Notes:

1 - Diagnosis Report

Purpose: Prints a list of all the diagnosis on file in the Medical Office System.

Sort: The report can be sorted by your diagnosis code, standard ICD-9-CM code, YTD times used, Diagnosis category, or diagnosis description.

Selection: The report selects all or only utilized diagnoses on file in the MOS.

Paper: Default printer with 80 column report for 8.5" paper. No special printer control.

Procedure: At the Reports Main Menu press 1 for the "MOS Diagnosis/Procedure Menu", then press 1 for Diagnosis Report to display the Sort Diagnosis Report Menu.

```
Change Printer Selection? (Y/N)  >
```

Press Y to change the printer destination. A new selection for only Utilized Codes has been added.

```
SELECT:  <A>ll,  <U>tilized Codes Only: >
```

Press A to print all diagnosis codes as before. Press U to only print codes that were utilized. This can shorten the list dramatically.
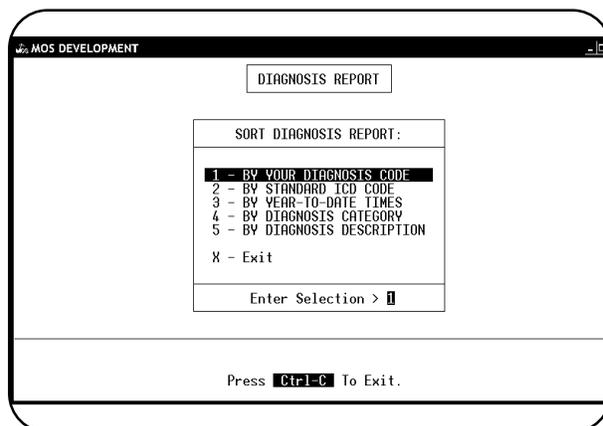

Figure 1-1 : Sort Diagnosis Menu

Select one sort option by highlighting your choice using the arrow keys and pressing ENTER or press the number corresponding to your choice. To cancel the report, press X .

After choosing a sort option, the system will select, sort, then print those records.

See Appendix C for a sample printout.

2 - Diagnosis Utilization Report

Purpose: Prints a list of all the diagnoses on file with the usage for each month and year-to-date totals.

Sort: The report can be sorted by diagnosis code, I.D. code, year-to-date times used, or a diagnosis category.

Paper: Default Printer, 132 column report with Printer Initialization code 13 to set 16.7 pitch. This should allow the report to print on 8.5" paper. If your printer cannot print this size, the report will require 15" paper.

Selection: The report selects all diagnosis on file in the MOS.

Procedure: At the Reports Main Menu, press 1 for the "MOS Diagnosis/Procedure Menu" then press 2 for Diagnosis Utilization. If you assigned a FINANCIAL PASSWORD, you will need to supply it at this time. Then the Sort Diagnosis Report Menu is displayed.

```
Change Printer Selection? (Y/N)  >
```
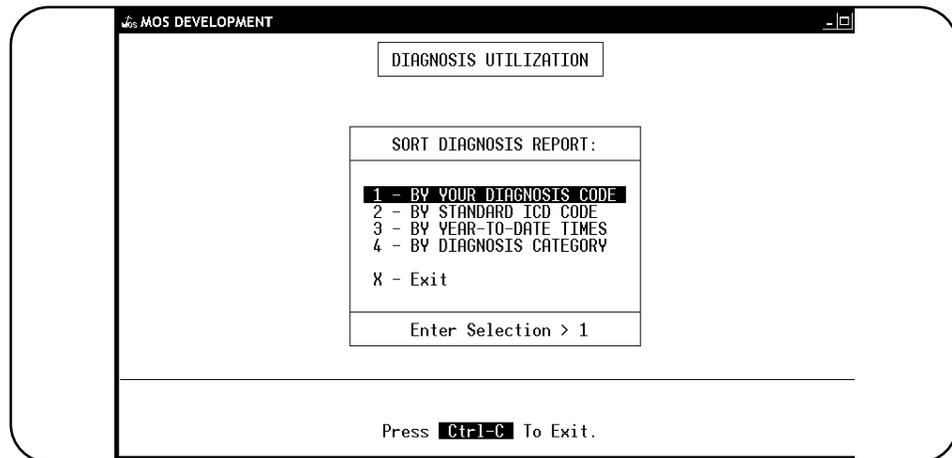
Press Y to change the printer destination.

Figure 1-2 : Sort Diagnosis Report Menu

Select one sort option by highlighting your choice using the arrow keys and pressing ENTER   or press the number corresponding to your choice. To cancel the report, press X .

After choosing one of the sort options, the system will select, sort and then print those records.

See Appendix C for a sample printout.

3 - Diagnosis by Patient

Purpose: Prints a list of selected diagnosis currently listed on invoices in the MOS showing the usage between the date range with the patient's name. Since the source of the data is the patient invoices, this report is only accurate in the recent past. Once the invoices reach the age where they are being purged, the report would not include all invoices.

Sort: The report is sorted by patient name, then date.

Selection: Provider, diagnosis category (or diagnosis code), from-date and to-date are entered to determine which records are to be selected.

Paper: Default Printer with a 95 column width, with special printer initialization code 12 to select 12 pitch print. This will enable the report to print on 8.5" paper. If your printer is unable to print smaller than 10 pitch you will require 15" paper.

Procedure: At the Reports Main Menu press 1 for the "MOS Diagnosis/Procedure Menu" then press 3 for the Diagnosis By Patient. Answer the following record selection questions:

```
Change Printer Selection? (Y/N)  >
```

Press Y to change the printer destination.

