

FRONT DESK PROCEDURES IN MEDINFORMATIX

First thing to do is start in the Master Appointment List -

SCENARIO 1: PATIENTS WITH APPOINTMENT

Step 1: Once you have found the patient, highlight them. Then confirm the appointment time with the patient.

Step 2: Tag patient "Tag as Arrived"

The screenshot shows the Valley Radiology Consultants software interface. At the top, there's a blue header with the company name and a notification badge showing '28'. Below the header is a toolbar with various icons and buttons like 'Refresh', 'Tag', 'Assign Rm', 'Finish', 'Appt Notes', and 'Acct N'. A secondary toolbar contains buttons for 'Wednesday', 'Today', 'Payment', 'Demographics', 'Bill', 'Balance', 'View Orders', and 'Walk'. Below these are radio buttons for 'Unfinished Appts', 'Unbilled Appts', 'Active Appts', and 'All Appts', along with dropdown menus for 'Am/Pm' (set to 'All Day') and 'Facility' (set to '[All]').

The main area displays a table of appointments:

Date/StartTime	Book	Patient	DOB	Code	
11/15/2017 08:15 AM	ELM_MG	Childs, Joyce	12/31/1961	1158	+MG SCREENIN
11/15/2017 08:30 AM	CB_CT	Test, Betty	03/03/1955	227	CT ABDOMEN V
11/15/2017 08:30 AM	CB_CT	Test, Betty	03/03/1955	227	CT ABDOMEN V

Overlaid on the bottom of the screenshot is a 'Tag Appointment' dialog box with three buttons: 'Tag as Arrived', 'Tag Ready for Service', and 'Exit'.

Step 3: Double click on the patient

The screenshot shows the patient record view for Betty Test. The top menu bar includes 'File', 'Views', 'Patient', 'Utilities', 'Reports', 'Setup', 'Window', and 'Help'. Below the menu is a 'MAIN TREE' section with a list of navigation options: 'Exit', 'Repository', 'DX', and 'Orders'. The main content area displays patient information:

st. Betty Account: 3154394 DOB: 03/03/1955 AGE: 62 yrs. Patient Type: SELFPAY Login: KSARKIS

BETTY TEST
ACCOUNT: 3154394
DOB: 03/03/1955 AGE: 62 yrs. SEX: F
Home Phone: 619/589-8628 Daytime Phone: 619/589-8628 Cell Phone: —

SELFPAY

Step 4: Click on Front Desk/Check-In. If you are already defaulted to the Front Desk tree, ignore this step.

Step 5: Click on the Verify Demographics branch

- Verify Patients Name
- Verify patients Address
- Verify patients Phone Number (home and cell)
- Verify patients Email Address
- Verify Preferred Communication Method (Call, Text, Email)
- Verify patient Insurance –
 1. Make sure that the insurance at the bottom of the screen is correct.
**Never manually change the Patient Type dropdown.

2. If patient has insurance and it is not provided in the system:
 - a. Click on Add Coverage -Input insurance name and click OK.

N/A | SELFPAY | NO PREFERENCE

Fee Schedule | Drug Formulary | Other Patient ID | Patient Employer

Insurance Coverages

Add Coverage
Edit Coverage
Copy Coverage
 Active Only

Account Info

Account Balance
Patient Due
Unpaid Deductible
0.00

Insurance Search

Search field

Name
 Code
 PO Box / Zipcode
 Form
 Phone/Fax (999/999-9999)
 Insurance Plan Type

Text occurrence

Tip: Use a '?' at the end of a search string to retain search results.

OK Cancel

A	B	C	D
E	F	G	H
I	J	K	L
M	N	O	P
Q	R	S	T
U	V	W	X
Y	Z	Space	

b. Highlight Correct Insurance and click Select.

