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### STARTED SECURED MESSAGING WITH PATIENTS TO MEET MU CRITERIA

The practice users will be able to communicate with the patient portal users through secured messaging. The system is enhanced in such a way that the 2-way electronic communication is now possible between patients and practice users. This will help the practice to meet the Meaningful Use 2 Core #17 measure.

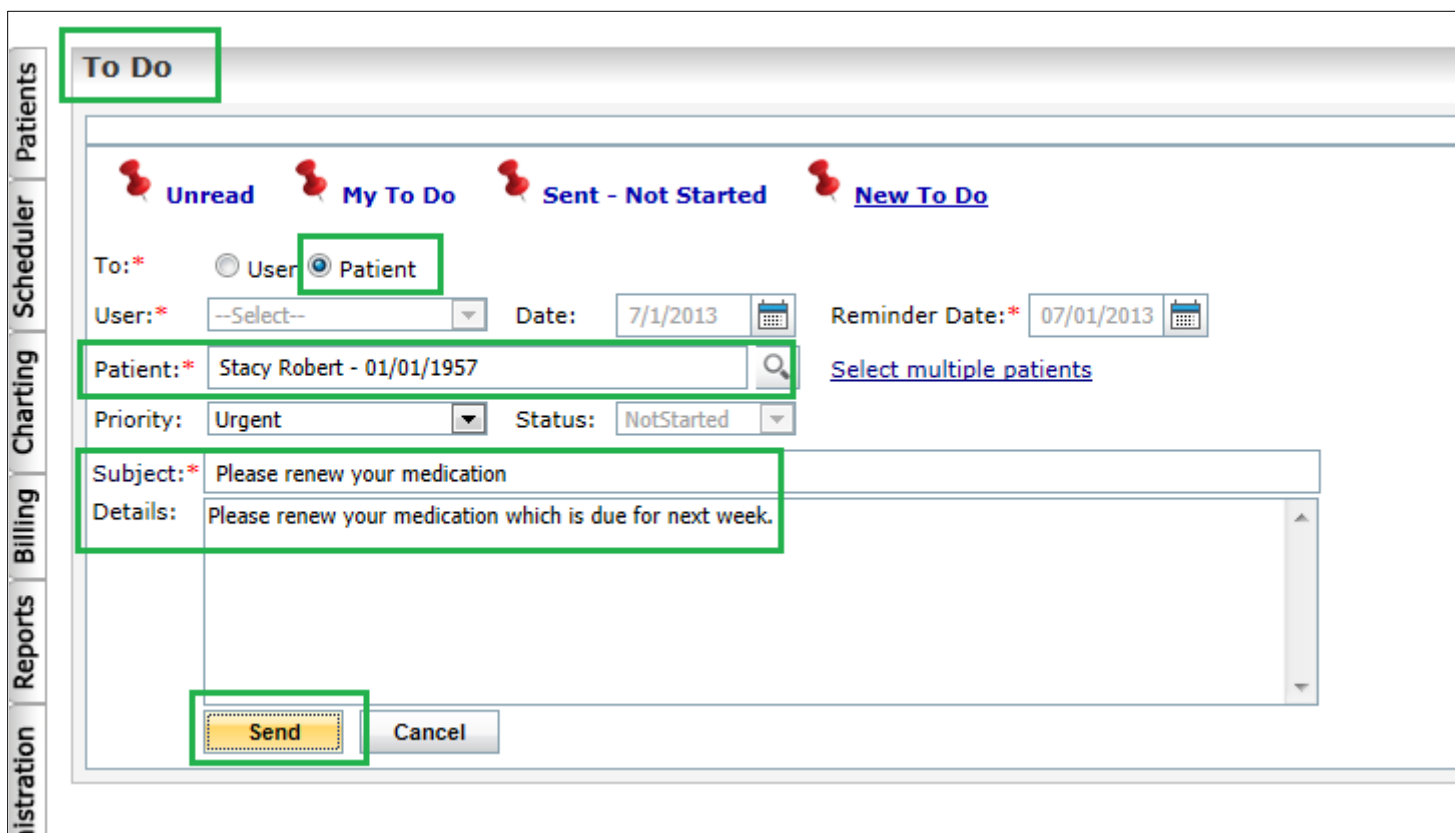
#### SENDING A MESSAGE TO PATIENT

The practice user can communicate with the patient portal user from the To Do section on the Dashboard page. The practice user can send a message and receive it back when the patient portal user responds to the message.

##### To send a message to the patient:

- In the To Do section on the Dashboard page, click New To Do.
- Select the *Patient* option.
- In the *Patient* field, select the patient.
- Enter the brief message in the *Subject* section.
- Enter the detailed message in the *Details* section.
- Click *Send*.

**Figure 1: Sending a Message to Patient**



The screenshot shows the 'To Do' section of the InSync interface. The 'New To Do' button is highlighted. Below it, the 'To:' field has 'Patient' selected. The 'User:' field is set to '--Select--'. The 'Date:' field is set to '7/1/2013'. The 'Reminder Date:' field is set to '07/01/2013'. The 'Patient:' field is set to 'Stacy Robert - 01/01/1957'. The 'Priority:' field is set to 'Urgent'. The 'Status:' field is set to 'NotStarted'. The 'Subject:' field contains 'Please renew your medication'. The 'Details:' field contains 'Please renew your medication which is due for next week.' The 'Send' button is highlighted.

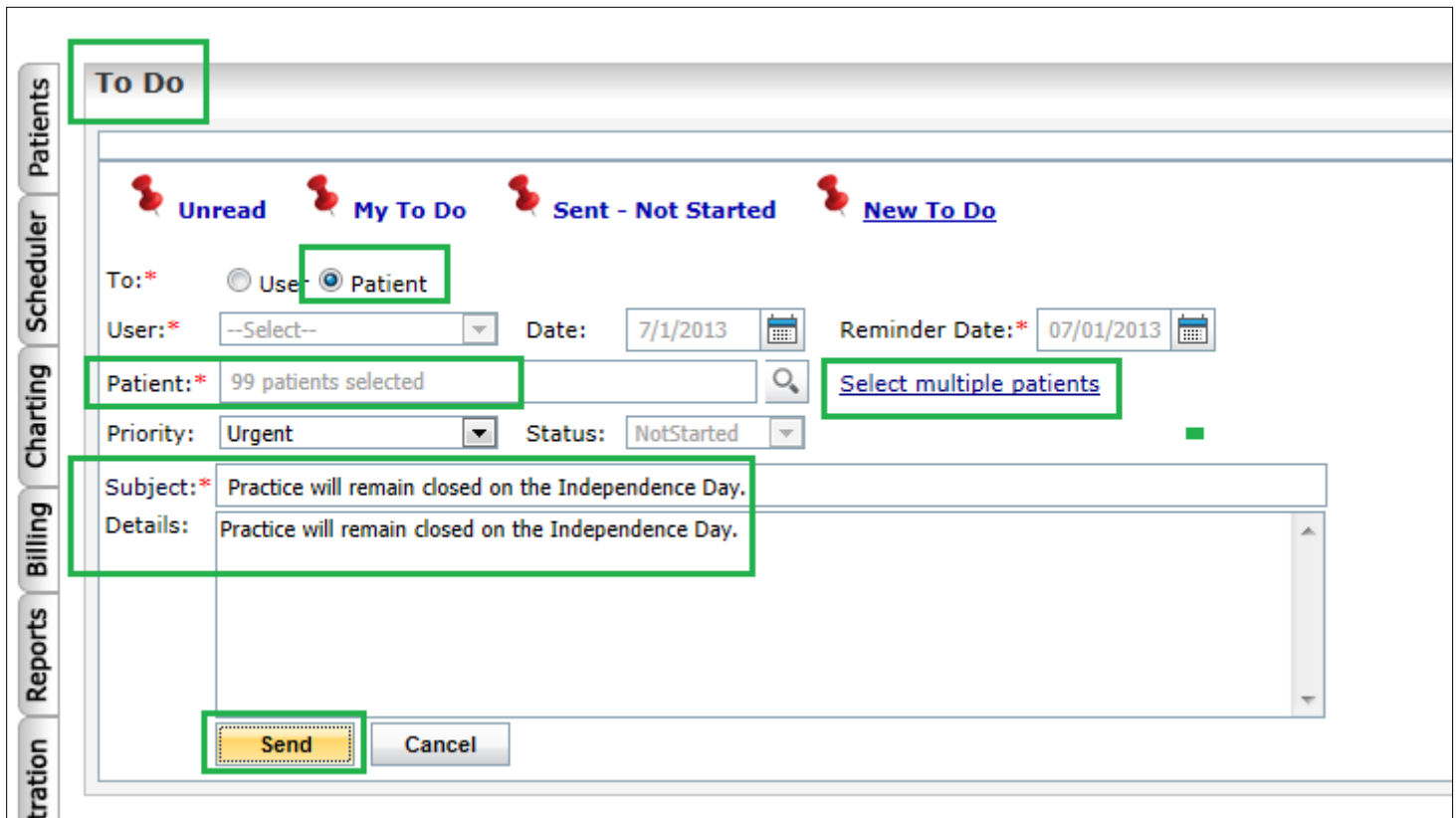
### SENDING A MESSAGE TO MULTIPLE PATIENTS AT ONCE

The practice user can also send the message to multiple patients at once.

