Utilizing the AutoCharge Module

GENIUS SOLUTIONS

HEALTHCARE MANAGEMENT SOLUTIONS

This manual is designed to introduce users to the AutoCharge functions in eTHOMAS. It should accompany the AutoCharge webinar video.

AutoCharge

AutoCharge Contents

AutoCharge Introduction

AutoCharge has been designed to work in conjunction with an EHR or other third party external program. Items to post are placed within AutoCharge through our GS Interface program. If you are interested in obtaining GS Interface for your office in order to send charges from your EHR, please contact Genius Solutions' Sales department at 586-751-9080.
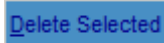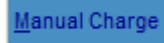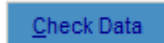
Once the charges have been loaded into eTHOMAS through GS Interface they can be posted using the AutoCharge method. eTHOMAS' flexibility gives users the option to post these items from the AutoCharge area, from the Post Charges under the Billing tab, Post Charges from within the Appointments, or directly from the Patient.

System Settings for AutoCharge

Before getting started, it is important to discuss System Settings that will affect the AutoCharge experience. Review the settings so that your office can make an informed decision on which setting(s) to activate.
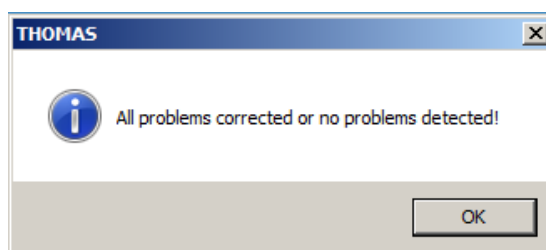
System Setting	What it does
PatAddDefHeader	If activated, when adding a patient will add a default Header code of OV. If using ImpAddDefHeader, it is not necessary to add PatAddDefHeader
ImpAddDefHeader	If activated, when importing charges, will add a default header code with information provided in ImportPost. 1=Illness/Injury; 2=Referring Physician; 3=Facility; 4=Prior Authorization; 5=Hospital Admit/Discharge Dates; 6=Use Hospital Admit Date as Consulted Date; 7=Use Referring Physician as Attending Physician; 8=Use Location as Facility; 9=Multiple Prior Authorization Numbers. A warning message will be displayed if some of this information is provided in the file but setting is not configured to use it. Adding a 0 to the value will suppress warning messages for all fields. **Value 3 will override 8**
DocAltID	If activated, will enable the Alternate ID within the Doctor Codes. This field is used to match the doctor codes from a third party vendor. **Used for specific vendors when a doctor code is not sent, but rather a TaxID or NPI. Consult Genius Solutions prior to activating this particular setting.**

ImportPostDiffdoc	There are three action types when manually charging for services that are loaded in ImportPost: Post, None, Delete. With this setting activated, it will make all the line items action as "Post" that have the same doctor code as the first line of service. The rest of the items it will make "None".
TranDrasClmDrImportPost	If activated, will default the Claim doctor to the Transaction doctor. Also, if activated, if a patient has more than one transaction being posted at a time with different doctors, the transactions will be split onto multiple claims.
HL7NotProcessPath	This is the path of the folder that holds the files that were not able to be imported into eTHOMAS. Example: \\server\thomas\medsys01\notprocessed\
ImportCase	This will change how cases work with Import Post. 0 = Do not use the case when auto charging. 1 = Use the case when auto charging. 2 = Use the imported data, and overwrite the existing case data with the imported data.
ImportNoExcCkPol	When running the AutoCharge Exception Report will suppress the message 'Import Policy X is not equal to existing Policy X'. To enable this setting, enter the value as 1, otherwise to disable setting, leave value blank.
ImportNote	This will change how Notes work with Import Post. 0 = Do nothing. 1 = Overwrite Note when Importing. 2 = Append Note when Importing.
Modifier4	This will add a 4th modifier into the posting charges screen, transaction edit screen, and import post. To enable this setting, enter the value as 1, otherwise to disable setting, leave value blank.
NoPatPayFromImportPost	Activate this setting to ignore any values found in the PAT_PAID field in the IMPORTPOST table when using the autocharge function in eThomas. These values are generally sent over in a HL7 file. To activate, enter the value as 1, otherwise to disable the setting, leave value blank.
PostSkipPatPay	Skip patient payment process after posting charges. To enable this setting, enter the value as 1, otherwise to disable setting, leave value blank.

TranDrAsClmDrImportPost	Activate this setting to default the Claim Doctor as the Transaction Doctor from the IMPORTPOST table when using the autocharge function in eThomas. These values are generally sent over in a HL7 file. To activate, enter the value as 1, otherwise to disable the setting, leave value blank.

How to Use AutoCharge for Charge Posting

eTHOMAS has the capability to bring in charges along with pertinent billing information from an EHR or other third party using our GS Interface program.

To access and view charges that have been imported, click the Billing Tab, and then click AutoCharge from the left side menu. Displayed will be a list of available imported procedures that are ready to be edited and/or posted.

Expand the screen to see all the fields on the AutoCharge screen. It is not necessary to view it this way.

Select All	Selects all of the Procedures within the AutoCharge screen. Select All may be used in conjunction with "Delete Selected" to delete all of the items or "Check Data" to check the data through an analysis.
Clear All	Unselects the selected items.

Delete Selected	Deletes the selected items from the AutoCharge list.
Order by	Select from the drop-down menu how to order the AutoCharge list.
R	Generates an on-screen report of the items displayed on the screen.
Manual Charge	Posts the charge for the item selected.
Check Data	Use the "Select All" along with the "Check Data". eTHOMAS will check for invalid data that does not exist in the Code Files section. Users may enter information within the Check Data Analysis.

Check Data

Use the Check Data button to analyze the items selected for missing or invalid information. If there are no errors, the user will receive a message:

If there are errors or problems, the user will be presented with an Auto Charge Analyze screen:

Located within the Type is the type of item that needs attention. In this case, a Location Code and Procedure Modifier that is invalid; meaning that they do not exist in eTHOMAS. To the right of the Type is the Code that is invalid. Use the Replace With to type in a valid code. Once you have replaced the invalid code, click the Apply Change button.

To add the invalid code to eTHOMAS, highlight the item and click Add. The system will open up the code file of the item that is invalid and add the data. Users can do this for all codes except for Location and Doctor codes since these are added as part of the licensing in eTHOMAS.

Add the necessary information to the code, save, and you will be brought back to the AutoCharge Analyze screen.

Editing an ImportPost Charge

You may edit individual Imported Procedure Transactions through AutoCharge or the individual patient when posting charges. Click on the Billing Tab; select AutoCharge from the left menu. Click the Edit button to edit the individual procedure. From the Imported Procedures edit screen the user may modify information contained within. The information displayed on this screen is used to prepare the claim in eTHOMAS. Any field that is not grayed out on the edit screen may be

changed, however, it is important that all code files coming in from your third-party software in which you will interface exist inside of the eTHOMAS code files prior to posting charges.

When charges are ready to be posted, select which transaction to post and click the Manual Charge button. Multiple items may be selected for a single patient. The **Imported Procedures** screen will come up with a list of available procedures for that patient.
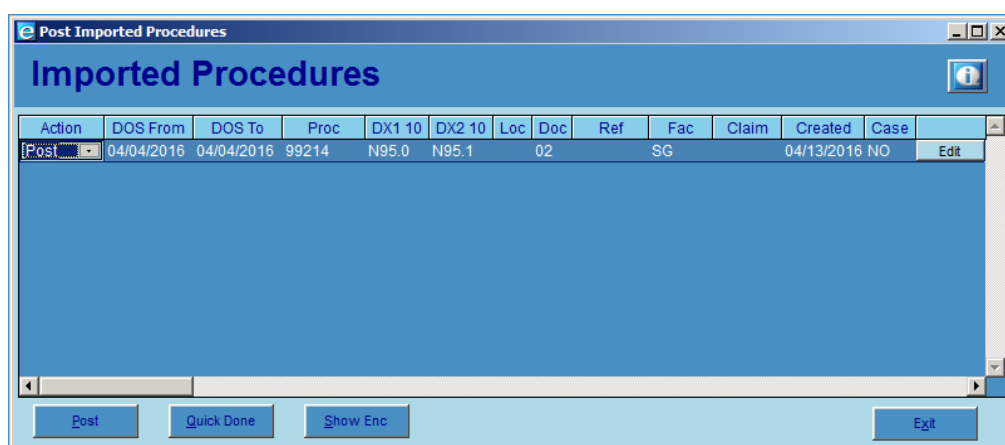
The user will have the ability to edit the procedure information from this screen. Notice the Action of each procedure is listed as Post, meaning you are ready to post charges against that procedure. The user has the option to change the action to either **None** or **Del** (delete). If the user is not ready to post charges then they may select the **NONE** option from the drop-

down menu. The **NONE** option will hold the charges which can be posted at a later time. If the user would like to delete a charge, then the **DEL** action may be selected. The **DEL** option will delete the selected charges. **Please keep in mind deleting the charge will delete the record from the imported procedure database file.** Any procedure with the **Post** action will be added into the claim when you click on the **Post** button.

The **Quick Done** button allows the user to skip the process of posting charges via the manual process. By using this button, the system will skip the process of bringing in the **Posting Charges** screen and will automatically generate the claim based off of the information from within the Imported Procedure.

Posting Charges using AutoCharge at the Patient Level

To post charges, go to the **Patient Tab/Post Charges** or the **Billing Tab** then **Post Charges**. As soon as you click **Post Charges**, the program will detect if there are any outstanding charges which exist inside of the ImportPost database file. If any exist, the **Imported Procedures** screen will come up with a list of available procedures.

The user will have the ability to edit the procedure information from this screen. Notice the Action of each procedure is listed as Post, meaning you are ready to post charges against that procedure. The user has the option to change the action to either **None** or **Del** (delete). If the user is not ready to post charges then they may select the **NONE** option from the drop-down menu. The **NONE** option will hold the charges which can be posted at a later time. If the user would like to delete a charge, then the **DEL** action may be selected. The **DEL** option will delete the selected charges. **Please keep in mind deleting the charge will delete the record from the imported procedure database file.** Any procedure with the **Post** action will be added into the claim when you click on the **Post** button.

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