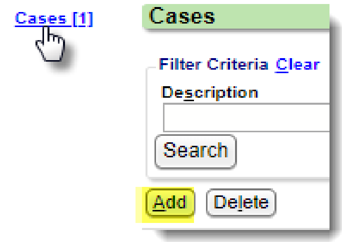
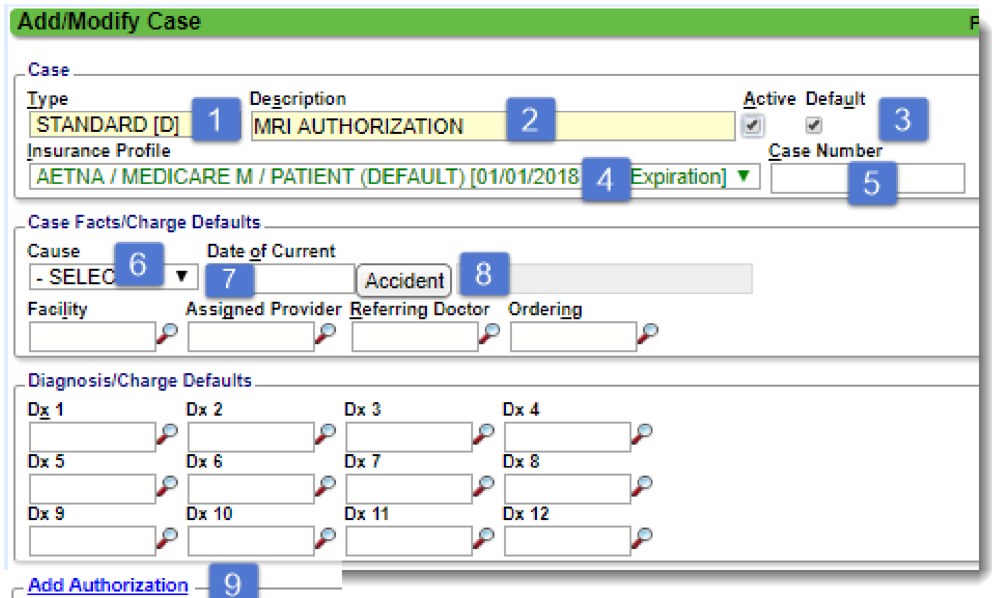
CATEGORY: CARGES ~ TASK: CASE / AUTHORIZATION

CASES - Cases house information for use for a patient's episode of care, generally for multiple charges/appointments. Common uses include Authorizations, Workers Comp, Hospitalizations, OB, DME, Accidents, Pre-certs, etc. including corresponding Insurance Profile

From > Patient Dashboard, when Scheduling an appointment, or during Charge entry. Click 'Cases' > [ADD]



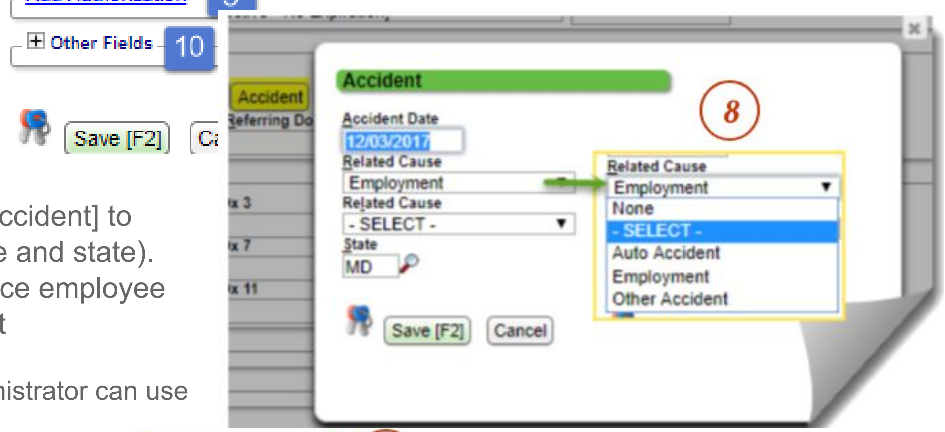
When adding a Case, we recommend a meaningful naming convention for the description, such as DOI, location, the type of Authorization,etc.