#### To send a message to multiple patients:

- In the To Do section on the Dashboard page, click New To Do.
- Select the *Patient* option.
- Click *Select Multiple Patients* link and select the patients to which you want to send the message.
- Enter the brief message in the *Subject* section.
- Enter the detailed message in the *Details* section.
- Click *Send*.

**Figure 2: Sending a Message to Multiple Patients**



The screenshot shows the 'To Do' section of the InSync interface. The 'To' field is set to 'Patient'. The 'User' field is set to '--Select--'. The 'Date' field is set to '7/1/2013'. The 'Reminder Date' field is set to '07/01/2013'. The 'Patient' field shows '99 patients selected' and a 'Select multiple patients' link. The 'Priority' field is set to 'Urgent' and the 'Status' field is set to 'NotStarted'. The 'Subject' field contains the text 'Practice will remain closed on the Independence Day.' and the 'Details' field also contains the same text. The 'Send' button is highlighted in yellow.

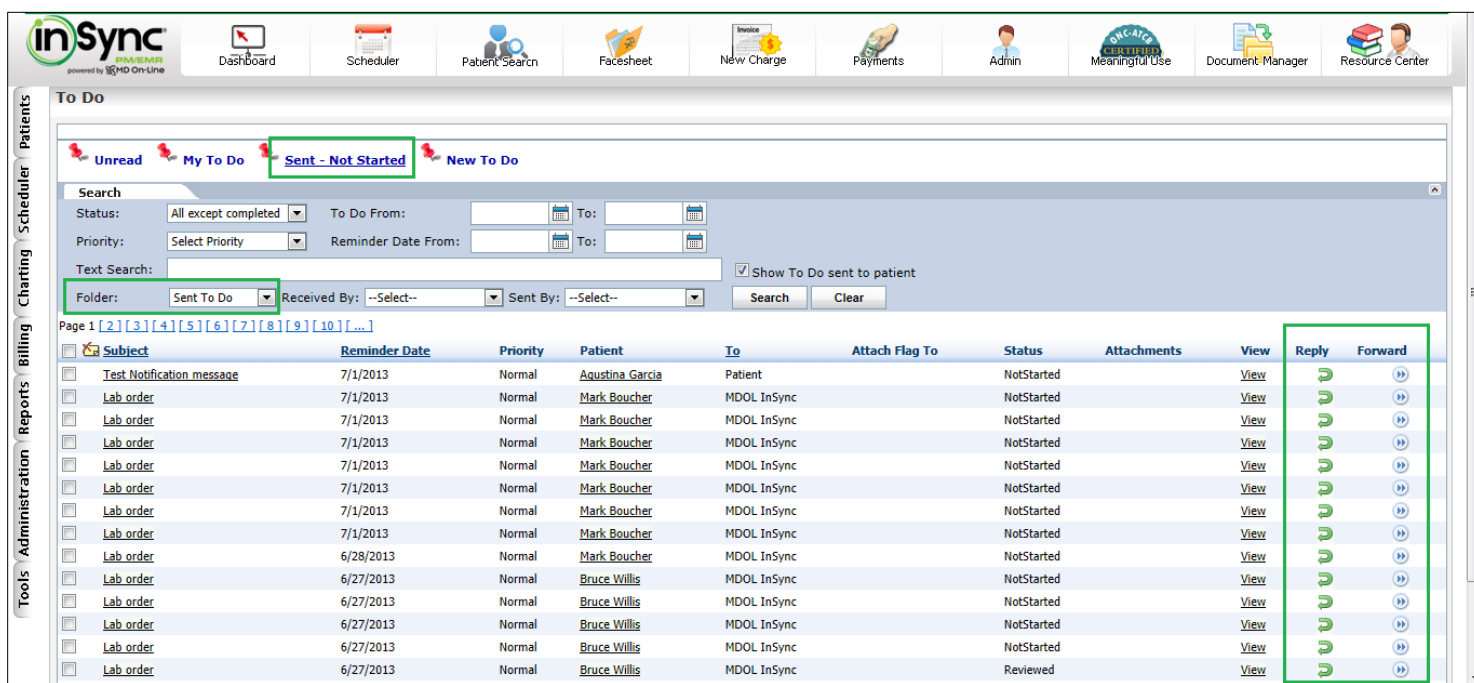
## REPLYING AND FORWARDING MESSAGES FROM SENT ITEMS

The system allows the user to reply and forward the messages from the Sent Items section. Earlier the users were allowed to reply or forward only incoming messages, which is now also possible for sent items.

### To reply to or forward a message from sent items:

- In the To Do section on the Dashboard page, click *Sent – Not Started*.
- Locate the *Reply* and *Forward* options as displayed in screen shot.

**Figure 3: Replying to or Forwarding a Message**



The screenshot shows the InSync dashboard with the 'To Do' section active. The 'Sent - Not Started' tab is selected. Below the tabs, there are search filters for Status, Priority, Text Search, Folder (set to 'Sent To Do'), Received By, and Sent By. A table of messages is displayed with columns: Subject, Reminder Date, Priority, Patient, To, Attach Flag To, Status, Attachments, View, Reply, and Forward. The 'Reply' and 'Forward' buttons are highlighted in green for each message row.

Subject	Reminder Date	Priority	Patient	To	Attach Flag To	Status	Attachments	View	Reply	Forward
Test Notification message	7/1/2013	Normal	Agustina Garcia	Patient		NotStarted		View	Reply	Forward
Lab order	7/1/2013	Normal	Mark Boucher	MDOL InSync		NotStarted		View	Reply	Forward
Lab order	7/1/2013	Normal	Mark Boucher	MDOL InSync		NotStarted		View	Reply	Forward
Lab order	7/1/2013	Normal	Mark Boucher	MDOL InSync		NotStarted		View	Reply	Forward
Lab order	7/1/2013	Normal	Mark Boucher	MDOL InSync		NotStarted		View	Reply	Forward
Lab order	7/1/2013	Normal	Mark Boucher	MDOL InSync		NotStarted		View	Reply	Forward
Lab order	7/1/2013	Normal	Mark Boucher	MDOL InSync		NotStarted		View	Reply	Forward
Lab order	7/1/2013	Normal	Mark Boucher	MDOL InSync		NotStarted		View	Reply	Forward
Lab order	6/28/2013	Normal	Mark Boucher	MDOL InSync		NotStarted		View	Reply	Forward
Lab order	6/27/2013	Normal	Bruce Willis	MDOL InSync		NotStarted		View	Reply	Forward
Lab order	6/27/2013	Normal	Bruce Willis	MDOL InSync		NotStarted		View	Reply	Forward
Lab order	6/27/2013	Normal	Bruce Willis	MDOL InSync		NotStarted		View	Reply	Forward
Lab order	6/27/2013	Normal	Bruce Willis	MDOL InSync		NotStarted		View	Reply	Forward
Lab order	6/27/2013	Normal	Bruce Willis	MDOL InSync		Reviewed		View	Reply	Forward

## CONFIGURING AUTOMATIC NOTIFICATION FOR UNREAD MESSAGES

When the practice user sends messages to the patients that are not read by them, the messages are returned back to the user's *My To Do* section. Such messages are updated with status "Returned unread" in the system. The practice user can configure a specific number of days after which a notification will be sent to the practice user mentioning that the message is returned unread.


### To configure notification for unread messages:

- Select Administration > Practice Management.
- Click the Practice Defaults link.
- Expand the InTouch Secure Messaging Settings panel.
- In the *Automatic notification for patient's unread messages* section, select *Enable*.

- Enter a specific number of days after which you want the unread message to be returned back to the practice user's inbox.
- Click **Save**.

**Figure 4: Configuring Notification for Unread Messages**

**Practice Defaults**

Print Address From:  ☐ Practice ☐ Facility ☒ Space

View Patients Across Facilities: ☒

View Percentile Range in Vitals & SOAP note: ☒

Meaningful Use Reminder Display: ☐ Page ☐ End ☒ Both ☐ None

Meaningful Use Reminder Reporting Period: From:  To:

Allow Self Pay Patients:

Payment Type for Patient Statement: ☒ Visa ☒ Master Card ☒ American Express ☒ Discover

---

**Patient Portal Settings**

User for refill request: --Select--

User for appointment request: --Select--

Display SOAP note on Clinical Summary: ☒ Enable ☐ Disable

---

**InTouch Secure Messaging Settings**

Automatic notification for patient's unread messages: ☒ Enable ☐ Disable  
After  days

Automatically deleting messages from patient's To Do: ☒ Enable ☐ Disable  
After  days

---

**eSignature Pad**











Lock the form after capturing patient signature: ☒ Yes ☐ No

Enable patient signature on provider signed SOAP note: ☒ Yes ☐ No

## To view patient portal user's unread messages:

- On the Dashboard page, click **My To Do**.
- On the To Do page, select the *Returned unread* status.
- Click **Search**.
- A list of messages that were not read by the patient portal user will be displayed.

