

**SHARED  
MEDICAL  
SYSTEMS  
(SMS)**

**VIEW**



## Table of Contents

<b>SMS PATIENT ACCOUNTING.....</b>	<b>1</b>
INTRODUCTION.....	1
Description.....	1
Policy.....	1
<b>TERMS AND DEFINITIONS.....</b>	<b>2</b>
IDX.....	2
Transaction Editing System (TES).....	2
Shared Medical Systems (SMS).....	2
Charge Description Master File (CDM).....	2
Insurance Master File (IMF).....	3
Claims/Charges.....	3
Explanation of Benefits (EOB).....	3
Bill Date.....	4
User Mail Date.....	4
Cirius.....	4
<b>NAVIGATING SMS.....</b>	<b>5</b>
<b>KEYBOARD MAP SET-UP.....</b>	<b>6</b>
<b>SYSTEM WALK-THROUGH.....</b>	<b>7</b>
Overview.....	7
Objectives.....	7
Logon Screens.....	7
Logging Off.....	7
INITIAL SCREENS.....	8
<b>LOCATING ACCOUNTS IN SMS.....</b>	<b>13</b>
INITIAL SCREENS.....	13
PATIENT ACCOUNT TYPE CODES.....	14
<b>SMS INQUIRY FROM THE PATIENT INQUIRY OVERVIEW SCREEN.....</b>	<b>15</b>
VIEWING ACCOUNT DETAILS USING FUNCTION KEYS.....	15
ADDITIONAL FUNCTION KEYS.....	15

## Table of Contents

<b>MANAGING PATIENT ACCOUNTS .....</b>	<b>16</b>
PATIENT PAYMENT ARRANGEMENTS .....	16
<i>Setting up a Patient Installment Contract.....</i>	<i>17</i>
<i>SMS Statement Code Definitions .....</i>	<i>17</i>
PF5 – VIEW BALANCES .....	18
PF6 – ACCOUNT DETAIL SELECTION .....	19
PF7 – ACCOUNT DETAIL DATA .....	21
<b>WHEN YOU NEED HELP .....</b>	<b>22</b>
<b>INDEX .....</b>	<b>23</b>

# SMS Patient Accounting

## Introduction

**Description** This course is designed to provide a basic overview of the SMS application. It was designed specifically for Accounts Receivable staff that need a basic overview of SMS. The training consists of the following:

- Introduction
- Terms and Definitions
- Navigating through SMS
- System Walk-Through
- Locating Accounts in SMS
- SMS Inquiry, including:
  - Detail Summary (PF 5)
  - Select Account Detail (PF 6)
  - Account Detail (PF 7)
- Managing Patient Accounts
- Responding to Patient and Insurance Company inquiries
- Generating a Demand Bill or a Detailed Patient Statement

**Policy** When patients receive scheduled or unscheduled services at UCSF, the Patient Financial Services:

- Processes SMS technical and hospital based patient charges
- Responds to patient and insurance company billing inquiries
- Posts payments and adjustments
- Posts comments
- Perform other duties related to outstanding patient accounts

## Terms and Definitions

Listed below are common system and accounting terms used throughout this document.

<b>Term</b>	<b>Definition</b>
<b>IDX</b>	<p>A software program used by UCSF that allows users to perform the following functions:</p> <ul style="list-style-type: none"> <li>➤ Schedule patient appointments</li> <li>➤ Pre-Admit/Register patients</li> <li>➤ Assign Providers/Physician to inpatient/outpatient visits/stays</li> <li>➤ Link Referrals/Authorizations to patient visits</li> <li>➤ Attach insurance plans to patient visits</li> <li>➤ Manage Professional fee (Pro Fee) accounts receivable, post charges and payments</li> </ul>
<b>Transaction Editing System (TES)</b>	<p>An application within IDX that captures and evaluates Transaction data. TES allows:</p> <ul style="list-style-type: none"> <li>➤ Enter charges (Transactions) into Billing and Accounts Receivable (BAR)</li> <li>➤ Correction of errors (Edits)</li> </ul>
<b>Shared Medical Systems (SMS)</b>	<p>A billing system that allows UCSF to:</p> <ul style="list-style-type: none"> <li>➤ Manage Hospital Fees (Tech Fees) including: <ul style="list-style-type: none"> <li>▪ Posting charges</li> <li>▪ Correcting/transferring existing charges</li> <li>▪ Posting payments</li> </ul> </li> <li>➤ Post adjustments/corrections to patient accounts</li> <li>➤ Respond to patient inquiries</li> <li>➤ Generate a Demand Bill or Detailed Patient Statement</li> <li>➤ Transfer hospital accounts to “Bad Debts”</li> </ul>
<b>Charge Description Master File (CDM)</b>	<p>A SMS database that stores:</p> <ul style="list-style-type: none"> <li>➤ Service Code descriptions (also called procedure codes)</li> <li>➤ Price</li> <li>➤ UB Revenue Codes</li> <li>➤ Payment Codes</li> </ul> <p>Adjustment Codes</p>

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## Terms and Definitions

Term	Definition
<b>Insurance Master File (IMF)</b>	A database that contains a nationwide listing of insurance company's names, addresses, telephone numbers, and authorization requirements. The IMF database is used to select insurance plan codes for specific inpatient or outpatient visits:
<b>Claims/Charges</b>	<p><b>Professional Fee (Pro Fee)</b> – The professional component (fee) for a procedure that represents physician's work A <b>HCFA 1500</b> form is used to bill:</p> <ul style="list-style-type: none"> <li>➤ Office visits</li> <li>➤ Hospital visits</li> <li>➤ Consultations</li> <li>➤ Radiologist (reading the x-ray/film)</li> </ul> <p><b>Hospital (Tech Fee)</b> – Charges submitted by the facility that represent services provided within each department of facility A <b>UB92 form</b> is used to bill:</p> <ul style="list-style-type: none"> <li>➤ EKG/ECG</li> <li>➤ Radiology Technician services</li> <li>➤ Phlebotomist</li> <li>➤ Exam Rooms</li> </ul>
<b>Explanation of Benefits (EOB)</b>	<p>A statement sent by the insurance company to the patient and service provider advising of:</p> <ul style="list-style-type: none"> <li>➤ Services provided</li> <li>➤ Charges billed and considered</li> <li>➤ Contracted amount and negotiated rate</li> <li>➤ Patient liability (if any)</li> <li>➤ Amount paid the insurance company (if any)</li> </ul>

