Version 4.2

Quick Start Guide
for Healthcare Providers

patientkeeper®

Desktop Charge Capture™

Physician Information System™

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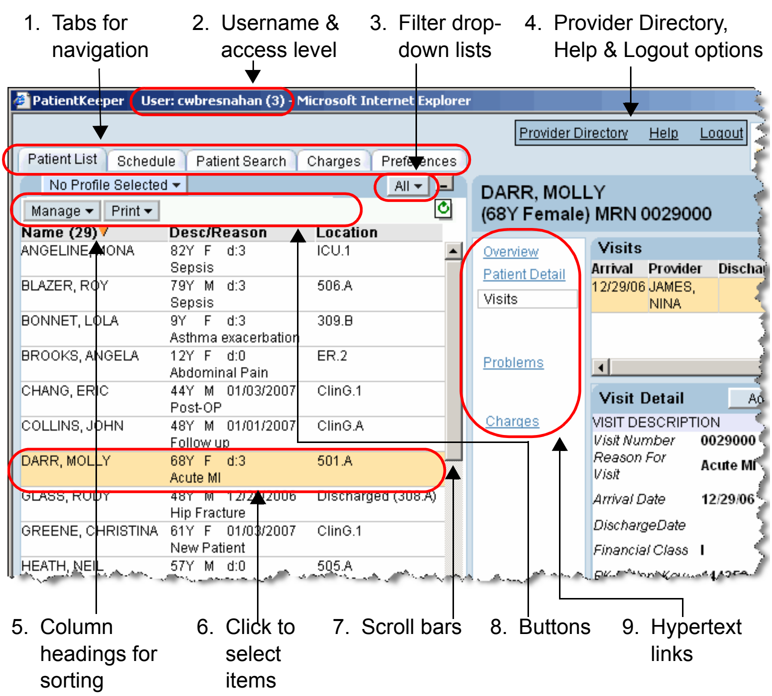
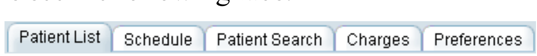
Introduction to Desktop Charge Capture

When you have finished logging in, the **Patient List** tab is immediately displayed. The **Patient List** tab is the main access point for patient information. Many of the elements found on the **Patient List** screen can also be found on the main screens of the other PatientKeeper tabs. These features behave in a similar manner across the entire application, and are described below.



1. Tabs for Navigation

Each major category of information is located on a tab in the PatientKeeper system. Simply click on a tab to view the information contained on it. The number of tabs that are displayed depend upon the options your institution has chosen to implement, as well as your security access level. Most healthcare providers see the following tabs:

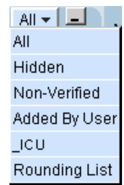


2. Username and Access Level

The title bar of the window displays the name of the user who is currently logged into the system, as well as their access level. If another user leaves the application open on a desktop, you should log them out and log in as yourself prior to using the system.

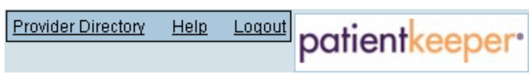
3. Filter Drop-Down Lists

Filters are used to decrease the number of items that are currently displayed on the screen (patients, charges, visits, etc.), allowing you to momentarily focus on a particular subset. Most screens have a pre-defined list of commonly used filters, similar to this filter list found on the **Patient List** tab. Click on the drop-down list to select a filter. Select **All** from any filter list to revert back to the full list of items.



4. Provider Directory, Help, and Logout Options

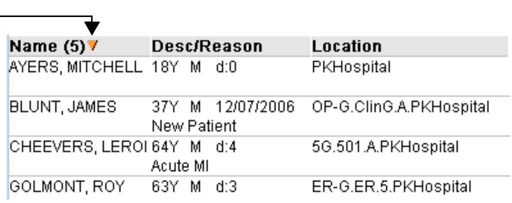
The **Provider Directory**, **Help**, and **Logout** options are located in the upper right corner of every screen. The **Provider Directory** is an optional feature that may or may not be available at your organization. It is similar to a telephone book containing contact information for providers associated with your organization.



5. Column Headings for Sorting

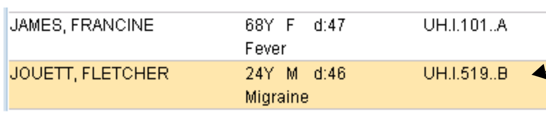
Most columns throughout PatientKeeper can be used to sort the displayed data. Simply click on the column heading once to sort the list in ascending order, and click on it again to sort in descending order.

The orange arrow indicates that this list is sorted in alphabetical order by last name.



6. Selecting Items from Displays of Information

Many screens display information in a table format, consisting of columns and rows. The rows might contain patients, visits, charges, etc. In many instances, you must select a row in order to perform some type of action on it. For example, you must select a patient from your patient list, in order to view a list of their visits. To select a row, just click on it. When a row is selected, the background color changes from white to light orange. To deselect a row, click on it again.



Patient is selected

7. Scroll Bars

When the current display is longer or wider than one page, use the vertical or horizontal scroll bars to view the entries at the bottom or right side of the page.

8. Buttons

Many screens contain buttons that allow you to perform some type of action. For example, on the **Patient List** tab, there are buttons that allow you to add or remove patients from your list. Often, you must select an item prior to clicking a button. For example, you must select a patient visit on the **Patient Search** tab prior to clicking the **Add To Patient List** button.

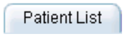
9. Hypertext Links

Hypertext links appear as regular blue or red underlined text. When you click on a hypertext link, the system opens a window that displays information related to the option you are currently viewing. You may or may not be able to change the information displayed in the window. Similar to buttons, you must often select an item prior to clicking on a hypertext link. For example, on the **Patient List** tab you must select a patient prior to clicking on any of the links in this illustration.

10. Icons

There are a variety of standard icons visible on many different screens:

- Printer icon : sends the contents of the current window to the printer. If you would like to see a preview of the printed report on your screen, prior to sending it to a printer, hold down the **Control** key and then click on the **Printer** icon.
- Refresh icon : Throughout the day, data is changed in the system. If you leave a particular option displayed on your desktop for an extended period of time, you will not see the latest information. Click the **Refresh** icon to retrieve the most current information from the database and re-display it on your screen.
- Details icon : Many options contain a **Details** icon whenever a list of patient names or visits is displayed. You can click this icon to view demographic and visit details, to help you confirm whether or not you have selected the correct patient or visit. When you do so, the system displays the standard patient data display screen, which includes demographic, financial, visit, and charge information. See *The Patient List Tab* on page 7 for more information.
- Mark as Viewed icon : Any clinical data (clinical notes or problems) that you have not yet viewed on either the Desktop Charge Capture application or your handheld device are displayed in **bold** typeface, while those that you *have* viewed are displayed in regular typeface. You can click on this icon to mark all of the currently displayed information for a patient as viewed, without having to individually select and display each item on the Desktop Charge Capture application or your handheld device. You might do this if, for example, you had already seen the information in the patient's paper medical record.
- Add Charge icon :Whenever you see the **Add Charge** icon, you can click on to post a charge for the currently selected patient or visit.



