

Family Accounting

Including:

- Adding a Family Member
- Linking Insurance Plan to New Family Member
- Adding New Insurance Plan for New Family Member
- Separating a Patient from a Family Account
- Merging Accounts
- Using/Searching for Family Account #'s

- Family accounting can only have one responsible party for all listed members.
- Patient number (00, 01, etc.) is assigned by order in which patients are registered.
- The responsible party on patient 00 will carry over as the responsible party on added family members (01, 02, etc.).
- Family members may have different insurances.
- Bills generated will be sent care of responsible party for all persons on family account.
- If a patient who is a minor has a different responsible party than the rest of the family, do not put them on the Family Account.

Adding a Family Member

Create a new account if family is new to practice or search for previously established family member. Click **Add Family Member**.

The screenshot shows a medical software interface with a menu bar at the top: File, Reports, Patient Billing, Insurance Processing, Patient Activity, Appointments, Clinical, Documents, Communications, Tables, Tools. The main window is titled 'PatientActivity' and shows 'Account: 10154' and 'Patient: Dan Test'. Below this are several tabs: Cover Page, Patient Info, Responsible Party, Insurance Plans, Account Ledger, and Documents. The 'Patient Info' tab is active, displaying fields for First Name (Dan), Last Name (Test), Address (1 Main St), City (Spencerport), State (NY), Zip Code (14559), Home Phone, and Work Phone. To the right, 'Age: 47', 'Sex: M', 'Date of Birth: 01/02/70', 'Chart #', 'Last Visit: / /', and 'Next Visit:' are shown. A 'Family Members' table is visible, listing Dan (00, 47), Julie (01, S, 45), and David (02, C, 12d). A red box highlights the 'Add Family Member' button. To the right of the family members table is the 'Responsible Party' section, which includes fields for First Name (Dan), Last Name (Test), Home Phone, Work Phone, Relation (Self), Billing Status (Regular), Pat Balance (0.00), and Ins Balance (0.00). At the bottom left, there is a table for insurance plans:

Plan	Insured Party	ID
Blue Choice	Dan Test	YND200123456
Medicaid	David Test	FG14589P
Blue Choice Optio	Dan Test	12345602010

At the bottom right, there is a 'Patient Notes' section with a scrollable area.

Patient Info tab will open. Some information will prefill. *Enter what your practice normally captures for new patient registration such as birth date, gender, etc.* Change **Relation** field in dropdown box. This is relationship patient has to responsible party. Save.

The screenshot shows the 'PatientActivity' window with the 'Patient Info' tab selected. The 'Account' field contains '10154' and the 'Patient' name is 'Test'. The 'Patient Data' section includes fields for First Name, Last Name (Test), Address (1 Main St), City (Spencerport), State (NY), and Zip (14559). The 'Relation' dropdown menu is set to 'Child' and is highlighted with a red box. The 'Save' button at the bottom is also highlighted with a red circle.

Clicking Save, will open the **Insurance ID** window. If new family member has been **assigned a suffix on the insurance card**, enter it here under the correct plan and save. Otherwise by pass by clicking cancel.

The 'Insurance ID's' dialog box contains a table with two columns: 'Plan' and 'ID (or Suffix)'. The plans listed are Blue Choice, Medicaid, Blue Choice Option, and MVP OPTION. There are 'Save' and 'Cancel' buttons at the bottom.

Plan	ID (or Suffix)
Blue Choice	
Medicaid	
Blue Choice Option	
MVP OPTION	

Linking Account Insurance Plan to New Family Member

From Patient Activity Screen, search for correct family member. Click on **Insurance Plans** tab.

The screenshot shows the Patient Activity screen for patient Danielle Test (Account: 10154). The 'Insurance Plans' tab is selected. The 'Patient Info' section shows Danielle Test, 18 months old, born 12/26/15, living at 1 Main St, Spencerport, NY 14559. The 'Family Members' table lists Julie (01 S 45), David (02 C 18d), and Danielle (04 C 18m). The 'Responsible Party' section shows Dan Test, Self, Regular Billing Status, with 0.00 balance.

Family Members			
Julie	01	S	45
David	02	C	18d
Danielle	04	C	18m

Insurance plan the new family member is covered under may already be on family account. If so, choose correct one from the tabular list.