Insurance Carriers

Select Cancel Search Add View

Insurance Name	Code	Network	Address
[None]			
AETNA	AETNA_69		P O BOX 14079
AETNA *EXCHANGE* (COVERED CA)	AETNAEXCHA_141:		
AETNA MEDICARE	AETNAMEDIC_1074		PO BOX 13441

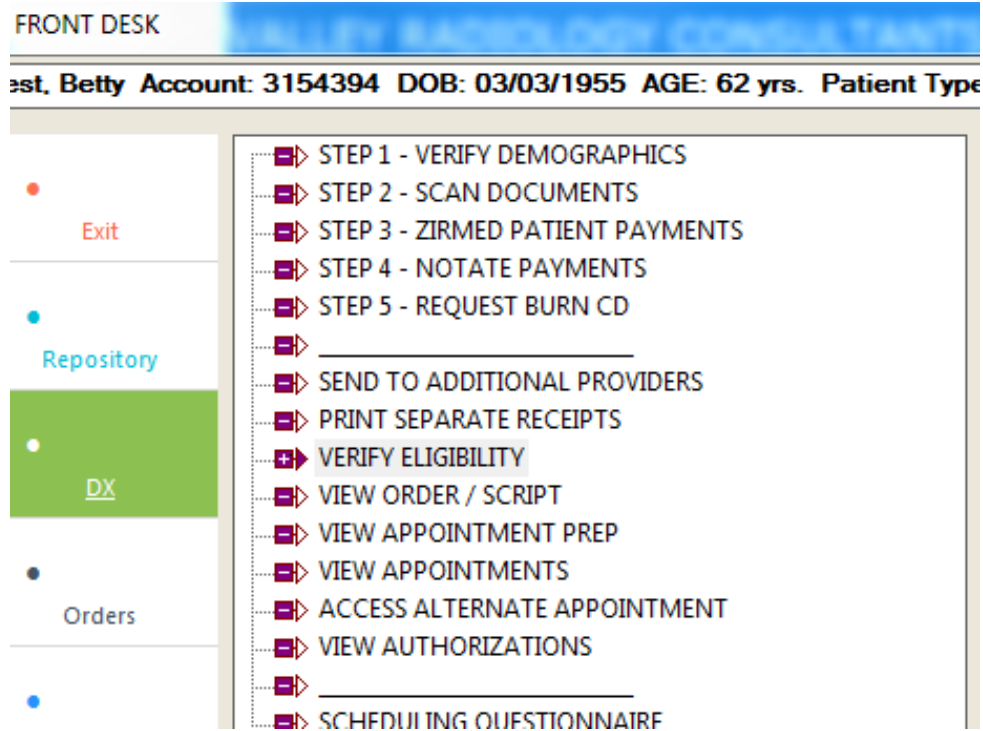
- c. In the next screen that opens, scroll down to the blue Insured ID/HIC field- Input Insurance ID # from Patient's Insurance Card (Policy Number).
- d. Input Insured Croup # from Patient's Insurance Card if they have it.
- e. Ask who is the Primary Insurance Holder - Input First and last name, DOB and Pat. Relation.
- g. Click OK and Save

Insurance Carrier		Remove	Eligibility	OK	Cancel
AETNA (AETNA_69) Change					
BOX 14079 KINGSTON, KY 40512 Plan Type: STANDARD		Employer <input type="text"/> Change			
Coverage Level	Coverage Type	Form			
Secondary	H - Health	H1			
Insured Information					
First Name	Middle Name	Last Name	Suffix	Pat. Relation	
TTY		TEST		1 - Self	
Date of Birth	Address		Address 2		
03/1955	8851 CENTER DR STE. 3061				
Gender	City	State/Province	Zip/Postal Code	Country	
<input type="radio"/> Male	LA MESA	CA	91942	USA	
<input checked="" type="radio"/> Female	Insured Phone	Insured Group	Insured ID/HIC	Special Info	
<input type="radio"/> Undiff.	619/589-8628				
Insurance Plan	Member ID		Financial Responsibility Type		
	Set Plan Profile				
Primary Media Payor					
<input type="text"/> Change					
Primary Contact		Coverage Period		Eligibility	
Primary Adjustor	Adjustor Phone	Valid From	Valid To	Verification Status	
				-	

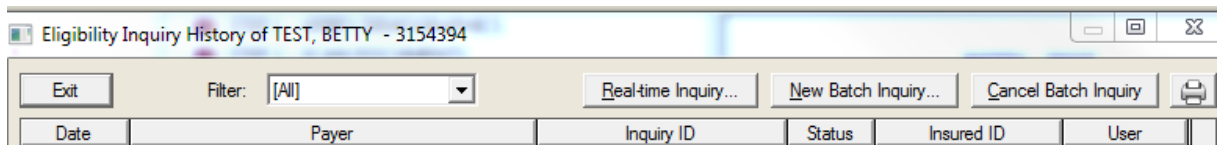
- To inactivate the insurance, click Edit Coverage → change the Coverage Level dropdown to 'Inactive' and press OK.