The Patient List Tab

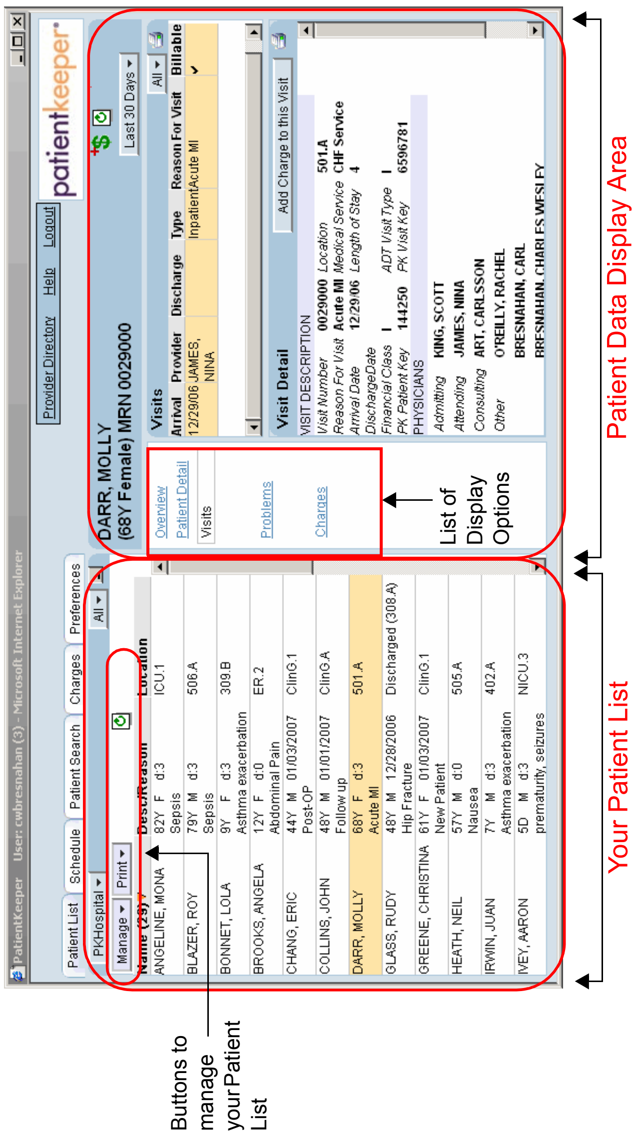
When you first log into the Desktop Charge Capture application, the system automatically displays the **Patient List** tab (see Figure 1 on page 8). This tab contains two major elements: your *short patient list* on the left side of the screen, and a *patient data display area* on the right side.

Your *short patient list* consists of all those patients who have a recent visit, and with whom you have some type of active relationship. For example, you might be the attending physician for a patient’s inpatient visit, or the scheduled provider on a patient’s outpatient appointment.

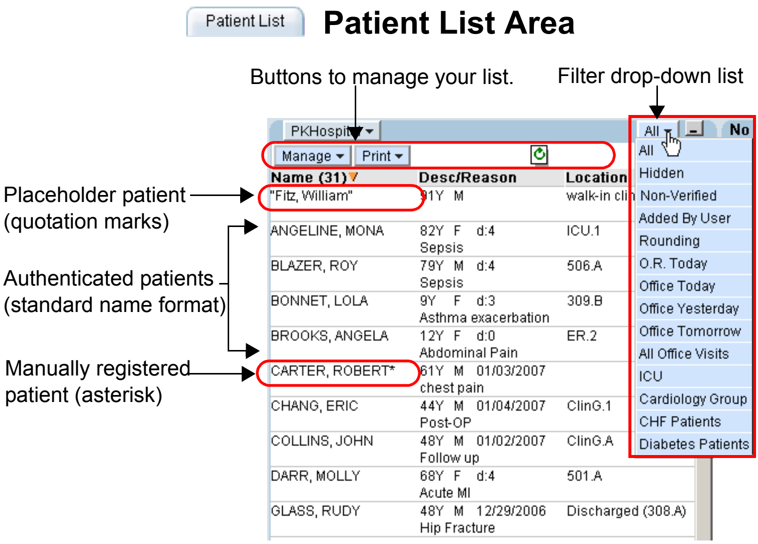
In the patient list area of the screen, you can sort or filter your list, as well as add or remove patients from your list. You may also be able to send patients to other providers’ lists, or choose patients from other providers’ lists and add them onto your own list.

The *patient data display area* is used to display demographic, visit, or charge data for the patients on your short patient list. You can also enter charges for any patient on your list. You must first select a patient from your list prior to displaying information or entering charges.

Figure 1: Patient List Tab



Patient List Area



Your patient list is located on the left side of the **Patient List** tab. There are a variety of possible sources for these patients:

- **Authenticated patients**: these are standard patients that have been registered on a backend system, such as Cerner® or MEDITECH®. They are displayed in standard name format.
- **Non-Verified patients**: these are the temporary patients that you have manually created on your handheld device. You would do this if you needed to enter forms or charges for a patient who had not yet been registered on your backend system. Their names are enclosed in quotation marks. Non-verified patients can also be converted to manually registered patients, either automatically or by ancillary staff, once complete demographic data has been obtained (see next bullet).
- **Manually registered patients**: these are patients that are manually registered directly in the Desktop Charge Capture application by ancillary staff (an optional feature that your institution may or may not have implemented). These are patients, who for a variety of possible reasons, were not registered on your backend system. They have an asterisk appended to the end of their names.

Use the drop-down lists found on this portion of the screen to manage the *contents* of your short patient list:

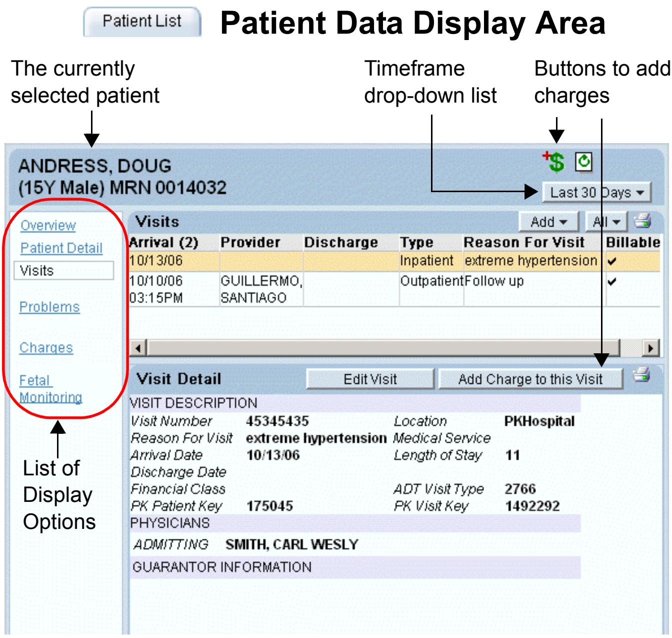
- **Manage** drop-down list: enables you to manage your patient list. The **Manage** drop-down list provides several options by which you can manage the contents of your patient list. You can select one of the following options, depending on the privileges granted in your user profile:
  - **Add Patient** option: allows you to select patients from other providers' lists and add them to your own list. You might need to add a patient to your list if, for example, another provider asked for your assistance in caring for one of their patients. When you select the **Add Patient** option, a search screen appears. Search for the patient you want to add by entering some identifying information, select the patient from the resulting list, define your relationship to the patient (consulting, attending, interested party, etc.), and then click on the **Add** button.
  - **Remove Patient** option: allows you to remove patients from your list. You might remove a patient from your short list if an outpatient appointment had been cancelled, or if another provider saw the patient instead of you. When you click on the **Remove** button, a screen appears showing your entire short patient list. Select any patients you want to remove, and then click on the **Remove** button.
  - **Get Patients from Another User** option: allows you to get patients from other providers. You might need to get patients from a provider who is going off duty, and wishes to pass their patients on to you if you are coming on duty. When you select this option, the **Get Patients from Another User** screen appears. you should then identify the exiting provider, select some or all of the patients from that provider's list, define your own relationship to those patients, and then click on the **Add** button.

- **Send Patients to Another User** option: allows you to take one of the patients on your short list and add it to another provider's list, which is known as *sending* the patient, or *patient handoff*. You might do this if you wished to consult with another provider regarding a particular patient's care. When you select this option, a screen appears showing your entire patient list. Select any patients you want to send, search for and select the receiving provider, and then click on the **Send** button. (**Note**: The patient is now on the recipient's list *and also* still on your own list.)

- **Print** drop-down list**:** provides several print options, depending on the privileges granted in your user profile. The standard print options allow you to print: a copy of your patient list, or a standard rounding report based on your patient list.
- **Profile** drop-down list: this drop-down list controls the profile that is currently active for your web session. Profiles are a combination of settings that allow you to optimize both the amount and composition of patient data currently displayed on the screen and are generally used when a provider works in more than one facility or location. An administrator (or any user) can design a profile for each location, thereby allowing the user to switch the list of patients that is currently displayed. To apply a profile to your patient list, click on the **Profile** drop-down list, and select a profile name. If you are unsure of what a particular profile will do, hold your mouse pointer over the name of the profile in question, and the system displays a description of it. Since you can apply different profiles on the Desktop Charge Capture application and on your handheld device, the **Profile** drop-down list displays a handheld device icon next to the profile that is currently selected on your handheld device (if you use one).
- **View filter drop-down list**: view filters are applied *after* profiles. You can use view filters to temporarily decrease the number of patients who are displayed in the patient list area

of your screen. Your department administrator may have designed filters that are useful in your department. For example, there might be filters that enable you to view just the patients in a particular location or of a particular visit type. In addition, you may design your own personal view filters (please refer to the *Desktop Charge Capture User's Guide* for detailed instructions).

- **Minimize/maximize** button: You can minimize the size of the Patient List, and thereby increase the size of the Patient Data Display area, by clicking on the minimize/maximize button. The Patient Data Display area then takes advantage of the full screen when displaying detailed patient information. The Patient List shrinks to the top left corner of the screen, and a **Select Patient** button appears in that area. To select a different patient while leaving the Patient List minimized, click the **Select Patient** button. A small version of your patient list appears: just click on the name of the patient whose information you want to view now.

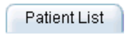


The Patient Data Display area is located on the right side of the **Patient List** tab. Use this portion of the screen to show detailed information about any patient on your list, or to enter charges. To see detailed patient information, you must first select a patient from your patient list by clicking on their name, and then select an item from the list of display options.There are three main elements that control this portion of the screen:

- **Timeframe drop-down list**: use this drop-down list to define the date range of the information you wish to view.
- **Buttons for adding charges**: if you have appropriate security, there may be several buttons or icons available for posting charges to the currently selected patient. These are discussed more fully in the section entitled *Adding Charges for a Patient* on page 27.
- **Display options**: select the type of information you want to display. You may choose from **Overview**, **Visits**, **Patient Detail, Problems**, **Clinical Notes** (optional feature), or **Charges**. PatientKeeper can also create custom links to external systems, such as on-line reference tools, other

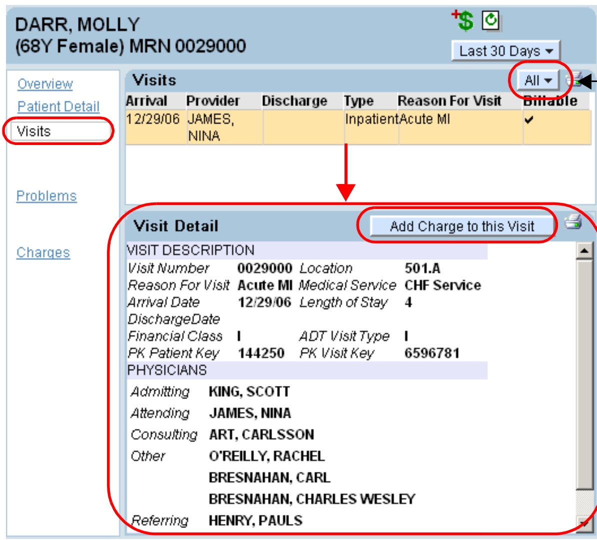
hospital information systems, etc. If your organization has implemented such as link, it may be listed here (for example, see **Fetal Monitoring** in the illustration above). You may be required to enter a username and/or password for the external system the first time you attempt to access it.

Note: The Patient Data Display can also be accessed by clicking on the **Details** icon from any other option in the PatientKeeper system.

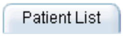


Displaying Visits

This option displays a summarized list of the patient's inpatient and outpatient visits.

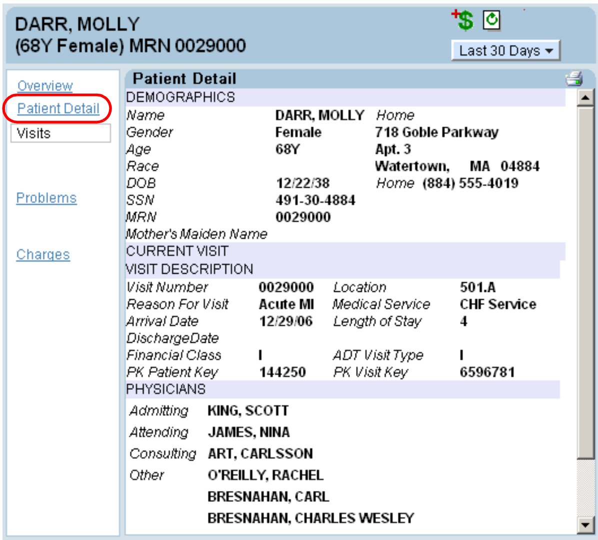


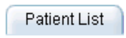
- To filter the **Visits** summary display by type of visit, click on the drop-down filter list located in the upper right corner of the **Visits** window.
- To view detailed information for any specific visit, click on that visit's row. A **Visit Detail** window opens below the summary list. The detail screen contains slightly different information, based on whether the visit is inpatient or outpatient. For example, inpatient visits show arrival/ discharge dates and admitting provider, while outpatient visits show appointment date and scheduled provider.
- To post charges for a particular visit while viewing the visit details, click on the **Add Charges to this Visit** button, located in the upper right corner of the **Visit Detail** window.



