

What's New in 9.5.28

April

2017

This document was developed by Genius Solutions to introduce users to the features/modifications that have been released in 9.5.28 of eTHOMAS. Click on the text or page numbers within the Contents page to be brought to that specific item within the document.

eTHOMAS

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Code Files

Insurance Codes

The ability has been added to put a website address in an insurance code, as well as any additional notes about that company. *Note: These notes are stored per system and not per user. Any user that has access to insurance codes will see the note.*

The screenshot shows the 'Insurance Codes' window. It includes fields for Code, Name, Address, Zip, City, State, Contact, Phone, Fax, Effective, Expiration, Filing Limit, Warning Limit, Default Financial, OCNA, NPI Indicator, and several checkboxes for billing and referral options. A table titled 'Insurance Payors ID' lists various payor IDs and claim offices. A 'Notes' section is highlighted with a red box, containing the text 'THE OFFICE IS ONLY OPEN UNTIL 1PM'. The 'Website' field is also highlighted with a red box, showing 'BCBSM.COM'.

| Form Group | Payor ID | Claim Office |
|------------|------------|--------------|
| ALBC | PAYORID | |
| ANSIFL | 1234 | |
| ANSIFLMD | 00710 | |
| ANSIMI | PAYOR-ID | |
| ASH | 00710 | |
| BCAR | BCAVAILITY | |
| BCBSIL | 456456 | |
| CBBC | CAPITAL | |

Once an email address has been entered, save the information. Upon entry into that code again, there will be a link to click on that will take you directly to that website.

| Form Group | Payor ID | Claim Office |
|------------|------------|--------------|
| ALBC | PAYORID | |
| ANSIFL | 1234 | |
| ANSIFLMD | 00710 | |
| ANSIMI | PAYOR-ID | |
| ASH | 00710 | |
| BCAR | BCAVAILITY | |
| BCBSIL | 456456 | |
| CBPO | CAPITAL | |

Patient Types

Users can now have a Patient Type that is up to six characters long.

Reports

Delinquent Claims Report

The Delinquent Claims Report's Date Type field will now default to "Claim Date" rather than "Last Billed".

Claim Filing Limits

Insurance companies often have a limit to the number of days from the date the patient is seen, to the date a clean claim must be received. This is called the Claim Filing Limit. A new report has been created to help assist offices in identifying claims that are approaching their Claim Filing Limit.

Filing and Warning Limits

To use this feature, each insurance code should be set up with that insurance's filing limit, as well as when the outstanding claims should begin to appear on the Claim Filing Limit Report. To do this, go to Code Files | Insurance | Insurance. Open the insurance code that you would like to fill out. The Filing Limit and Warning Limit must be filled out together. If the filing and warning limits are not filled out, all of that insurance's claims will show up on the report.

Insurance Codes

Code: UNHC
 Name: UNITED HEALTHCARE
 Address: PO BOX 30555
 Zip: 84130-0555
 City: SALT LAKE CITY State: UT
 Contact:
 Phone: 800-842-0231 Fax:
 Effective: Expiration:
 Website:

Default Financial:
 OCNA:
 NPI Indicator:

☒ Participate ☐ Requires Doctor ID
☐ Accept Assignment ☐ Print DX Description
☒ Allow Electronic Billing ☐ TaxID in 2310b
☐ Requires Referral ID ☐ Rmv 2000a PRV seg
☐ ICD10 exemption

Filing Limit: 90 Warning Limit: 60

Insurance Payors ID
 UNHC - UNITED HEALTHCARE

| Form Group | Payor ID | Claim Office |
|------------|----------|--------------|
| ANSIMI | 87726 | 0010 |
| CLEAR | 87726 | 0010 |
| PROXMD | 87726 | 0010 |
| UHIN | 87726 | 0010 |

Notes:

Groups Fee for Service Box 33
 Ins Profiles Doctors Alternate Fees

Claim Filing Limit Report

The Claim Filing Limit Report will alert your office to any claims that are reaching their filing limit. Once the number of days past the Warning Limit has arrived, the claim will begin to appear on the report. The claim date is used to determine the number of days old.

CLAIM FILING LIMIT REPORT

☐ Print Report Explanation
☐ Detail

Location: System Summary
 Doctor Code: System Summary
 Financial Code:
 Insurance Code:
 Claim Type: System Summary

☐ Exclude Claims Past Filing Limit
☐ Include Insurance Notes

MS Excel

The fields available are:

- **Detail** – Check this box if you would like to see the transaction detail of the outstanding claim.

- **Location**- You may run this report by System Summary, All Locations or a specific location.
- **Doctor Code** - You may run this report by System Summary, All Doctors or a specific doctor code.
- **Financial Code** – (optional) Enter a financial code to get results for only that code.
- **Insurance Code** – (optional) Enter an insurance code to get results for only that code.
- **Claim Type** – (optional) Choose a claim type to get results for only that code.
- **Exclude Claims Past Filing Limit** – Check this box to exclude claims that have already passed their filing limit from showing on the report.
- **Include Insurance Notes** – Check this box to include notes from the insurance code.

