SuiteMed
Beyond EMR

Objectives & Goals – Authorization & Referral Tracking

- Setup Procedures that Require Authorizations
- Setup Authorization Type
- Setup Authorization & Referral Status & Forms
- Enter and Track Authorizations
- Enter and Track Referrals

Hot Keys

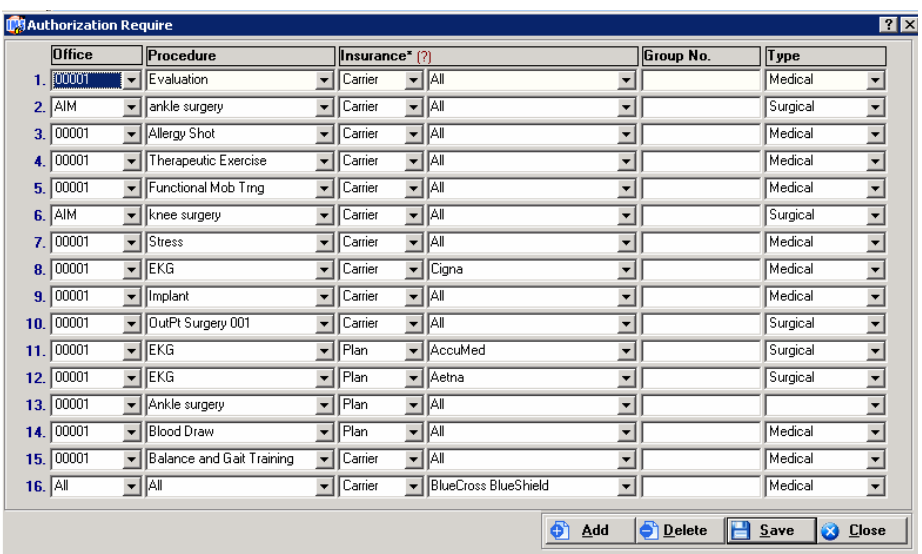
F2 - Patient Master
F4 - Open Data Entry (Edit) Window
F6 - Charge Posting
F8 - Insurance Receipt
F10 - Check In/Out
Ctrl + F3 - Patient Note
Ctrl + F9 - Collections

F3 - Select Patient
F5 - Open Search Window
F7 - Claim
F9 - Schedule
Ctrl + F2 - Reminder
Ctrl + F6 - Patient Ledger

Setup Procedures That Require Authorization

There are two ways you can do this:

Setup>>Scheduler>>Procedure and click the Authorization required icon on selected procedures.
Setup>>Other>>Authorization Required


Authorization Require

	Office	Procedure	Insurance* (?)		Group No.	Type
1.	00001	Evaluation	Carrier	All		Medical
2.	AIM	ankle surgery	Carrier	All		Surgical
3.	00001	Allergy Shot	Carrier	All		Medical
4.	00001	Therapeutic Exercise	Carrier	All		Medical
5.	00001	Functional Mob Trng	Carrier	All		Medical
6.	AIM	knee surgery	Carrier	All		Surgical
7.	00001	Stress	Carrier	All		Medical
8.	00001	EKG	Carrier	Cigna		Medical
9.	00001	Implant	Carrier	All		Medical
10.	00001	OutPt Surgery 001	Carrier	All		Surgical
11.	00001	EKG	Plan	AccuMed		Surgical
12.	00001	EKG	Plan	Aetna		Surgical
13.	00001	Ankle surgery	Plan	All		
14.	00001	Blood Draw	Plan	All		Medical
15.	00001	Balance and Gait Training	Carrier	All		Medical
16.	All	All	Carrier	BlueCross BlueShield		Medical

Add | Delete | Save | Close

Click add and select the office, desired procedure, insurance carrier or plan, group number (if applicable) and type of procedure that you are requiring authorization for here.

