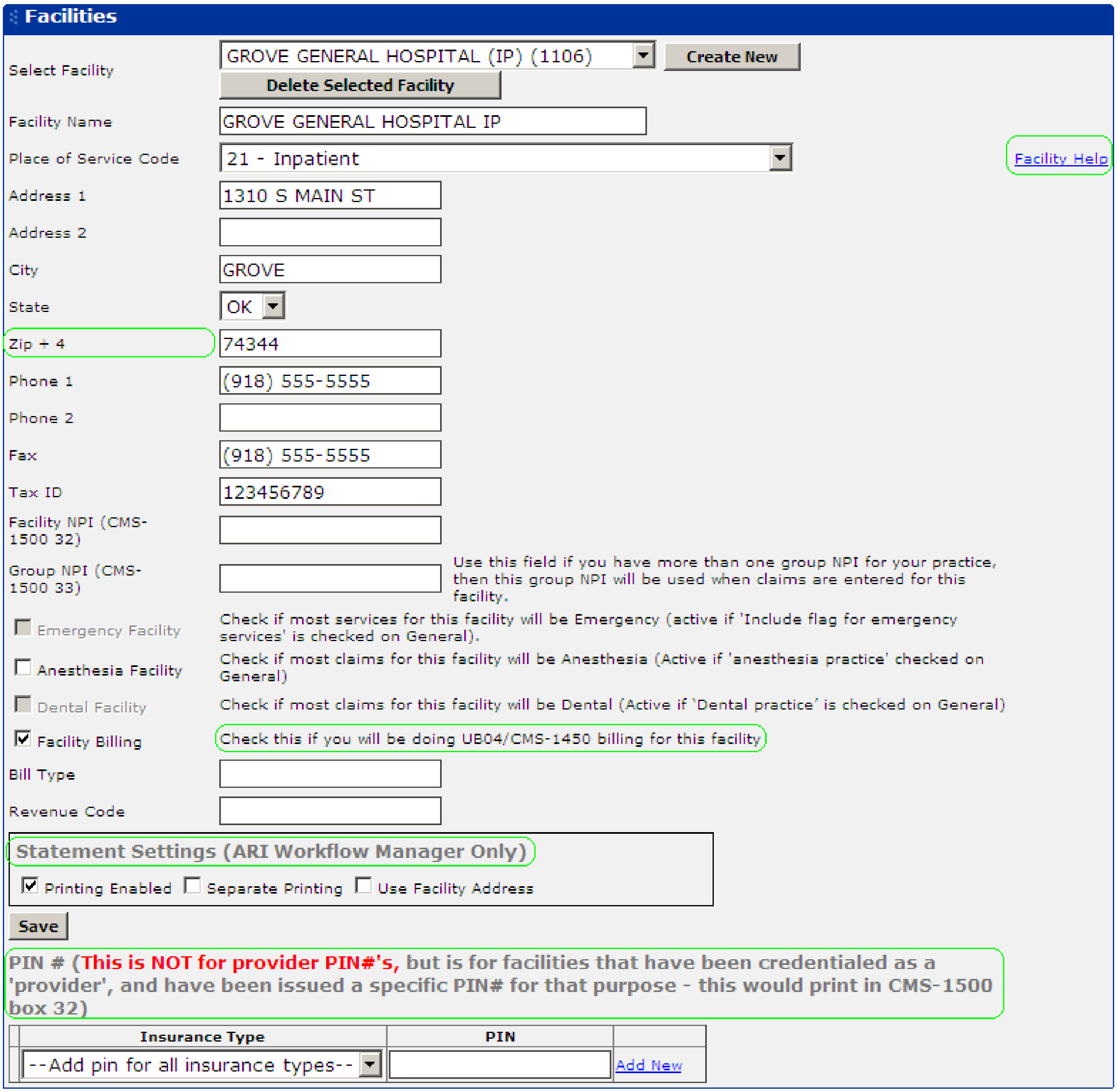
Help -> **Facility Help**

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**)


Facilities
Select Facility
GROVE GENERAL HOSPITAL (IP) (1106)
Create New
Delete Selected Facility
Facility Name
GROVE GENERAL HOSPITAL IP
Place of Service Code
21 - Inpatient
Facility Help
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
Separate Printing
Use Facility Address
Save
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)
Insurance Type
PIN
--Add pin for all insurance types--
Add New

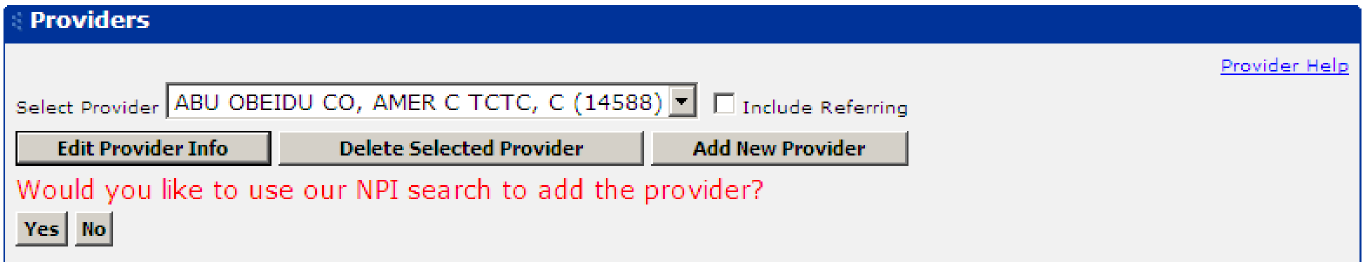
Setup - Providers page updated

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.



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.