Section Two Overview

It is important to be able to access patient information by several means. The system allows you to search by multiple sources, other than name, and the access additional patient detail directly from that point. This section covers the ability to find a patient and then update demographic and account information (such as insurance, employer and contact person). New patient registration is initiated from this screen.

Section Two Learning Objectives

1. You will search for and locate a patient by phone number.

2. You will update demographic information for an existing patient.

3. You will add two patients and their insurance information to the system.

4. You will edit insurance information for two patients.

5. You will add a new insurance account (Work Comp) for an existing patient.

Find Patient

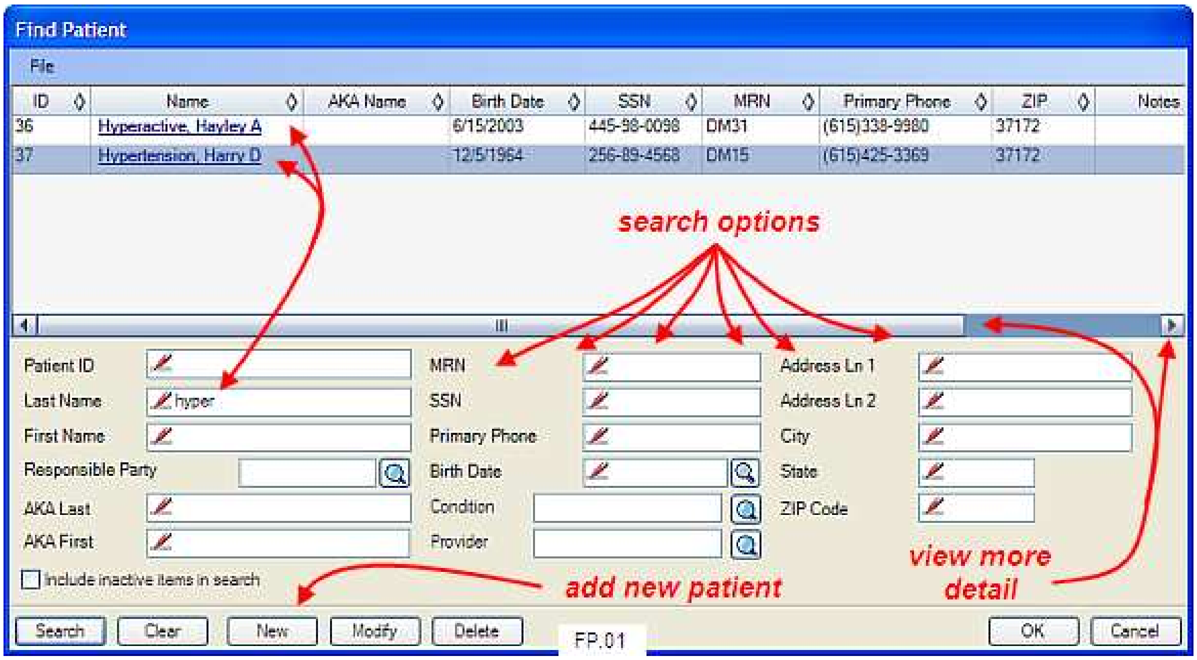
The Find Patient option is available from the Desktop menu option (either from the Desktop or Demographics) or from the icon from any patient toolbar.

Find Patient allows you to search by Patient ID, Last Name, First Name, Responsible Party, AKA Last, AKA First, Medical Record Number, Social Security Number, Primary Phone, Birth Date, Condition (medical condition indicator assigned through patient demographics), Provider, Address Line 1, Address Line 2, City, State, and/or Zip. Click on New to add a new patient for the facility *(FP.01)*.

- From the **Desktop**, click on to access the **Find Patient** window.
- In the **Last Name** field, enter ***Hyper*** and click on Search. Patient's ID, Name, AKA Name, Birth Date, SSN, Medical Record Number, Primary Pone Zip Code, Notes, Provider and Condition display for any patient fitting the search criteria.

- Either click on ***Harry Hypertension*** *(underlined)*, or with his name highlighted, click on OK. The **Patient Demographics** window for Harry Hypertension displays.

- Click on ☒ to exit this window. Demographics will be addressed later in this section.



Exercises

- Access **Find Patient** and search for a patient with the first name of ***Sally***.

- Click on Clear to clear the search fields and search for a patient with a medical record number of ***DM11***.

- Click on Clear, then search for a patient with the social security number of ***508-42-6587*** *(no dashes required; partial numbers accepted when first digits of the number are entered, i.e.,* ***5084****).*

- Click on Clear, then search for a patient with the phone number ***615-548-3365*** *(search with or without an area code; no formatting required; partial numbers accepted)*

- Click on Clear, then search for a patient with a birth date of ***05/07/1955*** *(must use a 4-digit year; formatting is not required).*

- Click on Clear, then search for a patient with a condition of ***HTN/HiChol*** *(click on* 🔍 to see available conditions*).*

- Click on Cancel to exit **Find Patient**.

Patient Demographics

A patient's demographic information can be accessed from the Desktop or from Find Patient. Demographic information includes patient information, insurance policies, emergency contact information, employment details, pharmacy information, web-based questionnaires and additional notes.

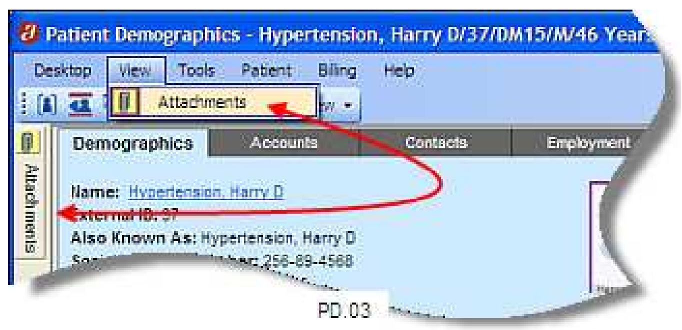
Patient Demographics Menus

The menu options at the top of this window are similar to those on the Desktop. Additional information about every menu option is available from the online help option and will also be covered in classes utilizing the additional options.

- From the **Desktop**, click on and search for and select ***Harry Hypertension*** (highlight and click on OK or click on name hyperlink).

Desktop Menu: Desktop The Desktop menu options are the same items that are accessible from the Desktop. See Section 1 of this manual for a description of these options.

View Menu: View The View menu option allows you to display or suppress the attachments tab *(PD.03)*.



PD.03

Tools Menu: Tools The Tools menu options allow you to customize the system in certain areas, access setup files, perform minor maintenance related to your workstation and settings, and track electronically transmitted prescriptions. See Section 1 of this manual for a description of these options.

Patient Menu: Patient The Patient menu options allow you to access information related to this patient *(PD.04)*.

Appointments displays all appointments scheduled for this patient.

Patient Cases displays the Patient Cases option for this patient.

Superbills displays superbills for this patient.

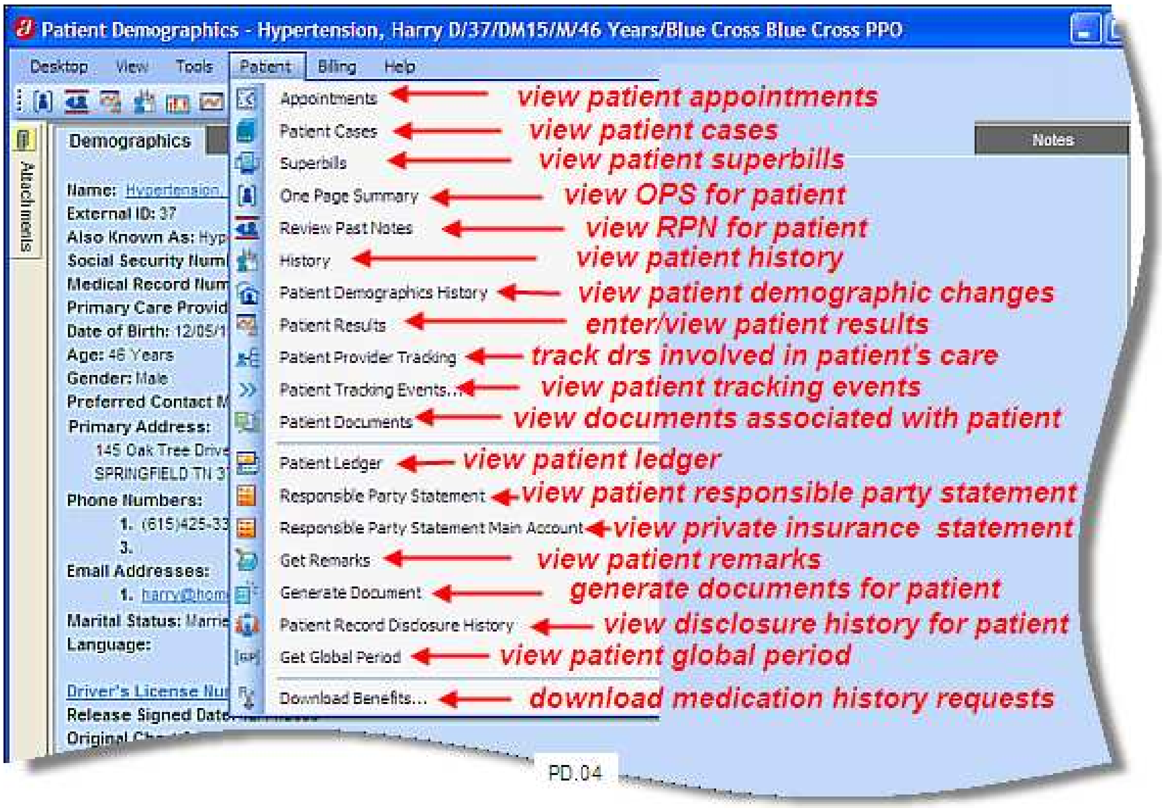
One Page Summary displays the One Page Summary for this patient.

Review Past Notes displays Review Past Notes for this patient.

History displays patient history for this patient.

Patient Demographics History displays changes made to patient demographic record.

Patient Results enables you to record or review results related to services ordered or services performed (lab, doctor's orders, etc.) for this patient.



Patient Provider Tracking provides information about providers and service sites associated with a patient's care.

Patient Tracking Events... displays tracking events recorded for this patient.

Patient Documents displays a list of documents associated with this patient.

Patient Ledger genereates a patient ledger for this patient.

Responsible Party Statement generates a responsible party statement for this patient

Responsible Party Statement - Main Account generates a statement for patient's main account only. If the patient has another account, such as Work Comp, those charges would be excluded.