Displaying Patient Details

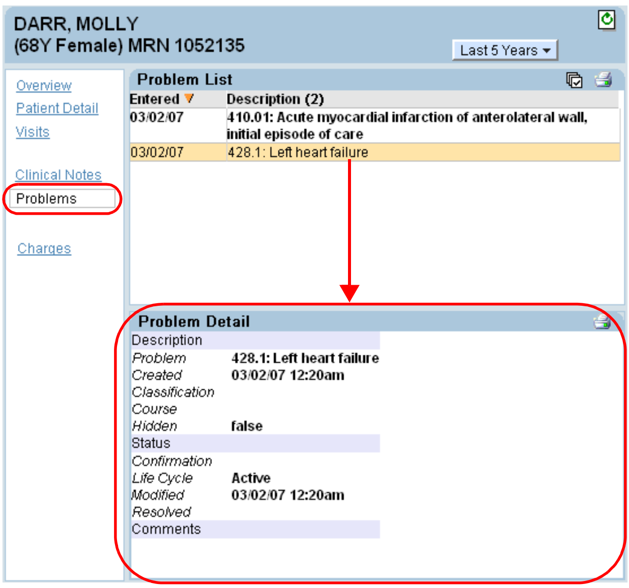
This option displays basic demographic information about the patient, as well as the details of their most recent visit.



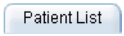


Displaying Problems

This option displays a patient's history of diagnoses. Each time a charge with a diagnosis code is posted for a patient, that diagnosis is added to the patient's problem list. Providers can also enter diagnoses for their patients using the Problem List module on their handheld device.



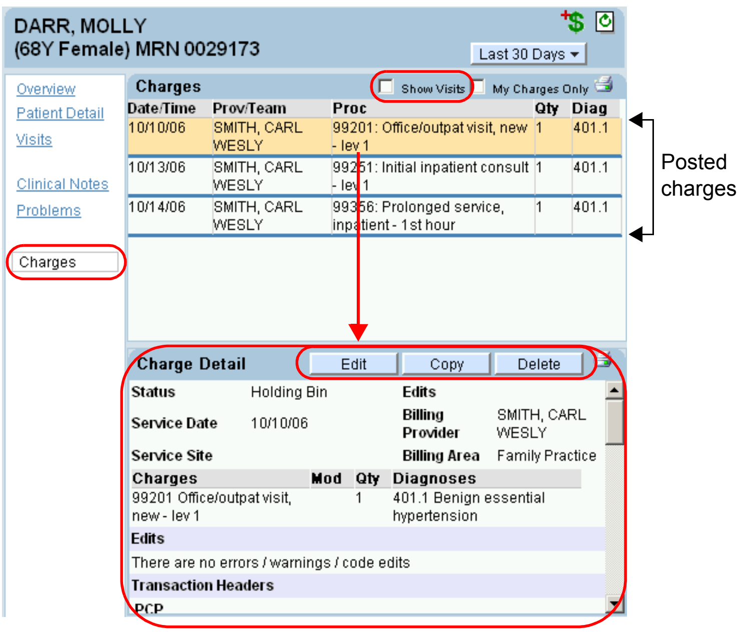
- To view detailed information for any specific problem on the list, click on its row. A **Problem Detail** window appears below the summary list.



Displaying or Editing Charges

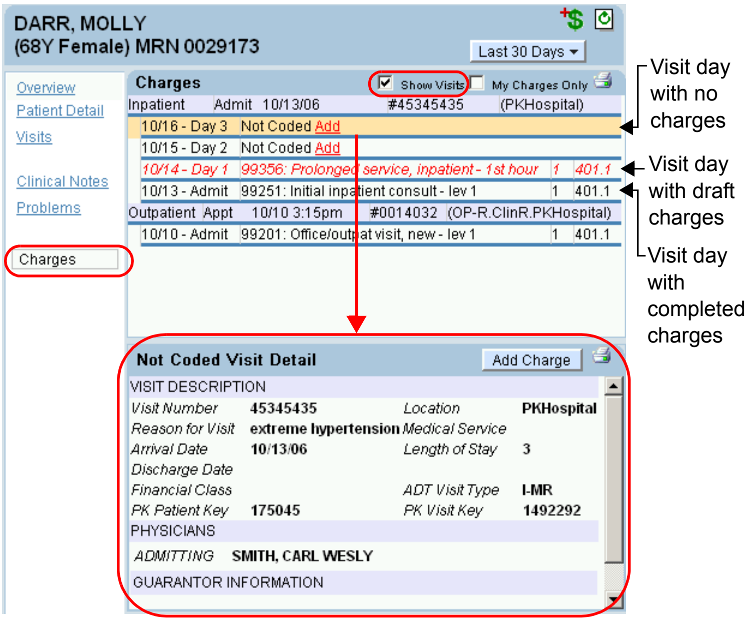
This option displays charge transactions for a particular patient. You can use the **Show Visits** check box to toggle between viewing a list of *actual* posted charges, and a list of visit dates on which charges were *expected* to be posted.

- When the **Show Visits** option *is not checked*, the summary window shows information for each posted charge transaction: date, billing provider/team, procedure codes and descriptions, quantity, and diagnoses.

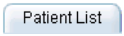


- To see further information about a particular charge, click on it. A **Charge Detail** window opens below the summary display.
- To edit, copy, or delete a charge, click on the buttons of the same name in the **Charge Detail** window. (**Note**: the charge can only be edited or deleted if it has not yet been sent to the Outbox for final billing.)

- When the **Show Visits** option *is checked*, the summary window shows each visit with the dates that the patient was present at your facility, along with information about whether or not a charge was posted for each visit day.