If eligibility has not been checked:

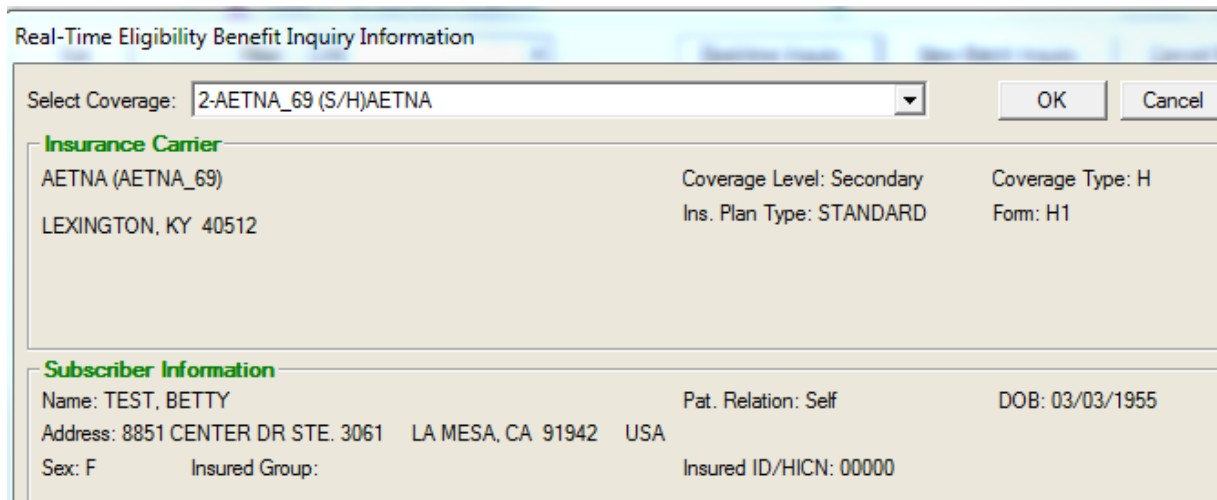
- Click the VERIFY ELIGIBILITY branch



2: Click on Real-time Inquiry and click OK.



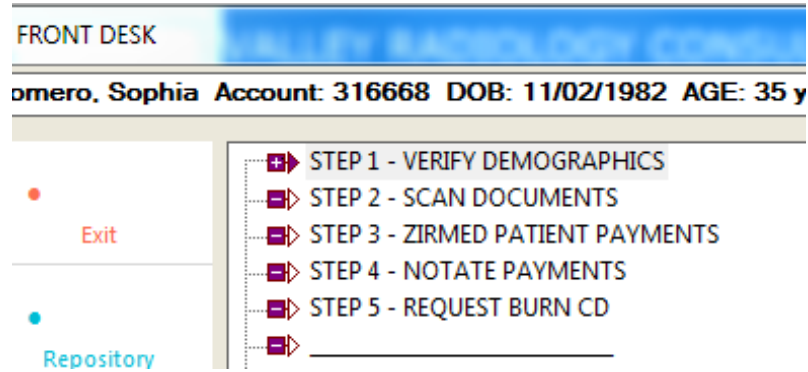
3: Make sure the coverage is correct in the next screen and press OK.



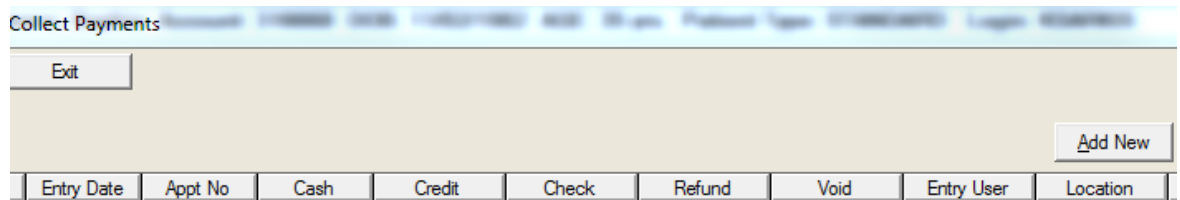
4: Zirmed will appear in Internet Explorer with the status. Verify that the patient is Active and then click Exit.

