



COMPLETE PATIENT RECORDS

Definitive Homecare Solutions

One-Click User Guide

1.877.277.4876

www.cprplus.com

Definitive Homecare Solutions

6665 Busch Blvd.

Columbus, OH 43229

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For a complete list of **CPR+** documentation, please refer to the software's F1 Help.

Definitive Homecare Solutions
6665 Busch Blvd.
Columbus, Ohio 43229

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PRINTING NOTE FOR TWO-SIDED DOCUMENTS:

This document is designed for two-sided printing. If you are printing the PDF version of this document on a printer that only supports one-sided printing, some blank pages will appear in the final print job. This is normal for two-sided documents and no information is missing with your printed version. For additional printed manuals, please contact D.H.S.

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TABLE OF CONTENTS

| | | |
|------------------|---|-----------|
| CHAPTER 1 | ONE-CLICK! ORDER ENTRY / DELIVERY TICKET CREATION..... | 9 |
| | CREATING DELIVERY TICKETS | 10 |
| | <i>New HME/Supply Orders</i> | 12 |
| | THE HME / SUPPLY ORDER WINDOW | 13 |
| | DRUG ORDERS | 14 |
| | <i>Rx's on the Delivery Ticket</i> | 17 |
| | <i>Delivery Ticket Items: Right-click & Other Functions</i> | 18 |
| | USING SUPPLY KIT TEMPLATES | 18 |
| | <i>Supply Kit Template Setup</i> | 19 |
| | <i>Associating a Supply Kit Template with an Inventory Item</i> | 20 |
| | <i>Pre-Invoice Review</i> | 20 |
| | <i>Transferring to the Delivery Ticket Confirmation File</i> | 21 |
| | CREATING AN EXCHANGE TICKET | 21 |
| | CREATING PICKUP TICKETS. | 23 |
| | | |
| CHAPTER 2 | ONE-CLICK! READY –TO-BILL & ONE-CLICK BILLING..... | 25 |
| | CONFIRMING DELIVERY TICKETS | 26 |
| | <i>Filtering Delivery Tickets</i> | 26 |
| | <i>DT Confirmation File Functions</i> | 27 |
| | <i>Splitting Delivery Tickets Automatically</i> | 27 |
| | <i>Like Information</i> | 28 |
| | READY-TO-BILL ORDERS | 29 |
| | <i>Filtering RTB Orders</i> | 29 |
| | <i>Ready-To-Bill Orders & Invoice Creation</i> | 30 |
| | INDIVIDUAL INVOICE CREATION..... | 30 |
| | <i>Invoice Batch Creation</i> | 32 |





How to Use this Document

This document is designed to provide you with information that is easy to understand and quickly accessible. However, there are several items to keep in mind when reading and using this document.

| Items to Look For: | Description |
|--|--|
| Button Names and Keyboard Shortcuts / Commands | <p>All buttons mentioned in this document have an associated keyboard shortcut. These shortcuts appear in parenthesis next to the button name and appear in bold (identical to the onscreen counterpart).</p> <p>For example: Click the Select (Enter) button.</p> <p>You can either click the button with the mouse or press the key mentioned in parenthesis.</p> |
| Keyboard Commands | <p>There may be instances when you need to press a key that does not have an associated button. These keys appear between brackets (<>) and are bold.</p> <p>For example: Press the <F10> key.</p> |

| Items to Look For: | Description |
|---------------------------|--|
| Field Names | <p>If the sentence mentions entering information in a field, the field name is italicized and in a contrasting font.</p> <p>For example: Enter the last name of the Patient in the <i>Last Name</i> field.</p> <p>The only time this is not true is if the field is followed by a definition. Then the field name is bolded and preceded by a bullet.</p> |
| Typing Data in a Field | <p>If the sentence mentions entering specific data in a field, the data appears in a different font compared to a field name.</p> <p>For example: Type <code>Yes</code> in the <i>Question</i> field.</p> |
| Specific Screen Action | <p>If an action occurs after doing something within the application, it is described in italics within parenthesis.</p> <p>For example: Click the Next button. (<i>The Ready to Install screen appears.</i>)</p> |
| Popup Windows | <p>Many fields within CPR+ have an associated drop-down arrow icon. This icon displays a popup window of related data that can be selected and entered into the identified field.</p> <p>When this option is available, you will see the following text: "Use the associated popup window to..."</p> <p>When you see this text, you can access this popup window in two ways:</p> <ul style="list-style-type: none"> • Click the drop-down arrow icon or • Press the <F10> key while the cursor is in that field. <p>It is important to use these popup windows for consistent data entry throughout the program.</p> |
| Series of Steps / Actions | <p>There are times when a series of steps or actions (usually two or more) are needed to accomplish a task or open a window. These steps are identified by bolded text and the use of the "greater than" symbol (>).</p> <p>For example: Go to File > Info to view the CPR+ Technical and Setup Information screen.</p> |

In addition to the above information, there are several note related icons used in this document.

| Icon | Explanation |
|---|--|
|  | This icon represents a relevant note regarding the information being discussed. |
|  | This icon represents an important note that relates to required knowledge for a particular task. |
|  | This icon represents information that can save you time during a particular task. |
|  | This icon represents a warning regarding information that must be understood before continuing. |

Chapter 1

One-Click! Order Entry / Delivery Ticket Creation

The Order Entry -> Delivery Ticket generation -> Billing process has been streamlined to reduce user input and increase efficiency from intake to reimbursement. The Order is the logical place to store all the necessary information about the services being provided: What is ordered? When was it ordered? Who ordered it?

The intake staff enters much of this information in the order—the same information that is needed down the road when processing the Delivery Ticket and managing reimbursement. Now, by linking each Delivery Ticket item to its parent order, and by linking the creation of the order with the Delivery Ticket, we can pool relevant information and minimize the need for further data entry throughout the patient management process. Enter the Order/Delivery Ticket and the rest is just *a few clicks away*.

At the end of this course, the user will be able to:

- Create Working Delivery Tickets
- Understand Order Creation on the Delivery Ticket
- Assign orders to all Items on a Ticket
- Edit Orders and Delivery Ticket Items
- Create and manage Supply Kit Templates
- Add equipment exchanges to a Delivery Ticket

- Create Pickup Tickets for completion of therapy.

Creating Delivery Tickets

Creating Delivery Tickets is an important task in managing patient care through CPR+. The user can either start a new ticket or select a working ticket that can be used as a template for future deliveries.

Each patient has a list of Working Delivery tickets accessible from the **Delivery Tickets** button on the Patient screen.

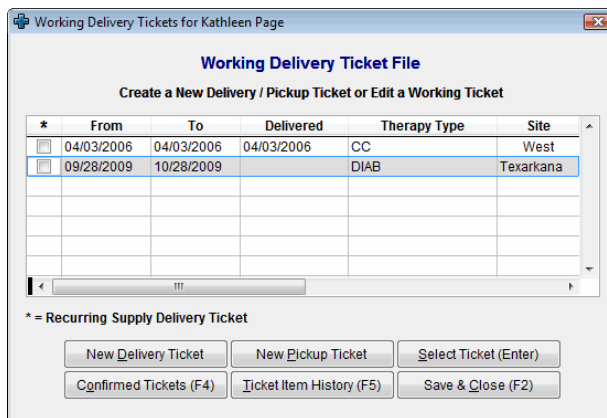


If a patient has no working tickets, a prompt to create a new Delivery Ticket appears when the user clicks **Delivery Tickets**. Click Yes to start a new Delivery Ticket.

The Working Delivery Ticket list displays:

- A checkbox to indicate if the ticket contains recurring supplies
- From and To fields for the last service dates
- A Delivered date
- Therapy Type(s)--There may be more than one order on a ticket and each order may have a different therapy type. If more than one therapy type exists, CPR+ displays them with slashes: "DIAB/Retail" for example.
- Site—Only visible for those with the Central Pharmacy module.