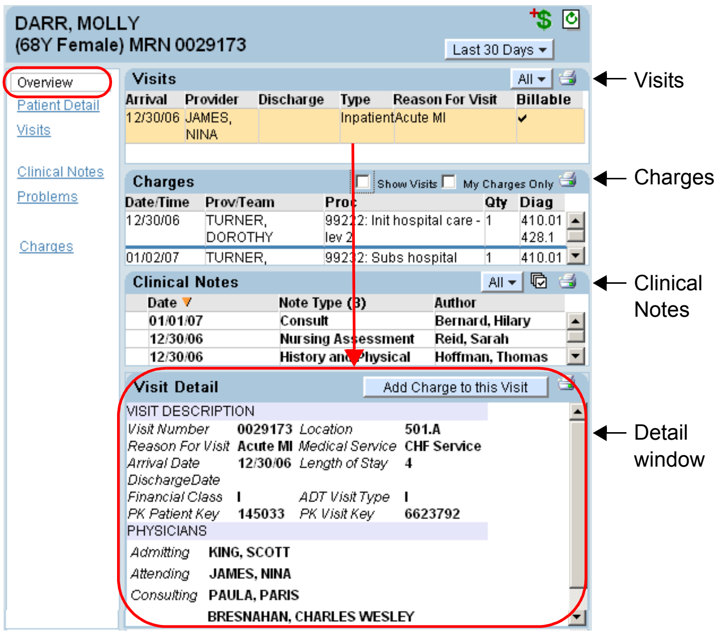


- Visit days that display "Not Coded Add" are visits for which charges have not yet been posted. Click on the Add link to post a charge to this visit (with the correct service date).
- Charge codes and descriptions that are printed in red text are draft charges.
- Charge codes and descriptions that are printed in black text are completed charges.
- To see further information about a particular visit day, click on that day. A **Not Coded Visit Detail** window opens below the summary list if the visit day does not yet have charges posted. The **Charge Detail** window opens if the visit does have charges posted.

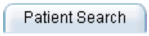


Displaying an Overview

This option displays a high-level summary of the patient. It is a composite of three other display options: **Visits, Clinical Notes** (optional feature), and **Charges**. The overview simply stacks these displays one above the other, to facilitate viewing different types of information all in one glance.



- To see more detailed information about a particular visit, charge, or clinical note, click on the row containing that item. The system opens the appropriate detail window for that item in the bottom right corner of the screen.



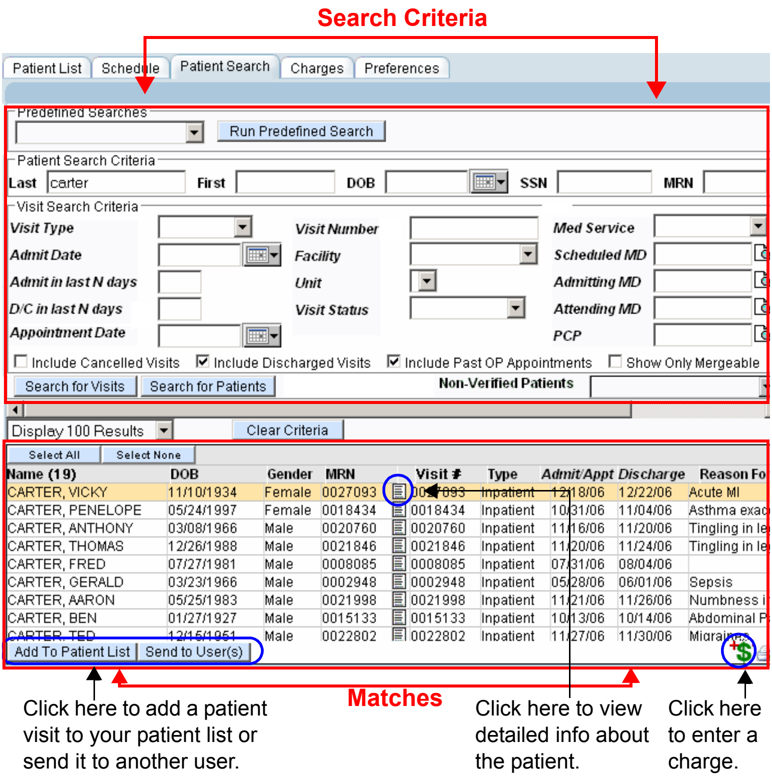
The Patient Search Tab

Your institution may have chosen to implement the **Patient Search** tab. The primary difference between the **Patient List** and **Patient Search** tabs is that the **Patient List** tab is used for patients who *are* on your short patient list, while the **Patient Search** tab can be used to display information about *any* patient (both those that are and are not on your short patient list). On the **Patient List** tab, the patients on your short patient list are already pre-selected for you and displayed on the left side of the screen. On the **Patient Search** tab, you must first search for a patient, before you can perform any activities.

1. Click on the **Patient Search** tab to display the **Select Patient** window, where you can search for the patient you wish to view.
2. Use any combination of the search fields at the top of the screen to identify the patient or visit you wish to view, and then click on the **Run Predefined Search**, **Search for Visits**, or **Search for Patients** button. (**Note**: the **Run Predefined Search** button is an optional feature that may not appear on all systems.)
   - The **Run Predefined Search** and **Search for Visits** buttons let you search for patient visits. It returns *one entry per visit* for the patient. If a patient has had multiple visits that match your search criteria, each of those visits is listed. Keep in mind that if a patient does not have any visits that match your criteria, then they do *not* appear in the search results. You might use one of these buttons if you want to find a specific patient visit to add to your short patient list, or to send to another user.
   - The **Search for Patients** button lets you search the complete patient list, regardless of whether or not the patient has had any visits. The **Search for Patients** button returns only *one entry per patient record*. You might use this button if you simply want to display

demographic, visit, charge, or clinical data, regardless of the visit it is associated with.

At the bottom of the screen, the system displays all patients or visits that match the criteria you entered.

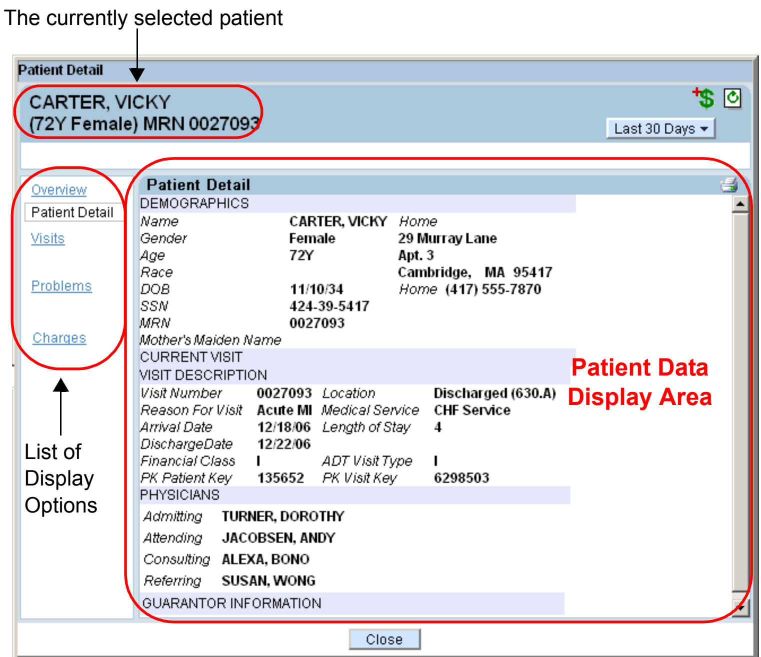


3. Click on a patient or visit to select it.

   ❖ To add a specific visit to your short patient list, or to send the visit to another provider, click the **Add to Patient List** or **Send to User(s)** button, respectively.

