## Objectives & Goals – Office Setup

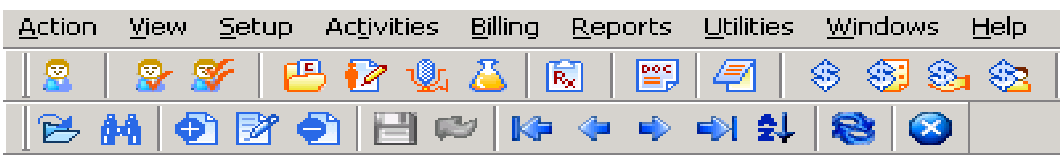
- To Create a new Office Group
- To Create a new Office
- To Add a new Specialty
- To Add a new Employee Designation
- To Create a new Provider Group
- To Add a new Employee/Doctor Information

## Hot Keys

Ctrl + N - Add a New record
Ctrl + E - Edit a record
Ctrl + L - Cancel a record

Ctrl + Del - Delete a record
Ctrl + S - Save a record

TAB – toggle between data entry fields
Shift + TAB – toggle backwards between data entry fields




The **Main Menu** contains:
Setup menu where most of the system setup is located
Activities menu where users can access Visit Note, Scheduler, Tasks, etc
Billing menu is where users can access the Billing functions
Reports menu is where users can access the Reports

The **Main Toolbar** contains icons that launch various activities including Charge Posting, Claims, Collection Module, Authorizations, Scheduler, Check In/Out, etc.

The **Activity Toolbar** is different depending upon which activity the user is running. However, many of the icons are similar:

**NOTES:**

Retrieves all records (for example, will retrieve all employee records or all visit notes). Users can then use the arrow keys to move between records.

Opens a search window for users to locate a particular record (for example, find a particular patient).

Adds a new blank record Use this icon to create a new patient, employee, etc.

Allows users to edit an existing record

Used to delete a record

Saves the data entered into a record.

First Page

Previous Page

Last Page

Next Page

Arrows are used to move between all records with multiple are loaded.

Sorts

Refreshes the activity

Click on this icon if you want to close a specific screen.

This is the icon for Search – so if you will click on this it will show the specific information that you are looking for.

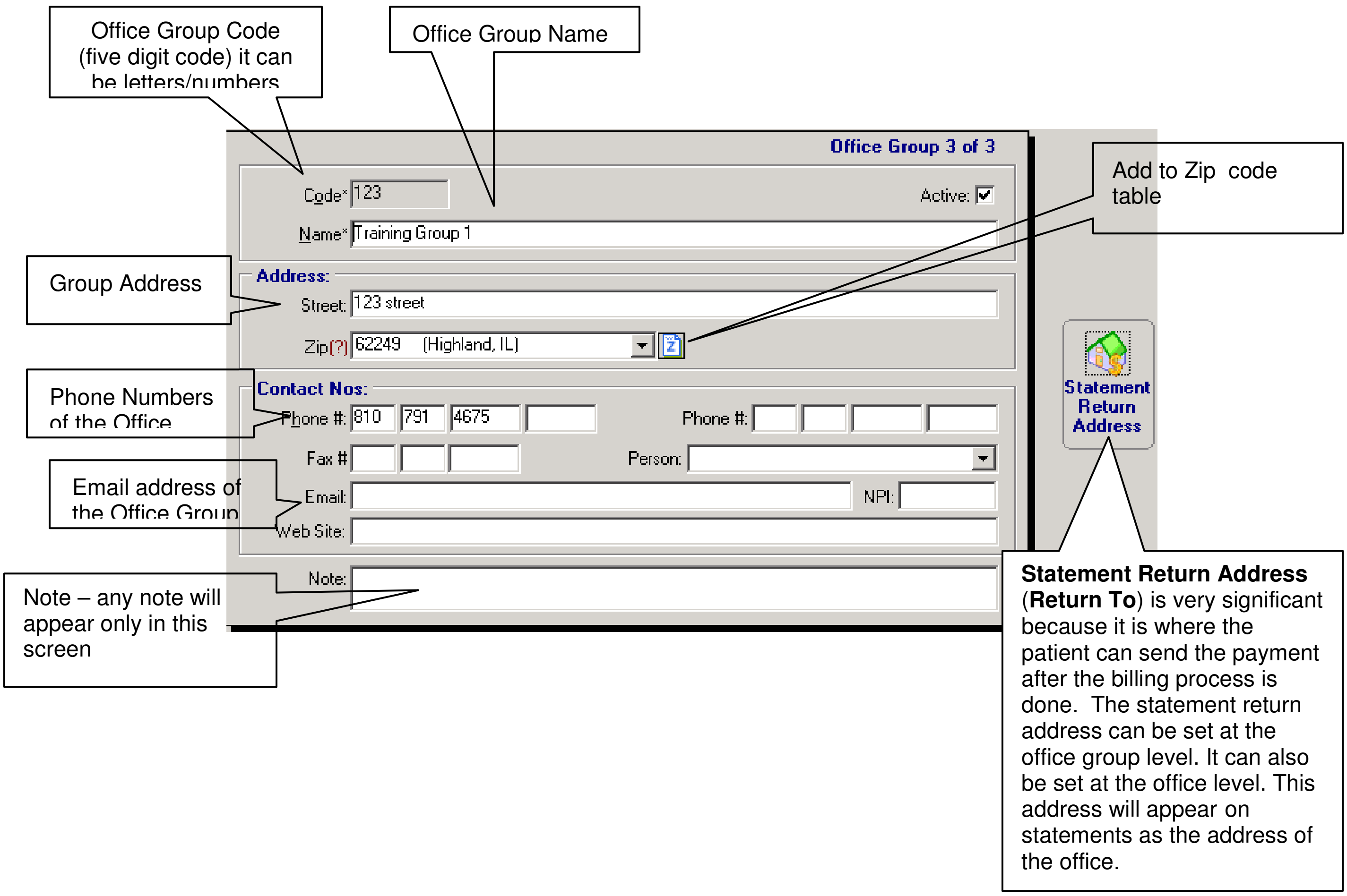
**NOTES:**

## Setup An Office Group

Setup>>Office>>Office Group

Office Groups are for organizations that have many office locations, but one central office or headquarters. This central office is the Office Group. Office groups are created for various purposes like consolidation and internal use, to give a common name to all the offices which are forming a group. The office group is not a physical entity.