Figure 1-1)
Working Delivery
Ticket Window



The user can select **New Delivery Ticket**, **New Pickup Ticket** or **Select Ticket** to build from an existing therapy.

Delivery Instructions/Service Dates

The first tab of the ticket shows previous dates for the last delivery: the *From* and *To* service dates and the previous *Delivered On* Date (see the red box in the figure below). Enter the new service dates for the continuing therapy. The Service Dates should be an accurate reflection of the period of service being provided on the ticket. This means that if a three-month supply is being provided the dates should span three months.

Figure 1-2)
Service Dates on a
Working Delivery
Ticket

The screenshot shows a software window titled "Create Delivery Ticket for Laura Powers". It has several tabs: "Delivery Instructions / Service Dates", "Delivery Ticket Items", "Shipping Information", and "Pre-Invoice Review". The "Service Dates" tab is selected. It contains a table with two columns: "Current" and "Previous". The rows are "From", "To", and "Delivered On". The "Current" column has dropdown menus with dates: "01/08/2010", "01/15/2010", and "01/08/2010". The "Previous" column has empty dropdown menus. A red box highlights the "Previous" column. Below the table is a "Company" dropdown menu, which is circled in red. Below the company field is the text "Selected company prints on the Delivery Ticket". To the left of the "Service Dates" section is a "Delivery Instructions" text area with the text "No sign at street. House is half mile north of the corner." Below that is a "Footer Statement" text area with a disclaimer. At the bottom of the window are several buttons: "Select Rx Drug (F8)", "Pickup / Exchg (Ctrl+F8)", "SK Templates (Shift+F10)", "Update Pricing (F5)", "Print (F7)", "Select Inventory Item (F9)", "Delete Item (Shift+F8)", "View Orders (F6)", "Processed By (Ctrl+F3)", and "Save & Close (F2)".

If the new dates overlap the previous dates-- or there appears to be a gap in service dates-- CPR+ pops up a warning to the user.



These message boxes are just warnings. There is not a hard stop in processing.

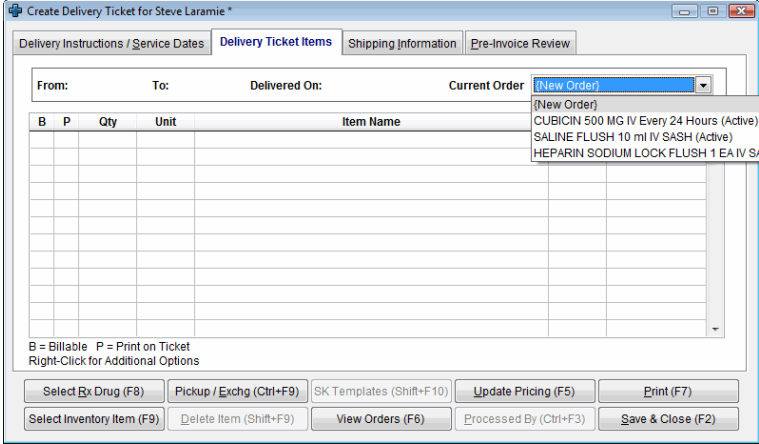
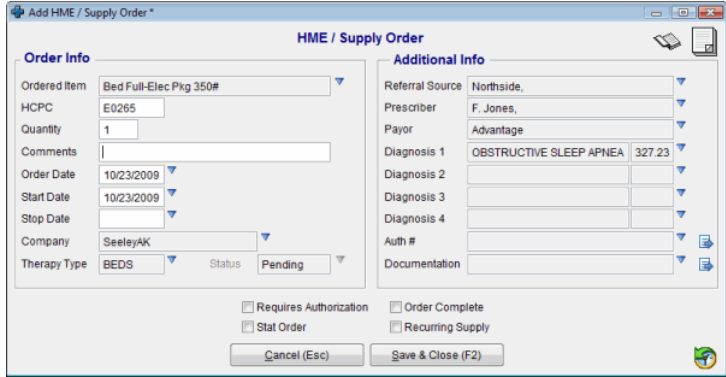
When the user begins the Delivery Ticket, an order may or may not have been entered depending on the therapy and line of business. With the **CPR+** one-click billing model, an order may now be created in conjunction with the Delivery Ticket to streamline the intake process.

Information entered into the order (payor, company, diagnoses, and therapy type) is now automatically transferred to the associated Delivery Ticket. Orders on the same ticket are kept together unless the payor, company, therapy type, or diagnoses differ.

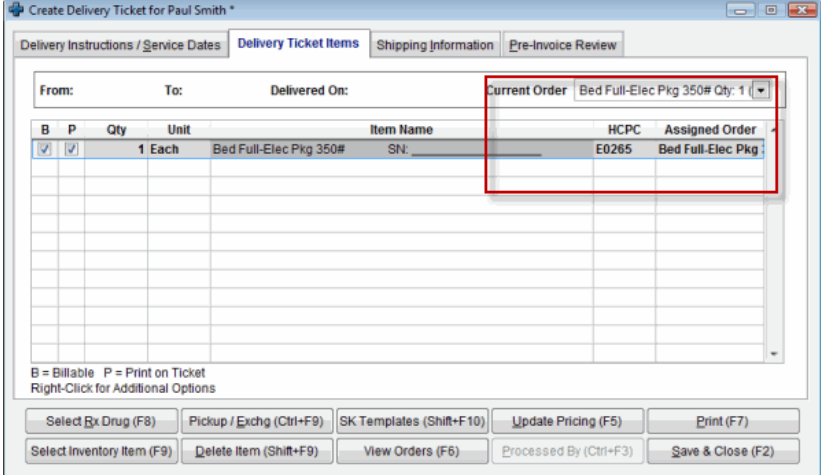
If this is a new Delivery Ticket, as in the example above, the Company field (see red oval in figure 9-2) will be blank until an Order is selected and items are entered onto the ticket. Once a primary order is tied to the ticket, the Company field will be populated. This information will also appear at the top of the printed Delivery Ticket.

New HME/Supply Orders

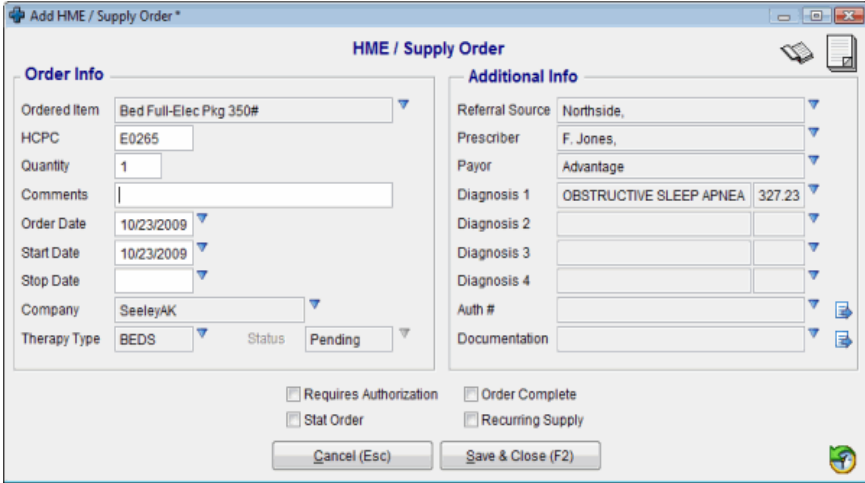
Instead of creating an order and then going to the Delivery Ticket, the user can immediately begin creating the Delivery Ticket. An order is created from the Delivery Ticket as follows:

| Step | Action |
|------|--|
| 1 | Enter the service dates and click the <i>Delivery Ticket Items</i> tab. |
| 2 | <p>If no order is assigned to the Delivery Ticket, a drop-down list of the patient's active and pending orders appears with "New Order" at the top of the list.</p>  |
| 3 | Select either an existing order or "New Order." This becomes the current order. |
| 4 | Select an Inventory Item (F9) and choose an equipment or supply item. This button is disabled until a current order is selected. Selecting "New order" also enables it. |
| 5 | <p>If this is a "New Order," the HME/Supply order form appears. Most of the information on the order is carried over from the patient demographic screen and the item setup. Note the addition of the <i>Referral Source</i> and the <i>four</i> diagnosis codes.</p>  |
| 6 | Edit any information needed for this order. Any information entered here carries forward through the billing process. Click the Save & Close (F2) button to save your work and close the order window. |

The HME / Supply Order Window

| Step | Action |
|------|---|
| 7 | <p>The Delivery Ticket Items screen now has this new order saved and associated with the Delivery Ticket item. The name of the new order appears in both the <i>Current Order</i> drop-down for the ticket and in the <i>Assigned Order</i> column for that line item.</p>  |
| 8 | <p>Add more items as needed. Each item added onto the Delivery Ticket defaults to the <i>Current Order</i>. At any time, the user can change the current order or choose "New order" from the <i>Current Order</i> drop-down again. Line items can be changed to the current order.</p> |

The HME / Supply Order Window



Below are the fields that are located on the HME / Supply Order window.