Get Remarks displays remarks for this patient.

Generate Document enables you to produce a custom document, such as a letter or medical excuse, for the patient.

Patient Record Disclosure History displays information on disclosure of patient medical information.

displays any current or global period information associated with this patient.

accesses the Prescription Download Patient Medication History option.

Billing Menu: The Billing menu options relate to the practice management system and related billing functions. See Section 1 of this manual for a description of these options.

Help Menu: The Help menu provides information about the system, including on-line help documentation and information about the release and version number currently running at your facility. See Section 1 of this manual for a description of these options.

Quick Link Icons

Quick Link icons are available to access additional information for this patient. They include:

accesses the One Page Summary for this patient.

accesses Review Past Notes for this patient.

accesses results for this patient.

accesses information about other providers involved in the patient's care

accesses the patient's history information and allows for additions and updates.

accesses growth charts for this patient.

accesses chart observations (graphing vitals, labs) for this patient.

used to generate a document for this patient.

used to import advanced directives.

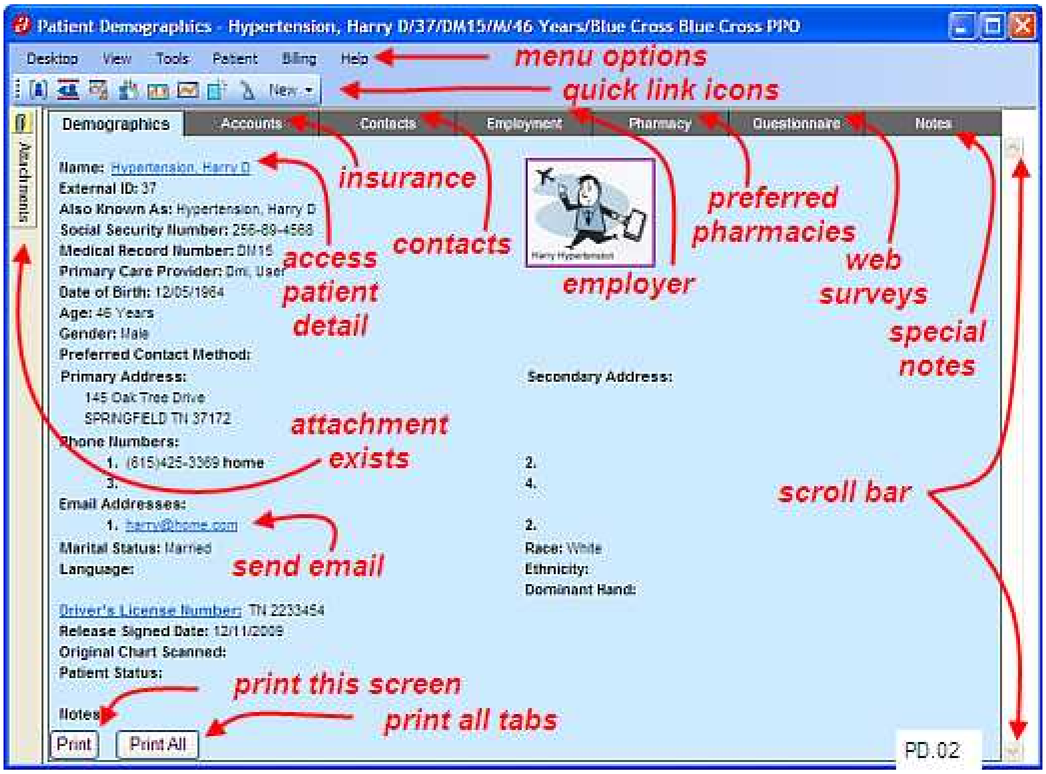
allows you to create a new appointment, note, superbill, message, tracking event, remark or referral for this patient. Visit note can also be started from the Desktop by clicking on or .

Patient Demographics Tabs

Demographic information includes patient information, insurance policies, emergency contact information, employment details, pharmacy information, web-based questionnaires and additional notes.

The default display is the patient **Demographics** information. This includes any patient detail information recorded in the **Patient** window *(PD.02)*.

The Print button prints this window; the Print All button prints this and all subsequent windows accessed from this window.



- Click on the patient name hyperlink (underlined) to access the **Modify Patient** window and update demographic detail for this patient.

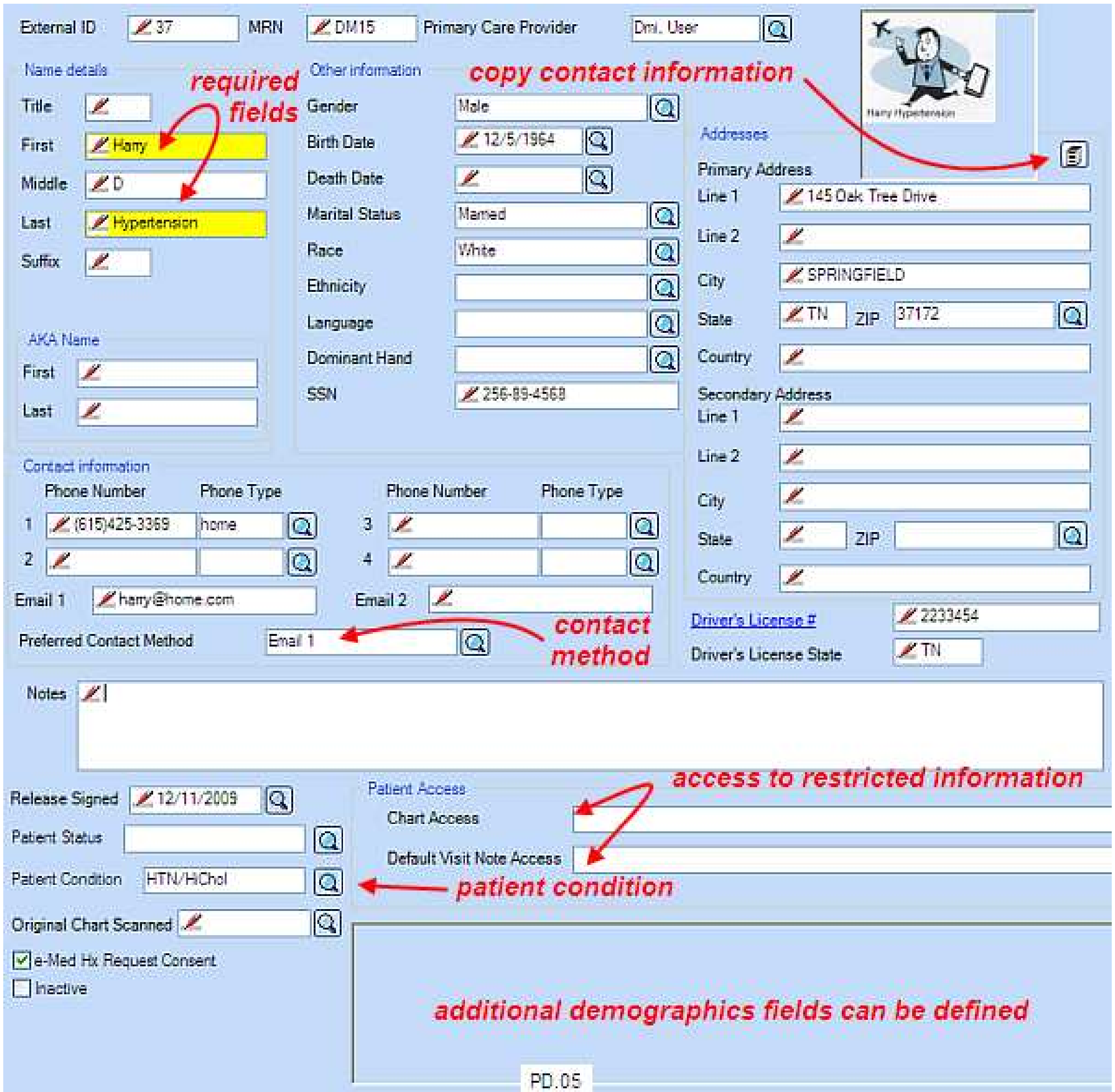
Demographics

The Modify Patient window allows you to make changes to an existing patient record. First and Last name are required fields. Additional fields can be designated as required. This is an option to provide additional flexibility and customization for the facility.

The Department of Health and Human Services (HHS) requires that the following fields be recorded for Medicare and Medicaid patients in order for providers to qualify for meaningful use reimbursement: Preferred Language, Gender, Race, Ethnicity, Date of Birth.

The system checks social security number, driver's license number, patient first and last name, and date of birth to do a duplicate name check. If any of these have already been recorded in the system, a warning message displays. The message can be dismissed which would allow you to proceed with registering this patient *(PD.05)*.

Note: To designate additional required fields, from the Desktop access Tools, Required Fields. Demographics, Patient.



Note: accesses a list of options. These lists can include all of the items available, the most frequently used or the most recently used items. Most lists in this class contain the most frequently used items. To view all items, click on Search *at the bottom of the window.*

The **External ID** field is the account number for this patient.

The **MRN** field is the chart number for this patient.

The **Primary Care Provider** field is used to associate a provider with this patient.

The **Name details** section of this window is used to provide name and title information for his patient. There is also a section for **AKA Name** which is an available search item in the Patient Find window.

The **Other information** section is used to identify information such as gender, DOB, death date, marital status, race, ethnicity, language, dominant hand, and social security number. When race or ethnicity information is not available or provided, use the option *Not Provided* in order to fulfill meaningful use requirements.

The **Primary Address** section is used to record primary and secondary address information.

The  icon next to the patient photo is used to copy contact information for this patient if it is the same as a person already recorded in the system.

The **Contact Information** section is used to record phone numbers and phone number types as well as email addresses. Whenever a phone number is entered, an associated type is required. A preferred contact method can be indicated.

Note: When a patient phone number is changed here, the system checks the phone number on appointments for the current or any future date. If the two phone numbers are the same, the phone number in the appointment is updated. If the two numbers are different, the appointment phone number remains unchanged.

The **Driver's License #** field is available to record driver's license information. The hyperlink allows you to scan the license which scans an image automatically and records information from the license. The scanning functionality is optional.

The **Notes** field is available to record notes about this patient.

The **Release Signed** is used to record the date the patient signed the Release of Medical Information form. The information in this field is used to complete Box 12 of the CMS 1500 form.

The **Patient Status** field is used to record a user status for this patient. User status codes are user defined but could be used to indicate an inactive or deceased patient.

