EZClaim

Appointment Scheduler

User Guide

Last Update: 11/19/2008

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Contents

Getting Started

Once the program is installed and you are able to open the program, review "Your First Appointment" on page 7 and work from there.

System Requirements

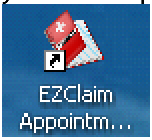
- Compatible with Windows Vista, XP with Service Pack 2, and 2003.
- Minimum screen resolution is 1024x768.
- Recommended minimum Pentium 4 or higher
- Recommended minimum RAM is 512MB

Installing the Program

Insert the CD and follow the on screen prompts. The normal program location is C:\Program Files\EZClaim and the database location is normally C:\Program Files\EZClaim for XP or 2003 and C:\Users\Public\Documents\EZClaim if using Vista.

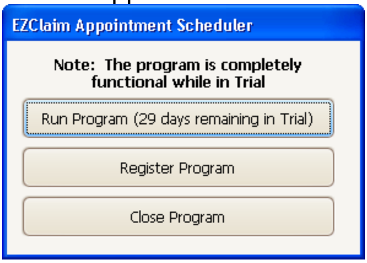
Opening the Program

Double click the EZClaim Appointment Scheduler icon on your desktop to start the program.



Registration

When you open the program in **trial mode**, a registration box will appear.



Click the 'Run Program…' button to continue using the trial.

If you have **purchased** the program and have your registration numbers, click the 

button to enter your registration number and Key Code.

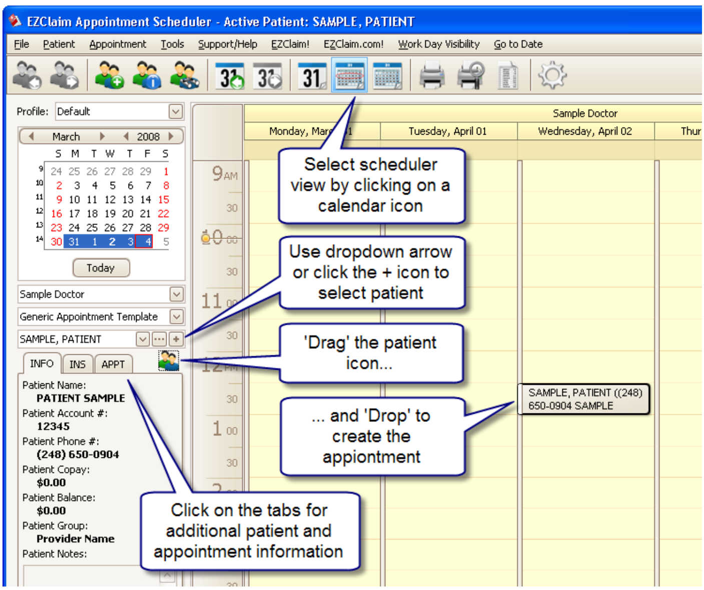
Registration Number – Enter the Registration Number provided by EZClaim at time of purchase.

Key Code – Enter the Key Code provided by EZClaim at time of purchase.

Your First Appointment

The **Main Screen** of **EZClaim's Appointment Scheduler** has an easy to learn and use interface.

The user can easily and quickly 'drag and drop' appointments to any date and time.



Once the appointment is created, you can double click or right click the appointment to modify the appointment properties.

What's Next?

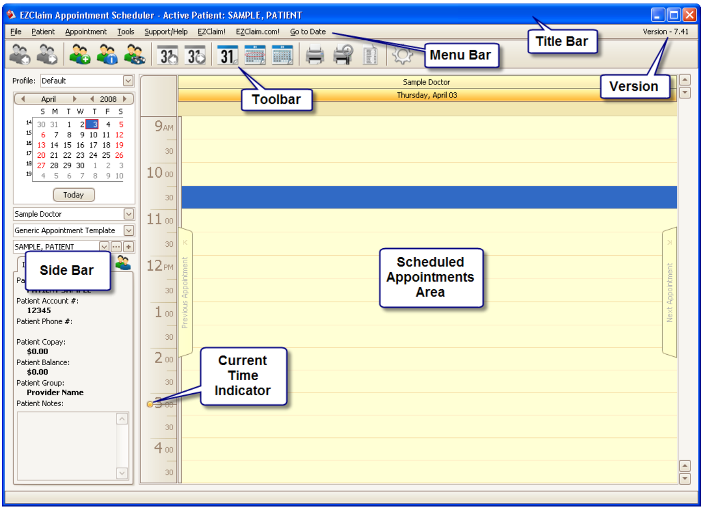
We suggest reviewing the following topics in order to help you setup the program and understand the features.

- ☐ "Scheduler Screen Overview" on page 9 – Become familiar with the icons and screen area names
- ☐ "Program Setup" on page 13 – Add doctors (resources), set your colors and other program options
- ☐ "Patients" on page 22 – Add, Edit, and Find patient information
- ☐ "Appointments" on page 26 – Add, Edit, and Find appointments. Includes setting the appointment attendance status.

Advanced Program Features

Integration with EZClaim Medical Billing Software

Scheduler Screen Overview

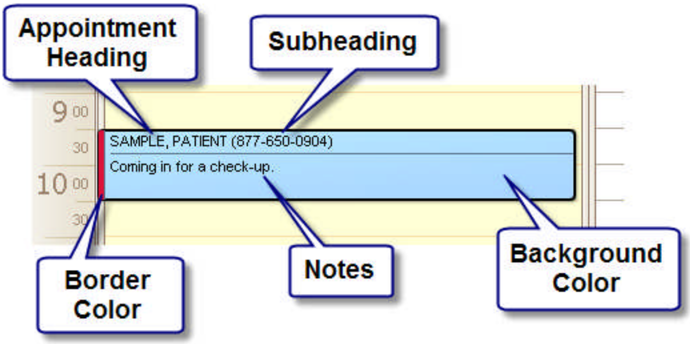


- Title Bar
- Version
- Toolbar
- Menu Bar
- Side Bar
- Current Time Indicator

Appointment Items

Each appointment is made up of the following items:

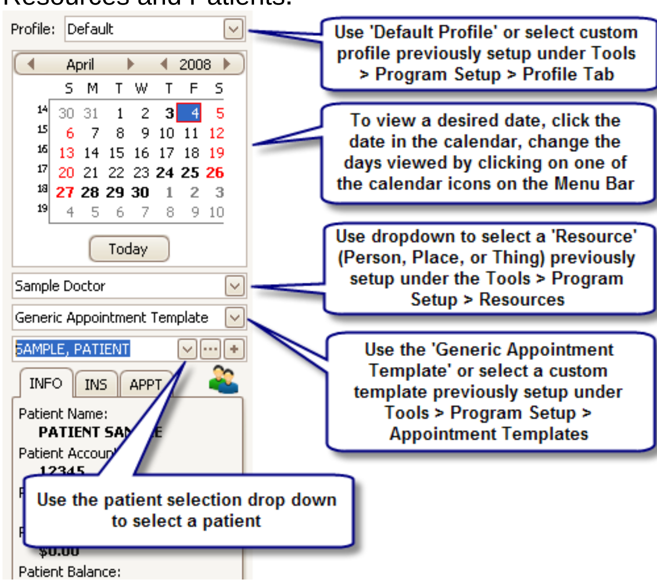
- Heading
- Subheading
- Notes
- Background color
- Border color



Side Tool Bar

The Side Bar contains items you will use when creating appointments and navigating the scheduler.

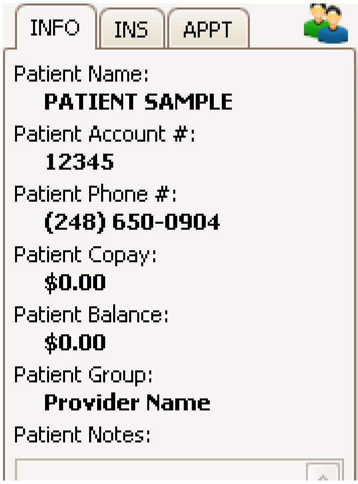
Below the Menu System is the Side Bar. Use this tool bar to quickly set up your scheduling options. The side tool bar allows for managing Profiles, Calendar View, Dates, Resources and Patients.



Patient Information Section

This section has three tabs to provide quick Patient, Insurance and Appointment information related to the selected patient. Click on tabs to display information.

Double click the patient name to open the full patient information screen.



Tool Bar

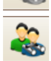
The EZClaim Scheduler program uses ‘quick’ tools for selecting the following options. Click on the tool bar icon to open the feature.