After Selecting **Office Group** from the **Setup** > **Office** > **Office Group** the screen below will appear

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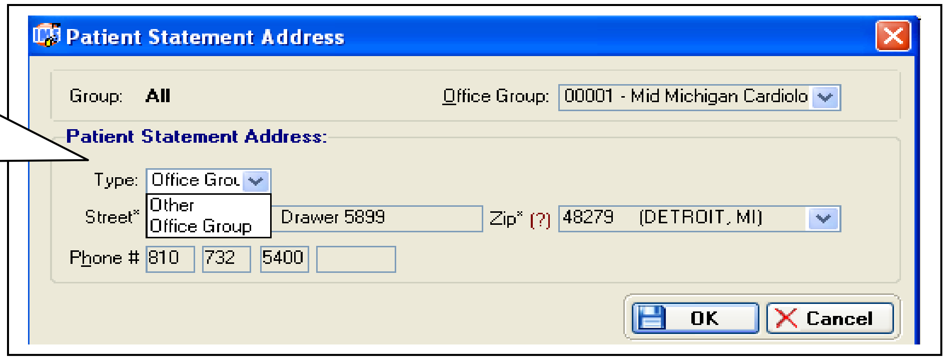
When clicking on the **Statement Return** icon

This screen below will appear after clicking the icon of
**Statement Return Address** from **Set-up – Office – Office Group**


Type - In this field we can define the type of the Patient Statement Address. The value can either be **Office Group** or **Other**.




If we select Office Group then system will automatically fetch the values of Street, Zip and Phone from the Office Group Master. And if we select Other than we have to enter the details like Street*, Zip*, Phone.
Note: All the fields with the * are mandatory fields and require completion to SAVE.

**NOTES:**

## Setup Office

Setup>>Office>>Office

An Office means the Doctor's Office. It is a physical place where the providers can examine the patients. One or more than one providers can have a single office and one provider can have more than one offices.

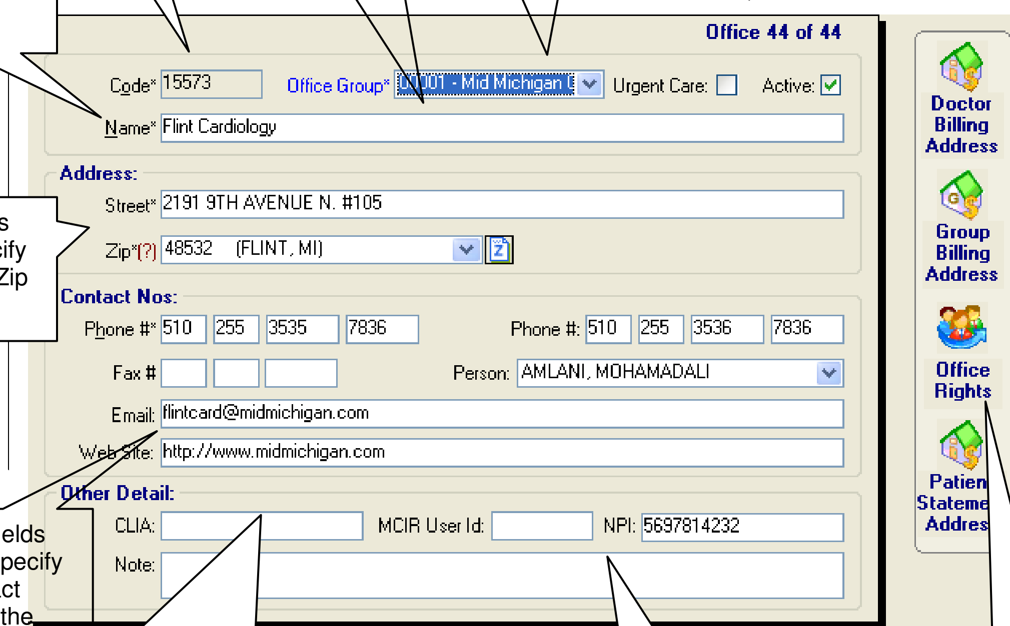
You can create a specific code for each Office that you are going going create.

In this field you can select what **Office Group** you are going to use for the **Office** that you will create

Urgent Care – is designed for emergency purposes. Because some Office is acting like urgent care

In this corner you can identify the total number of offices created in the system

In this field you can specify the name of the Office




In these fields you can specify the Street & Zip of the Office

In these fields you can specify the Contact details of the Office

**CLIA** (**Clinical Laboratory Improvement Act**) this act help's develop comprehensive, quality standards for all laboratory testing to ensure the accuracy, reliability and timeliness of patient test results regardless of where the test was performed.

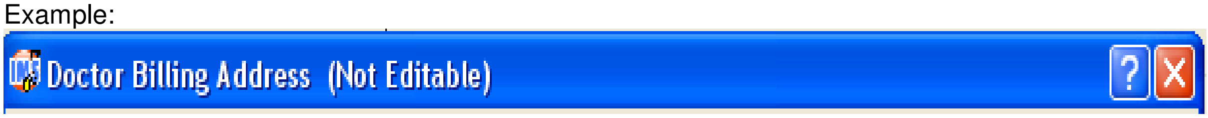
**Note** – if you have additional information you can type it here. And it will appear only in this screen

**Icons to the right described on next page**

**NOTES:**

## Doctor Billing Address

**Note:** After clicking the icon, if you can see this message **(Not Editable)** at the upper portion of that screen that means you are not in Edit mode when you click that icon.
Example:

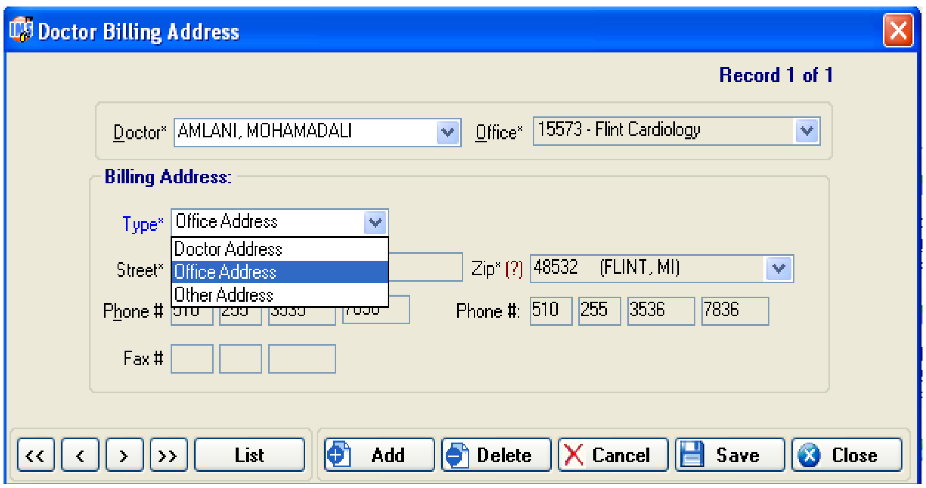



Select the doctor for whom you want to set the Billing Address.

