Weekly 'To-Do' List

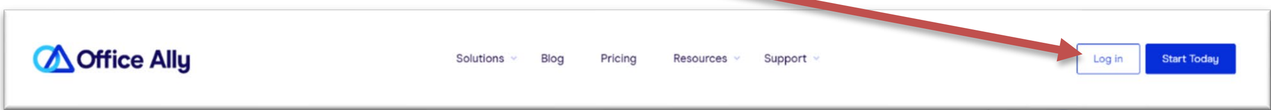
(Estimate: 20 Minutes = Videos 7-min + 10-minute Read)
Best Practices for billing charges and managing correspondence in Office Ally-Practice Mate.

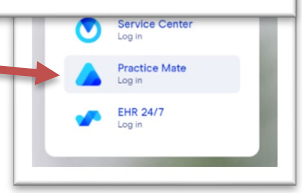
Username: ______________________________
(email address)

Password: ______________________________

Browser Troubleshooting. Try the following steps before calling support to save time.

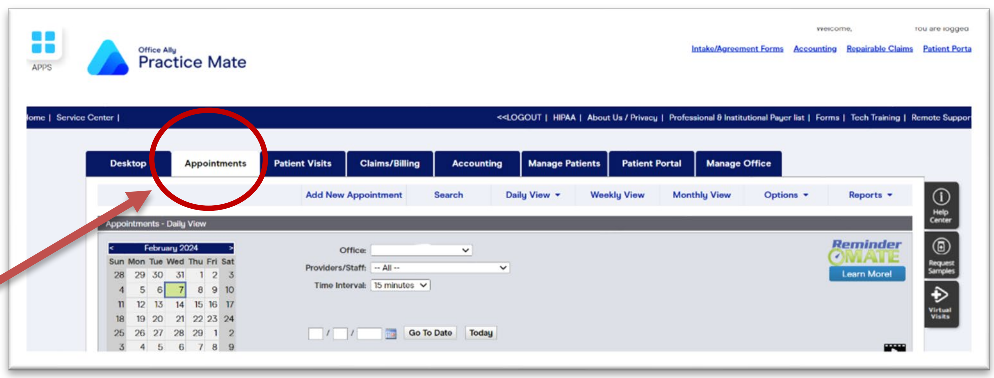
1. Try using Google Chrome.
2. Reset and clear your browser cache and cookies.
3. Make sure pop-ups are not blocked by your browser.





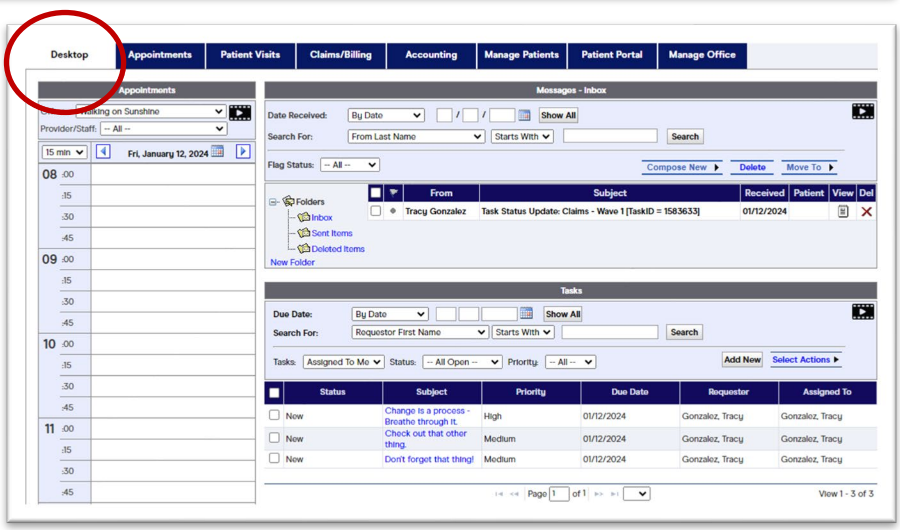
Login to Office Ally – Practice Mate

1. Go to the Office Ally login page for Practice Mate: https://cms.officeally.com/practicemate
2. Select [**Practice Mate Login**] from the drop-down menu.
   If you are directed to the SERVICE CENTER, close your browser window, and try logging in again.



