Automated Office Procedures
BUSI 012
Lytec Module

Introduction

MODULE MATERIAL:

- Assignment sheet (for optional/supplemental assignment)

PERIPHERAL CONSIDERATIONS:

- Pre-load lecture and check sound.

Automated Office Procedures
BUSI 012

Joy Gayler, Instructor
864-578-8770, Ext. 250
jgayler@sherman.edu

TOPIC: INTRODUCTION TO PRACTICE MANAGEMENT SOFTWARE

CONCEPTS TAUGHT:

- Insurance terminology
- Basic billing / insurance concepts
- Coding considerations
- Practice Management Software as a tool

SUMMARY:

Using a PowerPoint®, narrated lecture (also available on class website), students are introduced to the basic concepts and terminology in a practice setting with regard to coding, billing and insurance filing.

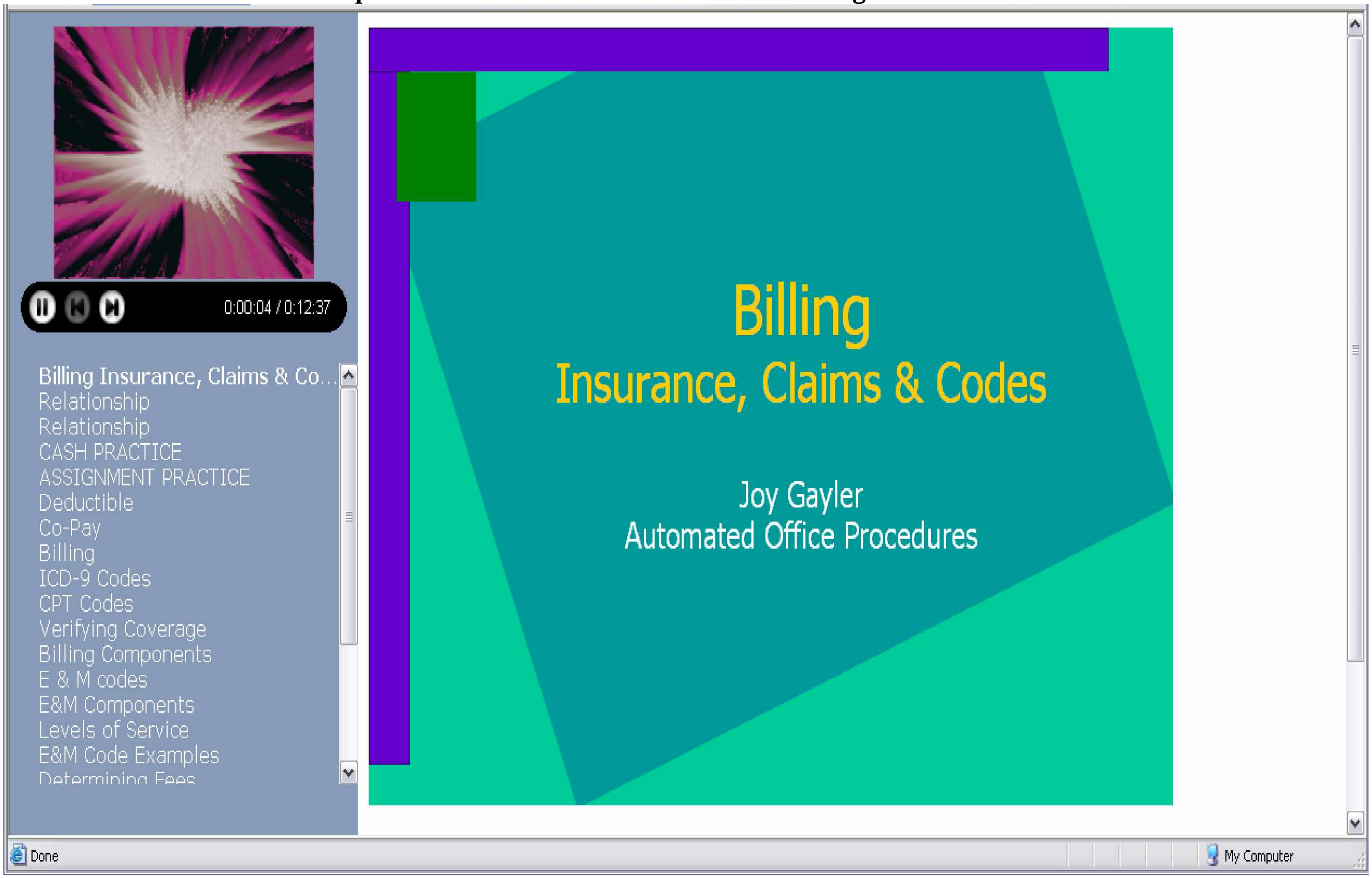
Supplemental assignment of online search for coding and billing websites is sometimes given. Students are instructed to post answers to class website's forum.