**Figure 5: Filtering "Returned Unread" Messages**

**inSync**          

**To Do**

Unread **My To Do** Sent - Not Started New To Do

Search





Status:  To Do From:  To:

Priority:  Reminder Date From:  To:

Text Search:

Folder:  Received By: --Select-- Sent By: --Select-- ☒ Show To Do received from patient

Page 3 [1] [2] [4] [5] [6] [7]

Subject	Reminder Date	Priority	Patient	From	Attach Flag To	Status	Attachments	View	Reply	Forward
Epl Yung - ProblemList	5/7/2013	Normal	Aqustina Garcia	Patient		Returned unread		<a href="#">View</a>		
Reminder - Stress Test Order placed	5/7/2013	Normal	Aqustina Garcia	Patient		Returned unread		<a href="#">View</a>		

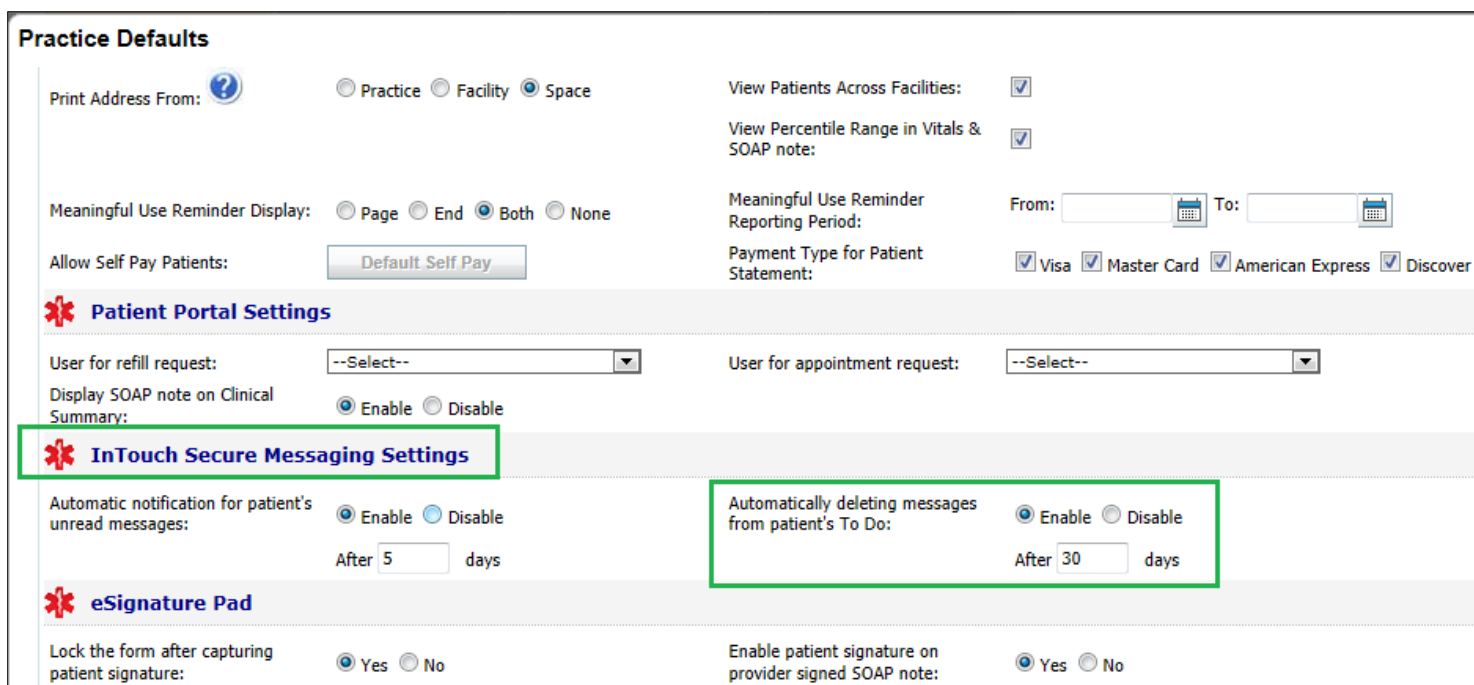
## CONFIGURING AUTOMATIC DELETION FOR REVIEWED MESSAGES

All the messages lying in the patient portal user's inbox should be deleted over a period of time. The system facilitates the practice admin user to configure a specific number of days after which the messages will be automatically deleted from the patient portal user's inbox.

### To configure notification for deleting messages:

- Select Administration > Practice Management.
- Click the Practice Defaults link.
- Expand the InTouch Secure Messaging Settings panel.
- In the *Automatically deleting messages from patient's To Do* section, select *Enable*.
- Enter a specific number of days after which you want to delete the messages from patient portal user's inbox.
- Click *Save*.

**Figure 6: Configuring Notification for Deleting Messages**



The screenshot displays the 'Practice Defaults' configuration page. The 'InTouch Secure Messaging Settings' section is highlighted with a green box. Within this section, the 'Automatically deleting messages from patient's To Do' option is set to 'Enable' with a radio button, and the duration is set to 'After 30 days' in a text input field. Other visible settings include 'Automatic notification for patient's unread messages' set to 'Enable' with a radio button and 'After 5 days' in a text input field. The 'Patient Portal Settings' section above it shows 'User for refill request' and 'User for appointment request' both set to '--Select--'. The 'eSignature Pad' section at the bottom shows 'Lock the form after capturing patient signature' set to 'Yes' with a radio button and 'Enable patient signature on provider signed SOAP note' set to 'Yes' with a radio button.

## STOPPED E-MAILING PASSWORD TO PATIENT PORTAL USERS

Instead of e-mailing a password to the patient portal user, now the system will produce the instructions that can be printed and communicated to the patient. Using these instructions, the patient portal user can change the password with a new password as desired.

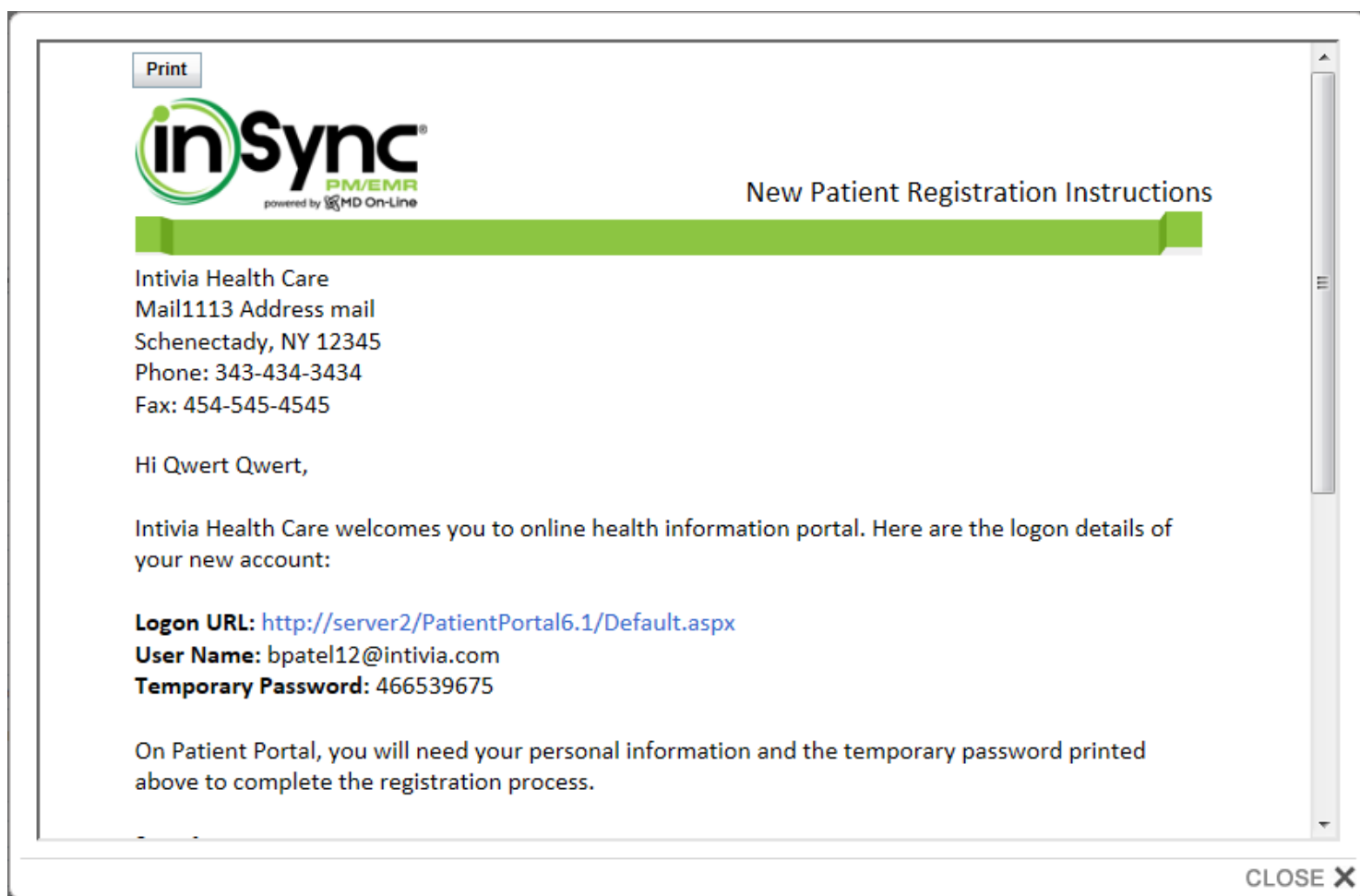
### PRINTING INSTRUCTIONS TO USE PATIENT PORTAL LOG-IN

When you add a patient into the system, there is a provision to allow log-in for the patient portal user. At the time of allowing patient portal log-in, you will be asked to print the instructions, which you can communicate to the patient.