Make sure Insured Party info is correct. Update **Relation** dropdown box to reflect the subscribers' (insured party) relation to the the patient. In this example, Dan is father of new family member, Danielle.

The screenshot shows the 'Insurance Plans' tab selected. The 'Blue Choice' sub-tab is active. The plan is 'BC' for 'Dan' (Insured), 'Primary' order, ID 'YND200123456', 'Assigned'. The 'Insured Party Data' section shows Dan Test, Male, Relation 'Father', Birth Date 01/02/1970. The 'Plan Info' section shows 'Plan is for selected family members' checked.

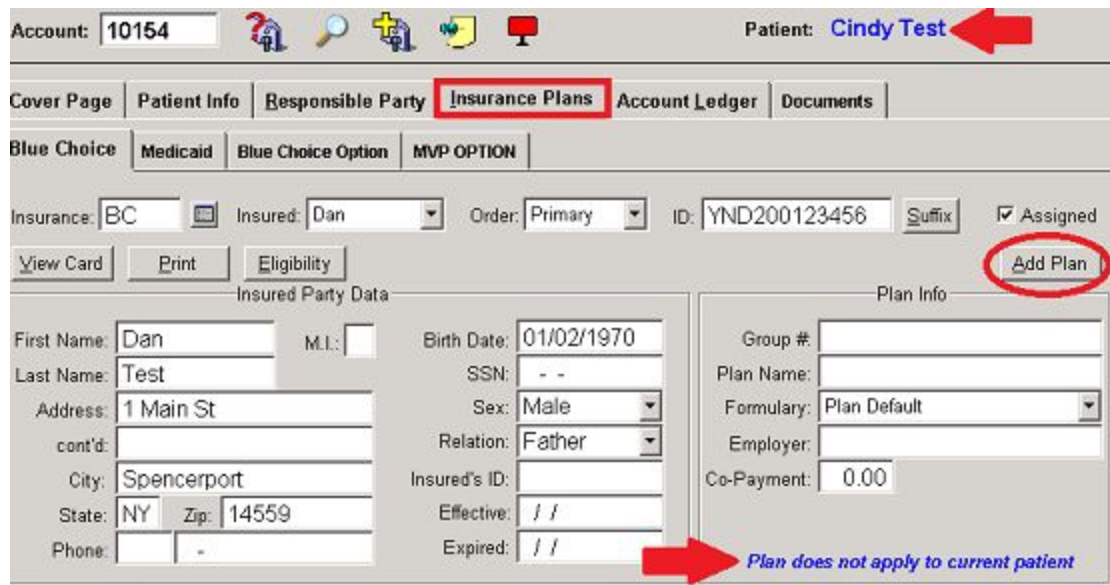
Insured Party Data		Plan Info	
First Name: Dan	M.I.: []	Group #: []	Plan Name: []
Last Name: Test	Birth Date: 01/02/1970	Formulary: Plan Default	Employer: []
Address: 1 Main St	SSN: - -	Co-Payment: 0.00	
City: Spencerport	Sex: Male		
State: NY Zip: 14559	Relation: Father		
Phone: []	Insured's ID: []		
	Effective: / /		
	Expired: / /		

Checking “Plan is for selected family members” in the bottom right corner will bring up **Select Family Members** window. Choose family members covered under plan, (in this example, Blue Choice) and click OK.



Adding New Insurance Plan for New Family Member

From Insurance Plans screen, click on **Add Plan**.



In this example, we have added New Family Member, Cindy Test who has CHP. BC plan will prefill but message in bottom right will show “Plan does not apply to current patient” so click Add Plan.

Select Insurance window will open. Type in description of plan and click on correct one or choose create to enter a new plan.

Select Insurance

Description: CH

Child Health Plus
Choice Benefits

Create Cancel

In this case, by clicking on Child Health Plus, CHP will appear as insurance for new family member, Cindy. Fill in all Insured Party Data including choosing **Insured** from dropdown box as well as choosing **Order** and entering **Insurance ID #**. Make sure **Relation** box is updated. Enter **Effective** date of insurance from card. If new family member is the only one covered on this insurance, click "Plan is for this family member only". Save.