PURPOSE:

Basic concept exposure for following assignments.

Some assignment sections have been omitted or altered due to copyright issues regarding the reprinting of CPT codes and ICD-9 codes.

Screenshot of title slide of narrated Billing, Insurance, Claims and Codes PowerPoint lecture. The presentation is made available online through course web site.



Automated Office Procedures
BUSI 012

Lytec Set up

MODULE MATERIAL:

- Assignment packet
  - -set-up instructions
  - - insurance companies
  - - ICD-9 codes
  - - CPT codes
  - - other various codes

PERIPHERAL CONSIDERATIONS:

- Chirocode Deskbook® as reference source

Automated Office Procedures
BUSI 012

Joy Gayler, Instructor
864-578-8770, Ext. 1250
jgayler@sherman.edu

TOPIC: LYTEC: SET UP AND ENTERING CODES

CONCEPTS TAUGHT:

- Simple database concepts
- Coding and billing components
- Practice Management Software as a practice building tool

SUMMARY:

Using Lytec Practice Management Software®, students will "run" a hypothetical office for the remainder of the quarter.

During this module, students will "set up" their practice within the software (database). They will input their specific provider information as well as a short lists of the following: insurance companies, ICD-9 and CPT codes.

Instructor will lead students through the steps to enter each information component. All instructions are replicated in the actual assignment handouts for easy reference.

PURPOSE:

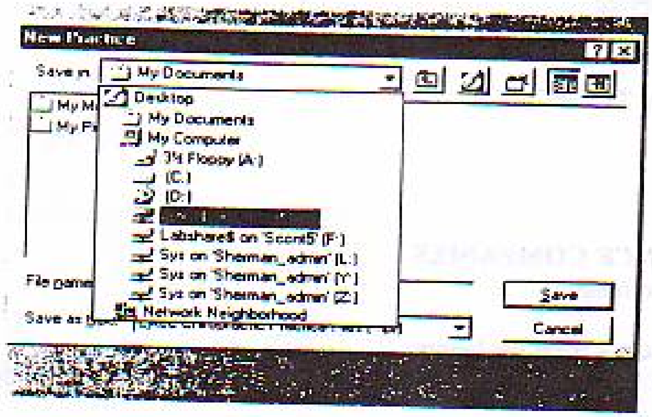
Understand components needed and how utilized within database-driven practice management software.

Launch Lytec Chiropractic. Click this icon Lytec Chiropractic on the desktop or go: Start → Programs → Lytec Chiropractic.

SETTING UP YOUR PRACTICE

Go File → New Practice

1. In the **Save In:** box, pull down the arrow ▼ and navigate to **Lytec$ on 'scent3" (L):** and click on it.



2. Look toward the bottom of the practice box and locate the field "File name" and type in your hypothetical practice name. ie, *John Q Doe, D.C.* or *Doe Chiropractic Center*
3. Click **Save**.

ENTERING YOUR PRACTICE INFO

Go Settings → Practice

1. Enter your information
2. Choose "solo practice" for Practice Type
3. Click OK

SETTING YOUR PREFERENCES

Go Settings → Preferences

1. On the Charges and Payments Tab, check the box next to Use *Patient's permanent diagnosis codes in new billings.*

ENTERING TRANSACTION/PROCEDURE CODES AND FEES

Go Lists → Transaction Codes

1. Click New
2. In top field, enter Procedure/Transaction Code from list attached.
3. Click *Description* Tab,
    a. Enter description from list
    b. In *type* field, choose "procedure-unclassified"
4. Click the *Fee Schedule* Tab
    a. One the first row, in the charge column, enter the charge from the list I gave you.
        i. If code has a *second* fee schedule (see list), enter the second charge on the second row and follow the remaining steps, as well.
    b. Scroll horizontally across to the last category, *CPT Code*, and enter the CPT code (again).
5. Click the Defaults Tab
    a. Choose/enter "11" in the location field
    b. For *Type of Service* field, enter "04" for x-rays codes and "C" for all other codes (see Place and Type of Service Codes List)
6. Click Save.
7. Repeat procedure for remaining codes.