3. Your account will open to your "**Appointments**" tab.

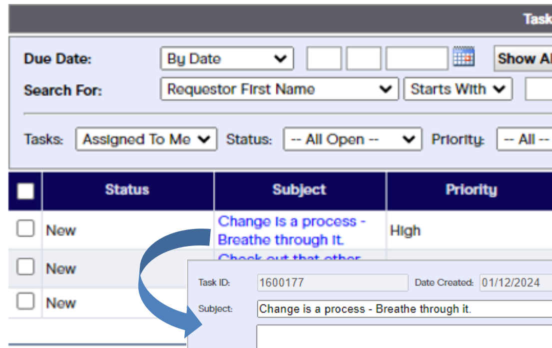
(Note: recording and keeping your appointments in Office Ally is optional.)

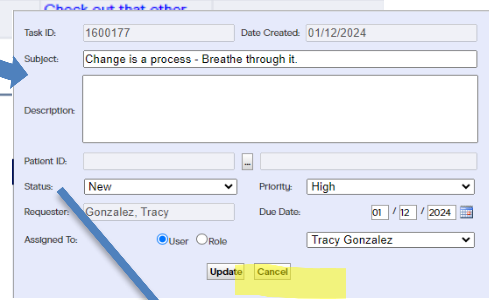


Desktop Tab

Click the blue "Desktop" tab when you login to see any new messages, announcements, or other items that need attention.

1. **Messages – Inbox**
   a. Watch the training video
   b. (Runtime 2:29)

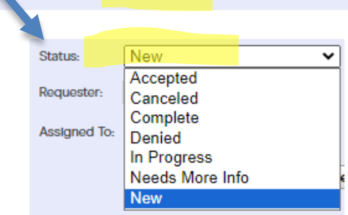




2. Check out your **Messages – Inbox**. Messages in your inbox may also communicate information or changes to a task or project.

3. **Task List.** Tasks created for you by the billing office may communicate missing information, instructions, or other tasks that need attention.

   a. Watch the training video (Runtime 2:07)



   b. **Status.** When you have addressed a task, don't forget to change the task status to the appropriate status and click [Update].

   c. **'COMPLETE'.** If you complete a task assigned to you in your 'Tasks' list, change the status to 'COMPLETE' and click [Update]. This is very important, because it triggers us to go back and review the account or charge so that we can continue processing it. Without marking 'COMPLETE', the item may sit unnoticed, until monthly or quarterly reporting identifies it.

   d. **'NEEDS MORE INFO'**. If you cannot complete the task because additional information or correspondence is needed **from Professional Practice**, then add notes to the description to explain what is needed, change the status to 'NEEDS MORE INFO', and click [Update]. This action will send the task back to us to address the issue that you described. ***If information is needed from someone <u>other than</u> Professional Practice, use 'IN PROCESS' instead*** …

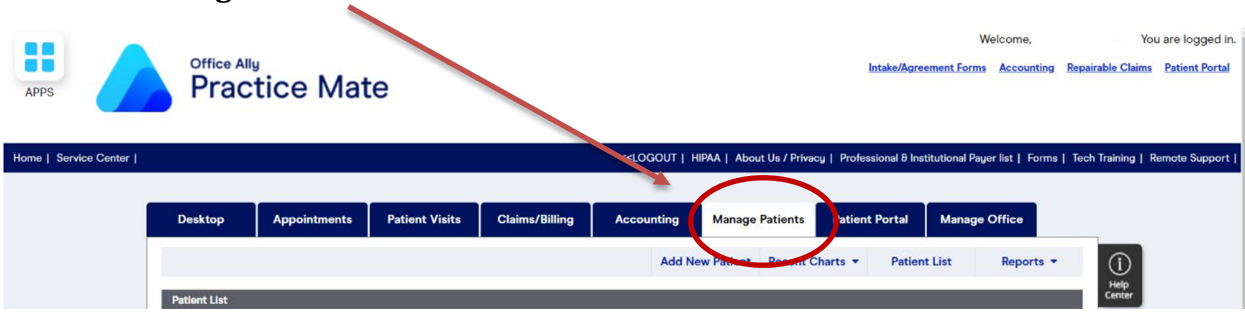
   e. **'IN PROCESS'**. If you review the task, but you need additional time to address it or to gather information, you can change the status to '**IN PROCESS'** and click [Update]. This will let us know that you received the message, and you're working on it. It will also keep us from sending you unnecessary, nagging messages.