Select the office for which you want to set the Doctor Billing Address

In this corner you can identify the total number of record of Doctors Billing Address


**Type:** In this we can specify one of the three Addresses
**Doctor Address:** The system will automatically fetch the address of the Doctor from Employee/Doctor Master.
**Office Address:** The system will fetch the address from Office Master.
**Other Address:** We have to enter all the details manually.




In this Doctor Billing Address Screen we have to views **List View** and **Detail View.** So if you will click on List it automatically show the details of Doctor Billing Address

**NOTES:**

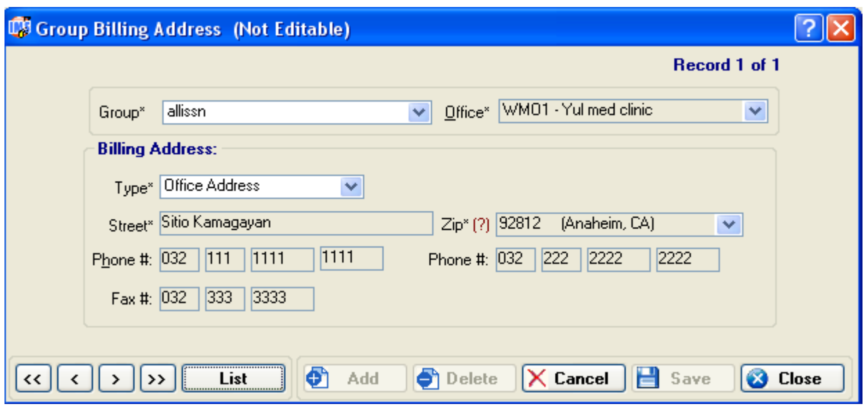

## Group Billing Address

Select the Group for whom you want to set the Billing Address

Select the office for which you want to set the Group Billing Address.

In this corner you can identify the total number of record of Doctors Billing Address

**Type:** In this we can specify one of the three Addresses.
**Group Address:** The system will automatically fetch the address of the Group from Provider Group Master.
**Office Address:** The system will fetch the address from Office Master.
**Other Address:** We have to enter all the details manually.




We can also Add, Delete and Navigate the addresses.
Make sure to save the information before clicking close.

Click on List it automatically shows the details of Group Billing Address
In this Group Billing Address Screen we have to views List View and Detail View.

**NOTES:**

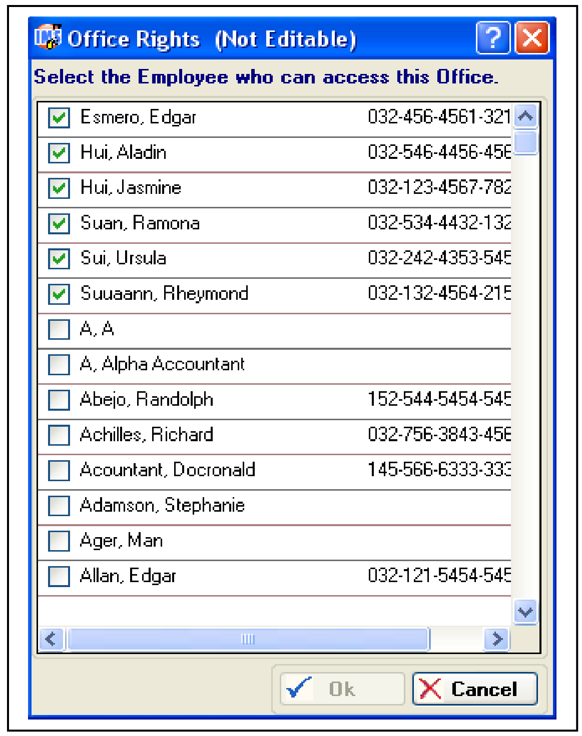
This screen is used to assign the office rights to the employees. Here we can select the Employees who can visit this office.

The Employees List will come from Employee/Doctor Master. Set-up > Office > Office Master

## Office Rights


This screen is used to assign the office rights to the employees. Here we can select the Employees who can visit this office. The Employees List will come from Employee/Doctor Master.

Set-up > Office > Office Master

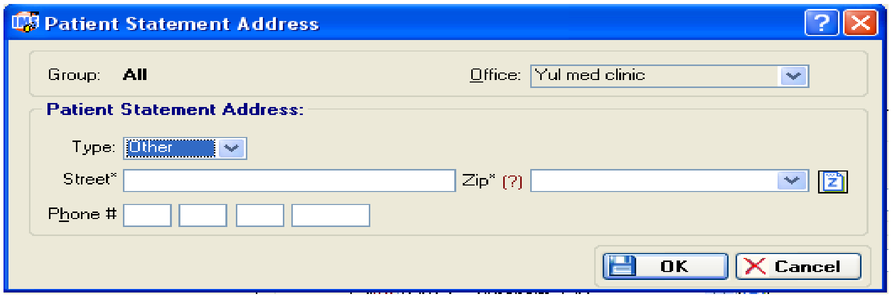




**Statement Return Address**

We can also provide the **Patient Statement Address** while creating the office. This address will be used as '**Return To'** address for the patient statements for this office. The information fields for the patient statements address screen are

