

# Practice EHR | User Guide

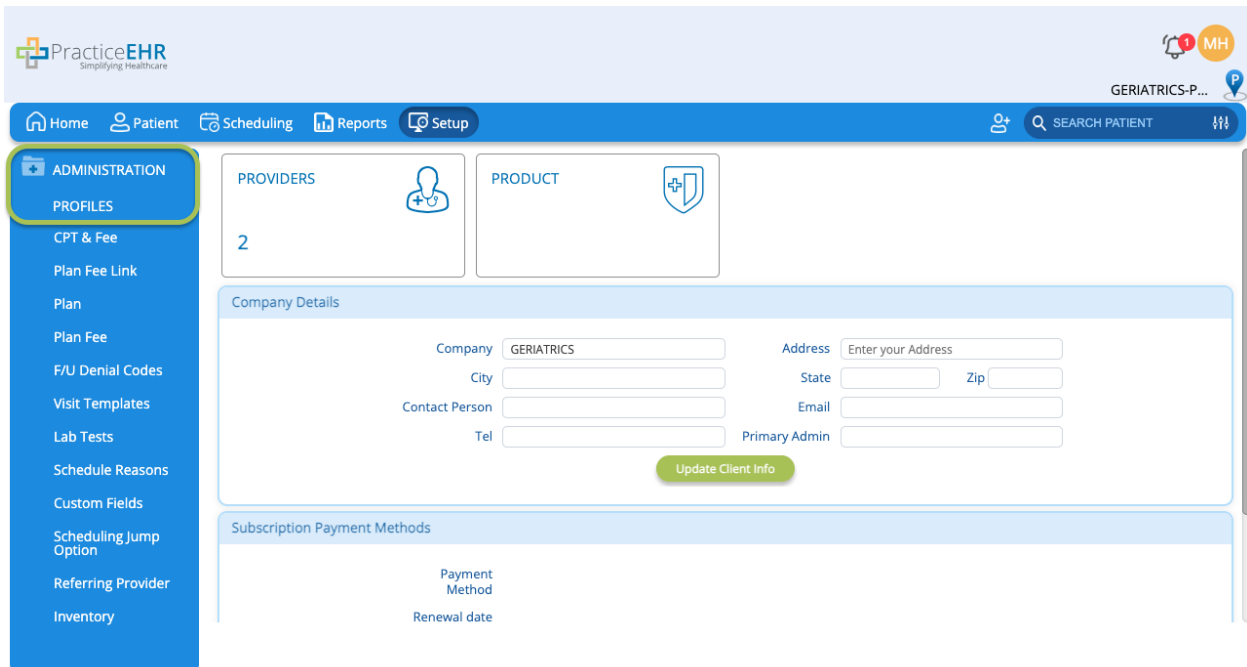
## Setup Module | Part 2



# Setup Module

The Setup module within Practice EHR can be used to manage and customize the environment based on a practice's specific needs. The Setup module is basically divided into two parts:

1. Administration
2. Profiles

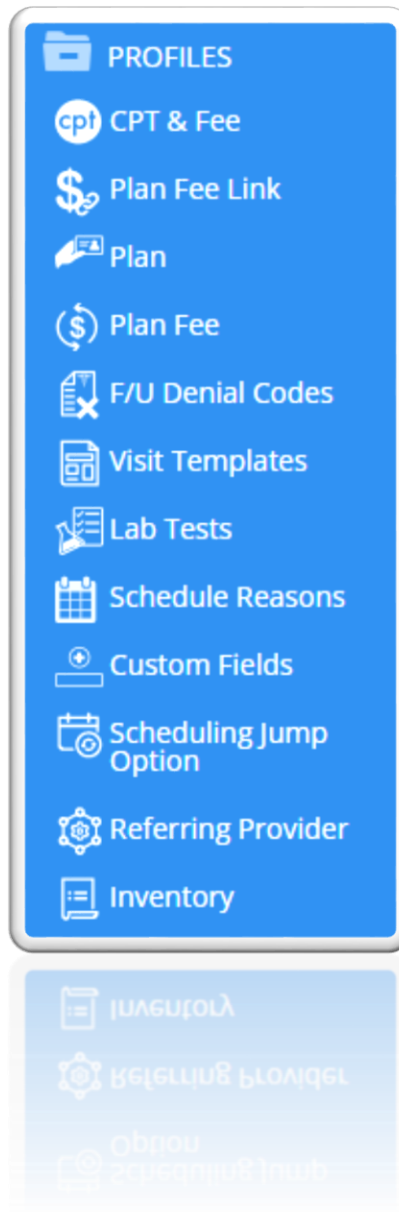


The screenshot displays the PracticeEHR Setup Module interface. The top navigation bar includes Home, Patient, Scheduling, Reports, and Setup. The left-hand navigation bar is expanded, showing 'ADMINISTRATION' and 'PROFILES' as active sections. The main content area features two cards: 'PROVIDERS' with a count of 2 and a person icon, and 'PRODUCT' with a count of 1 and a shield icon. Below these is the 'Company Details' section, which contains form fields for Company (GERIATRICS), Address (Enter your Address), City, State, Zip, Contact Person, Email, Tel, and Primary Admin. An 'Update Client info' button is located below the form fields. The 'Subscription Payment Methods' section is partially visible at the bottom, showing columns for Payment Method and Renewal date.

These can be accessed from the navigation bar on the left-hand side of the screen.

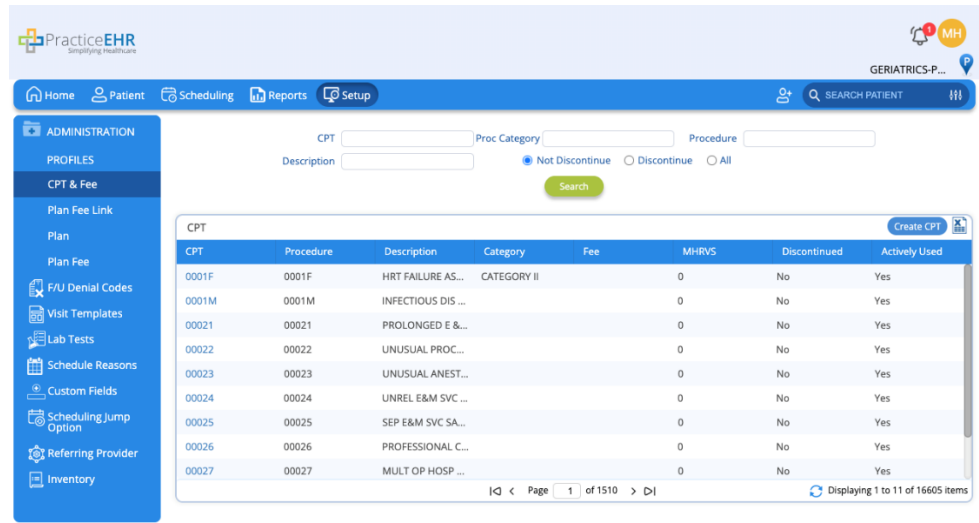
## 1. Profiles

The Profiles section of the Setup module allows the user to access the following setups:



## 2.1. CPT & Fee

This section of the Setup module can be used to search for existing CPTs and modify them or create CPTs.

The screenshot shows the Practice EHR Setup module with the 'CPT & Fee' section selected in the left-hand navigation menu. The main area contains search filters for CPT code, Proc Category, Procedure, and Description, along with radio buttons for 'Not Discontinue', 'Discontinue', and 'All'. A 'Search' button is present. Below the filters is a table of CPT codes with columns for CPT, Procedure, Description, Category, Fee, MHRVS, Discontinued, and Actively Used. A 'Create CPT' button is located at the top right of the table area.

CPT	Procedure	Description	Category	Fee	MHRVS	Discontinued	Actively Used
0001F	0001F	HRT FAILURE AS...	CATEGORY II		0	No	Yes
0001M	0001M	INFECTIOUS DIS ...			0	No	Yes
00021	00021	PROLONGED E &...			0	No	Yes
00022	00022	UNUSUAL PROC...			0	No	Yes
00023	00023	UNUSUAL ANEST...			0	No	Yes
00024	00024	UNREL E&M SVC ...			0	No	Yes
00025	00025	SEP E&M SVC SA...			0	No	Yes
00026	00026	PROFESSIONAL C...			0	No	Yes
00027	00027	MULT OP HOSP ...			0	No	Yes

- The user can search for a CPT by entering the code in the designated CPT tab and then clicking “**Search.**” The search result will enlist all the CPTs if the search tabs are left empty.
- The user can also create a new CPT by clicking “**Create CPT**” on the top left-hand side of the search result section.
- To export the results to Excel by clicking on the **Excel sheet icon** present on the top left-hand side of the search result section.

## 2.2. Plan Fee Link

A user can create a link for a fee schedule within Practice EHR using the Plan Fee Link section of the Setup module.