1. Type - For reporting purposes
2. Description - Displays in Charge entry/Scheduling in the Case dropdown
3. Active - If 'Active' the Case is available to use in charge entry and scheduling

Default - New charges & appointments will auto-select this Case (may be manually overridden)

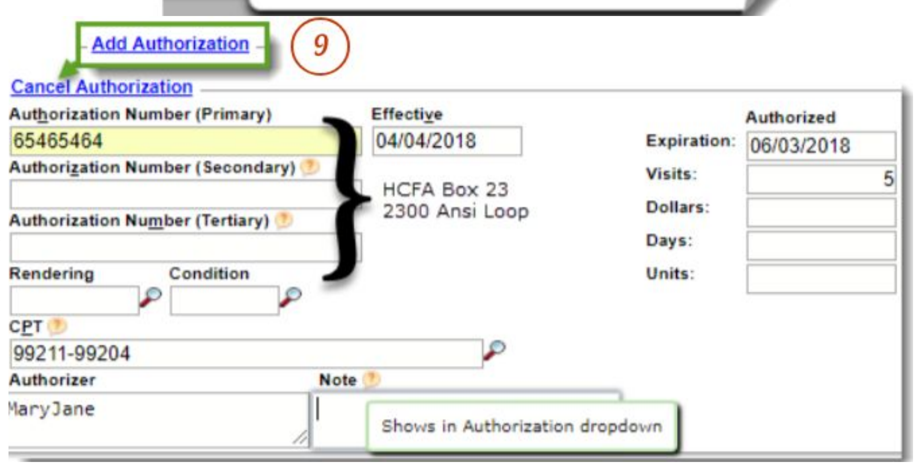
4. Insurance Profile- best practice to choose correct
5. Case Number - User defined
6. Cause -
   - Illness [L] - 431- onset date
   - Injury [I] 454 - INITIAL treatment date
   - Pregnancy [P] 484 - LMP date
7. Date of Current - for specialties, e.g.Therapy/Chiro/OB > Enter (onset / initial treatment / LMP) if required
8. Accident - For Employment (Workers Comp), Auto Accident (MVA), or other Accident >Click [Accident] to access popup (includes date, cause and state). Use **ONE** Cause - except for instance employee work is driving and has car accident



If the Dx is not mandatory, a System Administrator can use the 'Keys' to make field 'not mandatory'

9. Click 'Add **Authorizations** ' to enter authorization details

> Authorization number - displays in HCFA Box 23 / ANSI loop 2300



Cause Alerts for Scheduling / Charge Entry by entering any of the following limiting factors: Effective/Expiration Dates, # of Visits, Dollars, Days or Units, CPT Code(s)

- Authorizer: free form field for the applicable authorizer - You may prefer to use the Contact on the Case

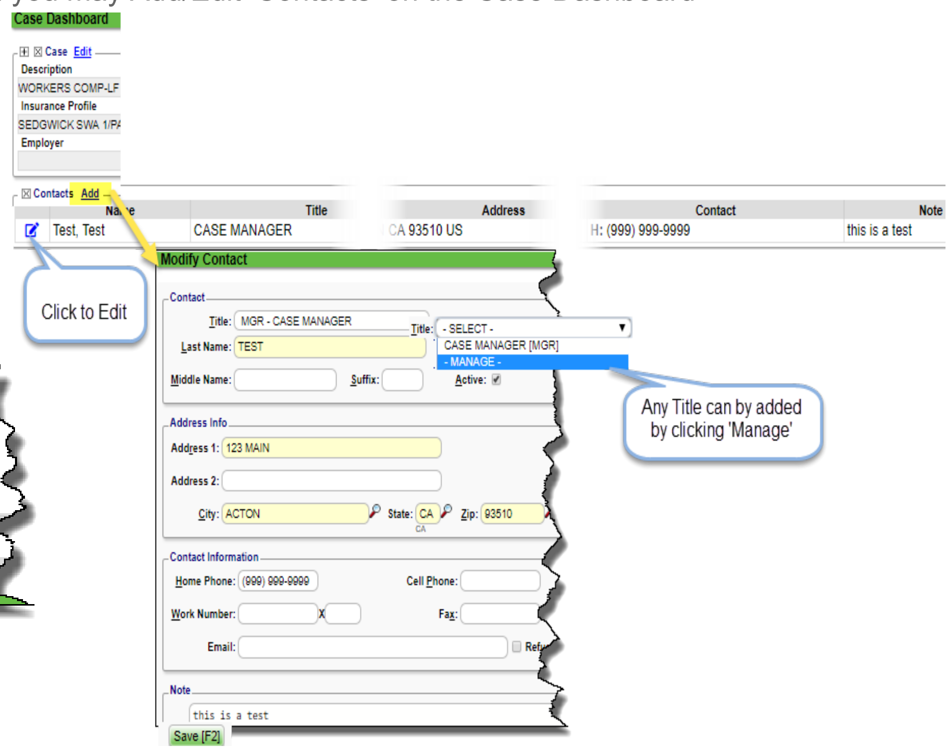
- **'Note'**: displays in the Authorization dropdown