 **Previous Patient** – Move backward in the list of patients you have been working on.

 **Next Patient** – Move forward in the list of patients you have been working on.

 **New Patient** – Create a new patient.

 **Edit Patient** – Edit current patient’s data.

 **Find Patient** – Search for an existing patient.

 **Previous View –** Moves backward in the list of previous dates/views.

 **Next View** – Move forward in the list of dates/views.

 **Day View** – Sets calendar view to ‘Day View’.

 **Work Week View** – Sets calendar view to ‘Work Week View’.

 **Month View** – Sets calendar view to ‘Month View’.

 **Print Schedule** – Quick print of schedule.

 **Print Preview** – Preview schedule before printing

 **Reports** – Brings up the ‘Report’ dialog box.

 **Program Setup** – Brings up the ‘Program Setup’ dialog box.

Program Setup

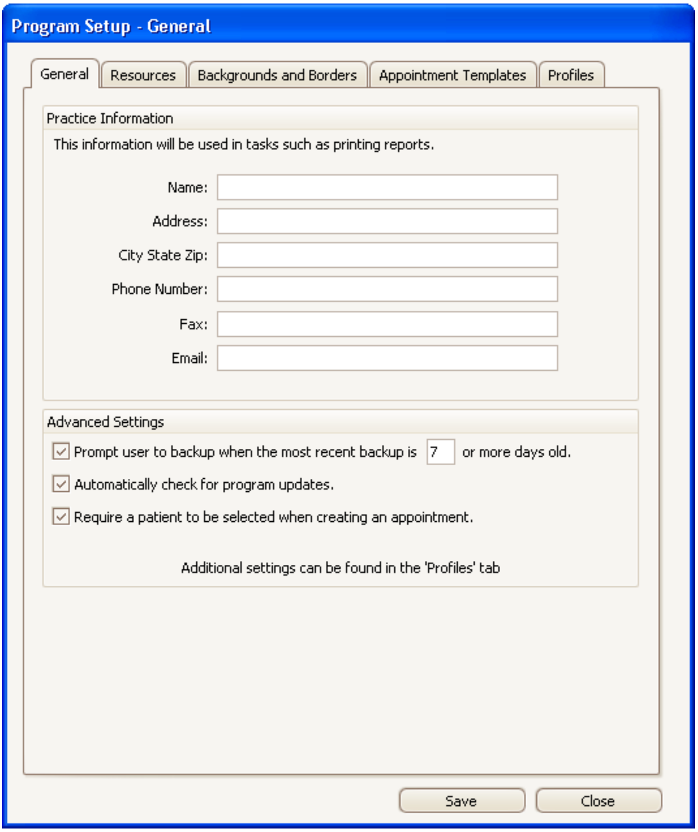
After installing **EZClaim Appointment Scheduler,** go to

Tools >Program Setup or click on the  icon to open the 'Program Setup' dialog box. Program Setup includes the following tabs.

- General Tab – Company information and general options
- Resources Tab – Doctors, rooms, and/or equipment that can be scheduled
- Backgrounds and Borders Tab – Appointment colors
- Appointment Templates Tab – Used to quickly setup different types of appointments
- Profiles Tab – Stores program settings such as screen color, resource, and calendar views.

General Tab

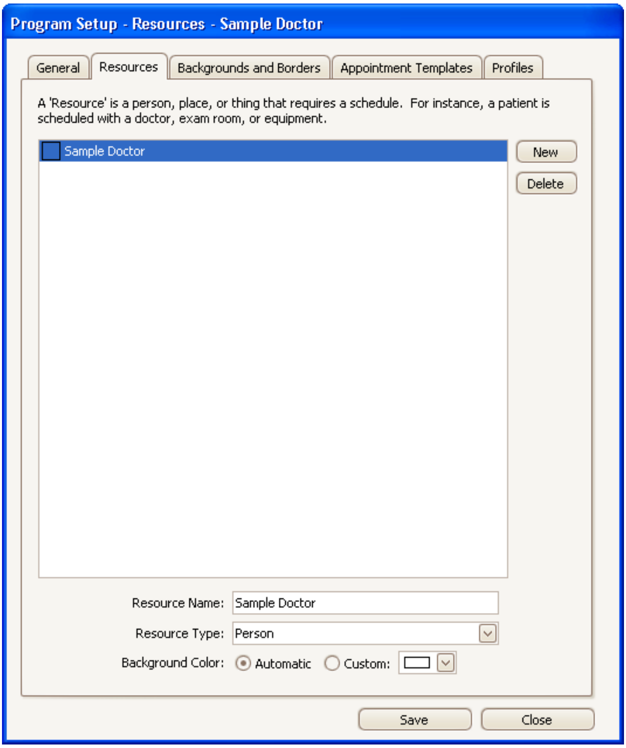
Enter the **Company or Individual** name and contact information under the 'General' tab. This information will be used in tasks such as printing reports. Follow the steps below.



1. Enter the following information.
   - Company or Individual Name
   - Address
   - Phone Number
   - Fax
   - Email
2. Check the option that prompts you to backup scheduler data regularly.
3. Select the time frame for backing up data. The normal setting is 7 days.
4. Check the 'Automatically check for program updates' to have the program check for updates when opened.
5. Check the 'Require a patient…' if you want every appointment to have a patient associated with it.
6. Click on the 'Save' button to save the changes. Notice the Save button turns red if information has changed on the form and needs to be saved.

Resources Tab

Resources are the 'Who, What or Where' that patients could have an appointment scheduled. Examples would be a doctor, an exam room or medical equipment. To create a new resource, follow the steps below. The name of the resource will be shown at the top of the calendar when viewing the program.



1. Highlight 'Sample Doctor' to edit or click the 'New' button.
2. At the bottom of the screen, change the 'Resource Name' to reflect your office requirements. Resource Name could be a Person, Place or Thing.
3. Select 'Resource Type'. Note: If the Resource name is a person, select 'Person'. If the Resource name is a place such as an exam room, select 'Place'. If the Resource name is related to things/equipment such

as the ECG or X-Ray equipment, then select ‘Thing’ as the Resource Type.

4. **Optional:** Select ‘Custom Color’. Custom color may be selected now or changed at a later time.
5. Continue adding ‘Resources’ by clicking on the ‘New’ button.
6. Click on ‘Save’ button.

When the window is closed, the new resource will be shown on the scheduler screen. Use the resource drop down on the side bar to change the active resources.

Deleting Resources

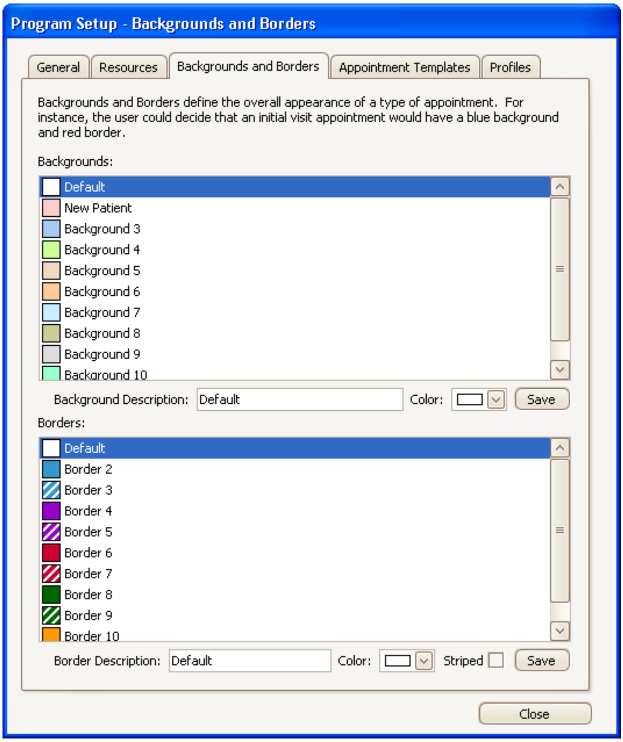
Resources can be deleted by clicking the resource and clicking the ‘Delete’ button.

Backgrounds and Borders Tab

Note: Backgrounds and Borders may be customized at any time.

Backgrounds and Borders affect the appearance of the appointments. Assigning ‘Backgrounds and Borders’ will assist with quick recognition of various appointment types when viewing the scheduling program.

To setup ‘**Backgrounds and Borders’** follow the steps below.



