HEALTHCO
INFORMATION SYSTEMS®
Your Partner In Practice.

CENTRICITY CHANNEL PARTNER OF THE YEAR · 2013 & 2014 · Partner GE Healthcare

Auditing tools for Centricity Practice Solutions – a Health Check

Disclaimer

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HealthCo - Our Story

- Value Added Reseller
- Over 400 clinics
- 2013 and 2014 GE Channel Partner of the Year

Presenter: Kelly McAvoy, Implementation Consultant

Co-Presenter: Kellie Armijo, Implementation Consultant

Agenda

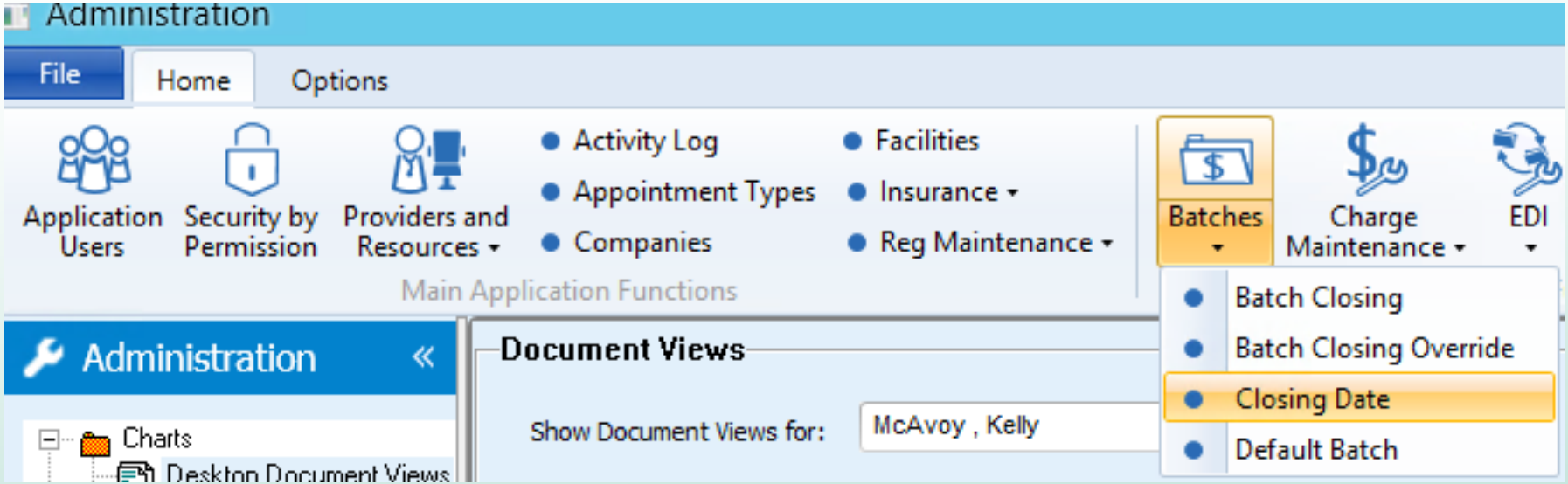
- Practice Management service points
- Chart Component tune up
- Bonus check points

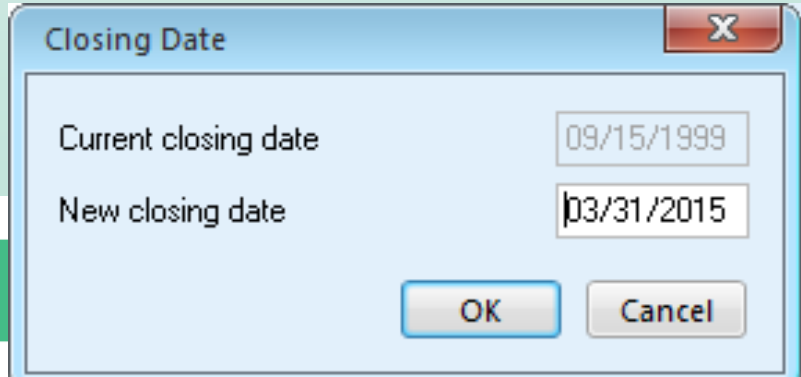
Practice Management / Financial

Closing Date

- Is your Closing Date set and set regularly?
  - *Impacts reporting*
  - *Controls financial reporting*
  - *Monthly or more often is recommended*

Administration>Batches> Closing Date

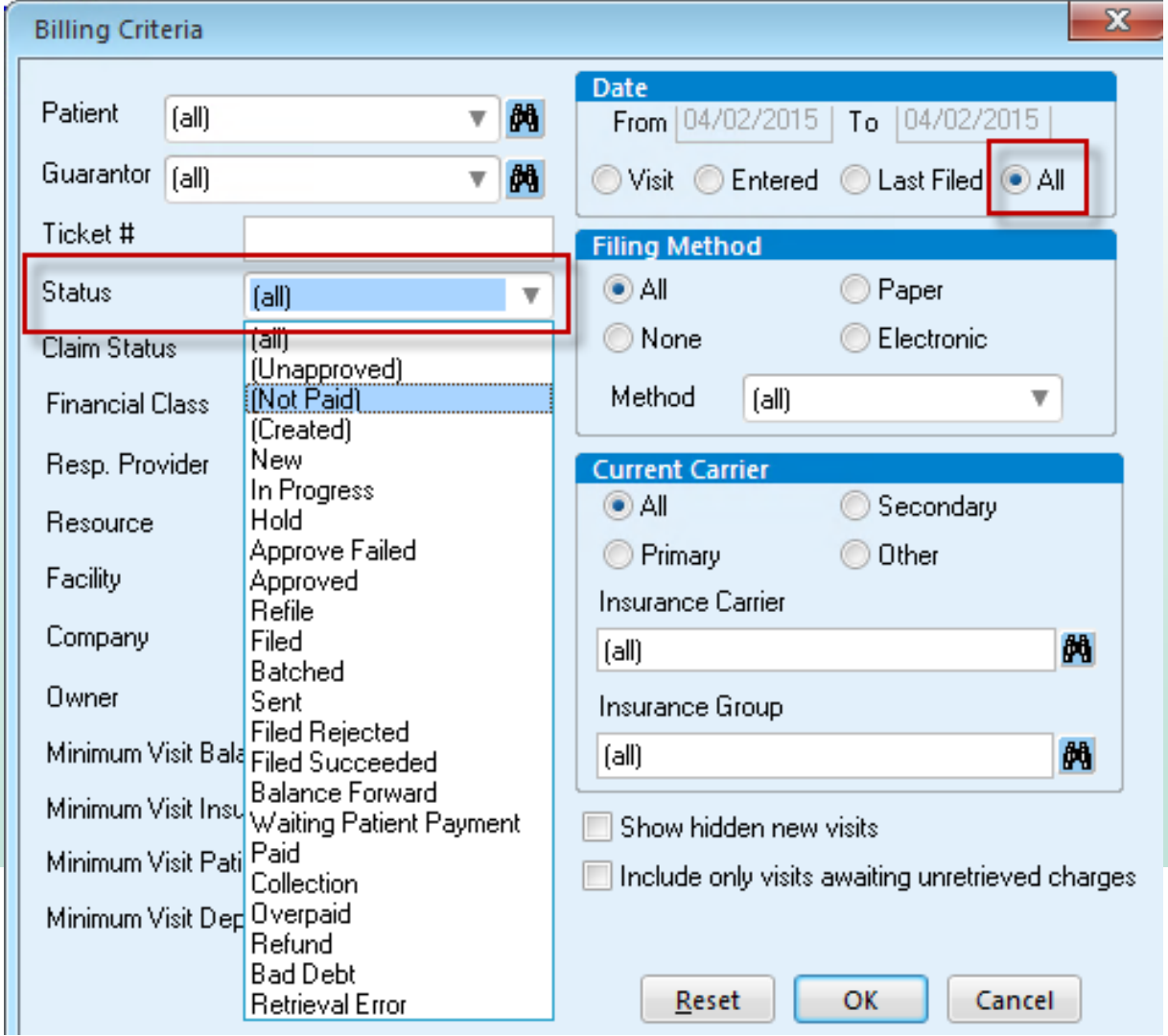




Visit Status Maintenance

- Have you Reviewed the state of Visit Statuses recently?
  - *New - older than a month*
  - *In Progress – older than last month*
  - *Approve Failed – all dates*
  - *Filed Rejected – all dates*
  - *Batched – older than a week*
  - *Sent – sent more than 2 days ago*
  - *Approved – older than a week or no last filing date*
  - *Hold – should they be on Hold?*
  - *Refile – are there any?!*
  - *Overpaid or Refund – these need to be worked*

