

CATEGORY: CHARGES ~ 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 -
 - o Illness [L] - 431- onset date
 - o Injury [I] 454 - INITIAL treatment date
 - o 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

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- 'Note': displays in the Authorization dropdown

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

The screenshot shows a form titled 'Other Fields' with a plus sign icon and a circled '10'. The form contains several input fields: 'Admitted From', 'Admitted To', 'Disability From', 'Disability To', 'Consulted Date', 'Similar Illness', 'Student', and 'Employer'. The 'Employer' field has the value '1' and a magnifying glass icon. Below the fields is a 'Test Employer' button.

a) Employer * informational

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

To Edit > Go the Case dashboard > Contact section > Click ADD

The screenshot shows the 'Case Dashboard' with a 'Contacts' section. There is an 'Add' button next to the 'Contacts' header. Below it is a table with columns: Name, Title, Address, Contact, and Note. One contact is listed: 'Test, Test', 'CASE MANAGER', 'CA 93510 US', 'H: (999) 999-9999', and 'this is a test'. A blue callout bubble points to the 'Add' button with the text 'Click to Edit'. Another blue callout bubble points to the 'Title' dropdown in the 'Modify Contact' form, which is currently set to 'MGR - CASE MANAGER'. The dropdown menu is open, showing options: '- SELECT -', 'CASE MANAGER [MGR]', and '- MANAGE -'. A third blue callout bubble points to the '- MANAGE -' option with the text 'Any Title can be added by clicking \'Manage\''.

To go to the case dashboard
Click on the Description hyperlink

The screenshot shows the 'Cases' section with a search filter and a table of cases. The search filter has a 'Description' field and a 'Search' button. Below the filter are 'Add' and 'Delete' buttons. The table has columns: Case ID and Description. One case is listed: '132248' and 'WC CLAIM # BODY PART DOI 12/3/17'. A mouse cursor is pointing at the description.

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

The screenshot shows the 'Post Charge' form for Patient: 4182, Name: RICE, WIL. The 'Post Date' is 03/07/2016 and 'Claim Type' is Professional. The 'Authorization' dropdown is set to 'ON THE FLY ADD'. There is a 'Submit' button. A green arrow points to the 'Authorization' dropdown.

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].

The screenshot shows a 'Validation Warning' dialog box with the following text: 'Authorization Number is empty. Continue saving the Pending Authorization or press Cancel Authorization Case without creating an Authorization.' There is a 'Save & Continue' button.

The screenshot shows a charge entry form with a 'Note' field containing the text: 'no authorization needed as per Suzi @Travlers 10/20/16'. Below the note are 'Authorization' and 'Insurance' dropdowns. The 'Authorization' dropdown is set to '***PENDING*** no authorizatio' and the 'Insurance' dropdown is set to '***PENDING*** no authorization needed as per Suzi @Travlers 10/20/16'. There is an 'Edit' button next to the 'Authorization' dropdown.

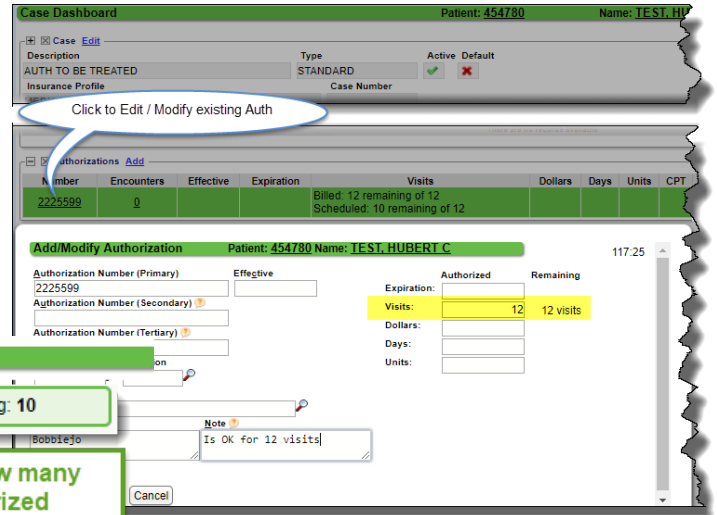
In charge entry and scheduling, the authorization verbiage is ***Pending*** and in the dropdown you can see the note entered, or for the visit countdown the

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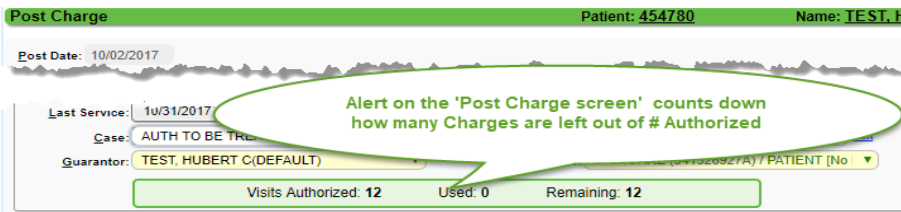
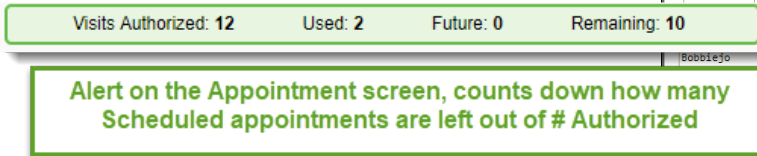
banner will appear with the countdown.

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



Add/Modify Appointment



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

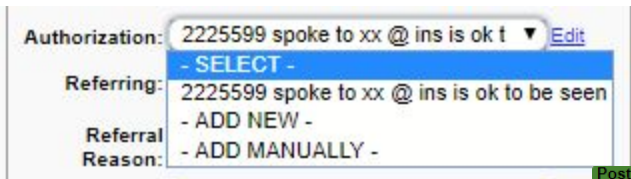
What happens when there are no remaining authorized visits?

- 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

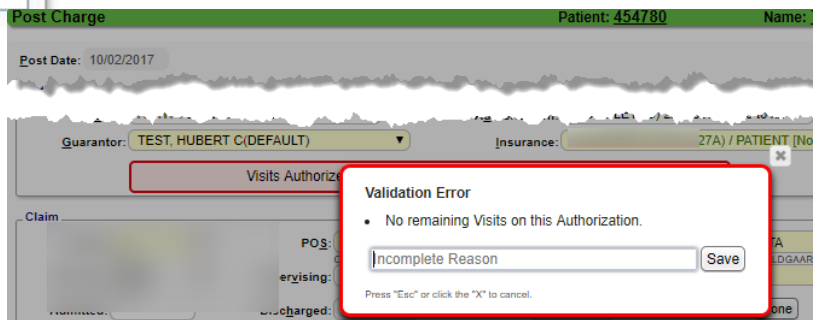
If you need to save the appointment without authorized visits > Close the validation popup

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

Add/Modify Appointment



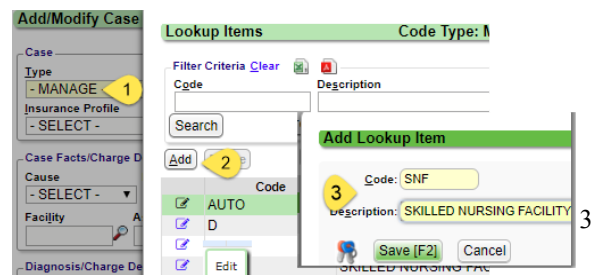
This same validation presents when posting a charge against an authorization with no remaining visits



How to add a new/custom Case Type

From Add/Modify Case screen

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



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A. Click the pen icon to 'Edit'