Continued on next page

## Terms and Definitions

Term	Definition
<b>Bill Date</b>	The date the system generates or produces a bill <b><u>Outpatient-</u></b> In SMS the bill usually “drops” (is sent out) on the <b>9<sup>th</sup> day</b> from the day the charges were entered into the system By the 10 <sup>th</sup> day, any corrections or changes must be made only in IDX <b><u>Inpatient-</u></b> In SMS the bill usually “drops” (is sent out) on the <b>5<sup>th</sup> day</b> from the day the charges were entered into the system By the 6 <sup>th</sup> day, any corrections or changes must be made in both the IDX and SMS systems
<b>User Mail Date</b>	This is the <b><u>date that the bill is actually sent</u></b> to the insurance company or medical group
<b>Cirius</b>	A database used to store all the UB92 claim forms

## Navigating SMS

In order to...	Do this...
<b>Advance</b> to the next field	Press the <b>TAB</b> key Or Use the <b>ARROW</b> keys to move the cursor
<b>Back up</b> to the previous field	Press a <b>SHIFT</b> key along with the <b>TAB</b> key Or Use the <b>ARROW</b> keys to move the cursor
<b>Clear the screen</b> of: <ul style="list-style-type: none"> <li>➤ Error messages</li> <li>➤ Keyboard Lock Error</li> <li>➤ Line 24 Error messages</li> </ul>	Press the <b>ESCAPE (ECS)</b> key Or Press the <b>PAUSE /BREAK</b> key Or <b>Shift F10</b>
Abandon an account <b>without saving changes</b>	Press the <b>SCROLL LOCK</b> key
<b>Clear an entire field</b> of existing data	Position the cursor at the first character of the field, press the <b>END</b> key
<b>Clear part of a field</b> of existing data  <b>IMPORTANT:</b> <b>DO NOT</b> press the space bar to clear data from a field	Position the cursor at the first character to be deleted, press the <b>END</b> key to clear the following characters
<b>Revise</b> a data field	Position the cursor at the first character of the field, enter the revised information
<b>Print</b> a screen	Press the <b>PRINT SCREEN KEY</b> Click the <b>PRINT SCREEN ICON</b> Select <b>"FILE"</b> from the drop-down menu and select the <b>"PRINT SCREEN" OPTION</b>
Access a <b>HELP</b> screen	Position the cursor at the first character of the field where you need help, press the <b>PF24</b> key ( <b>SHIFT + F12</b> )
Obtain <b>General Information</b> on line	Press the <b>PF 18</b> key  <b>NOTE:</b> The PF 18 –Education option is not available on all screens
<b>Select an option</b> from a menu	As appropriate, perform one of the following: Press the desired <b>PF</b> key Or <b>Key in the option</b> number, press the <b>&lt;Enter&gt;</b> key Or Use a <b>mouse</b> to click on the option
<b>Save work</b> before proceeding	Instructions for saving your work in SMS vary. Always refer to your SMS screens for instructions

## Keyboard Map Set-up

The table below illustrates the Keyboard Map Set-up

PF13	PF14	PF15	PF16	PF17	PF18	PF19	PF20	PF21	PF22	PF23	PF24
PF1	PF2	PF3	PF4	PF5	PF6	PF7	PF8	PF9	PF10	PF11	PF12
F1	F2	F3	F4	F5	F6	F7	F8	F9	F10	F11	F12

**Note:**


The “PF” and “F” keys are the same keys

The Function Keys include F1 through F12. To access keys F13 through F24 press the **Shift Key**

**Example:**

To access F18, press the **Shift Key** and **F6 ( 6 + 12 = 18 )**

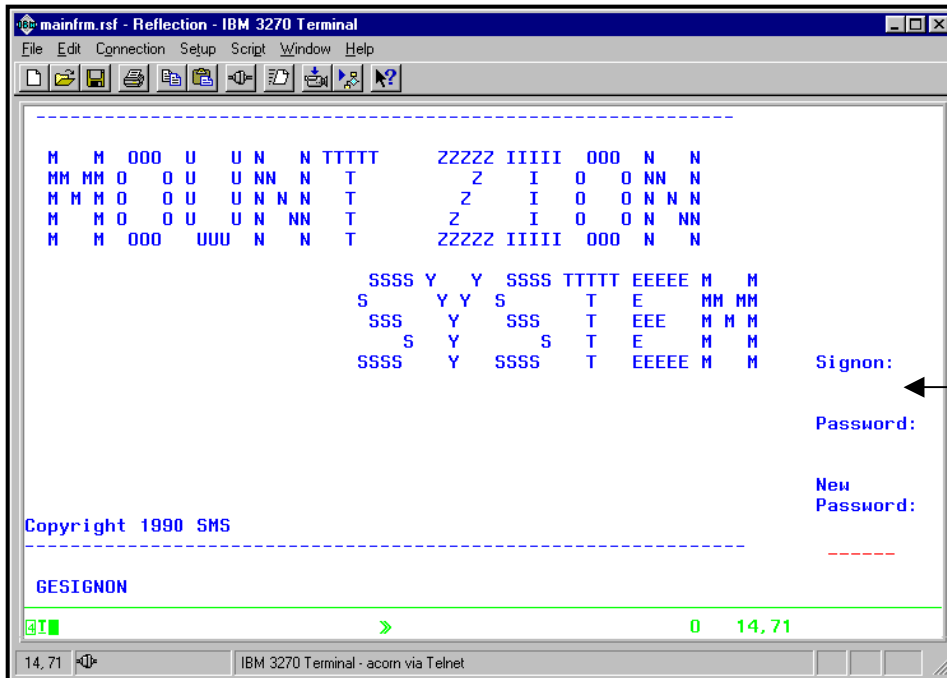
## System Walk-Through

- Overview** This section demonstrates how to log on and sign into SMS. The information Technology (IT) group provides logon access.
- Objectives** At the end of this section, the participants will be able to:
- Log on to the SMS system
  - Log off of the SMS system
  - Use the F or PF function keys
  - Look up patients
  - Determine Account Selection Criteria
- Logon Screens** You desktop support group provides an SMS icon for the Patient Accounting system. Double click the System icon to access SMS. The SMS system contains four logon screens that must be completed.
- IMPORTANT NOTE #1:**
- It is imperative that you maintain patient confidentiality by protecting your password. To ensure that your password is not used by an other employee, you must do the following:
- **ALWAYS** log off when you are not using your computer
  - **NEVER** share your password with other staff members
  - **DO NOT** use a password that can be easily guessed by your co-workers
-  **PROTECTING PATIENT CONFIDENTIALITY IS EVERYONE'S RESPONSIBILITY**
- IMPORTANT NOTE #2:**
- The IT Department monitors users access to SMS and IDX
- Logging Off** It is important that you logoff the SMS system correctly. Follow the steps listed below when logging off the SMS system:
- From the **Collector Workstation** screen, select PF14 until the **“General Master Menu”** screen appears
- Select PF11
- On the “LOG OFF” screen, select “X” on the top right corner of your screen
- Or
- Select the “File” drop-down menu, choose “Exit”