Create Visits – Manage Patients Tab

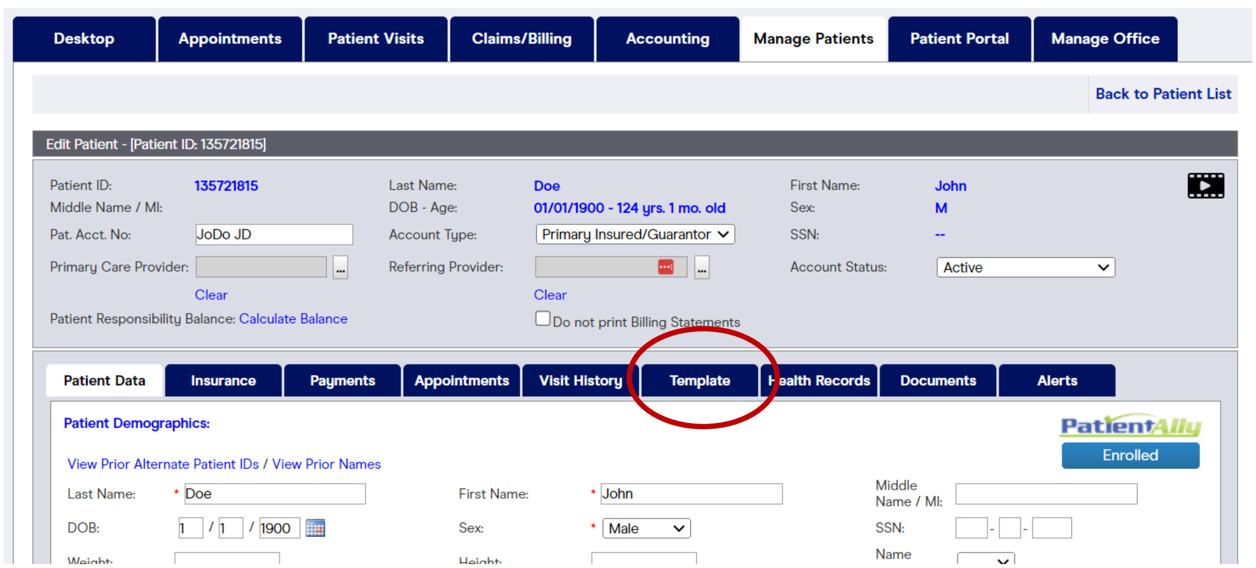
After you check your 'Desktop', go to the 'Manage Patients' tab to create new patient visits.

1. Watch the training video (Runtime 2:55)

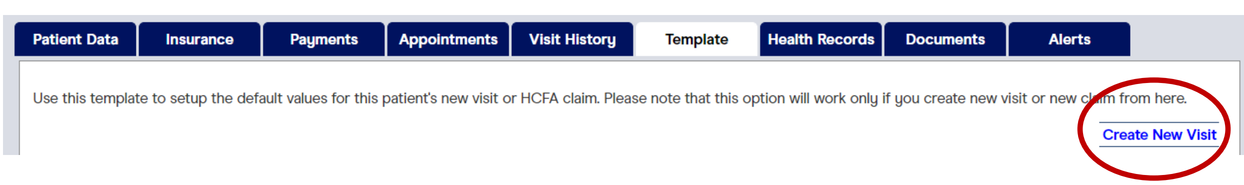
2. Click the '**Manage Patients**' tab in Practice Mate.