#### To print the instructions to use patient portal login:

- Login with the InSync user.
- Add or edit the patient record.
- On the Primary Address page, select the Allowed Login check box.
- Click Save.
  - The screen appears with instructions on how to use the patient portal log-in.
  - Click Print.

**Figure 7: Printing Log-in Instructions**



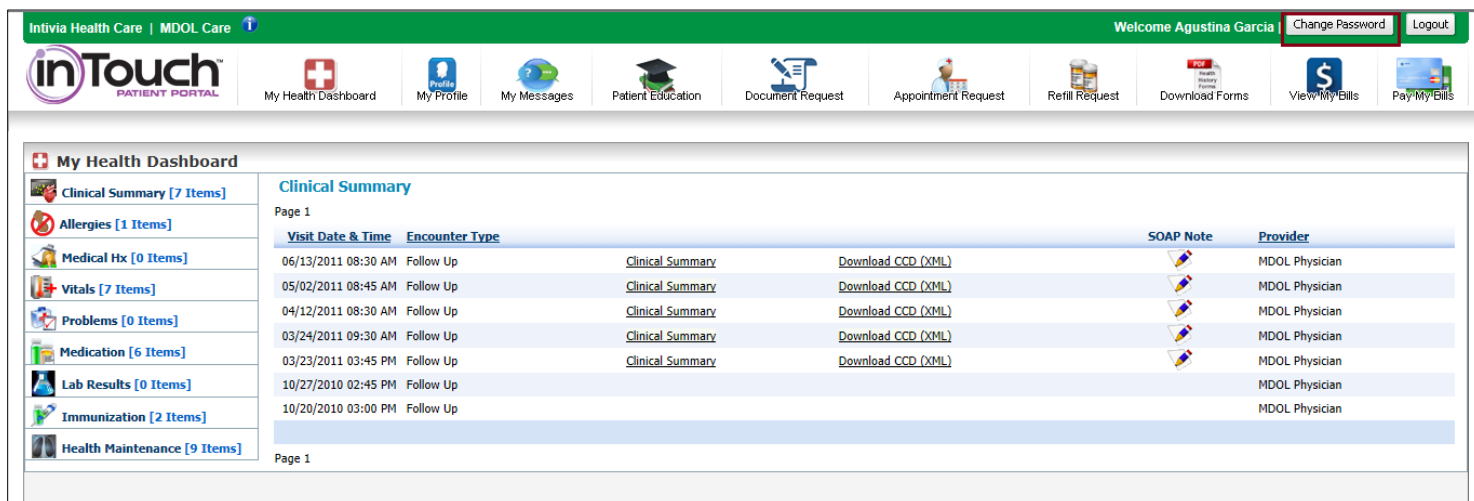
## CHANGING A PASSWORD

Once the practice user prints the instructions to use the patient portal log-in and communicates the information to the patient portal users, they can change the temporary password with a new one as desired.

### To change the patient portal log-in password:

- On the patient portal log-in, the system will be prompted to change the temporary password.
- After successfully changing the temporary password, the user will be allowed to use patient portal.
- The patient portal user can also change the password after the log-in.
- Locate the *Change Password* button on top right corner.

**Figure 8: Changing Patient Portal User Password**



The screenshot shows the InTouch Patient Portal interface. At the top, there is a green header bar with the text 'Intivia Health Care | MDOL Care' on the left and 'Welcome Agustina Garcia' on the right. In the top right corner, there are two buttons: 'Change Password' (highlighted with a red box) and 'Logout'. Below the header bar is a navigation bar with various icons and labels: 'My Health Dashboard', 'My Profile', 'My Messages', 'Patient Education', 'Document Request', 'Appointment Request', 'Refill Request', 'Download Forms', 'View My Bills', and 'Pay My Bills'. The main content area is titled 'My Health Dashboard' and contains a 'Clinical Summary' section. The 'Clinical Summary' section displays a table of clinical encounters with columns for 'Visit Date & Time', 'Encounter Type', 'SOAP Note', and 'Provider'. The table lists several encounters, all with 'MDOL Physician' as the provider. The 'Change Password' button is located in the top right corner of the page.

## RESETTING A PASSWORD

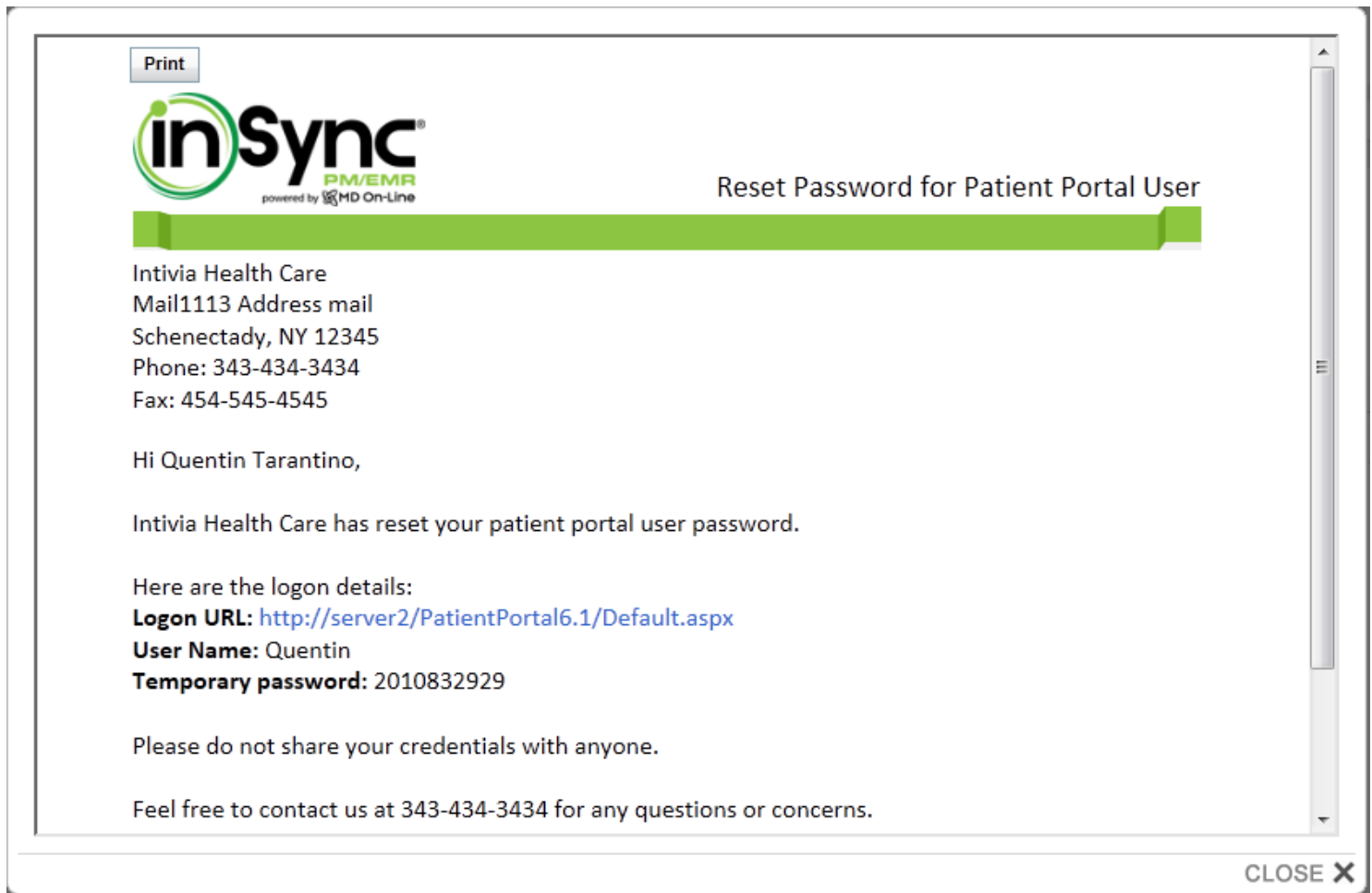
The practice user can reset the password for a patient portal user. On resetting the password, the system will automatically generate a temporary password. The practice user can communicate this temporary password to the patient portal user. Please note that the e-mail will not be transmitted to the patient portal user when resetting the password.