Then a slide list is displayed where you can select all providers or one provider. Highlight your selection and press ENTER .

```
ALL PROVIDERS
1    -Vicki Henry
11   -Dennis Spanish
12   -John Candy
18   -Ima Badboy
8    -Wilson Pickit
```

```
ENTER DIAGNOSIS CATEGORY >
```

If you press ENTER to the diagnosis category, you will asked for a diagnosis code.

```
ENTER DIAGNOSIS CODE>
```

Press ENTER to select all diagnosis codes.

```
ENTER FROM DATE >
```

then

```
ENTER TO DATE >
```

After entering the last question, the system sorts then prints the records.

See Appendix C for a sample printout.

4 - Multiple Diagnoses by Patient

Purpose: Prints a list of all patients that have been diagnosed with the same group of diagnoses.

Sort: The report is sorted by Patient Account..

Selection: All patients that have been diagnosed with the list of codes given will be selected.

Paper: Default Printer with a 80 column width. This will print on 8 ½ x 11" paper.

Procedure: At the Reports Main Menu press ☐1 for the "MOS Diagnosis/Procedure Menu" then press ☐4 for Multiple Diagnoses By Patient. Answer the following record selection questions:

```
ADD A DIAGNOSIS
START SEARCHING
```

Select "ADD A DIAGNOSIS" and enter a diagnoses code. It is added to the list. Repeat that for as many codes as you wish to search. If you add one in error, highlight it and press ENTER . It will be deleted. When all the codes have been indicated, highlight "START SEARCHING" and the report will begin its search. Then the printer selection question will be displayed.

```
Change Printer Selection? (Y/N)  >
```

Press ☐Y to change the printer destination.

See Appendix C for a sample printout.

5 - Diagnosis History by Patient

Purpose: Prints a list of diagnosis history by patient. This can be used to discover what patients have a given diagnosis, or look at the demographics of your practice for treatment and care considerations.

Sort: The report is sorted by patient, then date of diagnosis. If the summary version is selected, the report is sorted by patient, then diagnosis code and the oldest date for that diagnosis is listed.

Selection: A variety of selection options are available. By provider, by diagnosis category, by one diagnosis and then between two dates provided by the users.

Paper: Sent to Default Printer, 85 column report with special printer code 12 to print at 12 pitch. At this setting the report should fit on 8.5" paper

Procedure: At the Reports Main Menu press ⬚1 for the "MOS Diagnosis/Procedure Menu" and then press ⬚5 for Diagnosis History by Patient. Enter your access information, login, password, reason and then the printer option appears.

```
Change Printer Selection? (Y/N)  >
```

Press ⬚Y to change the printer destination. Then a slide list is displayed where you can select all providers or one provider. Highlight your selection and press ⬚ENTER .

```
ALL PROVIDERS
1     -Vicki Henry
11    -Dennis Spanish
12    -John Candy
18    -Ima Badboy
8     -Wilson Pickit
```

At this point you may select only one diagnosis category. Enter the code in the prompt or leave it blank for all codes.

```
Enter Diagnosis Category (BLANK to Select ONE DIAGNOSIS CODE)
```

If the diagnosis category is blank then the diagnosis code prompt appears:

```
Enter Diagnosis Code:
```

Then a date range may be entered. This will default to all possible dates. Then an option to allow the report to be summarized by listing the diagnosis code only once for each patient. This will reduce the volume of the report, since each time a patient is treated for the diagnosis it will be entered in the file. This prompt will shorten the report.

```
Summarize and list one line per patient? (Y/N) N
```

The default is No but change it to save paper. The report will show the first date the patient was diagnosed with that condition, if you selected only a summary.

6 - Procedure History by Patient

Purpose: Prints a list of procedure history. This can be used to discover what patients have had a given procedure, or look at the demographics of your practice for treatment and care considerations.

Sort: The report is sorted by procedure then patient, then date of procedure. If the summary version is selected, the report is will only list a procedure once for each patient.

Selection: A variety of selection options are available. By provider, by type of service, by one procedure and then between two dates provided by the users.

Paper: Sent to Default Printer, 85 column report with special printer code 12 to print at 12 pitch. At this setting the report should fit on 8.5" paper

Procedure: At the Reports Main Menu press ☐1 for the "MOS Diagnosis/Procedure Menu" and then press ☐5 for Diagnosis History by Patient. Enter your access information, login, password, reason and then the printer option appears.

```
Change Printer Selection? (Y/N)  >
```

Press ☐Y to change the printer destination. Then a slide list is displayed where you can select all providers or one provider. Highlight your selection and press ⎡ENTER⎤ .

At this point you may select only one diagnosis category. Enter the code in the prompt or leave it blank for all codes.

```
ALL PROUIDERS
1    -Uicki Henry
11   -Dennis Spanish
12   -John Candy
18   -Ima Badboy
8    -Wilson Pickit
```

```
Enter Diagnosis Category (BLANK to Select ONE DIAGNOSIS CODE)
```

If the diagnosis category is blank then the diagnosis code prompt appears:

```
Enter Diagnosis Code:
```

Then a date range may be entered. This will default to all possible dates. Then an option to allow the report to be summarized by listing the diagnosis code only once for each patient. This will reduce the volume of the report, since each time a patient is treated for the diagnosis it will be entered in the file. This prompt will shorten the report.

```
Summarize and list one line per patient? (Y/N) N
```

The default is No but change it to save paper. The report will show the first date the patient was diagnosed with that condition, if you selected only a summary.

M - Annual Procedure Utilization

Purpose: Prints a list of selected procedures on file in the Medical Office System with the usage for each month with a year-to-date total.

Sort: The report can be sorted by either: your ID code, year-to-date times used, standard CPT code, year-to-date amount, type of service code, or alphabetically by description.