1. Select a background color and rename it to your office preference. Ex: A color may be selected to signify a ‘New Patient’ when entered in the scheduler.
2. Use the color drop down selector if you would like to change the color.
3. Click on ‘Save’ button.

Note: Backgrounds and Borders cannot be deleted, only the name and color can be changed.

Appointment Templates Tab

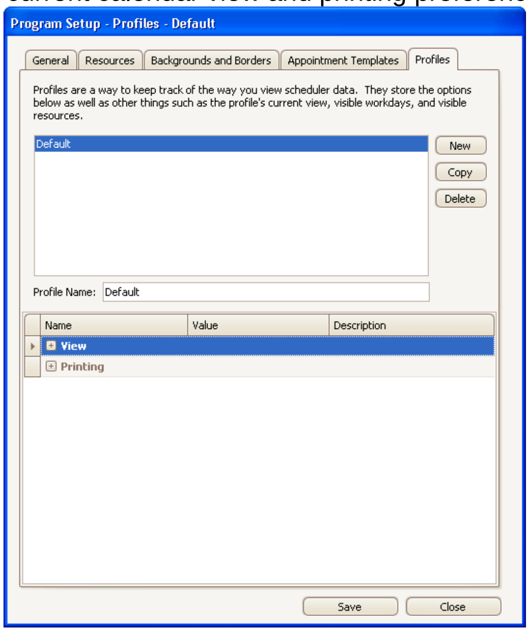
Note: Appointment Templates are an advanced feature. We suggest getting familiar with other aspects of the program before setting up appointment templates.

See “Appointment Templates” on page 41 for help in setting up and using appointment templates.

Profiles Tab

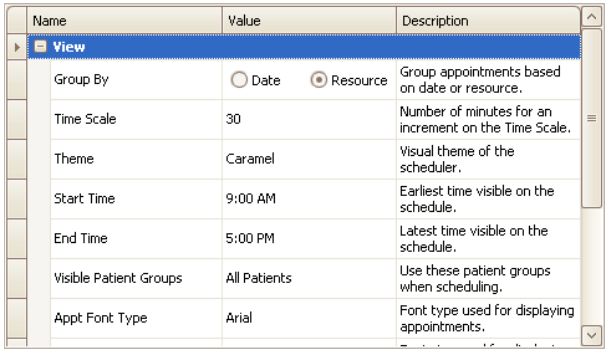
Note: Profiles may be set up or edited after the user becomes more familiar with EZClaim Scheduler.

Profiles 'remember' which resources are being viewed, along with the current calendar view and printing preferences.



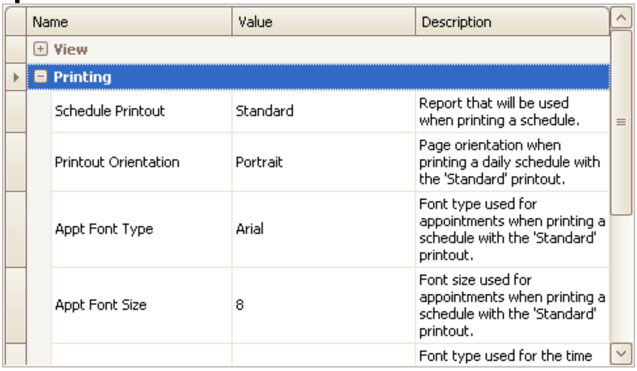
1. To create additional 'Profiles', click on the 'New' button.
2. Enter a name for the new profile under 'Profile Name'.
3. To select the items for 'View', click on the  button next to 'View'.
4. The expanded options for this Profile's view are;

Scheduler View Options



- Group By – Select to group appointments either by ‘Date’ or by ‘Resource’.
- Time Scale – This should be set to your most common appointment duration. If you normally schedule 15 minute appointments, enter 15.
- Theme – Using the drop down, select the overall visual Theme of the scheduler.
- Start Time – Set the ‘Start Time you would like to view on the schedule by clicking the up or the down arrow beside the Start Time.
- End Time – Set the ‘End Time’ you would like to view on the schedule by clicking the up or the down arrow beside the End Time.
- Visible Patient Groups – Select the groups you would like visible in the patient drop down list.
- Appt Font Type – Select the ‘Appointment Font’ from the drop down list.
- Appt Font Size – Select the ‘Appointment Size’ from the drop down list.
- Hide Appointment Times – Shows or hides the appointment times on each appointment. Saves room if you have a large number of appointments.
- Hide Appointment Images – Shows or hides the appointment icons on each appointment. Saves room if you have a large number of appointments
- Day View Resource Visibility – If set to dynamic and using ‘Day View’, the program will automatically hide the resources that do not have appointments. This helps when you have a large number of resources but they work part time. Prevents you changing the resource visibility all the time.

Printing Options



Click on button next to ‘Printing’ to select the Printing options for the specific profile.

- Schedule Printout – Select the Schedule Printout options from the drop down list. The available options are Standard, Appointment List, and Appointment List Detail.
- Printout Orientation – Used when printing the daily schedule.
- Appt Font Type – Select the Appointment Font Type from the drop down list of font types.
- Appt Font Size – Select the Appointment Font Size from the drop down list of font sizes.
- Time Scale Font Type – Select the Time Scale Font Type from the drop down list of font types.
- Time Scale Font Size– Select the Time Scale Font Size from the drop down list of font sizes.
- Hide Appointment Times – Shows or hides the appointment times on each appointment. Saves room if you have a large number of appointments. Only works with the ‘Standard’ printout.
- Hide Appointment Images – Shows or hides the appointment icons on each appointment. Saves room if you have a large number of appointments. Only works with the ‘Standard’ printout.

Click on ‘Save’ button to save your changes.

Additional Profile Tools

To copy and then edit the settings from an existing profile, click on the ‘Copy’ button. Rename Profile and edit any options.

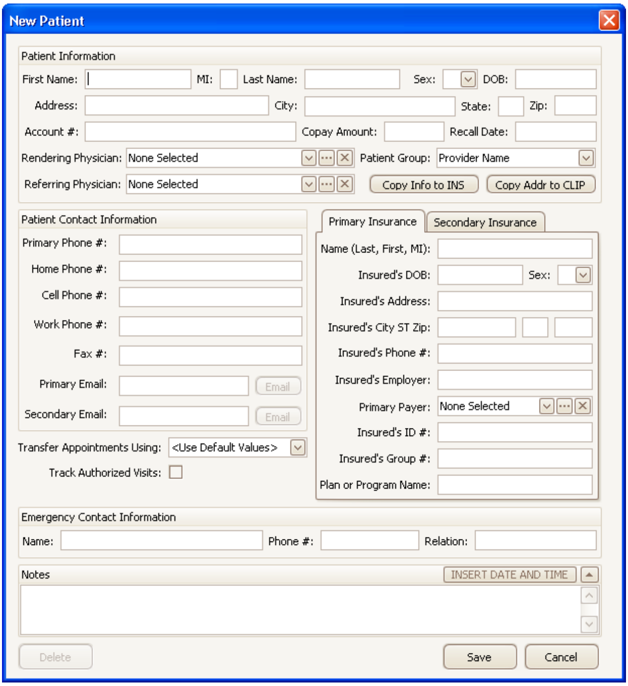
A Profile may also be deleted. Highlight the profile to be deleted and then click on the ‘Delete’ button.

Add a New Patient

Methods to open the New Patient Window

- Click the button in the patient selection drop down on the left side bar.

- Click the New Patient icon on the Toolbar
- Click the Patient menu and select ‘New Patient’
- Click the Patient menu and select ‘New Patient with Template’



Enter Patient Information

1. **The patient’s first and last name is required.** All other fields are optional. Some fields are shared with EZClaim and you may be able to use dropdown arrows to select data.
2. Optional: To open the Physician or the Payer Library click on the button next to the field. For

additional information regarding Payer and Physician Library see "EZClaim Integration" on page 50.
3. Once data is entered click on 'Save'.

New Patient Using a Template

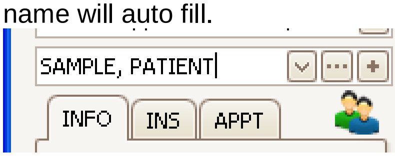
Note: User must have access to the EZClaim program. Patient Templates are set up in the EZClaim program. See the EZClaim Manual for 'Patient Templates' for more information on patient templates.

1. Click the Patient menu
2. Select 'New Patient with Template'. You will see the following screen

3. Select the template you wish to apply for the Patient.
4. Click on 'Use' button.
5. If you click on 'Cancel' button, it's the same as adding a patient without a template.

