Medical Clinic Workflow

Annotated Table of Contents

Overview: *Medical Clinic Workflow*

The book is organized into three parts:

1. The first part contains chapters for the front desk involving adding patients, attaching payers to a patient, scheduling appointments, and patient registration.
2. The second part consists of chapters for the clinical staff involving nursing intake, provider initial contact, open orders, provider documentation, nursing discharge, front desk payment capture, and pending results processing.
3. The third part consists of chapters for the billing staff involving posting charges, printing bills, reimbursement processing, accounts receivable, and collection activity.

Chapter 1 - Medical Clinic Workflow

This chapter provides an overview of clinical workflow systems including workflow efficiencies, clinical workflow steps, major categories of clinical workflow, and rules-based methodology used in MedTrak.

Chapter 2 - Logging in to MedTrak

This chapter introduces MedTrak and how to locate the MedTrak web site. The user then accesses the system using his assigned customer login user name and password. To enter the assigned location, the user enters his employee initials and password. The importance of password protection is emphasized with the user taught how to change and control his own password.

Part 1: Front desk

Chapter 3 - Adding Patients

In this chapter, the user learns how to add new patients to the MedTrak database. The initial process uses the social security number to distinguish between patients. The user is taught to use all 9's for the social security number, if the patient does not provide a social security number.

Chapter 4 - Helpful Tips and Navigation

In this chapter, the user utilizes the MedTrak User Guide located on the Main Menu. The user learns about the common screen elements, basic navigation for selecting items and entering commands, the use of selection boxes, expanded answers using the keyboard and voice recognition, picking items from a category list, basic searching, helpful tips, and frequently asked questions.

Chapter 5 - Attaching Payers to a Patient

In this chapter, the user learns about the different classes of healthcare payers and how to attach a payer to the patient. The user also learns about attaching multiple payers (up to four) and adding the subscriber information from the patient's insurance card.

screen for the provider to select if needed. After placing orders for the patient, the provider reviews the Clinic Status screen to see which patient they will attend to next.

Chapter 16 - Physician – History and Exam

In this chapter, the user learns how to document the provider's findings during the history and exam portion of the patient encounter. MedTrak allows three ways for the provider to document his findings:

- By **Dictation Topic** - for providers who dictate their history and exam using dictation or voice recognition
- By **Detailed Questions** - for providers who like to use the keyboard to type their answers
- By **Check Boxes** - for providers who take a touch-screen tablet into the examination room with them

Chapter 17 - Physician - Prescribing

In this chapter, the user learns how to place orders for both dispensed and prescription medications. MedTrak automatically loads the provider's normal quantity and directions for the medications. The user can also use the "order code" method for ordering a medication.

Chapter 18 - Physician - Aftercare Instructions

In this chapter, the user learns to place aftercare instructions for the patient. The patient uses these instructions as a guide to his self-care between appointments, and for work restrictions for worker's compensation. The user learns to utilize check boxes and the expanded instruction processor. The aftercare instructions are broken down into the following categories:

- Important points to remember
- What to be concerned about
- Medications
- Work status
- Work restrictions
- Follow-up
- Assessment and plan of care
- Summation
- Case Closed

Chapter 19 - Physician – Evaluation and Management

In this chapter, the user learns to select the level of service (evaluation and management) code. MedTrak uses the history, exam, and decision-making options for this chapter. The user learns to select the code using the appropriate level of service and by just entering the CPT code.

Chapter 20 - Nursing - Discharge

In this chapter, the user learns how to finish any existing open orders. After reviewing with the patient his aftercare instructions, medications, and any other paperwork, the user discharges the patient from the Clinic Status screen. If it is a patient responsibility visit, the user will review the charges for the visit with the patient before sending him to the front desk. If it is an occupational medicine visit (employer pays the bill), the patient is discharged from the clinic directly from the room.

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Chapter 21 - Front Desk – Payment Collection

In this chapter, the user learns how to finish processing patient responsibility patients that are sent to the front desk at the completion of the visit, for a variety of payment situations:

- It is a self pay patient who owes for all of the charges on the visit
- The patient owes a co-payment amount
- The patient owes a co-insurance amount
- The patient owes both a co-payment and co-insurance amount
- The patient does not owe anything (insurance covers the total charges for the visit)
- The visit is within the global billing period and there are no charges

Chapter 22 - Pending - Results

In this chapter, the user learns how to process incomplete visits where the results are pending for x-rays, laboratory tests, or treatments and opinions from referrals to specialists.

Part 3: Billing and Reimbursement

Chapter 23 - Unbilled Charges

The user learns in this chapter to process the unbilled charges for the patient encounters. This dashboard breaks down the visits by those that need additional information before posting and those that are ready for posting. Additional information is needed for visits that still need authorization from the payer or employer. The demographics log needs review to be sure that the demographic changes were correct. Or, the provider needs to complete the history and exam portion of the patient's documentation for the visit. Once ready for posting, the user will learn how to review the unposted charges for validity, assign the correct diagnoses numbers to the line items, and post the charges to create an invoice.

Chapter 24 - Posting Charges

In this chapter, the user learns how to post charges to create an invoice. Charges available for posting to an invoice are broken down by financial class to make it easier for the billing editor to work one financial class at a time.

Chapter 25 - Printing Bills

In this chapter, the user learns how to use the Bills to Be Processed screen. This screen breaks down the bills by type of payer and type of transmission. Some bills will be printed and mailed and others will be electronically transmitted to a clearinghouse. The user will locate the invoice that he created in the previous chapter and print it as part of the work product.

Chapter 26 - Payment Processing

In this chapter, the user learns how a clinic receives payments for its services. Some payments are collected at the front desk at the time of service, and some payments arrive in the mail from patients, insurance companies, employers, and other payers. Users will learn to create a payment batch and add payments into the batch. They will also learn to post the payment(s) and any adjustments to the line items of the invoice that they created in a previous chapter.