Selection: Selects any given year,

Paper: Sent to Default Printer, 132 column report with special printer code 13 to print at 16.7 pitch. At this setting the report should fit on 8.5" paper. If your printer is not capable of printing this small this report will require 15" paper.

Procedure: At the Reports Main Menu press [1] for the "MOS Diagnosis/Procedure Menu" and then press [B] for Procedure Utilization. If a FINANCIAL PASSWORD was assigned to your system you will prompted for password at this point.

> **Change Printer Selection? (Y/N) >**

Press [Y] to change the printer destination. The Selection Procedure Browse will then be displayed as shown in Figure 11.1, 11.1, 11.1.

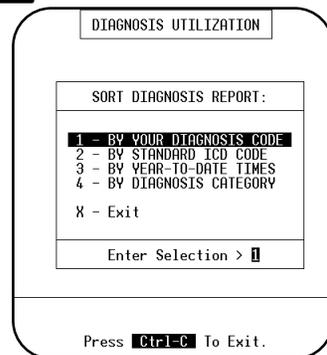Choose one of the selections by highlighting your choice using the arrow keys and then pressing [ENTER] .

```
┌──────────────────────────────┐
│     DIAGNOSIS UTILIZATION     │
│                              │
│   ┌────────────────────────┐ │
│   │  SORT DIAGNOSIS REPORT: │ │
│   │                        │ │
│   │ 1 - BY YOUR DIAGNOSIS CODE│
│   │ 2 - BY STANDARD ICD CODE │ │
│   │ 3 - BY YEAR-TO-DATE TIMES│ │
│   │ 4 - BY DIAGNOSIS CATEGORY│ │
│   │                        │ │
│   │ X - Exit               │ │
│   │                        │ │
│   │   Enter Selection > █   │ │
│   └────────────────────────┘ │
│                              │
│     Press Ctrl-C To Exit.    │
└──────────────────────────────┘
```

Figure 1-6 : Sort Procedure Report Menu

The Sort Procedure Report Menu will then be displayed as shown in Figure 11.1, 11.1.

Select one of the sort options by highlighting your choice using the arrow keys and then pressing [ENTER] or press the number corresponding to your choice. To cancel the report press [X] . After choosing one of the sort options the report will start to select and sort the records and then print.

> **Add Descriptions in last column? (Y/N) >**

A prompt to add a description to the last column will be displayed. This will print the procedure description, but will require wider paper. It is left as an option.

See Appendix C for a sample printout.

A - Procedure Report

Purpose: Prints a list of procedures on file in the MOS.

Sort: The report can be sorted by either: your ID code, year-to-date times used, standard CPT code, year-to-date amount, type of service code, or alphabetically by description.

Selection: The report can select all procedures on file in the MOS, which includes procedures assigned to an individual provider, or all default procedures, which do not include procedures assigned to an individual provider, or procedures assigned to one individual provider.

Paper: Sent to Default Printer, 92 column report with special printer code 12 to print at 12 pitch. At this setting the report should fit on 8.5" paper. If your printer is not capable of printing this small, this report will require 15" paper.

Procedure: At the Reports Main Menu press ① for the "MOS Diagnosis/Procedure Menu" and then press Ⓐ for the Procedure Report. The Selection Procedure Browse will then be displayed:

Change Printer Selection? (Y/N) >

```
ALL PROCEDURE CODES
DEFAULT PROCEDURE CODES
1   -Vicki Henry
11  -Dennis Spanish
12  -John Candy
18  -Ima Badboy
8   -Wilson Pickit
```

Press Ⓨ to change the printer destination. Then a selection indicates which procedures should be printed. Only procedures for a given provider, default procedures or all procedures can be selected at this time. Choose one of the selections by highlighting your choice using the arrow keys and then pressing ⌷ENTER⌷ .

Figure 1-7 : Selection Procedure Browse

Then an additional selection allows all codes of that group to be selected or only utilized codes. This can shorten the list even further.

SELECT: <A>ll, <U>tilized Codes Only: >

Press Ⓐ to print all procedure codes as before. Press Ⓤ to only print codes that were utilized. This can shorten the list dramatically.

The Sort Procedure Report Menu will then be displayed:

Select one of the sort options by highlighting your choice using the arrow keys and then pressing ⌷ENTER⌷ or press the number corresponding to your choice. To cancel the report press Ⓧ . After choosing one of the sort options the report will begin to select and sort.

See Appendix C for a sample printout.

```
        PROCEDURE REPORT

       SORT PROCEDURE REPORT:

    1 - BY YOUR PROCEDURE CODE
    2 - BY STANDARD CPT CODE
    3 - BY YEAR-TO-DATE TIMES
    4 - BY YEAR-TO-DATE AMOUNT
    5 - BY TYPE OF SERVICE CODE
    6 - BY PROCEDURE DESCRIPTION

    X - Exit
REPOR
        Enter Selection > 1

      Press  BREAK  To Exit.
```

Figure 1-8 : Sort Procedure Report Menu

B - Procedure Utilization

Purpose: Prints a list of selected procedures on file in the Medical Office System with the usage for each month with a year-to-date total.

Sort: The report can be sorted by either: your ID code, year-to-date times used, standard CPT code, year-to-date amount, type of service code, or alphabetically by description.

Selection: The report can select all procedures on file in the MOS, which includes procedures assigned to an individual provider, or all default procedures, which do not include procedures assigned to an individual provider, or procedures assigned to one individual provider.

Paper: Sent to Default Printer, 132 column report with special printer code 13 to print at 16.7 pitch. At this setting the report should fit on 8.5" paper. If your printer is not capable of printing this small this report will require 15" paper.