- *Ordered Item*: The selected item, description defaults from the item setup.
- *HCPC*: Defaults from the item setup.
- *Quantity*: Defaults to the number entered for the supply or for the serialized

equipment tagged.

- *Comments:* Enter free form comments.
- *Order Date:* Defaults to today's date.
- *Start Date:* Pulls the Start date from the Delivery Ticket (first tab).
- *Stop Date:* Defaults to blank.
- *Company:* Defaults to the patient's company in Patient Demographics.
- *Therapy Type:* Defaults from the item setup.
- *Status:* The order's status is pending until sent to the confirmation file—then it becomes Active. An order may also be DC'd (Discontinued).
- *Referral Source:* Defaults to the one entered in the Patient Demographic screen.
- *Prescriber:* Defaults to the patient's Primary Physician.
- *Payor:* Defaults from the Patient's Insurance setup. The payor may be changed by line item to another payor available for the patient.
- *Diagnoses:* There are four diagnosis codes that can be assigned to the order. Line items on the order can be changed to any diagnosis code that appears on its associated order.
- *Auth #:* The auth number provided by the payor if required.
- *Documentation:* Any documentation required by the payor (SMNs or CMNs).
- *Requires Authorization:* Indicates if authorization is needed.
- *Stat Order:* Marking it as a stat order moves it to the top of the Enterprise lists.
- *Order Complete:* Marking the order complete moves the item from the Complete Orders list to the next Enterprise list.
- *Recurring Supply:* Indicates that there are items that need to be delivered on a recurring basis.

Icons on the HME / Supply Order Window

The two icons in the upper right of the order provide a List of Changes to the order (small book), and a list of faxes attached to the order / patient (Large pages).

Drug Orders

Prescription orders are generally entered under the patient's Prescription menu and later loaded onto the Delivery Ticket. The Drug Order form has been revamped as well.

Figure 1-3)
Drug Order Window

Below are a list of fields located on the Drug Order window.

Order Info Section

- *Ordered Item:* The selected item, description defaults from the item setup.
- *Drug* - The Drug field should contain the medication, IV solution or nutritional product that is dispensed for this therapy.
- *Dose* - Enter the Dose for the drug being ordered. In addition, click the Dose Calculator icon to calculate the "CPR+ dose."
- *UOM* - Select the Unit of Measure (UOM) of this drug order. The default for this field is defined at the Inventory Item level.
- *Frequency* - Select the frequency for this drug order.
- *Infuse for* - Enter the duration or infusion time for the drug being ordered (e.g., 60 min., 90 min., IVP)
- *Route* - Select the route for this drug order. The default value for this field is defined at the inventory item level.
- *Pump* - Select the type of pump to be used with the drug order. This popup can be maintained from Databases (7) > Pop-up Windows (7) > select Type of Pump.
- *Comments:* Enter free form comments.
- *Order Date:* Defaults to today's date.
- *Start Date:* Pulls the Start date from the Delivery Ticket (first tab).
- *Stop Date:* Defaults to blank.
- *Discontinued:* The date a therapy/order was discontinued.
- *Therapy Type:* Defaults from the item setup.
- *Status:* The order's status is pending until sent to the confirmation file—then it becomes Active. An order may also be DC'd (Discontinued).

- *Company*: Defaults to the patient's company in Patient Demographics.

RX Info Section

- Order Type – This setting defaults from the item setup. Ancillary orders may then be associated with Primary orders.
- Rx Format - This indicates which format will be used when creating a prescription based on this order. This option is defined at the inventory level. See the HCPC / Additional Info section on adding a Drug to Inventory for more information.
- Associated Order- An ancillary drug/order may be associated with a primary order. If so, the ancillary order inherits the Therapy Type of the primary order and they remain on the same Delivery Ticket when confirmed providing payor, company, prescriber, and diagnoses are the same.
- Requires Authorization: Defaults from item/payor setup.
- Stat Order: Marking it as a stat order puts it to the top of the Enterprise list.
- Order Complete: Marking the order complete moves the item from the Order Entry/Completion list to the next Enterprise list.

Additional Info Section

- *Referral Source*: Defaults to one entered in the Patient Demographic screen.
- *Prescriber*: Defaults to the patient's Primary Physician.
- *Payor*: Defaults from the Patient's Insurance setup. The payor may be changed by line item to another payor available for the patient.
- *Per Diem*: A Per Diem fee may be selected and associated with this order. It will be billed on the associated Delivery Ticket.
- *Diagnoses*: There are four diagnosis codes that can be assigned to the order. Line items on the order can be changed to any diagnosis code that appears on its associated order.
- *Auth #*: If an authorization is available, associate it here—click the paper icon to edit the associated authorization.
- *Documentation*: Any supporting CMNs or SMNs needed. Click the paper icon to edit the attached document.
- *Recurring Supply*: Check if this order contains recurring supplies.

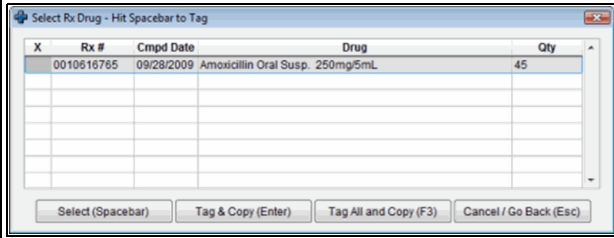
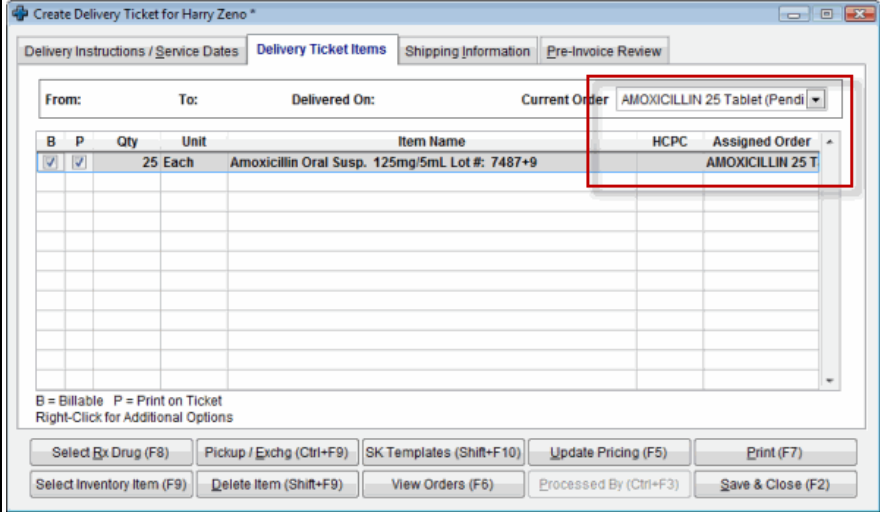
Icons located on the Drug Order Window

The two icons in the upper right of the order provide a List History of Changes to the order (small book), and a list of faxes attached to the order / patient (Large pages).