3. **Patient Record.** Select the patient that you would like to create a visit for.
4. **Template.** When the patient's record opens, select the '**Template'** tab on the lower row of tabs.

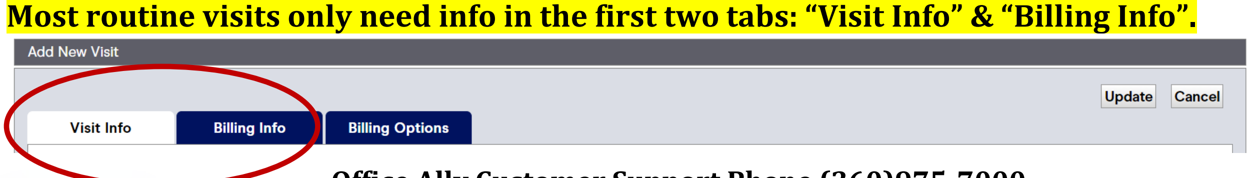


5. Click the blue link: "**Create New Visit**" in the patient's template.

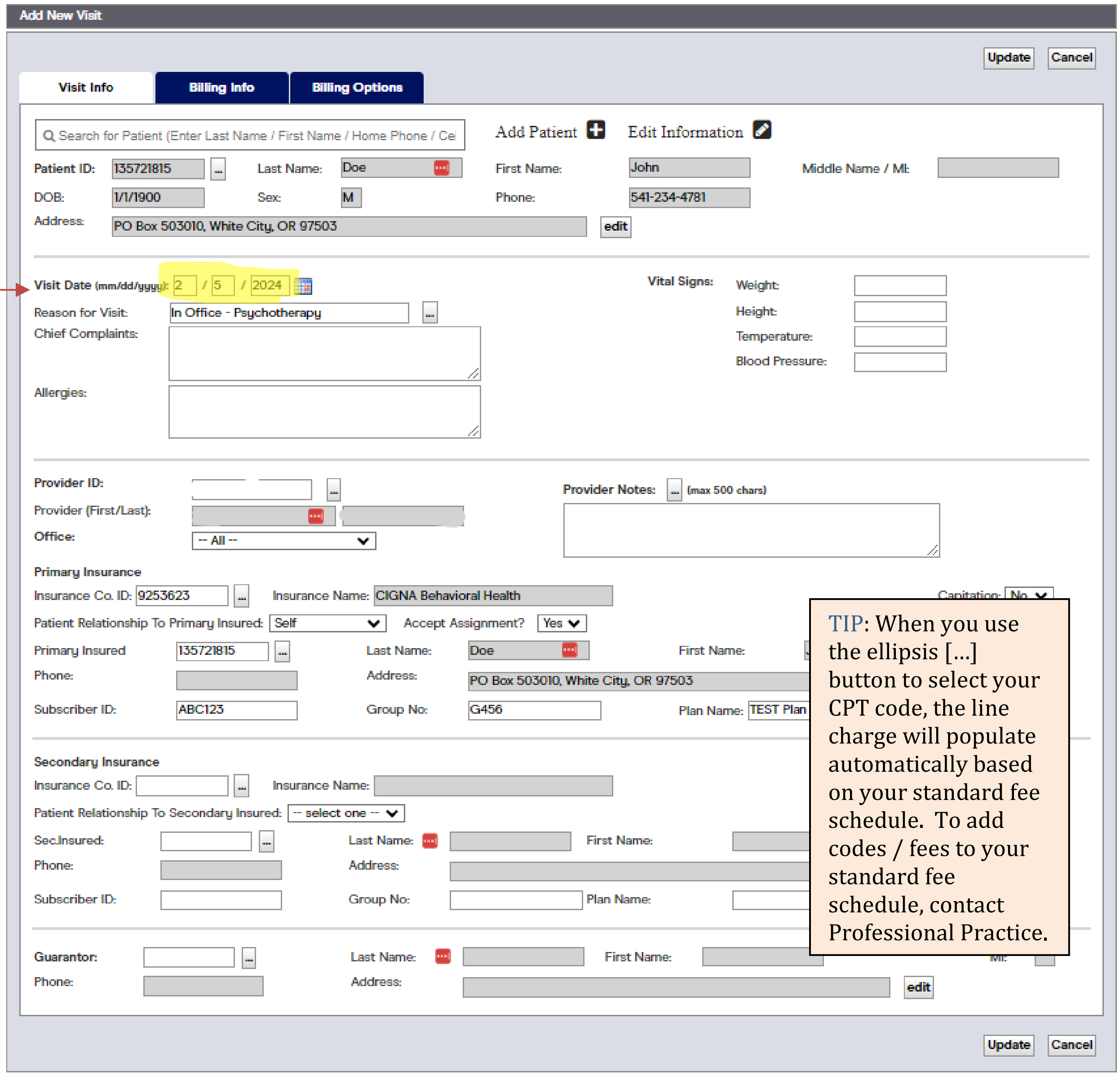


6. You will have three tabs when you add a new visit.

Most routine visits only need info in the first two tabs: "Visit Info" & "Billing Info".



7. **Visit Info Tab.**
    a. **Patient ID.** Review patient name and contact information to ensure that it is correct and current.
    b. **Visit Date**. **Enter the correct date of service.** This field will default to 'today's' date.
    c. *Reason for Visit is an optional field which can be customized. It's useful when you use Practice Mate for appointments and scheduling.*
    d. **Primary / Secondary Insurance**. Review the patient insurance information to ensure that it is correct and current.