TRANSACTION/PROCEDURE CODE LIST

ADDING ICD-9 CODES, CPT CODES AND FEES

Automated Office Procedures 012

Launch Lytec Chiropractic and open your practice.

ENTERING DIAGONSIS CODES

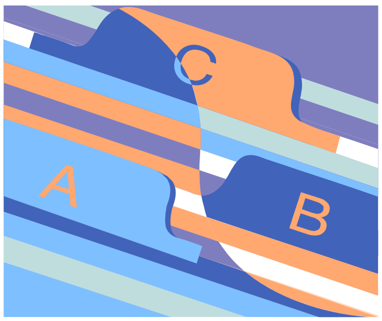
Go Lists → Diagnosis Codes

1. Click New
2. Enter diagnosis codes from list attached. (see below)
3. Enter description from list
4. Enter the actual ICD-9 code from list
5. Choose "none" for graphics category.
6. Click save.
7. Repeat procedures for remaining codes.

DIAGNOSIS CODE LIST

Automated Office Procedures
BUSI 012

Entering Patients



MODULE MATERIAL:

- Assignment packet
  - -patient info
  - - insurance info
  - -diagnostic codes

PERIPHERAL CONSIDERATIONS:

- Chirocode Deskbook® as reference source

Automated Office Procedures
BUSI 012

Joy Gayler, Instructor
864-578-8770, Ext. 250
jgayler@sherman.edu

TOPIC: LYTEC: ENTERING PATIENTS

CONCEPTS TAUGHT:

- Simple database concepts
- Patient data components
- Practice Management Software as a practice management tool
- Entering patient claim information
- Insurance verification and coverage
-

SUMMARY:

Using Lytec Practice Management Software®, students will "run" a hypothetical office for the remainder of the quarter.

During this module, students will enter 4 hypothetical patients and their "history." Personal info, insurance info, and diagnostic codes for each patient will be entered and assigned to their respective "charts" within Lytec.

Using a "John Doe" patient, instructor will lead students through the steps to enter each information component. Students enter remaining patients on their own. Instructions are contained in handout packet for easy reference.

PURPOSE:

Understand components needed and how utilized within database-driven practice management software.

CHIROPRACTIC REGISTRATION AND HISTORY

1 PATIENT INFORMATION

Date 01/12/05

Patient JOHN DOE

Address 174 ELM STREET

SPARTANBURG, SC 29302
City State Zip

Sex: [X] M [ ] F Age 42 Birthdate 09/26/61

[ ] Single [X] Married [ ] Widowed [ ] Separated [ ] Divorced

Patient SS# 529-21-7443

Occupation EDUCATOR

Employer DISTRICT 6 SCHOOLS

Employer Address ______

Employer Phone ______

Spouse's Name JANE

Birthdate ______ SS# ______

Occupation ______

Spouse's Employer ______

Whom may we thank for referring you? ______

2 INSURANCE

Who is responsible for this account? JOHN DOE

Relationship to

Insurance Co.

Group # —

Is patient cove

Subscriber's N

Birthdate 0

Relationship t

Insurance Co.

Group #

ASSIGNMENT AND RELEASE

I, the undersigned certify that I (or my dependent) have insurance coverage with BCBS and assign directly to Dr. LOTTOMEYER all insurance benefits, if any, otherwise payable to me for services rendered. I understand that I am financially responsible for all charges whether or not paid by insurance. I hereby authorize the doctor to release all information necessary to secure the payment of benefits. I authorize the use of this signature on all insurance submissions.

John Doe
Responsible Party Signature

Relationship ______ Date 01/12/05

3 PHONE NUMBERS

Home 592-1243 Work 585-1766 Ext 190

Best time and place to reach you ______

IN CASE OF EMERGENCY, CONTACT

Name JANE DOE Relationship WIFE

Home Phone 592-1243 Work Phone —

4 ACCIDENT INFORMATION

Is condition due to an accident? [ ] Yes [X] No Date ______

Type of accident [ ] Auto [ ] Work [ ] Home [ ] Other

To whom have you made a report of your accident?