Drug Orders

Rx's on the Delivery Ticket

CPR+ creates an order before the RX is filled from the Prescription File. When the user creates the Delivery Ticket, the order is already there and active. This remains the same in the one-click module with a few minor changes as described below:

| Step | Action |
|------|--|
| 1 | Enter the service dates and click the <i>Delivery Ticket Items</i> tab. |
| 2 | If there are prescriptions ready to dispense, the Select RX Drug (F8) screen automatically appears. Click Tag and copy (Enter) to move the RX onto the ticket. |
| |  |
| 3 | If there are multiple RX's ready to dispense, the user can Tag All & Copy (F3) . This moves all Rx's onto the ticket and defaults the current order to the first primary drug. A message appears alerting the user to select the Current Order since there are multiple primary RX's to choose from. |
| 4 | Orders are already assigned to the item(s). The associated order appears in both the <i>Current Order</i> drop-down for the ticket and in the <i>Assigned Order</i> column for that line item. |
| |  |
| 5 | Add more items as needed. Each item added onto the Delivery Ticket defaults to the <i>Current Order</i> . At any time, the user can change the current order or choose "New order" from the <i>Current Order</i> drop-down again. Note: A drug may be added through F9 from here as well. If added this way, it is not deducted from inventory until the Delivery Ticket is confirmed. |

Delivery Ticket Items: Right-click & Other Functions

While in the *Delivery Ticket Items tab*, the user can perform a variety of functions. The following are actions available from the right-click menu:

- Assign Item(s) to Current Order: Assigns selected line(s) to the order showing as current from the drop-down. All line items can be changed at once (see note)
- Go to Patient Demographics: Brings up the patient's demographics screen
- Go to Inventory Items: Shows the item setup for selected lines
- View Assigned Order: Brings up the order assigned to the line item for viewing or editing
- View All Patient's Orders
- Delete Item(s)
- Add Modifier / Narrative to Item: Modifiers added here will override modifiers from the Special Price Matrix. Both the modifiers and narrative added here will appear on the claim. This function also available from the Pre-Invoice Review tab.



To select multiple lines in a row on which to perform a right-click action, hold the **<Shift>** key down, click on the first line, then click on the last line. To select multiple lines not in a row, hold the **<Ctrl>** key down and left click on each line.

Using Supply Kit Templates

The Supply Kit Template is one of the biggest time-saving tools in **CPR+** because it permits the user to pre-define items to be included on a Delivery Ticket. Multiple supply kits may be added to a Delivery Ticket. To add one to a Delivery Ticket:

| Step | Action |
|------|--|
| 1 | Click SK Templates (Shift+F10) in the Delivery Ticket Items tab. |
| 2 | Double-click on the template to select it. |
| 3 | If this SKT is set up to <i>Prompt on DT Import</i> , a grid with items chosen for that supply kit template appears. Select which of these items to actually import on a case by case basis. Enter in a quantity to bring an item into the ticket. |
| 4 | Press <Enter> or click Import (Enter) . |



Supply kit template cannot be imported on the Delivery Ticket until an order has been both created and assigned as the "Current Order." The SKT button is not enabled when "New Order" appears in the order list since the order has not been saved yet.

Supply Kit Template Setup

General recommendations for creating Supply Kit Templates for infusion customers:

- Create templates for supplies used with a particular infusion device (e.g. CADD Pump, Gemstar Pump).
- Create templates for the maintenance of the access point.
- Create templates for the specific drug, or drug class.

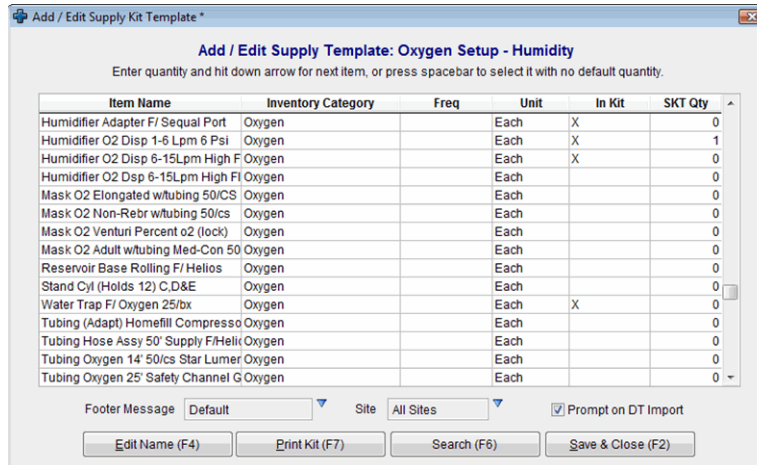
General Recommendations for creating Supply Kit Templates for HME customers:

- Create templates for equipment setup (enteral pump, oxygen).
- Create templates for brand-specific supplies (One Touch, Lifescan, Accucheck Glucometer).
- Create templates for specific lines of business (indwelling catheter, trach-care).

The Supply Kit Template setup process is a matter of selecting items and quantities appropriate to the type of template that is being created. Go to **Databases (7)>Templates (8) > Supply Kit/Delivery Ticket** to create or edit Supply Kit Templates.

| Step | Action |
|------|--|
| 1 | Highlight an existing SKT and click Select (Enter) or choose Add a New Entry (F10) . |
| 2 | Add the Template Name that is applicable to the services being provided. |
| 3 | In the grid, identify the appropriate items and use the spacebar to include them in the kit. Items may be selected with or without quantities. |
| 4 | When all items have been selected, select an appropriate Footer Message to include at the bottom of the Delivery Ticket. |
| 5 | Indicate from which site this SKT is accessible. All Sites may be selected or just one site. |
| 6 | Check the <i>Prompt on DT Import</i> box to allow the user to select which items from the SKT to import on each Delivery ticket. If left blank, all selected items are automatically imported. |
| 7 | Click the Save (F2) button to save your work and close the window |
| 8 | Repeat this process for each additional Supply Kit Template. |

Figure 1-4)
Supply Kit Template
Setup Screen

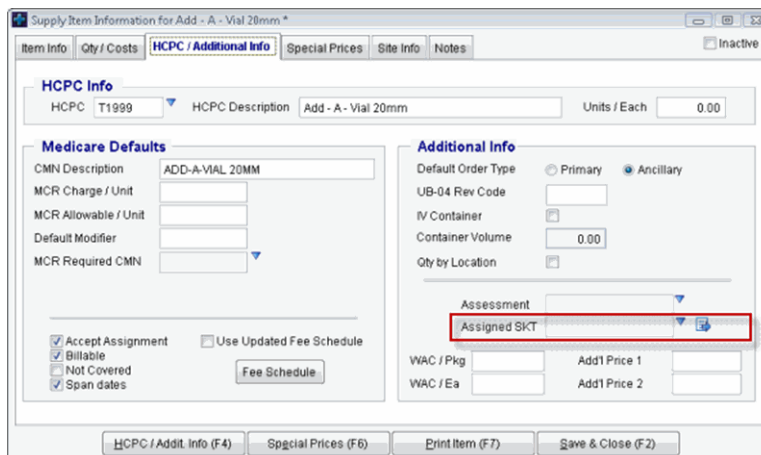


*Associating a
Supply Kit
Template with an
Inventory Item*

The user can associate a supply kit template with any inventory item: drug, supply, equipment or NIBI. There is now an "Assigned SKT" field in item setup.

When such an item is selected, CPR+ automatically brings the SKT into the Delivery Ticket items—or prompts the user on import if that setting has been chosen for the SKT. This field is located in the HCPC Additional tab under the Additional Info section.