The **Patient Condition** field is used to identify a medical condition for this patient. Conditions are user defined and can be color coded. The conditions display in the Patient Find window and the Patient ID in the Patient Find window will display in the color associated with that condition.

The **e-Med Hx Request Consent** checkbox is used to indicate whether or not you have permission from the patient to download medication history. HIPAA requires you have permission before accessing this information for a patient.

The **Inactive** checkbox is used to indicate this is an inactive patient.

The **Patient Access** section is used to record information related to restricting access to a patient's chart. Access to the entire patient chart can be restricted or just access to visit notes. Any visit notes created before restricting access will still be accessible.

The **Chart Access** field is used to identify the users or user groups who can access this patient's chart. When this field is completed, only the users or groups identified can access the patient's chart.

The **Default Visit Note Access** field is used to identify the users or user groups who can access this patient's visit notes. When this field is completed, only the users or groups identified can access the patient's visit notes.

An area is available for additional fields if necessary. Custom Demographics fields are an administrative function and are not covered in this class.

□ In the **Ethnicity** field, enter ***Not Provided*** to satisfy meaningful use criteria.

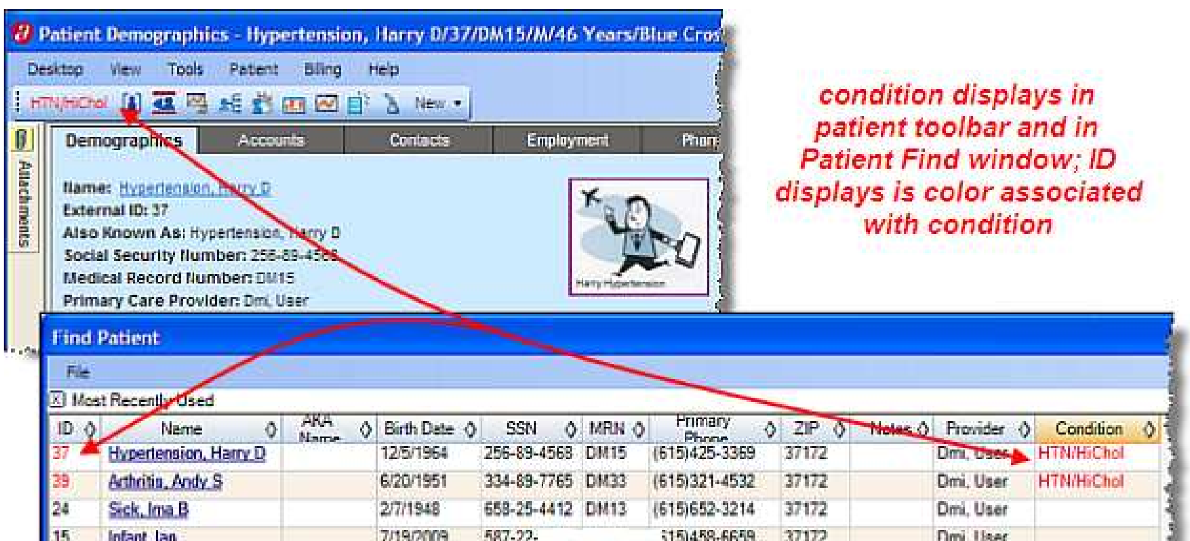
Note: To select an item, click on the hyperlink (underlined) or highlight the item and click on OK.

□ In the **Language** field, enter ***English*** to satisfy meaningful use criteria.

□ In the **Preferred Contact Method** field, click on the associated [search icon] to search for available options; then select ***Email 1*** to indicate the patient prefers to be contacted at his email address.

□ In the **Patient Condition** field, enter ***HTN/HiChol*** to indicate the patient has been diagnosed with hypertension and has high cholesterol.

□ Click on OK to save these changes. Note the new patient condition displays in red in the patient toolbar *(EPD.01)*.



EPD.01

To print this window, click on Print. To print all of this patient's demographic information, click on Print All.

Accounts

The patient's account window is used to add insurance information as well as billing responsibility information. The Main account is typically associated with the patient's personal insurance. This could include a primary and any secondary or tertiary insurance. If the patient has Work Comp insurance, that would be set up as a separate account.

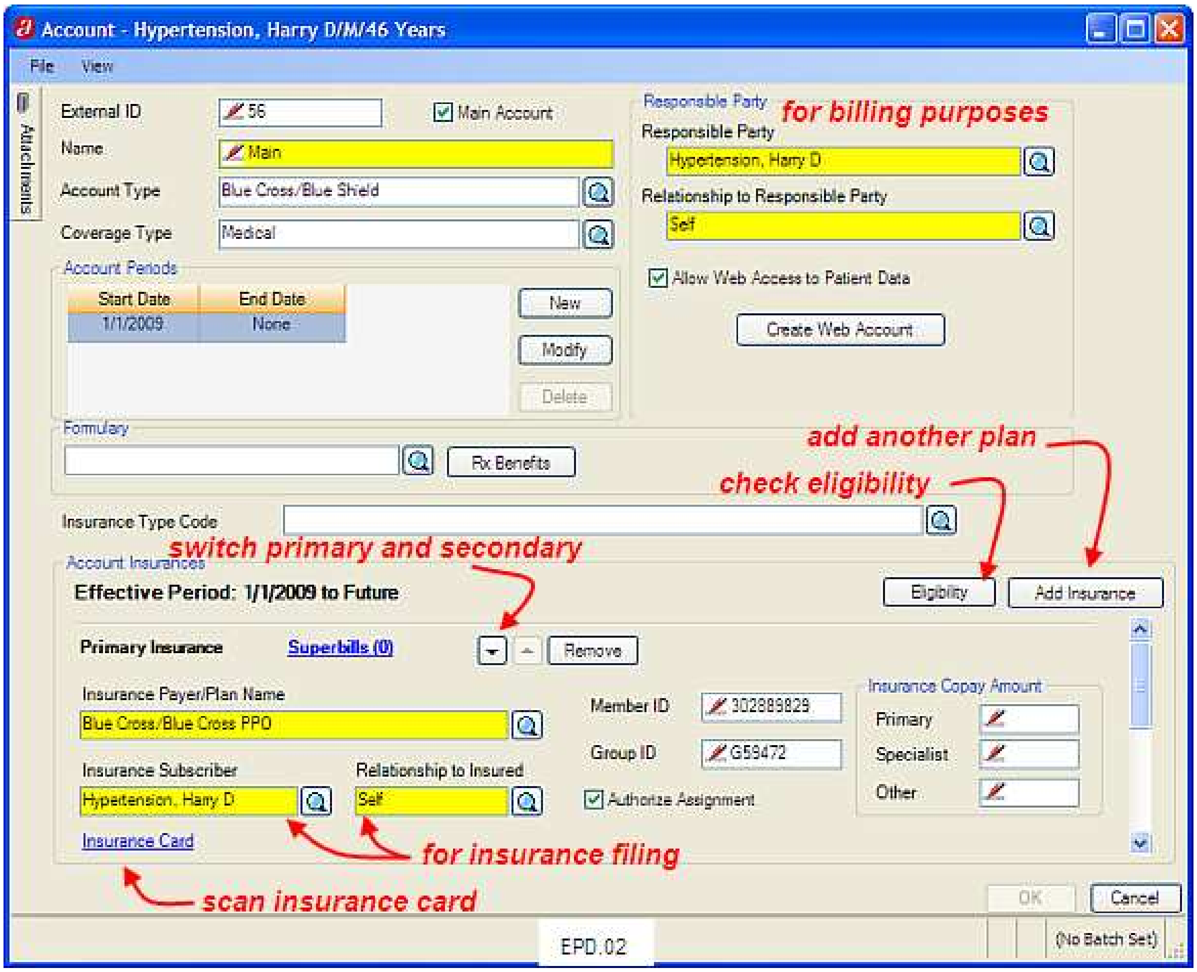
- Select ***Accounts*** to view the patient's insurance account information *(PD.06)*.

For each account assigned to the patient, summary information displays in the blue highlighted area of the window. This information includes total account balance, responsible party information, drug formulary information if recorded, account type (Blue Cross, Medicare, etc.), patient balance, responsible party balance (if this is a parent responsible for self and children), send statement indicator, statement due date, coverage type (medical, dental, etc.), payer credit balance, and last statement date.

The Add New Account button is used to add another type of information such as a work comp account.

A summary of each plan associated with the account displays in the white portions of the window.

- Click on the hyperlink ***Main*** (underlined) to access detailed information about this patient's main account information. This information can be updated, including the ability to add, modify or remove insurance from this account *(EPD.02)*.



Note: Visits can be assigned to the appropriate account when the appointment is scheduled.

The **External ID** is required. It can be system generated or user defined.

The **Name** is a required field. The system defaults the first account to the name *Main* but this name can be changed.

The **Coverage Type** field is used to identify the type of insurance for this account (medical, dental, etc.).

The **Main Account** checkbox also defaults for the first account.

The **Responsible Party** field is used to identify the responsible party for this account. When working with a Work Comp account, the responsible party would be the employer.

The **Relationship to Responsible Party** field indicates the patient's relationship to the responsible party for this account. When working with a Work Comp account, the relationship would be the employee.

The **Allow Web Access to Patient Data** field is used to allow the responsible party to access account information through the patient portal.

The Create Web Account button is used to create a user name and password for the responsible party.

The **Account Periods** section is used to indicate effective dates for this account. A new account period is added when account information changes. And End Date is not required. When a new account period is entered, an end date is assigned to the previous period.

The **Formulary** section is used to identify the drug formulary used for this account. The Rx Benefits button is used to view prescription benefits information for this account.

The **Insurance Type** field is only used when Medicare is a secondary plan on this account. If appropriate, select the code that best describes the reason Medicare is secondary.

The **Account Insurances** section is used to add insurance policies to this account. The first plan added is considered the primary plan. To move a plan from primary to secondary, click on  or  to change the order of the policies.

The **Superbills** hyperlink allows you to access the Track Superbills window to view all superbills associated with the patient's account and insurance plan.

The **Insurance Payer/Plan Name** field displays the payer and plan name for this plan.

The **Insurance Subscriber** field is used to indicate the name of the subscriber for this plan. This can be a person or a corporation.

The **Relationship to Insured** field is used to indicate the relationship of the patient to the insured subscriber.

The **Member ID** field is used to indicate the patient's member ID for this insurance plan.

The **Group ID** field is used to indicate the patient's group ID for this insurance plan.

The **Authorize Assignment** checkbox is used to indicate whether or not the patient has authorized the payer to send payment directly to the provider.