## Logging On

### Initial Screens

1. Enter your user name and password, press <Enter>



#### **Note #1:**

SMS is not case sensitive. You can use either upper or lower case letters in the SMS system. SMS automatically converts lower case letters to upper case letters when you press <Enter>. The IDX system requires all entries to be in upper case. Because you will be toggling between the two systems, it easier to set you "Caps Lock" to the on position.

#### **Note #2:**

In the training environment all the passwords are the same. Using duplicate sign-on names logs out of the SMS system.

A SMS logon is permanent. If you need to change your password, please contact your supervisor.

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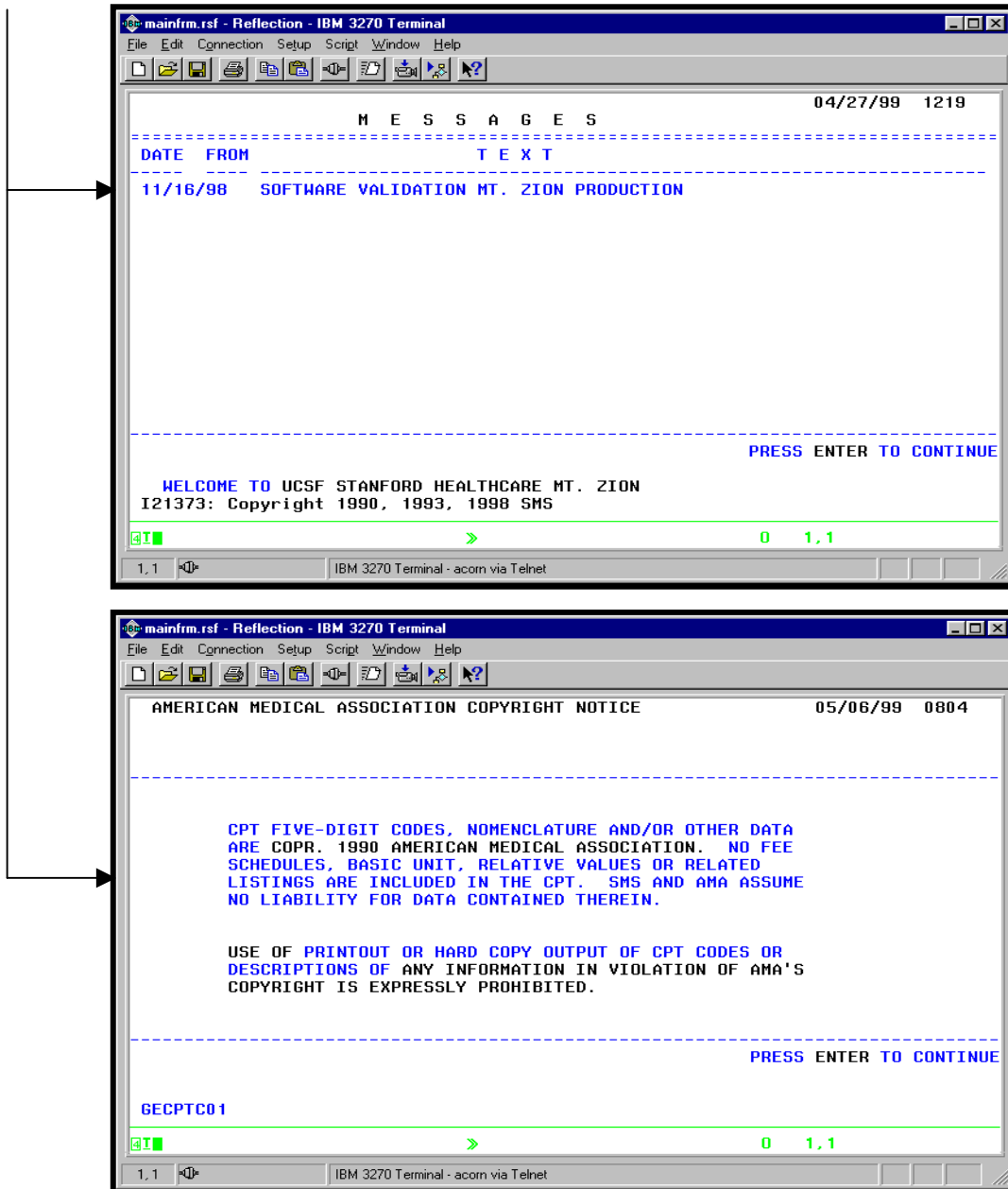
## Logging On

### Initial Screens

2. Enter your user name and password, press <Enter>.

**Note:**

IT provides system messages for users signing into SMS. Please read these messages.