Figure 1-5)
Item Setup-Assigned
Supply Kit Template



Pre-Invoice Review

The *Pre-Invoice Review* tab only shows items marked as billable in the *Delivery Ticket Items* tab unless the user checks the "Show Non-Billable Items" checkbox (see figure 9-6). From here, the user may:

- View Patient Responsibility Amount if this option is enabled
- Edit the payor, diagnosis and pricing per line item (right-click)
- View the Assigned Order, the payor setup, or inventory item setup (right-

Creating an Exchange Ticket

click)

- Enter/edit the Biller
- Update Pricing on all listed items (Update Pricing (F5))
- Add Modifier / Narrative to Item

Figure 1-6)
Pre-Invoice Review

| Qty | Item Name | HCPC | Payor | Dx | Bill / Ea. | Exp. Ea. | Cost / Ea. | Pt. / Ea. |
|-----|------------------------|-----------|--------------|-------|------------|----------|------------|-----------|
| 10 | Vancomycin 1gm | J3370 | Aetna (1500) | 263.0 | 93.66 | 8.02 | 0.99 | 0.00 |
| 1 | Catheter care (weekly) | A4221 | Aetna (1500) | 263.0 | 75.00 | 75.00 | 0.00 | 0.00 |
| 1 | IV Pole | SN: E0776 | Aetna (1500) | 263.0 | 0.00 | 0.00 | 0.00 | 0.00 |

*Transferring to
the Delivery
Ticket
Confirmation File*

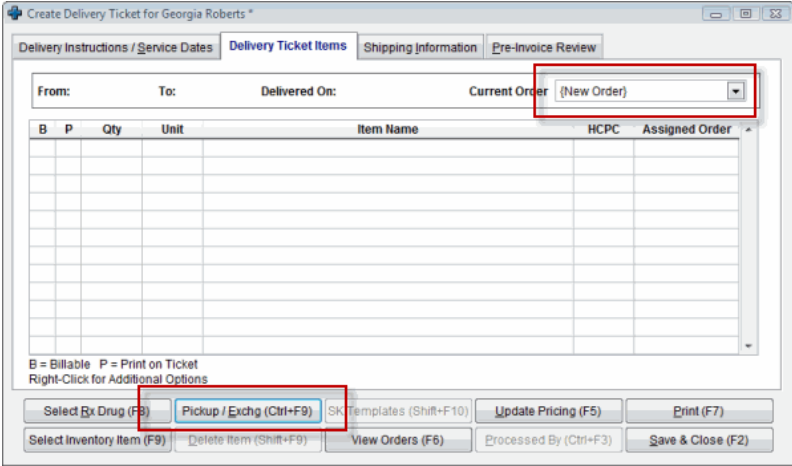
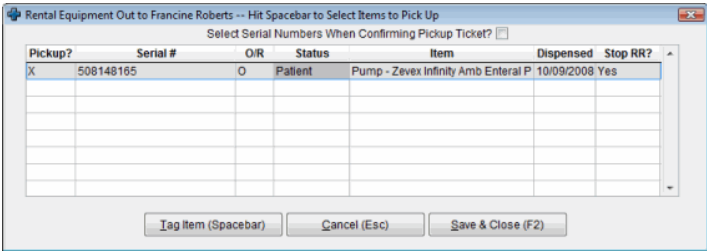
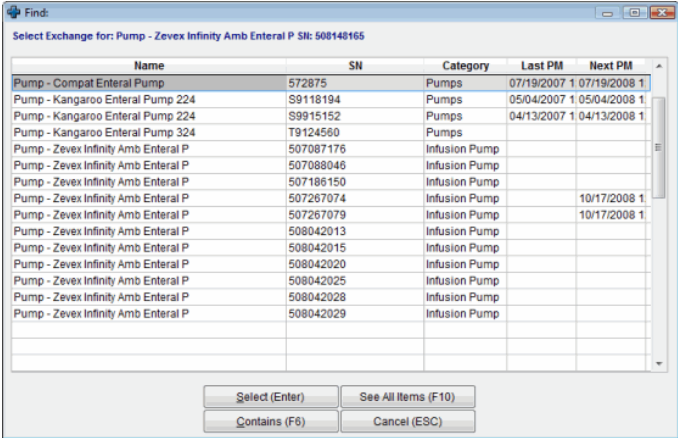
Once all of the items are pulled onto the Delivery Ticket, it is printed and transferred to the Delivery Ticket Confirmation File. This action gives the ticket a number and makes it complete. When a Delivery Ticket is in the Confirmation File, the user may still edit it (add items, change quantities, etcetera). The Confirmation File is designed to be a holding area for tickets needing proof of delivery.

A Delivery Ticket may be printed without being sent to the Confirmation File. In these cases, the ticket is not assigned a number and the word "Working" prints in the upper left-hand corner where the number would normally print.

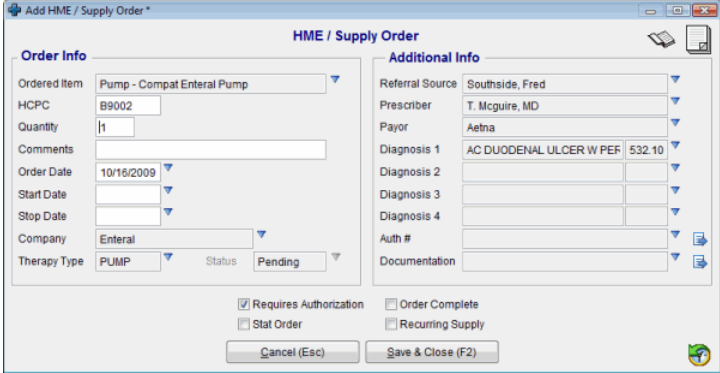
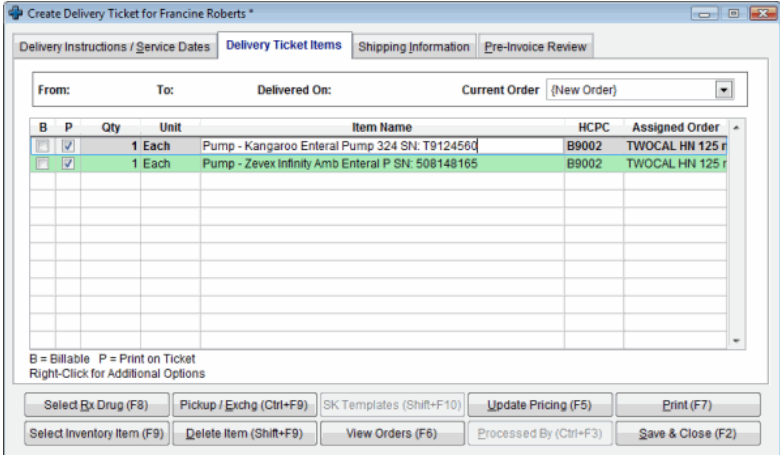
**Creating an
Exchange Ticket**

CPR+ allows the user to exchange a piece of equipment on a Delivery Ticket. The exchange process allows for an item on the Delivery Ticket to be returned to stock and another item of the same HCPC to be delivered instead.

| Step | Action |
|------|---|
| 1 | From the patient's Delivery Tickets screen, select New Delivery Ticket . |
| 2 | Enter the From, To and Delivered On dates. |
| 3 | Click the Delivery Ticket Items tab and choose a "Current Order" from the Current Order drop down menu—"New Order" or an existing HME/supply order. |

| Step | Action |
|-----------------|--|
| <p>4</p> | <p>Choose the Pickup / Exchg (Ctrl+F9) button. (This is not available until a current order is selected.)</p>  |
| <p>5</p> | <p>Select Exchange Item. A list of rental Equipment for the patient appears. Tag the item(s) and click Save & Close (F2).</p>  |
| <p>6</p> | <p>A list of items to pick for exchange appears. Highlight the item(s) to be exchanged. (This may be done without selecting a specific serial number. Check or uncheck the "Select a Serial Number at confirmation" box as needed.)</p>  |
| <p>7</p> | <p>Click Select (Enter).</p> |