The **Insurance Copay Amount** section is used to record any copays associated with this insurance plan.

The Eligibility button accesses the patient's eligibility information. The Add Insurance button allows you to add another plan to this account. The scroll bar allows you to view additional plans on this account.

- In the **Account Periods** section, click on New to add a new account period since Harry's Blue Cross Group and ID number have changed.

- In the **New Account Period** window, click on the associated with the In the **Effective Date** field and assume the first of this month, then click on OK *(EPI.03)*.

- In the **Confirm Copying Information** window, click on Yes to copy the plan information. Changes can be made to the copied information.

The previous account period now has an end date and a new account period displays. This allows the system to access the old account period information (in this case Group and ID numbers) for any charges still pending or anything that may need to be refiled, but the new details are available for charges posted from this point on.

- Use the following information to complete the changes to this plan:

Member ID:	***ZEB223223123***
Group ID:	***N50038***

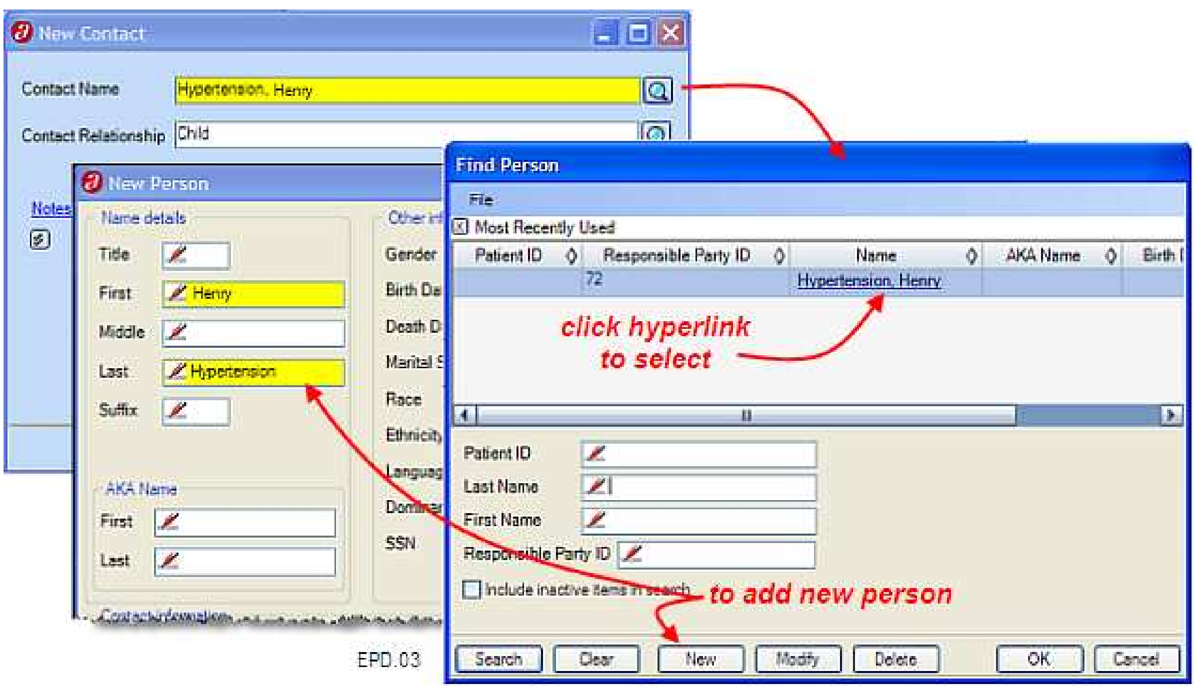
- Click on OK to save these changes.

To print this window, click on Print. To print all of this patient's demographic information, click on Print All.

Contacts

The patient's contact information is used to record any contacts for this patient. You have the ability to indicate if this person is an emergency contact and whether or not the contact can make medical decisions.

- Select ***Contacts*** to view the patient's contact information *(PD.07)*.
- Click on the white space for a ***Hazel Hypertension*** to update that contact's information.
- Check the boxes for ***Emergency Contact*** and ***Authorized to make medical decisions***.
- Click on OK to save these changes.
- Click on Add to add another contact for this patient.
- In the **Contact Name** field, click on to search for ***Henry Hypertension*** *(EPD.03)*.
- Since he is not in the Person file, click on New to add him.
- In the **First** field of the **New Person** window, type ***Henry***.
- In the **Last** field of the **New Person** window, type ***Hypertension***. Add any more information you would like and then click on OK to save this information.



EPD.03

- From the **Find Person** window, click on the hyperlink for Henry or highlight his name and click on OK to add him as the new contact for this patient.
- In the **Contact Relationship** field of the **New Contact** window, click on , then search for and select ***Child***.

Note: If you know the entry for the field, you can type the first few letters and Tab and your entry will be assumed. If multiple entries are available the find window will display in order for you to select from the available options.

- Check the box to indicate this person is ***Authorized to make medical decisions***.
- Click on OK to save this new contact information.

To delete this contact, click on ×. To print this window, click on Print. To print all of this patient's demographic information, click on Print All.

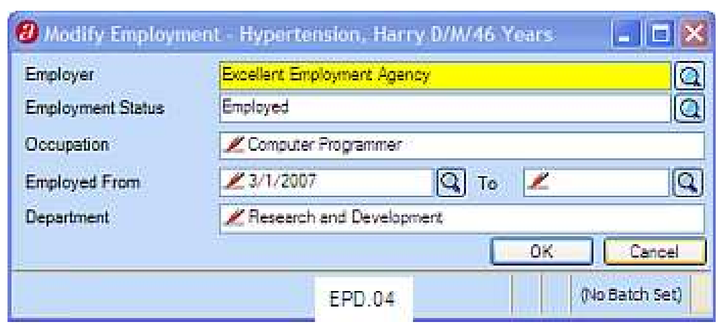
Employment

Employment information can be recorded for patients. The employment information may be recorded on insurance claims and is particularly important for Work Comp claims.

- Select ***Employment*** to view the patient's employment information *(PD.08)*.

To update employment information, click on the white space for the employer to be updated.

- Click on the white space to edit this employment information. The **Modify Employment** window displays.
- In the **Department** field, type ***Research and Development***.
- Click on OK to save this information.



To add a new employer, click Add. To delete this employer, click on ×. To print this window, click on Print. To print all of this patient's demographic information, click on Print All.

Pharmacy

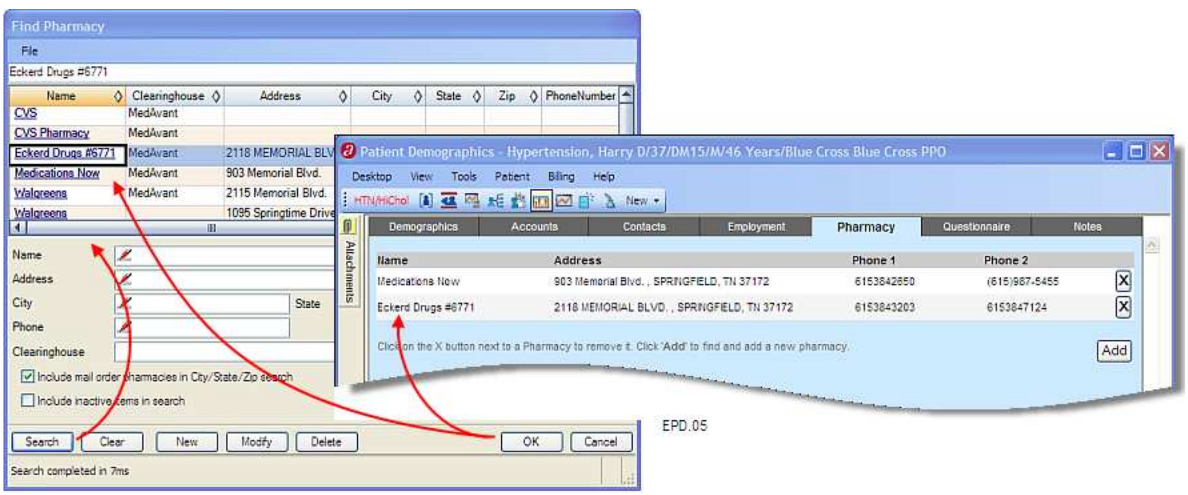
Pharmacies are associated with patients and can be accessed from the patient visit. When used with electronic prescribing, the pharmacy may be associated with a Master Pharmacy name.

PD.09

- Select ***Pharmacy*** to view the patient's pharmacy information *(PD.09)*.

To add a new pharmacy, click on Add. To delete a pharmacy, click on X.

- Click on the X associated with the ***Walgreens*** pharmacy to delete it from this patient's list.
- Click on Add To access the **Find Pharmacy** window.
- Click on Search to view available pharmacies *(EPD.05)*.

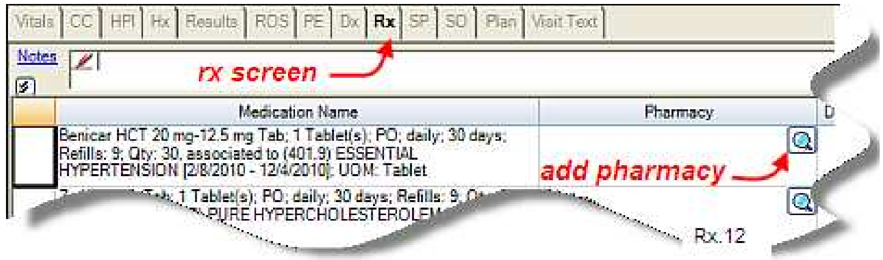


EPD.05

- Highlight ***Eckerd Drugs #6671*** and click on OK to add this pharmacy to the patient's list.

To print this window, click on Print. To print all of this patient's demographic information, click on Print All.