Billing Criteria Window



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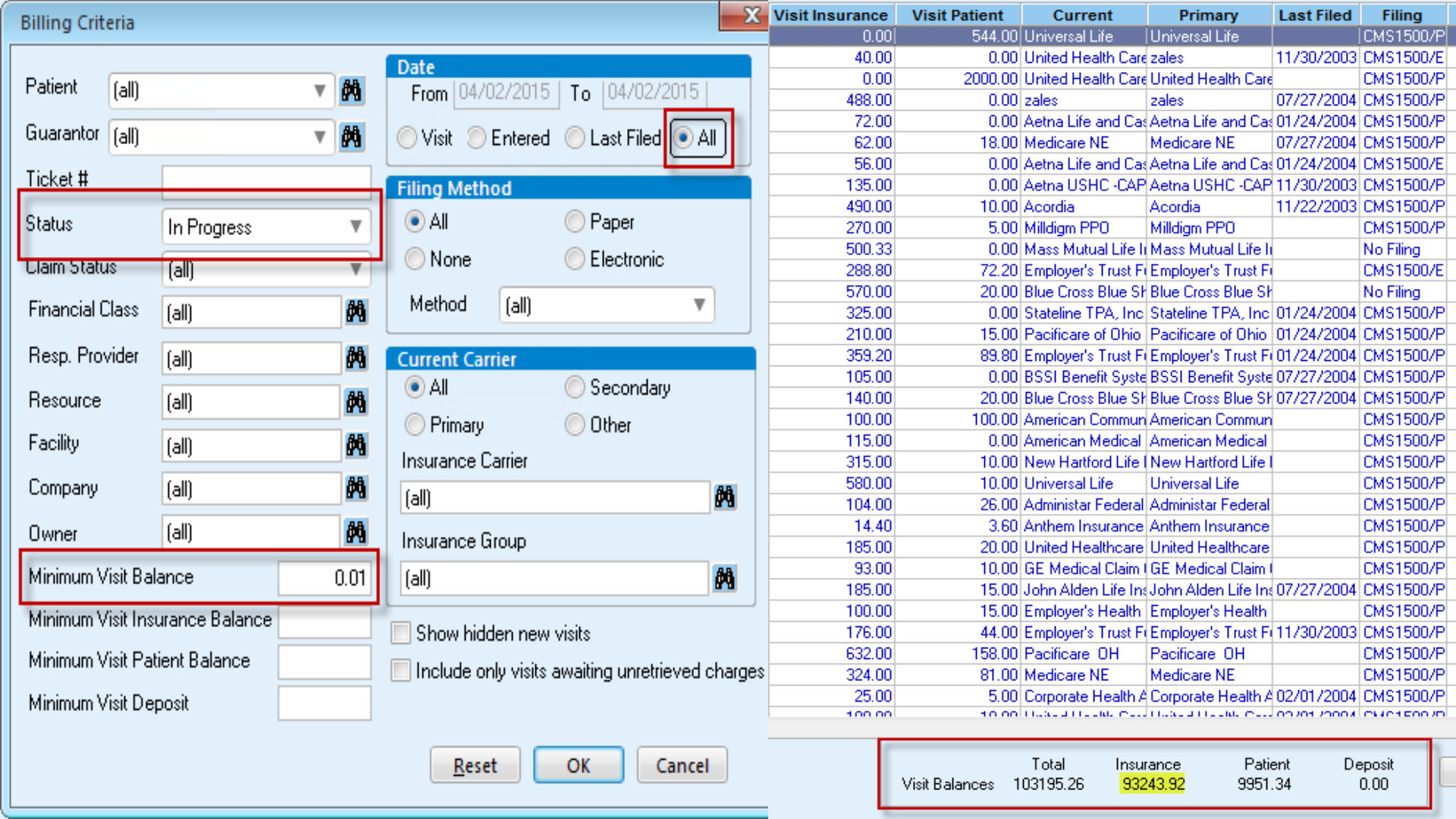
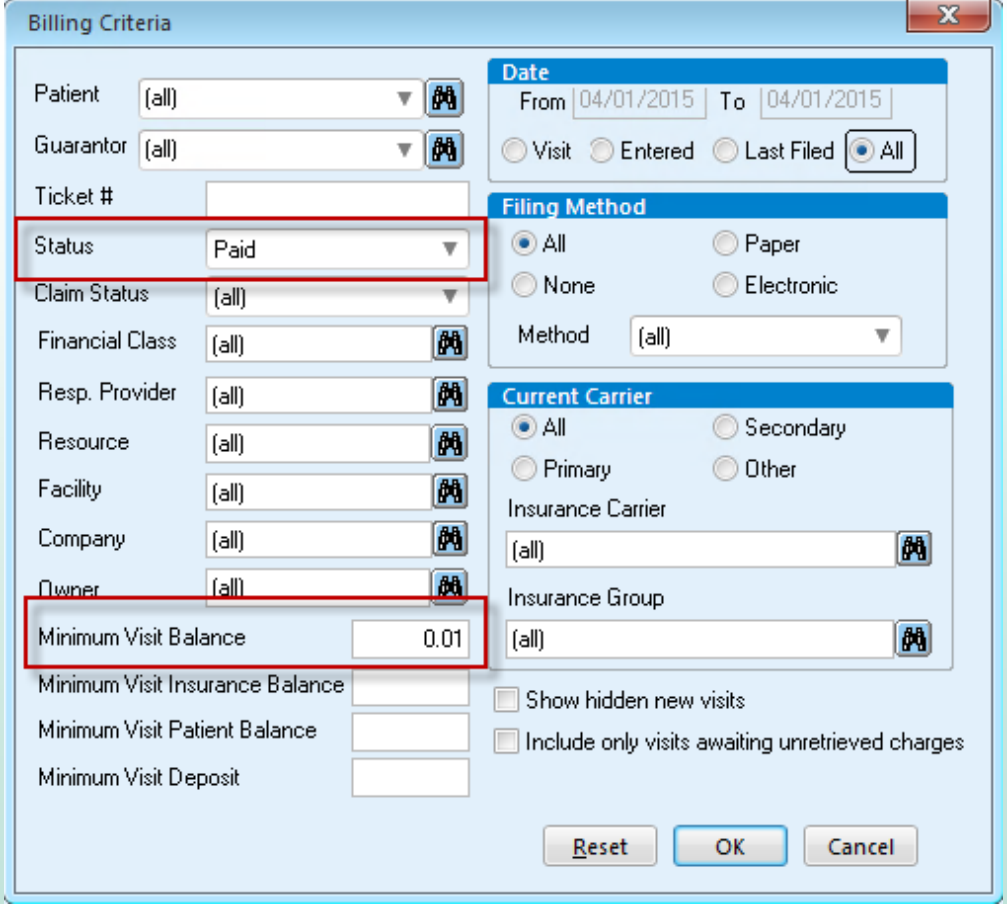

Billing Criteria
Patient (all)
Guarantor (all)
Ticket #
Status In Progress
Claim Status (all)
Financial Class (all)
Resp. Provider (all)
Resource (all)
Facility (all)
Company (all)
Owner (all)
Minimum Visit Balance 0.01
Minimum Visit Insurance Balance
Minimum Visit Patient Balance
Minimum Visit Deposit
Date
From 04/02/2015 To 04/02/2015
Visit Entered Last Filed All
Filing Method
All Paper
None Electronic
Method (all)
Current Carrier
All Secondary
Primary Other
Insurance Carrier
(all)
Insurance Group
(all)
Show hidden new visits
Include only visits awaiting unretrieved charges
Reset OK Cancel
Visit Insurance
Visit Patient
Current
Primary
Last Filed
Filing
0.00 544.00 Universal Life Universal Life CMS1500/P
40.00 0.00 United Health Care zales 11/30/2003 CMS1500/E
0.00 2000.00 United Health Care United Health Care CMS1500/P
488.00 0.00 zales zales 07/27/2004 CMS1500/P
72.00 0.00 Aetna Life and Cas Aetna Life and Cas 01/24/2004 CMS1500/P
62.00 18.00 Medicare NE Medicare NE 07/27/2004 CMS1500/P
56.00 0.00 Aetna Life and Cas Aetna Life and Cas 01/24/2004 CMS1500/E
135.00 0.00 Aetna USHC -CAP Aetna USHC -CAP 11/30/2003 CMS1500/P
490.00 10.00 Acordia Acordia 11/22/2003 CMS1500/P
270.00 5.00 Milldigm PPO Milldigm PPO CMS1500/P
500.33 0.00 Mass Mutual Life I Mass Mutual Life I No Filing
288.80 72.20 Employer's Trust F Employer's Trust F CMS1500/E
570.00 20.00 Blue Cross Blue Sh Blue Cross Blue Sh No Filing
325.00 0.00 Stateline TPA, Inc Stateline TPA, Inc 01/24/2004 CMS1500/P
210.00 15.00 Pacificare of Ohio Pacificare of Ohio 01/24/2004 CMS1500/P
359.20 89.80 Employer's Trust F Employer's Trust F 01/24/2004 CMS1500/P
105.00 0.00 BSSI Benefit Syste BSSI Benefit Syste 07/27/2004 CMS1500/P
140.00 20.00 Blue Cross Blue Sh Blue Cross Blue Sh 07/27/2004 CMS1500/P
100.00 100.00 American Commun American Commun CMS1500/P
115.00 0.00 American Medical American Medical CMS1500/P
315.00 10.00 New Hartford Life I New Hartford Life I CMS1500/P
580.00 10.00 Universal Life Universal Life CMS1500/P
104.00 26.00 Administar Federal Administar Federal CMS1500/P
14.40 3.60 Anthem Insurance Anthem Insurance CMS1500/P
185.00 20.00 United Healthcare United Healthcare CMS1500/P
93.00 10.00 GE Medical Claim GE Medical Claim CMS1500/P
185.00 15.00 John Alden Life Ins John Alden Life Ins 07/27/2004 CMS1500/P
100.00 15.00 Employer's Health Employer's Health CMS1500/P
176.00 44.00 Employer's Trust F Employer's Trust F 11/30/2003 CMS1500/P
632.00 158.00 Pacificare OH Pacificare OH CMS1500/P
324.00 81.00 Medicare NE Medicare NE CMS1500/P
25.00 5.00 Corporate Health A Corporate Health A 02/01/2004 CMS1500/P
Total Insurance Patient Deposit
Visit Balances 103195.26 93243.92 9951.34 0.00