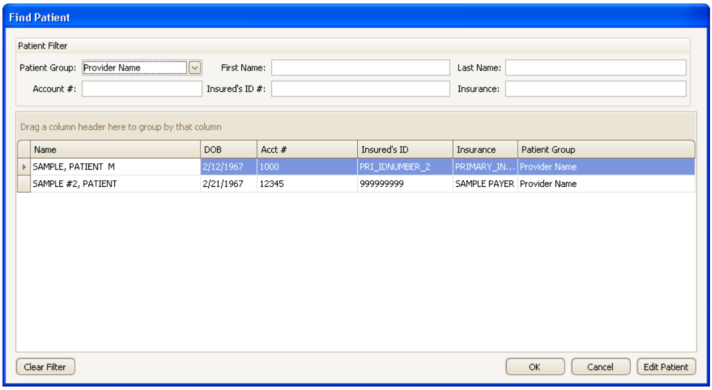
Selecting a Patient

In the Patient selection drop down on the side tool bar, begin typing the patient's Last name. If the patient is in the list, the name will auto fill.



Finding a Patient

Other options are to click on the  button in the patient selection drop down or use the  **Find Patient** tool bar icon to search for an existing patient. The 'Find Patient' option is also available in the 'Patient' menu.

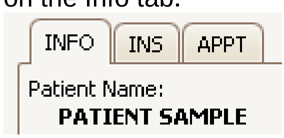


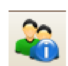
As you start typing into the Patient Filter items, the list will reflect the matching patients.

Editing a Patient

Before editing a patient, you must first select the patient you wish to edit. There are various ways to 'Edit' a patient.

- Select the patient then double click the patient name on the Info tab.



- Select the patient then click on the  **Edit Patient** icon on the tool bar.
- Go to Patient menu and select 'Find Patient'. Highlight patient and click on 'Edit Patient'.

In the 'Edit Patient' screen, edit patient data and click on the 'Save' button.

Navigate Patients

The scheduler allows you to move back and forth among patients previously loaded. Much like internet browsers have a back and forward button. There are two Navigation options.

- To move to the previous patient record, select Previous Patient in Patient Menu. 

- To move to the next patient record, select Next Patient in Patient Menu. 

Deleting Patients

IMPORTANT: Patients cannot be deleted from the Scheduler if the patient has claims in EZClaim’s medical billing software.

1. Use the instructions to Edit the patient record
2. Click the Delete button.
3. Click Yes to the confirmation.

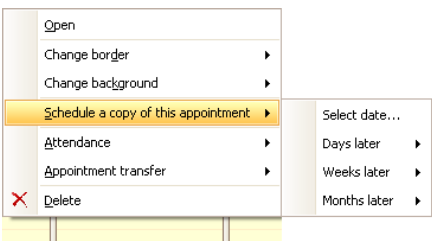
Appointments

Creating Appointments

1. **Optional:** Select ‘Appointment Template’ in the side bar.
2. On side tool bar, select a patient.
3. ‘Drag and Drop’ the small patient icon  into the appointment time.
4. Resize the appointment by dragging the borders up or down if needed.
5. **Optional:** Right click the appointment to change the status or double click the appointment to edit all properties of the appointment.

Reschedule or Copy an Appointment

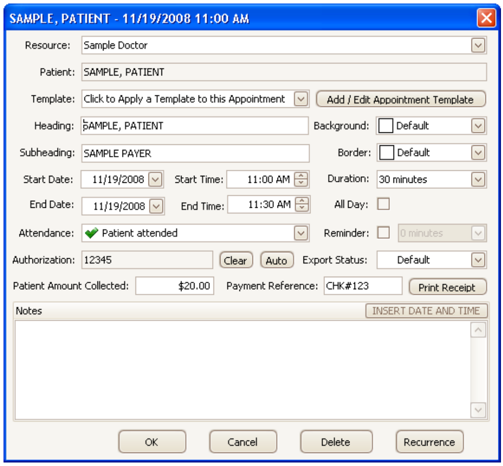
Appointments can be rescheduled or copied to another date. Right click the appointment, select ‘Schedule a copy of this appointment’ then select the correct date.



Editing Appointments

Methods for Editing appointments are:

- ‘Drag and Drop’ the appointment to a different appointment time.
- Resize appointment on main screen using the mouse to add or decrease appointment time.
- Right click on appointment time to set options.
- Double click on patient’s appointment to open Appointment dialog box.



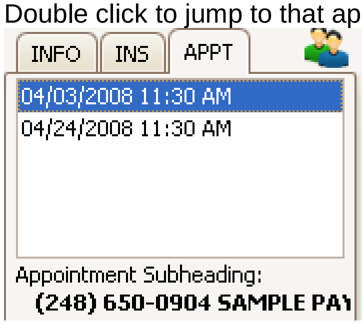
Changing the Start and End Times

You can click on any part of the field to change. Example, click AM and use the arrows to change to PM or click the hours or minutes to change using the arrows.

Finding Appointments

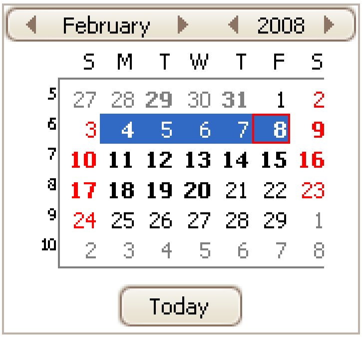
Finding a Patient's Appointments

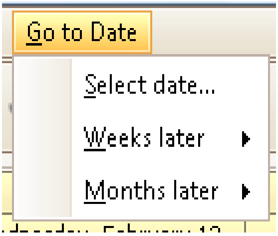
1. Select the patient in the patient selection drop down in the side tool bar.
2. Click the APPT tab to view the appointment list. Double click to jump to that appointment



Finding a Day's Appointments

Appointments may be viewed on the main screen by highlighting a date on the side tool bar calendar. Dates may also be viewed by going to the 'Go To Date' on the menu bar.



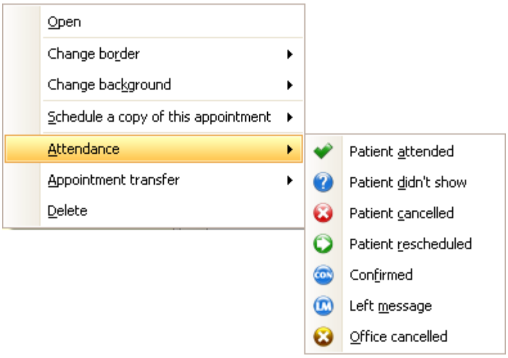


Deleting an Appointment

Right click on any Appointment and select ‘Delete.’ You can also click once on the appointment and press the delete key on the keyboard. When you click the Delete key, you will be asked to confirm if you wish to delete the appointment.

Attendance Status

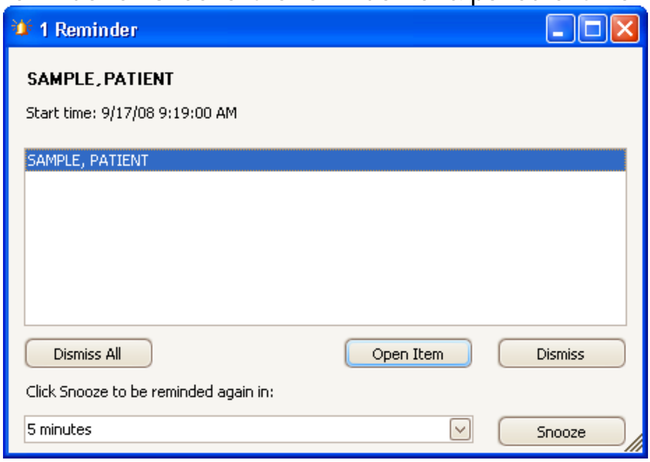
Appointments can be assigned different attendance statuses. To assign a status, right click the appointment and select Attendance, another menu pops up. Select the appropriate status. An icon will appear within the appointment window.



Reminders

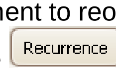
Reminders can be set for each appointment. Double click the appointment to edit and check the reminder check box. Set the amount of time before the appointment occurs for a popup reminder.

Once the reminder popup appears, you can dismiss the reminder or 'snooze' the reminder for a period of time.