**NOTES:**



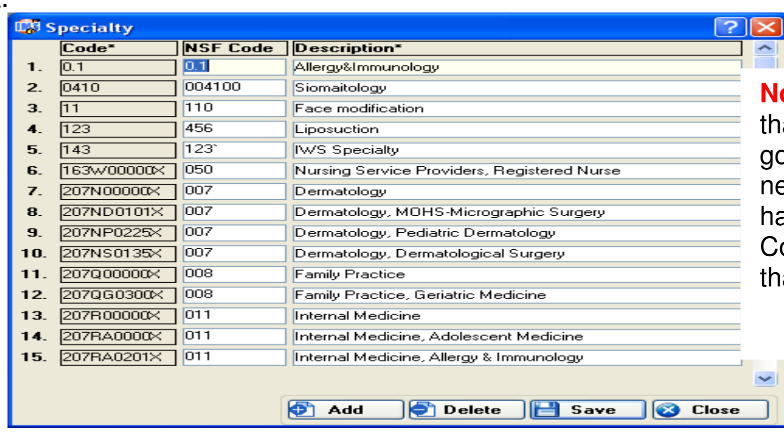

**Type**: In this field we can define the type of the Patient Statement Address.
**Office**: The system will fetch the address of the Office from **Office Master**.
**Other:** We will have to enter the address manually.

**Note:** If you are sending a Billing Statement to the patient and you want the address of your desire to automatically fetch in the system. You can go to **Set-up** > **Parameter** > **System** > **Report Print** > **Report Header Info. From** > then you are given an option to choose **Office** or **Office Group** > after selecting click on **Save** button.

## Setup Specialty

**Set-up** > **Office** > **Specialty**

A **specialty** in medicine is a branch of medical science, other than general practice. After completing medical school, physicians or surgeons usually further their medical education in a specific specialty of medicine by completing a multiple year residency. Doctors who engage in a medical specialty are known as medical specialist.




| | Code* | NSF Code | Description* |
|---|---|---|---|
| 1. | 0.1 | 0.1 | Allergy&Immunology |
| 2. | 0410 | 004100 | Siomaitology |
| 3. | 11 | 110 | Face modification |
| 4. | 123 | 456 | Liposuction |
| 5. | 143 | 123` | IWS Specialty |
| 6. | 163W00000X | 050 | Nursing Service Providers, Registered Nurse |
| 7. | 207N00000X | 007 | Dermatology |
| 8. | 207ND0101X | 007 | Dermatology, MOHS-Micrographic Surgery |
| 9. | 207NP0225X | 007 | Dermatology, Pediatric Dermatology |
| 10. | 207NS0135X | 007 | Dermatology, Dermatological Surgery |
| 11. | 207Q00000X | 008 | Family Practice |
| 12. | 207QG0300X | 008 | Family Practice, Geriatric Medicine |
| 13. | 207R00000X | 011 | Internal Medicine |
| 14. | 207RA0000X | 011 | Internal Medicine, Adolescent Medicine |
| 15. | 207RA0201X | 011 | Internal Medicine, Allergy & Immunology |

**Note:** Make sure that if you are going to Add a new Specialty it is has a Taxonomy Code to ensure that it is valid.

This is the site of the Taxonomy Code: http://www.healthlink.com/tech_tip_taxonomy_code.asp
The National Standard Format (NSF) Code appears in field 24D on CMS 1500 form.

**NOTES:**

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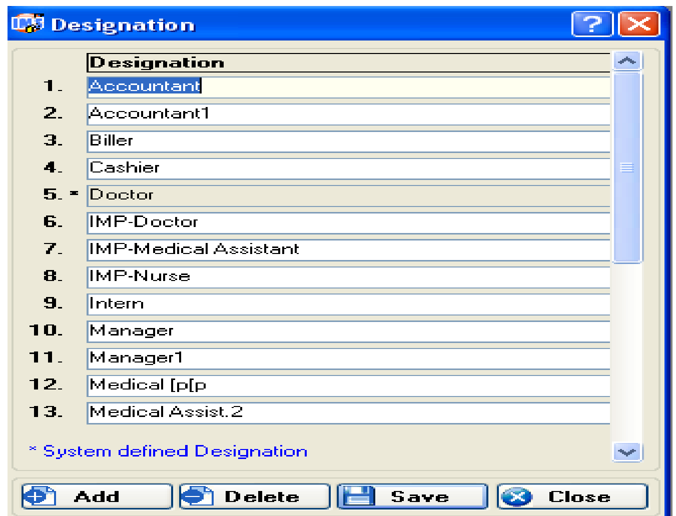
**Setup Designation**
**Set-up** > **Office** > **Designation**

This is the Designation of every individual in the office. And it will reflect in Employee/Doctor Master. Only **Doctor** is hard coded under Designation. The designation Doctor is not editable or cannot be deleted. Other designations are user defined.

**Note:** You can Add and Delete field (but you can only delete those that you have created). For those Designation that already exist in the system are not editable or cannot be deleted.




**NOTES:**

**Setup Provider Group Master**
**Set-up > Office > Provider Group**

Provider groups only need to be created if a group of providers bill as a group. If each provider bills individually, provider groups are not necessary.

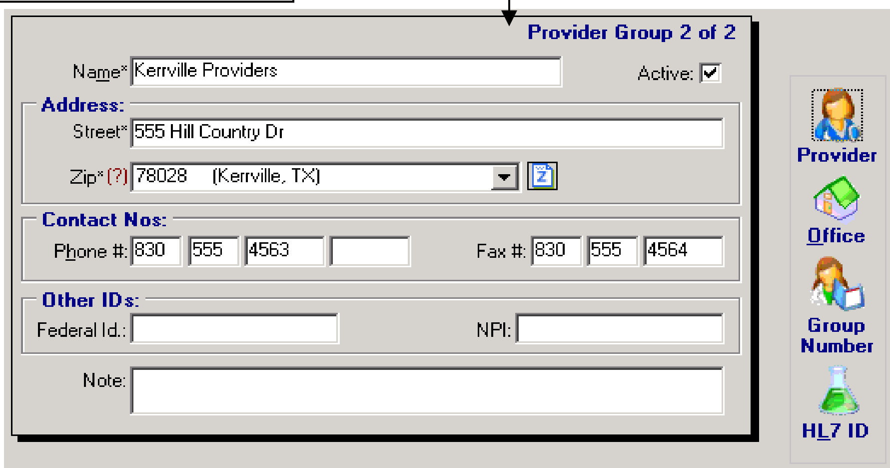
In this corner you can identify the total number of Provider Group created in the system

In this field you can enter the Name of the Provider group

In these fields you can enter the information for the Provider Group Address

In this field you can enter your Contact Nos.