If eligibility was already checked by the Chasers, then you can ignore these steps above.

STEP 6: If the patient has a copay/coinsurance/deductible to collect, click on the STEP 4 - NOTATE PAYMENTS branch.



a. Click on Add New



b. Enter payment amount under the correct section (cash, credit or check), and all the necessary information. Then click Done and click EXIT.

Collect Payments

Date: 11/17/2017 Account: 316668 Name
ACC#: 5012120 Age: 35 yrs.

Done Cancel

Cash

Cash Amount: \$

Credit

Credit Type

- Visa Credit
- MasterCard
- Discover
- Visa Debit
- Bank-issued
- Multiple types

Credit Amount: \$

Check

Check Amount: \$

c. Verify information on the receipt. Print the receipt out for the patient and click on Save to Chart then click Exit.

Edit Chart Document

Save to Chart Exit Spell Check Document

VALLEY RADIOLOGY

Patient: BETTY TEST
Account: 3154394
Accession: 5011283
Appt Reason: MG DIAGNOSTIC MAMMOGRAM W AUG

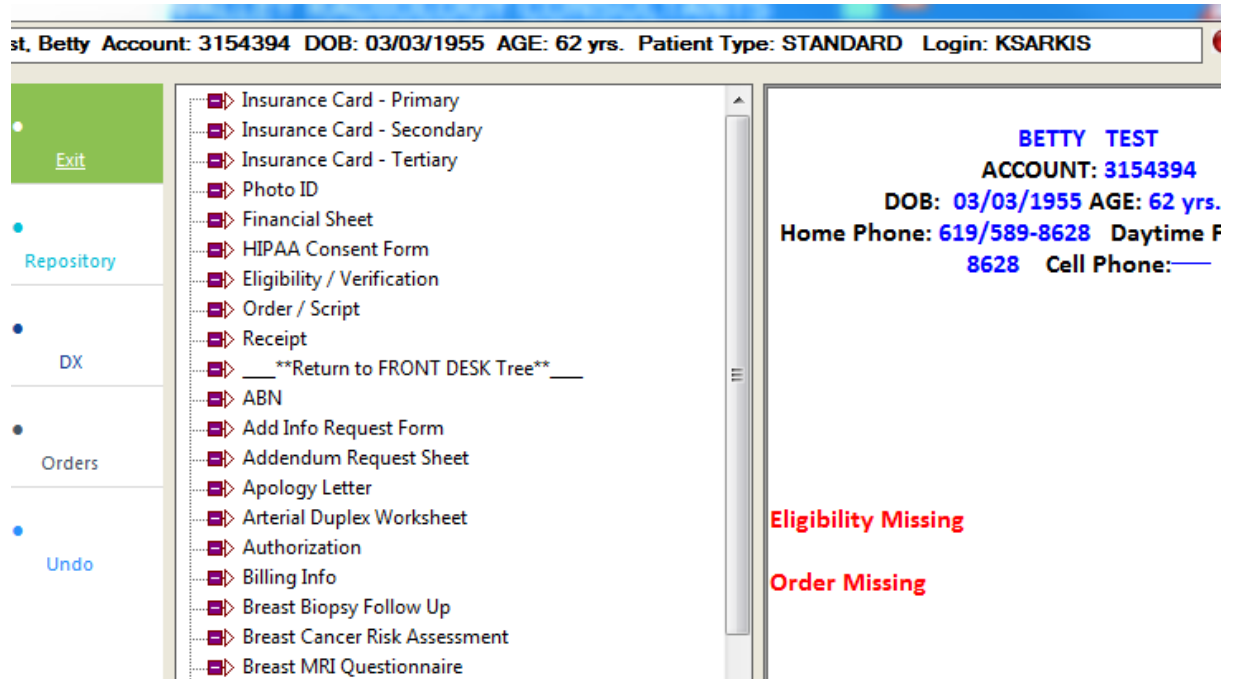
TRANSACTION APPROVI

Payment Details

Transaction Type:

Amount Due:

Step 7: Click on STEP 2 - SCAN DOCUMENTS - Scan picture ID, Insurance card(s), signed financial and HIPPA Forms. If patient comes in with previous clinical notes or cd then scan info. and download CD. Click 'Return to FRONT DESK Tree' when finished scanning in documents.