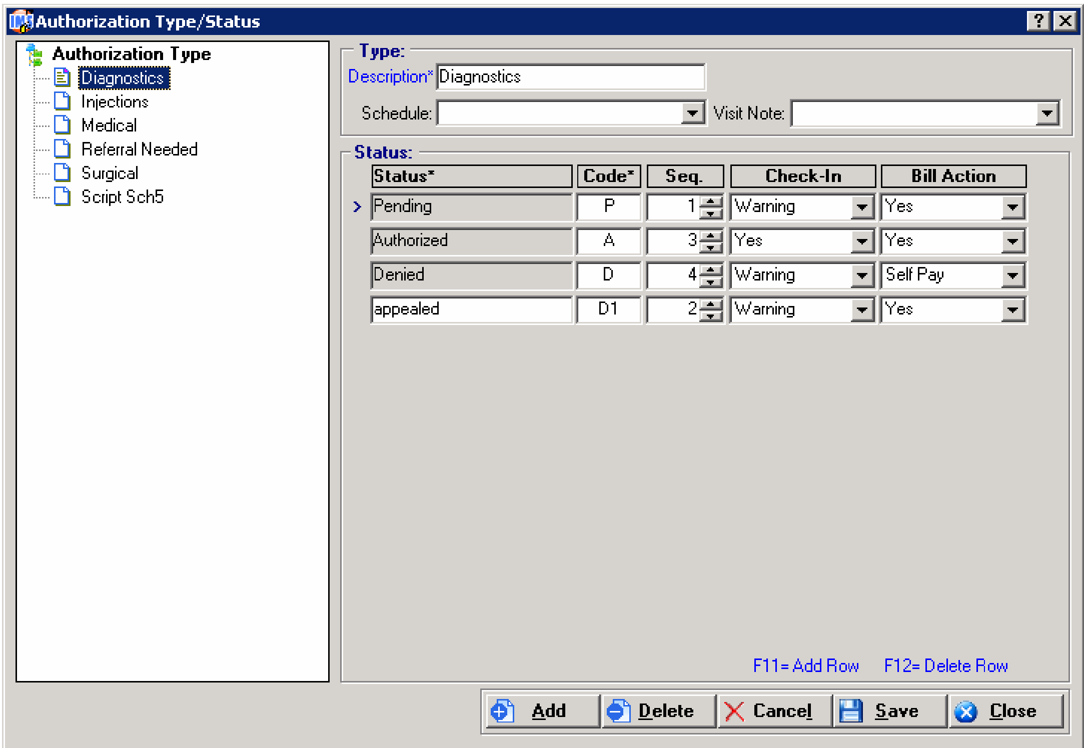
You can also delete any that are no longer needed.

Hit save when done.

NOTES:

Setup Authorization Type and Status

Setup>> Other>> Authorization Type/Status



Here you can create the type of authorizations, default letters/forms, check in or billing warnings.

Click Add to create a new Authorization type.

Description – description of the Authorization type – medical, surgical, etc.

Schedule – this is the default letter that you want to use for this authorization type whenever you print from Authorization Tracking screen, for authorization created from AP(Appt.) or W(Walk In) or AW(Appt. Waiting) or M(Manual).

Visit Note – this is the default letter that you want to use to print authorizations that are created from V(Visit Note).

NOTES:

Status – Hit F11 to add rows to the status columns. Status rows are the various categories you want to use as you process an authorization through the steps to get it approved. The gray status options are system defaults and cannot be changed or deleted.

Code – an internal code to quick reference the status.

Check-In Action –

- If Check In Action is set to "No" when this authorization type and status is selected then the system will not allow the patient to Check In.
- If Check In Action is set to "Yes" when this authorization type and status is selected then the system will allow the patient to Check In. (System will not warn you for authorization status while Check In the patient).
- If Check In Action is set to "Warning" when this authorization type and status is selected then the system will warn you for the authorization status while Check-in the patient. Yes will allow you to Check In and No will not allow you to Check In the patient.