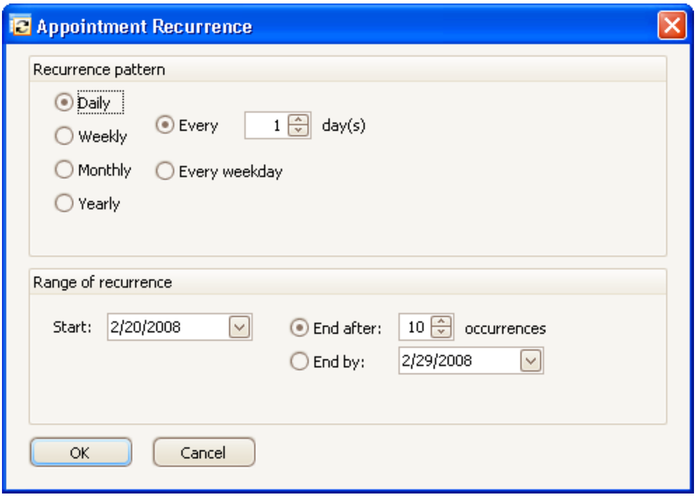


Appointments with reminders have a special icon showing that a reminder has been set.

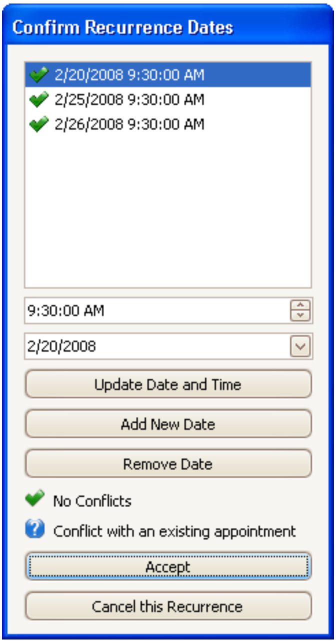
Recurring Appointments

If you would like to schedule an appointment to reoccur, double click the appointment and use the 

button on the edit appointment screen. This will open the Appointment Recurrence screen.



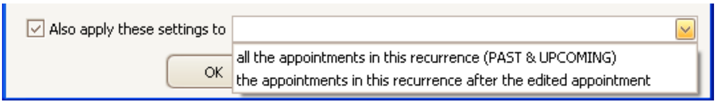
Enter the recurrence pattern and click OK to return to the Appointment edit window. When you click OK to close the appointment, you will be asked to confirm the appointments to create.



This window shows the appointments to be created and helps you determine if there are any conflicts with existing appointments. Click Accept when you are finished. Appointments will be created and shown in the schedule.

Editing a Recurring Appointment

If you need to edit a recurring appointment, double click the appointment. At the bottom of the screen you are given an option to apply the changes to other appointments in the recurrence.



1. Check the box on the left
2. Select the appropriate choice
3. Click OK.

Individual appointments within a recurrence can be moved around a schedule without affecting the others. This helps avoid conflicts or adjust to the patient's available time.

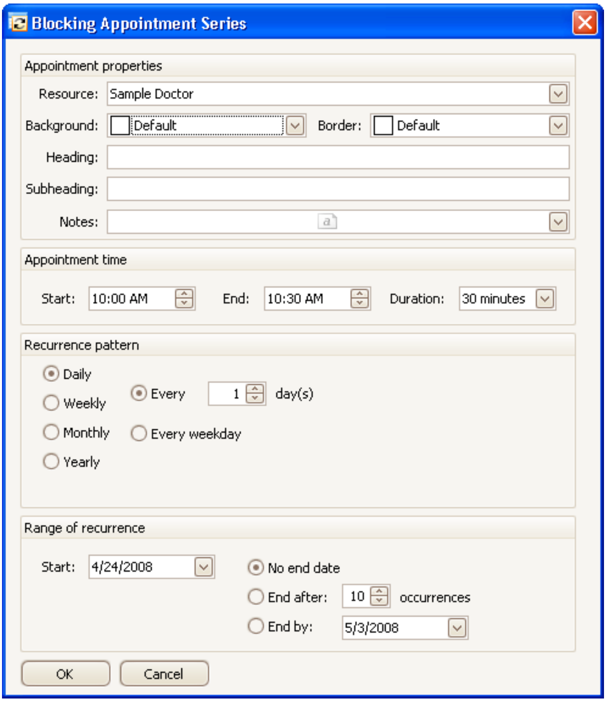
Blocking Appointments

Blocking appointments are used to block out time a resource is not available. A blocking appointment can be a recurring appointment so it's easy to set a blocking appointment for the office lunch time.

Methods to set a 'Blocking Appointment':

- Right click a time in the scheduler view and select 'New Blocking Appointment'
- Click 'Appointment' on the menu bar and select 'New Blocking Appointment'.

The blocking appointment window allows you to set the color, time and duration. Use the Recurrence pattern and Range of recurrence to set how many times and on what days the appointment occurs.



Edit a Blocking Appointment

Methods to edit a blocking appointment

- Double click the blocking appointment in the calendar view
- Right click and select Edit Series

Delete a Blocking Appointment

When deleting a blocking appointment, there are two options to delete. You can delete the whole series or just the single blocking appointment. Make the appropriate selection and click OK.

Printing a Schedule

Methods to print a schedule:

- Use the tool bar icons to print or preview a schedule
- Click the File menu and select 'Print Schedule…'

What appointments will be Included on the Printout?
The 'Print Schedule' function will include all the resources and appointments shown in the current view.

If you are in 'Day View,' the printout will include a single day's appointments. If you are in 'Week View', then the printout will show a week's worth of appointments.

Use the  tool bar icon to **print** the schedule.

Use the  tool bar icon to **preview** the schedule.

The standard schedule print out is a graphical representation of what you see on the screen. To change the schedule to a different report, see "Profiles Tab" on page 18. The setting is the 'Schedule Printout' option in the 'Printing' section.

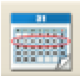
View Options

View options are configured with the side bar options and tool bar icons. The two main options are what days are visible and what resources are showing.

Calendar Views

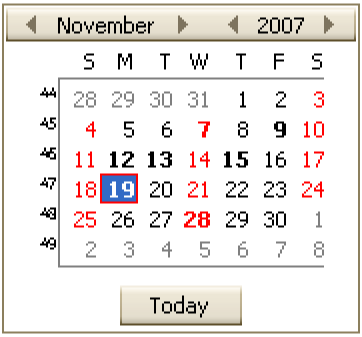
To select the desired calendar view, click on one of the following Icons. Click on any of the icons to switch between views.

Click on ‘Day View’ to view one day only.


‘Work Week View’ for setting work week options.

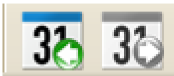

‘Month View’ to view the whole month.

The highlighted days on the side bar calendar will change to reflect your view format. If you need to change to a different day, week, or month, simply select the date.



Date Navigation

You can use the forward and back tool bar icons to jump back and forth between previously viewed dates.



Work Day Visibility

When working in ‘Work Week View’, a new menu option called ‘Work Day Visibility’ is available. Clicking this menu allows you to hide days that the office is closed. Uncheck the days you would like hidden.

Resource Selection

To change the doctors (or other resources) showing on the screen, use the resource selection drop down on the side bar. Resources are setup in the program setup window (Tools > Program Setup), see “Resources Tab” on page 15.

One or more resources may be selected and will be viewed on the scheduler to the right. Example: If Sample Doctor and X- Ray Room are checked, both Resources will be viewed on the scheduler.

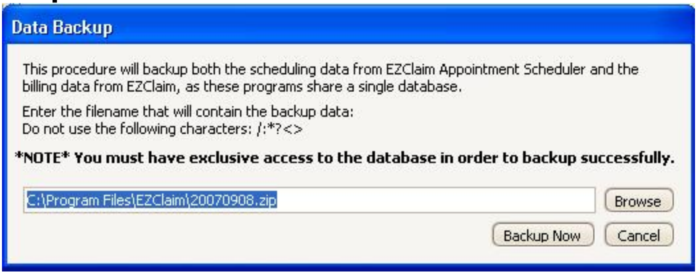
Backup and Restore

IMPORTANT: The backup and restore functions affect BOTH the EZClaim medical billing software and the scheduling software. When you restore data, be sure you understand that you are also restoring billing data to an earlier date.

All the scheduling and billing data is contained in a single file. You cannot partially backup or restore data. When data is restored, you are restoring back to a point in time. Any data entered after that time will not be available.