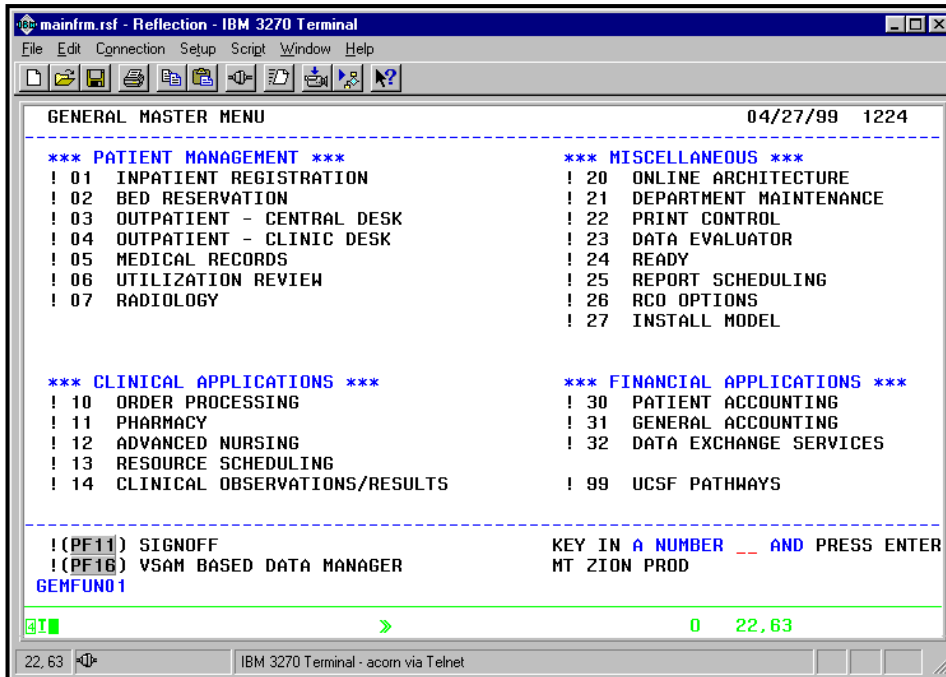


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## Logging On

### Initial Screens

- At the “Key In A Number” prompt (right hand bottom of the screen), type **30** to access the Patient Account function.



```
mainfrm.rsf - Reflection - IBM 3270 Terminal
File Edit Connection Setup Script Window Help
GENERAL MASTER MENU                                04/27/99 1224
-----
*** PATIENT MANAGEMENT ***                        *** MISCELLANEOUS ***
! 01 INPATIENT REGISTRATION                       ! 20 ONLINE ARCHITECTURE
! 02 BED RESERVATION                              ! 21 DEPARTMENT MAINTENANCE
! 03 OUTPATIENT - CENTRAL DESK                    ! 22 PRINT CONTROL
! 04 OUTPATIENT - CLINIC DESK                    ! 23 DATA EVALUATOR
! 05 MEDICAL RECORDS                             ! 24 READY
! 06 UTILIZATION REVIEW                          ! 25 REPORT SCHEDULING
! 07 RADIOLOGY                                   ! 26 RCO OPTIONS
                                                ! 27 INSTALL MODEL

*** CLINICAL APPLICATIONS ***                    *** FINANCIAL APPLICATIONS ***
! 10 ORDER PROCESSING                            ! 30 PATIENT ACCOUNTING
! 11 PHARMACY                                    ! 31 GENERAL ACCOUNTING
! 12 ADVANCED NURSING                           ! 32 DATA EXCHANGE SERVICES
! 13 RESOURCE SCHEDULING                        ! 99 UCSF PATHWAYS
! 14 CLINICAL OBSERVATIONS/RESULTS

!(PF11) SIGNOFF                                  KEY IN A NUMBER -- AND PRESS ENTER
!(PF16) VSAH BASED DATA MANAGER                 MT ZION PROD
GEMFUN01

22,63 0 22,63
IBM 3270 Terminal - acorn via Telnet
```

Key In A  
Number  
Prompt



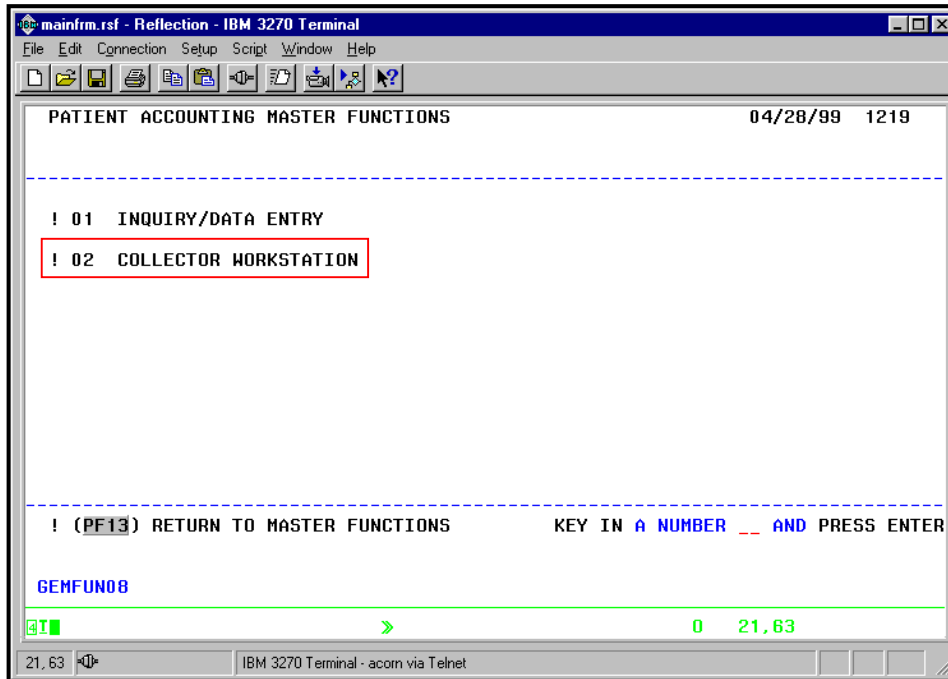
Be sure your “Num Lock” key is in the “ON” position.  
You cannot enter numbers in the SMS system if your “Num Lock” key is not selected.

Continued on next page

## Logging On

### Initial Screens

4. At the “Key In A Number” prompt (right hand bottom of the screen), type **02** to access the Collector Workstation function.



**Note:**

This screen provides two options:

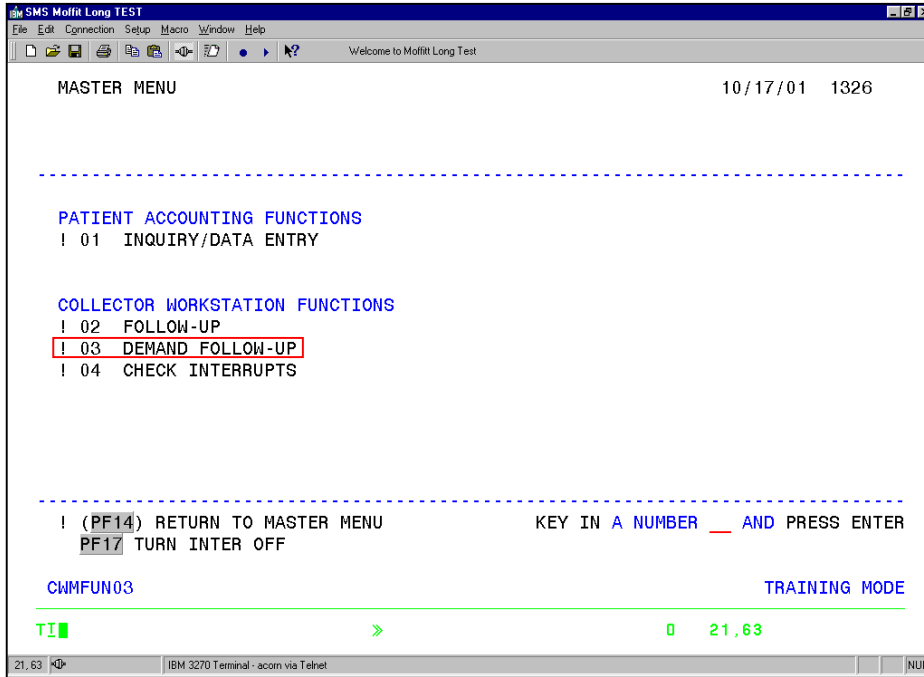
- **01 Inquiry/Data Entry**  
This option is used to access the Patient Inquiry (PTIQ) screens only
- **02 Collector Workstation**  
This option is used to access a SMS generated file of your assigned accounts (Work List)

Continued on next page

## Logging On

### Initial Screens

5. At the “Key In A Number” prompt (right hand bottom of the screen), type **01** to access the Inquiry/Data Entry function.



The system displays the Account Selector screen. The Account Selector screen is discussed on the next page.

# Locating Accounts in SMS

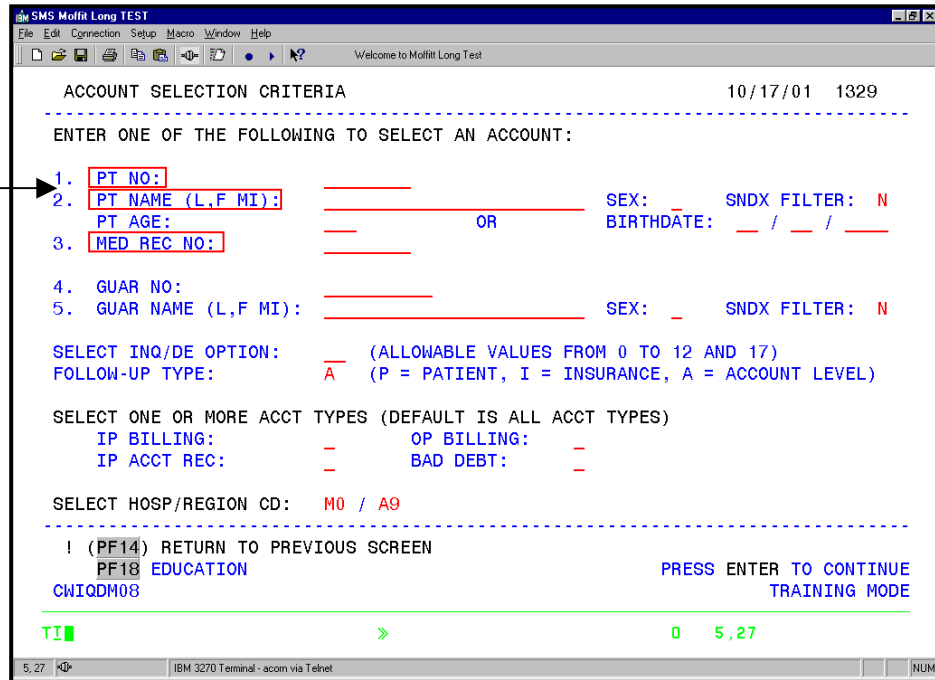
## Initial Screens

If you know the...	Enter...	Example
Account Number/Patient Number	Patient's specific account number	10000317
Medical Record Number	Patient's medical record number	10000117
Patient's Name	Last name, First name, Middle initial (no spaces between names) <b>AND</b> Patient's sex ( M or F )	Jones,MaryJ  <b>F</b> (for Female)
Guarantor Number	Case number from IDX or Mother's account's number for a newborn with Medi-Cal	System assigned through IDX interface

**Account/Patient Number**

**Patient Name**

**Medical Record Number**



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## Patient Overview Screen

The Patient Overview screen is the starting point for all patient account inquiries in SMS. The SMS system divides the screen into three sections described below:

Header	Body	Footer
Patient Number Patient Name Medical Record Number Account Type Admission/Registration Date Discharge Date (Inpatient) Financial Class (FC) Account Balance	Birth Date Sex/Martial Status Social Security Number (SSN) Guarantor Number Guarantor Last Name Hospital Service Effective Date Pre-Admit Statement/Number of Units Patient Rep/District Code Patient Payor Plan Patient Phone Number Account Balance Amount Expected from Insurance Company Amount Expected from Patient	Branching Options: <ul style="list-style-type: none"> <li>▪ Demo Data</li> <li>▪ Financial Data</li> <li>▪ Insurance Data</li> <li>▪ Contract Data</li> <li>▪ Detail Summary</li> <li>▪ Select Account Detail</li> <li>▪ Post Comments</li> <li>▪ Post Cash Accounts</li> </ul> System Messages, Including: <ul style="list-style-type: none"> <li>▪ E = Error Message</li> <li>▪ I = Informational Message</li> <li>▪ W = Warning Message</li> </ul>

## Patient Account Type Codes

Code	Definition
I	Not Final Billed = Patient
A	Inpatient = Final Billed
O	Outpatient
B	Bad Debt

The screenshot shows the 'SMS Moffitt Long TEST' window displaying a patient overview for patient 318. The screen is divided into three sections as indicated by callouts on the left:

- HEADER SECTION:** Contains patient identification and service information: PATIENT OVERVIEW 318 SVC FAC: M0A9 02/13/02 1318. It lists WORKLIST ID: 1050, PT NO: 318 GARCIA, RAQUEL, MR NO: 90001701, ACCT TYPE: A, REG: 05/25/01, DSCH: 07/18/01, FC: H, PT: Q, EXP IND: ACCT BAL: 97707.04.
- BODY SECTION:** Contains demographic and financial details: BIRTHDATE: 09/03/1973, HOSP SVC/EFFECTIVE DATE: SPX \_\_ / \_\_ / \_\_, SEX/MARITAL: F S, PREADMIT STS/NO OF UNITS: /, SOC SEC NO: 572613382, PATIENT REP/ DISTRICT CD: \_\_ / 49, GUAR NUMBER: GA LN: GARCIA, FN: RAQUEL, MI: PHONE USE: PRN CNTRY CD: AREA CD: 707 PHONE: 7949908 EXT: PHONE USE: CNTRY CD: AREA CD: PHONE: EXT: ACCT BAL 821 V PT BAL 97707.04 97707.04 .00.
- FOOTER SECTION:** Contains a menu of options: (PF1) DEMO DATA, (PF2) FIN DATA, (PF3) INS DATA, (PF4) CTRCT DATA, (PF5) DTL SUMMARY, (PF6) SEL ACCT DTL, (PF7) ACCT DTL, (PF10) POST COMMENTS, (PF11) POST CASH ACCT, (PF15) DEMAND BILL, PF16 D/E, PF17 NAD. It also includes (PF14) RETURN TO COLL WKST, PAQRSP02, and the instruction PRESS ENTER TO COMPLETE TRAINING MODE.