Procedure: At the Reports Main Menu press 1 for the "MOS Diagnosis/Procedure Menu" and then press B for Procedure Utilization. If a FINANCIAL PASSWORD was assigned to your system you will prompted for password at this point.
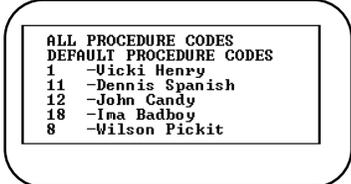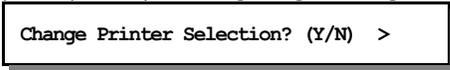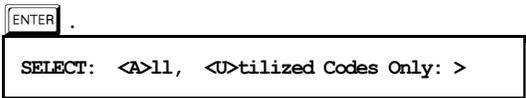
```
ALL PROCEDURE CODES
DEFAULT PROCEDURE CODES
1    -Vicki Henry
11   -Dennis Spanish
12   -John Candy
18   -Ima Badboy
8    -Wilson Pickit
```

Figure 1-9 : Selection Procedure Browse

```
Change Printer Selection? (Y/N)  >
```

Press Y to change the printer destination. The Selection Procedure Browse will then be displayed as shown in Figure 11.1, 11.1, 11.1.

Choose one of the selections by highlighting your choice using the arrow keys and then pressing ENTER .

```
SELECT:  <A>ll,  <U>tilized Codes Only: >
```

Press A to print all procedure codes as before. Press U to only print codes that were utilized. This can shorten the list dramatically.

```
         DIAGNOSIS UTILIZATION

        SORT DIAGNOSIS REPORT:

     1 - BY YOUR DIAGNOSIS CODE
     2 - BY STANDARD ICD CODE
     3 - BY YEAR-TO-DATE TIMES
     4 - BY DIAGNOSIS CATEGORY

     X - Exit

        Enter Selection > █


     Press  Ctrl-C  To Exit.
```
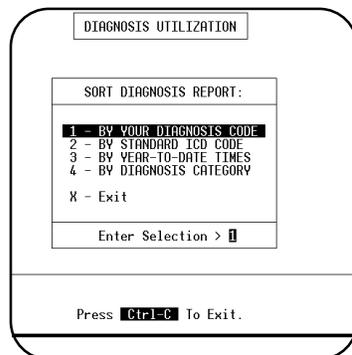
Figure 1-10 : Sort Procedure Report Menu

The Sort Procedure Report Menu will then be displayed as shown in Figure 11.1, 11.1.

Select one of the sort options by highlighting your choice using the arrow keys and then pressing ENTER or press the number corresponding to your choice. To cancel the report press X . After choosing one of the sort options the report will start to select and sort the records and then print.

```
Add Descriptions in last column? (Y/N) >
```

A prompt to add a description to the last column will be displayed. This will print the procedure description, but will require wider paper. It is left as an option.

See Appendix C for a sample printout.

C - Procedure by Patient

Purpose: Prints a list of patients that had selected procedures (preformed over a given period of time). The patient's name, date of service, age, number of services, and sex are listed. This report is based on invoice information. It will be valid for any time frame that has not been purged.

Sort: The report is sorted by provider, then type of service (or procedure), then by date.

Selection: Provider, type of service code (or procedure), from-date and to-date are entered by the user to determine the records to be selected.

Paper: Sent to default printer, 95 column report with special printer code 13 to print at 16.7 pitch. At this setting the report should fit on 8.5" paper. If your printer is not capable of printing this small this report will require 15" paper.

Procedure: At the Reports Main Menu press `1` for the "MOS Diagnosis/Procedure Menu" and then press `C` for Procedure by Patient. Then answer the following selection questions:

```
Change Printer Selection? (Y/N)  >
```

Press `Y` to change the printer destination. A listbox then appears with a choice of providers. Highlight your selection and press `ENTER` .

```
ALL PROVIDERS
1    -Vicki Henry
11   -Dennis Spanish
12   -John Candy
18   -Ima Badboy
8    -Wilson Pickit
```

The next selection can be either by TOS or Procedure code. If you give a TOS, the procedure code prompt will not be displayed. If you would like to select an individual procedure code, leave the TOS blank.

```
ENTER TYPE OF SERVICE CODE >
```

If you would rather select by procedure codes press `ENTER` . If you entered a TOS code, the next question is not displayed.

```
ENTER PROCEDURE CODE (ENTER FOR ALL) >
```

To select all procedures press `ENTER` .

```
ENTER FROM DATE (ENTER FOR Earliest) >
```

then

```
ENTER TO DATE (ENTER FOR Latest) >
```

After entering the last question the report will start to select and sort the records and then print.

See Appendix C for a sample printout.

D - Change MC Allowances

Purpose: Provides an easy way to change the Medicare charge and allowance for selected procedures. You would run this report after receiving Medicare's charge and allowance report.

Sort: The report is sorted by CPT Procedure code or Your Code.

Selection: The report selects the procedures for a given provider or all procedures on file.

Paper: Sent to Default Printer, 80 column report with no special printer codes. This will print on standard 8.5" by 11" paper.

Procedure: At the Reports Main Menu press `1` for the "MOS Diagnosis/Procedure Menu" and then press `D` for Charge MC Allowances. Then answer the following selection questions:

```
Change Printer Selection? (Y/N)  >
```

Press `Y` to change the printer destination.

A slide box is displayed with a list of providers that can be selected. Highlight your selection and press `ENTER` .

```
ALL PROVIDERS
1    -Vicki Henry
11   -Dennis Spanish
12   -John Candy
18   -Ima Badboy
8    -Wilson Pickit
```

New Sort on Change

MC Allows   Then a prompt will request the SORT required.

```
SORT BY: Y our Code    Or S tandard CPT
   Y
```

Select the sort you would like.

