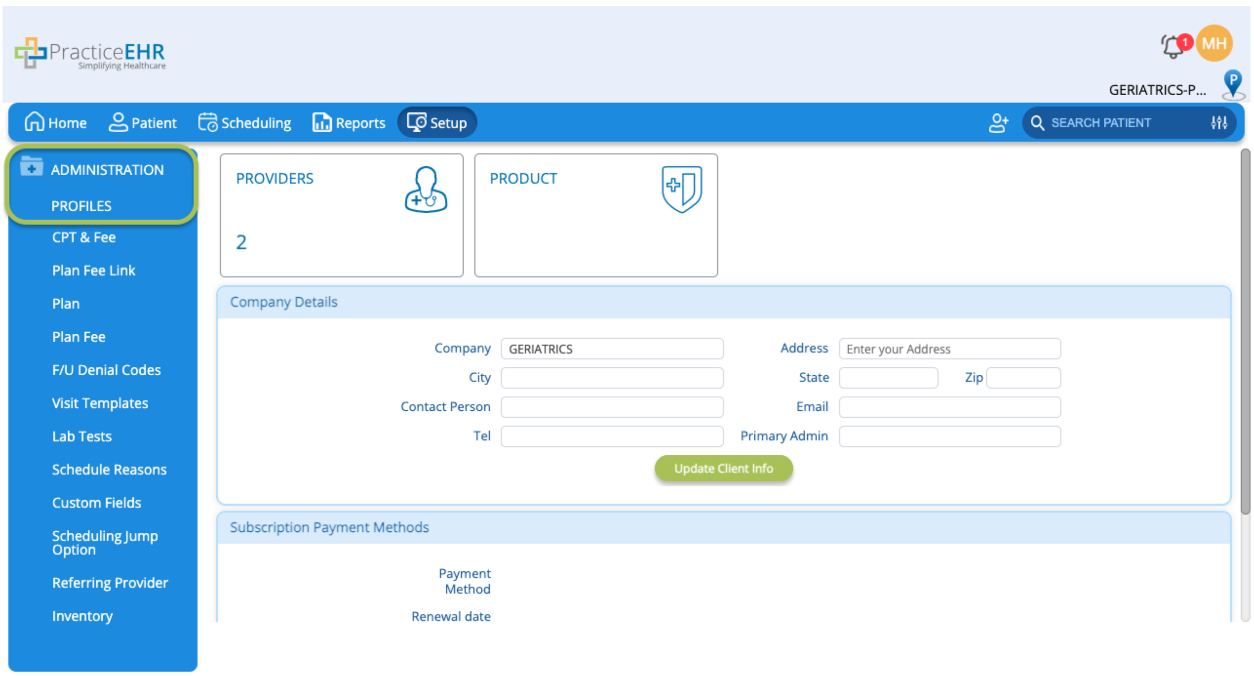
Practice EHR | User Guide

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:

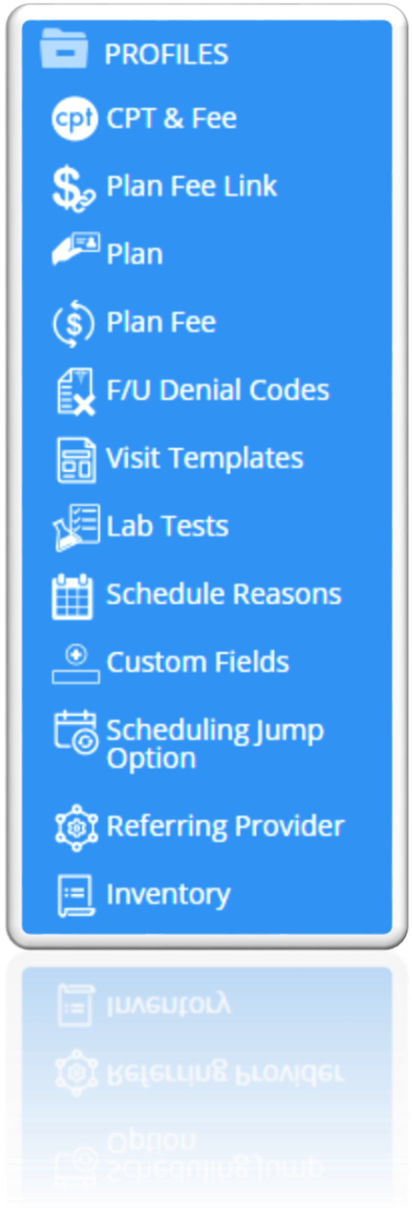
1. Administration
2. Profiles



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

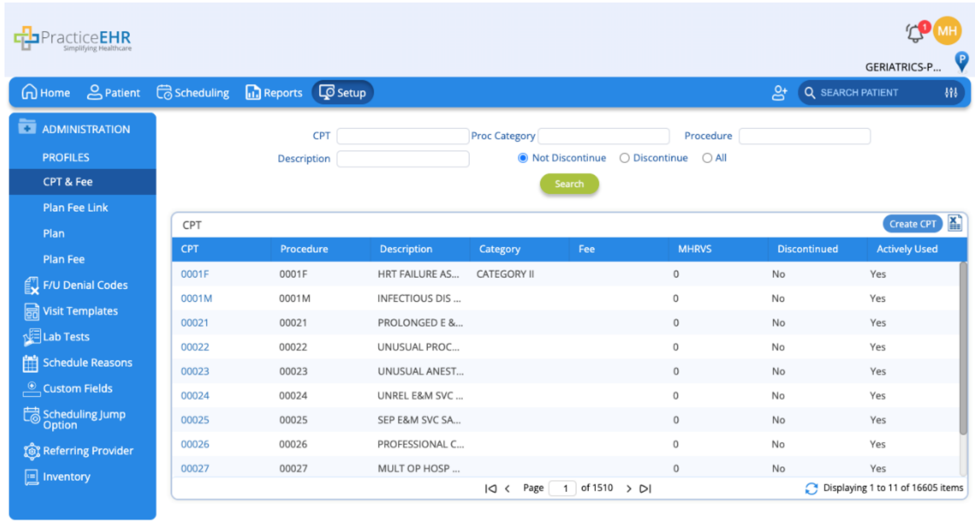
1. Profiles

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



2.1. CPT & Fee

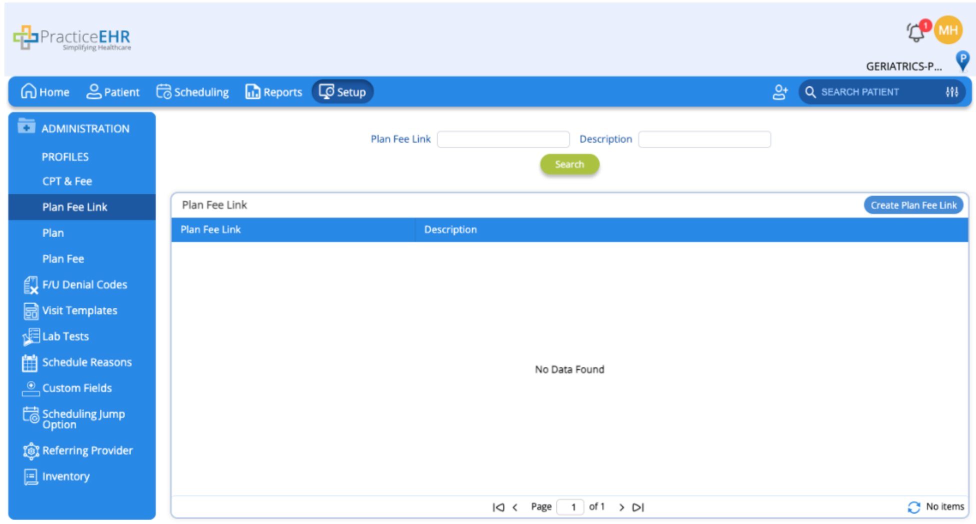
This section of the Setup module can be used to search for existing CPTs and modify them or create CPTs.



- The 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

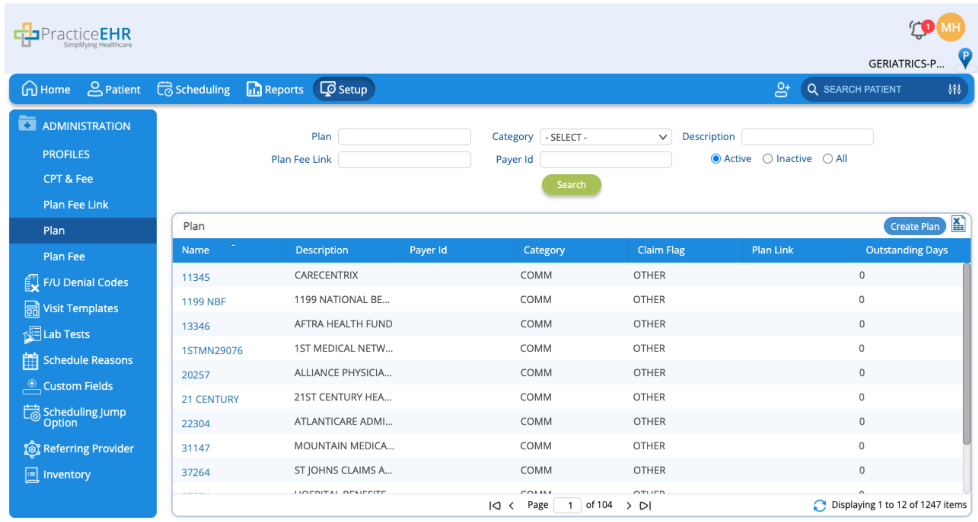
A user can create a link for a fee schedule within Practice EHR using the Plan Fee Link section of the Setup module.



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**."

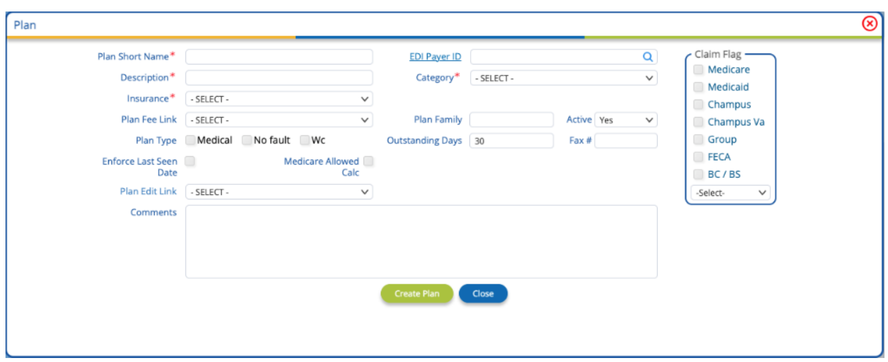
2.3. Plan



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.



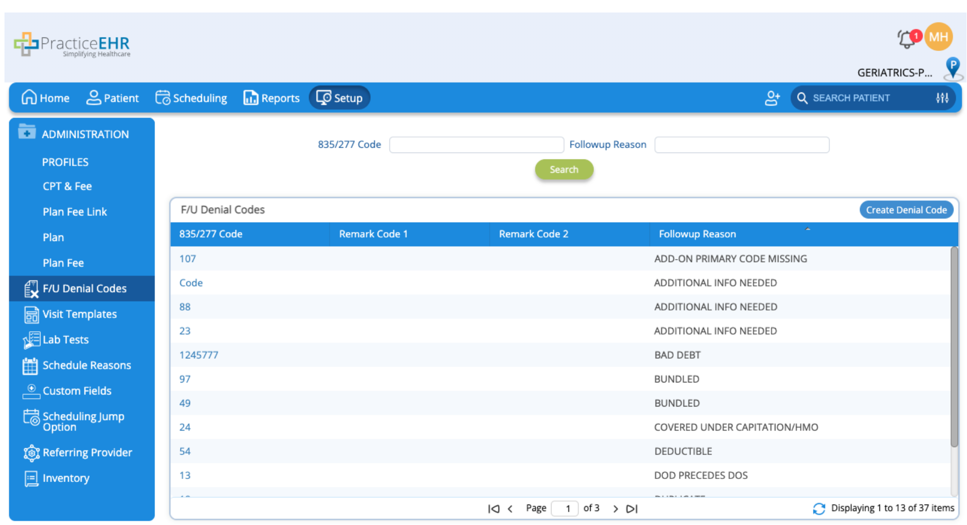
- Enter the "**EDI Payer ID**," which is required if an electronic claim is to be submitted. Without the EDI payer ID, the claims reported against that plan will be submitted as a paper claim.

- 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

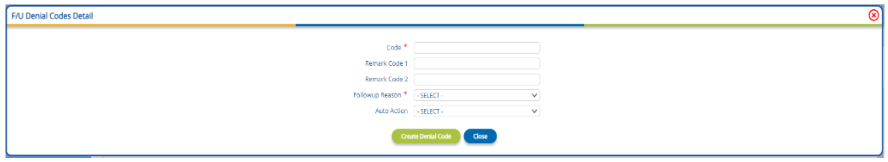
When a remit is received from an insurance plan, the industry-standard denial codes are captured and used to assist in organizing the claims within the plan follow-up. The system default is used by most practices.

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.



To create a denial code:

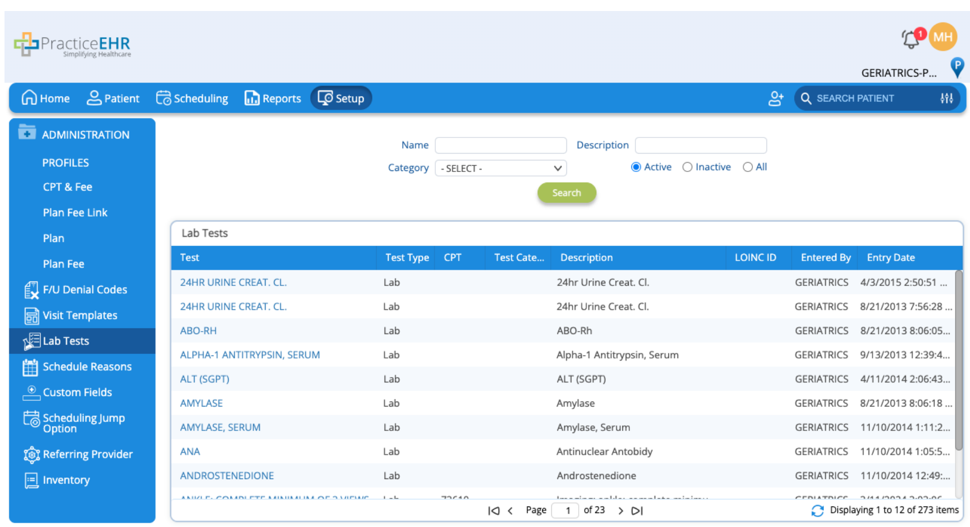
- Click "**Create Denial Code**" on the top left-hand side of the search result section.



- 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.**"

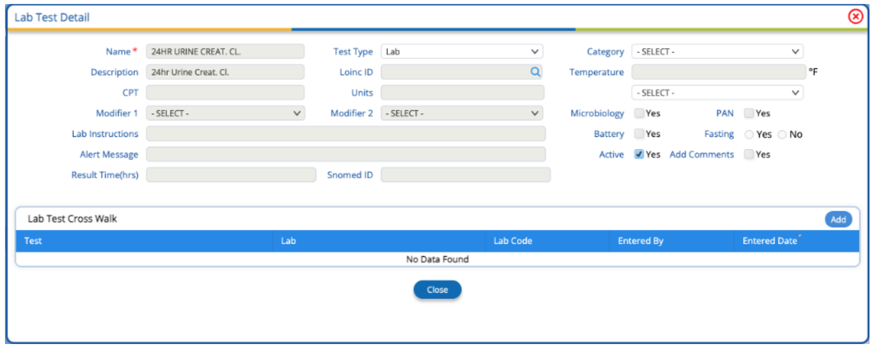
2.5. Lab Tests

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.



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,

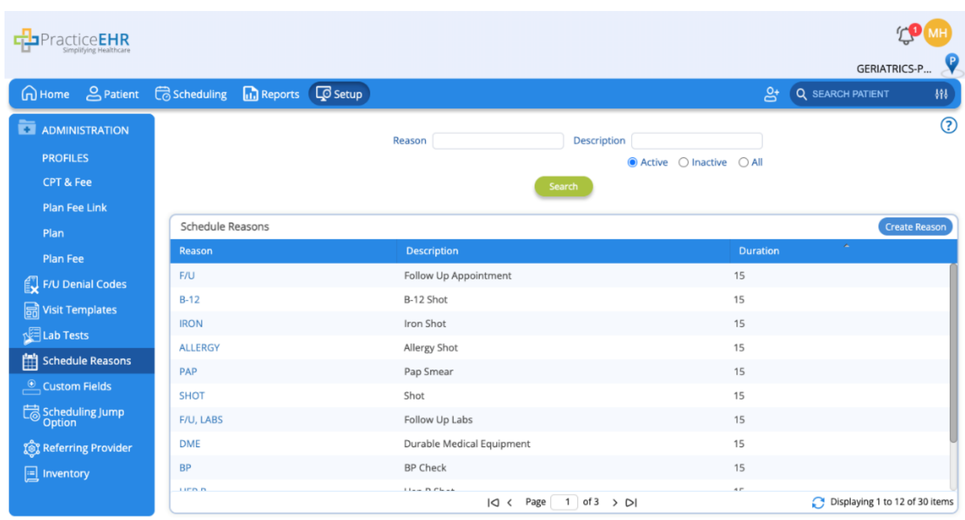
- Click on the specific diagnostic test.



- 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**.”

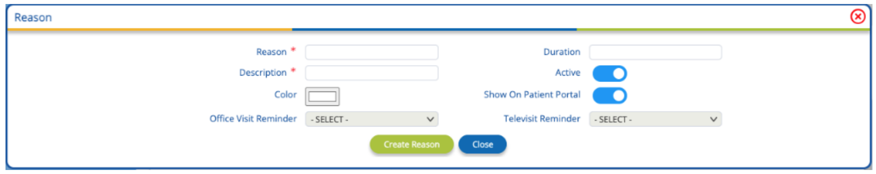
2.6. Schedule Reasons

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.



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

- Click on the reason hyperlink.



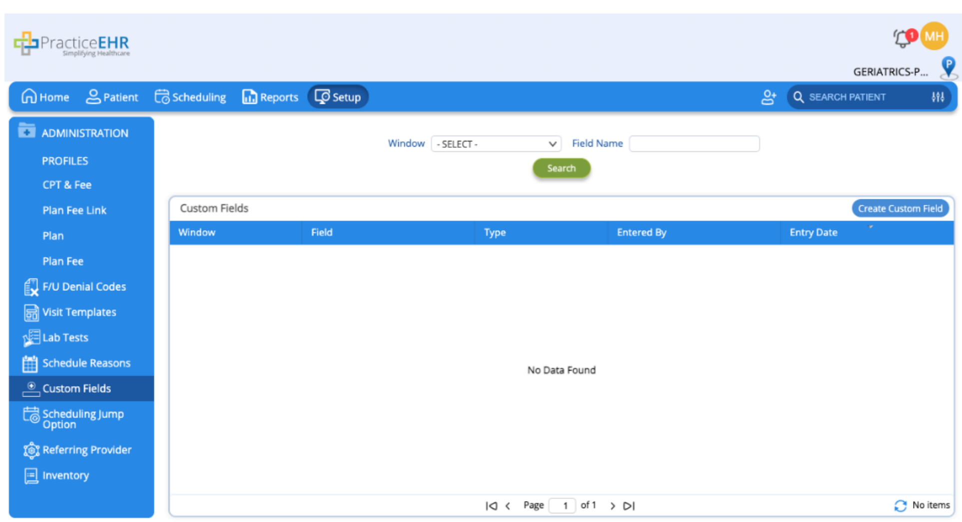
- Make the required changes.
- Click "**Update Reason.**"
- The user can also delete the reason by simply unchecking the "**Active**" box.

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.**"

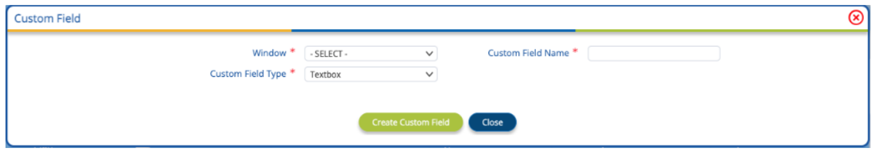
2.7. Custom Fields

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:

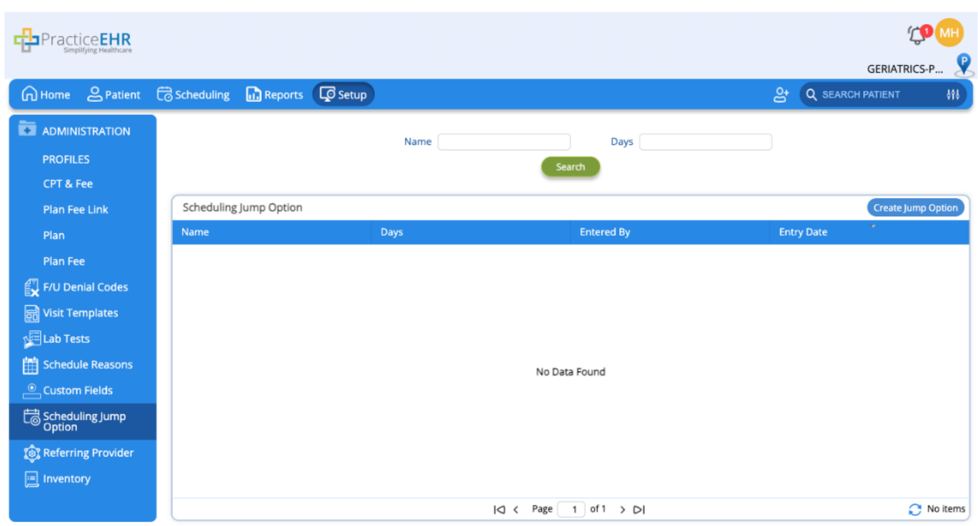
- Click "**Create Custom Field**" on the top left-hand side of the search result section.



- 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

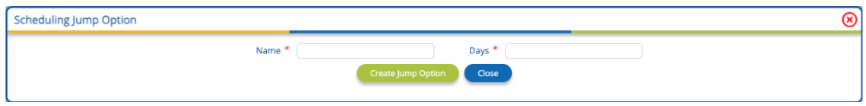
Scheduling Jump Options will assist the front desk when scheduling routine follow-up appointments.



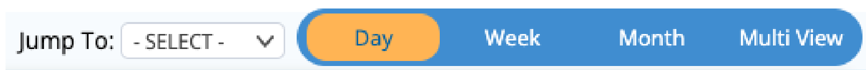
For example, the provider can ask the patient to return in four days or in two months for a follow-up. This time interval can be set as a "jump to" option within the Scheduling Jump Options section of the Setup module.

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**."