A number assigned to a business for tax reporting purposes.

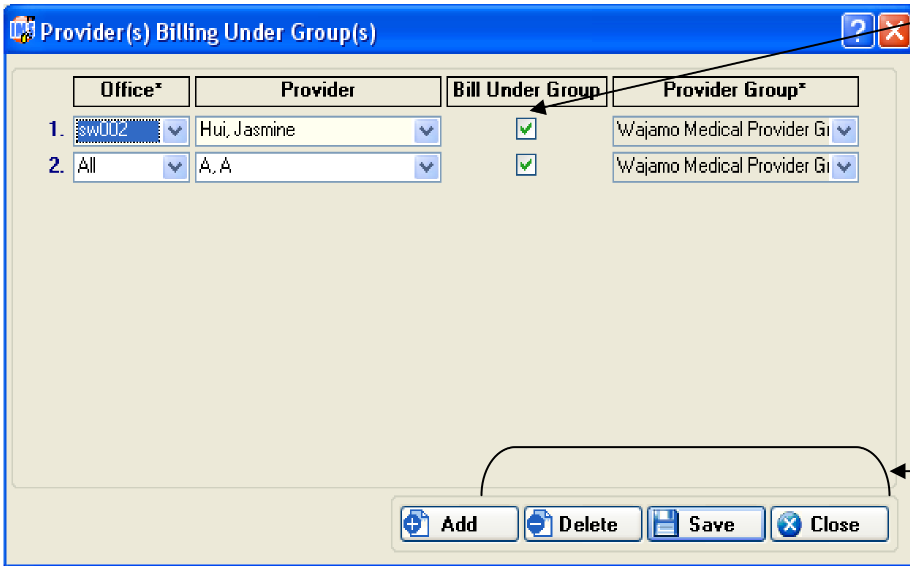



If you will click on **Provider** the screen below will appear.

In these fields you can specify the name of the **Office & Provider**. Select Provider(s) under the Provider drop down list to set Billing Under Selected Provider Group.

**NOTES:**

SuiteMed
Beyond EMR




Just put a check mark inside the box if you want to bill the Provider under group

You can also Add or Delete the fields. Then make sure to save whatever changes you made.

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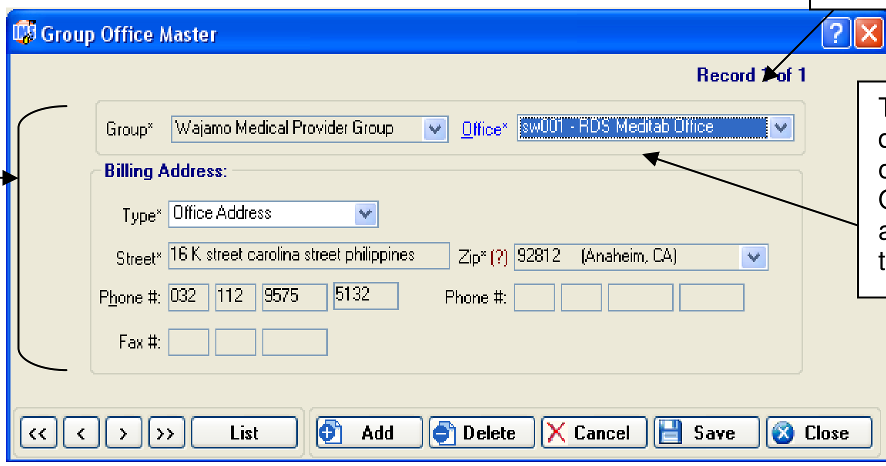
**Group Office** screen appears below.

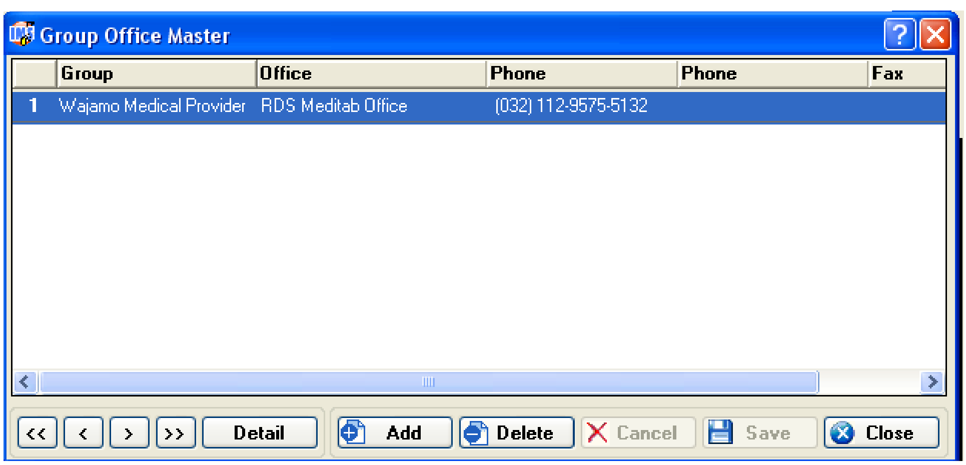
Total number of records.

A billing address can be defined here if the organization bills under the group. This is the address that appears in Box 33 on a CMS 1500 form.




This is the drop down list of all the Office available in the system.

