United Medical, LLC Newsletter

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UMeNewsletter

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Best Practices for PDS Clients

The day before routine

1. Print schedule with insurance information
2. Check Insurance eligibility and benefits (make sure no referral/precert/auth is required for the visit) and check PCP name if you are PCP office
3. Print schedule with patient balances (go to reports, custom, customized office appointment schedule, select provider, and location, select date you want to print, click OK)
4. Confirm next day appointment
5. Pull Charts and prepare them for next day

Daily routine

Every Morning

1. Open your schedule
2. Have your schedule with patient balances at check in window, so you can collect any outstanding balances that may be owed

When the patient comes in (from the appointment schedule)

1. Right click on patient name
2. Scroll down to patient information
3. Make sure the patient’s information is correct *make sure you check the insurance cards*
4. Make sure you check the alerts on the patient account (ex: mail returns, cob info, update insurance info, incorrect PCP, ECT….)
5. Make sure you hit OK to save any changes you have made
6. Right click on patient name again and scroll down to print and click on routing slip
7. If patient paid a co pay, go to the check out window, highlight **patient’s name** and hit co pay and post the co pay
8. If patient paid on account post that money in the patient payment window (9^{th} icon from the left)
9. Check if patient has an alert for Collections. Check the visits with collection, Pre collection financial class and collect from the patient at the window.

When the patient is checking out

1. Schedule follow up appointment (if necessary)
2. Put the all charges and diagnosis in the Check out window (make sure you highlight the **patient’s name**)

Every night:

1. Mark any patients that did not show up as No Shows (right click on patient’s name check box in middle of screen)
2. Make sure that all charges are in for the day
3. Print the payment register (go to reports, daily, payment register, enter pt operator id that was posting the co pays, leave location blank, hit OK) (This is optional)
4. File charts from day away

To Add/Update an Insurance Carrier or Referring Doctor

1. Open internet explorer
2. In the address bar type: www.umusa.net
3. Click office forms
4. Select the appropriate form

   Request for a referral doctor

   Insurance Request Form

5. Fill out all the required fields
6. Click Submit