Then enter the expected payment factor.

> *Note: This will change the expected factor value in the setup file, see chapter 5, Setting Up the Practice File, for more information.*

```
Enter % Factor for Expected MC Payment >80.000
```

The next question asks if you are participating with Medicare. Answer `Y` if you accept assignment, answer `N` if you do not. This will enter the NON PAR payment amount base don the percent given. It is now possible to make exceptions to this general update. Do what will apply to the most items here and then update the exceptions with the alternate information. If your practice is varied, it may require various factors be defined.

If you indicated you are NOT participating, a question will ask if the MC NON PAR fee should be added automatically to each procedure. Answer `Y` if each should be done automatically. Answer `N` to have a prompt for each procedure give you a choice. The NON PAR payment amount would be (Allowed Amount x Expected MC payment Factor) X NON Par Allowance Factor. For example, Standard Charge: $100, MC Allowance= $92, MC payment factor=80% , and NON PAR Allowance % = 95% would give a payment of 92x.8x.95 or $72.20. The factors can be changed on the Practice Information Default Screen.
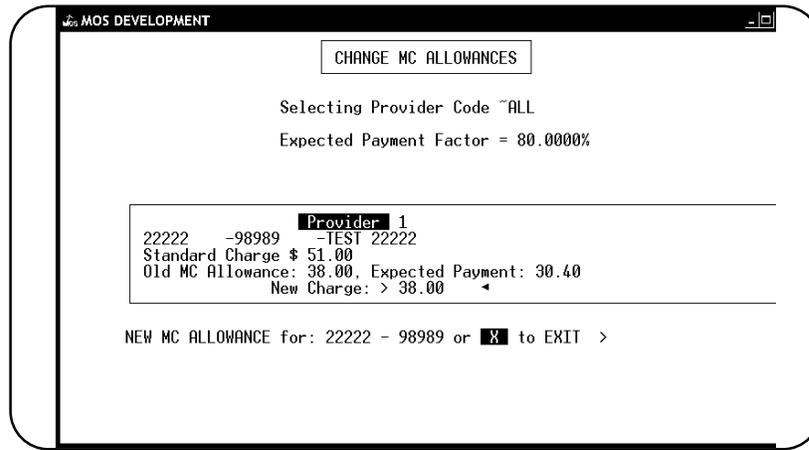
Then the first procedure you requested will be displayed:

```
 ᴹᴼˢ MOS DEVELOPMENT                                          _ ▢

                        ┌─────────────────────┐
                        │ CHANGE MC ALLOWANCES │
                        └─────────────────────┘

                     Selecting Provider Code ~ALL

                    Expected Payment Factor = 80.0000%


        ┌──────────────────────────────────────────────────────┐
        │                   ███Provider███ 1                    │
        │  22222     -98989     -TEST 22222                     │
        │  Standard Charge $ 51.00                              │
        │  Old MC Allowance: 38.00, Expected Payment: 30.40     │
        │                 New Charge: > 38.00     ◄             │
        └──────────────────────────────────────────────────────┘

      NEW MC ALLOWANCE for: 22222 - 98989 or ██X██ to EXIT  >
```

Figure 1-13 : Changing Medicare Allowances

You may change the charge amount and expected payment by entering a new charge value and pressing ENTER . The MOS will automatically calculate the new expected payment to the charge times the Medicare Factor. Then the next procedure will be displayed.

If you do not want the change the charge, just press ENTER to keep the old charge and to automatically recalculate the new expected payment. Then the next procedure is displayed until all procedures have been completed, or press X then ENTER to cancel the rest of the report. Note: This report only changes the charge amount for Medicare.

See Appendix C for a sample printout.

E - Procedure Payment Report

> *Note:* ***Payments and write offs must be applied to each charge line to analysis your income in this manner.***

Purpose: Print an analysis of the charges, payments, write-offs and refunds made by procedure. This report will only give accurate data if the payments and write-offs are entered by line items. In other words, a payment and write-off must be applied to each charge individually.

Sort: This report is sorted by procedure code.

Selection: One or all providers can be selected. One or all procedures can be selected. Only invoices paid in full will be considered. A date range is required which will select charges and payments posted against them based on the date of service of the charge.

Paper: Sent to default printer this report will print 115 columns with printer code for condensed print size so the report will print on 8.5" wide paper if your printer supports this size print, otherwise it will require 15 inch paper.

Procedure: Press ⬚G from the "Financial Reports Menu". If you assigned a FINANCIAL PASSWORD, you will be asked to enter it at this time. Then the following questions will be displayed:

```
Change Printer Selection? (Y/N)  >
```

Press ⬚Y to change the printer destination.

Highlight the correct provider and press ⬚ENTER . This option selects based on the provider listed on the invoice.

```
ALL PROVIDERS
1   - Vicki Henry
11  - Dennis Spanish
12   - John Candy
```

Then the next prompt is displayed:

```
Enter Selected Procedure Code:  (ENTER   for ALL)
```

Enter one procedure code, if only one should be selected. If this is left blank, all procedures will be selected.

```
Select on Referring Provider: (ENTER   for ALL)
```

Enter a code for the referring provider. This will limit the invoices selected to ones that have the referring provider that you have listed.

The next prompt will request the data range

```
Starting Date: (01/01/98) >
```

Supply the starting date or press ⬚ENTER to use beginning of the current year. This selects based on the date of service of the charge. Then a prompt for the ending date will be displayed.

```
Ending Date: (mm/dd/yy) ENTER   for 01/28/98 >
```

Enter the ending date. Today's Date is the default ending date supplied.

```
ONLY Select INVOICES with a Zero Balance? (Y/N) >
```

Enter ⬚Y to omit invoices with outstanding balances. This will allow you to include invoices with partial payments, but will affect the ratio that will tell you if the procedure is profitable

The report will then select and print. Then a last chance box is displayed to recap what you selected.

```
ALL PROVIDERS All Procedures,
Procedures done between 01/01/98 and 01/28/98
                Redo?  [Y]  [N]  [X] -Exit
```

Verify the information and press [ENTER] or [N] to create the report. Press [Y] to repeat the selections. Press [X] to exit to the menu without printing.