Click the File menu and select 'Backup/Restore Utilities'

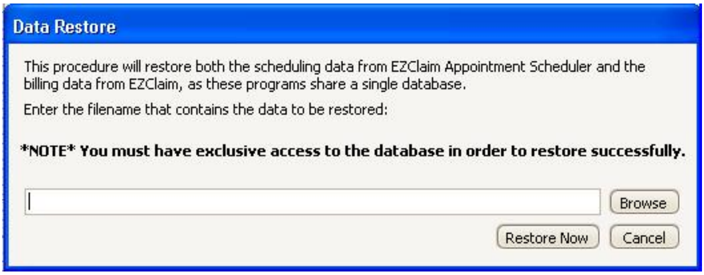
Backup Data



The Data Backup Screen allows backup of both the scheduling data from EZClaim Appointment Scheduler and the billing data from EZClaim. In order to backup the data, you must be the only one in the system.

Browse – Allows selecting the location and filename of the backup.
Backup Now – Backs up the scheduling and billing data.

Restore Data

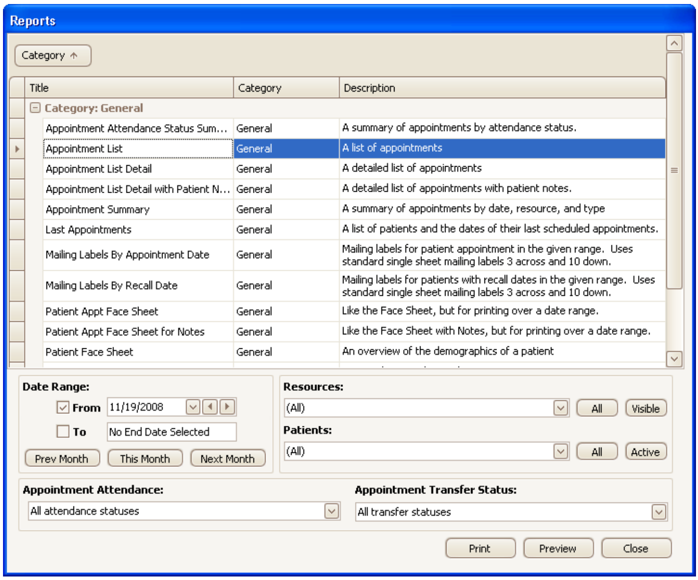


The Data Restore Screen helps to restore both the scheduling data from EZClaim Appointment Scheduler and the billing data from EZClaim. In order to restore the data, you must have an exclusive access to the database.

Browse – Allows selecting the location of the restore file.
Restore Now – Restores both the scheduling and billing data.

Reports

Open the reports window by clicking the File menu and select Print Reports…
Reports can be printed with various criteria. Before printing you must select the report you wish to print.



1. In the Reports Screen, select the report to print.
2. If a date range is required, check the From and/or To box then select the dates. If you would like to see all appointments from today forward then you would only check the 'From' box. The current date is automatically entered. You can also use the 'Previous Month', 'This Month', and 'Next Month' buttons for quickly selecting a date range.
3. Select Resources from the drop down list. If you wish to print the reports of all Resources, select the 'All' button. You can also choose to select the same resources that are visible on the main screen by clicking on the 'Visible' button.
4. Select Patients from the dropdown list. If you wish to print a report of all Patients, click on the 'All' button. If you wish to print only the currently selected Patient on the main screen, click on the 'Active' button.

5. Select the status of the Appointment Attendance from the drop down list.
6. Select Appointment Transfer Status from the drop down list.
7. If you wish to preview the report before you print, click on ‘Preview’ button.
8. Finally, click on ‘Print’ button to print the report.

Superbill Report – Refer to the topic “Superbill Report” on page 50 for information on customizing the superbill for your practice.

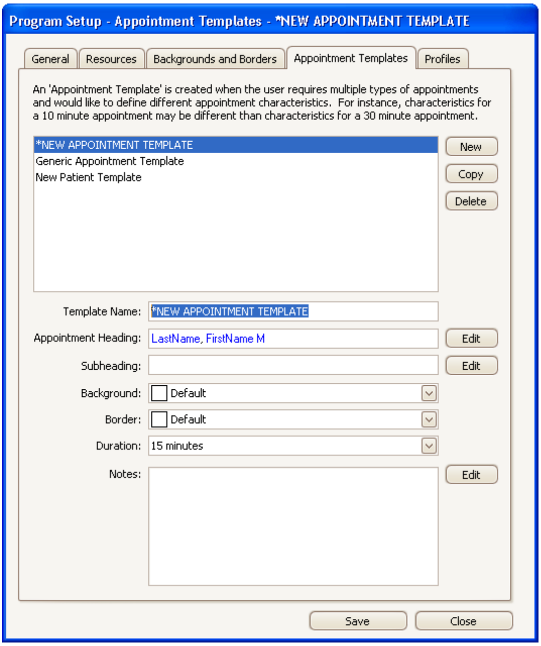
Appointment Templates

Overview

Appointment Templates speed the creation of different appointment types. Example**:** New Patient appointment characteristics such as background color might be different than for repeat appointments. These templates allow you to define a set of characteristics such as Background, Border, Duration, etc.

Creating Simple Appointment Templates

Appointment templates are created in the Program Setup window. Click the Tools menu and select Program Setup. Click the Appointment Templates tab.



1. Click on the ‘New’ button or highlight and then edit the Generic Appointment Template.
2. Enter a ‘Template Name’.
3. Select a background color.
4. Select a border color.
5. Select a Duration
6. Click the Save button.

See “Using Appointment Templates” on page 43 for more information.

Creating Advanced Appointment Templates

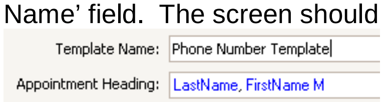
When creating appointments using templates, the program has the ability to insert data from the patient’s record (the data you see on the ‘Edit Patient’ screen). This can include insurance information, patient contact details and so on. It can also include text you enter such as ‘Make sure to get new insurance information’. When creating advanced appointment templates, you will tell the program what text to enter and which fields from the patient record will make up the header or notes.

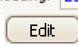
The ‘Appointment Heading’, ‘Subheading’, and ‘Notes’ fields have the capability of pulling data from the patient record. When a template is first created, the program will automatically enter ‘LastName, FirstName M’ into the Appointment Heading field. This can be edited if needed.

In this example, we will create a Subheading that shows the patient’s home phone number.

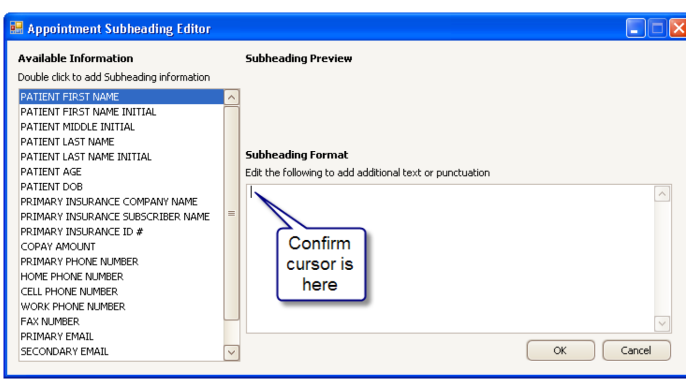
1. Create a new template by clicking the 

button.
2. Enter ‘Phone Number Template’ into the ‘Template Name’ field. The screen should look like this:



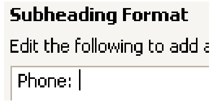
3. Click the 

button next to the Subheading field. This will open the Subheading editor screen.

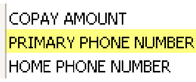


4. Confirm the cursor is in the Subheading Format field.

5. Enter the following text: ‘Phone: ’

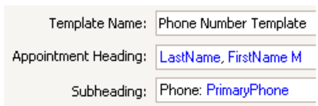


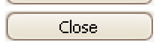
6. With the mouse, double click the ‘PRIMARY PHONE NUMBER’ item from the list on the left.

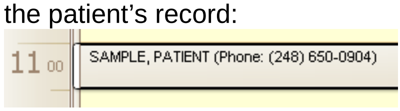


7. This will cause [PRIMARY PHONE NUMBER] to be entered into the Subheading Format field.

8. Click OK to save the changes. The screen should now look like this:



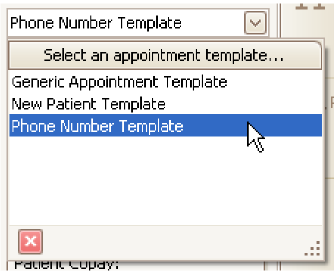
9. Click the  button to save the template.
10. Click the  button to close the Program Setup window.
11. When you use the template to create an appointment (see Using Appointment Templates), it will look like the following. The [PRIMARY PHONE NUMBER] was replaced with the phone number in the patient’s record:



IMPORTANT: Information used from the patient record is not linked. In our example, this means if someone changes the primary phone number in the patient’s record, the program will not update the phone number shown in the appointment.