*Note: A pharmacy can also be added to an chart from the **Rx** tab. Click on the icon associated with the **Pharmacy** field and search for a pharmacy (Rx.12).*



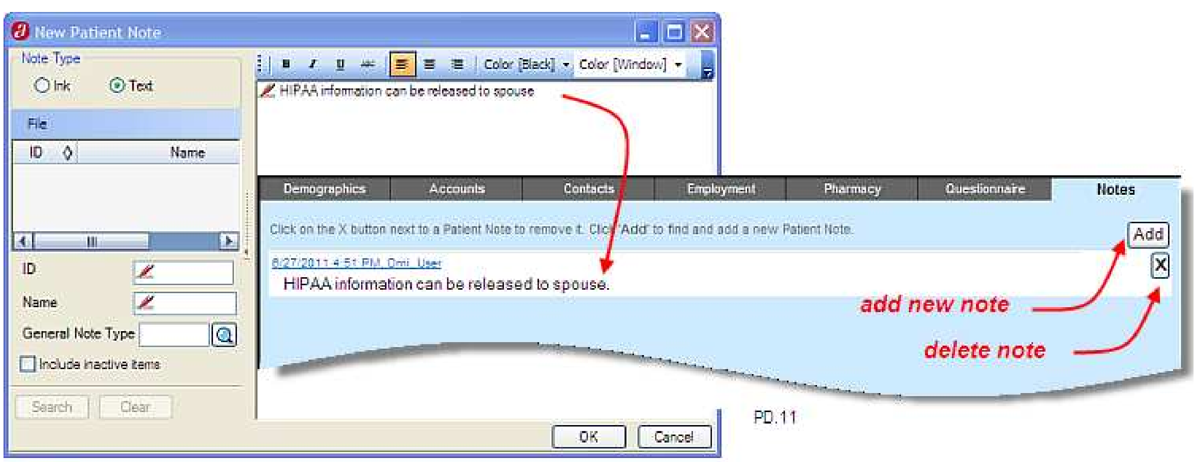
Questionnaire

Patient demographic and history questionnaires available through the portal display in this window. Web accounts can be created for patients using the Create Web Account button.

- Select ***Questionnaire*** to view the patient's survey window. The system has access to web-based surveys accessible by your patients. No survey information is available for this patient at this time *(PD.10)*.

Notes

Notes can include any general notes pertaining to this patient including payment terms, the release of medical information or any other special arrangements for the patient. When using a tablet computer, the ink option is available to enter hand-written notes. General note types can be created as well.



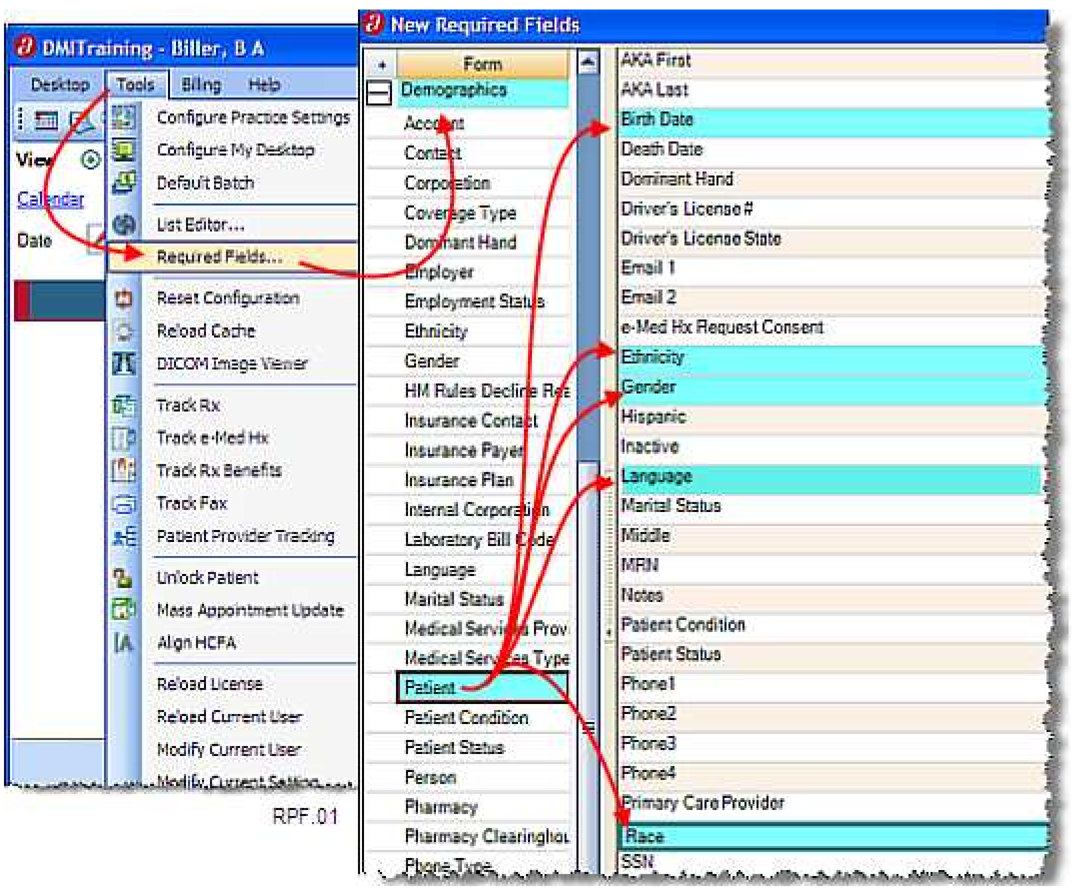
- Select ***Notes*** to access notes related to this patient *(PD.11)*.
- Click on the Add to add a note for this patient. In the **New Patient Note** window, enter the following: ***HIPAA information can be released to spouse.***
- Click on OK to save this note.

To delete this note, click on [X]. To print this window, click on [Print]. To print all of this patient's demographic information, click on [Print All].

User Defined Required Fields

Typically a practice has certain demographic information they require as a part of registration. The Department of Health and Human Services (HHS) requires that the following fields be recorded for Medicare and Medicaid patients in order for providers to qualify for meaningful use reimbursement: Preferred Language, Gender, Race, Ethnicity, and Date of Birth. Although the system allows you to make almost anything a required field, but for class purposes, we are going to only mark the HHS meaningful use fields as required.

- From the **Desktop**, click on [Tools], [Required Fields...]. The **New Required Fields** window displays *(RPF.01)*.



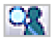
RPF.01

- Click on ***Demographics*** and then ***Patient*** to select fields related to the Patient Demographics window.

- From the **Patient** list, select the following to be required fields: ***Birth Date, Ethnicity, Gender, Language, Race***.

- Click on [OK] to save these as required fields. These fields will now be required when adding or editing patient information.

Exercises: Add Patients and Plans

- Click on  and click on New to add the following new patients. Always search for the patient first to be sure he/she has not already been added.

First:	***Harriet***
Middle:	***C***
Last:	***Hypertension***
Primary Care Provider:	***Provider, PM***
Gender:	***Female***
Birth Date:	***01/04/1997***
Race:	***White***
Ethnicity:	***Not Hispanic or Latino***
Language:	***English***
SSN:	***332-09-0934***

- Click on  to copy an address and phone number from ***Harry Hypertension***.

- Use the following information to complete the **New Patient** window for this patient:

Phone Number 2:	***615.442.4434, cell***
Preferred Contact Method:	***Phone1***

- Click on OK to save this demographic information.

- Click on ***Accounts*** and click on the ***Main*** hyperlink to add insurance for Harriet. Use the following information to add her insurance:

Account Type:	***Blue Cross/Blue Shield***
Coverage Type:	***Medical***
Responsible Party	***Harry D. Hypertension***
Relationship to Responsible Party:	***Child***
Account Periods Start Date:	***1st of this month***

- Click on Add Insurance and use the following information to complete the primary plan details:

Insurance Payer/Plan Name:	***Blue Cross/Blue Cross PPO***
Insurance Subscriber:	***Harry Hypertension*** *(assumed)*
Relationship to Insured:	***Child*** *(assumed)*
Member ID:	***ZEB223223123***
Group ID:	***N50038***

- Click on Add Insurance again use the following information to complete the secondary plan details (scroll down to access blank fields):

Insurance Subscriber:	***Hazel Hypertension***
Relationship to Insured:	***Child*** *(assumed)*
Insurance Payer/Plan Name:	***Aetna***
Member ID:	***123456789***

- Click on OK to save this insurance information.

□ Use the following information to add Althea Annualexam as a new patient.

First:	***Althea***
Middle:	***S***
Last:	***Annualexam***
Primary Care Provider:	***Provider, PM***
Gender:	***Female***
Birth Date:	***02/12/1966***
Marital Status:	***Married***
Race:	***Black or African American***
Ethnicity:	***Not Hispanic or Latino***
Language:	***English***
SSN:	***398-22-0124***

□ Click on  to copy an address from ***Atticus Annualexam***.

□ Use the following information to complete the **New Patient** window for this patient:

Phone Number 1:	***615.762.4224, cell***
Preferred Contact Method:	***Phone1***
Email 1:	***annualexam@home.com***

□ Click on 

to save this demographic information.

□ Click on ***Accounts*** and click on the ***Main*** hyperlink to add insurance for Harriet. Use the following information to add her insurance:

Account Type:	***Blue Cross/Blue Shield***
Coverage Type:	***Medical***
Responsible Party	***Althea Annualexam***
Relationship to Responsible Party:	***Self***
Account Periods Start Date:	***1st of this month***

□ Click on 

and use the following information to complete the primary plan details:

Insurance Payer/Plan Name:	***Blue Cross/Blue Cross PPO***
Insurance Subscriber:	***Atticus Annualexam***
Relationship to Insured:	***Spouse***
Member ID:	***ADE388994456***
Group ID:	***D38444***

□ Click on 

to save this insurance information.

□ Click on ***Contacts*** and add ***Atticus Annualexam*** as her emergency contact with permission to make medical decisions for her.

□ Click on 

to save this contact information.

Exercises: Add/Edit Plans

- Access the **Patient Demographics** window for ***Atticus Annualexam*** and click on ***Accounts*** in order to add a personal insurance policy to his Main account:

*Note: Click on , , to quickly return to **Find Patient** window.*

Account Type:	***Blue Cross/Blue Shield***
Coverage Type:	***Medical***
Responsible Party	***Atticus Annualexam***
Relationship to Responsible Party:	***Self***
Account Periods Start Date:	***1st of this month***

- Click on and use the following information to complete the primary plan details:

Insurance Payer/Plan Name:	***Blue Cross/Blue Cross PPO***
Insurance Subscriber:	***Atticus Annualexam*** *(assumed)*
Relationship to Insured:	***Self*** *(assumed)*
Member ID:	***ADE388994456***
Group ID:	***D38444***

- Click on to save this insurance information.
- Access the **Patient Demographics** window for ***Sally Strepthroat*** and click on ***Accounts*** in order to update her personal insurance policies on her Main account:
- In the **Account Periods** section of the **Account** window, click on to add a new account period since insurance information is changing for this patient.
- Make the new account period effective the first of this month and copy the insurance information from the previous period.
- To make ***Aetna PPO*** her secondary insurance coverage, click on the associated . This will move the Aetna policy to secondary and Blue Cross to primary.
- Click on to save this insurance information.