Paid Visit Status Review

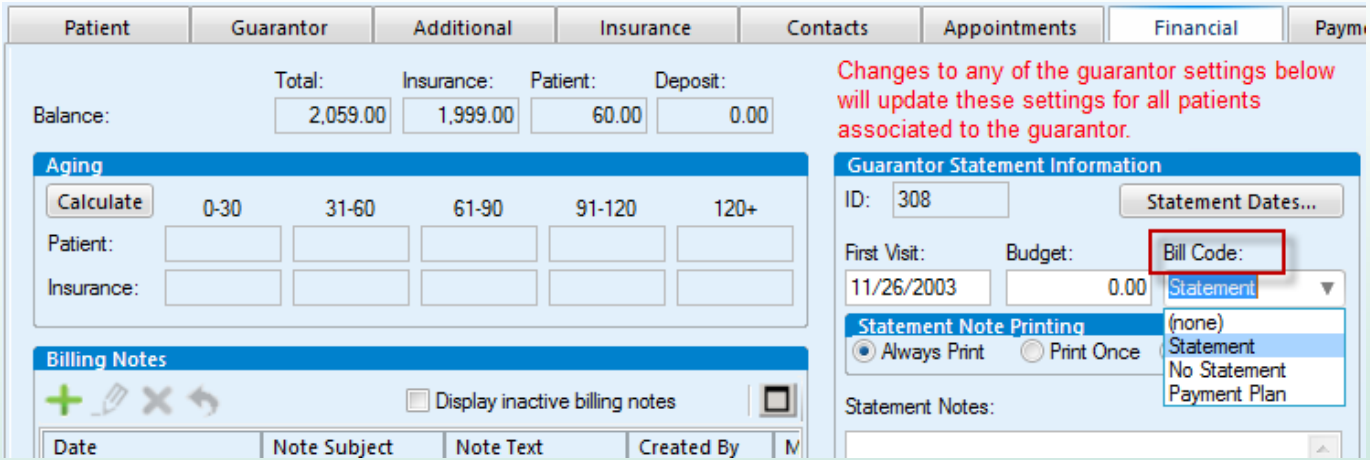
- Are there any visits in a Status of Paid with a balance?
  - *Why important?*
- Billing>Status- Paid> Minimum Balance field criteria



Patient Statements

- Are there patients with a balance who have not received a Statement?
- Bill Code
- Criteria review

- Bill Code in Registration



- Value Pack Bill Code Report

Bill Code Report

All Facilities
All Doctors
No Statement

Patient Id	GuarantorName	Description	Total Ins Bal	Total Pat. Bal
AETNA	CapPlanOffsetAccount Aetna	No Statement	$0.00	$0.00
339	David Shaw	No Statement	$0.00	$0.00

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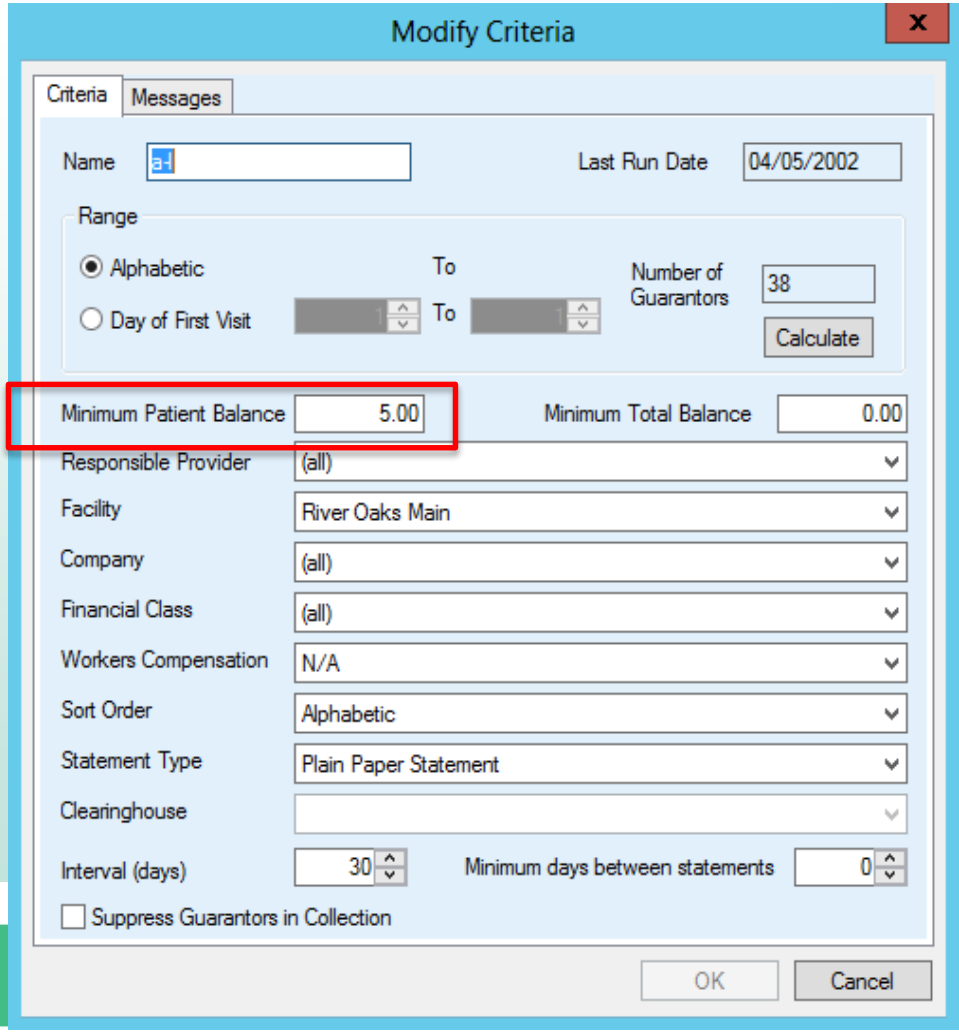
Statement Criteria