Bill Action -

- Bill Action is set to "No" when this authorization type and status is selected then the system will not allow a user to generate a bill for this patient.
- If Bill Action is set to "Yes" when this authorization type and status is selected then the system will allow the user to generate bill for this patient. (System will not warn you for authorization status while generating a bill for the patient).
- If Bill Action is set to "Self Pay" when this authorization type and status is selected then the system will set Bill Charges as Self Pay for this patient.

Setup Authorization/Referral Forms to Be Filled

Setup>>Other>>Auth/Referral Forms To Be Filled

Here you can scan or attach the default forms you want to use for you insurance carriers and doctors in requesting authorizations and referalls.

Select the office and click Add to create a new form

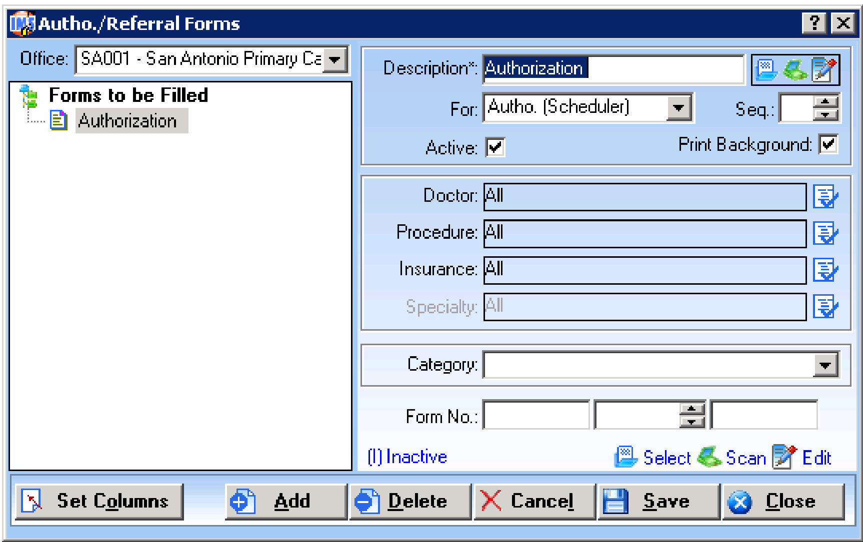
Description – Enter a description of this form.

 - this icon will allow you to select a file in IMS or on your computer.

NOTES:

- this icon will allow you to scan in a form to use from here.

- this icon will allow you to edit the file you have selected to use.



For – allows you to select if this form will be the default for the visit note, default for the scheduler or a referral form.

Seq – Select the sequence you want this form to appear.

Active – check for an active form, uncheck to make form inactive.

Print Background – if this is checked it will print the form along with the background.

Doctor – allows you to select if this form only applies to a specific doctor.

Procedure – allows you to select if this form only applies to a specific procedure.

Insurance – allows you to select if this form only applies to a specific Insurance plans (you can select multiple plans).

Specialty – for referrals only – allows you to select if this referral form is only for a specific specialty.

Category - select the form category to save this form in.

Set Columns – allows you to set columns of information from the office, patient, case, facility, visit note, attorney, etc to auto populate in your form upon printing.

Form Number – for internal reference – enter if you have a specific form number you want to reference.

Click Save to complete your form.

NOTES:

Setup Referral Status

Setup>>Other>>Referral Status Master

Select add to create Status rows are the various categories you want to use as you process a referral through the steps to get it approved. The gray status options are system defaults and cannot be changed or deleted.

Setup Default Referral Doctors

Click add to setup any default referral doctors that you want to appear when selecting a specific specialty or insurance plan.

Select by office, specialty, doctor, insurance plan or carrier and referral doctor name.

Authorization Tracking

You can open this two ways: Select Activities>> Authorization Tracking or click the icon .