   ❖ To enter a charge for the selected visit or patient, click on the **Add Charge** icon (see *Adding Charges for a Patient* on page 27).

❖ To view all of the data associated with the patient, click on the **Details** icon. The system opens a display window that is identical in functionality to the Patient Data Display area on the right side of the **Patient List** tab (see *Patient Data Display Area* on page 14).



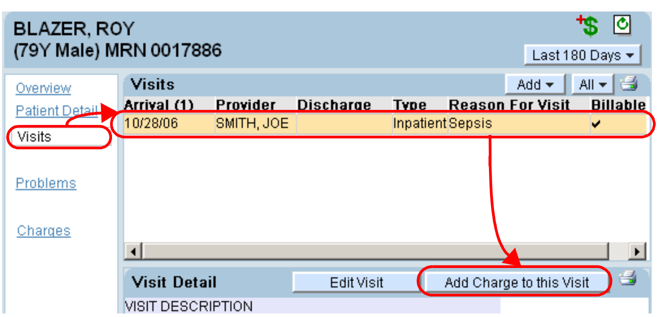
Adding Charges for a Patient

This section reviews how to enter charges from the **Patient List** tab, since it is one of the most common options used by providers to enter charges. However, there are a variety of other options from which charges may be entered, including:

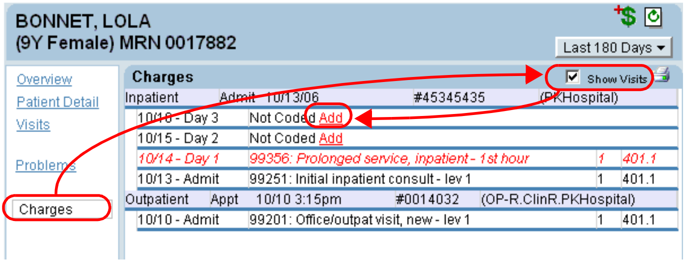
- *The Patient Search Tab* on page 24
- *The Schedule Tab* on page 32
- *Patient Charge Status* on page 36
- *Worklist* on page 39
- *Search* on page 41

Regardless of which option the user selects to initiate the charge entry process, the functionality of the Charge Transaction screen that is used for entering those charges is identical. There are three ways to access the Charge Transaction screen from the **Patient List** tab. The method you use simply depends on the information you happen to be viewing at the time you decide to post a charge:

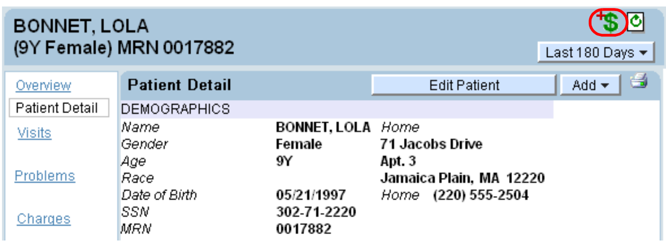
- While using the **Visits** display item to review a patient's visits, you may see the visit for which you intended to post charges. If you click on it to select it, the resulting **Visit Detail** window contains an **Add Charge to Visit** button. You can click on this button to post a charge for this specific visit.



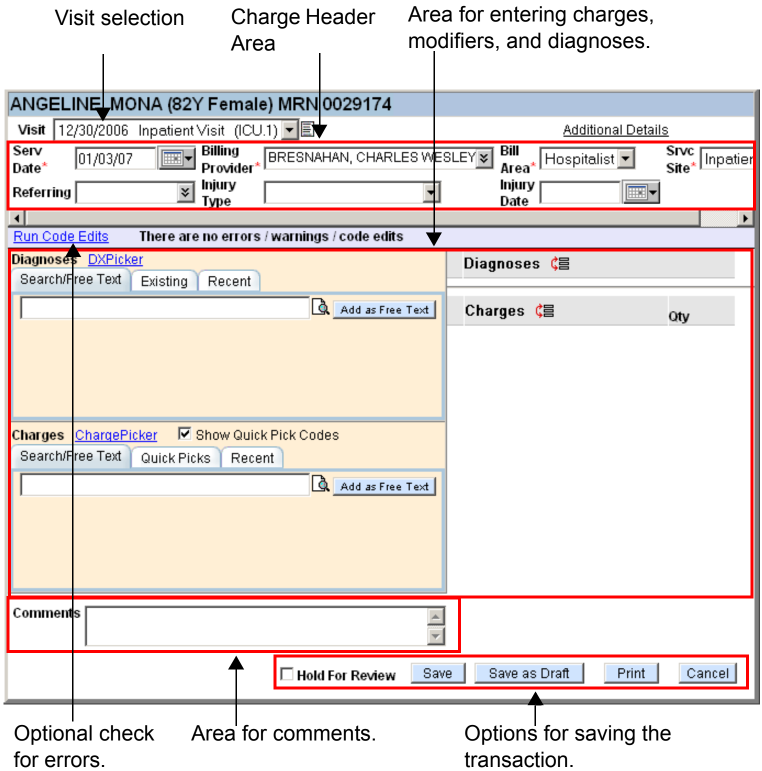
- While using the **Charges** display item to review a patient's charges, you can click on the **Show Visits** check box. Each date that the patient was present at your facility is listed, along with information about whether or not a charge was posted on that date. Items that display "Not Coded Add" are visits for which charges have not yet been posted. If the date for which you intended to post charges has this status, click on the Add link to post a charge to this visit.



- You may decide to add charges to the patient, without first using the **Visits** or **Charges** display item. To do so, click on the **Add Charge** icon (a dollar sign $) located in the top right corner of the Patient Data Display area, above the **Timeframe** button. (If you use this method, depending on how your system is configured, you may be required to select an appropriate visit on which to post the charge, or the system may automatically select a visit for you.)



Regardless of which of the three buttons you used, the system now opens the Charge Transaction screen.



1. Enter charge header information: the charge header area contains information that applies to the entire charge transaction. To enter or change any of these fields, simply click on them.

2. Enter diagnoses. Depending on how your system is configured, you may see one or more of these options: **DxPicker**, **Search/Free Text**, **Existing**, or **Recent**.

   - Use the **DxPicker** link to search from a *categorized list of the most commonly used diagnoses*.
   - Use the **Search/Free Text** tab to search for a diagnosis from the *entire list of diagnoses*, or to enter a free text diagnosis if you cannot find the one you want.

- Use the **Existing** tab to select from a list of the patient's existing diagnoses (codes that have been previously used for this patient).
- Use the **Recent** tab to view a list of all the diagnoses that you have used recently (for any patient) when entering charge transactions.