### To reset the patient portal user password:

- Log in with the InSync user.
- Edit the patient record.
- On the Primary Address page, click the Reset Password button.
- The screen appears with new temporary password. Alternatively, an e-mail is sent to the patient portal user informing him/her about password reset (password will not be sent in e-mail).
- Click Print.



**Figure 9: Resetting Patient Portal User Password**



## MINOR CHANGES IN CHARTING

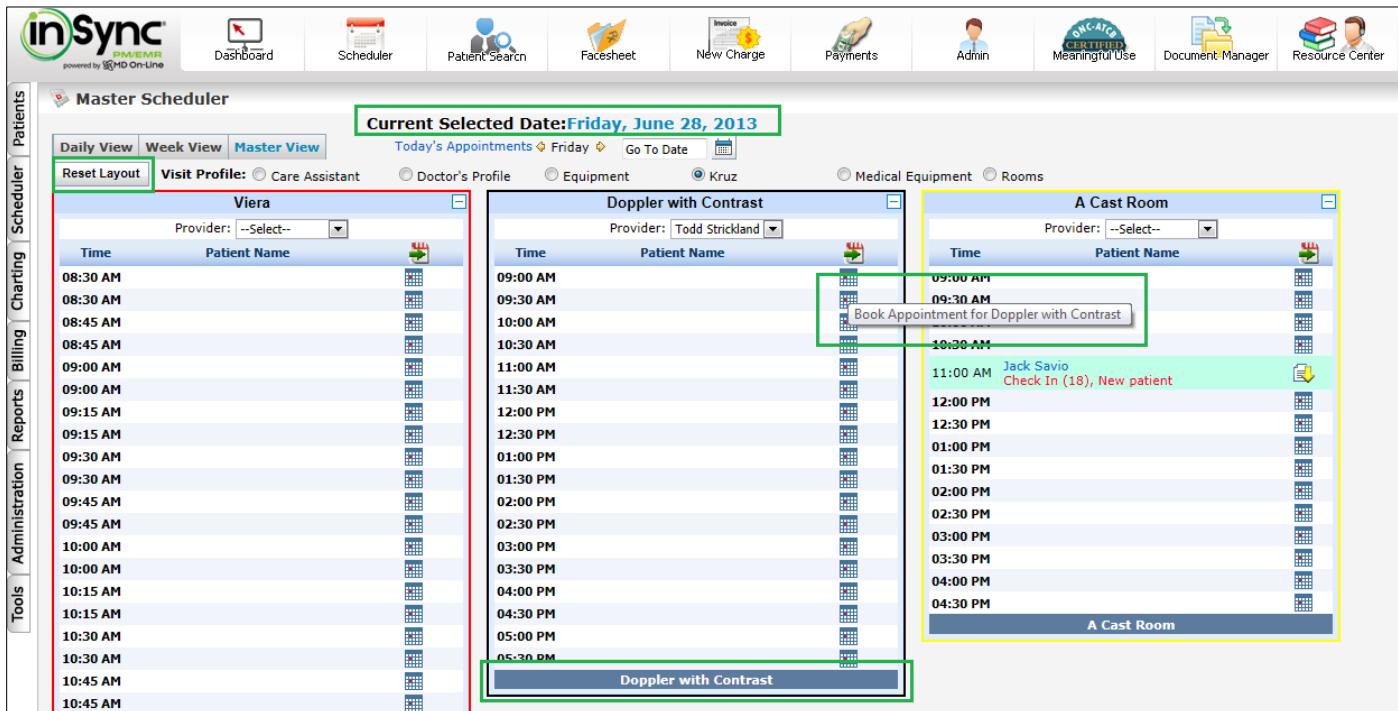
This section includes changes implemented in the Charting module.

## ENHANCED MASTER VIEW IN SCHEDULER

The Master Scheduler screen is enhanced with the minor changes which are described below:

- Introduced the border color to differentiate schedulers from one another.
- Reset Layout button is shifted to top left corner.
- Current Selected Date is shifted to center on top.
- Visit Profile caption is also displayed in the footer on the Master Scheduler.

**Figure 10: Enhanced Master View in Scheduler**



The screenshot displays the InSync Master Scheduler interface. At the top, there is a navigation bar with icons for Dashboard, Scheduler, Patient Search, Facesheet, New Charge, Payments, Admin, Meaningful Use, Document Manager, and Resource Center. Below this, the 'Master Scheduler' section is visible. A 'Current Selected Date' box shows 'Friday, June 28, 2013'. The interface is divided into three main columns, each representing a different provider or location: 'Viera', 'Doppler with Contrast', and 'A Cast Room'. Each column has a 'Provider' dropdown menu and a 'Visit Profile' section with radio buttons for 'Care Assistant', 'Doctor's Profile', 'Equipment', 'Kruz', 'Medical Equipment', and 'Rooms'. The 'Doppler with Contrast' column is highlighted with a green border. A 'Reset Layout' button is located in the top left corner of the scheduler area. The main content area shows a list of appointment slots for each column, with a 'Book Appointment for Doppler with Contrast' button visible in the 'Doppler with Contrast' column. The bottom of the interface shows a 'Tools' sidebar with options like Patients, Scheduler, Charting, Billing, Reports, and Administration.

## PRINTED CPT CODE ON THE SOAP NOTE

The system is enhanced to print the CPT code in the Treatment Plan section on the SOAP Note.

**Figure 11: Printed CPT Code on SOAP Note**

Whitehall Medical Clinic 1		
1830 Owen Dr. New billing address Suite 207 business1 Mason, OH 45040-1111 Phone: 565-656-5656 Fax: 732-200-0647		
Todd T. Strickland, DDS		
Patient Details	Visit Details	Encounter Details
Patient Name: Stacy Robert Age: 56 Year(s) DOB: 01/01/1957 Gender: Male MRN: 0000001466	Visit Date: 06/28/2013	Encounter Date: 06/28/2013 Encounter Type: Follow Up
Treatment Plan		
<ul style="list-style-type: none"> <li>⊞ Labs-&gt; <ul style="list-style-type: none"> <li>⊞ 93000 - Cyanocobalamin</li> <li>⊞ 93010 - Amylase</li> </ul> </li> <li>⊞ Radiology-&gt; <ul style="list-style-type: none"> <li>⊞ 71020 - Ankle X-Ray AP &amp; Lat</li> </ul> </li> <li>⊞ Special Studies-&gt; <ul style="list-style-type: none"> <li>⊞ 71010 - Vision Screening (as indicated)</li> </ul> </li> <li>⊞ Preventative Health-&gt; <ul style="list-style-type: none"> <li>⊞ 99381 - Preventive medicine New PT INFT &lt;1 YR</li> <li>⊞ 99382 - Preventive medicine New PT 1 - 4</li> </ul> </li> </ul>		

## PRINTED E&M CALCULATED CPT ON THE SOAP NOTE

The system is enhanced to display the CPT code in the Treatment Plan section on the SOAP Note that is derived from the E&M calculator.

Whitehall Medical Clinic 1		
1830 Owen Dr. New billing address Suite 207 business1 Mason, OH 45040-1111 Phone: 565-656-5656 Fax: 732-200-0647		
Todd T. Strickland, DDS		
Patient Details	Visit Details	Encounter Details
Patient Name: Stacy Robert Age: 56 Year(s) DOB: 01/01/1957 Gender: Male MRN: 0000001466	Visit Date: 06/28/2013	Encounter Date: 06/28/2013 Encounter Type: Follow Up
Treatment Plan		
<ul style="list-style-type: none"> <li>⊞ Labs-&gt; <ul style="list-style-type: none"> <li>⊞ 0001F - Cyanocobalamin</li> <li>⊞ 93010 - Amylase</li> </ul> </li> <li>⊞ Radiology-&gt; <ul style="list-style-type: none"> <li>⊞ 71020 - Ankle X-Ray AP &amp; Lat</li> </ul> </li> <li>⊞ E &amp; M Code-&gt; <ul style="list-style-type: none"> <li>⊞ 99211 - OFFICE OUTPATIENT VISIT 5 MINUTES</li> </ul> </li> <li>⊞ Special Studies-&gt; <ul style="list-style-type: none"> <li>⊞ 71010 - Vision Screening (as indicated)</li> </ul> </li> </ul>		