Step 8: Scroll down on the patient's chart. Look for any missing information which will display in RED. If information is in green, then all information is complete.

BETTY TEST
ACCOUNT: 3154394
DOB: 03/03/1955 AGE: 62 yrs. SEX: F
Home Phone: 619/589-8628 Daytime Phone: 619/589-8628 Cell Phone: —

eligibility Missing

Order Missing

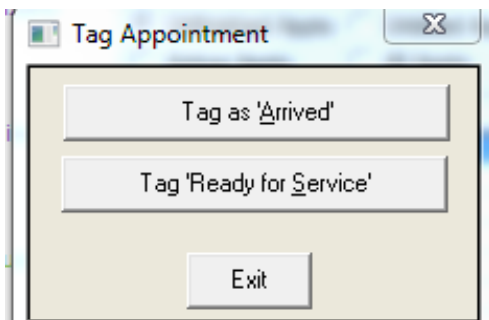
CURRENT EXAM: CT- CT ABDOMEN W CONTRAST APPTNO:5013163
EXAM DATE AND TIME: 11/15/17 08:30 AM STATUS:
SCHEDULED BOOK: CB_CT
LOCATION: VRC CARLSBAD - CT
REASON FOR EXAM:
APPOINTMENT NOTES:
PRIORITY: ROUTINE

RADIOLOGIST ASSIGNED TO:

RELEVANT PRIORS:

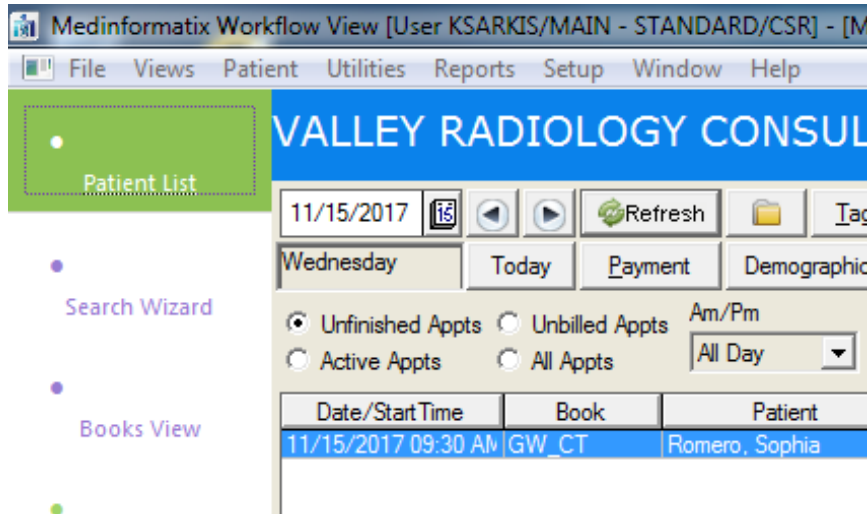
Step 9: Exit out of the chart and go back to the Master Appointment List. Make sure the patient is still highlighted.

Step 10: Click on Tag - then click on 'Tag Ready for Service' and have patient sit down to wait for the technologist.



SCENARIO 2: IF PATIENT IS NOT ON THE MASTER LIST

STEP 1: Go to the Medinformatix Workflow tree and click on Patient List



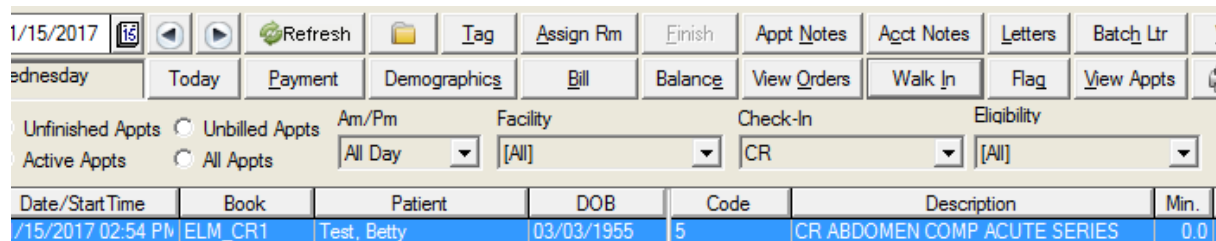
Step 2: Enter patient DOB or full name and look for your patient.

