United Medical, LLC Newsletter

AUGUST 2010

UMeNewsletter

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Best Practices for SPM Clients

The day before routine

1. Print Schedule include patient balances - Reports – Scheduler – Scheduler Report
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. Check patient balances, note the chart to communicate the balance with patient.
4. Print superbills for next day
5. Confirm next day appointment
6. Pull Charts and prepare them for next day

Daily routine

Every Morning

1. Open your schedule

When the patient comes in (from the appointment schedule)

1. Right click on patient's name and click patient activities and check all information *and check insurance info
2. Make sure if there is an alert on the account, you update the information that is requested (ex. Mail returns, incorrect pcp, update cob information, ETC…)
3. Then right click on patient and click check in (*make sure insurance information is updated before you check the patient in)
4. If using prompt pay post co pay (you will need to open a payment batch when first payment is posted for the day)

When the patient is checking out

1. Schedule follow up appointment (if necessary)
2. Put the all charges and diagnosis in the Patient monitor window (make sure you highlight the **patient's name**)
3. If not using prompt pay, go to payment wizard and post all payments

   - **At the end of the day your Patient Monitor Screen should be empty ***

Every night:

1. Print daily reports and check for any discrepancies
2. Print your deposit slip (optional)
3. Print your day sheet (optional)
4. Close all batches

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

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