Plan Fee Link  Description

Search

Plan Fee Link

Plan Fee Link	Description
No Data Found	

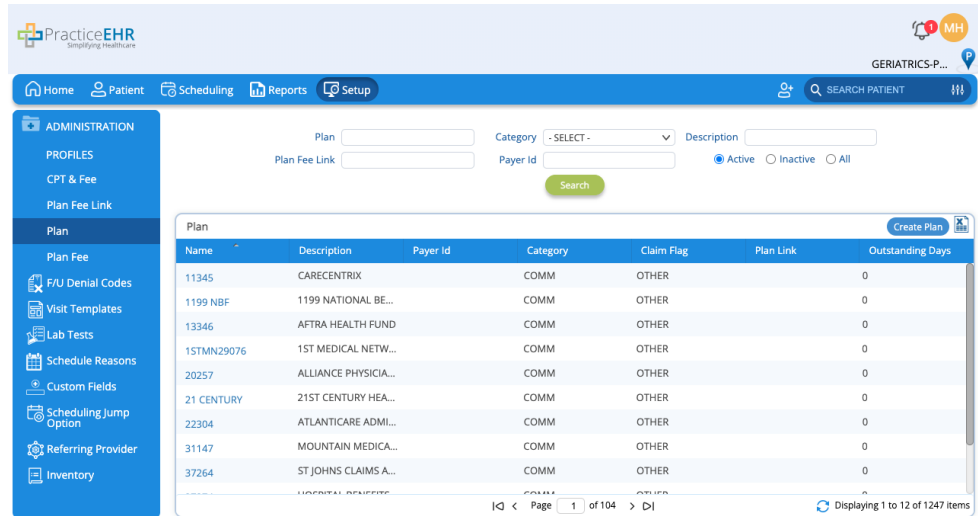
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To create a plan fee link:

- Click **“Search.”**
- A list of all the created plan fee links will appear in the search result section of the screen.
- Click **“Create Plan Fee Link.”**
- Enter the name and description of the plan fee link.
- Click **“Create Plan Fee Link.”**



## 2.3. Plan



The screenshot shows the Practice EHR Setup module. The left sidebar contains the following menu items: ADMINISTRATION, PROFILES, CPT & Fee, Plan Fee Link, Plan, Plan Fee, F/U Denial Codes, Visit Templates, Lab Tests, Schedule Reasons, Custom Fields, Scheduling Jump Option, Referring Provider, and Inventory. The main area displays a search form with fields for Plan, Category, Description, Plan Fee Link, and Payer Id, along with radio buttons for Active, Inactive, and All. Below the search form is a table of plans:

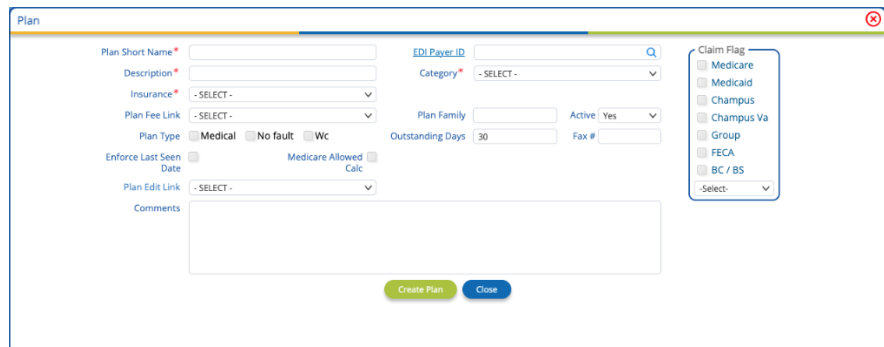
Name	Description	Payer Id	Category	Claim Flag	Plan Link	Outstanding Days
11345	CARECENTRIX		COMM	OTHER		0
1199 NBF	1199 NATIONAL BE...		COMM	OTHER		0
13346	AFTRA HEALTH FUND		COMM	OTHER		0
15TMN29076	15T MEDICAL NETW...		COMM	OTHER		0
20257	ALLIANCE PHYSICIA...		COMM	OTHER		0
21 CENTURY	21ST CENTURY HEA...		COMM	OTHER		0
22304	ATLANTICARE ADMI...		COMM	OTHER		0
31147	MOUNTAIN MEDICA...		COMM	OTHER		0
37264	ST JOHNS CLAIMS A...		COMM	OTHER		0

At the bottom of the table, it indicates "Page 1 of 104" and "Displaying 1 to 12 of 1247 items".