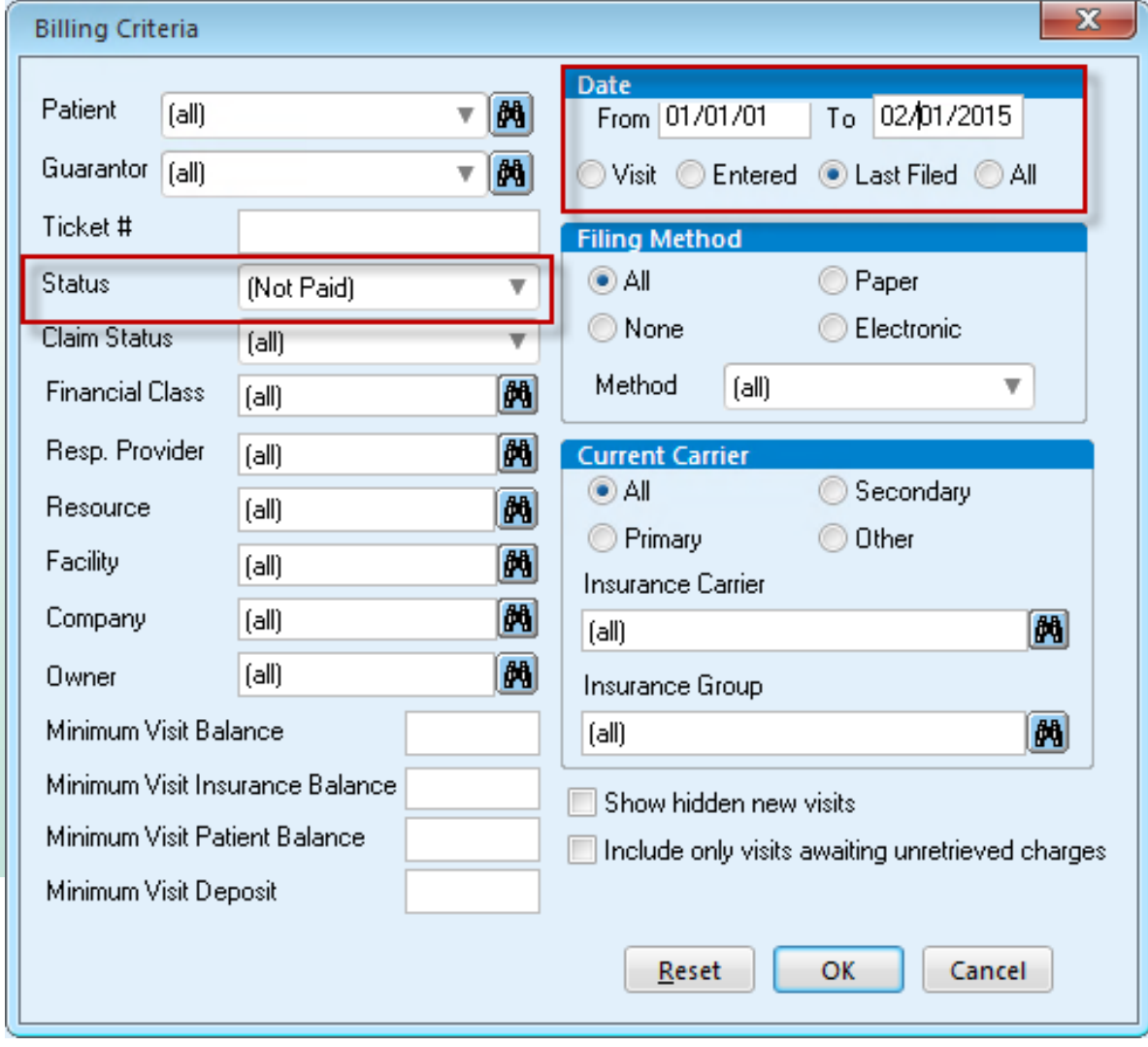
- Review Minimum Patient Balance amount and other fields to make sure everything is included



Accounts Receivables Review

- What is in your +120 day AR?
  - *Can you identify a trend? A carrier that doesn't pay?*

Billing> Minimum Balance > last filed date



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Aging by Financial Class

	Deposits	0 to 30	31 to 60	61 to 90	91 to 120	120+	Totals
Patient							
Insurance							
Totals							

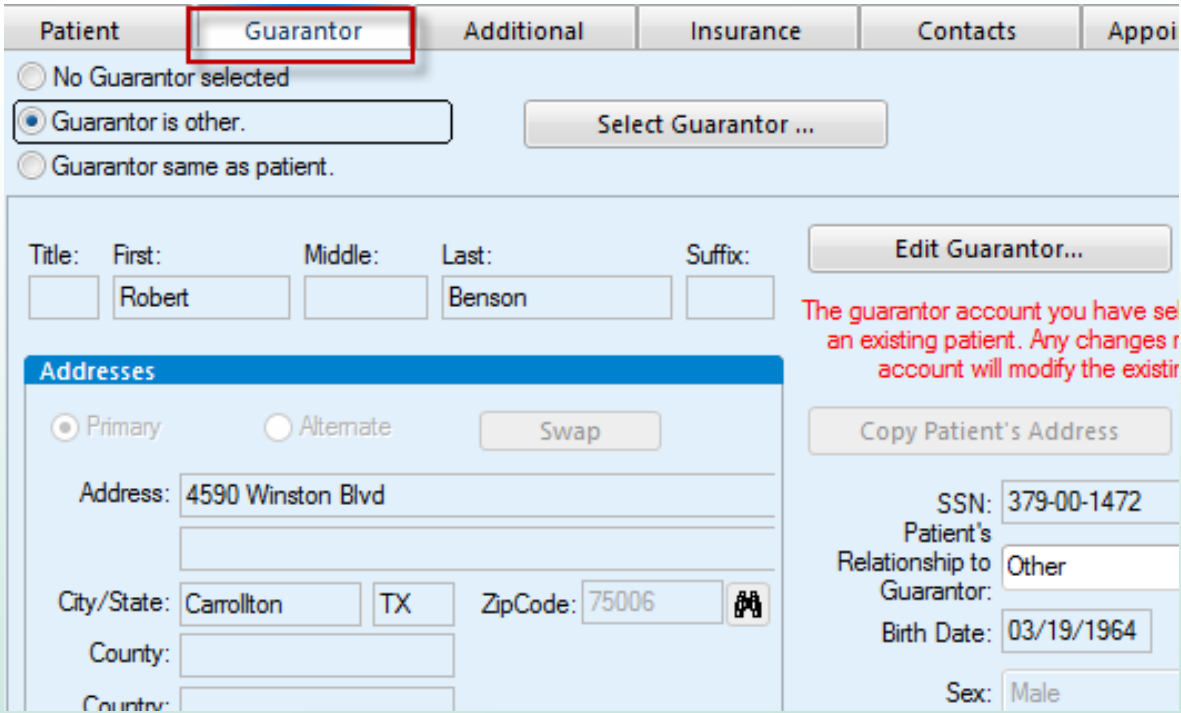
- *See how your aging looks overall*
- *Then look at the top 3 highest AR balances by Financial Class*
  - *Run by Date of Entry from the "beginning of time" through the previous month*

Other Financial Reports

- Monthly Financial Summary
- Adjustments
  - *Compare year to date and previous year to date*

Guarantors

- Are there Duplicate Guarantors in your database?
- Reports>Value Pack > Admin> Duplicate Guarantors



Duplicate Guarantor

Duplicate First and Last Names

Guarantor 1		Guarantor 2	
Name	SSN	Name	SSN
Olson,Bradley	555-23-2123	Olson,Bradley	555-23-2123
Olson,Bradley	555-23-2123	Olson,Bradley	555-23-2123

Patients without Guarantors

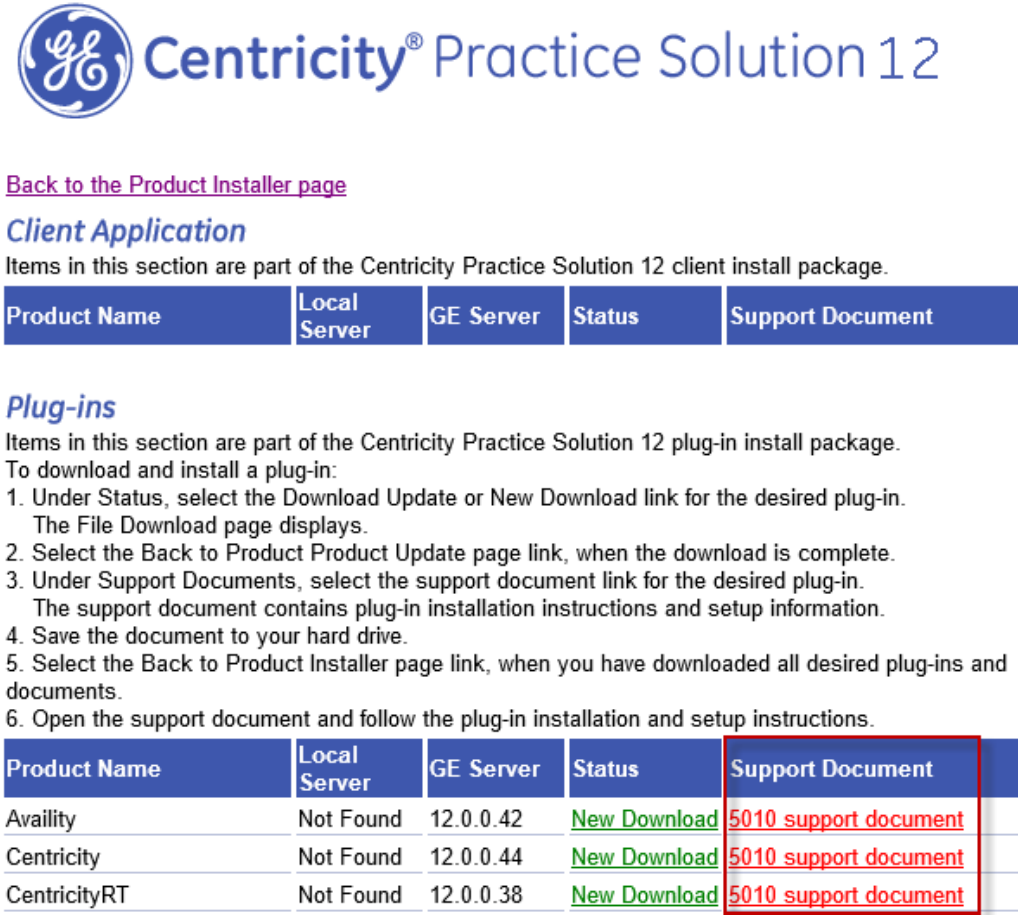
- Reports> Value Pack >Admin >

Patients without Guarantors

PatientId	Last	First	SSN	DOB	Date Created
775	TREADWAY	ADAM		09/01/2001	03/31/2015

EDI

- Do you have the latest EDI Plug In?
  - *Have you reviewed the Release Notes for the plug-in?*
- Product Updates page
  - *Must be installed on all computers that create and send Claim files, process Remit files, and/or create and process Eligibility files*
  - *If you have a custom plug-in, contact your VAR or GE Support Services*



Centricity® Practice Solution 12

Back to the Product Installer page

Client Application

Items in this section are part of the Centricity Practice Solution 12 client install package.

Product Name	Local Server	GE Server	Status	Support Document

Plug-ins

Items in this section are part of the Centricity Practice Solution 12 plug-in install package.
To download and install a plug-in:
1. Under Status, select the Download Update or New Download link for the desired plug-in. The File Download page displays.
2. Select the Back to Product Product Update page link, when the download is complete.
3. Under Support Documents, select the support document link for the desired plug-in. The support document contains plug-in installation instructions and setup information.
4. Save the document to your hard drive.
5. Select the Back to Product Installer page link, when you have downloaded all desired plug-ins and documents.
6. Open the support document and follow the plug-in installation and setup instructions.

Product Name	Local Server	GE Server	Status	Support Document
Availity	Not Found	12.0.0.42	New Download	5010 support document
Centricity	Not Found	12.0.0.44	New Download	5010 support document
CentricityRT	Not Found	12.0.0.38	New Download	5010 support document

Codes Check

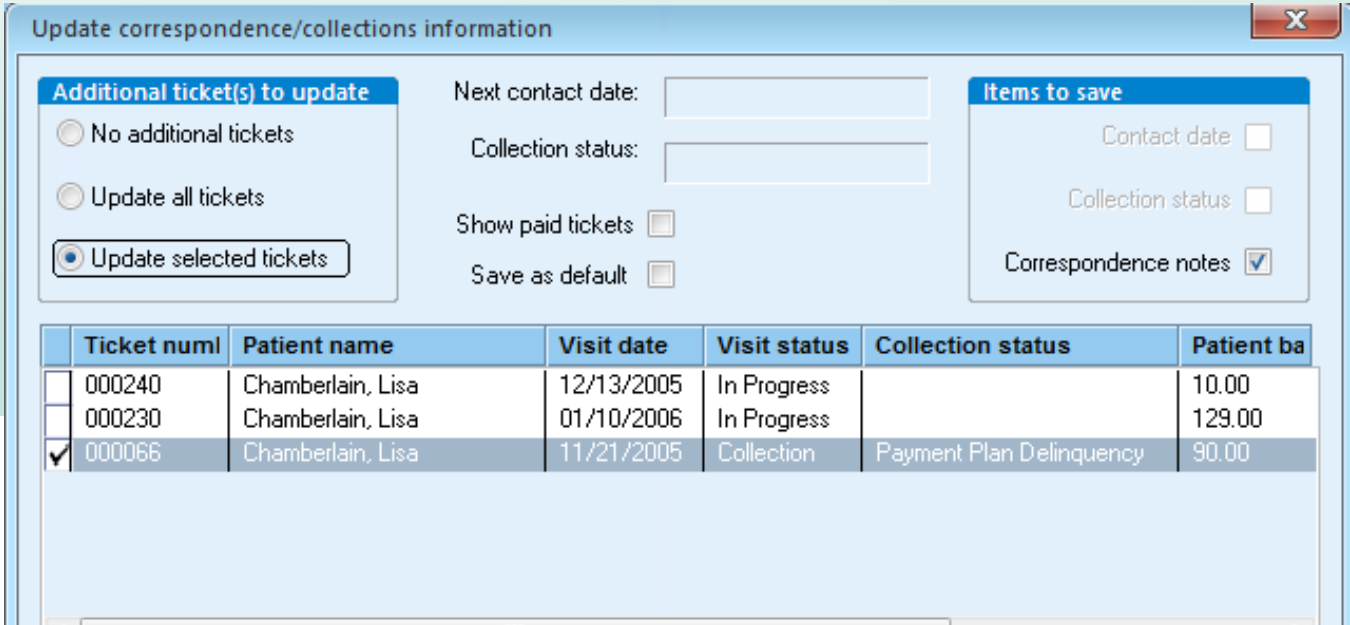
- Are your CPT & ICD Codes up to date?
  - *engage.gehealthcare.com*
  - *Contact your VAR or GE Support Services*

Recalls

- Are there unresolved Recalls in your system?
- Reports> Patients> Recalls

Collections Settings

- Are you using the Guarantor Based Collection Letter option?
  - *Copy notes and Collection Status from one Visit to many*



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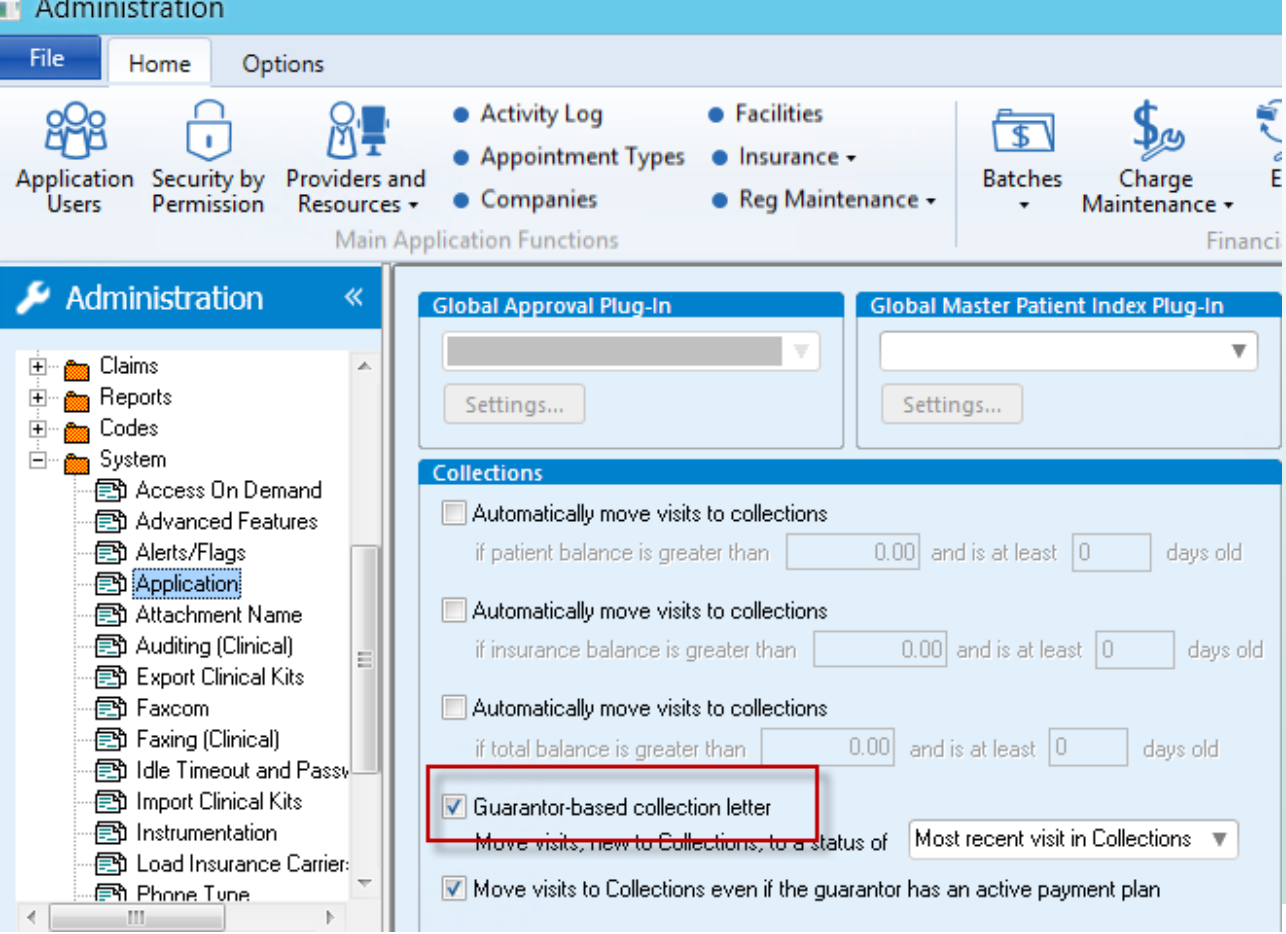
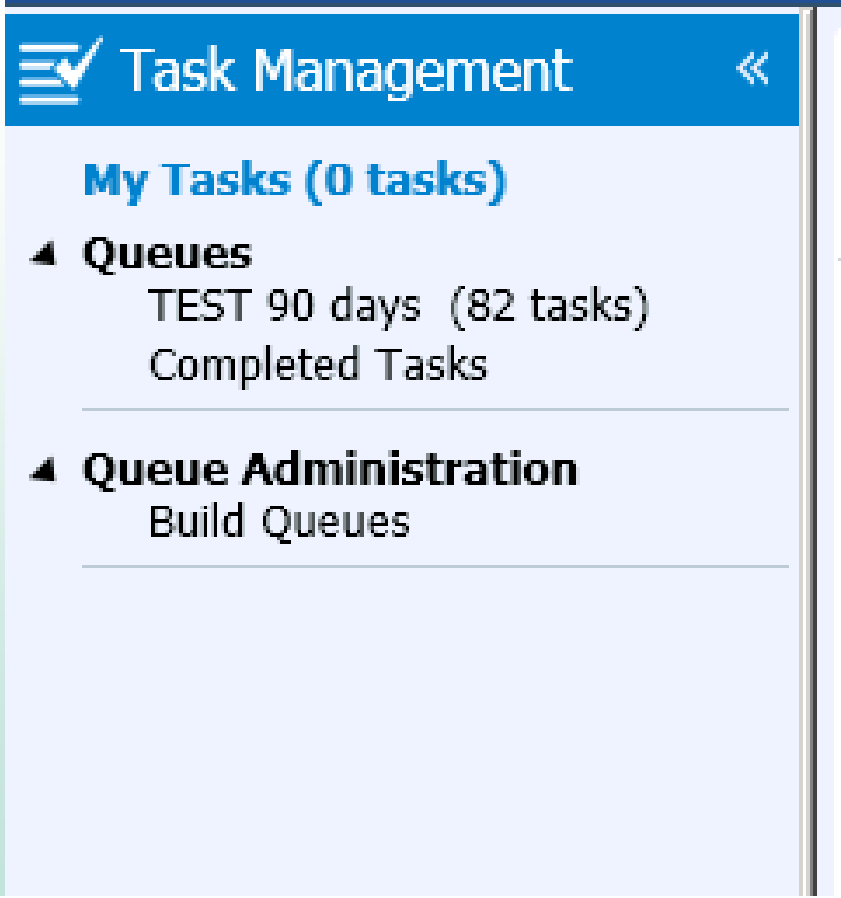


- Administration> System> Application> Guarantor Based Collection Letter

Task Management

- Are your staff regularly managing their queue(s)?



Task Management Reports

- Queue Volume
  - *Summary queue information*
    - *Number of tasks*
    - *Average number of days assigned*
    - *Total visit balance*

Financial Health Check Points

- Is your Closing Date set and set regularly?
- Have you Reviewed the state of Visit Statuses recently?
- Are there any Paid visits with a balance?
- Are there patents with a balance who have not received a Statement in the last 45 days?
- What is in your +120 day AR?
- What are your top 3 highest balances by Financial Class?

Financial Health Check Points

- Do you have the latest EDI Plug In?
- Are your CPT & ICD Codes up to date?
- Are there unresolved Recalls?
- Are there Duplicate Guarantors in your database?
- Are you using the Guarantor Based Collection Letter option?
- Are your staff managing their Task Management queues?

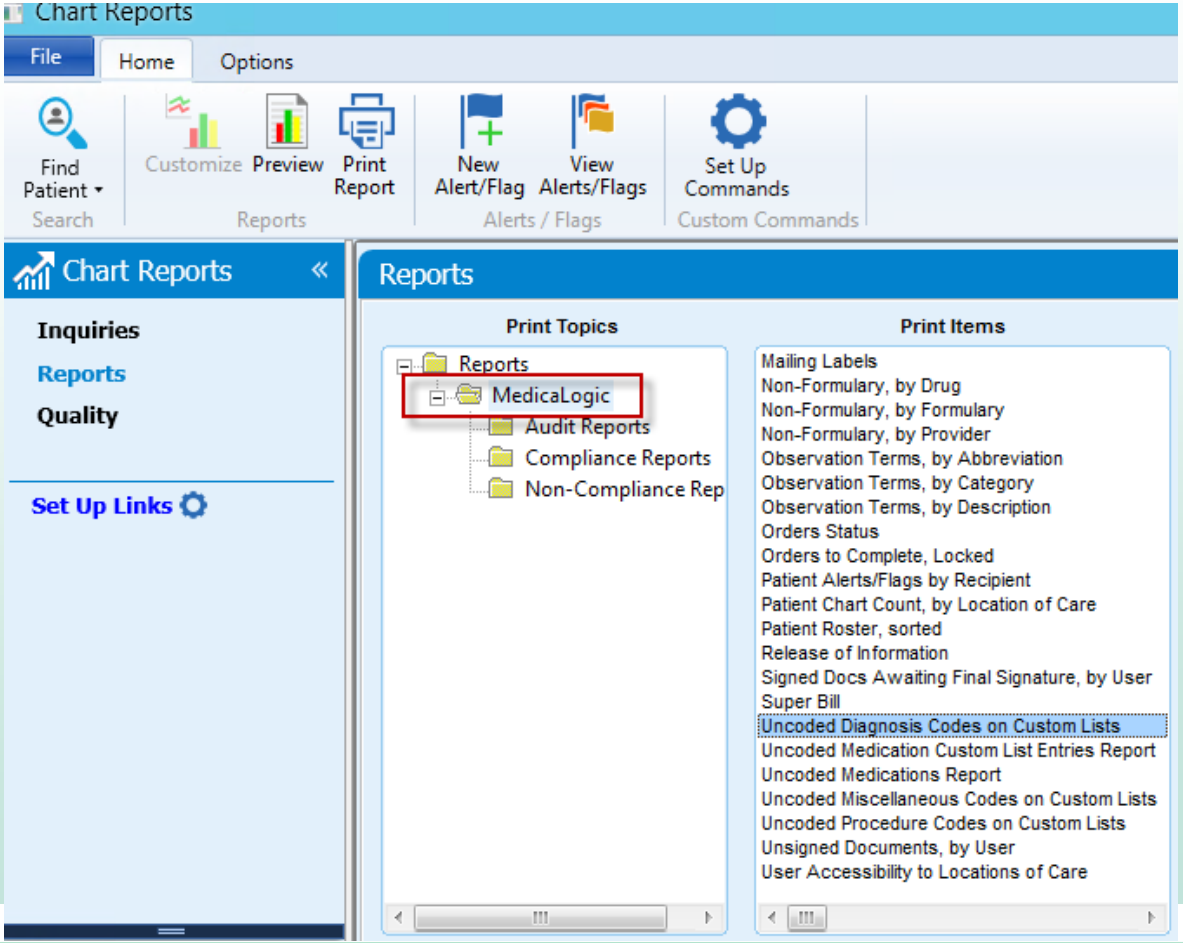
Chart Component Tune Up

Un-coded Items

- Are there Un-coded Problems on your Custom Lists?

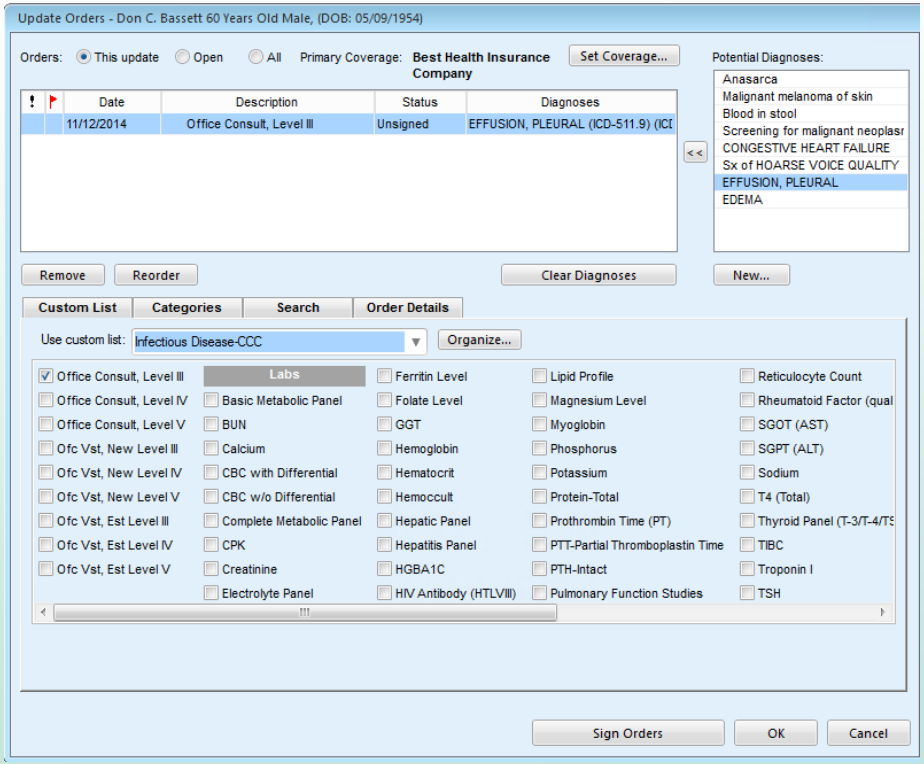
- Prep for ICD-10
  - *Do you have ICD-9 codes that don't have a corresponding ICD-10 code?*

Chart> Quality > Reports>
MedicaLogic> Un-coded



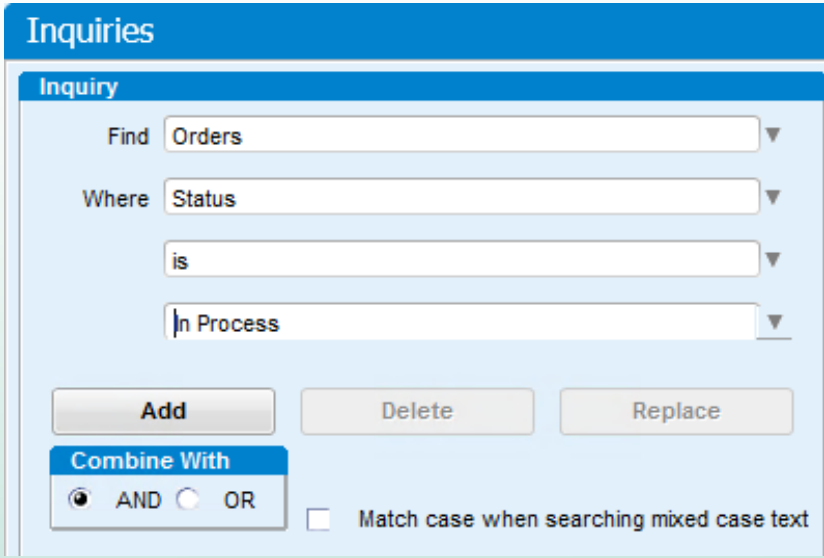
Orders Management

- Maintain Custom Lists



Orders Management

- How are Orders managed?
  - *What is In Process or on Admin Hold?*
- Chart>Reports & Quality> Inquiry
  - *Find Orders based on Status, Type, Date*



Updates from GE

- Are the Knowledgebase, OBS Terms and Service Pack updates regularly installed?
  - *MediSpan Updates*
  - *Updates to medications and codes (ICD and CPT)*
  - *Most current OBS terms for form development*
  - *Done while users out for a short time*
  - *Typically Monthly and Quarterly*
  - *You may do these yourself or you may have an arrangement with your Value Added Reseller or GE Support Services.*

LinkLogic

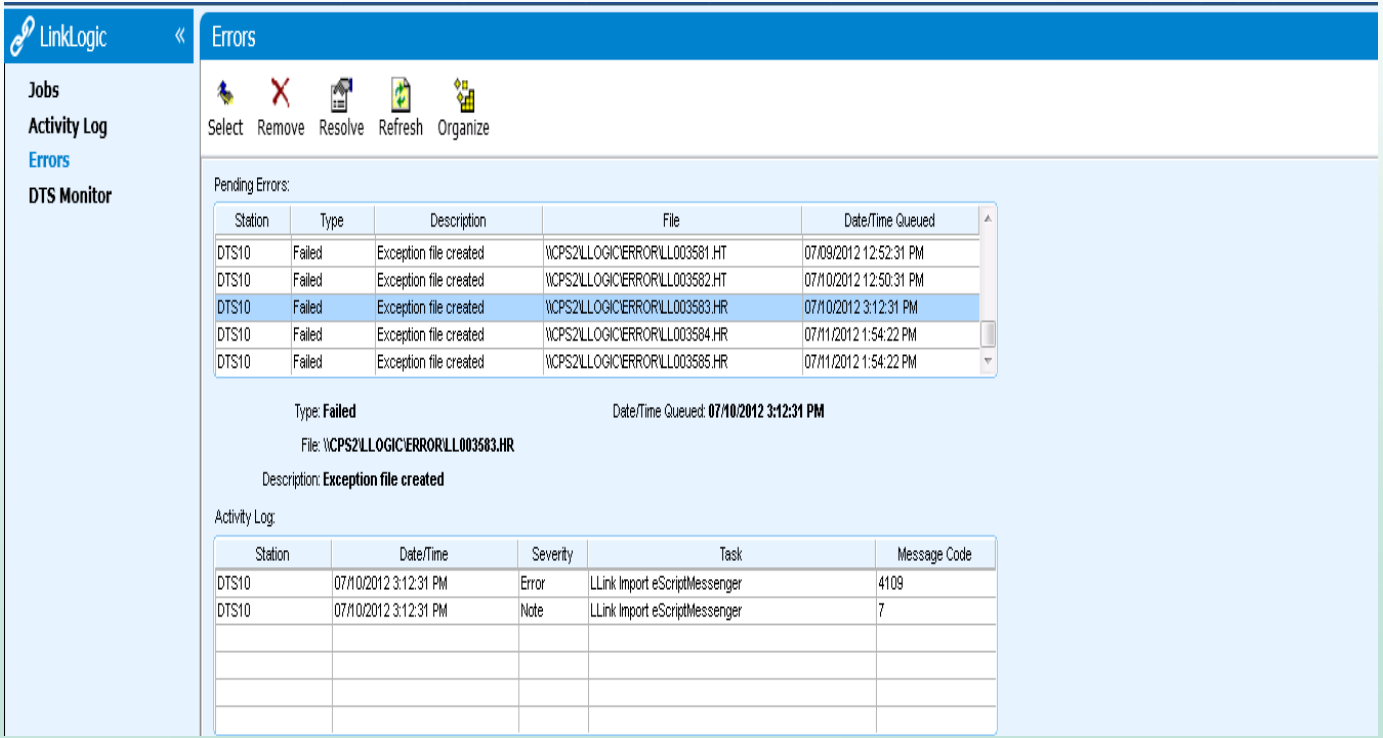
- Do you have an identified LinkLogic Manager?

- Do they regularly check LinkLogic Errors and Jobs?

- Accessing LinkLogic from the chart component

Links

- Jobs
- Activity Log
- Errors
- DTS Monitor



Document Management

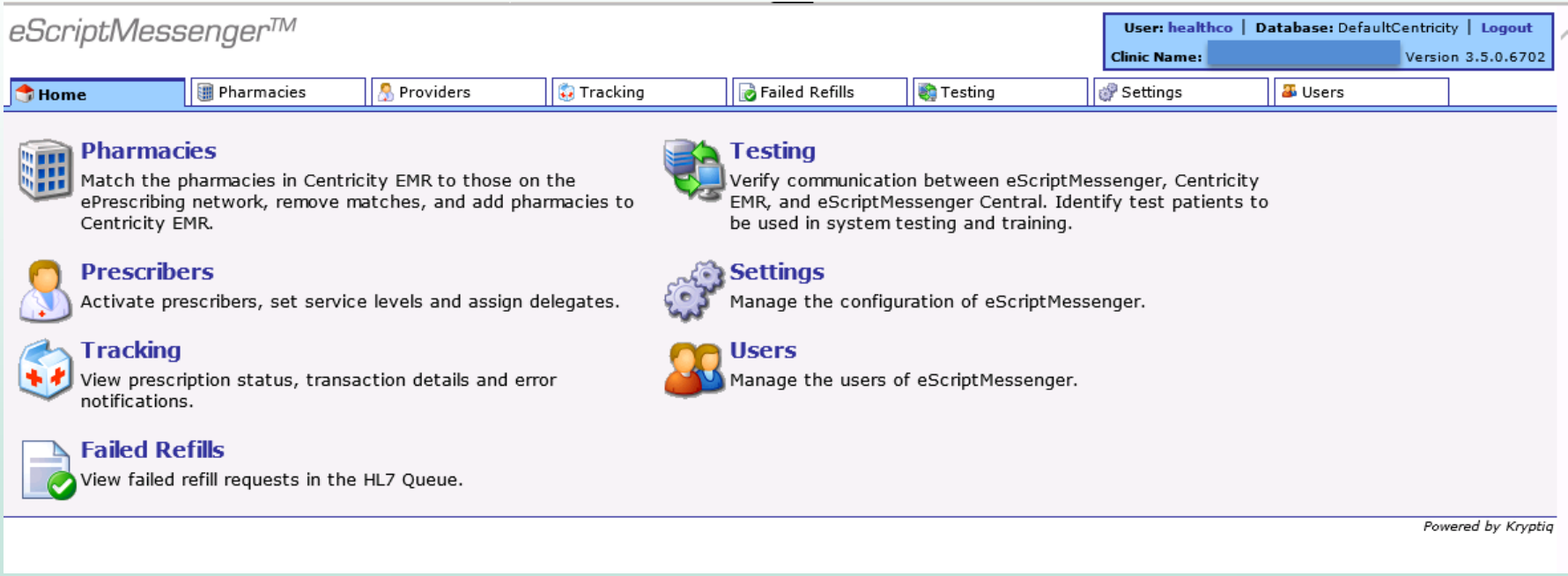
- Does your scanning and indexing solution Document Types match your current EMR Document Types?

- Administration> Chart Documents> Clinical Document Types

eScripts Messenger

- When did you last check eSM failures in the eSM Console?
- eSM Console> Tracking > Error Messages
  - *Failed Refills*
  - *Message queue*
- Are your eSM Manager and Delegates current staff?
- eSM console> Prescribers > Delegates

eScripts Messenger



CQR Dashboard

- Is your data being Ingested?
- Do you have patients on your unmet list that shouldn’t be?

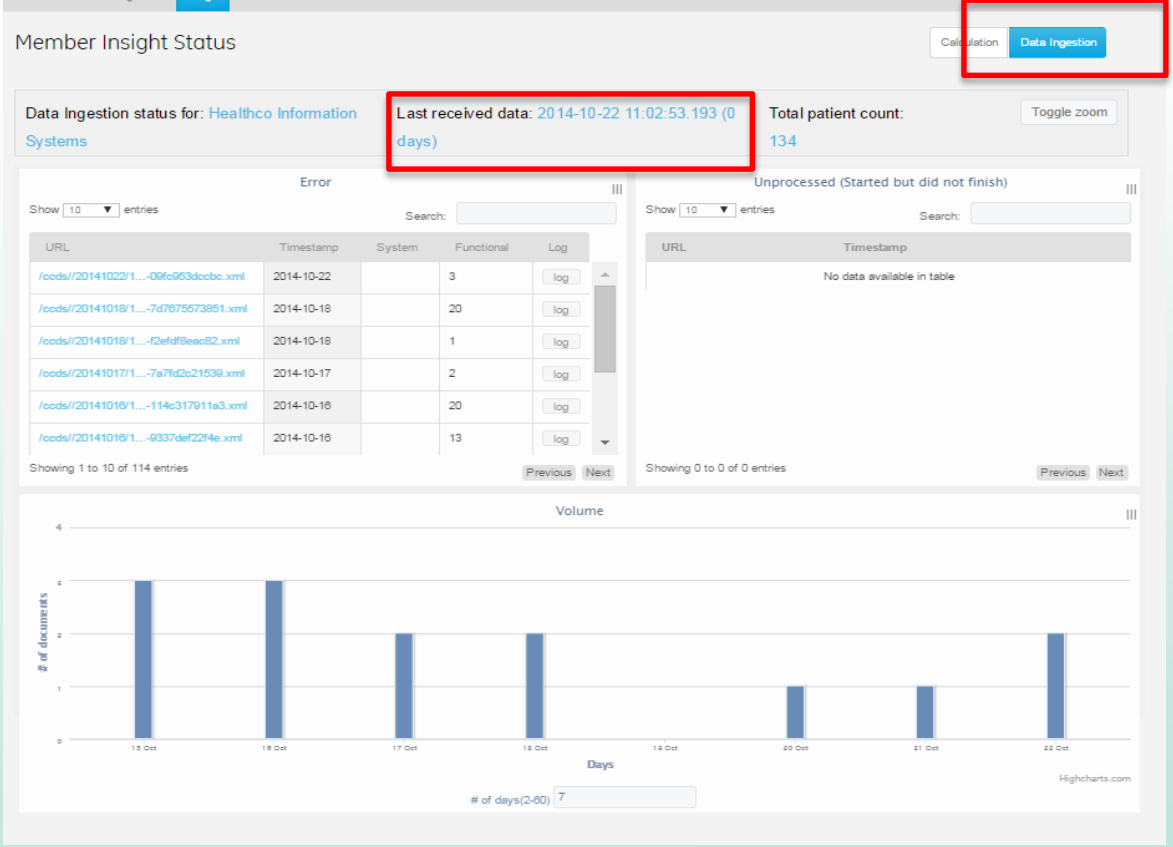

Member Insight Status
Calculation
Data Ingestion
Data Ingestion status for: Healthco Information Systems
Last received data: 2014-10-22 11:02:53.193 (0 days)
Total patient count: 134
Toggle zoom
Error
Show 10 entries
Search:
URL
Timestamp
System
Functional
Log
/cods//20141022/1...-09fc953dccbc.xml 2014-10-22 3 log
/cods//20141018/1...-7d7675573851.xml 2014-10-18 20 log
/cods//20141018/1...-f2efdf8eac82.xml 2014-10-18 1 log
/cods//20141017/1...-7a7fd2c21539.xml 2014-10-17 2 log
/cods//20141016/1...-114c317911a3.xml 2014-10-16 20 log
/cods//20141016/1...-9337def22f4e.xml 2014-10-16 13 log
Showing 1 to 10 of 114 entries
Previous
Next
Unprocessed (Started but did not finish)
Show 10 entries
Search:
URL
Timestamp
No data available in table
Showing 0 to 0 of 0 entries
Previous
Next
Volume
# of documents
Days
15 Oct
16 Oct
17 Oct
18 Oct
19 Oct
20 Oct
21 Oct
22 Oct
Highcharts.com
# of days(2-60) 7

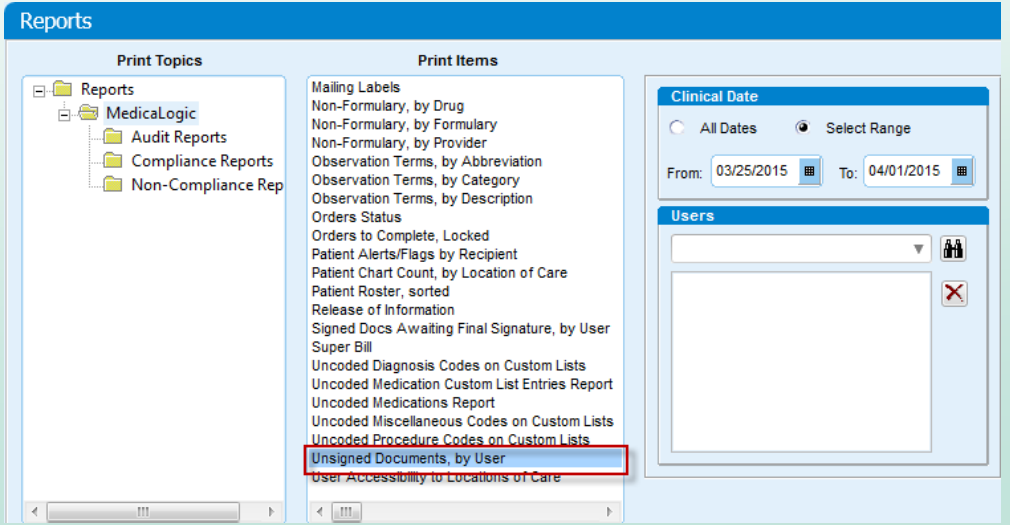
Chart Check Up Review

- Coding – Problem List ICD Codes
- Orders Procedure Codes
- Link Logic Management
- eSM Management
- CQR

Bonus Points for your Check up

- When did you last do a Security Review?
  - *Are Active Directory Users accounts current, and is Centricity Security used?*
- Are you taking advantage of the training opportunities available to you?
  - *http://centricityportal.gen21.com/knav/nav*

- Have you checked your Unsigned Documents count?
  - *Performance impact*
  - *Meaningful use reporting*



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Keep Centricity tuned and running smoothly

What do you do to keep Centricity tuned?

Questions?