[ ] Auto Insurance [ ] Employer [ ] Worker Comp. [ ] Other

Attorney Name (if applicable) ______

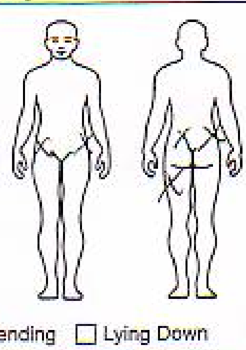
5 PATIENT CONDITION

Reason for Visit low back pain, muscles very sore

When did your symptoms appear? last week

Is this condition getting progressively worse? [X] Yes [ ] No [ ] Unknown

Mark an X on the picture where you continue to have pain, numbness, or tingling.



Rate the severity of your pain on a scale from 1 (least pain) to 10 (severe pain) 7

Type of pain: [ ] Sharp [X] Dull [ ] Throbbing [ ] Numbness [X] Aching [ ] Shooting [ ] Burning [ ] Tingling [ ] Cramps [X] Stiffness [ ] Swelling [ ] Other

How often do you have this pain? daily

Is it constant or does it come and go? constant; dull

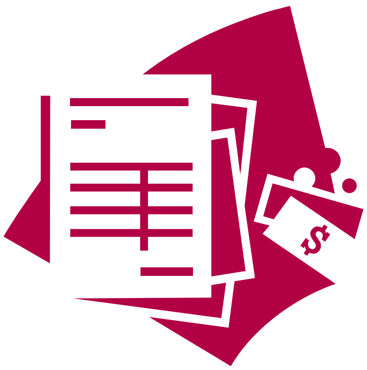
Does it interfere with your [ ] Work [ ] Sleep [X] Daily Routine [ ] Recreation

Activities or movements that are painful to perform [X] Sitting [X] Standing [ ] Walking [X] Bending [ ] Lying Down

– OVER –

Automated Office Procedures
BUSI 012

Billing and Charges



MODULE MATERIAL:

- Assignment packet
  -patient progress notes
  -CMS-1500 form
  -Medicare filing rules

PERIPHERAL CONSIDERATIONS:

- Chirocode Deskbook® as reference source

Automated Office Procedures
BUSI 012

Joy Gayler, Instructor
864-578-8770, Ext. 250
jgayler@sherman.edu

TOPIC: LYTEC: BILLING AND CHARGES

CONCEPTS TAUGHT:

- Coding and Billing concepts
- Insurance filing concepts
- Practice Management Software as a practice management tool

SUMMARY:

Using Lytec Practice Management Software®, students will “run” a hypothetical office for the remainder of the quarter.

During this module, students will enter charges into Lytec for their hypothetical patients.

Each patient case file contains progress notes with diagnostic codes and procedures entered. Students will translate this information into ICD-9 and CPT codes and enter them appropriately for billing and insurance filing purposes.

Instructor will lecture on CMS (HCFA)-1500 claim form sections during this module. Specific rules for filing to Medicare will also be discussed.

Using a “John Doe” patient, instructor will lead students through the steps to enter each information component. Students enter remaining patient charges on their own. Instructions are contained in handout packet for easy reference.

PURPOSE:

Understand billing and insurance components and how utilized within database-driven practice management software.

AUTOMATED OFFICE PROCEDURES 012
Lytec: More Billing, Patient History Ledger, Transaction Journal

Scenario: A week or two has passed since your last billing. You need to:

- Input all your billable patient encounters for your hypothetical patients since your last billing.
- These encounters will go on a NEW billing for each patient.
- Use the dates listed below
- **Use the same ICD-9 and CMT codes as before** (refer to your patient progress notes from previous assignment)

For **Andrew Martin**, add these visits:
01/30/2004
02/06/2004
02/12/2004

For **Linda Martin**, add these visits:
02/02/2004
02/09/2004
02/16/2004

For **Claude Hughes**, add these visits:
02/11/2004
02/16/2004
02/23/2004

Go Billing → Charges & Payments

- DON'T PRINT THIS TIME (In reality, of course you would print, but we're saving paper.)
- **Save.**

Scenario: Mr. Claude Hughes asks you how many visits you billed to Medicare, OR how many visits does he have left? (Remember, Medicare has a visit limit).

You can go into Lytec and pull up his patient history file. Here's how:

Go Reports → Patient Ledger

- Click the second tab labeled **Range.**
- In the **Patient field,** type or select Mr. Hughes' chart name. Make sure his chart name appears in the second patient field as well. (This means you've selected just him, and not him plus everyone else that follows him alphabetically.)
- Click the **preview button** to view his history, and then click the **print icon** in the top left corner of that screen.

Scenario: You've just completed a billing for this week, month, day, whatever. You need to print a paper copy (Transaction Journal) of this to keep in a file, just in case the unthinkable happens and your computer's hard drive crashes, losing all your data, and you have no other backup. The paper copy will be your back up.

