

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.

Medical Clinic Workflow

Annotated Table of Contents

Chapter 6 - Scheduling

In this chapter, the user learns about the multiple tiers of the Scheduler – location, division, and staff. The user learns to navigate to the proper day to set up the appointment, and the importance of blocking out time periods where the provider is not available for scheduled appointments. The user schedules both established patients and new patients for both patient responsibility and occupational medicine visits. For patient responsibility visits, the user applies his knowledge of attaching payers to a patient. For occupational medicine visits, the user learns to record the authorizing person from the employer, any special notes about the visit, and whether the employer wants to be called before the provider sees the patient.

Part 2: Clinical Workflow

Chapter 7 - Patient Registration

The user learns in this chapter that there are two ways to register a patient in MedTrak (from the Scheduler, through Patient Registration) depending on whether the patient has a scheduled visit or not. For new patients, the user learns to record all of the patient's demographic information (just like adding a patient). For existing patients, the user learns to review the demographics with the patient for accuracy. Also, for new patients, the user will create a new case. For Patient Responsibility patients, the user will attach the appropriate payers. Each visit requires a new visit record to identify the type of visit – doctor, order only, orthopedic, rehab services, chiropractic, etc. Since MedTrak is a problem-focussed system, the user then learns to select the presenting problem(s) for injuries and illnesses.

Chapter 8 - Clinic Status Screen

In this chapter, the user learns how to read and understand each feature on the Clinic Status screen.

Chapter 9 - Nursing Intake

In this chapter, the user learns to use the Clinic Status screen. When the user decides which room the patient will use, they will move them on the Clinic Status screen. After putting the patient in a room, the first step in processing the patient is for the nurse to answer the preliminary patient history questions and document the patient's vital signs. The user learns about the various types of questions including questions with normal answers, stored responses, and expanded answers. Once the nurse finishes with initial patient intake, he learns to pass the baton (put the chart in the rack) to the provider.

Chapter 10 - Provider – Initial Contact

In this chapter, the user learns how the providers use the Clinic Status screen. The providers use the Clinic Status screen to control the flow of patient care by constantly reviewing what patients are in the clinic, why they are in the clinic, and who has been waiting the longest for the next step in processing. To note to the other caregivers in the clinic location that the provider is now seeing a patient, the provider enters his initials next to the patient to indicate that he picked up the patient's chart. After examining the patient, the provider places his own orders for the patient's diagnostics or treatments in MedTrak using the CPOE processor. Because MedTrak is problem-focussed, the most likely orders for the presenting problem(s) will appear on the first CPOE

Medical Clinic Workflow

Annotated Table of Contents

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 11 - Open Orders Processing

In this chapter, the user reviews the Clinic Status screen to see what open orders exist for the patient. Patients are designated as having open orders with the “<>” symbol next to their names. Once the user finishes processing the open orders (performed the lab test, x-rayed the patient, etc.), he enters the results of the testing or data about completing the open order into the Open Orders processor.

Chapter 12 - Physician – Out the Door - Overview

MedTrak has its roots in the emergency department of the hospital. As such, one of the terms the providers frequently used when addressing the ward clerk was, “I am done with this patient. I want them out the door.” So MedTrak developed an Out the Door process for the provider’s use. This chapter is only for informational purposes for the user to learn and understand the steps that the provider goes through using the Visit Documentation screen to finish up with a patient. This chapter describes how the provider:

- places any additional orders
- refers the patient to a specialist or to have a test not performed at this location
- diagnoses the patient
- documents the patient’s history and exam
- orders medications for the patient
- provides aftercare instructions to the patient
- determines the level of service provided for the patient

Chapter 13 - Physician – Additional Orders

In this chapter, the user learns how to place additional orders for the patient’s care. The user learns a new way to place an order with a user defined “order code”. The user also learns to use the Procedure processor to document the complexity of a given procedure to drive additional charges to the bill.

Chapter 14 - Physician – Referrals

In this chapter, the user learns how to place an order for a referral to a specialist for further evaluation and/or treatment. The referral could be to a specialist, for treatment, or for a scheduled test.

Chapter 15 - Physician – Diagnosing

In this chapter, the user learns how to use the diagnoses processors to select the diagnoses for the patient. Because MedTrak is problem-focussed, the physician can use the diagnoses tree based on the presenting problem to select the diagnoses. MedTrak also provides the physician six other ways to find the diagnoses.

Medical Clinic Workflow

Annotated Table of Contents

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.

Medical Clinic Workflow

Annotated Table of Contents

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.

Medical Clinic Workflow

Annotated Table of Contents

Chapter 27 - Accounts Receivable Aging

In this chapter, the user learns how to use the real-time Accounts Receivable Aging dashboard. The dashboard is broken down into two main sections – Debit A/R and Credit A/R. The users will learn to navigate the dashboard using the activity and follow-up filters and aging periods at the top of the screen.

Chapter 28 - Collection Activity

In this chapter, the user learns how to record collection activities in MedTrak. The user records follow-up notes, set reminders for further contact with the payer, and attach foreign documents (EOB's, denial letters, etc.) to the chart. The user will also learn to use the Reminder processor to continue to pursue collection activity.