Step 3: Check the 'View Appts' screen within the patient list to see if the patient already has an appointment scheduled (may be for a different date or location).

If the patient does not have an exam scheduled, and it is not an X-Ray, refer to the **Scheduling in MedInformatix** standard operating procedure document.

WALK IN PATIENTS - X-RAY

Step 1: From the Master List, click on the Walk In button.



Step 2: Enter DOB or full name to search for patient to see if they already exist in the system.

If the patient doesn't already exist, click the 'New' button and create a new demographic record for the patient.

Step 3: Once you have the patient highlighted, click on 'Appt Requests' to see if there is an order from a referring doctor in the system.

Patient List

Select	New	Demographics	View Appts	Account Note	Bill	Payment	Send Message	
Exit	MPI	Balance	View Orders	Authorizations	Letters	Collect Note	Assign Room	Appt Requests

Search Criteria

Name	Account	DOB	HIC	Phone	Appt No	Recent Patients
		03/03/1955				
Guarantor	MR No.	MPI	PID	SSNO		Refresh Alphabet Clear

Last Name	First Name	I	DOB	Sex	Account	MR No	Patient Type	Dr	Home Phone
Betty	Test	0	03/03/1955	F	14490	14666	SELEBY	N/A	958/486-2627

If an order exists in the Appt Request Screen:

- 1: Highlight the exam and click on Books View.

Appointment Requests for TEST, BETTY

Exit	Request Status: [All]	Link Appt	Books View	Search Wizard	View Doc.	Add Request
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Due Date	Reason	Dept	Req. Type	Req. Status	Work Step	Docs	Req. ID
09/25/2017	CT PET SCAN	CT	Inbound Fax	CANCELLED	New		15
10/04/2017	MR CERVICAL SPINE WO CON`MR	MR	Inbound Fax	PENDING	New		444
11/15/2017	CR ABDOMEN COMP ACUTE SICR		Inbound Fax	PENDING	New		4794

- 2: Pick the time slot that the patient came in and right click to set appointment.

Appointment Requests for TEST, BETTY

Books View

11/16/2017 Refresh

Thursday Today Legend

Facility/Provider
^CR

Use Last Patient

Time	GW_CR
08:45 AM	
08:50 AM	
08:55 AM	
09:00 AM	
09:05 AM	
09:10 AM	
09:15 AM	

- 3: Make sure the referral source field shows the referring doctor and click OK.
- 4: Once in the patient's chart, follow steps from scenario 1 from step 5 and on.

If an order does not exist in the Appt Request Screen:

Step 4: Go back to Patient List, highlight patient and click 'Select'.

Step 5: Select the Appt Group of CR and the facility that the patient is at. Click 'Select'.

Select Appointment Book

Select Cancel Appt Group CR Refresh

Facility GW

Book Name	Facility	Code	Appt Group
Diagnostic Xray	GW	GW_CR	CR

Step 6: Highlight the specific procedure then click 'Select'.

Appointment Reason Selection

Select Cancel Reason Description Reason Code Refresh

Reason	Appt Group	Code	Time
CR ABDOMEN AP VIEW	CR	2	15.0
CR ABDOMEN COMP ACUTE SERIES	CR	5	15.0
CR ABDOMEN COMPLETE, INC DECUBITUS AND/OR ERECT VWS	CR	4	15.0
CR AC JOINTS BILATERAL	CR	7	15.0
CR AC JOINTS LT	CR	8	15.0

Step 7: Enter the referring doctor into the Referral Source field.

Click on 'Search'.

Referral to Search

Clear

Search field

Name

Source Display

Organization

Code

Address

Specialty

Phone/Fax (999/999-9999)

Credential

NPI

Text occurrence

Tip: Use a "?" at the end of a search string to retain search results.

OK Cancel

A	B	C	D
E	F	G	H
I	J	K	L
M	N	O	P
Q	R	S	T
U	V	W	X
Y	Z	Space	

Step 8: Input name of Referring doctor the click OK.

Step 9: Pick the correct referring doctor, making sure it is the correct address, then click 'Select'.