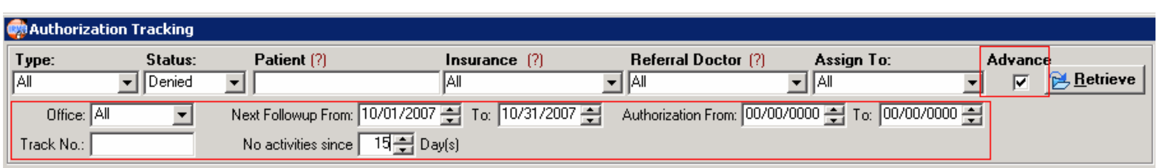
You can also access authorizations that are patient specific when entering new patients, visit notes, setting appointments and creating new cases.

Filtering

The top bar of the Authorization Tracking window allows user to filter by Type, Status, focus on one patient, focus on one Insurance, filter by Referral Doctor, filter by Assigned to.

Leaving the default of ALL click the Retrieve button. This will pull up all Authorizations needing to be worked on.

If you place a √ in Advance then a second row of filter options appears. From this area you can focus on the Next Followup, No acitivity for #days, etc. Input desired filters and click Retrieve.



NOTES:

____

____

____

____

____

In viewing pending or Requested Authorizations you can view/edit the following:

This icon can be selected to pull up the forms to filled out for the authorization.

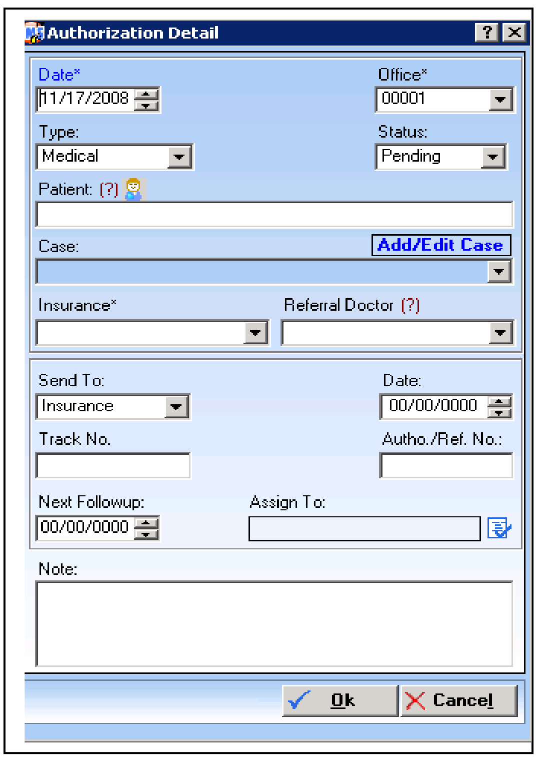
Status - You can change the status to as you move through the steps of getting your authorization.

Send to – can be changed to insurance or referring doctor.

From Column – tells you where the Authorization was created from – an appointment, walk-in, visit note, manual, etc. See the legend at the bottom of the screen.

Right click – will bring up your patient options, allow you to edit or delete the authorization, edit the appointment or case this applies to, and open a visit note or prescription.

Adding a New Authorization from the Authorization Screen:



Select your date, office and patient name. The status option will be pending until you request an authorization.

Case – Select from the list of current patient cases or add a new one.

Insurance – select insurance that you are request authorization from.

Referral doctor – enter name if one applies.

Send to – if you are sending this to the insurance or referral doctor.

Date – date send request

Track number – if any given or for mailing purposes.

Auth/ref no – if one provided by the insurance company.