## SMS Inquiry from the Patient Inquiry Overview Screen

### Viewing Account Details using Function Keys

PF5 – Detail Summary	PF6 – Select Account Detail	PF7 – Account Detail
Shows standard patient bill/line item charges, including: <ul style="list-style-type: none"> <li>▪ Payments</li> <li>▪ Adjustments</li> <li>▪ Charges</li> </ul>	Allows you to select specific account information, including: <ul style="list-style-type: none"> <li>▪ Charges</li> <li>▪ Transfers</li> <li>▪ Payments</li> <li>▪ Adjustments</li> <li>▪ Comments</li> </ul>	Shows all account entries, including: <ul style="list-style-type: none"> <li>▪ Charges</li> <li>▪ Payments</li> <li>▪ Account Changes</li> <li>▪ Comments</li> </ul>

### Additional Function Keys

Function Key	Describes	Details Include...
PF1	Demographic data	Date of Birth Address Attending Physician
PF2	Patient Financial Data	Guarantor Name Guarantor Phone Number Billing Related Data Bad Debt Data Balances for each Insurance Patient Balance
PF3	Insurance Data	Number of Insurances Payor Plan Code Co-ordination of Benefits (COB) – Payor Priority Authorization Numbers Last Pay Date/Amount Total Payments Current Balance  <b>Note:</b> From the Insurance Data screen you can access the following screens: <ul style="list-style-type: none"> <li>▪ PF5 – Diagnosis and Procedure Data</li> <li>▪ PF11 – Billing and DRG Information</li> </ul>
PF3 then PF5	Diagnosis and Procedure Data	Patient Diagnoses, including the: <ul style="list-style-type: none"> <li>▪ DA or DF (Admitting or Final Diagnosis)</li> <li>▪ Date</li> <li>▪ ICD-9 Codes</li> <li>▪ Description of Diagnosis</li> </ul>
PF10	Comments	Comments entered by the Billing staff

## Managing Patient Accounts

### Patient Payment Arrangements

#### Patient Payment Arrangements

When patients request a time payment plan to clear outstanding balances on accounts, use the Contract Data screens in SMS to set up a payment plan.

From the **Patient Overview** screen, select PF4 to display the **Patient Contract Data Screen**.

**Note:**

- Before setting up a **Patient Installment Contract** all insurances must have a zero balance **AND** the entire Account Balance must patient liability.
- **NEVER** set up a **Patient Installment Contract** when there is an outstanding insurance balance.

PATIENT CONTRACT DATA SVC FAC: P0A8 05/20/99 1549

PT NO: 10000311 SMITH, BRIAN MR NO: 10000111 ACCT TYPE: A  
 REG: 03/02/99 DSCH: 03/24/99 FC: 9 PT: 5 EXP IND: ACCT BAL: 28321.08

BIRTHDATE: 11/10/1971 FC/EFF DT: 9 / / / /  
 GUAR NO: 0233333333 HOSP SVC/EFF DT: MDX / / / /  
 GA LN: SMITH FN: BRIAN MI:  
 PHONE USE: CTRY CD: AREA CD: PHONE: EXT:  
 PHONE USE: CTRY CD: AREA CD: PHONE: EXT:

NO OF BILLS/STMTS: 4 STMT CODE: M  
 CREDIT RATING: CTCT PER: M  
 CTCT EFF DT: 05 / 15 / 99 CTCT AMT/METHOD: 500.00 B  
 CTCT DLNQ DT: \* CTCT AMT DLNQ: \* .00  
 NO OF CTCT PAYS: 1 TOT CTCT PAY AMT: .00  
 LAST PT PAY DT: 05/13/99 LAST PT PAY AMT: -5.00  
 LAST PT STMT DT: 05/19/99 TOT NO PT PAYS: 1

ACCT BAL 28321.08 B01 V PT BAL 1012.00  
 27309.08

! (PF14) RETURN TO COLL WKST ! (PF1) DEMO DATA ! (PF3) INS DATA  
 ! (PF15) RETURN TO PT OVERVIEW ! (PF2) FIN DATA PF16 D/E  
 PF17 NAD PRESS ENTER TO COMPLETE

W201017: CONTRACT DATA HAS BEEN REVISED - CONTRACT DATA MAY BE INACCURATE. \*

Line 24 displays a warning message because the account has not been updated today

STMT CODE "M" refers to Monthly

Continued on next page

## Managing Patient Accounts

### Patient Payment Arrangements – continued

#### Setting up a

#### Patient Installment Contract

To set up an Patient Installment Contract (payment plan):

- 1) Change the Financial Class to 9.
- 2) Tab to the “CTRCT PER” field, enter an “M” at the prompt.
- 3) At the “CTRCT EFF DT” field, enter a date of “30 days” prior to the date the first Patient Installment Contract Payment is expected. The date must be the fifteenth of the month.
- 4) In the “CTRCT AMT/METHOD” field, enter the dollar amount and press the “End” key to clear the remainder of this field. Tab to the “METHOD” field and enter a “B”.
- 5) Press <Enter> to update and save the information.

#### SMS Statement Code Definitions

The table below lists the SMS Statement Codes and their definitions

Code	Definition
<b>B</b>	Statement will be sent, but will not contain a patient dunning message
<b>M</b>	System will produce a monthly statement as scheduled through VOF or the A/R Statement Schedule. This is the default Statement Code for all accounts
<b>N</b>	No statements will be produced for the account until the “N” is changed back to “M” (also known as “bill holds”)
<b>S</b>	Mail has been returned from the post office and no further statements will be automatically generated until the “S” is changed to “M”

#### Important Note:

The Patient Financial Services Department requires that you ***must*** enter an Activity Code in the “Overall Account Level Follow-up” screen for each account you “work”.