3. Enter charges. Depending on how your system is configured, you may see one or more of these options: **ChargePicker**, **Search/Free Text**, **Quick Picks**, or **Recent**.
   - The **Search/Free Text** and **Recent** features work the same as they do for diagnosis codes.
   - Use the **ChargePicker** link to search from a categorized list of the most commonly used charge codes and *macros*. (A macro is a group of several commonly used procedures, modifiers, and/or diagnoses that have been linked together. You simply choose the macro and all of the items in that group are automatically posted for you. For instructions on how to create personal macros, please refer to the *Desktop Charge Capture User's Guide*.).
   - Use the **Quick Picks** tab to select from a short list of codes and macros that were designated as *high frequency* items, or the codes and macros that you would expect to use most often when billing for this type of visit.
4. If desired, enter free text comments in the **Comments** field. If you are holding a charge for review or saving it as a draft (see below) you might find it useful to enter the reason in this field.
5. Save your work:
   - To save a completed transaction, click the **Save** button.
   - If you know the charge is incomplete and want to save your work until you had time to enter the remaining details, click the **Save as Draft** button. Draft charges have a status of "Draft" in various displays of charge data. When you have time to complete the draft charge, simply select it on the **Patient List** tab and click the **Edit**

button (see *Displaying or Editing Charges* on page 21). Enter the missing information, and then click **Save**.

- To hold the transaction for review, check the **Hold for Review** check box and then click the **Save** button. This flags the charge for administrators or supervisory physicians, who can then review the charge and make any necessary corrections before billing. (**Note**: the **Hold for Review** checkbox appears only if your institution has chosen to implement this feature.)

The Charges Tab

The **Charges** tab provides reporting and review functions related to the Desktop Charge Capture application. Healthcare providers can review the status of charges for each of the patients on their short patient list, review a worklist of charges with outstanding billing issues, examine charges that have been held for review, or generate custom billing reports.

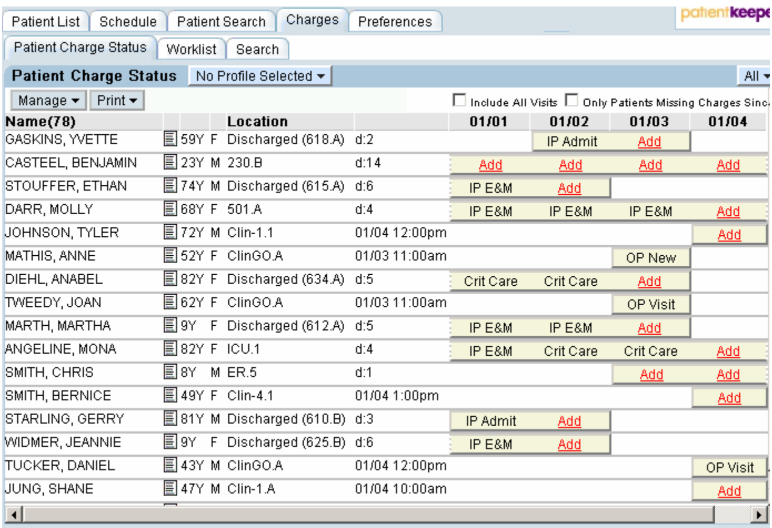
Depending on the access granted by your system administrator, you may be able to see only your own charges, all charges in your department, or all charges in the institution.

When you click on the **Charges** tab, the system displays a second row of tabs. The second-row tabs include **Patient Charge Status**, **Worklist**, and **Search**.

- See *Patient Charge Status* on page 36
- See *Worklist* on page 39
- See *Search* on page 41

Charges Patient Charge Status

The **Patient Charge Status** report is used as an aid to charge entry. It is one of the most common tabs from which to enter charges, as it shows you each patient's charge status for each visit day at your health organization. You can quickly see which days already have charges posted, and which do not, for all of the patient's on your short patient list. Patient Charge Status reports can have reporting periods ranging from 1 day to 15 days -- the example below contains 4 days worth of data.



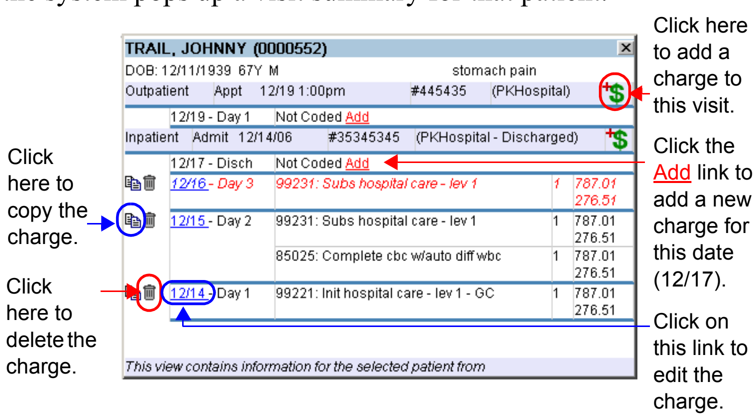
Name(78)			Location		01/01	01/02	01/03	01/04
GASKINS, YVETTE	59Y	F	Discharged (618.A)	d:2		IP Admit	Add	
CASTEEL, BENJAMIN	23Y	M	230.B	d:14	Add	Add	Add	Add
STOUFFER, ETHAN	74Y	M	Discharged (615.A)	d:6	IP E&M	Add		
DARR, MOLLY	68Y	F	501.A	d:4	IP E&M	IP E&M	IP E&M	Add
JOHNSON, TYLER	72Y	M	Clin-1.1	01/04 12:00pm				Add
MATHIS, ANNE	52Y	F	ClinGO.A	01/03 11:00am			OP New	
DIEHL, ANABEL	82Y	F	Discharged (634.A)	d:5	Crit Care	Crit Care	Add	
TWEEDY, JOAN	62Y	F	ClinGO.A	01/03 11:00am			OP Visit	
MARTH, MARTHA	9Y	F	Discharged (612.A)	d:5	IP E&M	IP E&M	Add	
ANGELINE, MONA	82Y	F	ICU.1	d:4	IP E&M	Crit Care	Crit Care	Add
SMITH, CHRIS	8Y	M	ER.5	d:1			Add	Add
SMITH, BERNICE	49Y	F	Clin-4.1	01/04 1:00pm				Add
STARLING, GERRY	81Y	M	Discharged (610.B)	d:3	IP Admit	Add		
WIDMER, JEANNIE	9Y	F	Discharged (625.B)	d:6	IP E&M	Add		
TUCKER, DANIEL	43Y	M	ClinGO.A	01/04 12:00pm				OP Visit
JUNG, SHANE	47Y	M	Clin-1.A	01/04 10:00am				Add

The left side of the screen contains your short patient list, with the normal buttons to manage the contents of that list (**Manage** and **Print**). Each button on the right side of the screen represents a visit day, and contains the following information:

- A **Category Name** displayed in black indicates that there is a completed charge for a particular category. For example, if the button says "IP Admit" it indicates that there are one or more completed charges in the "IP Admit" category.
- A **Category Name** followed by the word *(Draft)* in red parentheses and italics indicates that there are draft charges for a particular category. For example, *IP Admit (Draft)* indicates a draft charge in the IP Admit category.