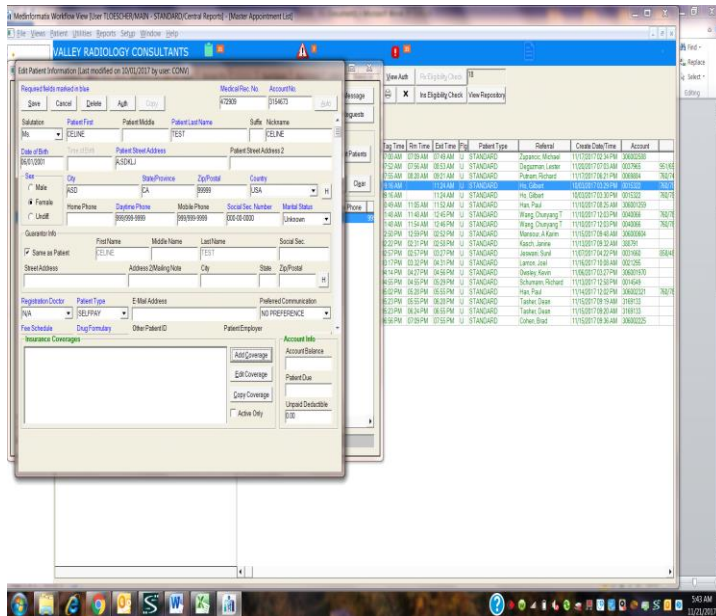
Step 10: Click 'Ok' in the Confirm Appointment screen. This will take you into the patient's chart. Once in the chart, follow steps from Scenario 1 (5-10).

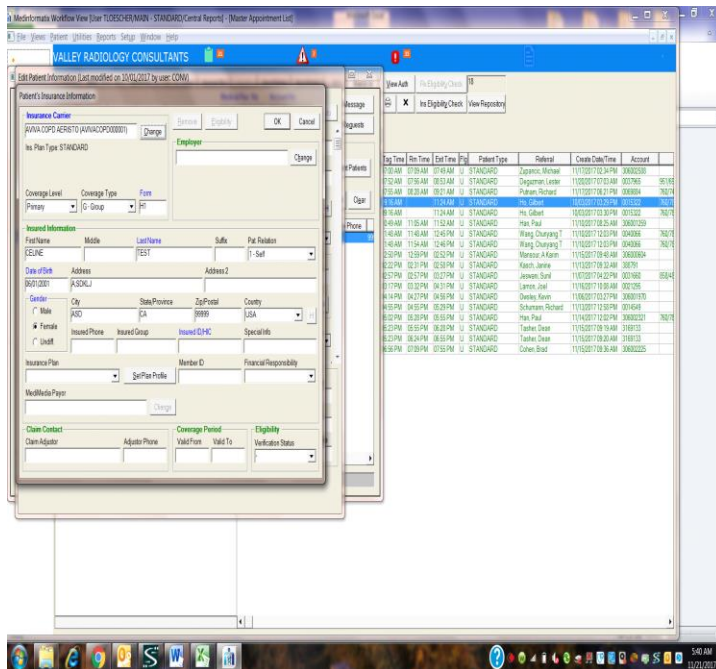
Coverage Type Selection- for Group and Lien accounts

If you are scheduling a Groupbill or Lien appointment, follow the steps below when creating the exam:

Step 1: Add the group as the patient's insurance. This way, accounting will know which group to bill.

- a. Go into the patient's demographic screen.
- b. Select 'Add Coverage'.
- c. Add the group and use '11' as the policy number.





Step 2: Schedule the appointment using the Scheduling in MedInformatix standard operating procedure document.

Step 3: When you get to the Confirm Appointment screen (last screen in the scheduling process), change the Coverage Type dropdown to 'G -Groupbill' or 'L – Lien'.

Step 4: Press 'OK' to schedule the exam.

How to know if it is a Groupbill exam or Lien Coverage type:

Select Group Coverage Type For:

Clinical Trials (e.g. Alliance Clinical Research, Aviva Clinical Research, etc.)

Group Read Accounts (e.g. Dr. Schiffman tech only exams, Rheumatology Center of SD, etc.)

Teleradiology Read Accounts (e.g. Universal Imaging Center, Encompass, etc.)

Select Lien Coverage Type for:

All Lien exams.