Refer to handout for detailed instructions on how to enter your activity codes (also called the **TRAC System**).

# Managing Patient Accounts

## PF5 – View Balances

1. From the Patient Overview screen select **PF5** to view a standard patient bill
2. Enter a line number to view the specific charges for a department.  
(Example: Enter line 1 to view the details of the patient's Pharmacy charges)

**Line 1  
Pharmacy  
Charges**

DETAIL SUMMARY SVC FAC: P0A8 10/22/01 0635

PT NO: 4549353 GARCIA ,RAQUEL MR NO: 42174726 ACCT TYPE: 0  
 REG: 04/10/01 DSCH: FC: S PT: C EXP IND: ACCT BAL: 3437.65  
 -----PAGE NO: 1

TOTAL CHARGES: 3437.65 NURSE STA/ROOM: /  
 ACCT BAL PT BAL  
 3437.65 3437.65

LINE	DEPARTMENT	TOTAL AMT	INS BAL	PT BAL
1	PHARMACY	402.00	0.00	402.00
2	RADIOLOGY/DX	1946.00	0.00	1946.00
3	OPERATING ROOM	441.00	0.00	441.00
4	MED/SURG SUPPLY	66.25	0.00	66.25
5	RECOVERY ROOM	582.40	0.00	582.40

-----

! (PF14) RETURN TO COLL WKST KEY IN LINE NO \_\_\_ AND PRESS ENTER  
 ! (PF15) RETURN TO PT OVERVIEW PF16 D/E \_\_\_\_

PAQCHS01

TI 0 21,63

**Detail of  
Pharmacy  
Charges**

SELECTED DETAIL DATA SVC FAC: P0A8 10/22/01 0753

PT NO: 4549353 GARCIA ,RAQUEL MR NO: 42174726 ACCT TYPE: 0  
 REG: 04/10/01 DSCH: FC: S PT: C EXP IND: ACCT BAL: 3437.65  
 -----PAGE NO: 1

ACCT BAL PT BAL  
 3437.65 3437.65

SVC	POST	SVC CD	INS	CD-DESCRIPTION/COMMENT-REF	DATE	AMOUNT
041001	041101	8068088	25	NON IONIC CONTRAST 100ML		133.00
041001	041301	8208090	25	NON-IONIC CONTRAST 200ML		269.00

-----

! (PF14) RETURN TO COLL WKST ! (PF3) DTL SUMM ! (PF11) ACCT CASH  
 ! (PF15) RETURN TO PT OVERVIEW ! (PF10) ACCT CMNTS PF16 D/E \_\_\_\_

PAQDTL01

TI 0 22,74

## Managing Patient Accounts

### PF6 – Account Detail Selection

1. From the Patient Overview screen select **PF6** to select specific account information
2. Mark the option you want to select with an “X”, press <Enter>. More than one option may be selected.

“**SVC DATE**” FROM – TO: Allows you to specify the range of service dates you have selected

“**SVC CODE**”:  
Allows you to specify the range of the service codes to display in the detail inquiry

“**POST DATE**” FROM – TO: Allow you to specify a range of post dates to limit the detail you want to display

**Enter an “X”  
to select  
Detail Type**

**SVC DATE  
SVC CODE  
POST DATE**

ACCOUNT DETAIL SELECTION      SVC FAC: P0A8      10/22/01 0802

PT NO: 4549353 GARCIA ,RAQUEL      MR NO: 42174726      ACCT TYPE: 0  
REG: 04/10/01 DSCH:      FC: S PT: C EXP IND:      TOT BAL: 3437.65

-----  
SELECT ONE OR MORE DETAIL TYPES AND SEQUENCING OPTIONS:

<input checked="" type="checkbox"/>	? ALL CHARGES	—	? PAYMENTS	—	? ROOM CHARGES
—	? LATE CHARGES	—	? ADJUSTMENTS	—	? ANCIL CHARGES
—	? BALANCE TRANSFERS	—	? COMMENTS	—	? STAT CHARGES

	FROM	TO	SEQ ORDER	A/D
SVC DATE:	__ / __ / __	__ / __ / __	—	—
SVC CODE:	_____	_____	—	—
POST DATE:	__ / __ / __	__ / __ / __	—	—

SELECT CHARGE DESCRIPTION:      G      ( G : GENERAL;      T : TECHNICAL)

! (PF14) RETURN TO COLL WKST      (PF1) PRORATED DETAILS  
! (PF15) RETURN TO PT OVERVIEW      (PF2) EXP DETAIL      PRESS ENTER TO CONTINUE  
PAQSEL01

TI      >>      0      8,34

Continued on next page

## Managing Patient Accounts

### PF6 – Account Detail Selection – continued

- Place an “X” at the “All Charges” prompt (see page 18) to view all the charges on a patient’s account.