Using Appointment Templates

In the side bar, use the dropdown to select an appointment template. When an appointment is created, the currently selected template will be used to create the appointment.



Applying a Template to an Existing Appointment

If needed, you can apply a different template to an existing appointment or even reapply the same template (to update any changed information).

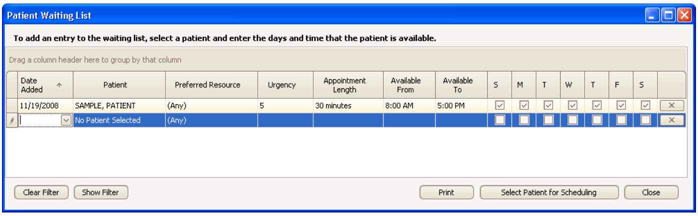
1. Double click the appointment to open.
2. Use the Template drop down to select the template to apply.

3. Click OK to save your changes or Cancel to undo them.

Appointment Waiting List

To open the waiting list, click the Appointment menu and select Waiting List.

The **Patient Waiting List** Screen provides an easy way to enter and manage the patients waiting for appointments.



To view the patient's contact phone numbers, click the patient's name and a drop down will appear showing the phone numbers.

You can sort the grid by clicking on the column headings.

Adding a Patient to the Waiting List

In the column where it says 'No Patient Selected', enter the patient's name (you may need to scroll down to the bottom of the list if it's not visible). You can also use the drop down to select from the list. Please note the patient must already be in the system to be added to the waiting list.

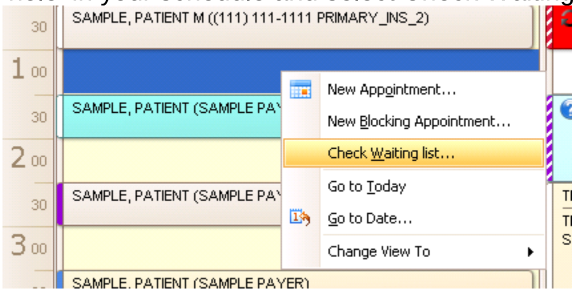
Fill in the remaining columns according to the patient's availability and the appointment length.

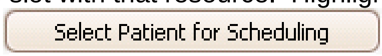
Removing a Patient from the Waiting List

You can remove a patient from the Waiting List by clicking on  button on the specific patient row.

Using the Waiting List

The easiest way to use the waiting list is to right click on a 'hole' in your schedule and select Check Waiting List….



The program will then show a list of patients available for that time slot with that resource. Highlight the patient and click the 

button to add the appointment.

If needed, you can modify the 'Waiting List Filter' options at the top of the screen. To clear the filter and show all the patients, click the 

button.

Printing the Waiting List

Click the 

button to print a report of the waiting list

Tracking Authorizations

Overview

EZClaim's Scheduler program can track patient visit authorizations. It does so through the use of an authorization library that holds the patient's authorization numbers and the assigning of an authorization number to each appointment.

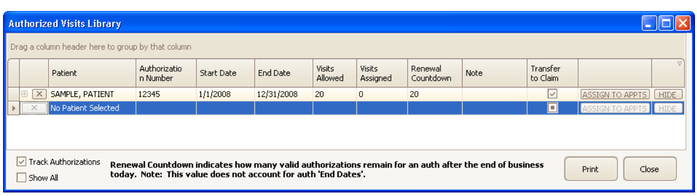
Authorizations are tracked on a patient by patient basis. Be sure the 'Track Authorizations' is checked on the 'Edit Patient' window.

If you no longer want to track authorizations for a patient, uncheck the 'Track Authorizations' box on the 'Edit Patient' screen. If authorizations exist for the patient, a confirmation box will appear asking if you are sure you want to delete the patient's authorizations from the library.

Authorization tracking can be disabled system wide by unchecking the 'Track Authorizations' check box on the library window

Authorized Visits Library

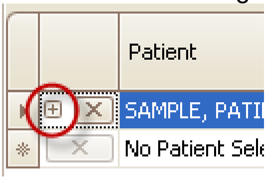
Click the Tools menu and Authorized Visits Library to open the window.



Enter the patient name, authorization number, date range and the number of allowed visits. The visits remaining will be calculated automatically.

If you would like to turn off authorization tracking, uncheck the 'Track Authorizations' check box.

Click the + button to show the appointments the authorization is assigned to.



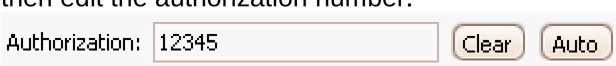
Transfer to Claim – Uncheck this box if you do not want the authorization number to be transferred to EZClaim. See “EZClaim Integration” on page 52 for more information.

Assign to Appts – Click this button to assign the authorization to existing appointments that fit the authorization time frame.

Assigning Authorization Numbers

Authorization numbers are automatically assigned when an appointment is created. The program will assign the most likely number from the list in the authorization library. It first looks for the correct patient, then the date range, then the number with the least remaining visits.

If you would like to manually remove or change the authorization number, you can double click the appointment then edit the authorization number.



Use the ‘Clear’ button to clear the auth number or the ‘Auto’ button to assign a number.

Assigning Authorization Numbers after the appointments have been created

If the authorization number is entered AFTER the appointments have been created, click the Assign to Appts button. The program will look for the patient’s appointments that fall within the authorized date range and automatically assign the correct authorization number. If an appointment exists with an invalid authorization number, the new, valid number will be assigned.

Printing the Authorization Library

Click the Print button to print the grid currently being viewed.

Determining the Authorization Status

If a patient has authorization tracking turned on, their appointments will show an icon representing the authorized status.

 - Appointment has an authorization number and is valid meaning it's within the date range and is in the number of allowable visits.

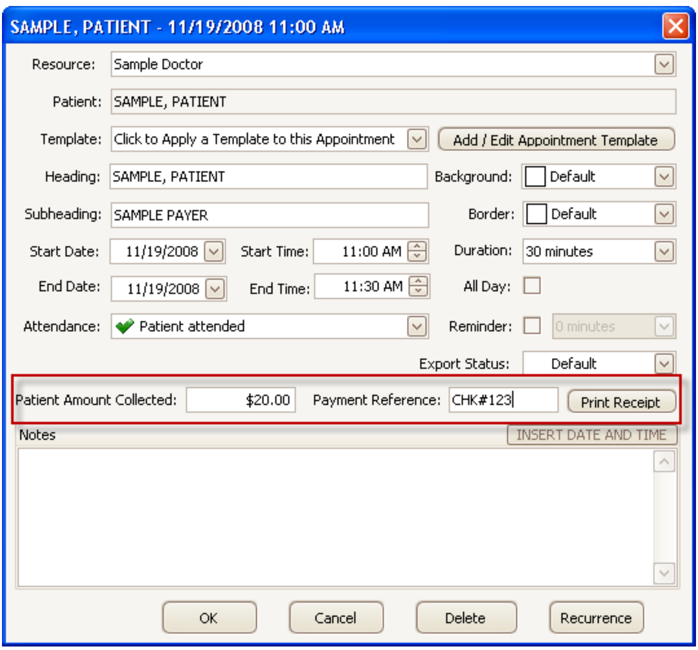
 - Appointment has an authorization number, it is valid, but it's one of the last three authorized visits, you may need to obtain a new authorization soon.

 - Appointment is not authorized. This could mean it falls outside the date range, surpasses the number of visits allowed, or does not have an authorization number assigned.

Patient Payments

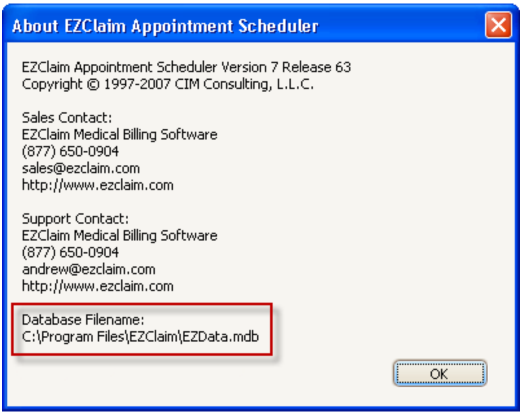
The scheduler can record a patient payment and print a receipt. During the checkout process, double click the patient's appointment and enter the amount paid, reference number, then click the 

button. If you transfer appointments to EZClaim, the payment will be transferred as well. See "EZClaim Integration" on page 52 for more information.



