## **CATEGORY: CHARGES ~ TASK: Workers Compensation Case**

## Workers Compensation Policy

From Insurance Management add a new Policy > On the Add/Modify Policy screen

- 1. Insured ID > use Policy field, in some states this is SSN or 9999999999 (HCFA box 1a)
- 2. Workers Comp Claim Number > use Group field (HCFA box 11) the unique character number generated by Workers Compensation
- 3. Group name (HCFA box 11c)
- 4. If Relationship Self (18) *skip* 4/5 step: *if* Relationship Employer 20 > Employer (HCFA box 4)
- 5. Address (HCFA box 7)
  - ★ we use HCFA as a visual example, fields are on the corresponding ANSI, electronic forms as well

Add/Modify Policy	1	Patient: 2030	) <u>104</u> Name: <u>PINCHC</u>	<u>T, BRADLEY</u>	<u>r</u>		
Insurance/Policy						1a. INSURED'S I.D. NUMBER	1
Insurance				Effe <u>c</u> tive		999999999999	
17019	SEDGWICK SWA 145	73 - PO BOX 14573	LEXINGTON KY 405.	01/01/2012		4. INSURED'S NAME (Last Na	A Name. I
Address ID	E <u>x</u> piration				_	EMPLOYER, TEST	
<i>P</i>						7. INSURED'S ADDRESS (No.,	Street)
Policy		2	Group Name	3	Copay	123 MAIN ST	
99999999	WORK	ERS CLAIM # 2			0.00	CITY	
	1а нсе	A Box 11	HCEA Box	11c	ary Reasc	29 PALMS 🗾	
						ZIP CODE	TELEPHONE
1	Check Eligibility		_	_	-	92278	(
	One on Chylometry					11. INSURED'S POLICY GROU	JP OD TECANU
Insured Relationship.						WORKERS CLAIM #	2
Relationship		Policy Holder Demogra	phic Information		¥	a. INSURED'S DATE OF BIRTH MM DD YY	н
4			7			b. OTHER CLAIM ID (Designal	ed by NUCC)
Policy Holder	ueu în Tijaj însurance	FTOILLES FOR THIS F	allent	4		C. INSURA 3 AN NAME O	OR PROGRAM N
PID	ast Name		Sox 11	Mia	<b>F</b>		
F	EMPLOYER	4					
Cuffie Auure§§M							
Street Address	0 807 6702 5	HCEA Box 7					

## CASES - Workers Comp

'Cases' allows specific information for repeated charges, appointments, per patient. Insurance Profile for Workers Comp should be added first.

#### <u>Case</u>

Click <u>CASES</u> on Patient Dashboard, or Appointment / Charge page > [Add]

- 1. Type Dropdown > Choose 'Workers Comp'
- 2. 'Description' displays on charge/scheduling. We suggest this format: Date of Injury (DOI), side, location ie.'12/13/17 left ankle'
- Checkbox > Default 'Most likely' to be used for a new Appointment/ or Charge. Groups using a lot of cases keep this field blank
  - Active- allows use of this case uncheck if this case is expired or no longer needed

	Case		
Type	Tune	Description	Active Default
WORKER'S COMP [WC]		Description	Active Delaut
- SELECT -	WORKER'S COMP [WC]	WORKERS COMP-LF ANKLE 12/13/17	
AUTO ACCIDENT [AUTO]			
INPATIENT [IP]			
STANDARD [D]			
Insurance Profile		Case Number	
SEDGWICK C / PATIENT (D	EFAULT) [No Effective - No Exp	iratio 4	

- 4. 'Insurance profile', choose the Profile with the Worker Comp policy *If the policy is not yet keyed in see above for details, then return to the case to add*
- 5. Case field is grayed out until the case is saved and a number is assigned



es [1]

# **CATEGORY: CHARGES ~ TASK: Workers Compensation Case**

- 6. \*this may not be required in your state If Injury or Illness Cause is required > Illness [L] 431- sends onset date Injury [I] 454- sends INITIAL treatment date
- 7. Click [Accident] \*required
  - DOI, Cause, State > [Save]
- only one Cause is generally needed
- 8. You may key in an assigned DX code
- Usually left blank when the charge originates in the EMR