**Patient's  
Charges**

```

SMS Mt. Zion
File Edit Connection Setup Macro Window Help
Welcome to Mount Zion

SELECTED DETAIL DATA                SVC FAC: P0A8      10/22/01 0934

PT NO:      4549353  GARCIA ,RAQUEL      MR NO: 42174726    ACCT TYPE: 0
REG: 04/10/01  DSCH:                FC: S  PT: C  EXP IND:    ACCT BAL:   3437.65
----- PAGE NO:   1
ACCT BAL                                PT BAL
3437.65                                3437.65

SVC   POST   SVC CD  INS CD-DESCRIPTION/COMMENT-REF DATE      AMOUNT
041001 041101 8068088 25  NON IONIC CONTRAST 100ML              133.00
041001 041301 8208090 25  NON- IONIC CONTRAST 200ML             269.00
041001 041101 8067117 32  IVP                                       441.00
041001 041101 8077117 32  IVP                                       180.00
041001 041301 8206165 32  ABD AORTA S&I                          1325.00
041001 041301 8206043 36  CATHETER AORTA                          441.00
041001 041301 8208005 62  CATHETER/STANDARD                       40.00
041001 041301 8208009 62  GUIDEWIRE/STANDARD                      26.25
041001 041201 5281005 71  SPEC'L PROC RECOVERY 15                 582.40

-----
! (PF14) RETURN TO COLL WKST      ! (PF3)  SELECT DTL      ! (PF11) ACCT CASH
! (PF15) RETURN TO PT OVERVIEW    ! (PF10) ACCT CMNTS    ! (PF16) D/E  ___

PAQDTL01

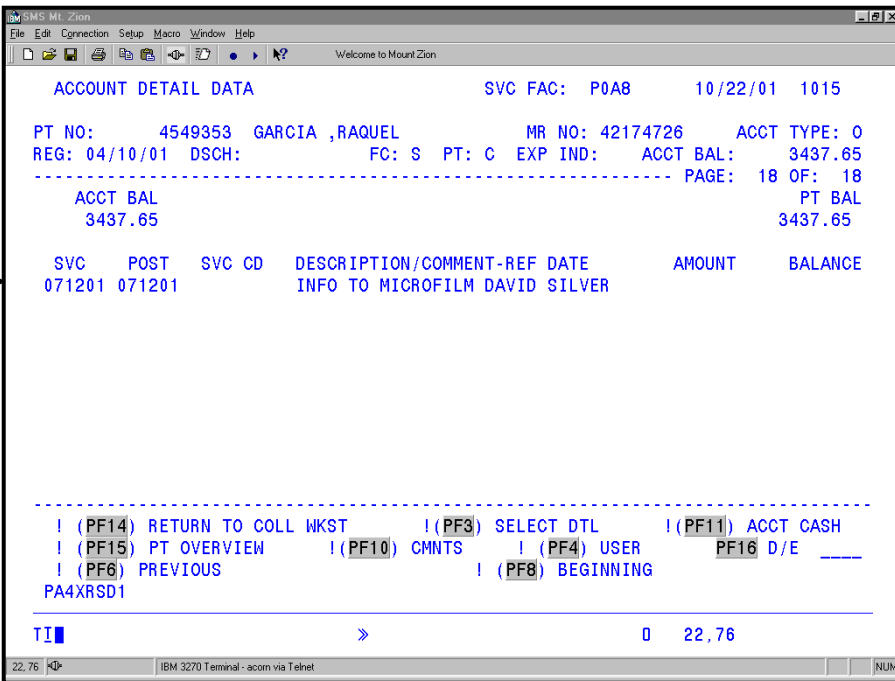
TI  >>f  0  22,74
    
```

## Managing Patient Accounts

### PF7 – Account Detail Data

1. From the Patient Overview screen select **PF7** to view the Account Detail Data.

**All  
Account  
Entries**



SVC	POST	SVC CD	DESCRIPTION/COMMENT-REF DATE	AMOUNT	BALANCE
071201	071201		INFO TO MICROFILM DAVID SILVER		

2. You must return to the “**Overall Account Level Follow-up**” screen and enter an Activity Code.

#### **Important Note:**

The Patient Financial Services Department requires that you **must** enter an Activity Code in the “**Overall Account Level Follow-up**” screen for each account you “work”.

Refer to handout for detailed instructions on how to enter your activity codes (also called the **TRAC System**).

## When you need help

When you need to...	Who to call...	Number/Pager/e-mail...
<ul style="list-style-type: none"> <li>☞ Schedule, reschedule or cancel an IDX or SMS training class</li> <li>☞ Request extra copies of documentation</li> <li>☞ <u>Request:</u> <ul style="list-style-type: none"> <li>a) Course requirements or description</li> <li>b) Verification of course pre-requisites</li> <li>c) Additional training sessions</li> <li>d) Refresher course sessions</li> </ul> </li> </ul>	<p>Kathy Lehto- Training Coordinator</p> <p>OR</p> <p>Donna Chao- Training Coordinator</p>	<p>(415) 353-2994-phone (415) 719-9372-pager <a href="mailto:kathy.lehto@ucsfmedctr.org">kathy.lehto@ucsfmedctr.org</a></p> <p>(415) 353-9264-phone <a href="mailto:donna.chao@ucsfmedctr.org">donna.chao@ucsfmedctr.org</a></p>
<ul style="list-style-type: none"> <li>☞ Request Clarification of the SMS manual</li> <li>☞ Request Training assistance</li> </ul>	Stanley Warren	(415) 502-3826
<ul style="list-style-type: none"> <li>☞ Inquire about an IMF Plan Code</li> <li>☞ Report the use of a "Z" Code</li> <li>☞ Report concerns or inquire about the IMF database</li> </ul>	IMF Help	(415) 353-4850-phone
<ul style="list-style-type: none"> <li>☞ Report a problem with your IDX logon</li> <li>☞ Inform IDX about screen problems or when your system crashes</li> <li>☞ Report concerns or inquire about the IDX system</li> <li>☞ Request an IDX or SMS Logon (after successful completion of the required training courses)</li> <li>☞ Reset a password</li> </ul>	IT Hotline	(415) 353-9000-phone
<ul style="list-style-type: none"> <li>☞ Request a Research Account creation and/or patient labels</li> </ul>	Liza Shapiro	(415) 353-7617
<ul style="list-style-type: none"> <li>☞ Ask billing questions related to a research account</li> </ul>	Patient Financial Services	(415) 353-3731
<ul style="list-style-type: none"> <li>☞ Request assistance from a Financial Counselor</li> </ul>	Financial Counseling	(415) 353-1996

## Index

### A

Additional Function Keys, 15

### B

Bill Date, 4

### C

Cirius, 4  
Claims/Charges, 3

### D

Description, 1

### E

Explanation of Benefits (EOB), 3

### I

IDX, 2  
Initial Screens, 8, 13  
Insurance Master File (IMF), 3  
Introduction, 1

### K

Keyboard Map Set-up, 6

### L

Locating Accounts in SMS, 13  
Logging Off, 7  
Logging On, 8  
Logon Screens, 7

### M

Managing Patient Accounts, 16

### N

Navigating SMS, 5

### O

Objectives, 7  
Overview, 7

### P

Patient Overview Screen, 14  
Patient Payment Arrangements, 16  
PF5 – View Balances, 18  
PF6 – Account Detail Selection, 19  
PF7 – Account Detail Data, 21  
Policy, 1

### S

Setting up a Patient Installment  
Contract, 17  
Shared Medical Systems (SMS), 2  
SMS Inquiry from the Patient Inquiry  
Overview Screen, 15  
SMS Patient Accounting, 1  
SMS Statement Code Definitions, 17  
System Walk-Through, 7

### T

Terms and Definitions, 2  
Transaction Editing System (TES), 2

### U

User Mail Date, 4

### V

Viewing Account Details using  
Function Keys, 15

**W**

**When you need help, 22**