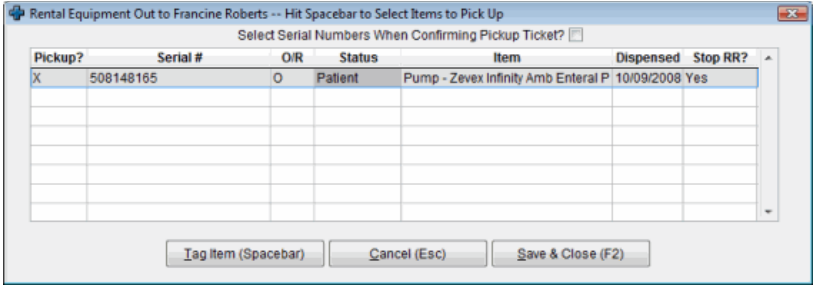
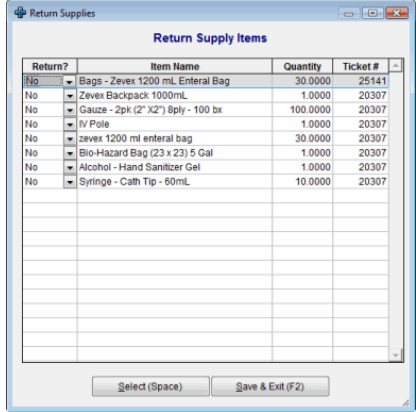
Creating Pickup Tickets

| Step | Action |
|------------------|--|
| <p>8</p> | <p>If a "New Order" was selected, the HME/Supply order screen appears. (All items must be attached to an order.) Make any changes desired and click Save & Close. Therapy Type is required.</p>  |
| <p>9</p> | <p>Both the item to deliver and the item to pickup now appear on the Delivery Ticket Items tab. These items are assigned to the current order automatically. The item to exchange is highlighted in green.</p>  |
| <p>10</p> | <p>Click the Print (F7) button to print the ticket and transfer it to the Confirmation File.</p> |

Creating Pickup Tickets

Creating a Pickup Ticket can be reserved for the end of service for a patient. The Pickup Ticket will return the items to Inventory with their Default Returned Status

assigned. CPR+ adds a Billing End Date to the Recurring Rental record when it is confirmed.

| Step | Action |
|------|--|
| 1 | From the Patient Menu select Delivery Tickets . |
| 2 | Click the New Pickup Ticket (F9) button. A list of rental equipment out to the patient appears.  |
| 3 | Click the Tag Item (Spacebar) button to select item(s). This may be done without selecting a specific serial number. Check or uncheck the <i>Select a Serial Number at confirmation</i> box as needed. |
| 4 | Click the Save & Close (F2) button when all items are selected. |
| 5 | Enter the Pickup Date. The Billing End Date defaults to the same date. |
| 6 | If supplies also need to be picked up, click the Pickup Ticket Items tab and then Select Inventory Item (F9) . A list of supplies out to the patient appears. Highlight and press the spacebar on the items to select them.  |
| 7 | Click the Print (F7) button to print the ticket. |
| 8 | Answer “Y” to transfer the ticket to the Confirmation File |

Chapter 2

One-Click! Ready –To-Bill & One-Click Billing

The delivery ticket and its associated order(s) are created and sent to the confirmation file. At this point, all the items on the Delivery ticket are linked to a completed order. The user may proceed to confirm and Batch Bill it with no further data entry.

At the end of this course, the user will be able to:

- Confirm Delivery Tickets
- Understand the options and logic in place to split tickets
- Create Batch Invoices
- Create/Review an individual invoice
- Gain an understanding of the relationship between orders/delivery tickets and billing.

Confirming Delivery Tickets

Once a delivery has been made and the ticked signed, the delivery ticket is ready to confirm. The delivery ticket can be confirmed from the **Delivery Ticket Confirmation Manager**. This is accessed through the *Managers* drop-down or **Things To Do (3)>Delivery Ticket Confirmation (2)**—or from the appropriate place in one of the three Enterprise Lists: IV, HME, or SpRx.

Figure 2-1)
Delivery Ticket
Confirmation File

| Tag | Last Name | First Name | DT # | From | Delivered | Rx Type | Ship Meth. | Driver | Ship Date | Payor |
|-----|-----------|------------|-------|------------|------------|----------|------------|--------|-----------|---------------------|
| | Wendell | Nancy | 25192 | 02/12/2009 | 02/12/2009 | Linemait | | | | ANTHEM |
| | Walls | Lenny | 25239 | 02/13/2009 | 02/13/2009 | Misc | | | | Texas Medicaid -PDF |
| | WALKER | JESSICA | 24282 | 01/21/2009 | 01/13/2009 | ATB | FedEx | | | Louisiana Medicaid |
| | WALKER | JESSICA | 23929 | 01/13/2009 | 01/12/2009 | ATB | FedEx | | | Louisiana Medicaid |
| | WALKER | JESSICA | 23188 | 12/23/2008 | 12/23/2008 | Linemait | FedEx | | | Louisiana Medicaid |
| | WALKER | JESSICA | 22768 | 12/17/2008 | 12/16/2008 | ATB | FedEx | | | Louisiana Medicaid |
| | WALKER | JESSICA | 22409 | 01/12/2009 | 12/04/2008 | ATB | Driver | | | Louisiana Medicaid |
| | Tucker | William | 25211 | 02/13/2009 | 02/13/2009 | ATB | | | | United Healthcare |
| | TREVIR | BOB | 25190 | 01/28/2009 | 01/28/2009 | HYDRA | FedEx | | | Texas Blue Cross BI |
| | Thompson | Michelle | 25196 | 02/13/2009 | 02/13/2009 | ATB | | | | Healthspring |

Filtering Delivery Tickets

The user can manually view and confirm each delivery ticket from here or can choose to batch confirm. Either way, sorting and filtering options may be helpful.

Unconfirmed Delivery Tickets can be sorted here by Date Range, Payor, Driver, Therapy, Shipping Method, or any combination of these fields. Click on these column names to sort by a column.

The delivery tickets may also be filtered to show only those meeting certain criteria. The following filter options appear at the top of the Delivery Ticket Confirmation File window:

- **Date From/To:** Creation date range.
- **Date Del:** Delivery Date range.
- **Ship Date:** Ship Date.
- **Payor:** Click the blue arrow and press the spacebar to tag one or more payors. Click Continue.
- **Driver:** The Driver list can also be sorted by one or multiple drivers in your system. Click on the **blue arrow** to the right of the *Driver* field to view a list of all employees designated in Employee Setup as a driver. Select one or multiple names pressing the **<Spacebar>**.
- **Therapy:** The Therapy Type button works in a similar manner. Use it to select one or multiple types of therapy provided to the patient.
- **Method:** The Method button refers to the Shipping Method for a delivery.

After entering criteria, click the **Apply Filter** button to apply your selection(s) to the list.

DT Confirmation File Functions

- Confirm a Delivery Ticket or a Pickup Ticket by clicking the **Confirm Ticket (Enter)** button or the **Batch Confirm (Alt+F5)** button. If the associated Insurance Company is set for auto-splitting a Delivery Ticket, this occurs when the ticket in the list is confirmed.
- Batch confirming: Tag each DT by pressing the spacebar (an X appears in the selected DT's Tag column). When all the DTS are tagged, click **Batch Confirm (Alt + F5)**.
- View or edit a Delivery or Pickup Ticket by clicking the **View Ticket (F3)** button. The user has the opportunity to change quantities, add /delete items, and even edit payors, and Diagnosis codes per line item here.



From the Delivery Ticket, the user can right-click on an item to view/edit the order as well. Select **View Assigned Order(s)** from the right-click menu.

- Locate a specific Delivery or Pickup Ticket by clicking the Find Ticket (F6) button. Enter a ticket number in the **Find Delivery Ticket** field and click the Search (F2) button. If the ticket is found, CPR+ will jump to that spot in the list and highlight the ticket. This feature can be used when there are many tickets waiting to be confirmed.
- Filter the list of tickets by collector by clicking the Biller/Collector (Alt+F8) button. From the list of billers, select one and click the Select (Enter) button. CPR+ filters the list and shows only those tickets waiting to be confirmed for the selected biller.
- Manually split items from a Delivery Ticket by clicking the Split Ticket (Ctrl+F8) button. (There is auto-splitting logic in place as well.)
- Delete a ticket by clicking the Delete (Shift+F9) button. The user is prompted to verify if the selected ticket is the one to delete. Click the Yes button will delete the ticket and remove it from the list.
- Print the Unconfirmed Delivery Tickets report by clicking the Print (F7) button.