10. **<u>Other Field</u>** > To access Click the plus sign -<u>Admitted date</u> - <u>Disability</u> - <u>Consult</u> - <u>CMN</u> - Certificate of Medical Necessity

a) Employer * informational

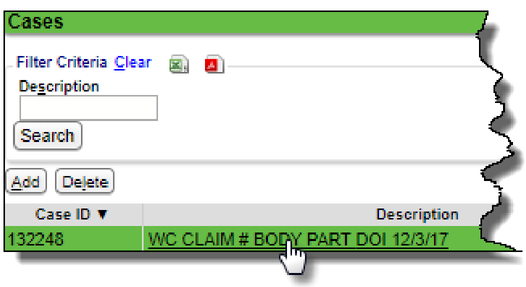
<u>Contacts</u> > Once the Case is saved you may Add/Edit 'Contacts' on the Case Dashboard

<u>To Edit</u> > Go the Case dashboard > Contact section > Click ADD



To ge to the case dashboard

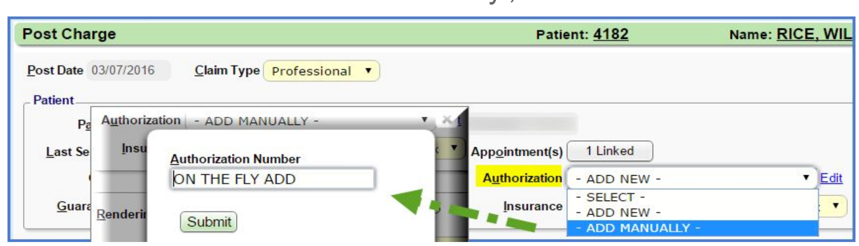
Click on the Description hyperlink



How to add an Authorization # to a Charge, *without* using a Case

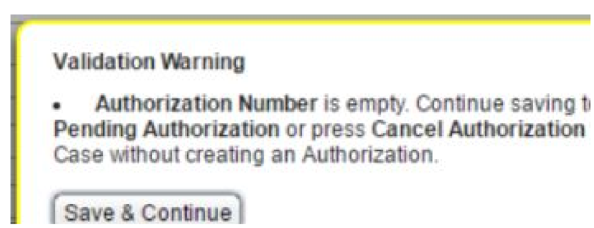
This is usually only used as a 'one and done. To add an authorization number 'on the fly', use the Authorization drop-down > Add Manually

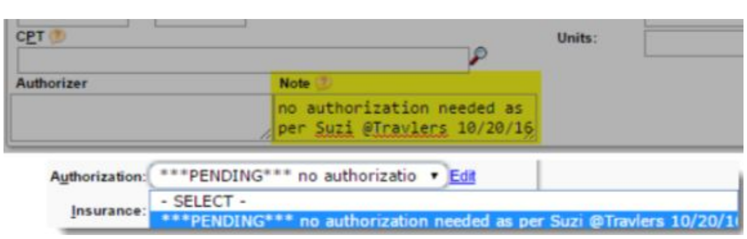
- 'Add New' is ONLY for adding an authorization to an existing Case



How should I use the Authorization section if there is no Authorization number?

Leave the Authorization Number(s) blank. A note here will cause claims to reject. In this screenshot the Authorization is being used to alert charge entry that no Authorization is needed. A validation warning will present and users can click [Save & Continue].