- **-Multi-** indicates that the charges in the transaction are from multiple categories.
- A **Plus Sign** to the right of the category (for example **Other+)** indicates that there is more than one charge transaction for the same visit day. For example, two providers might each have entered a charge transaction for the same visit date.
- Buttons that have an Add charge link indicate that a charge has not yet been entered for that day. Click Add to open the Charge Transaction window and add a charge for this patient visit. For more information on entering charges, please refer to *Adding Charges for a Patient* on page 27.

When you click on any patient name, or on any button on the right side of the screen (other than a button that has an Add link), the system pops up a visit summary for that patient.



The summary displays a light blue header for each visit, with the individual days contained within the visit indented below. Each visit day indicates whether:

- A completed charge was already posted, in black (see 12/14 and 12/15)
- A draft charge was posted, in red (see 12/16)
- No charge was posted, as indicated by "Not Coded Add" (see 12/17)

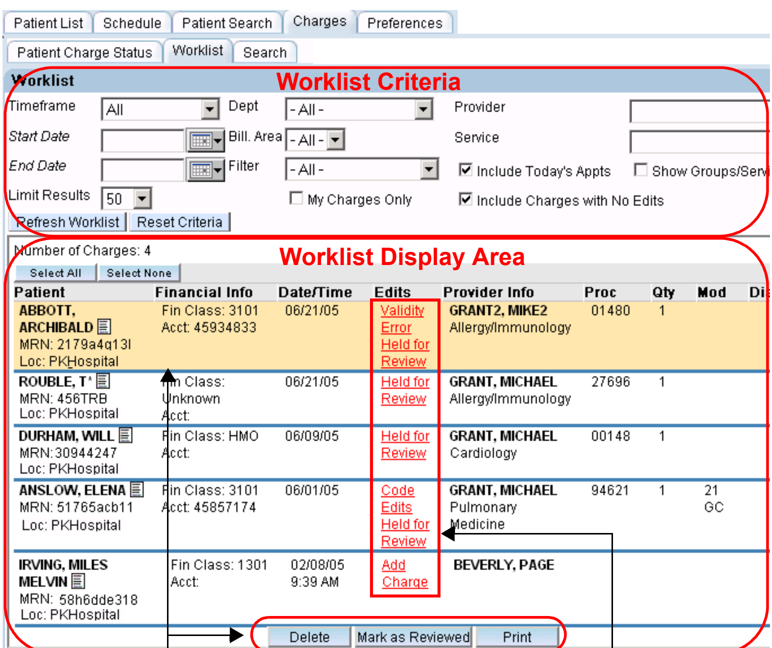
You can take any of these actions from the visit summary:

- Copy a charge to create a similar transaction with a new visit date, by clicking on the **Copy** icon.
- Delete a charge by clicking on the **Trash Can** icon (if it is a draft, or still in the Holding Bin).
- Edit a charge, by clicking on the visit date link (for example, 12/14).
- Enter a new charge, by clicking on an Add link, or by clicking on the **Add Charge** icon.

Worklist

The **Worklist** report is used as a tickler file to identify visits with potential or actual billing errors, visits for which charges have not yet been posted, and visits which have been held for review. Essentially, for any given physician, this is his file of work to be done. While viewing the report, a physician can immediately add, edit, delete, or review charges.

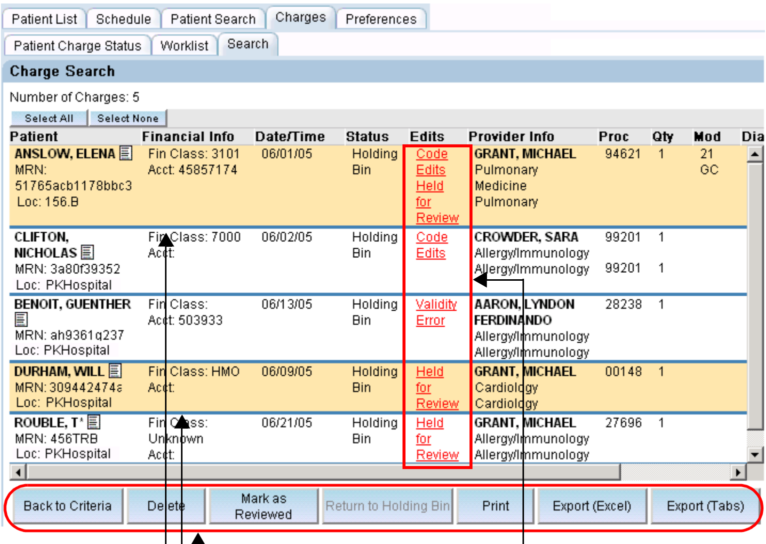
The **Worklist** screen is broken into two major sections: the criteria area at the top of the screen, and the worklist display at the bottom.



Click on a row (or rows) to select it, and then click on a button.

Hypertext links to charge transaction screen.

After defining your criteria, click on the **Show Charges** button at the bottom of the criteria screen. The system searches the database and displays all charges that match your selection criteria.



Click on a row (or rows) to select it, and then click on a button.

The **Edits** column contains hypertext links to the charge transaction screen.

- If you included the **Edits** field as one of your report columns, you can now click on the hypertext links in that column to add or edit charge transactions (similar to the **Worklist** tab).
- To delete a charge transaction or mark it as reviewed, click on the transaction's row to select it, and then click on the **Delete** or **Mark as Reviewed** button. (**Note**: you must have appropriate privileges to perform these activities.)
- Click on the **Print** button to send the report results to a printer.
- Click on the **Export (Tabs)** button to export the results to a tab delimited file, or click on the **Export (Excel)** button to send them to a Microsoft Excel™ spreadsheet.

Helpful Tips

1. *Save the web address of the PatientKeeper system in your Favorites folder.*
2. *Turn off your internet browser's pop-up blocker when using the PatientKeeper system.*
3. *Use the* Patient List *tab to view all demographic, visit, and charge data for your patients.*
4. *Use the* Patient Search *tab to view all demographic, visit, and charge data for other provider's patients.*
5. *Enter charges as soon as possible after providing services.*
6. *Use the* Patient List *or* Patient Charge Status *tab to enter new charges for your patients.*
7. *Use the* Patient Charge Status *tab (located under the* Charges *tab) to quickly review the charge status of all the patients on your short patient list.*
8. *Heed the system's charge warnings and make appropriate changes to the transaction.*
9. *If you are a reviewing provider, use the* Worklist *tab (located under the* Charges *tab) to review your associate's charges daily.*

For help, contact your system administrator.

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Phone: 1-888-994-2443
E-mail: support@patientkeeper.com