Exercises: Add Work Comp Account

- Access the **Patient Demographics** window for the patient with the phone number, ***615.554.2213***. Click on ***Accounts*** in order to add a new account to his patient record.
- Click on to add the Work Comp account.

Note: The Main account is used to record personal health insurance. A second account is used for worker's compensation or possibly for insurance covering an automobile accident.

Name:	***Work Comp***
Account Type:	***Work Comp***

- Click on the associated with the **Responsible Party** field and click on the radiobutton for ***Corporation*** and search for employers.

- Highlight ***Excellent Employment Agency*** and click on OK or click on the hyperlink to select this employer. A prompt displays asking if you want to use the information already recorded for this employer.

- Click on Yes to use the effective information for this employer.

Responsible Party	***Excellent Employment Agency***
Relationship to Responsible Party:	***Employee*** *(assumed)*
Account Periods Start Date:	***1st of this month***
Insurance Payer/Plan Name:	***Work Comp/Hartford Ins*** *(assumed)*
Member ID:	***898562234***
Insurance Subscriber:	***Bobby Bloodpressure*** *(assumed)*
Relationship to Insured:	***Employee*** *(assumed)*

- Click on OK to save this insurance information.

Section Two Review Exercises

1. From Harry Hypertension's **Patient Demographics** window, print his patient information to a PDF file named: ***Section 2 HHypertension Patient Info***.

2. From Harriet Hypertension's Patient Demographics window, print he patient information to a PDF file named: ***Section 2 HCHypertension Patient Info***.

3. From Harriet Hypertension's Patient Demographics window, print her insurance information to a PDF file named ***Section 2 HCHypertension Ins Info***.

4. From Althea Annualexam's Patient Demographics window, print he patient information to a PDF file named: ***Section 2 ASAnnualexam Patient Info***.

5. From Althea Annualexam's Patient Demographics window, print her insurance information to a PDF file named ***Section 2 ASAnnualexam Ins Info***.

6. From Sally Strepthroat's Patient Demographics window, print her insurance information to a PDF file named ***Section 2 SStrepthroat Ins Info***.

7. From Atticus Annualexam's Patient Demographics window, print his insurance information to a PDF file named ***Section 2 AMAnnualexam Ins Info***.

8. From Bobby Bloodpressure's Patient Demographics window, print his insurance detail to a PDF file named: ***Section 2 BBloodpressure Insurance***.

9. Please email the PDF files to your instructor with a subject line: ***Section 2 Review Exercises***.

This concludes Section Twelve of this class

Please see next page for Instructor's Notes

Instructor's Notes

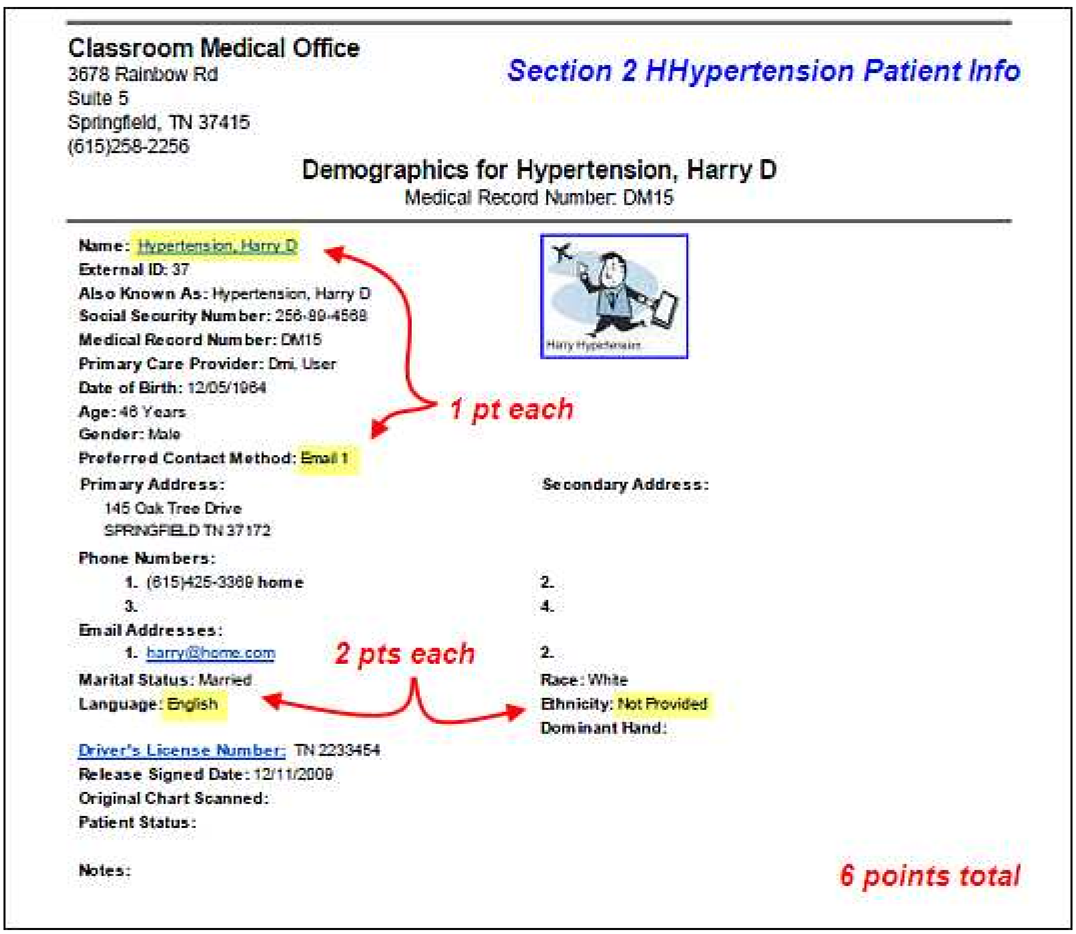
Section Two Content Overview

This section provides basic information about accessing, adding and updating the patient demographics windows. Recording patient data and insurance information is critical for successful claims transmission and for accurate recordkeeping. Therefore several exercises have been provided to build familiarity and confidence in this area. Extra points are assigned to completed meaningful use fields.

Points assigned to these exercises are arbitrary. Use your discretion when grading the student assignments. Additional information may appear in the files submitted for these exercises. Because of space restrictions, only pertinent information is displayed in the answer guides.

Section Two Review Exercises

1. From Harry Hypertension's **Patient Demographics** window, print his patient information to a PDF file named: ***Section 2 HHypertension Patient Info***. *(fulfills Obj 2 update demographics for existing patient)*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Section 2 HHypertension Patient Info

Demographics for Hypertension, Harry D
Medical Record Number: DM15

Name: Hypertension, Harry D
External ID: 37
Also Known As: Hypertension, Harry D
Social Security Number: 256-89-4568
Medical Record Number: DM15
Primary Care Provider: Dmi, User
Date of Birth: 12/05/1964
Age: 46 Years
Gender: Male
Preferred Contact Method: Email 1

1 pt each

Primary Address:
145 Oak Tree Drive
SPRINGFIELD TN 37172

Secondary Address:

Phone Numbers:
1. (615)425-3369 home
2.
3.
4.

Email Addresses:
1. harry@home.com
2.

2 pts each

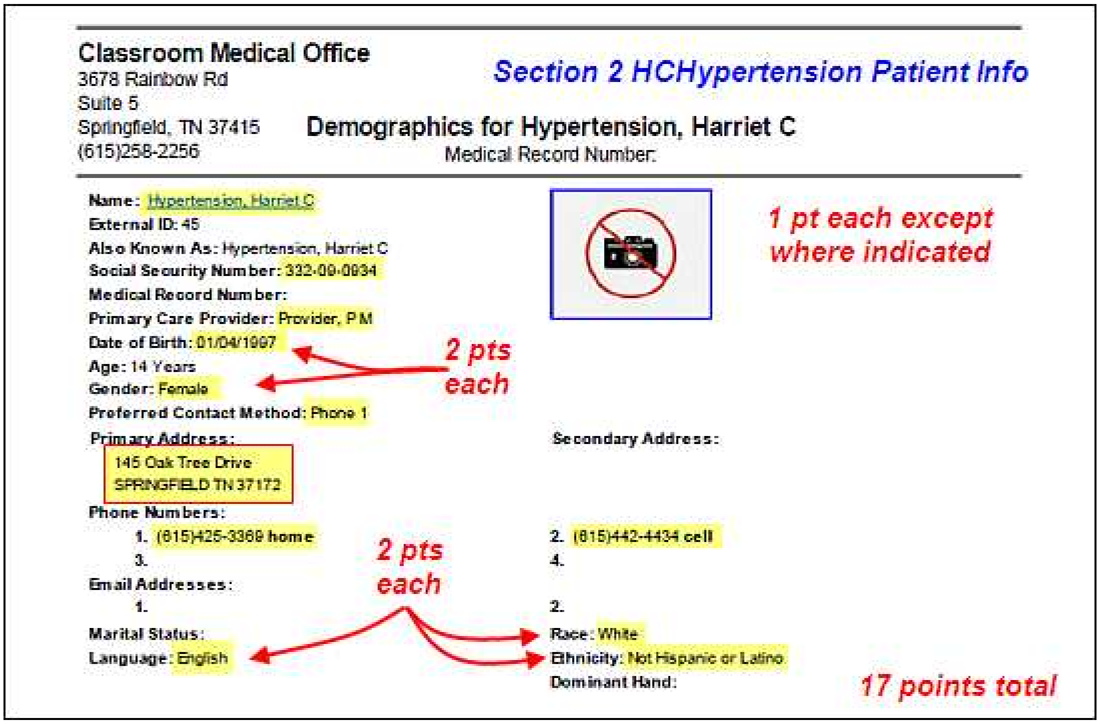
Marital Status: Married
Language: English
Race: White
Ethnicity: Not Provided
Dominant Hand:

Driver's License Number: TN 2233454
Release Signed Date: 12/11/2009
Original Chart Scanned:
Patient Status:

Notes:

6 points total

2. From Harriet Hypertension's Patient Demographics window, print her patient information to a PDF file named: ***Section 2 HCHypertension Patient Info***. *(fulfills Obj 3 add new patient)*



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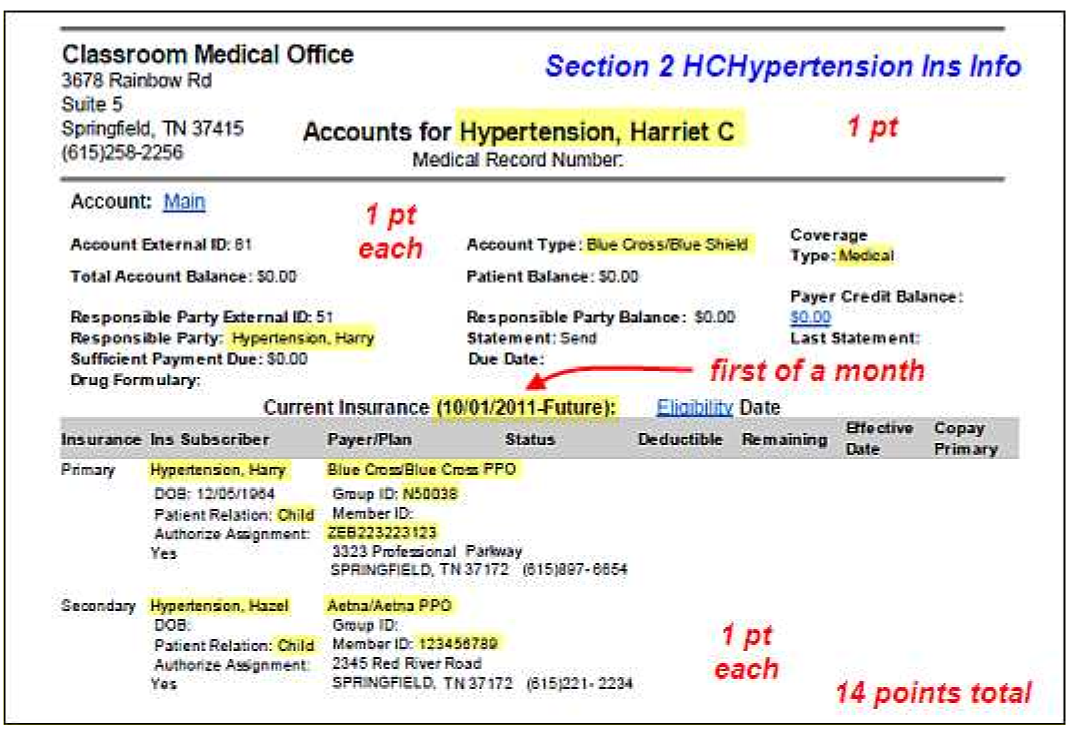
Section 2 HCHypertension Patient Info

Demographics for Hypertension, Harriet C
Medical Record Number:

Name: Hypertension, Harriet C
External ID: 45
Also Known As: Hypertension, Harriet C
Social Security Number: 332-09-0934
Medical Record Number:
Primary Care Provider: Provider, P M
Date of Birth: 01/04/1997
Age: 14 Years
Gender: Female
Preferred Contact Method: Phone 1
Primary Address:
145 Oak Tree Drive
SPRINGFIELD TN 37172
Secondary Address:
Phone Numbers:
1. (615)425-3369 home
2. (615)442-4434 cell
3.
4.
Email Addresses:
1.
2.
Marital Status:
Language: English
Race: White
Ethnicity: Not Hispanic or Latino
Dominant Hand:

1 pt each except where indicated
2 pts each
2 pts each
17 points total

3. From Harriet Hypertension's Patient Demographics window, print her insurance information to a PDF file named ***Section 2 HCHypertension Ins Info***. *(fulfills Obj 3 update insurance for a new patient)*



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Section 2 HCHypertension Ins Info

Accounts for Hypertension, Harriet C
Medical Record Number:

1 pt

Account: Main
Account External ID: 61
Total Account Balance: $0.00
Account Type: Blue Cross/Blue Shield
Patient Balance: $0.00
Coverage Type: Medical
Payer Credit Balance: $0.00
Responsible Party External ID: 51
Responsible Party: Hypertension, Harry
Sufficient Payment Due: $0.00
Drug Formulary:
Responsible Party Balance: $0.00
Statement: Send
Due Date:
Last Statement:

1 pt each
first of a month

Current Insurance (10/01/2011-Future): Eligibility Date

Insurance	Ins Subscriber	Payer/Plan	Status	Deductible	Remaining	Effective Date	Copay Primary
Primary	Hypertension, Harry DOB: 12/05/1964 Patient Relation: Child Authorize Assignment: Yes	Blue Cross/Blue Cross PPO Group ID: N50038 Member ID: ZEB223223123 3323 Professional Parkway SPRINGFIELD, TN 37172 (615)897-6654					
Secondary	Hypertension, Hazel DOB: Patient Relation: Child Authorize Assignment: Yes	Aetna/Aetna PPO Group ID: Member ID: 123456789 2345 Red River Road SPRINGFIELD, TN 37172 (615)221-2234					

1 pt each
14 points total

4. From Althea Annualexam's Patient Demographics window, print her patient information to a PDF file named: ***Section 2 ASAnnualexam Patient Info***. *(fulfills Obj 3 add new patient)*

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Section 2 ASAnnualexam Patient Info

Demographics for Annalexam, Althea S
Medical Record Number:

1 pt each except where indicated

Name: Annalexam, Althea S
External ID: 46
Also Known As: Annalexam, Althea S
Social Security Number: 398-22-0124
Medical Record Number:
Primary Care Provider: Provider, P M
Date of Birth: 02/12/1966
Age: 45 Years
Gender: Female

2 pts each

Preferred Contact Method: Phone 1
Primary Address:
3443 Blue Sky Circle
Springfield TN 37172
Secondary Address:
Phone Numbers:
1. (615)762-4224 cell
2.
3.
4.

Email Addresses:
1. annualexam@home.com
2.

2 pts each

Marital Status: Married
Language: English
Race: Black or African American
Ethnicity: Not Hispanic or Latino
Dominant Hand:
Driver's License Number:
Release Signed Date:
Original Chart Scanned:
Patient Status:

18 points total

5. From Althea Annualexam's Patient Demographics window, print her insurance information to a PDF file named ***Section 2 ASAnnualexam Ins Info***. *(fulfills Obj 3 update insurance for a new patient)*

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Section 2 ASAnnualexam Ins Info

Accounts for Annalexam, Althea S ***1 pt***
Medical Record Number:

Account: Main ***1 pt***

Account External ID: 82
Total Account Balance: $0.00
Account Type: Blue Cross/Blue Shield
Patient Balance: $0.00
Coverage Type: Medical
Responsible Party External ID: 74
Responsible Party: Annalexam, Althea
Sufficient Payment Due: $0.00
Drug Formulary:
Responsible Party Balance: $0.00
Statement: Send
Due Date: ***first of a month***
Payer Credit Balance: $0.00
Last Statement:

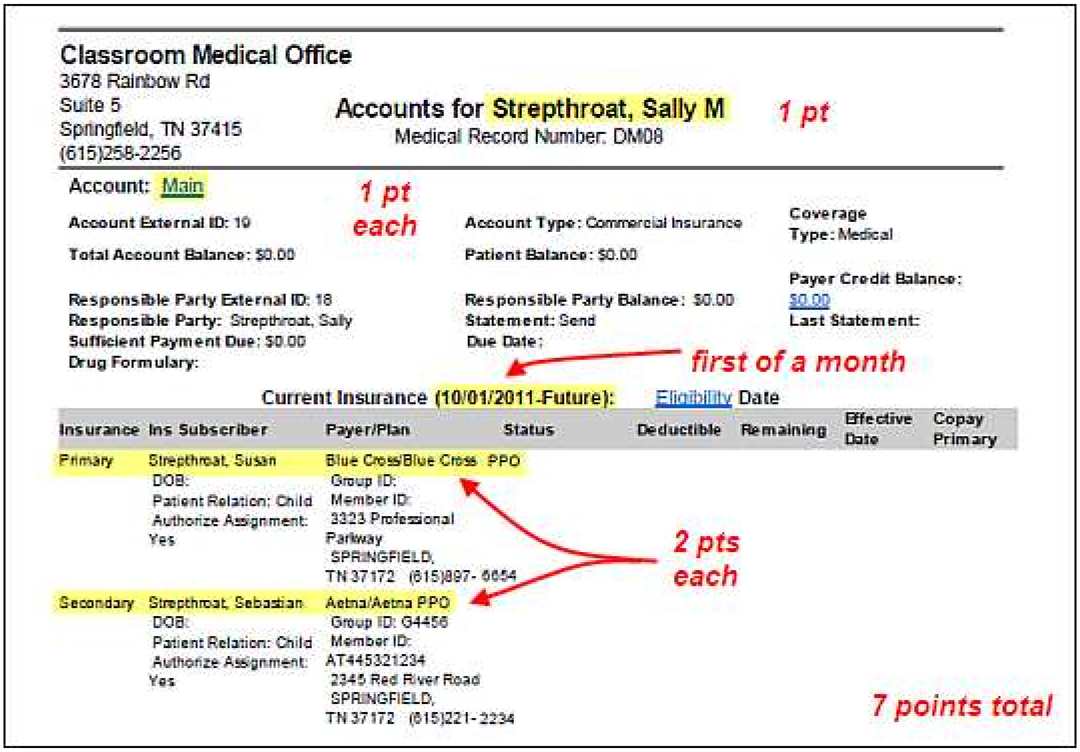
Current Insurance (10/01/2011-Future): Eligibility Date

Insurance	Ins Subscriber	Payer/Plan	Status	Deductible	Remaining	Effective Date	Copay Primary
Primary	Annualexam, Atticus DOB: 09/02/1952 Patient Relation: Spouse Authorize Assignment: Yes	Blue Cross/Blue Cross PPO Group ID: D38444 Member ID: ADE388994458 3323 Professional Parkway SPRINGFIELD, TN 37172 (615)897- 6854					

1 pt each

10 points total

6. From Sally Strepthroat's Patient Demographics window, print her insurance information to a PDF file named ***Section 2 SStrepthroat Ins Info***. *(fulfills Obj 4 update insurance for a existing patient)*



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Accounts for Strepthroat, Sally M — 1 pt
Medical Record Number: DM08

Account: Main — 1 pt each

Account External ID: 10
Total Account Balance: $0.00
Account Type: Commercial Insurance
Patient Balance: $0.00
Coverage Type: Medical
Payer Credit Balance: $0.00
Responsible Party External ID: 18
Responsible Party: Strepthroat, Sally
Sufficient Payment Due: $0.00
Drug Formulary:
Responsible Party Balance: $0.00
Statement: Send
Due Date: — first of a month
Last Statement:

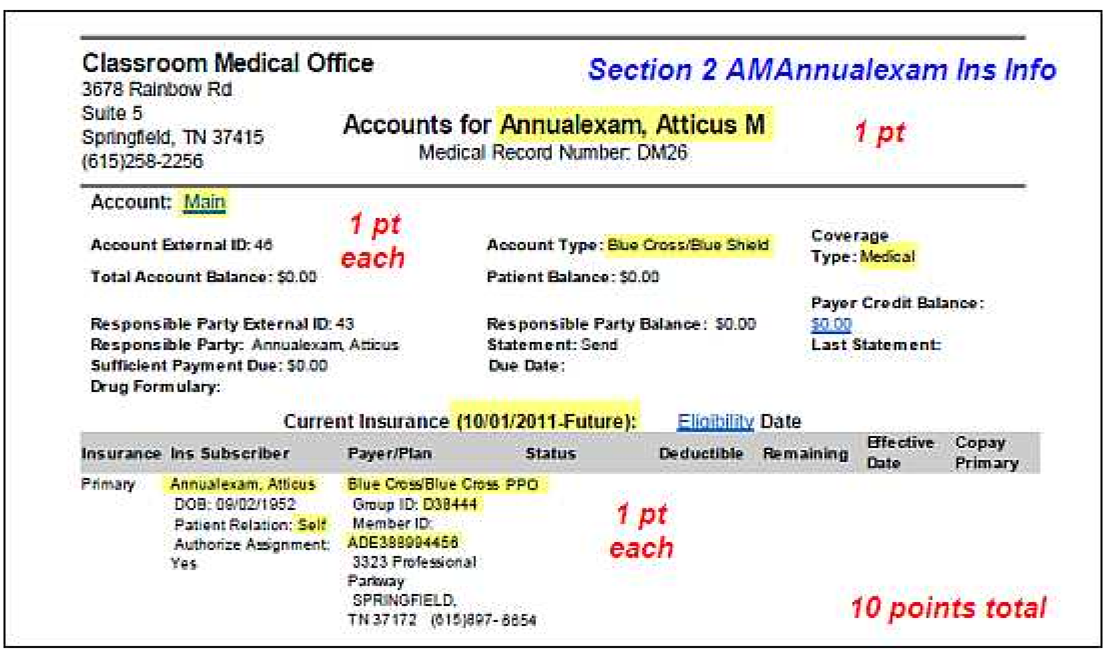
Current Insurance (10/01/2011-Future): Eligibility Date

Insurance	Ins Subscriber	Payer/Plan	Status	Deductible	Remaining	Effective Date	Copay Primary
Primary	Strepthroat, Susan DOB: Patient Relation: Child Authorize Assignment: Yes	Blue Cross/Blue Cross PPO Group ID: Member ID: 3323 Professional Parkway SPRINGFIELD, TN 37172 (615)897-6654					
Secondary	Strepthroat, Sebastian DOB: Patient Relation: Child Authorize Assignment: Yes	Aetna/Aetna PPO Group ID: G4456 Member ID: AT445321234 2345 Red River Road SPRINGFIELD, TN 37172 (615)221-2234					

2 pts each

7 points total

7. From Atticus Annualexam's Patient Demographics window, print his insurance information to a PDF file named ***Section 2 AMAnnualexam Ins Info***. *(fulfills Obj 4 update insurance for a existing patient)*



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Section 2 AMAnnualexam Ins Info

Accounts for Annualexam, Atticus M — 1 pt
Medical Record Number: DM26

Account: Main — 1 pt each

Account External ID: 46
Total Account Balance: $0.00
Account Type: Blue Cross/Blue Shield
Patient Balance: $0.00
Coverage Type: Medical
Payer Credit Balance: $0.00
Responsible Party External ID: 43
Responsible Party: Annualexam, Atticus
Sufficient Payment Due: $0.00
Drug Formulary:
Responsible Party Balance: $0.00
Statement: Send
Due Date:
Last Statement:

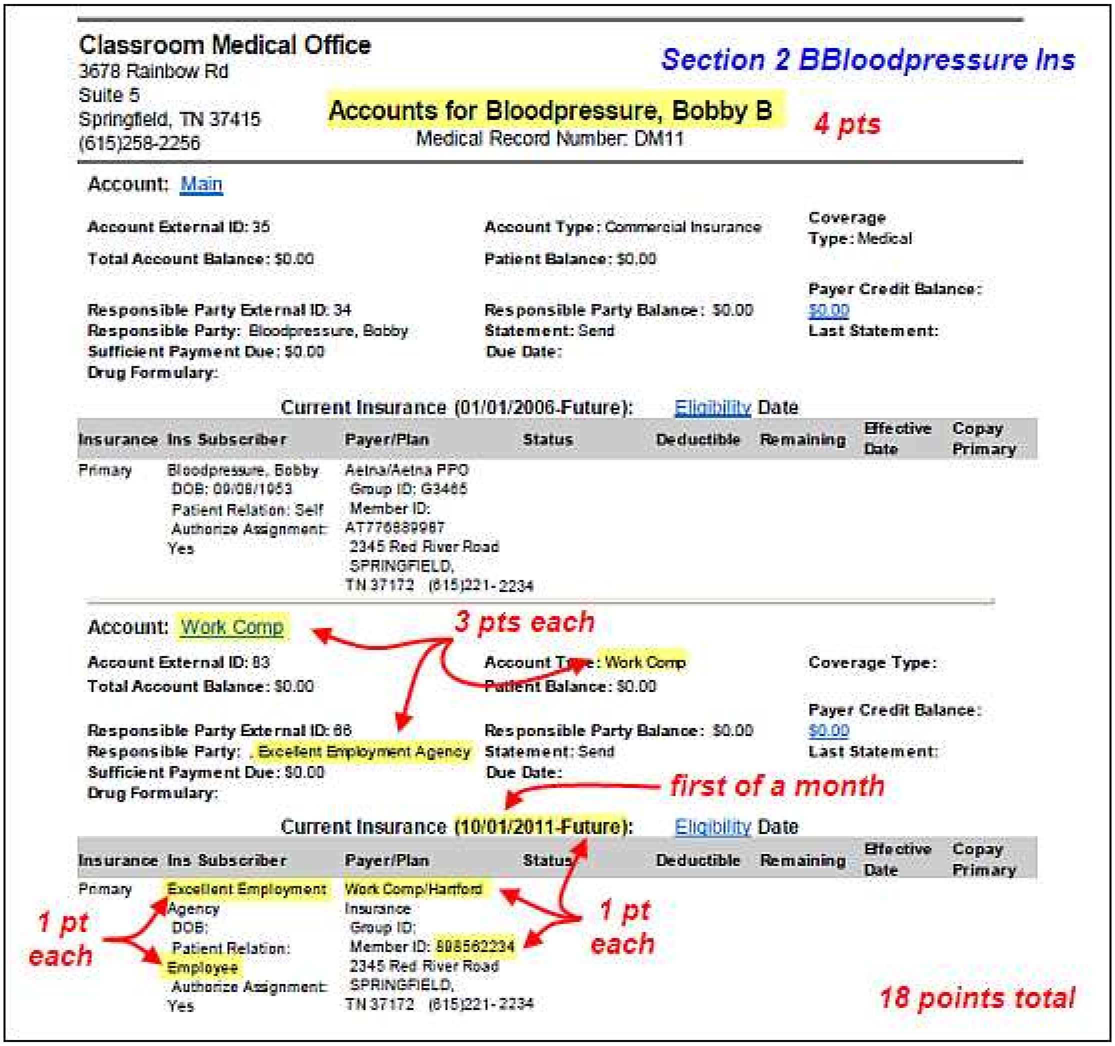
Current Insurance (10/01/2011-Future): Eligibility Date

Insurance	Ins Subscriber	Payer/Plan	Status	Deductible	Remaining	Effective Date	Copay Primary
Primary	Annualexam, Atticus DOB: 09/02/1952 Patient Relation: Self Authorize Assignment: Yes	Blue Cross/Blue Cross PPO Group ID: D38444 Member ID: ADE388994456 3323 Professional Parkway SPRINGFIELD, TN 37172 (615)897-6654					

1 pt each

10 points total

8. From Bobby Bloodpressure's Patient Demographics window, print his insurance detail to a PDF file named: ***Section 2 BBloodpressure Insurance****(fulfills Obj 1, search by phone # and Obj 5, add new account)*



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Section 2 BBloodpressure Ins

Accounts for Bloodpressure, Bobby B
Medical Record Number: DM11

4 pts

Account: Main

Account External ID: 35
Total Account Balance: $0.00
Account Type: Commercial Insurance
Patient Balance: $0.00
Coverage Type: Medical

Responsible Party External ID: 34
Responsible Party: Bloodpressure, Bobby
Sufficient Payment Due: $0.00
Drug Formulary:
Responsible Party Balance: $0.00
Statement: Send
Due Date:
Payer Credit Balance: $0.00
Last Statement:

Current Insurance (01/01/2006-Future): Eligibility Date

Insurance	Ins Subscriber	Payer/Plan	Status	Deductible	Remaining	Effective Date	Copay Primary
Primary	Bloodpressure, Bobby DOB: 09/08/1953 Patient Relation: Self Authorize Assignment: Yes	Aetna/Aetna PPO Group ID: G3465 Member ID: AT776889987 2345 Red River Road SPRINGFIELD, TN 37172 (615)221-2234					

Account: Work Comp

3 pts each

Account External ID: 83
Total Account Balance: $0.00
Account Type: Work Comp
Patient Balance: $0.00
Coverage Type:

Responsible Party External ID: 86
Responsible Party: , Excellent Employment Agency
Sufficient Payment Due: $0.00
Drug Formulary:
Responsible Party Balance: $0.00
Statement: Send
Due Date:
Payer Credit Balance: $0.00
Last Statement:

first of a month

Current Insurance (10/01/2011-Future): Eligibility Date

Insurance	Ins Subscriber	Payer/Plan	Status	Deductible	Remaining	Effective Date	Copay Primary
Primary	Excellent Employment Agency DOB: Patient Relation: Employee Authorize Assignment: Yes	Work Comp/Hartford Insurance Group ID: Member ID: 898562234 2345 Red River Road SPRINGFIELD, TN 37172 (615)221-2234					

1 pt each

1 pt each

18 points total

9. Please email the PDF files to your instructor with a subject line: ***Section 2 Review Exercises***.