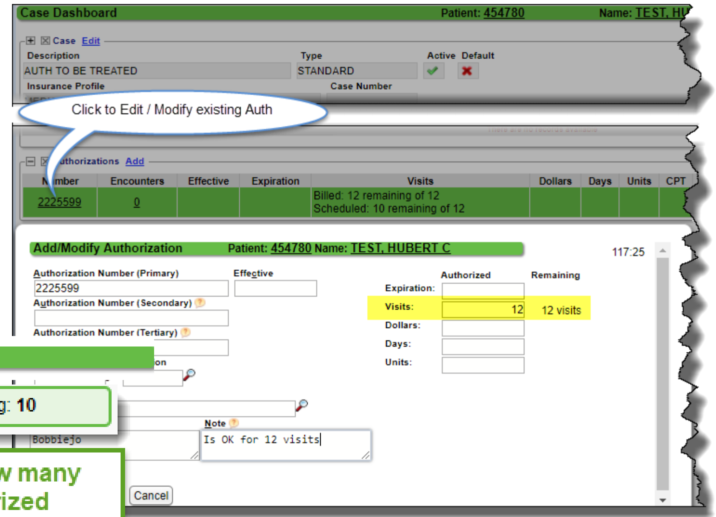


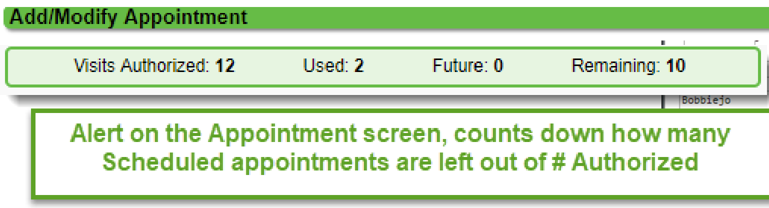


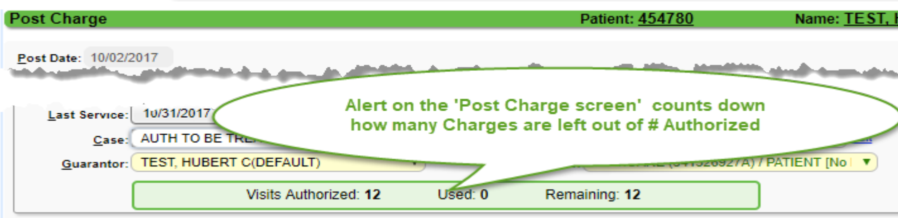
In charge entry and scheduling, the authorization verbiage is ***Pending*** and in the dropdown you can see the note entered, or for the visit countdown the banner will appear with the countdown.

How to use a Visit countdown on an Authorization?

> Add a Case
> Add an Authorization to the Case with the number of authorized Visits
> [SAVE]
The Visit Counts will appear when the Case/Authorization are chosen when scheduling an Appointment



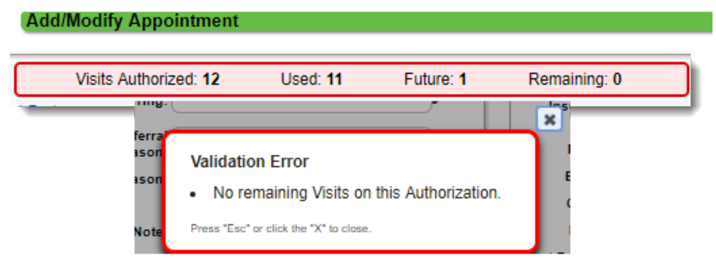




The Visit Counts will appear when the Case/Authorization are chosen when entering a Charge

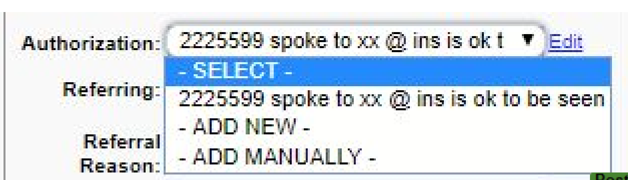
What happens when there are no remaining authorized visits?

- The system displays a red-shaded visit count, to indicate there are no remaining visits
- If you try to save you will receive a Validation Error

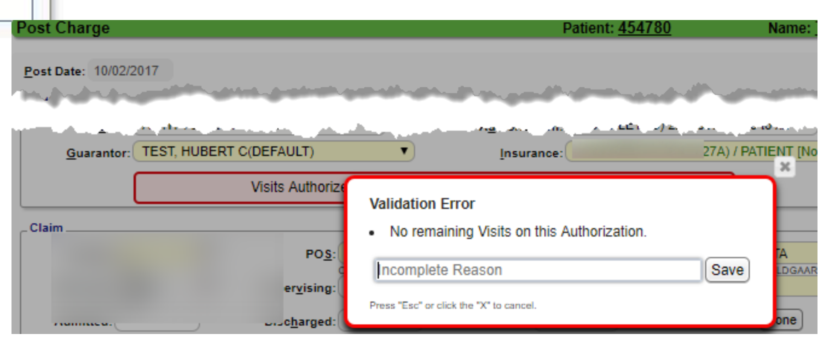


If you need to save the appointment without authorized visits > Close the validation popup

- Toggle the Authorization field to 'Select' or 'Add New'



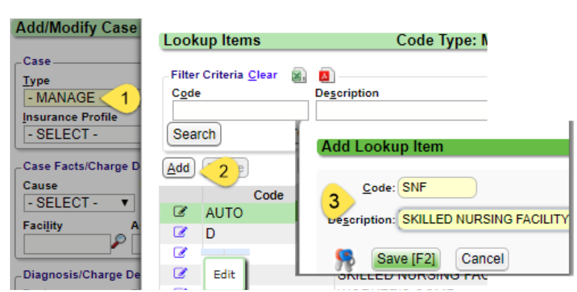
This same validation presents when posting a charge against an authorization with no remaining visits



How to add a new/custom Case Type

From Add/Modify Case screen

1. FromCase 'Type' dropdown > 'Manage'
2. [ADD]
3. Add a Code and Description > [SAVE]



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A. Click the pen icon to 'Edit'