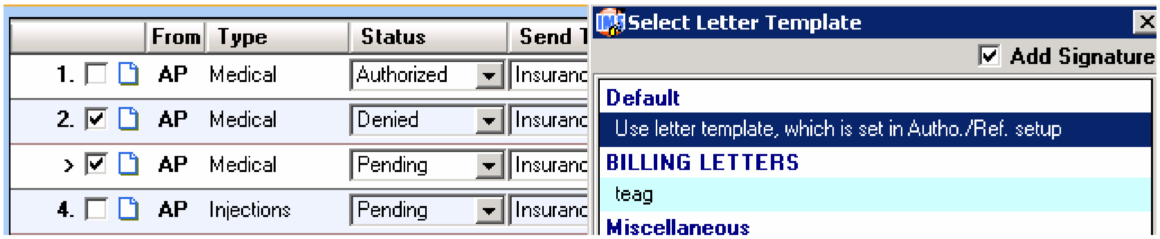
Next follow-up – date you want to follow-up on this authorization.

Assign to – who the follow-up reminder will be assigned to.

NOTES:

Faxing or Printing Authorization Request

To fax authorization request information, place check in box, click FAX button, choose the Letter Template and fax the document with or without signature to the appropriate entities.



You will do the same thing to print, only select the print button instead of the fax button.

Input Authorization Approval Information

Click the "Pending" in the status field and change to "Authorized". This will open the patient Case window that applies to this authorization. Click the Authorization button and type in the authorization information.

Enter all fields which are applicable –

Authorization#

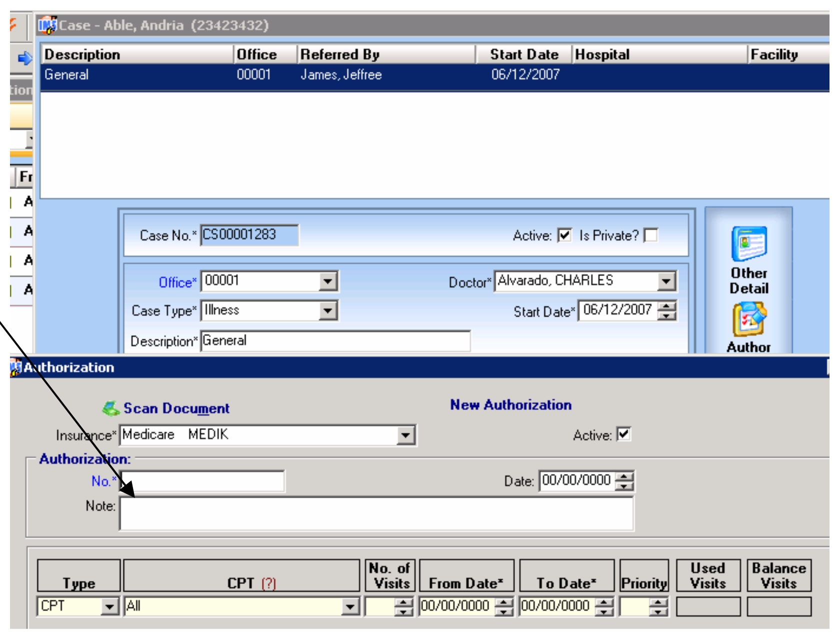
Choose CPT if applicable

Input # of visits if applicable

Date range if applicable

Priority

Then SAVE and close the window.

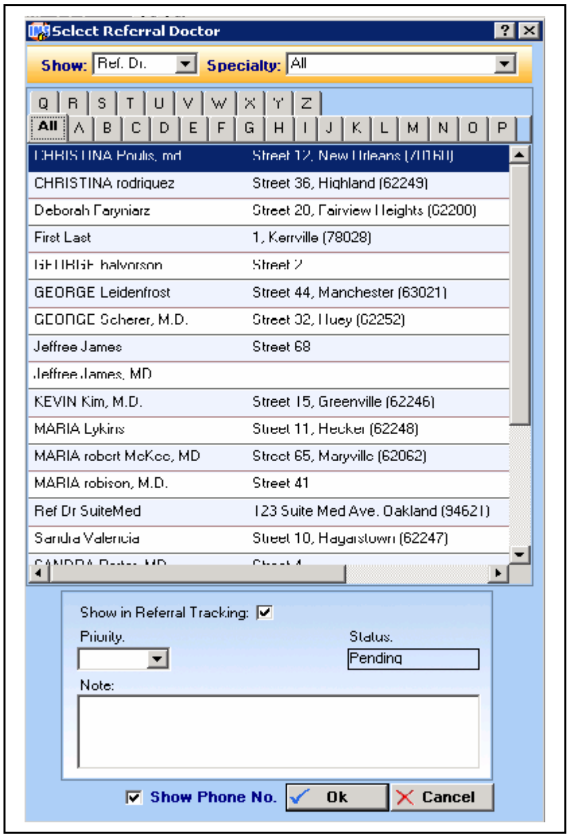


NOTES:

Entering a Referral Request for Tracking

This can be done two ways: From the Plan/Patient Instructions section of the visit note or from the referral tracking screen.

From the visit note – under Plan or Patient Instructions select Needs Referral, select the specialty



A window will appear allowing you to select the doctor by specialty or alphabetically.

Check the box yes or no to track in referral tracking.

Status will default to Pending.

Select your Priority.

Note – input any internal note for the referral

Show phone number – will include the referral physicians number in the visit note.

Select OK when done.

Referral Tracking Screen

Activities>> Referral Tracking

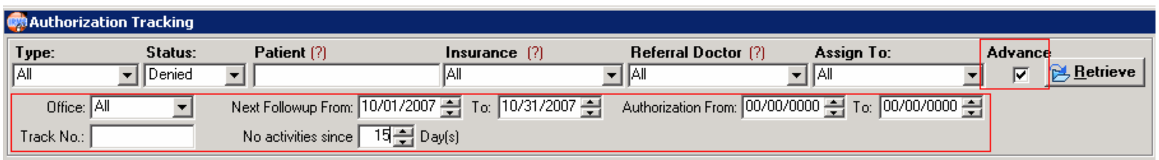
Filtering

The top bar of the Authorization Tracking window allows user to filter by Type, Status, focus on one patient, focus on one Insurance, filter by Referral Doctor, filter by Assigned to.

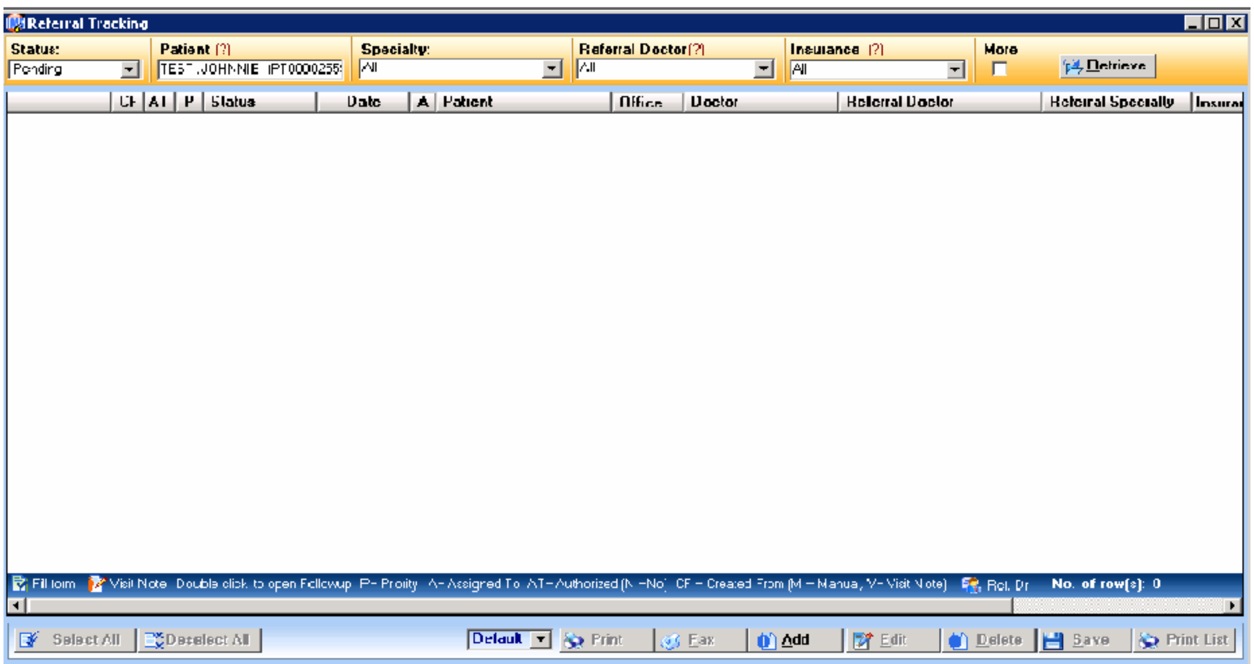
NOTES:

Leaving the default of ALL click the Retrieve button. This will pull up all Authorizations needing to be worked on.

If you place a √ in Advance then a second row of filter options appears. From this area you can focus on the Next Followup, No acitivity for # days, etc. Input desired filters and click Retrieve.



The columns below the filter options are as follows:



 - The note icon will allow you view or add an internal note

 - This icon can be selected to pull up the forms to filled out for the referral.

NOTES:

____

____

____

____

____

CF – Created from M – Manual from the screen or V – Visit Note

Status - You can change the status to as you move through the steps of getting your authorization.

Date – the date the referral was created.

A Column – Y indicates it is assigned to a person in the office

Patient - Patient name the referral was generated for

Office - Office referral generated from

Doctor – Doctor the patient sees in your office

Referral Doctor & Specialty – Doctor and the Doctors Specialty that the patient is being referred to

 - this icon will give you the suggested referral doctor if previously setup in the system by specialty and the patients insurance.

Next Followup – next time the user needs to followup on this dictated upon referral entry.

Right Click Options:

If you right click on a Referral line you have the option to view all your patient details, edit this referral, delete this referral or create a follow-up.

Status Changes:

Apt Booked – will bring up a window that allows you to enter the date and time of the appointment booked a the referring specialists office for this patient.

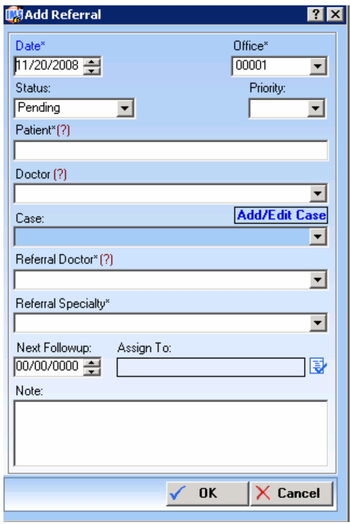
Doc Received – will open a window asking if you would like to add a document. If you have an approval document that you want to scan or add in you can do that here and attach it to the patients chart.

Adding a Referral from Authorization Window

Click the Add button at the bottom of the screen

NOTES:

SuiteMed
Beyond EMR



Date – date referral created – defaults to today's date.

Office – select office referral is for

Status – Pending is the default, but you can select the status

Priority – priority of this referral request

Patient – patient referral is being created for

Doctor – treating Doctor in your office.

Case – select, add or edit a patient case for this referral.

Referral Doctor & Specialty – select Doctor & Specialty you are referring to.
Next Follow-up – you can enter a follow-up date to indicate the next time you need to follow up on your referral status.

Assign To – assign a person in the office to handle this referral request.

Note – Internal office note can be entered here.

Faxing or Printing Referral Request

To fax authorization request information, place check in box, click FAX button, choose the Letter Template and fax the document with or without signature to the appropriate entities.

You will do the same thing to print, only select the print button instead of the fax button.

Parameters

Setup>>Parameters>>System>>Other

Default Authorization Type – can select the default type that pulls up when an authorization is created.

Default letter for referral tracking (Visit Note) – Set the default letter for referrals created in the visit note.

NOTES: