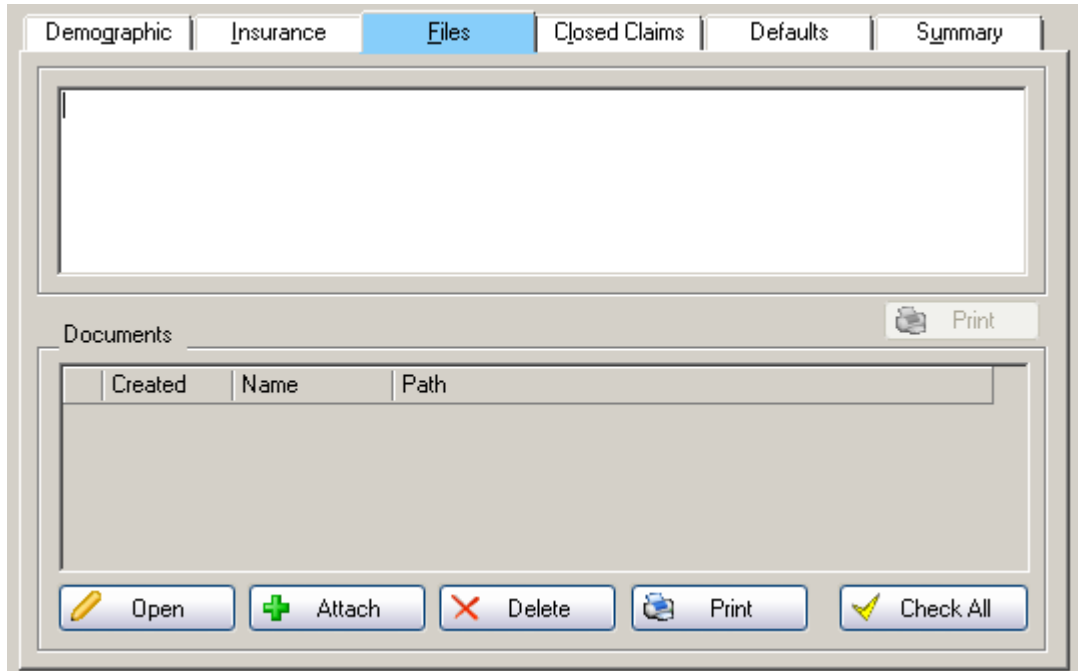


6B. WORKING WITHIN AN EXISTING PATIENT RECORD

1. Adding Files to a Patient Record



When you click on the **Files Tab** from within the **Patient Record**, you will find a **Free Notes** which is used to insert your own notes (such as collection notes, or other general information), and a section titled “**Documents**” whereby you can attach scanned pictures or documents to go along with the record.

We will discuss both sections below:

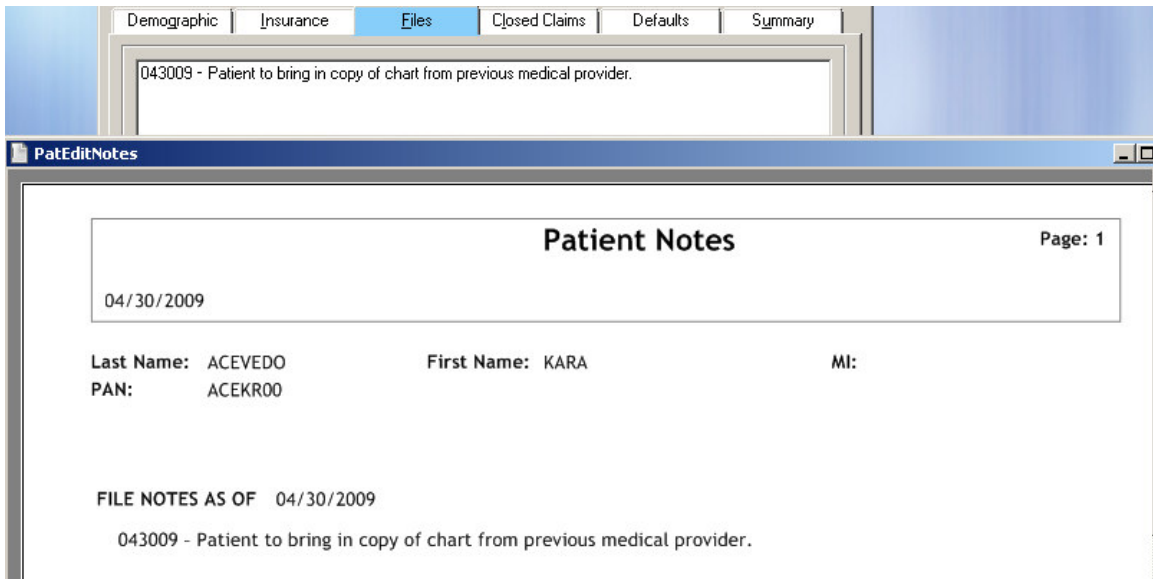
(A) Free Notes Section (Blank Area)

You can use this section to enter a note into the account (such as a collection note or a short recap as to what may be going on with the account). The width of this section is 79 characters long; however, once the end of the blank area is reached, the note will automatically wrap around to the next line. Your note should be preceded by a date as in the following example:

043009 – Patient to bring in copy of chart from previous medical provider.

To print a copy of notes in this section, click on the **Print** button on the far right hand side.

Here is an example of how the note in the account would look like and how the printed version would appear as:



When done entering the note, click on the **Save** button at the bottom of the screen to bring you back to the **Patients Data** screen (containing the names of all of your Patients).

By putting a note like the one above, the **NOTES** column in the **Patients Data** screen will contain a check mark in it signifying that there is a note under the **Files Tab** for this Patient (as shown below):

PAN	Last Name	First Name	Birthday	Provider	Primary	Secondary	Tertiary	Independent	Co-Pay	Notes
ACEK	ACEVEDO	KARA	06/02/1992	RDB	1199	ATL		1199		<input checked="" type="checkbox"/>

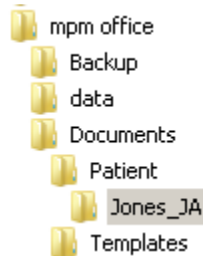
(B) Documents

Note: You must have purchased the “Document Creator” feature to be able to use this part of the software.

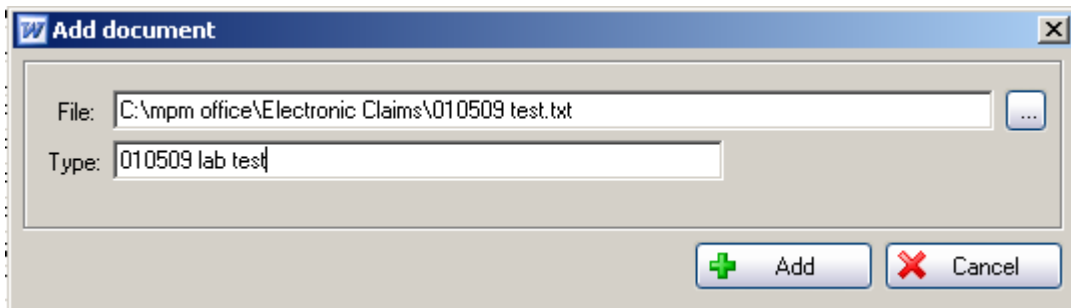
The bottom section of the Files Tab within the Patient Record allows you to attach documents of different types (for example: a Word document, an Excel spreadsheet, a scanned photo, or a scanned lab result, etc.) to the Patient Record.

A. Attaching a Document to the Patient Record

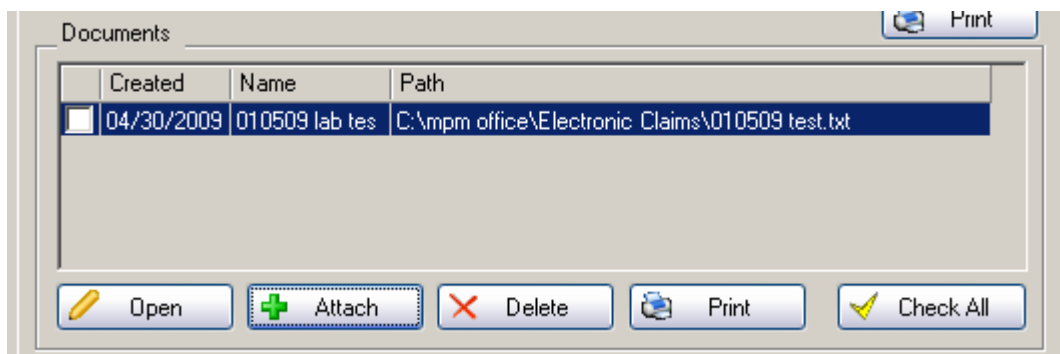
Before attaching a document to the Patient Record, you should have the document saved to a folder on your computer labeled with the Patient Name. This folder should be located in the **Patient** folder which is located in the **Documents** folder in the **Shared MPM Office** folders on the **Host Computer**.



- (a) Click on the “**Attach**” button to open a window labeled “**Add Document**”.
- (b) In the field labeled **File**, click the browser button (...) at the far right to open the “**Select File**” window from which to find and select the file or document you want to attach. Once found, double-click on the file or document to add it into the “**File**” field.
- (c) In the field labeled **Type**, enter a short description for what type of document this is (for example: lab results, pictures of illness, Consult Report, etc.).



- (d) Click the “**Add**” button when done.



B. Sorting added Documents

You can sort the added documents by left clicking on each of the **column names** to sort them in order of least to greatest or greatest to least.

C. Opening an added Document

You can **open** an added document by left clicking in the box to the left of the attached document you want to view, and then clicking on the “**Open**” button at the bottom of the screen. To select multiple documents at one time, click the “**Check All**” button at the bottom right hand side of the screen.

D. Deleting an added Document

You can **delete** an added document by left clicking in the box to the left of the attached document you want to delete, and then clicking on the “**Delete**” button at the bottom of the screen. Confirm that you want to delete the attached document by clicking “**Yes**” in the “**Delete Document**” window. To select multiple documents at one time, click the “**Check All**” button at the bottom right hand side of the screen.

Note: Deleting an attached document only removes it from the Patient Record. It does not delete it from where you initially saved it on your computer.

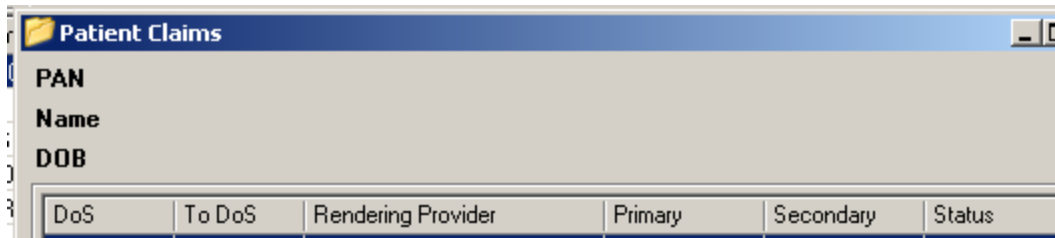
E. Printing an added Document

You can **print** an added document by left clicking in the box to the left of the attached document you want to print, and then clicking on the “**Print**” button at the bottom of the screen. To select multiple documents at one time, click the “**Check All**” button at the bottom right hand side of the screen.

2. Working with Recorded Transactions

By clicking on the **Transactions** button at the top of the **Patient Record** you will be able to view all the recorded transactions that have taken place since you first began with this record. The opened **Transactions** screen (labeled “**Patient Claims**”) will show you the Patient Account Number (**PAN**), the Patient’s Name (**NAME**), and their date of birth (**DOB**).

It will also show you the **From** and **To Dates of Service**, the **Rendering Provider**, the **Primary** and **Secondary** insurances, and the **Status (Open or Closed)** for each claim.



(a) Viewing the Transactions

To **view** the transactions associated with a claim, left click on a claim to highlight it and click the **Open** button on the bottom left side of this screen. You can also double-click on the claim to open it. The opened screen will be labeled **Transactions**.

(b) Adding a Transaction

Although **not recommended** to do so via this screen, you can **add a transaction** to those already shown by clicking on the **ADD** button and in the opened "**Edit Pays and Bills**" screen, fill in the blanks as necessary (refer to the **section** titled "**PAYMENTS AND ADJUSTMENTS**" for additional instructions).

When done, click on the "**Save**" button to return to the "**Transactions**" screen, and then the "**Close**" button on the "**Edit Pays and Bills**" screen, followed by the "**Close**" button on the "**Patient Claims**" screen to return to the "**Edit Patient Data**" screen.

(c) Editing a Transaction

To **edit** an existing Transaction, find the transaction you want to edit, left click on it to highlight it, and then click on the "**Edit**" button at the bottom of the screen. You can also double-click on the transaction to open it. In the opened "**Edit Pays and Bills**" screen, edit the areas as necessary (refer to the **section** titled "**PAYMENTS AND ADJUSTMENTS**" for additional instructions).

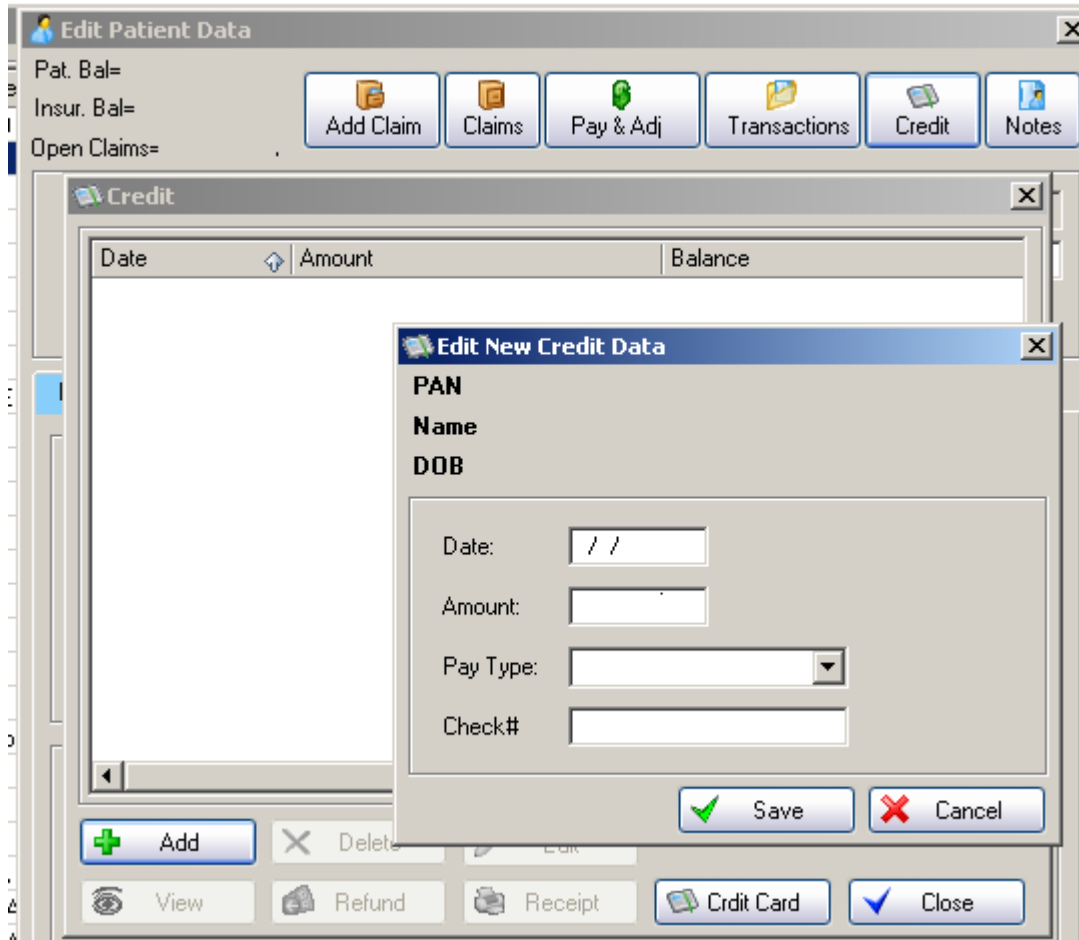
When done, click on the "**Save**" button to return to the "**Transactions**" screen, and then the "**Close**" button on the "**Edit Pays and Bills**" screen, followed by the "**Close**" button on the "**Patient Claims**" screen to return to the "**Edit Patient Data**" screen.

(d) Deleting a Transaction

To **delete** an existing Transaction, find the transaction you want to delete, left click on it to highlight it, and then click on the "**Delete**" button at the bottom of the screen. Click on the "**Yes**" button when asked "**Delete Item?**" if you are certain that you want to delete this transaction.

When done, click on the “**Close**” button to return to the “**Patient Claims**” screen, and then the “**Close**” button on the “**Patient Claims**” screen to return to the “**Edit Patient Data**” screen.

3. Entering a Credit or Collected Co-payment



The MPM Office program **will not** let you apply monies collected without a charge to post it against. In order to do so, you must use the **Credit** option button as a placeholder for monies collected in advance of a service (such as a co-payment being paid prior to the visit, or a deposit on a cosmetic surgery).

The following is just a **brief overview**. For **specific detailed instructions**, please refer to the section titled “**PAYMENTS AND ADJUSTMENTS**”.

(a) From the opened **Edit Patient Data** screen, click on the **Credit** button at far left top portion of the screen.

(b) In the opened **Credit** screen, click the **ADD** button and in the opened **Edit New Credit Data** screen, proceed to enter the **Date** the payment was received, the **Amount** of

the payment (no \$ sign needed), select the **Pay Type (Cash, Check, Credit Card)**, and enter the **Check #** in the fields provided. Click the **SAVE** button when done to return you to the opened Credit screen.

For information on posting the collected monies against the charges, or printing a receipt, etc., please refer to the section titled “**PAYMENTS AND ADJUSTMENTS**”.

4. Adding SOAP Notes (EMR – Electronic Medical Record)

The MPM Office program allows you to maintain electronic chart notes for each Patient helping your office save the environment. For complete information as to how to take advantage of creating electronic medical records by adding different types of **Notes** to the **Patient Record**, please refer to the section titled “**USING THE NOTES FEATURE**”.

5. Understanding the Summary Screen

Demographic	Insurance	Files	Closed Claims	Defaults	Summary
Billed					
Patient	0.00	Total	300.00		
Amount Due					
Primary	210.17	Patient	0.00		
Secondary	0.00	Co-Pay	-50.00		
Visits					
Number of Visits	3	First Visit	11/26/2008	Last Visit	04/28/2009
Floating Credit					
Floating Credit	0.00	Number of Cancellations	0		

The information found under the **Summary** Tab allows you to see at a glance the history your office has with this Patient. Each of the four sections are described below:

Billed: This area shows you how much total was billed from the first time you saw this Patient through today, but only after the claims have been printed or electronically sent, and after the Patient Statement has been generated:

- a) **Patient:** This is the amount billed to the Patient to date.
- b) **Total:** This is the amount billed in total to date.

Amount Due: This area shows you how much total is due and from whom as of today, but only after the claims have been printed or electronically sent, and after the Patient Statement has been generated:

- a) **Primary:** This is the amount due by the Patient's Primary Insurance.
- b) **Secondary:** This is the amount due by the Patient's Secondary Insurance.
- c) **Patient:** This is the amount due (after it was billed) by the Patient.
- d) **Co-Pay:** This is the amount due (after it was billed) by the Patient.

Visits: This area shows you how many visits the Patient has had with your office as of today based on the number of claims billed (either to the Insurance or to the Patient):

- a) **Number of Visits:** Shows the total number of visits.
- b) **First Visit:** Shows the date the of the Patient's first visit.
- c) **Last Visit:** Shows the date of the Patient's last visit.

Other Items: This last area has no official title to it; however, the information for each is explained below:

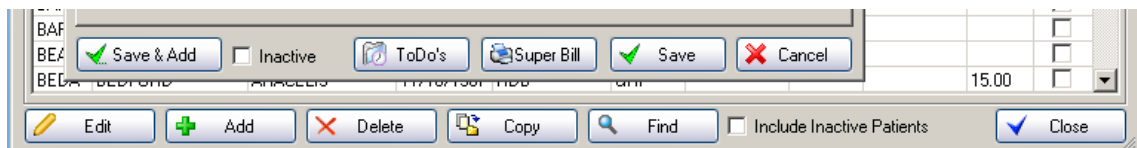
- a) **Floating Credit:** Shows the amounts collected to date but not applied to any specific service date (through the Credit option in the Patient Record).
- b) **Number of Cancellations:** Shows how many times the Patient has been a No-Show or has called in advance to Cancel their visit (so long as your office billed the Patient a Cancelled Visit charge). Please refer to the **section** titled "**CLAIMS**" for information on how to enter a cancelled visit into the program.

6. Inactivating a Patient Record

Your office will have some Patients whom either come to see you only once and never again, or whom have not seen you for a long time because they have moved, they passed on, or they have been released from your Provider's care.

The MPM Office program allows you to whittle down the number of Patients that appear in your **Patient Data** screen by allowing you to hide them by making them "**Inactive**".

Towards the bottom left of the Patient Record, click in the check box labeled "**Inactive**" and then click the **SAVE** button when done.



The Patient Record is then removed from the Patients Data screen. If you ever need to find them again, simply click on the box labeled **Include Inactive Patients** found towards the bottom right of the **Patients Data** screen. A column will appear on the far left labeled **INACTIVE** with a check mark in the boxes below next to those accounts that were made inactive.

7. Adding a Task (creating a To-Do's) for a Patient Record

There may be times when you have to schedule for yourself reminders that have to do with a Patient's Record/Account, such as: follow up on promised payment, get new Prior Authorization numbers, or follow up on lab results, etc.

8. Printing a Super Bill from within the Patient Record

To make it easier for the biller to enter charges after the Patient has been seen, you can create and print a **Super Bill** (also known as a Charge Tag or Charge Slip) that the Provider can use to check off the items that were done (the diagnosis and procedures) as the Patient is being seen.

Click the **Super Bill** button at the bottom towards the middle of the **Edit Patient Data** screen to begin preparing the Super Bill. Refer to the section titled "**Using the Super Bill Feature**" for instructions on how to set up and create the Super Bill.