See Appendix C for a sample printout.

F - Procedure Count & Gross Charges

Purpose: Print an analysis of procedures done by each provider. Columns for each provider will display a count of procedures done and the gross charges billed for that procedure. Up to 8 providers can be listed.

Sort: This report is sorted by procedure code, Provider code. A total number of procedures done and total gross charges for each provider, is printed.

Selection: All services are selected between a given range of dates. If your system has more than 8 doctors on file, a selection will allow you to select up to 8 providers. Highlight and press ENTER on any provider you wish included. Select the last one called "END SELECTION" when you are done.

Paper: Sent to default printer this report will print 132 columns with printer code for condensed print size so the report will print on 8.5" wide paper if your printer supports this size print, otherwise it will require 15 inch paper.

Procedure: Press F from the "Financial Reports Menu", then the following questions will be displayed:

```
Change Printer Selection? (Y/N)  >
```

Press Y to change the printer destination.

```
ENTER FROM DATE (mm/dd/yy) ( ENTER   for Earliest)  >
```

Supply the starting date for selecting based on the date of service of the charge. Then a prompt for the ending date will be displayed.

```
ENTER TO DATE ( ENTER   for Latest)   >
```

Enter the ending date or press ENTER for today's date plus one year. Than should adequately include all transactions to the latest date.

If your practice has more than 8 doctors on file, a window will appear here and you can highlight any providers you wish included on this report and press ENTER . Continue to highlight and select until up to 8 doctors have been selected. The codes selected are displayed in the bottom left corner of the screen. When you are finished with your list, highlight "END SELECTION" and press ENTER .

```
ALL Procedures done between 01/30/83 and 01/26/99
                    REDO?   Y   N  eX it
```

Press N or ENTER to create the report. Press Y to repeat the selections or X to exit without printing.

See Appendix C for a sample printout.

G - Procedure List - Medicare Prices

Purpose: Prints a list of procedures on file in the MOS with Medicare Allowance and expected payments.

Sort: The report can be sorted by either: your Procedure code, year-to-date times used, standard CPT code, year-to-date amount, type of service code, or alphabetically by description.

Selection: The report can select all procedures on file in the MOS, which includes procedures assigned to an individual provider, or all default procedures, which do not include procedures assigned to an individual provider, or procedures assigned to one individual provider. It is also possible to further narrow the scope of the report by only selecting codes that have been used in the last year.

Paper: Sent to Default Printer, 132 column report with special printer code 13 to print at 16.7 pitch. At this setting the report should fit on 8.5" paper. If your printer is not capable of printing this small, this report will require 15" paper.

Procedure: At the Reports Main Menu press 1 for the "MOS Diagnosis/Procedure Menu" and then press G for the Procedure List. The following prompts will then be displayed.

> **Change Printer Selection? (Y/N) >**

Press Y to change the printer destination.

Then you will be able to select the procedures codes by provider or all codes defined as shown in the figure at the right. Choose one of the selections by highlighting your choice using the arrow keys and then pressing ENTER . Then to make the report more helpful, you can narrow the report to just the utilized codes by selection U at the following prompt.

> **SELECT: <A>ll, <U>tilized Codes Only: >**

Press A to print all procedure codes as before. Press U to only print codes that were utilized. This can shorten the list dramatically.

Figure 1-14 : Selection Procedure Browse

The Sort Procedure Report Menu will then be displayed:

Select one of the sort options by highlighting your choice using the arrow keys and then pressing ENTER or press the number corresponding to your choice. To cancel the report press X . After choosing one of the sort options the report will begin to select and sort.
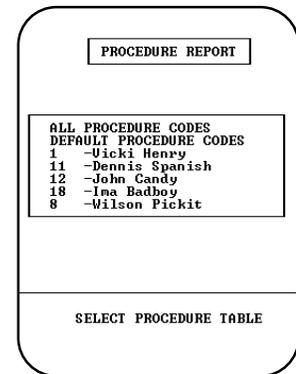
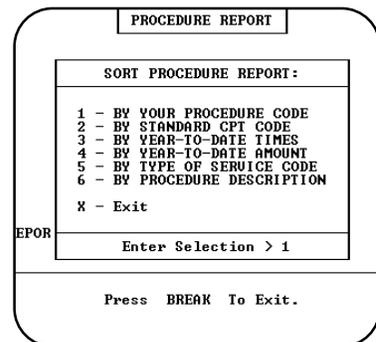See Appendix C for a sample printout.

Figure 1-15 : Sort Procedure Report Menu

H - Procedure List - Other Ins Prices

Purpose: Prints a list of procedures on file in the MOS with selected procedure allowance. This will print a price list for carriers other than Medicare with allowed charge and expected payments.

Sort: The report can be sorted by either: your Procedure code, year-to-date times used, standard CPT code, year-to-date amount, type of service code, or alphabetically by description.

Selection: The report can select all procedures on file in the MOS, which includes procedures assigned to an individual provider, or all default procedures, which do not include procedures assigned to an individual provider, or procedures assigned to one individual provider. It is also possible to further narrow the scope of the report by only selecting codes that have been used in the last year.

Paper: Sent to Default Printer, 132 column report with special printer code 13 to print at 16.7 pitch. At this setting the report should fit on 8.5" paper. If your printer is not capable of printing this small, this report will require 15" paper.