Superbill Report

The Superbill report can be customized by editing the superbill.rtf file located in your system. The file is in the same location as the scheduler database. The database location can be determined by clicking the Support/Help menu and clicking 'About EZClaim Appointment Scheduler'. In this example, the superbill.rtf will be located in the C:\Program Files\EZClaim directory.



Use any word processor to edit the superbill.rtf file. Be sure to save the file in the rtf format.

EZClaim Integration

The scheduler shares the patient information with EZClaim. Changes made to the patient information in EZClaim are reflected in the Scheduler and the other way around, changes made in the scheduler are reflected in EZClaim.

There are also some shared libraries. Both the Physician/Facility library and the payer library are available in the Scheduler, even though the scheduler does not require either of the libraries to be used, it's convenient for the user to be able to populate extra data within the scheduler without having to open the EZClaim program. EZClaim considers the medical billing software to be the controller of information. Therefore, you are unable to delete any of the physician/facility or payer library entries. This must be done in EZClaim.

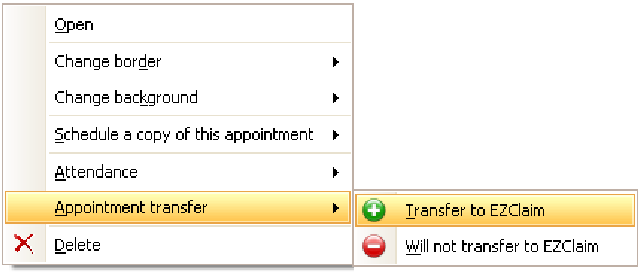
One of the benefits of using the Scheduler and EZClaim Medical Billing together is the ability to transfer appointments and generate claims. The transfer function makes use of EZClaim's claim templates feature. Even though this is not required, claim templates may help in preventing extra data entry once an appointment has been transferred to billing.

Locking Patient Records

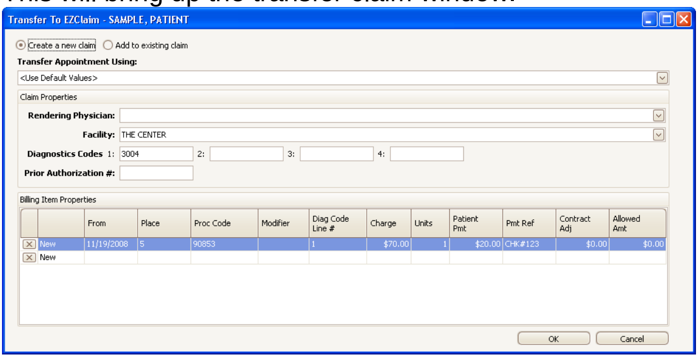
If the billing person would like the patient record to be locked, this is possible by checking the 'Lock patient record' check box in EZClaim on the Payers/Other Info tab. If this box is checked, the scheduler program can view patient data but is unable to edit it. The scheduler will show a message on the Edit Patient screen saying 'This record has been locked in EZClaim.'

Transfer to EZClaim

To transfer an appointment to EZClaim, simply right click the appointment and select Transfer to EZClaim.



This will bring up the transfer claim window.



There are options available that determine how the claim will be created in EZClaim:

Create a new claim or Add to existing claim

If the 'Add to existing claim' is selected, the program will find a patient's claim that has not been printed or exported and will add the services to the existing claim. 'Create a new claim' will create a new claim regardless of any existing claims.

Transfer Appointment Using

This setting allows you to pick the template that contains the services lines that will be used when creating the claim.

- <Use Default Values> - This setting will add a single line item based on the default values found on the Physician/Diagnostic screen in EZClaim.
- <Use Previous Claim> - This setting will duplicate the previous patient claim but change the date to match the appointment's date.
- Existing Claim Template – This setting will use the template's service lines to generate the new claim.

Claims templates are setup and managed within EZClaim’s medical billing software.

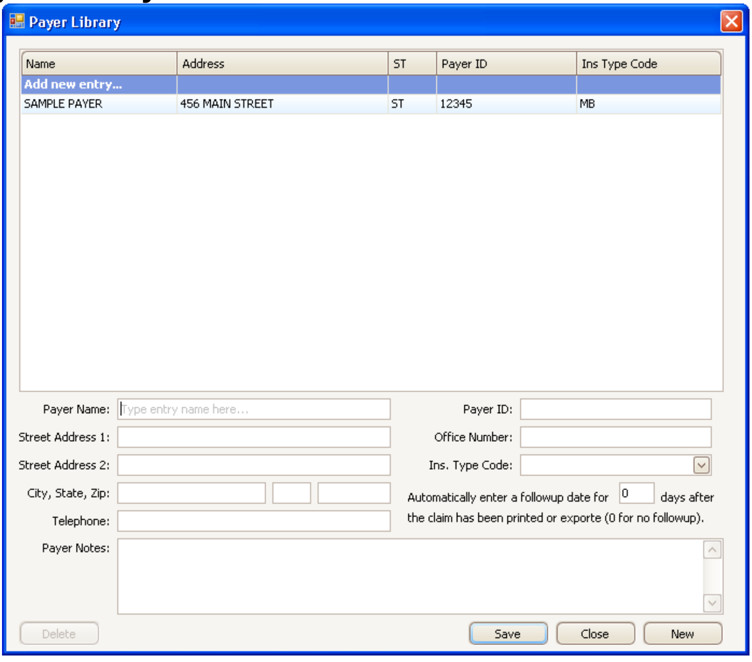
Claim Properties

The claim properties can be set as the user requires. The rendering provider, facility, and diagnostic codes may be set with the claim template but can be changed before the transfer takes place.

Billing Item Properties

The billing item properties show the service lines that will be created during the transfer. When you have ‘Create new claim’ checked, all the service lines will have ‘New’ in the first column. If you are adding to an existing claim, the first column will show ‘Existing’ and ‘New’

Payer Library



The **Payer Library** Screen has the details related to the Insurance Payer. It has the following details.

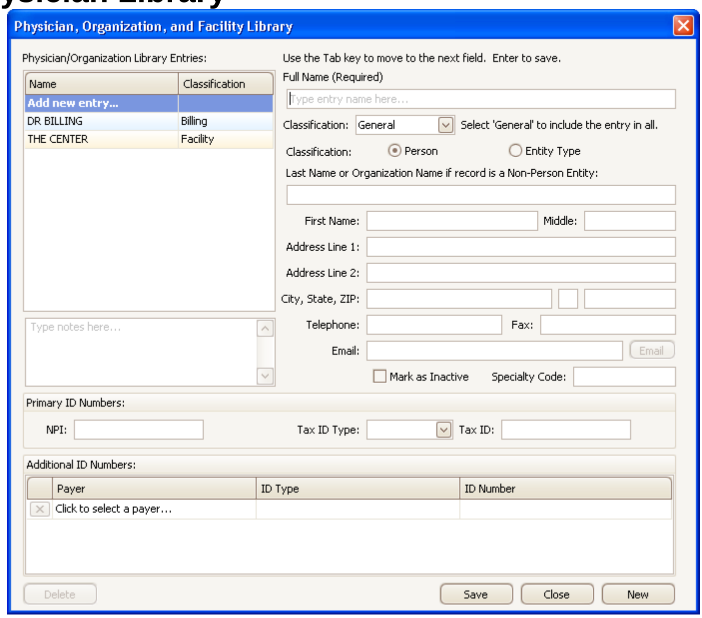
- Payer Name
- Street Address

- City/State/Zip / MI
- Telephone
- Payer Notes
- Payer ID
- Office Num
- INS Type Code

Add/Save – Allows to Add or Save the information related to the Payer Library Screen.

Edit – Allows to Edit the information related to the Payer Library Screen.

Physician Library



The **Physician Library** Screen allows you to enter information related to the physicians. It has the following details.

- Physician / Organization Library Entries
- Full Name
- Classification
- Last Name or Organization Name if record is a Non Person Entity
- First Name
- Middle

- Address
- City State Zip
- Telephone
- Email
- Fax
- NPI
- Specialty Code
- Tax ID Type
- Tax ID
- Notes

Additional ID Numbers include the following details

- Payer
- ID Type
- ID Number

Index