- Go Reports → Transaction Journal
- Click **ranges** tab
- In **Billing Dates** field, type 01/01/2004 ----- today's date.
- Click the **preview button**.
- Click the **print icon** in the top left corner.

Turn in all printed materials. Make sure your name appears somewhere on each page.

Automated Office Procedures 012
Applying Payments

Launch Lytec and open your practice.

Adding a transaction code to allow for input of payments.

Go Lists → Transaction Codes

1. Click New
2. In the Transaction Code field, type **PIP**
3. In the Description field, type: **Primary Insurance Payment**
4. In the Type field, click the drop down arrow and choose "Insurance Payment"
5. Click Save.
6. Exit the Transaction Codes screen.

Adding insurance payment to patient's ledger.

Go Billing → Charges and Payments

1. Pull up patient in question.
2. In the billing field, choose appropriate billing number to apply insurance payment to. Consult the EOB (Explanation of Benefits) to determine correct billing dates.
3. Once your detail of billing has appeared on screen, press the "Insert" button on your keyboard. This will cause a new, blank detail line to appear. By default, it should have today's date in it.
4. Using your mouse, click in the "Code" field. Type in **PIP**.
5. Using your mouse, click in the "Amount" field. Consult the EOB of the patient in question. Locate the amount to apply and type it in the "Amount" field.
6. Click Save.
7. Click New and enter the next patient's chart name in the Patient Chart field.
8. Repeat the above sequence of steps to apply each patient's insurance payments as indicated on their respective EOBs.

Print a patient ledger and turn in. This will allow me (and you) to see that you have applied payment to your patients.

Go Reports → Patient → Patient Ledger.
1. I'll make this easy, since we only have four patients in our system, and I need to look at the activity on all of them, just go ahead and click "print." Make sure your name appears somewhere on the ledger. Please turn in to me or drop in my faculty mailbox, *J. Gayler*. Thanks.

Blue Cross Blue Shield
of South Carolina

Check Number 00874251
State Health Plan

Your Name, D.C.
Your Address
In Your Town, State Zip

Patient Information

Account #	BCBS ID #	Name	Physician Number or EIN	Date of Service	Pro. Code	Charge Submitted	Amount Allowed	Deductible	Other	Payment
DOEJ	255123488	Doe John	DC's id #	01072005	72100	72.00	67.00	.00	13.40	53.60
			DC's id #	01072005	72170	55.00	48.00	.00	9.60	38.40
			DC's id #	01072005	98941	38.00	34.00	.00	6.80	27.20
				Claim Total		165.00	149.00	.00	29.80	119.20
DOEJ	255123488	Doe John	DC's id #	01122005	98941	38.00	34.00	.00	6.80	27.20
				Claim Total		38.00	34.00	.00	6.80	27.20
DOEJ	255123488	Doe John	DC's id #	01142005	98941	38.00	34.00	.00	6.80	27.20
				Claim Total		38.00	34.00	.00	6.80	27.20
						241.00	217.00	.00	43.40	173.60

Blue Cross Blue Shield

000874251

Date: 02/10/2005

Pay To The Order Of: Your Name, D.C.

Amount: 173.60

One hundred seventy-three and 60/100

Signature O'President

Automated Office Procedure 012
Lytec Tasks Project

This assignment deals with Lytec features you may wish to employ in your office. The Help feature in Lytec will provide you with how to accomplish these tasks.

1. Create a **new patient** of your choice (you can use yourself, if you like). Let's say that for whatever reason, this is a cash paying patient and you just happen to be keeping him/her in your Lytec database. Since it's a cash pt., no insurance info will be added.

2. Create a **hold code** for your patient. You pick the "reason" (missing info, need correct address, missing birth-date, etc.).

3. Go to **Billing/Charges & Payments** and bill a few dates of service for your new patient. Use whatever code(s) you deem appropriate. Click Save, but do not print. Don't close this screen yet.

4. Print out a "**statement**" for the above patient. Go Print → Statement, and select the statement of your choice. You may preview it before you print.

5. Print a **list of all your patients**. Go Reports → Lists → Patients.

6. Appointment Scheduler. Go Activities Menu → Schedule Appointments. Enter several patient appointments and **print the schedule.**

Turn in all printed materials. You may drop them in my mailbox in the faculty mailroom. My mailbox is labeled "J. Gayler."