| UNHC UNITED HEALTHCARE SALT LAKE CITY UT 84130-0555 800-842-0231 | | | | | | | | | |
|--|------------|----------|------------|------------|--------|---------|------|------------------------------------|------|
| | | | | | | | | PO BOX 30555 | |
| | | | | | | | | Filing Limit: 90 Warning Limit: 60 | |
| Name/AcctNo | DOB | Claim# | ClaimDt | TranDt | Amount | Balance | Days | CN/*SSN | Type |
| SMITH, JOE - 1550 | 12/11/1956 | 1234604P | 01/18/2017 | 01/18/2017 | 100.00 | 100.00 | 65 | 666335252 | |
| SMITH, JOE Totals: | | | | | 100.00 | 100.00 | | | |

Claim Filing Limit Report

| UNHC UNITED HEALTHCARE SALT LAKE CITY UT 84130-0555 800-842-0231 | | | | | | | | | |
|--|------------|----------|------------|------------|-------------|----------|-------|------------------------------------|------|
| | | | | | | | | PO BOX 30555 | |
| | | | | | | | | Filing Limit: 90 Warning Limit: 60 | |
| Name/AcctNo | DOB | Claim# | ClaimDt | TranDt | Amount | Balance | Days | CN/*SSN | Type |
| SMITH, JOE - 1550 | 12/11/1956 | 1234604P | 01/18/2017 | 01/18/2017 | 100.00 | 100.00 | 65 | 666335252 | |
| | | | | | ServiceDate | Proc | Cpt | POS | |
| | | | | | Charge | Expected | Paid | Balance | |
| | | | | | 01/18/2017 | 99213 | 99213 | 3 | |
| | | | | | 100.00 | 100.00 | 0.00 | 100.00 | |
| SMITH, JOE Totals: | | | | | 100.00 | 100.00 | 0.00 | 100.00 | |

Claim Filing Limit Report with Detail

Statements

Electronic Statements via gsTransport

Electronic Statements and Profit Recovery files can now be sent through GS Transport. When you click on the Send button within the Statement Prepare screen, the program will no longer open the Data Sender program, but instead the file will automatically be sent through GS Transport.

Statement Prepare

Patients Found: 364 Bad Found: 0
 Patients Selected: 364

Step 1 Prebilling:

Step 2 Alignment:
 Top Margin:
 Left Margin:

Step 3 Messages:
 Line 1:
 BILLING QUESTIONS? CALL 586-000-0000
 Line 2:
 MAKE CHECKS PAYABLE TO GENIUS SOLUTIONS
 Permanent:

Step 4 Prepare Statements:

| Account | Name | Bal | LastPayDt | LastPayAmt |
|---------|------------------|--------|------------|------------|
| 401500 | LEONARD GENIUS | 4.64 | 08/21/2014 | 4.64 |
| 401630 | DAVID GENIUS | 440.00 | 11/01/2016 | 50.00 |
| 402770 | JOHN GENIUS | 24.31 | 11/21/2014 | 24.31 |
| 414230 | DENNIS GENIUS | 30.00 | 11/01/2016 | 50.00 |
| 416140 | CLAUDE GENIUS | 44.37 | 09/29/2014 | 48.37 |
| 418550 | KENNETH GENIUS | 34.07 | 12/08/2014 | 70.51 |
| 418700 | STEVEN GENIUS | 7.64 | 11/26/2014 | 7.64 |
| 432630 | LAYMAN O GENIUS | 9.27 | 12/02/2014 | 9.70 |
| 443950 | KENNETH W GENIUS | 30.00 | 11/12/2014 | 30.00 |
| 454180 | HENRY E GENIUS | 3.01 | 08/06/2014 | 15.38 |
| 455980 | JACK GENIUS | 7.41 | 12/02/2014 | 10.00 |
| 460680 | LON GENIUS | 0.08 | 11/21/2014 | 45.00 |
| 461470 | VINCENT GENIUS | 413.61 | 01/05/2015 | 140.00 |
| 462610 | WILLIAM GENIUS | 80.00 | 11/12/2014 | 17.46 |
| 462960 | JAMES A GENIUS | 24.30 | 11/24/2014 | 11.49 |
| 463760 | JOHN E GENIUS | 25.00 | 12/08/2014 | 25.00 |
| 463930 | THOMAS GENIUS | 92.00 | 12/05/2014 | 46.00 |
| 465300 | MICHAEL J GENIUS | 67.54 | / / | 0.00 |

Some Patients have Unallocated Payments. Click the Neg Balance Button to view a list of these patients.

Send Files

Send Files also allows users to send electronic files such as electronic statements or Profit Recovery files to Genius Solutions. This feature can be used if a file was unable to be sent to Genius Solutions at the time it was prepared. From the Billing tab, click on Send Files from the left menu. Under File Type, select the type of file to be sent. Next to File, click the browse button to select a file to send. Click the Send button to send the file to Genius Solutions.

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Patient Code Files **Billing** Reports Appointments Route Slips Utility Help Messaging Special

Send Files

File Type:

File:

Billing
 Claims
 Statements
 Billing Validation
 Post Charges
 Post Ins Payment
 Post Pat Payment
 Other Claim Status
 Patient Contracts
 Stmt/Service Charge
 Capitated Checks
 Inquiry Claims
 AutoPost
 Insurance Checks
 Auto WriteOff
 AutoCharge
 Reprint Invoice
 Profit Recovery Pat
 Profit Recovery Ins
 Posting Validation
 AutoPost Exceptions
 Send Files