PatientActivity

Account: 10154 Patient: Cindy Test

Cover Page Patient Info Responsible Party Insurance Plans Account Ledger Documents

Blue Choice Medicaid Blue Choice Option MVP OPTION New Plan

Insurance: CHP Insured: Cindy Order: Primary ID: VYT200020001 Suffix Assigned

View Card Print Eligibility Add Plan

Insured Party Data

First Name: Cindy M.I.: Birth Date: 03/08/2012
Last Name: Test SSN: - -
Address: 1 Main St Sex: Female
cont'd: Relation: Self
City: Spencerport Insured's ID:
State: NY Zip: 14559 Effective: 05/01/2016
Phone: 585 123-4567 Expired: / /

Plan Info

Group #: Plan Name:
Formulary: Plan Default
Employer:
Co-Payment: 0.00
 Plan is for this family member only
 Plan is for selected family members

Save Cancel Delete Plan

Separating a Patient from a Family Account

Identify account # and **suffix** of family member that needs to have their own account.

Account: 10154 Patient: Bobby Test

Cover Page | Patient Info | Responsible Party | Insurance Plans | Account Ledger | Documents

Patient Info: First Name: Bobby, Last Name: Test, Address: 1 Main St, City: Spencerport, State: NY, Zip Code: 14559, Age: 20, Date of Birth: 09/06/96, Sex: M, Prv: 1

Family Members:

Danielle	04	C	18m
Cindy	05	C	5
Bobby	06	C	20

Responsible Party: First Name: Dan, Last Name: Test, Relation: Self, Billing Status: Regular, Pat Balance: 0.00, Ins Balance: 0.00

Choose Tools, Account Utilities, **Separate Dependent**.

File | Reports | Patient Billing | Insurance Processing | Patient Activity | Appointments | Clinical | Documents | Communications | Tables | **Tools**

Tools menu items: System Utilities, Billing Utilities, **Account Utilities**, Interfaces, EMR Set-Up, Other, Meaningful Use Analyzer

Account Utilities sub-menu items: Account Reconciliation, Account Verification Report, **Separate Dependent**, Join Patient To Family, Change Account Numbers, Combine Accounts, Inactivate Old Patients

Enter Account # with Suffix which will bring up patient's name. Warning: Once patient account is moved, it cannot be rejoined to Family Account.

Click OK.

Separate Dependent

Account: 10154-06

Bobby Test

This utility will separate a dependent from its family and move it to a unique account number. All of the patient's history will be moved to this new account. Once it is moved, it cannot be moved back.

OK Cancel

A search for Separated Patient will now bring up the new account number and list him as the responsible party.

The screenshot shows a software interface for patient records. At the top, the 'Account' field contains the number '12765', which is circled in red. To the right, the patient's name is listed as 'Bobby Test'. Below this is a navigation bar with tabs for 'Cover Page', 'Patient Info', 'Responsible Party', 'Insurance Plans', 'Account Ledger', and 'Documents'. The 'Responsible Party' tab is selected and circled in red. The main area displays patient information for Bobby Test, including his first and last name, address (1 Main St), age (20), date of birth (09/06/96), sex (M), and primary status (1). There are also fields for chart number, last visit, and next visit.

Joining a Patient to an Account

Find account #'s of joining patient and of family account. Joining patient's account will no longer be available after joining family account.

From toolbar choose Tools, Account Utilities, **Join Patient to Family**.

Enter joining patient account # in **Current Account** field. Enter family account # in **Family to Join** field.

*Please note warning!

OK

The 'Join Patient To Family' dialog box is shown. It has two input fields: 'Current Account' with the value '12512' and 'Family to Join' with the value '10154'. Next to each field is the name of the patient: 'Mike Test' and 'Cindy Test' respectively. Below the fields is a warning message: 'This utility will move an existing patient to a dependent of another family account. All of the patient's history will be moved to this new account. Once it is moved, it cannot be moved back.' At the bottom, there are 'OK' and 'Cancel' buttons, with the 'OK' button circled in red.

The 'Join Family' dialog box is shown. It contains a single line of text: 'Patient moved to new family'. At the bottom, there is an 'OK' button.