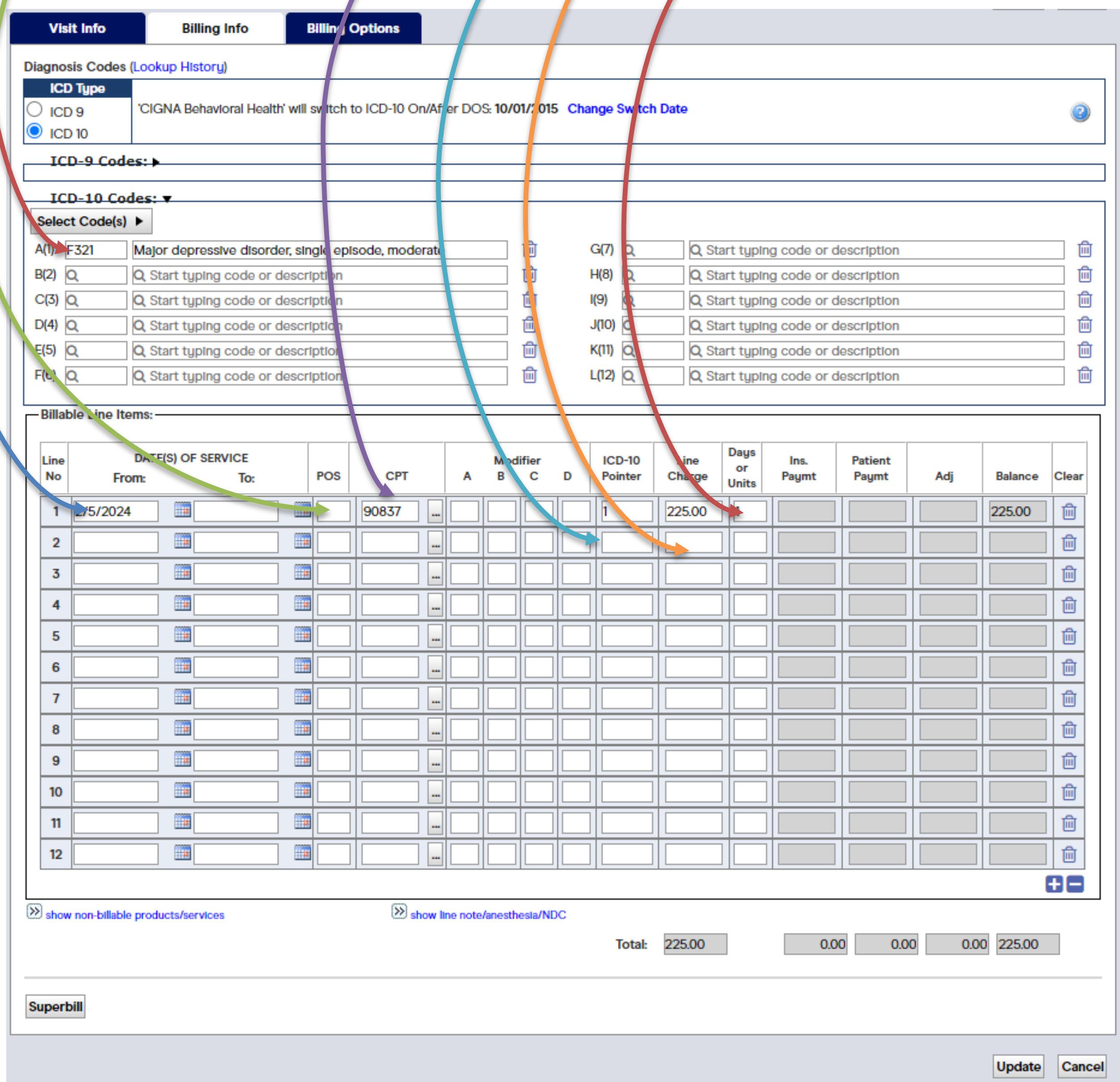


TIP: When you use the ellipsis […] button to select your CPT code, the line charge will populate automatically based on your standard fee schedule. To add codes / fees to your standard fee schedule, contact Professional Practice.