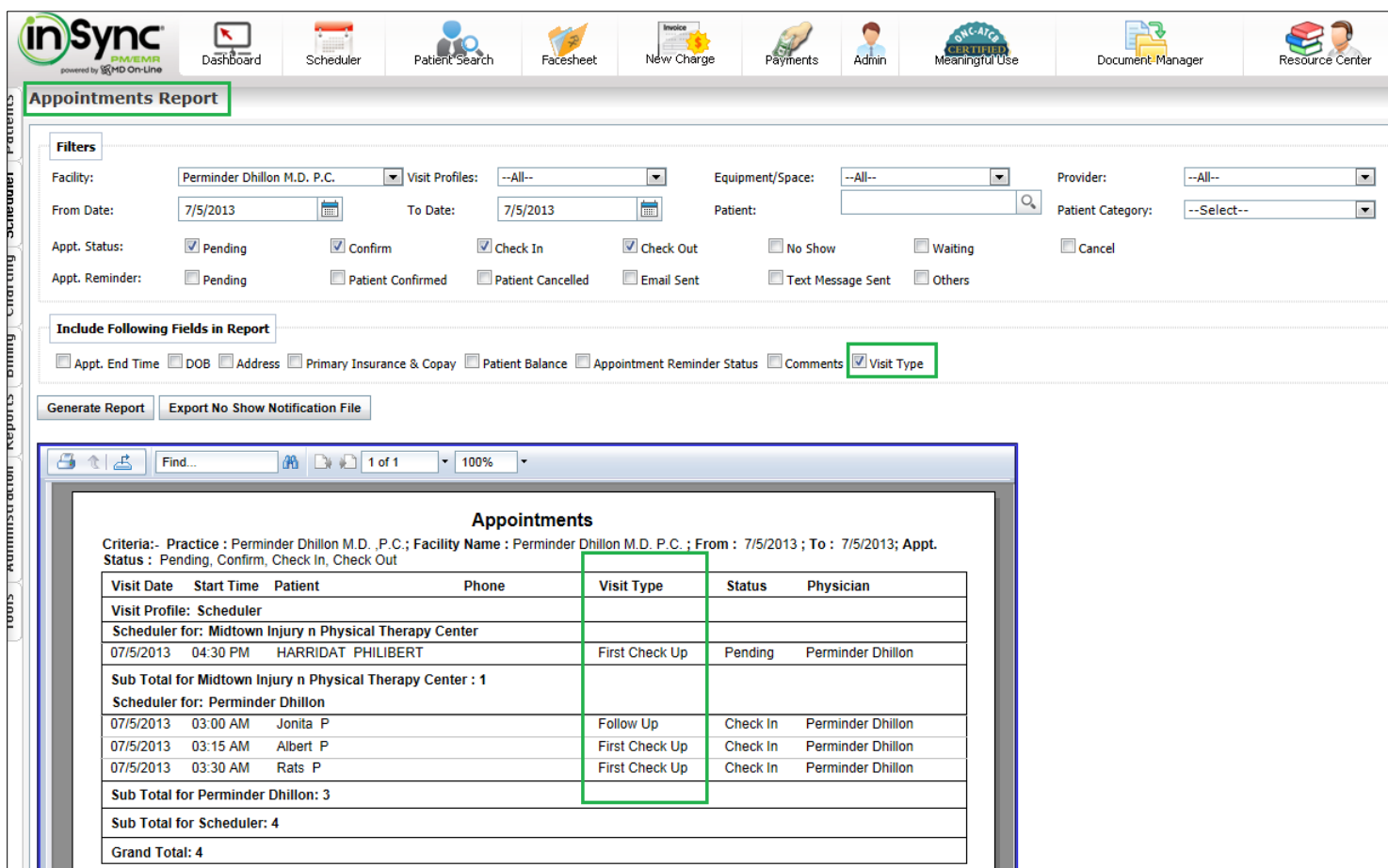
## DISPLAYING “VISIT TYPE” ON THE APPOINTMENTS REPORT

Now you can view the Visit Type field on the Appointments Report.

### To view the Visit Type on the Appointments Report:

- Select Reports > Appointments Report.
- Select the Visit Type check box.
- Select the other details to filter the report.
- Click Generate Report

**Figure 12: Displaying Visit Type on the Appointments Report**



**Appointments Report**

**Filters**

Facility: Perminder Dhillon M.D. P.C. Visit Profiles: --All-- Equipment/Space: --All-- Provider: --All--

From Date: 7/5/2013 To Date: 7/5/2013 Patient: [Search] Patient Category: --Select--

Appt. Status: ☒ Pending ☒ Confirm ☒ Check In ☒ Check Out ☐ No Show ☐ Waiting ☐ Cancel

Appt. Reminder: ☐ Pending ☐ Patient Confirmed ☐ Patient Cancelled ☐ Email Sent ☐ Text Message Sent ☐ Others

**Include Following Fields in Report**

☐ Appt. End Time ☐ DOB ☐ Address ☐ Primary Insurance & Copay ☐ Patient Balance ☐ Appointment Reminder Status ☐ Comments ☒ Visit Type

**Generate Report** **Export No Show Notification File**

**Appointments**

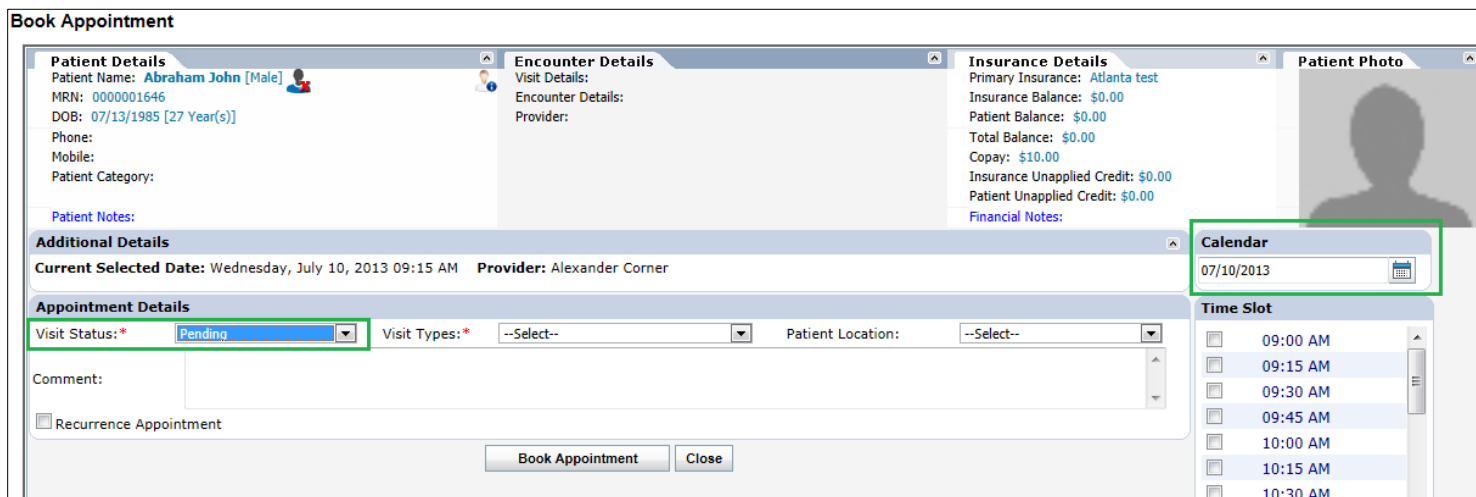
Criteria:- Practice : Perminder Dhillon M.D. P.C.; Facility Name : Perminder Dhillon M.D. P.C. ; From : 7/5/2013 ; To : 7/5/2013; Appt. Status : Pending, Confirm, Check In, Check Out

Visit Date	Start Time	Patient	Phone	Visit Type	Status	Physician
<b>Visit Profile: Scheduler</b>						
<b>Scheduler for: Midtown Injury n Physical Therapy Center</b>						
07/5/2013	04:30 PM	HARRIDAT PHILIBERT		First Check Up	Pending	Perminder Dhillon
<b>Sub Total for Midtown Injury n Physical Therapy Center : 1</b>						
<b>Scheduler for: Perminder Dhillon</b>						
07/5/2013	03:00 AM	Jonita P		Follow Up	Check In	Perminder Dhillon
07/5/2013	03:15 AM	Albert P		First Check Up	Check In	Perminder Dhillon
07/5/2013	03:30 AM	Rats P		First Check Up	Check In	Perminder Dhillon
<b>Sub Total for Perminder Dhillon: 3</b>						
<b>Sub Total for Scheduler: 4</b>						
<b>Grand Total: 4</b>						

## DISPLAYING VISIT STATUS AS PENDING BY DEFAULT FOR FUTURE APPOINTMENTS

When you book a future appointment, the Visit Status will be displayed as Pending by default. You can change the status as desired.