Procedure: At the Reports Main Menu press ⬚1 for the "MOS Diagnosis/Procedure Menu" and then press ⬚G for the Procedure List. The following prompts will then be displayed.

```
Change Printer Selection? (Y/N)  >
```

Press ⬚Y to change the [

Choose one of the selections by highlighting your choice using the arrow keys and then pressing ⟦ENTER⟧ .

```
┌─────────────────────────────┐
│      PROCEDURE REPORT        │
│                              │
│  ALL PROCEDURE CODES         │
│  DEFAULT PROCEDURE CODES     │
│  1    -Vicki Henry           │
│  11   -Dennis Spanish        │
│  12   -John Candy            │
│  18   -Ima Badboy            │
│  8    -Wilson Pickit         │
│                              │
│                              │
│     SELECT PROCEDURE TABLE   │
└─────────────────────────────┘
```

```
SELECT:  <A>ll,  <U>tilized Codes Only: >
```

Press ⬚A to print all procedure codes as before. Press ⬚U to only print codes that were utilized. This can shorten the list dramatically.
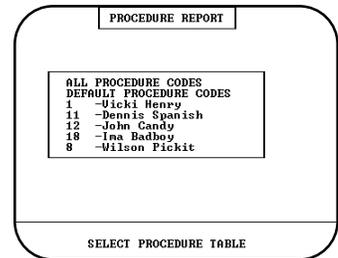
Figure 1-16 : Selection Procedure Browse

A prompt appears for you to select the Price Level that should print on this report:

```
Price Level 1 - Pennsylvania Medical Assistance
Price Level 2 - Keystone Health Plan West
Price Level 3 - Blue Shield of PA Special 65
```

This list will vary depending on the procedure allowances you defined for your carriers and procedures.

The Sort Procedure Report Menu will then be displayed:

Select one of the sort options by highlighting your choice using the arrow keys and then pressing ENTER or press the number corresponding to your choice. To cancel the report press X. After choosing one of the sort options the report will begin to select and sort.

See Appendix C for a sample printout.
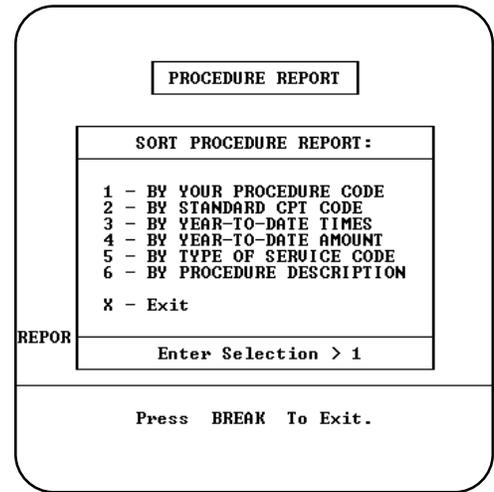

```
        ┌──────────────────────┐
        │   PROCEDURE REPORT   │
        └──────────────────────┘

        ┌──────────────────────────────────┐
        │     SORT PROCEDURE REPORT:       │
        ├──────────────────────────────────┤
        │                                  │
        │  1 - BY YOUR PROCEDURE CODE      │
        │  2 - BY STANDARD CPT CODE        │
        │  3 - BY YEAR-TO-DATE TIMES       │
        │  4 - BY YEAR-TO-DATE AMOUNT      │
        │  5 - BY TYPE OF SERVICE CODE     │
        │  6 - BY PROCEDURE DESCRIPTION    │
        │                                  │
        │  X - Exit                        │
REPOR   ├──────────────────────────────────┤
        │     Enter Selection > 1          │
        └──────────────────────────────────┘

           Press  BREAK  To Exit.
```

Figure 1-17: Procedure Sort Selection

I - Duplicate Procedure Codes for New DR

Purpose: This option is used to duplicate all procedure codes currently on file for a new provider that has been added your practice. If you use different procedure codes for each provider, then this is a quick way to set-up the procedure file for a new provider.

Sort: No sort is necessary.

Selection: All procedure codes are selected.

Paper: No paper is required.

Procedure: At the Reports Main Menu press $\boxed{1}$ for the "MOS Diagnosis/Procedure Menu" and then press $\boxed{I}$ for the Duplicate Procedure Codes for New DR to run. Run it again for each provider that should be added. If you need to make exceptions to the duplicates then do that in the procedure maintenance option.
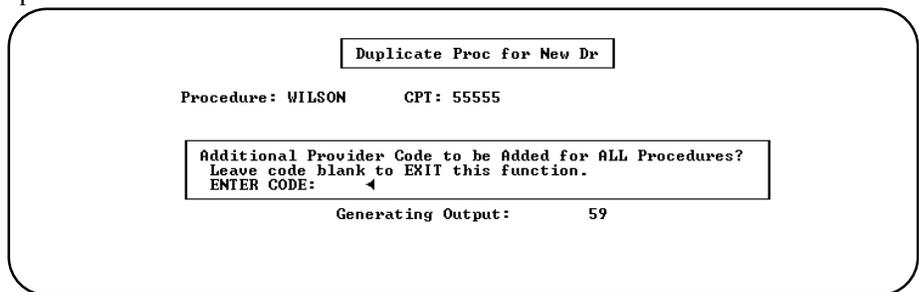
```
                          ┌─────────────────────────┐
                          │  Duplicate Proc for New Dr │
                          └─────────────────────────┘

         Procedure: WILSON      CPT: 55555


                   ┌──────────────────────────────────────────┐
                   │ Additional Provider Code to be Added for ALL Procedures? │
                   │  Leave code blank to EXIT this function.  │
                   │ ENTER CODE:      ◄                        │
                   └──────────────────────────────────────────┘
                        Generating Output:        59
```

Figure 1-18: Duplicate Procedures for New Doctor

J - Procedure Utilization Graphs

Purpose: This option will print a bar graph that is useful in comparing the utilization frequency of various codes YTD for a provider. The percent of the whole of each code is also displayed.