Merging Accounts

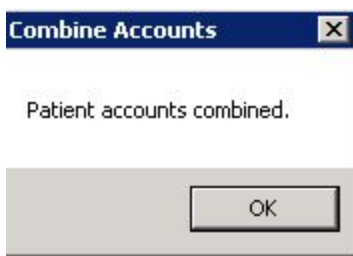
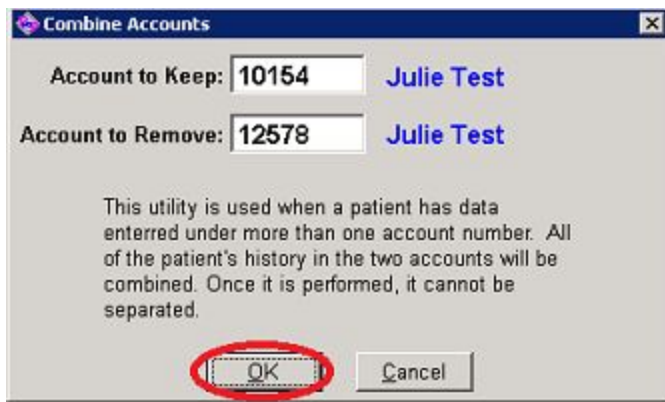
Information on the two individual accounts to be merged must match. Name, birthdate and SS# must match exactly. One account can not have a SS# when the other one does.

From toolbar choose Tools, Account Utilities, **Combine Accounts**.

Enter account information in corresponding fields.

Please note warning!

OK.



Using/Searching for Family Account #'s

To open the correct family member's chart on both the clinical side and patient activity side, the **family account # plus the suffix** must be used. **If only the account # is used, patient 00 will open.**

The screenshot shows a software interface with a menu bar (File, Reports, Billing, Patients, Appointments, Clinical) and a sub-menu (PatientActivity, Clinical). Below the menu is a grid of icons for Profile, WCC, ROS, General, Derm, Dx, CPT, Labs, Imaging, Referral, and Instruct. A search box is visible with the text "Account: 10154-04" and a magnifying glass icon. Below the search box are fields for "DOB:", "Age:", "Sex:", "Last Visit:", and "Next Visit:". At the bottom, there are buttons for "Schedule", "Inbox 5", "TOC", and "Visit".

In the example above, entering Account #10154-04 brings up Danielle Test's chart.

The screenshot shows the same software interface as above, but now displaying the patient chart for Danielle Test. The search box shows "Account: 10154" and "Danielle Test" is highlighted in blue. Below the search box are fields for "DOB: 12/26/15", "Age: 10m", and "Sex: F". Below these fields are "Last Visit:" and "Next Visit:" fields. At the bottom, there are buttons for "Schedule", "Inbox 5", "TOC", and "Visit".

Entering only #10154 with no suffix would bring up Dan Test's chart.

File Reports Billing Patients Appointments Clinical D

PatientActivity **Clinical**

Profile vVCC ROS General Derr

Dx CPT Labs Imaging Referral Instruct

Account: 10154

Dan Test

DOB: 01/02/70 Age: 47 Sex: M

Last Visit: Next Visit:

Blue Choice

* No Pharmacy On File *

Schedule | **Inbox 5** | **TOC** | Visit

The same applies on the **Patient Activity** side. You must enter **Family account # with suffix** to bring up correct patient. You may also still **search by first and last name** of patient or bring up Family Account and search for correct patient in **Family Members** section. Click on correct patient to bring up their information.

File Reports Billing Patients Appointments Clinical Documents Communications Tables Tools

Patient Activity

Account: **10154** Patient: **David Test**

Cover Page | Patient Info | Responsible Party | Insurance Plans | Account Ledger | Documents

Patient Info			Age: 23d Sex: M		Responsible Party		
First Name:	David		Date of Birth:	06/18/17	First Name:	Dan	
Last Name:	Test		Chart #:		Last Name:	Test	
Address:	1 Main St		Last Visit:	11	Home Phone:		
cont'd:			Next Visit:		Work Phone:		
City:	Spencerport		Family Members			Relation:	Self
State:	NY	Zip Code:	David 02 C 23d		Billing Status:	Regular	
Home Phone:			Add Family Member		Pat Balance:	0.00	
Work Phone:							
Plan			Insured Party		ID		
Child Health Plus			Cindy Test		VYT200020001		
Medicaid			David Test		FG14589P		
Blue Choice			Dan Test		YND200123456		

Patient Notes