This section of the Setup module allows the user to create and manage insurance plans. Even if billing is not performed within Practice EHR, this section may need to be included in the initial setup.

To create a new plan:

- Click **“Create Plan”** on the top left-hand corner of the search result section.



The screenshot shows the 'Create Plan' form. It includes the following fields and options:

- Plan Short Name\*
- EDI Payer ID (with search icon)
- Description\*
- Category\* (-SELECT-)
- Insurance\* (-SELECT-)
- Plan Fee Link (-SELECT-)
- Plan Family
- Active: Yes (selected)
- Plan Type:  Medical,  No fault,  Wc
- Outstanding Days: 30
- Fax #
- Enforce Last Seen Date
- Medicare Allowed Calc
- Plan Edit Link (-SELECT-)
- Comments (text area)
- Claim Flag dropdown:  Medicare,  Medicaid,  Champus,  Champus Va,  Group,  FECA,  BC / BS,  -Select-

Buttons for 'Create Plan' and 'Close' are located at the bottom.

- Enter the **“EDI Payer ID,”** which is required if an electronic claim is to be submitted. Without the EDI payer ID, the claims reported against that plan will be submitted as a paper claim.

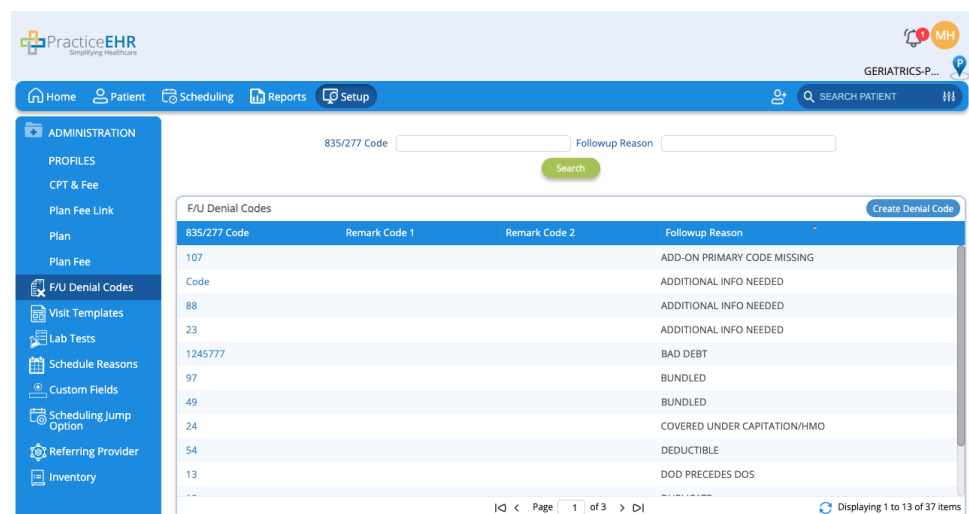


- Enter a short name for the plan along with the description in the “**Plan Short Name**” and “**Description**” slots, respectively. These will be specific to the practice and can be easily identified by the staff when registering a patient.
- The “**Plan Family**” field allows the practice to control when and to which plans a secondary claim may be sent.
- Enter the available information into the designated fields and click “**Create Plan.**”

## 2.4. F/U Denial Codes

When a remit is received from an insurance plan, the industry-standard denial codes are captured and used to assist in organizing the claims within the plan follow-up. The system default is used by most practices.

However, if the practice intends to handle a specific denial in a specific manner or if an individual plan does not follow industry-standard denial codes, individual codes and mapping can be entered in this section of the Setup module.

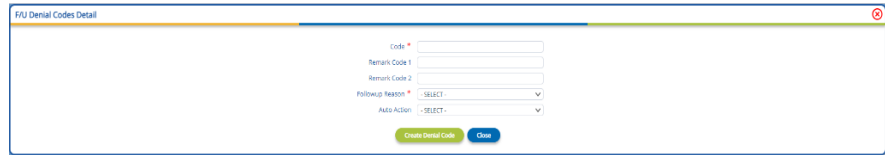


Code	Remark Code 1	Remark Code 2	Followup Reason
107			ADD-ON PRIMARY CODE MISSING
Code			ADDITIONAL INFO NEEDED
88			ADDITIONAL INFO NEEDED
23			ADDITIONAL INFO NEEDED
1245777			BAD DEBT
97			BUNDLED
49			BUNDLED
24			COVERED UNDER CAPITATION/HMO
54			DEDUCTIBLE
13			DOD PRECEDES DOS

To create a denial code:



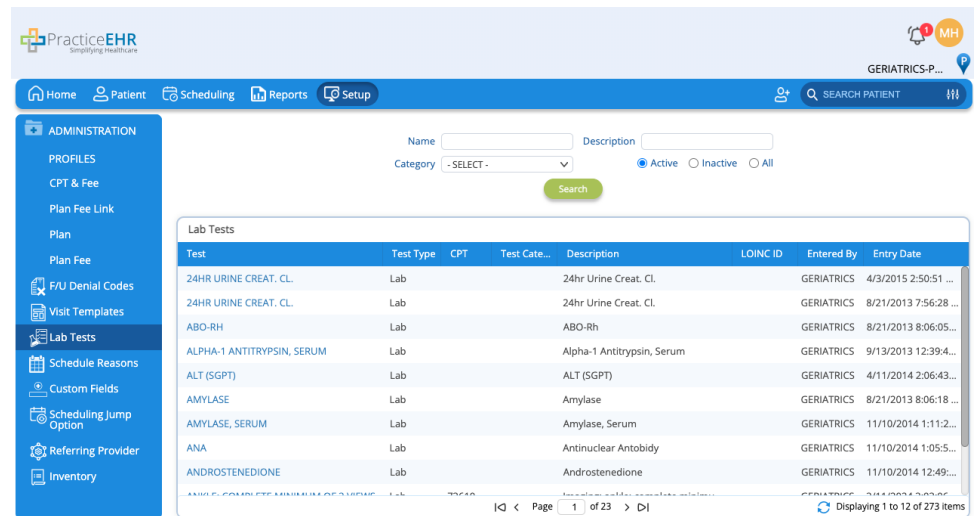
- Click **“Create Denial Code”** on the top left-hand side of the search result section.



- Enter your required code.
- Select a follow-up reason to map it to the entered code from the **“Followup Reason”** drop-down menu.
- Click **“Create Denial Code.”**

## 2.5. Lab Tests

All diagnostic testing within Practice EHR is managed within the Lab tab of the Patient module. Each diagnostic test is ordered from a master directory, displayed in the Lab Tests section of the Setup module.



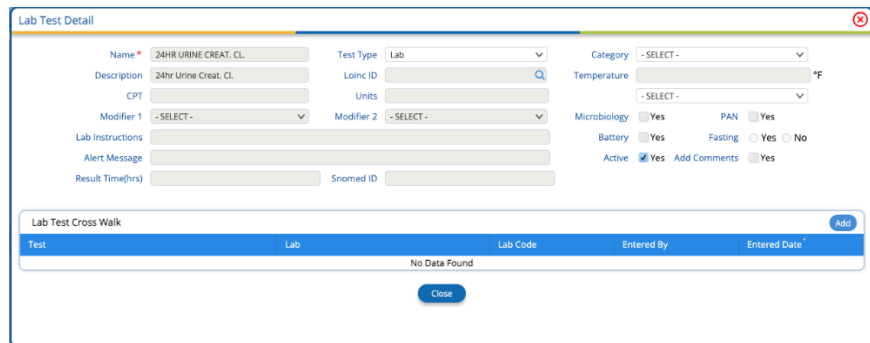
Test	Test Type	CPT	Test Cate...	Description	LOINC ID	Entered By	Entry Date
24HR URINE CREAT. CL.	Lab			24hr Urine Creat. CL	GERIATRICS	4/3/2015 2:50:51 ...	
24HR URINE CREAT. CL.	Lab			24hr Urine Creat. CL	GERIATRICS	8/21/2013 7:56:28 ...	
ABO-RH	Lab			ABO-Rh	GERIATRICS	8/21/2013 8:06:05...	
ALPHA-1 ANTITRYPSIN, SERUM	Lab			Alpha-1 Antitrypsin, Serum	GERIATRICS	9/13/2013 12:39:4...	
ALT (SGPT)	Lab			ALT (SGPT)	GERIATRICS	4/11/2014 2:06:43...	
AMYLASE	Lab			Amylase	GERIATRICS	8/21/2013 8:06:18 ...	
AMYLASE, SERUM	Lab			Amylase, Serum	GERIATRICS	11/10/2014 1:11:2...	
ANA	Lab			Antinuclear Antibody	GERIATRICS	11/10/2014 1:05:5...	
ANDROSTENEDIONE	Lab			Androstenedione	GERIATRICS	11/10/2014 12:49:...	