**Figure 13: Displaying Visit Type on the Appointments Report**



**Book Appointment**

**Patient Details**  
 Patient Name: Abraham John [Male]  
 MRN: 0000001646  
 DOB: 07/13/1985 [27 Year(s)]  
 Phone:  
 Mobile:  
 Patient Category:

**Encounter Details**  
 Visit Details:  
 Encounter Details:  
 Provider:

**Insurance Details**  
 Primary Insurance: Atlanta test  
 Insurance Balance: \$0.00  
 Patient Balance: \$0.00  
 Total Balance: \$0.00  
 Copay: \$10.00  
 Insurance Unapplied Credit: \$0.00  
 Patient Unapplied Credit: \$0.00  
 Financial Notes:

**Patient Photo**

**Additional Details**  
 Current Selected Date: Wednesday, July 10, 2013 09:15 AM Provider: Alexander Corner

**Appointment Details**  
 Visit Status\*: Pending  
 Visit Types\*: --Select--  
 Patient Location: --Select--  
 Comment:  
☐ Recurrence Appointment

**Calendar**  
 07/10/2013

**Time Slot**  
☐ 09:00 AM  
☐ 09:15 AM  
☐ 09:30 AM  
☐ 09:45 AM  
☐ 10:00 AM  
☐ 10:15 AM  
☐ 10:30 AM

**Buttons:** Book Appointment, Close


### CHANGES IN BILLING

This section includes changes implemented in the Billing module.

#### ARRANGING CPT, MODIFIER, AND DIAGNOSIS CODE SEQUENCE IN SUPERBILL INTEGRATION

Superbill now maintains a sequence of selection for CPT, Modifier, and Diagnosis made by the user. This sequence will later be displayed on the Superbill Integration pop-up screen where the user can reorder the sequence as desired. The updated sequence on the Superbill Integration screen will then be displayed on the New Charge screen.





Perform the following steps to set the sequence of CPT Codes, Modifier Codes, and Diagnosis Pointers when imported from Superbill and/or Encounter to the New Charge screen:

1. Create a superbill using the Superbill icon  from the Scheduler. Additionally, you can also map the CPT, Modifier, and Diagnosis codes in the encounter through Facesheet.
2. On the Superbill screen, select the CPT, Modifier, and Diagnosis Codes to create a new charge.

**Note:** *The sequence in which you select the codes on Superbill will appear on the Integration screen; however, you can also reorder the sequence from the Integration screen.*

3. Click *Save* and then click *Go To Charge Capture*.
4. The Integration screen appears displaying the CPT, Modifier, and Diagnosis codes in the order you selected them on the Superbill screen.

**Note:** *In the case of importing codes from both Encounter and Superbill, the Integration screen will display the codes in the order they were selected in Encounter and Superbill, respectively.*

6. On the Integration screen, select the “Select to reorder code sequence” check box to reorder the desired code sequence and do the following:
  - a. **Reordering CPTs:** Use the arrow keys ( and ) to reorder the CPT code in the sequence you want them to appear in the line item on the New Charge screen.
  - b. **Reordering Modifiers:** Select the check boxes in the sequence you want them to appear in the line item on the New Charge screen.
  - c. **Reordering Diagnosis Codes and Diagnosis Pointers:**
    - i. Use the arrow keys ( and ) to reorder the Diagnosis codes in the sequence you want them to appear on the New Charge screen.
    - ii. Select the check boxes in the sequence you want the diagnosis pointers to appear in the line item on the New Charge screen.
7. Click *Import Service(s)*.

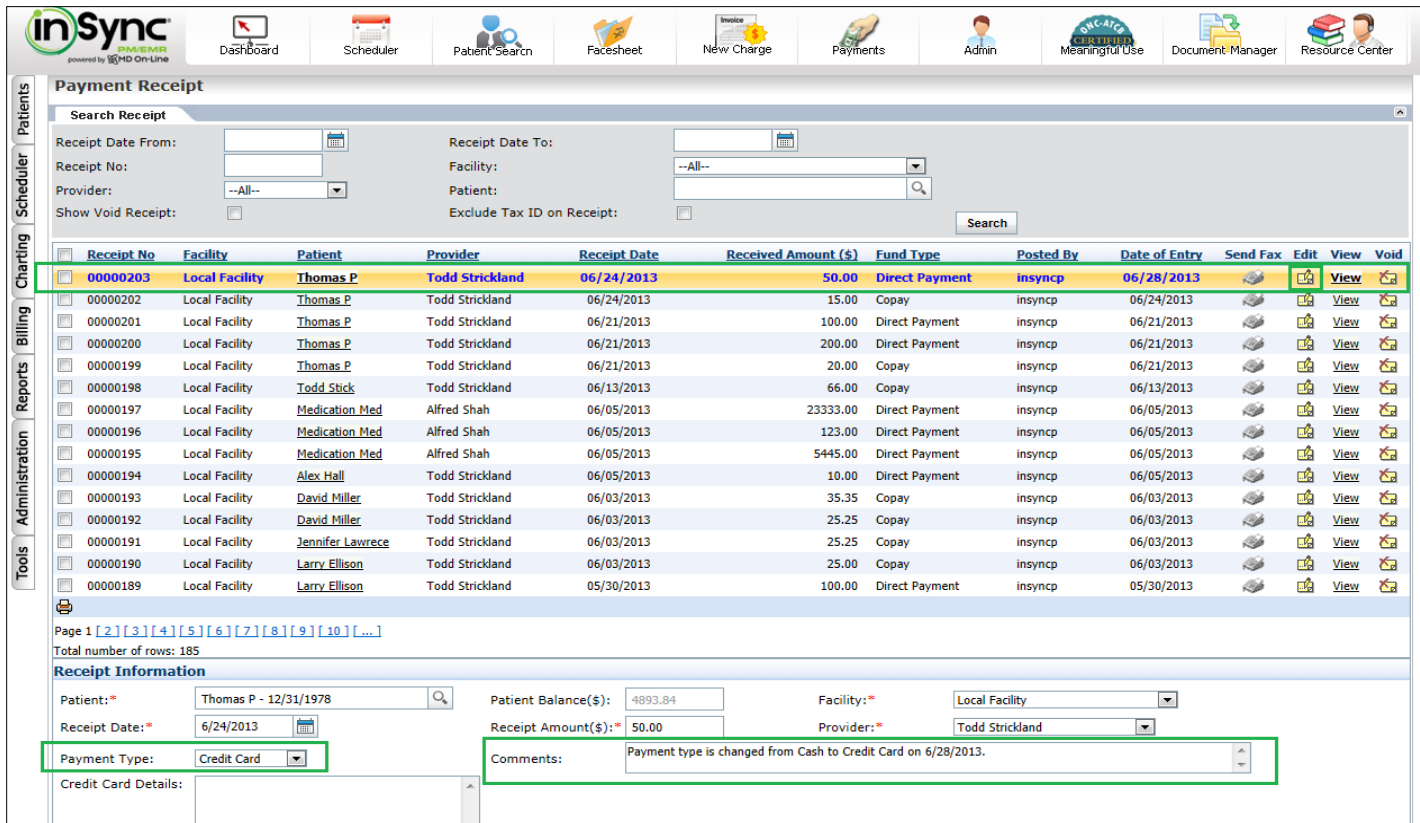
## DISPLAYING A NOTIFICATION ON CHANGING THE PAYMENT TYPE

On the Payment Receipt screen, when you change the payment type option, the system captures this event and displays a notification in the Comments box the next time you update the payment receipt. This gives you an indication that the payment type option was changed in the past.

### To view the notification on updating payment type option:

- Select Billing > Payment Receipt.
- Click Edit Record icon to update the payment type.
- Change Payment Type option from *Cash* to *Credit Card*.
- Click *Save*.
- Again open the same receipt using Edit Record icon.
- A notification is displayed in the Comments box with the date you changed the payment type option.

**Figure 14: Viewing Notification on Updating Payment Type**



**Payment Receipt**

Search Receipt

Receipt Date From:  Receipt Date To:

Receipt No:  Facility:

Provider:  Patient:

Show Void Receipt: ☐ Exclude Tax ID on Receipt: ☐

Receipt No	Facility	Patient	Provider	Receipt Date	Received Amount (\$)	Fund Type	Posted By	Date of Entry	Send Fax	Edit	View	Void
00000203	Local Facility	Thomas P	Todd Strickland	06/24/2013	50.00	Direct Payment	insyncp	06/28/2013	<input type="checkbox"/>	<input type="button" value="Edit"/>	<input type="button" value="View"/>	<input type="button" value="Void"/>
00000202	Local Facility	Thomas P	Todd Strickland	06/24/2013	15.00	Copay	insyncp	06/24/2013	<input type="checkbox"/>	<input type="button" value="Edit"/>	<input type="button" value="View"/>	<input type="button" value="Void"/>
00000201	Local Facility	Thomas P	Todd Strickland	06/21/2013	100.00	Direct Payment	insyncp	06/21/2013	<input type="checkbox"/>	<input type="button" value="Edit"/>	<input type="button" value="View"/>	<input type="button" value="Void"/>
00000200	Local Facility	Thomas P	Todd Strickland	06/21/2013	200.00	Direct Payment	insyncp	06/21/2013	<input type="checkbox"/>	<input type="button" value="Edit"/>	<input type="button" value="View"/>	<input type="button" value="Void"/>
00000199	Local Facility	Thomas P	Todd Strickland	06/21/2013	20.00	Copay	insyncp	06/21/2013	<input type="checkbox"/>	<input type="button" value="Edit"/>	<input type="button" value="View"/>	<input type="button" value="Void"/>
00000198	Local Facility	Todd Strick	Todd Strickland	06/13/2013	66.00	Copay	insyncp	06/13/2013	<input type="checkbox"/>	<input type="button" value="Edit"/>	<input type="button" value="View"/>	<input type="button" value="Void"/>
00000197	Local Facility	Medication Med	Alfred Shah	06/05/2013	23333.00	Direct Payment	insyncp	06/05/2013	<input type="checkbox"/>	<input type="button" value="Edit"/>	<input type="button" value="View"/>	<input type="button" value="Void"/>
00000196	Local Facility	Medication Med	Alfred Shah	06/05/2013	123.00	Direct Payment	insyncp	06/05/2013	<input type="checkbox"/>	<input type="button" value="Edit"/>	<input type="button" value="View"/>	<input type="button" value="Void"/>
00000195	Local Facility	Medication Med	Alfred Shah	06/05/2013	5445.00	Direct Payment	insyncp	06/05/2013	<input type="checkbox"/>	<input type="button" value="Edit"/>	<input type="button" value="View"/>	<input type="button" value="Void"/>
00000194	Local Facility	Alex Hall	Todd Strickland	06/05/2013	10.00	Direct Payment	insyncp	06/05/2013	<input type="checkbox"/>	<input type="button" value="Edit"/>	<input type="button" value="View"/>	<input type="button" value="Void"/>
00000193	Local Facility	David Miller	Todd Strickland	06/03/2013	35.35	Copay	insyncp	06/03/2013	<input type="checkbox"/>	<input type="button" value="Edit"/>	<input type="button" value="View"/>	<input type="button" value="Void"/>
00000192	Local Facility	David Miller	Todd Strickland	06/03/2013	25.25	Copay	insyncp	06/03/2013	<input type="checkbox"/>	<input type="button" value="Edit"/>	<input type="button" value="View"/>	<input type="button" value="Void"/>
00000191	Local Facility	Jennifer Lawrence	Todd Strickland	06/03/2013	25.25	Copay	insyncp	06/03/2013	<input type="checkbox"/>	<input type="button" value="Edit"/>	<input type="button" value="View"/>	<input type="button" value="Void"/>
00000190	Local Facility	Larry Ellison	Todd Strickland	06/03/2013	25.00	Copay	insyncp	06/03/2013	<input type="checkbox"/>	<input type="button" value="Edit"/>	<input type="button" value="View"/>	<input type="button" value="Void"/>
00000189	Local Facility	Larry Ellison	Todd Strickland	05/30/2013	100.00	Direct Payment	insyncp	05/30/2013	<input type="checkbox"/>	<input type="button" value="Edit"/>	<input type="button" value="View"/>	<input type="button" value="Void"/>

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Total number of rows: 185

**Receipt Information**

Patient: \* Thomas P - 12/31/1978

Receipt Date: \* 6/24/2013

Payment Type:

Credit Card Details:

Patient Balance(\$): 4893.84

Receipt Amount(\$): 50.00

Facility: \* Local Facility

Provider: \* Todd Strickland

Comments: Payment type is changed from Cash to Credit Card on 6/28/2013.

## AUTOMATICALLY POPULATING DIAGNOSIS POINTERS ON NEW CHARGE

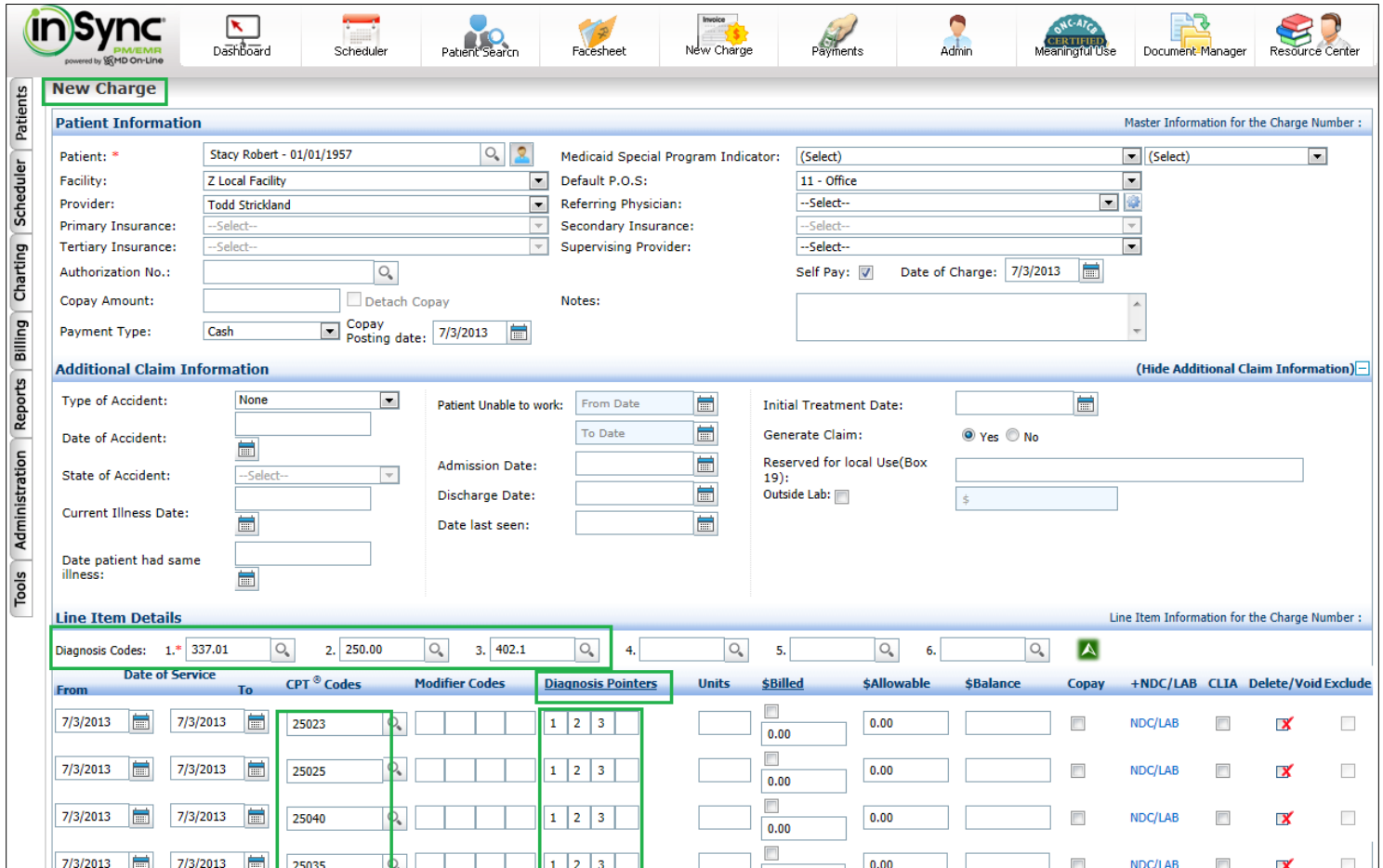
When creating a charge, instead of typing the diagnosis pointers, you can automatically populate them in the line items.

### To automatically populate diagnosis pointer(s):

- Select Billing > New Charge.
- Enter the patient information.
- In the Diagnosis Codes section, enter the diagnosis code(s).
- In the Line Item Details section, enter all the CPT codes one by one and then click *Diagnosis Pointers* link.
- The diagnosis pointers will be automatically entered for all the CPTs. Change the sequence as desired.

**Note:** The system will skip auto-populating diagnosis pointers if they are already entered by the user.

**Figure 15: Automatically Populating Diagnosis Pointers**



The screenshot shows the 'New Charge' form in the InSync PM/EMR system. The 'Line Item Details' section is highlighted, showing a table of charges with diagnosis pointers automatically populated for CPT codes 25023, 25025, 25040, and 25035. The 'Diagnosis Pointers' column for each row shows the sequence '1 2 3'.

From	Date of Service	To	CPT Codes	Modifier Codes	Diagnosis Pointers	Units	\$Billed	\$Allowable	\$Balance	Copay	+NDC/LAB	CLIA	Delete/Void	Exclude
7/3/2013	7/3/2013	7/3/2013	25023		1 2 3		0.00	0.00			NDC/LAB		X	
7/3/2013	7/3/2013	7/3/2013	25025		1 2 3		0.00	0.00			NDC/LAB		X	
7/3/2013	7/3/2013	7/3/2013	25040		1 2 3		0.00	0.00			NDC/LAB		X	
7/3/2013	7/3/2013	7/3/2013	25035		1 2 3		0.00	0.00			NDC/LAB		X	