Splitting Delivery Tickets Automatically

Delivery tickets are split at confirmation. Each payor can be set up to split the delivery ticket based on the following logic under the payor setup (Setup Option # 18):

- **Split each Rx Drug:** Each individual prescription is split and is added to its own ticket.
- **Split All Rx Drugs:** All Rx drugs remain together on one ticket but supplies are split onto another ticket.

- **Split Each Rx Ingredients:** Each ingredient in a compounded drug is split into its own ticket
- **Do Not Split Tickets:** Splitting does not occur based on RX/ingredient.

Figure 2-2)
Insurance Company
Setup: DT Splitting

CPR+ still adheres to those setup options per payor and by other standards. However, since we have more information carried along from the order entry/delivery ticket creation process, the Delivery Tickets are now split according to like information as well.

The splitting of tickets occurs according to the logic below:

- 1) Patient Responsibility: If Patient Responsibility is turned on (Program Options #21 /22), and the payor on the order does not cover the item, CPR+ will change the payor to a secondary or to the patient if there is no secondary payor. The new payor's pricing will be used for that line item.
- 2) Recurring Rentals
- 3) Pickup Items
- 4) "Split by order / like information"
- 5) Rx's based on the insurance company option
- 6) Content Billing

Like Information

Like information means that all of the following must be the same to remain on the same ticket:

- Payor
- Company

Ready-To-Bill Orders

- Prescriber
- Therapy Type --of the primary order if an ancillary order is linked to a primary order
- Diagnosis Code(s)

If items have the same payor, company, therapy type, prescriber, and diagnosis code(s), they remain on the same ticket. If any of these differ, the item(s) are split onto a new ticket. Remember that the item inherits much of this information from the associated order. There may be multiple orders created or pulled onto a single DT and therefore multiple orders associated with line items on the same DT.

Ready-To-Bill Orders

After a ticket is confirmed and possibly split, the next step is invoice creation from the Ready-To-Bill Orders Manager. This is accessed through the *Managers* drop-down menu, **Billing/Financial (5) > Ready-To-Bill Orders (3)** —or from the corresponding option in the Enterprise Lists. Invoices may be individually viewed/created or created in batches.

Figure 2-3)
Ready-To-Bill-Orders

| Status | Last Name | First Name | No. | From | To | Confirmed | Therapy Type | Payor |
|--------|-----------|------------|-------|------------|------------|------------|--------------|----------------------|
| Ready | White | Janet | 24970 | 02/07/2009 | 02/14/2009 | 02/09/2009 | PAIN | Miller County Hospic |
| Ready | WHATLEY | FRANK | 24955 | 02/07/2009 | 02/15/2009 | 02/09/2009 | ATB | Texas Blue Cross Bl |
| DEDU | WHATLEY | FRANK | 24559 | 01/31/2009 | 02/06/2009 | 01/30/2009 | ATB | Texas Blue Cross Bl |
| DEDU | WHATLEY | FRANK | 24318 | 01/26/2009 | 01/30/2009 | 01/21/2009 | ATB | Texas Blue Cross Bl |
| DEDU | WHATLEY | FRANK | 24134 | 01/19/2009 | 01/25/2009 | 01/19/2009 | ATB | Texas Blue Cross Bl |
| DEDU | WHATLEY | FRANK | 23819 | 01/09/2009 | 01/18/2009 | 01/09/2009 | ATB | Texas Blue Cross Bl |
| DEDU | WHATLEY | FRANK | 23561 | 12/30/2008 | 01/08/2009 | 01/08/2009 | ATB | Texas Blue Cross Bl |
| DEDU | WHATLEY | FRANK | 23364 | 12/30/2008 | 01/08/2009 | 12/31/2008 | ATB | Texas Blue Cross Bl |
| Ready | Wesley | Sara | 24566 | 01/30/2009 | 02/01/2009 | 02/03/2009 | Steroid | UNITED HEALTHCAI |

Filtering RTB Orders

This manager supports sorting by: Status, Patient, DT No., Dates, Therapy Type, and Payor. Click on a column name to sort by a column. Like the Delivery Ticket Confirmation Manager, the user can filter by selected criteria as well:

- **Date From (From/To):** Refers to the Date in the "From" field on the DT.
- **Date To (From/To):** Refers to the "To" field on the DT.
- **Confirmed:** Confirmed date of the DT.
- **Payor:** Click the blue arrow and press the spacebar to tag one or more payors. Click Continue.

- **Status:** Delivery Ticket Status: Hold, Auth, Ready, or a user-defined status. Select one or multiple by tagging with the spacebar and clicking **Continue (F2)**.
- **Therapy:** This filter option allows the user to filter on the Therapy Type designated on the Delivery Ticket.
- **Biller:** Select one or multiple Billers. Click on the blue drop down arrow to the right of the Biller field to view a list of all employees designated in Employee Setup as a Biller. Select one or multiple names using the spacebar to tag or un-tag choices.

After entering criteria, click the **Apply Filter** button to apply your selection(s) to the list.

Ready-To-Bill Orders & Invoice Creation

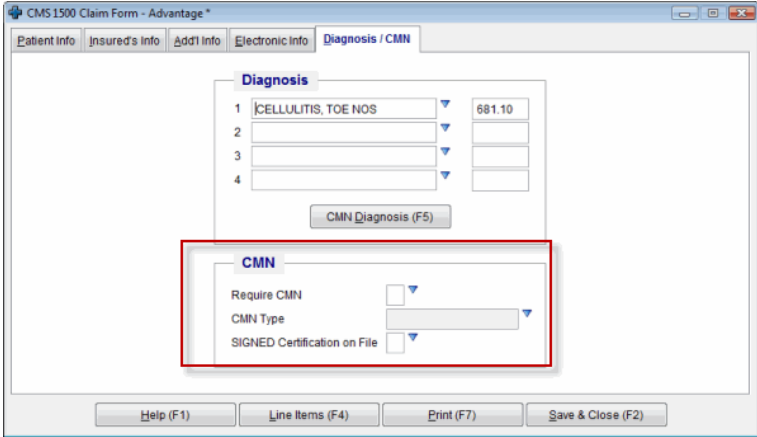
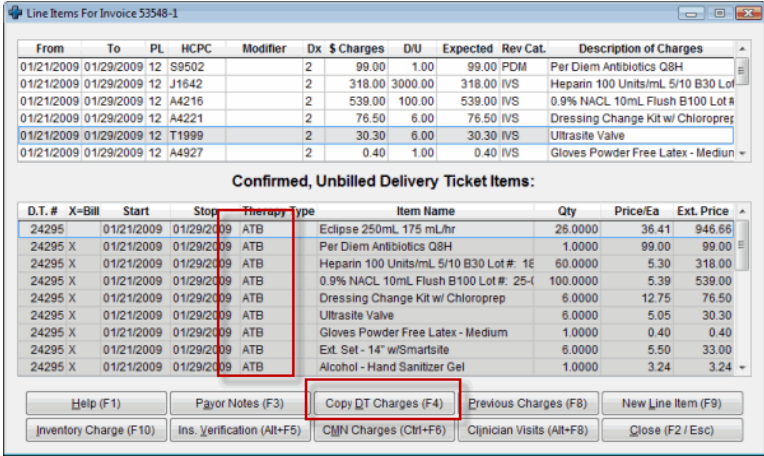
Here is where the effects of One-Click become clear. Because the DT is linked to an order, **CPR+** already knows the information needed to complete the billing process. ***There is no more prompting for the company and the payor!***