Adding individual diagnostic tests to this directory can only be done by the support team of Practice EHR. However, the practice can access this section of the Setup module to link a procedure code associated with a specific diagnostic test. To do so,





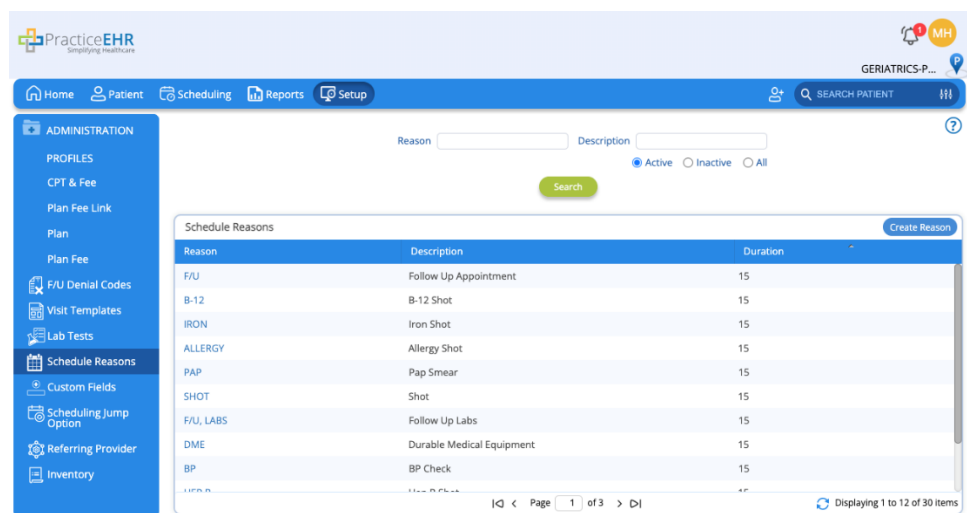
- Click on the specific diagnostic test.



- Click **"Add"** on the left-hand side of the screen under **"Lab Test Cross Walk."**
- Select the lab and enter the lab code.
- Click **"Create Lab Test Cross Walk."**

## 2.6. Schedule Reasons

Each appointment scheduled within Practice EHR will be assigned a reason. The system allows the practice to create these reasons through the Schedule Reasons section of the Setup module.



Reason	Description	Duration
F/U	Follow Up Appointment	15
B-12	B-12 Shot	15
IRON	Iron Shot	15
ALLERGY	Allergy Shot	15
PAP	Pap Smear	15
SHOT	Shot	15
F/U, LABS	Follow Up Labs	15
DME	Durable Medical Equipment	15
BP	BP Check	15

The user can either modify existing reasons or create a new reason. To modify an existing reason:



- Click on the reason hyperlink.

- Make the required changes.
- Click **“Update Reason.”**
- The user can also delete the reason by simply unchecking the **“Active”** box.

To create a new reason:

- Click **“Create Reason”** on the top left-hand side of the search result section.
- Enter the reason, description, and duration, and assign a color to the reason.
- Click **“Create Reason.”**

## 2.7. Custom Fields

The system allows the practice to create custom fields in various tabs of Practice EHR for the purpose of tracking additional information.



To create a custom field:

- Click **“Create Custom Field”** on the top left-hand side of the search result section.

- A box will appear with three fields that must be filled.
- The **“Window”** drop-down menu can be used to select the section or tab of Practice EHR where the user wants to create a custom field.
- Type the name of the custom field in the **“Custom Field Name”** tab.
- You can create the custom field either as a textbox or a drop-down menu by using the **“Custom Field Type”** drop-down menu.
- Click **“Create Custom Field.”**

## 2.8. Scheduling Jump Options

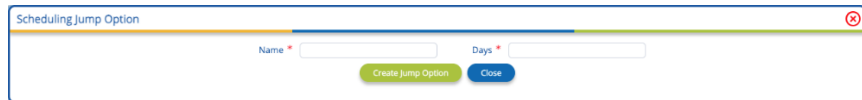
Scheduling Jump Options will assist the front desk when scheduling routine follow-up appointments.



For example, the provider can ask the patient to return in four days or in two months for a follow-up. This time interval can be set as a “jump to” option within the Scheduling Jump Options section of the Setup module.

To create a jump option:

- Click “**Create Jump Option**” on the top left-hand side of the search result section.



- Enter the name for the jump option, which will appear in the Scheduling module.



- Enter the number of days that are supposed to be skipped once the option is selected.
- Click “**Create Jump Option.**”