Sort: This will print all procedures by Provider, then break on the first 3 digits of the procedure code and then list all the codes in that group.

Selection: All default procedure codes are selected, or all procedures for a given provider may be selected. This report always reports YTD totals.

Paper: This report requires 8 ½ x 11" paper.

Procedure: At the Reports Main Menu press ⬚1 for the "MOS Diagnosis/Procedure Menu" and then press ⬚J for the Procedure Utilization Graphs. Run it again for each provider that should be printed.

```
Change Printer Selection? (Y/N)  >
```

Press ⬚Y to change the printer destination. Then a prompt to select the which group of procedures should be used to search. Highlight DEFAULT to select from the procedures that are not attached to any particular provider. Select a provider to only select procedures from the ones attached to their provider ID.

```
DEFAULT PROCEDURE CODES
1      - Vicki Henry
11     - Dennis Spanish
12     - John Candy
```

Highlight your choice and press ⬚ENTER . The default procedures have no provider code listed. Then you must list the procedures that should be selected and graphed.

```
ADD A PROCEDURE
START SEARCHING
```

Select "ADD A PROCEDURE" and enter a procedure code. Each code entered will be added to the list. Repeat that for as many codes as you wish to search. If you add one in error, highlight it and press ⬚ENTER . It will be deleted. When all the codes have been indicated, highlight "START SEARCHING" and the report will begin its search. Then the printer selection question will be displayed.

See Appendix C for a sample printout.

K - Update Standard Charges

Purpose: Provides an easy way to change the Standard Charge for procedures. You would run this report when a large number of procedures need to be corrected.

Sort: The report is sorted by procedure code.

Selection: The report selects the procedures for a given provider or all procedures on file.

Paper: Sent to Default Printer, 80 column report with no special printer codes. This will print on standard 8.5" by 11" paper.

Procedure: At the Reports Main Menu press `1` for the "MOS Diagnosis/Procedure Menu" and then press `K` for Update Standard Charges. Then answer the following selection questions:

```
Change Printer Selection? (Y/N)  >
```

Press `Y` to change the printer destination. A slide box is displayed with a list of providers that can be selected. Highlight your selection and press `ENTER`. When updating all providers, the standard default charge is displayed first then it can be assigned to each provider listed for that charge.   Then it will display the next procedure.

```
ALL PROVIDERS
1     -Vicki Henry
11    -Dennis Spanish
12    -John Candy
18    -Ima Badboy
8     -Wilson Pickit
```

We might suggest that you update the ALL PROVIDERS choice first, updating all providers. Then return and select only the providers with varied prices and update just their procedure records.

Highlight your choice and press `ENTER`.

```
Start with what CPT Code:
```

Enter the CPT code you wish to start updating the prices. Leave it blank to start at the beginning of the list.

```
Your Code    - CPT CODE  - Procedure Description
Current Charge: 55.00              New Charge:    >

Enter NEW Standard Charge for CPT CODE or X to Exit
```

Press `ENTER` to leave the charge the same, type a new charge or press `X` to Exit the update. Make a note of the CPT code if you want to return later.

The codes are displayed in order by the YOUR CODE field. So you might want to print a Procedure Report from option G or H, mark the new prices and then use that as a reference when updating the prices.

Then the next procedure is displayed until all procedures have been completed, or press `X` then `ENTER` to cancel the rest of the report.   Note: This report only changes the charge amount for Medicare.

See Appendix C for a sample printout.

L - Procedures by Carrier

Purpose: This option will list procedures by carrier for one or all providers. The type of service can be selected and a date range. Also certain carriers can be excluded from the list.

Sort: By procedure code, carrier code the date of service. This will display subtotals for procedure codes and a line for each carrier.

Selection: All or one provider, type of service or by procedure code, between given dates. Certain carriers can be excluded. The selects from the transaction data and the data is only available until the data is purged in the end of month purge.

Paper: This report requires 8 ½ x 11" paper, using 16.7 pitch font, or print code 13

Procedure: At the Reports Main Menu press **1** for the "MOS Diagnosis/Procedure Menu" and then press **L** for the Procedures by Carrier. Run it again for each provider that should be printed.

```
Change Printer Selection? (Y/N)  >
```

Press **Y** to change the printer destination. A slide box is displayed with a list of providers that can be selected. Highlight your selection and press ENTER . When you select ALL PROVIDERS, an option allows the default price to be applied to all Provider records. Select one provider to update only the prices listed for that provider. We might suggest that you update the ALL PROVIDERS choice first,

```
ALL PROVIDERS
1    -Vicki Henry
11   -Dennis Spanish
12   -John Candy
18   -Ima Badboy
8    -Wilson Pickit
```

updating all providers. Then return and select only the providers with varied prices and update just their procedure records.

Highlight your choice and press ENTER .

```
ENTER TYPE OF SERVICE CODE:
```

Enter the Type of Service code. This may be left blank and then a procedure code may be selected or all procedure codes. Then a prompt for selecting a range of dates will be selected. Remember that data older than your end of month purge cycle may be incomplete. The start date will default to the oldest date possible. Enter the date or press ENTER to accept the default.

The TO date may then be supplied. Press ENTER to accept the default or enter the date to use.

Then a prompt will display your choices and give you a chance to change them before the report is selected. Press **N** or ENTER to run the report.

See Appendix C for a sample printout.