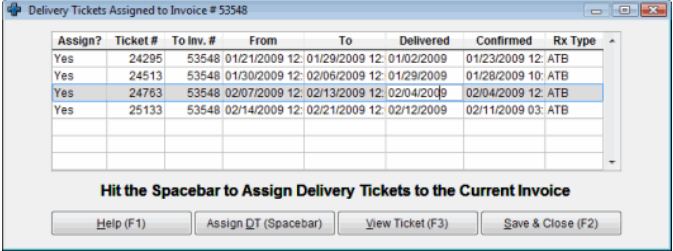
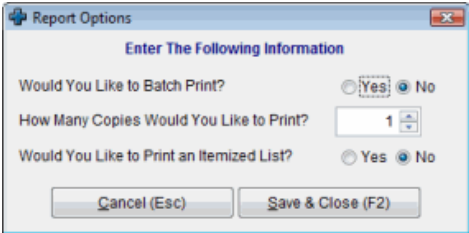
Individual Invoice Creation

Below are the steps to create an individual invoice in the One-Click world:

| Step | Action |
|------|---|
| 1 | Click on the selected invoice in the Ready-To-Bill Orders manager. |
| 2 | Click Create Invoice (F9) . When billing a non-Medicare payor on a patient who has an active Medicare payor, CPR+ prompts the user to bill Medicare for denial. Select Yes to bill Medicare or NO to bill the original payor. |
| 3 | The invoice appears immediately without prompts for the company or payor. The type of invoice is determined by the invoice type assigned to the payor. |

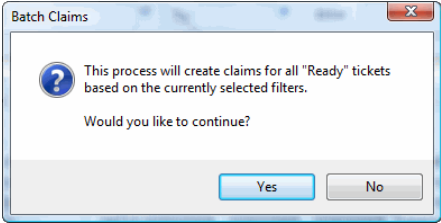
Individual Invoice Creation

| Step | Action |
|-----------------|---|
| <p>4</p> | <p>Review/edit information on all the tabs if desired. The CMN information has been added to the Diagnosis tab.</p>  |
| <p>5</p> | <p>Click Line Items (F4) to add lines to the invoice. All confirmed, unbilled delivery ticket items <i>that match any filters applied to the RTB Manager</i> appear. For example, if the therapy type ATB is applied as a filter, only ATB items appear.</p>  |
| <p>6</p> | <p>All billable items copy automatically to the invoice (top grid). If necessary, additional items may be added from Inventory charges, Insurance Verification, CMN charges, Clinician Visits and/or from Previous Charges.</p> |

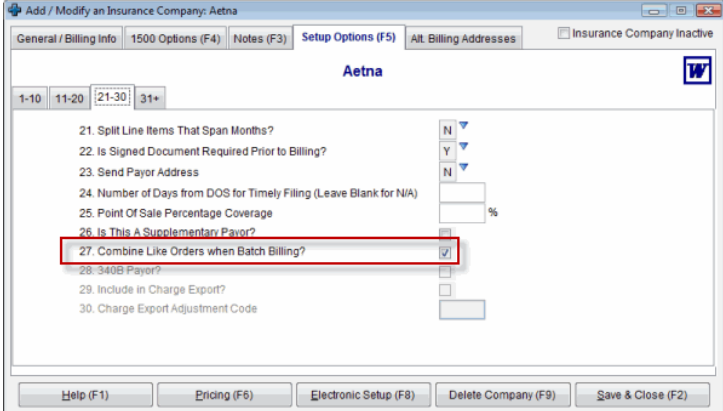
| Step | Action |
|-----------------|---|
| <p>7</p> | <p>Click Close (F2/Esc). A list of Delivery tickets for the patient appears. Any delivery ticket that had line items copied default to a status of assigned ("Yes" in the <i>Assign?</i> column). Use the spacebar to unassigning a DT. Click Save & Close (F2) to continue.</p>  |
| <p>8</p> | <p>Print (F7) the Invoice and change the default printing options as necessary (batch print, # of copies, itemized list). Click Save & Close (F2).</p>  |

Invoice Batch Creation

A simpler more efficient way of creating invoices is through the batch billing process. The user can create an invoice batch based on any filter applied to the Ready-To-Bill Orders Manager. Then the user is truly a few clicks away from completing the entire billing process without entering in any additional information.

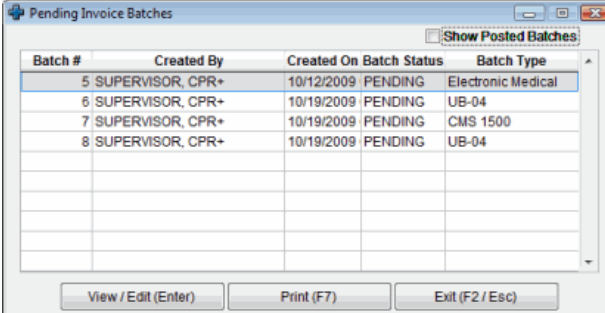
| Step | Action |
|-----------------|---|
| <p>1</p> | <p>Apply any filters as needed. Be sure to click Apply filter after all choices are entered.</p> |
| <p>2</p> | <p>Click Create Invoice Batch (F8). A confirmation message appears.</p>  |

Individual Invoice Creation

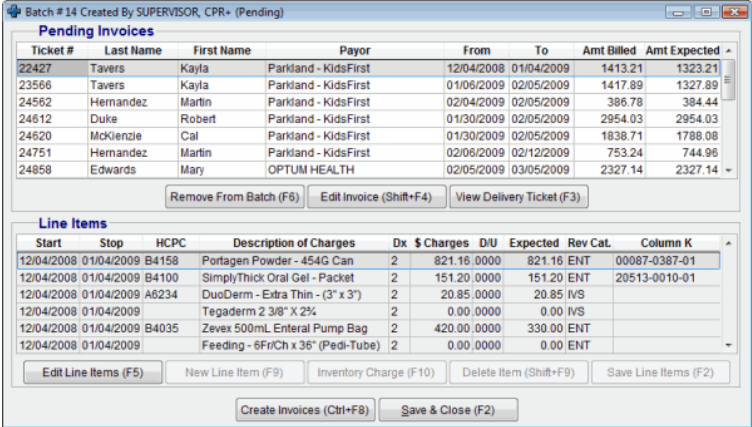
| Step | Action |
|------|--|
| 3 | Click Yes to create invoices in the current list that have a status of "Ready." |
| 4 | <p>The invoice batch or batches are created based on invoice type. If the payor is set up to "Combine Like Orders when Batch Billing," orders may be combined. The payor, company, therapy type, prescriber and diagnosis code(s) must be the same to be considered "like."</p>  |

The user can access the invoice batches by clicking the hyperlink just below the "Ready-To-Bill" Delivery Tickets window's title bar or from **Billing/Financial (5)>Batch Processes (2)> Process Batch Invoices (4)**. This displays the Pending Invoices batch window where the user can print batches.

Figure 2-4)
Pending Invoice Batches



| Batch # | Created By | Created On | Batch Status | Batch Type |
|---------|------------------|------------|--------------|--------------------|
| 5 | SUPERVISOR, CPR+ | 10/12/2009 | PENDING | Electronic Medical |
| 6 | SUPERVISOR, CPR+ | 10/19/2009 | PENDING | UB-04 |
| 7 | SUPERVISOR, CPR+ | 10/19/2009 | PENDING | CMS 1500 |
| 8 | SUPERVISOR, CPR+ | 10/19/2009 | PENDING | UB-04 |

| Step | Action |
|-----------------|--|
| <p>1</p> | <p>Highlight a batch and click View/Enter. All pending items in the batch are displayed. As a pending invoice is highlighted in the top of the grids, line items for that invoice are displayed below in the Line Items grid.</p>  |
| <p>2</p> | <p>The user can remove a pending invoice from the batch, edit the pending invoice, view the ticket, and edit line items before creating the actual invoices.</p> |
| <p>3</p> | <p>Click Create Invoices (Ctrl + F8) to generate the invoices.</p> |