


**SHARED MEDICAL SYSTEMS (SMS)**

Merry Yee  
(415) 353-9262  
Merry.yee@ucsfmedctr.org



Learning Services

UCSF Medical Center Learning Services' Mission is to provide knowledge, skills, guidance, motivation and learning resources in support of UCSF Medical Center's mission, vision and values.

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**Introductions**



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**Class Guidelines**

- The length of the class, the number of breaks, and the length of lunch depend upon the number of students



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### Class Guidelines



PLEASE DO NOT TURN ON YOUR COMPUTER AT THIS TIME

**NO INTERNET!**

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### Class Guidelines

- Drinks with lids are permitted



YES! NO!

- Beepers and cells phones turned off or set on vibrate

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### Objectives

- At the end of this training session, you will be able to:
  - Define Patient Accounting terms
  - Know the IDX/SMS system flows
  - Navigate SMS screens
  - Locate patient accounts in SMS
  - Respond to patient and insurance company billing inquires

*continued...*

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### Objectives

- At the end of this training session, you will be able to:
  - Post payments and adjustments
  - Post comments
  - Perform other duties related to outstanding patient accounts



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### Overview

- What we will cover
  - Introduction
  - Terms and Definitions
  - Navigating through SMS
  - SMS system walk-through
  - Locating accounts in SMS

*continued...*



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### Overview

- What we will cover
  - SMS Inquiry:
    - Detail Summary
    - Select Account Detail
    - Account Detail
  - Managing Patient Accounts
  - Responding to Patient and Insurance Company inquiries
  - Generating a Demand Bill or a Detailed Patient Statement



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### Terminology

- **IDX** – Software used by UCSF that allows you to perform the following functions:
  - Schedule patient appointments
  - Pre-Admit/Register patients
  - Assign Providers/Physician to Inpatient/Outpatient visits/stays
  - Attach insurance plans to patient visits
  - Manage Professional Fee (Pro-Fee) accounts receivable, post charges and payments



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### Terminology

- **Transaction Editing System (TES)** – An application within IDX that captures and evaluates Transaction data.
  - TES allows you to:
    - Enter charges (Transactions) into Billing and Accounts Receivable (BAR)
    - Correct errors (Edits)



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### Terminology

- **Shared Medical Systems (SMS)** – a billing system that performs the following:
  - Manage Hospital (Tech) Fees, including:
    - Posting charges
    - Correcting/transferring existing charges
    - Posting payments

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### Terminology

- **Shared Medical Systems (SMS)** – a billing system that performs the following:
  - Post adjustments/corrections to patient accounts
  - Respond to patient inquiries
  - Generate a Demand Bill or Detailed Patient Statement
  - Transfer hospital accounts to "Bad Debts"



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### Terminology

- **Charge Description Master File (CDM)** – An SMS database that stores the following information:
  - Service Code descriptions (Procedure Codes)
  - Prices
  - UB Revenue Codes
  - Payment Codes
  - Adjustment Codes



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### Terminology

- **The Insurance Master File (IMF)** – A database containing a nationwide listing of insurance companies
  - Stores the following insurance company information:
    - Names
    - Addresses
    - Telephone numbers
    - Authorization requirements



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### Terminology

- The Insurance Master File (IMF)
- The IMF database is used to select insurance plan codes for specific Inpatient or Outpatient visits.



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### Terminology

- Claims/Charges
  - Professional Fee (Pro-Fee)
  - Hospital Fee (Tech Fee)



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### Terminology

- Professional Fee (Pro-Fee)
  - The professional component (fee) for a procedure that represents a physician's work



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### Terminology

- Professional Fee (Pro-Fee)
  - A 1500 form is used to bill:
    - Office visits
    - Hospital visits
    - Consultations
    - A Radiologist's services (reading/interpreting an x-ray)



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### Terminology

- Hospital Fee (Tech Fee)
  - The charges submitted by the facility that represent services provided within each department of the facility.



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### Terminology

- Hospital Fee (Tech Fee)
  - A UB40 form is used to bill:
    - EKGs
    - Radiology Technician services
    - Phlebotomist services
    - The cost of exam rooms



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**Terminology**

- **Explanation of Benefits (EOB)**
  - A statement sent to the patient and provider advising of:
    - Services provided
    - Charges billed and considered
    - Contracted amount/negotiated rate
    - Patient liability (if any)

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**Terminology**

- **Explanation of Benefits (EOB) – continued**
  - A statement sent to the patient and provider advising of:
    - The amount paid by the insurance company (even if the insurance does not pay, an EOB is sent)



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**Terminology**

- **Bill Date**
  - The date the system generates (produces) a bill
- **Bill Date Types**
  - Outpatient
  - Inpatient



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### Terminology

- **Outpatient**
  - In SMS the bill usually "drops" (is sent out) on the 9th day following the day the charges were entered into the system
  - By the 10th day, any corrections or changes must be made only in IDX

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### Terminology

- **Inpatient**
  - In SMS the bill usually "drops" (is sent out) on the 5th day following the day the charges were entered into the system
  - By the 6th day, any corrections or changes must be made in both IDX and SMS



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### Terminology

- **User Mail Date**
  - This is the date that the bill is actually sent to the insurance company or medical group



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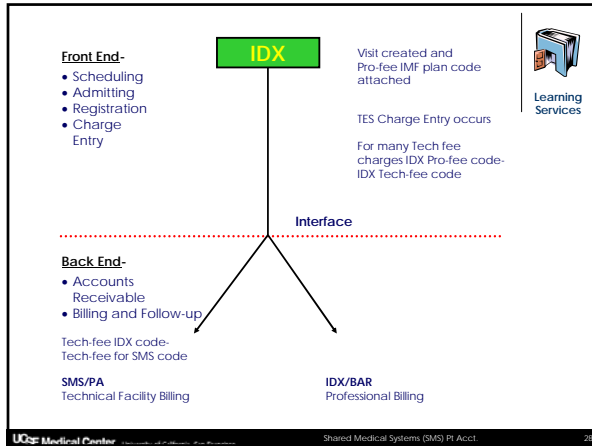
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**Policy**

- When a patient receives scheduled or unscheduled services at UCSF, Patient Financial Services (PFS):
  - Processes SMS technical and hospital based patient charges
  - Responds to patient and insurance company billing inquires
  - Posts payments and adjustments

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**Policy**

- When a patient receives scheduled or unscheduled services at UCSF, Patient Financial Services (PFS):
  - Posts comments
  - Perform other duties related to outstanding patient accounts

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### SMS Inquiries or Questions?



- Contact [Patient Financial Services](#)
  - Customer Service – 673-1113
  - Urgent Only – 353-3754

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