**In this Group Office Master Screen we have to views List View and Detail View.**

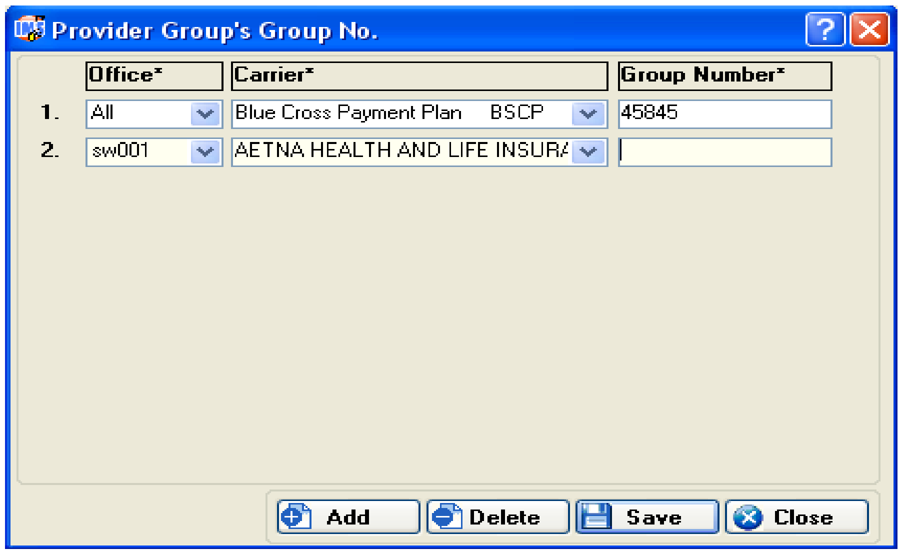



**If you will click on List it will automatically fetch the details of Group office Master**

**NOTES:**


## Provider Group Number

Click Group Number to define insurance carrier group numbers for the provider group. This can also be defined at the provider level. Enter Provider Group Number issued by different Insurance Carriers for the selected Office or all Offices. If you select **"All"** under office, then Provider Group Number issued by a specific Insurance Carrier is valid for all offices.





## HL7ID

Click HL7 ID button to associate an HL7 ID with a lab. This can also be defined at the provider level.

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# Employee/Doctor Master

**Set-up > Office > Employee/Doctor**

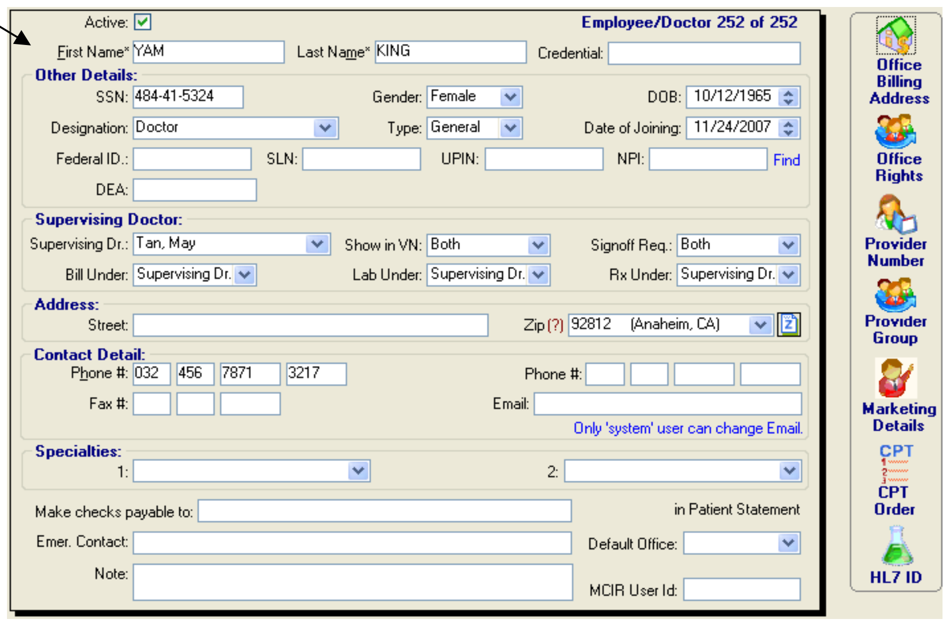
Enter the Employee / Doctor's personal information, professional information, address, contract numbers, specialties, default office, payable details, etc.

In these fields you can enter the name of the Employee or Doctor

Just put a check mark on the box if you want this Employee or Doctor active in the system

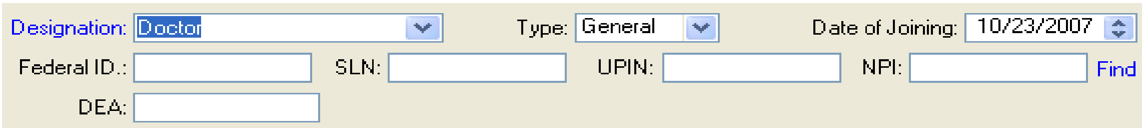
In this corner you can identify the total number of Employee/Doctor created in the system

In these fields you can enter the Address and Contact Details of the Employee or Doctor.
Email – this is important, if you forgot your password when logging in your password can be emailed to you.
Once your email is saved in your profile you will not be able to change it.



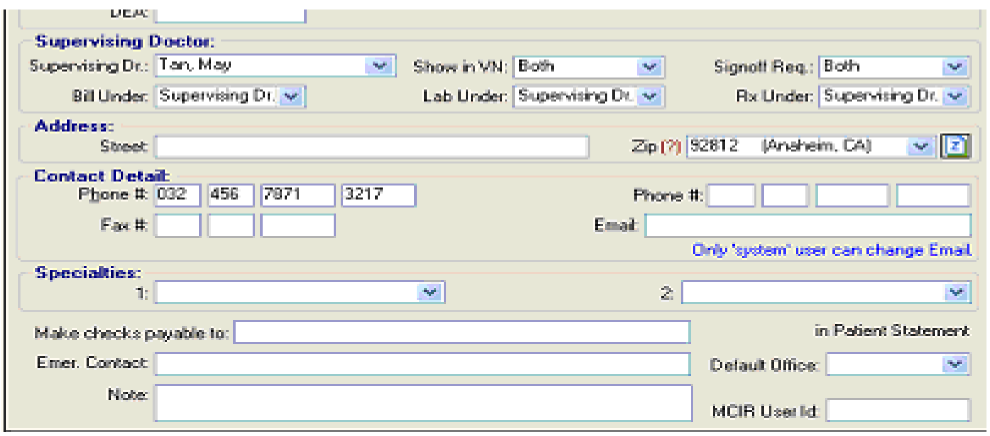

**Designation** – this list comes from **Set-up >Office > Designation.** If you will select Doctor **Federal ID**, **SLN**, **UPIN**, **NPI, DEA** and **Specialties** is enabled.