8. **Billing Info Tab.** Check to ensure that the following information is correct and current for the visit being recorded:

a. □ ICD-10 Diagnosis code
b. □ Date of Service
c. □ POS (Place of Service Code)

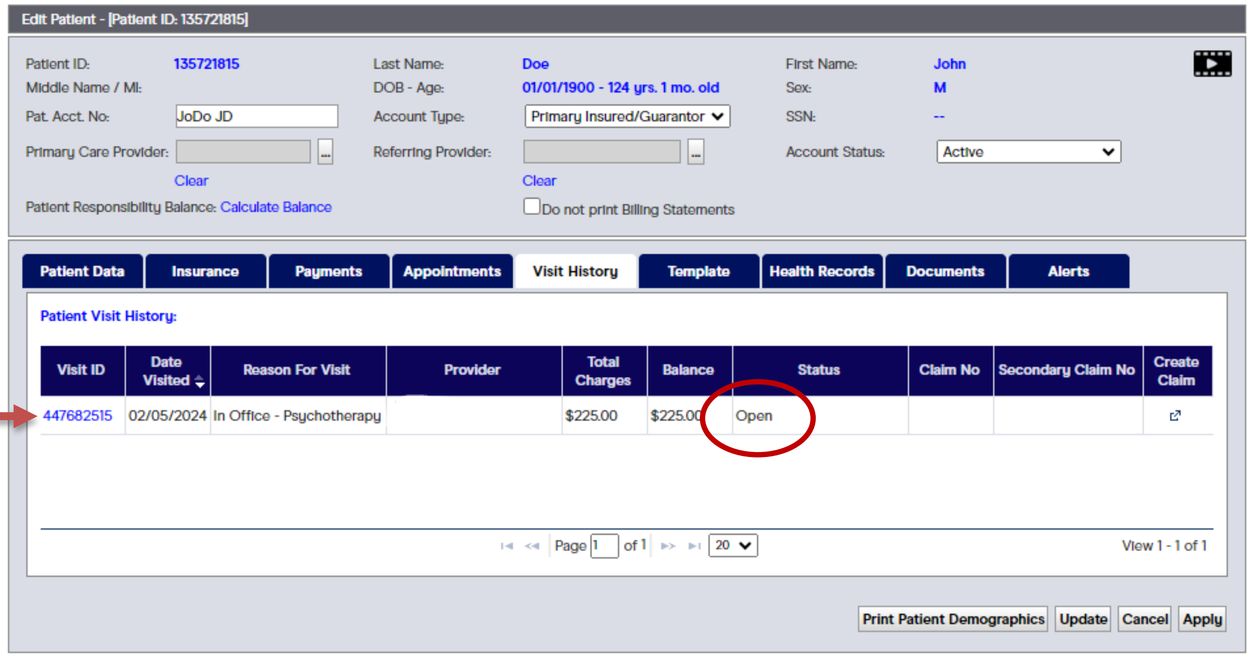
d. □ CPT Procedure Code
e. □ ICD-10 Pointer (usually ‘A’ or ‘1’)
f. □ Line Charge
g. □ Days/Units