OFLEOT	Date of	Current	
- SELECT		7 Accide	nt
acility	Assigned	Provider Referring	D
			_
in an an a si a l C	haves Defaults	F	
iagnosis/C	harge Defaults	F L	
iagnosis/C	harge Defaults	Dx 3	
liagnosis/C	harge Defaults	Dx 3	
liagnosis/C	harge Defaults	Dx 3	

Accident	
Accident Date	
12/13/2017	
Related Cause	
Employment	7
Related Cause	'
- SELECT -	•
State	
CA 👂	

## **Authorization**

> Click 'Add Authorization' if needed

Add Authorization Cancel Authorization Authorization Number (Primary) Effective Authorized 07/09/2018 Expiration: 12345645 07/09/2019 **Trigger Authorization Alerts for** Authorization Number (Secondary) 🤅 Visits: Scheduling and Charge Entry: Dollars: Authorization Number (Tertiary) 🤔 Effective/Expiration Days: # of Visits, Dollars, Days Units, CPT Rendering Condition Units: P  $\mathcal{L}$ 'Authorizer' is a free form field- you СРТ 🕐 P may prefer to use 'Contact' after you Authorizer Note save the Case to add Case Manager Shows in Authorization dropdown

#### Other Field > To access Click the plus

sign \*informational only- not used on claims

a) Employer

information

- b) Body Side dropdown Right, Left, Bilateral, None/Other
- c) Body Part choose from the lookup

<mark>. ⊕</mark> Oth	er Fields			
_	Admitted From	Admitted To	Disa <u>b</u> ility From	Disability To
	Consulted Date	Similar Illness	Student	Test Employer
	Body Side Right b ▼	Body Part	Other Claim ID	<u>W</u> C Claim ID 123456789 d

d) Manually key in the 'WC Claim ID' - the unique character number generated by Workers Compensation

## [SAVE] the Case

#### Contacts

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

?
Туре
WC BOD
Ca

# **CATEGORY: CHARGES ~ TASK: Workers Compensation Case**

Na. e         Inte         Address         Contact           Image: Contact         CASE MANAGER         CA 93510 US         H: (999) 999-9999         this is a test	Note
Modify Contact         Contact         Last Name:         Last Name:         Suffix:         Address info         Address 1:         Address 1:         (22 MAIN)         Address 2:         City:         Contact Information         Home Phone:         Home Phone:         Work Number:         Address 1:         Email:         Note         This 1s a test	

**To Edit** > Go the Cases page> Click the Description hyperlink



## **Condition code**

If a condition code is needed on HCFA Box 10D

Encounter Dashboard > Click 'HCFA Fields' link

- Look for box 10 -
- Enter the code needed
- [Save]

#### How can I use appointment worklist

On the appointment page

- 1. Click [to worklist]
- 2. Add Subject, Assignee etc
- 3. Add a note > Click 'Add Note'
- 4. Save

Actions	
Modify Charge	Change Claim Status
To Collections	Re-Apply Patient Credi

mð m	Check Out	New 1	To Worklist		
]	Check Out	New 1	To Worklist		
it item	New It	em			
			_⊟ Other Worklist	s [0]	
be a new DOI	<	2	_Notes		
ter's Comp		•	patient states	fell @ work this wee	k and my be a
MAL		•	injury		< 3
LECT -		•		🔶 Add Note 🗸	
LECT -		•			
	T <u>i</u> me:	<u>clear</u>			
	Ti <u>m</u> e:	clear			
5 7 2					
k	be a new DOI ker's Comp RMAL LECT - LECT -	be a new DOI ker's Comp RMAL LECT - LECT - Time: Time:	be a new DOI 2 ker's Comp V MAL V LECT V LECT V LECT C Time: clear Time: clear 5 7 6	be a new DOI 2 ker's Comp   MAL  LECT-  Time:  clear  time:  time: ti	be a new DOI 2 ker's Comp MAL LECT- Time: Clear Time: Ti