**NOTES:**

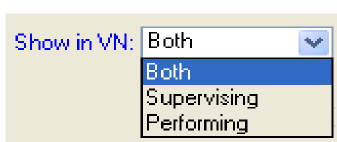



**Federal ID:** Federal Tax ID / Social, which ever is appropriate.
**SLN** – State License Number this will reflect in HCFA Path: **Set-up > Billing > HCFA #25**
**UPIN** – Unique Physician Identification Number is used by Medicare to identify doctors across the United States. UPIN's are six-place alpha numeric identifiers assigned to all physicians. Path: **NPI** – National Provider Identifier is a unique 10-digit identification number issued to health care providers in the United States by the Centers for Medicare and Medicaid Services.
**DEA** – Drug Enforcement Act this will reflect in Prescription
**Find** – if you will click on this, it will lead you to NPI website of the Doctor that you have selected

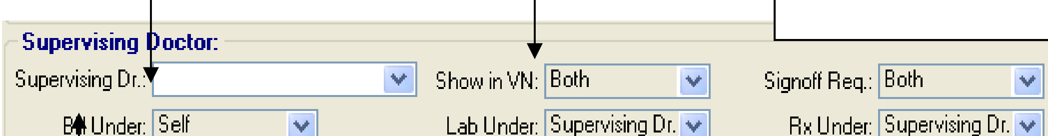
**In the center of this screen you must link the appropriate information:**




In this field you can select a Supervising Doctor from the drop down list.




After selecting a supervising doctor you will be given an option if you want **Both** or **Performing** or **Supervising** doctor will appear in Visit Note.

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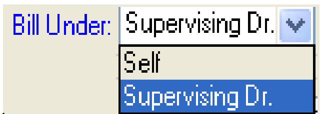
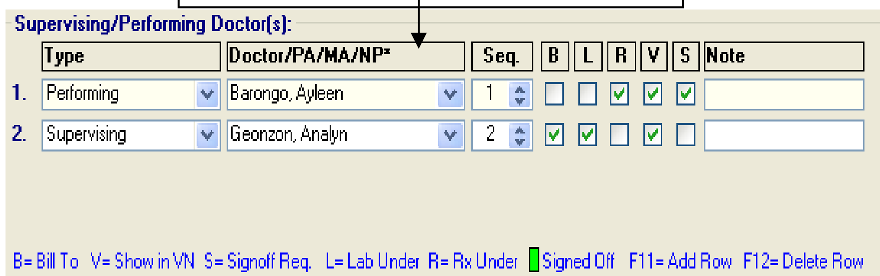


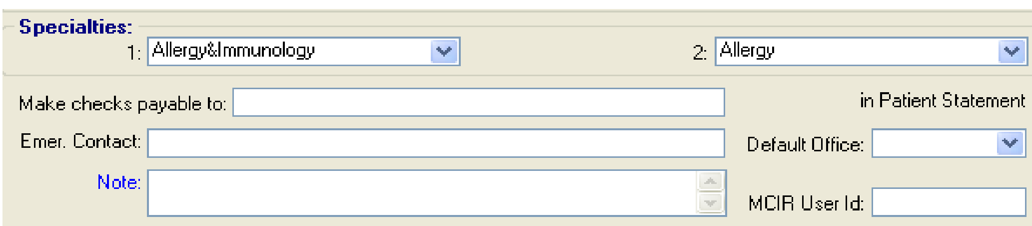

In this field you can choose to Bill it under Self or Supervising Dr.

All of these options will reflect in Visit Note. Path: You can Click on the **Icon of Visit Note** or **Activities** > **Visit Note** > then double click on **General**. The screen below will appear.




**Specialty:**

In this field you can select the specialty from the drop down list. This list comes from: **Set-up** > **Office** > **Specialty**




**Make checks payable to: -** will reflect in your statement.
**Path: Billing > Statement > Statement 1, 2, 3**

**Default Office** – we can set this in: **Set-up** > **Parameter** > **User** > **Other** > **Default Office From** > **two options (Employee or Computer)**
1. If this parameter is set to "**Employee**" then, system will take default office from **Employee**/**Doctor** Master.
2. If this parameter is set to "**Computer**" then, system will take default office from **Computer** Master.

**MCIR (Michigan Childhood Immunization Registry)** - is a collaborative project through the Michigan Department of Community Health. MCIR ensures consistent accessibility to a person's immunization

**NOTES:**

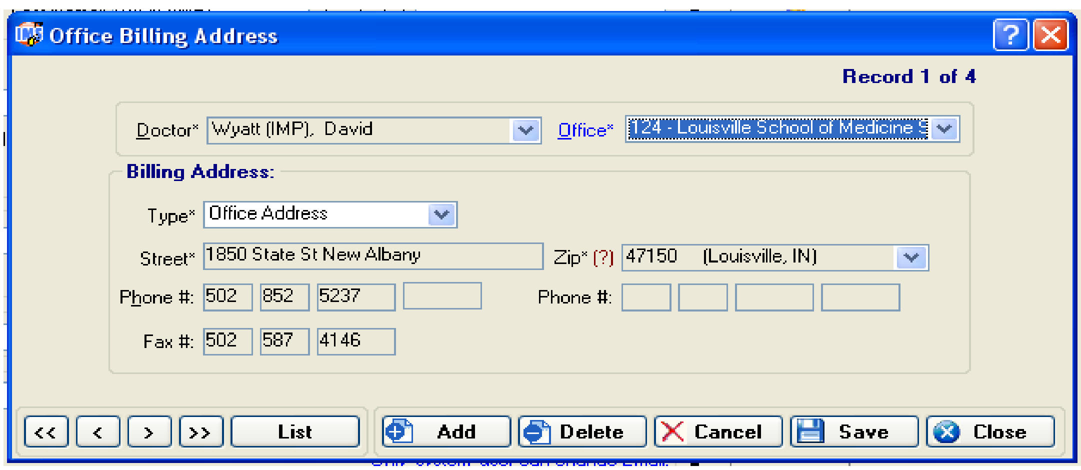
record regardless of the person's location in Michigan. This system also helps to track local and state immunization rates of Michigan residents to ensure immunity to vaccine-preventable illnesses.

**Office Billing Address**


Click Office Billing Address to associate the provider with an office and set the provider's billing address. This is the address that appears in **Box 33** on a **CMS1500** form. The provider will not appear in the schedule until a billing address is defined.