9. **Billing Options Tab.** The ‘Billing Options’ tab is used for unusual situations, such as claims to auto insurance, workers compensation insurance, corrected claims, and incident-to claims. Contact Professional Practice if you have claims that will likely be billed this way.

10. **[UPDATE]**. Scroll down and click the [Update] button in the lower right corner.

11. **Visit History**. You will be brought to the patient's 'Visit History' page, showing the new visit that you just entered in "Open" status.



12. **[UPDATE].** Review the charge details to ensure they are correct and click [Update] in the lower right corner.

13. You will be brought back to the *Patient List* in the 'Manage Patients' tab, where you can select another patient to add another new visit.

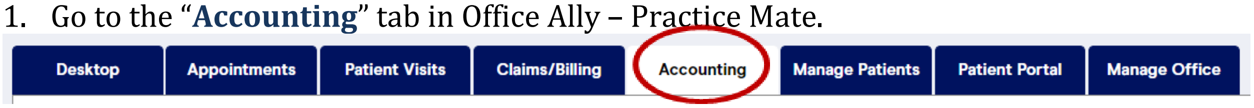
Payment Received (In Office)

Follow these steps to record a payment that you receive directly in your office from a patient.

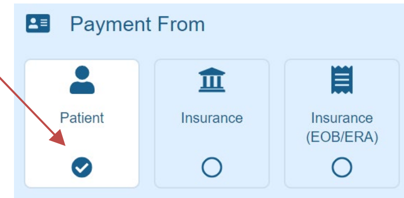
Shortcut to create a new payment = **F8**

NOTE: If you receive payment from an insurance company, please email, fax, or mail the payment (or a copy of the payment) to Professional Practice so that we can record and apply it. Insurance payments must be recorded differently from patient payments, and we often need information from the payment EOB in order to complete the process (ie: bill secondary insurance, apply properly, and calculate patient balance).

1. Go to the "**Accounting**" tab in Office Ally – Practice Mate.



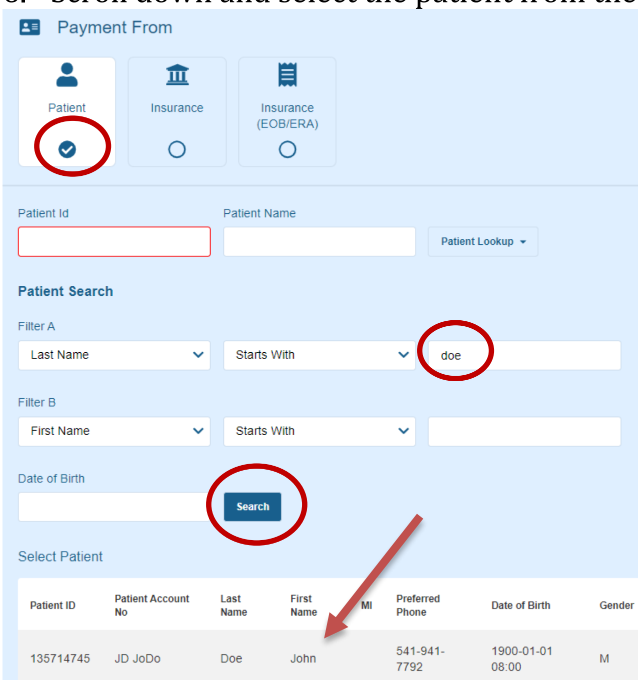
2. Select the office and provider to whom the payment was made.