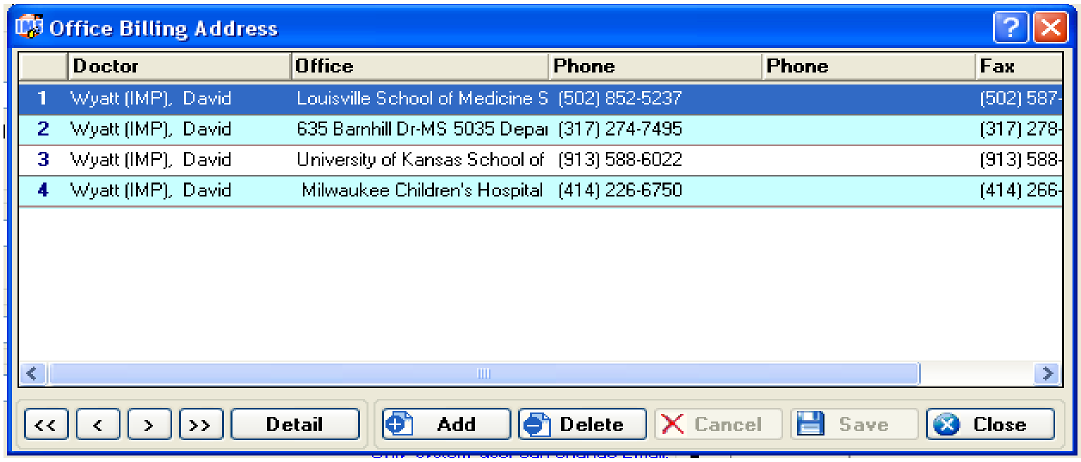
If a doctor works in multiple offices, on the main doctor master screen, there is a field to identify the doctor's default office. First complete the billing address for each office, and then identify which is the default.

Under **Type**: and if you will select Office Address it will automatically fetch the information.




In the Office Billing Address we have the views List View and Detail View.
This screen appears only if you had selected doctor as Designation.

**NOTES:**

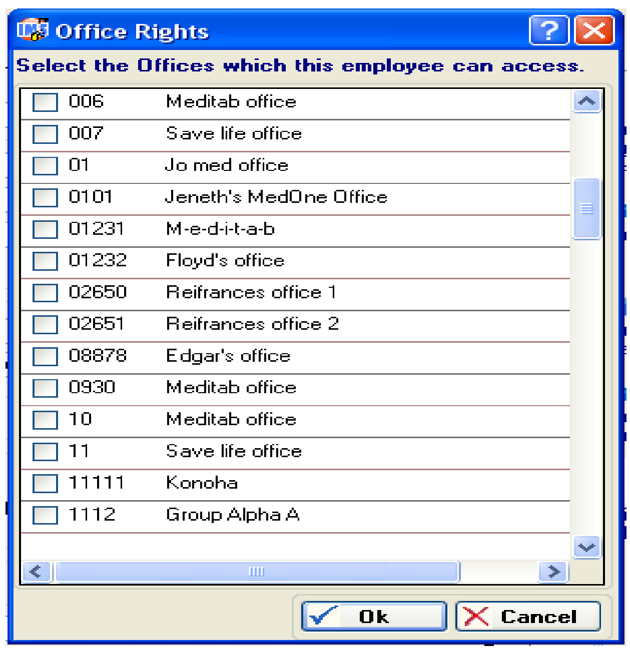



Clicking List it will automatically show in list form the number of Offices, with doctor / office / phone, etc. Click Details and the window above appears.

Again, there are 2 views, List or Detail.

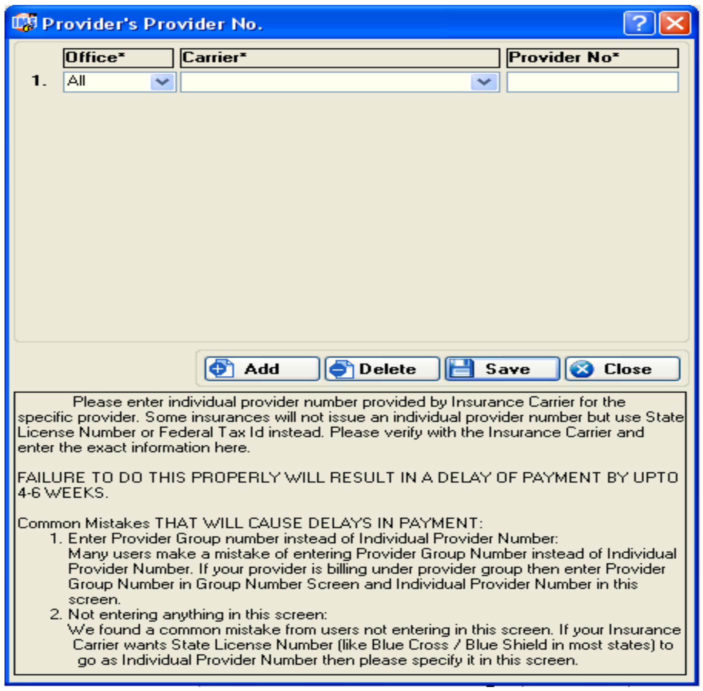
**Office Rights**

Click on Office Rights to define which offices this employee / doctor has access. If it is a new employee or doctor just put a check mark on the box to give them an access to a specific office.




**NOTES:**

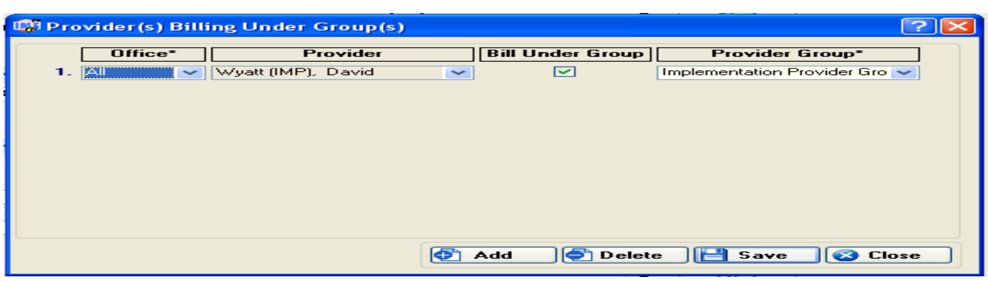
**Provider Number:** It is necessary to enter any specific Provider number linked to each insurance carrier. This can be done from Payer > Carrier, or this screen. However, each insurance and each provider must have a value in the Provider No field.



**Provider Group Number**

If this is a Group Practice, it is necessary to link the Office, Provider, check to Bill under group and link Provider Group.

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