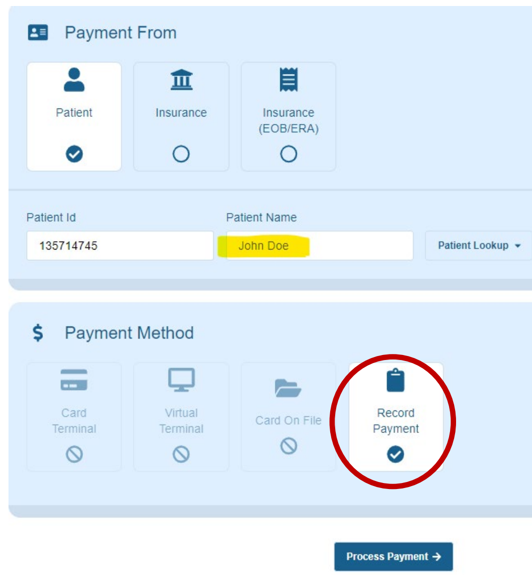


3. Select the ✔ 'Patient' radial button to indicate the payer.

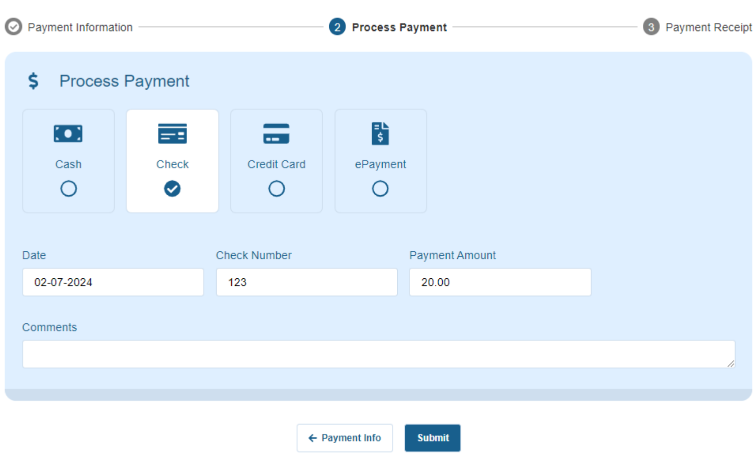
4. Skip the "Patient ID" field unless you happen to know the patient's Office Ally-generated patient ID#.

5. Type in the patient's last name or first name and click [**Search**].
6. Scroll down and select the patient from the patient list below.





7. Click the patient's name to select the patient, and then click the "Record Payment" radial button below.
8. Click [**Process Payment →**] to enter the payment amount and other payment details.
9. In the Process Payment screen, select the correct radial button to indicate the payment method, and enter the payment date and other details as appropriate.



10. **NOTE**: You can record credit card payments made by outside merchant service accounts (like Square, IvyPay, etc) using the "Credit Card" radial button indicator. We are working on setting up functionality for you to be able to process credit cards

from within Office Ally on this screen. I'll let you know when that feature is available.
In the meantime, you're welcome to send us completed credit card payment authorization forms, and we will process/charge and record credit card payments from patients.

11. Click [**Submit**]
12. You will be brought back to the "**Accounting**" screen, and your new payment record should show up as the first payment record on the list.

13. You can apply patient payments yourself, if there are specific instructions for their application. This can be useful in cases where multiple parties are guarantors for one patient's account. Otherwise, we will apply patient payments as indicated by the patient's insurance company when their claims are processed.

Additional Resources.

For more in-depth information on this topic and others, you can access the following links.

Office Ally Support Suite: https://support.officeally.com/
Patient Visits Tab – In Depth Information / Step-by-Step

Office Ally Training Videos (On-Demand)
https://cms.officeally.com/Home/VideoLibrary.aspx