UCSF Medical Center

SHARED MEDICAL SYSTEMS (SMS)

VIEW

IT Systems Training

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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.

Term	Definition
IDX	A software program used by UCSF that allows users to perform the following functions: ➢ Schedule patient appointments ➢ Pre-Admit/Register patients ➢ Assign Providers/Physician to inpatient/outpatient visits/stays ➢ Link Referrals/Authorizations to patient visits ➢ Attach insurance plans to patient visits ➢ Manage Professional fee (Pro Fee) accounts receivable, post charges and payments
Transaction Editing System (TES)	An application within IDX that captures and evaluates Transaction data. TES allows: ➢ Enter charges (Transactions) into Billing and Accounts Receivable (BAR) ➢ Correction of errors (Edits)
Shared Medical Systems (SMS)	A billing system that allows UCSF to: ➢ Manage Hospital Fees (Tech Fees) including: ▪ Posting charges ▪ Correcting/transferring existing charges ▪ Posting payments ➢ Post adjustments/corrections to patient accounts ➢ Respond to patient inquiries ➢ Generate a Demand Bill or Detailed Patient Statement ➢ Transfer hospital accounts to “Bad Debts”
Charge Description Master File (CDM)	A SMS database that stores: ➢ Service Code descriptions (also called procedure codes) ➢ Price ➢ UB Revenue Codes ➢ Payment Codes Adjustment Codes

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Terms and Definitions

Term	Definition
Insurance Master File (IMF)	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:
Claims/Charges	**Professional Fee (Pro Fee)** – The professional component (fee) for a procedure that represents physician's work A ***HCFA 1500*** form is used to bill: ➢ Office visits ➢ Hospital visits ➢ Consultations ➢ Radiologist (reading the x-ray/film) **Hospital (Tech Fee)** – Charges submitted by the facility that represent services provided within each department of facility A ***UB92 form*** is used to bill: ➢ EKG/ECG ➢ Radiology Technician services ➢ Phlebotomist ➢ Exam Rooms
Explanation of Benefits (EOB)	A statement sent by the insurance company to the patient and service provider advising of: ➢ Services provided ➢ Charges billed and considered ➢ Contracted amount and negotiated rate ➢ Patient liability (if any) ➢ Amount paid the insurance company (if any)

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Terms and Definitions

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

Navigating SMS

In order to…	Do this…
Advance to the next field	Press the **TAB** key Or Use the **ARROW** keys to move the cursor
Back up to the previous field	Press a **SHIFT** key along with the **TAB** key Or Use the **ARROW** keys to move the cursor
Clear the screen of: ➢ Error messages ➢ Keyboard Lock Error ➢ Line 24 Error messages	Press the **ESCAPE (ECS)** key Or Press the **PAUSE /BREAK** key Or **Shift F10**
Abandon an account **without saving changes**	Press the **SCROLL LOCK** key
Clear an entire field of existing data	Position the cursor at the first character of the field, press the **END** key
Clear part of a field of existing data **<u>IMPORTANT</u>:** ***DO NOT*** press the space bar to clear data from a field	Position the cursor at the first character to be deleted, press the **END** key to clear the following characters
Revise a data field	Position the cursor at the first character of the field, enter the revised information
Print a screen	Press the **PRINT SCREEN KEY** Click the **PRINT SCREEN ICON** Select **"FILE"** from the drop-down menu and select the **"PRINT SCREEN" OPTION**
Access a **HELP** screen	Position the cursor at the first character of the field where you need help, press the **PF24** key **(SHIFT + F12)**
Obtain **General Information** on line	Press the **PF 18** key **<u>NOTE</u>:** The PF 18 –Education option is not available on all screens
Select an option from a menu	As appropriate, perform one of the following: Press the desired **PF** key Or **Key in the option** number, press the **<Enter>** key Or Use a **mouse** to click on the option
Save work 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

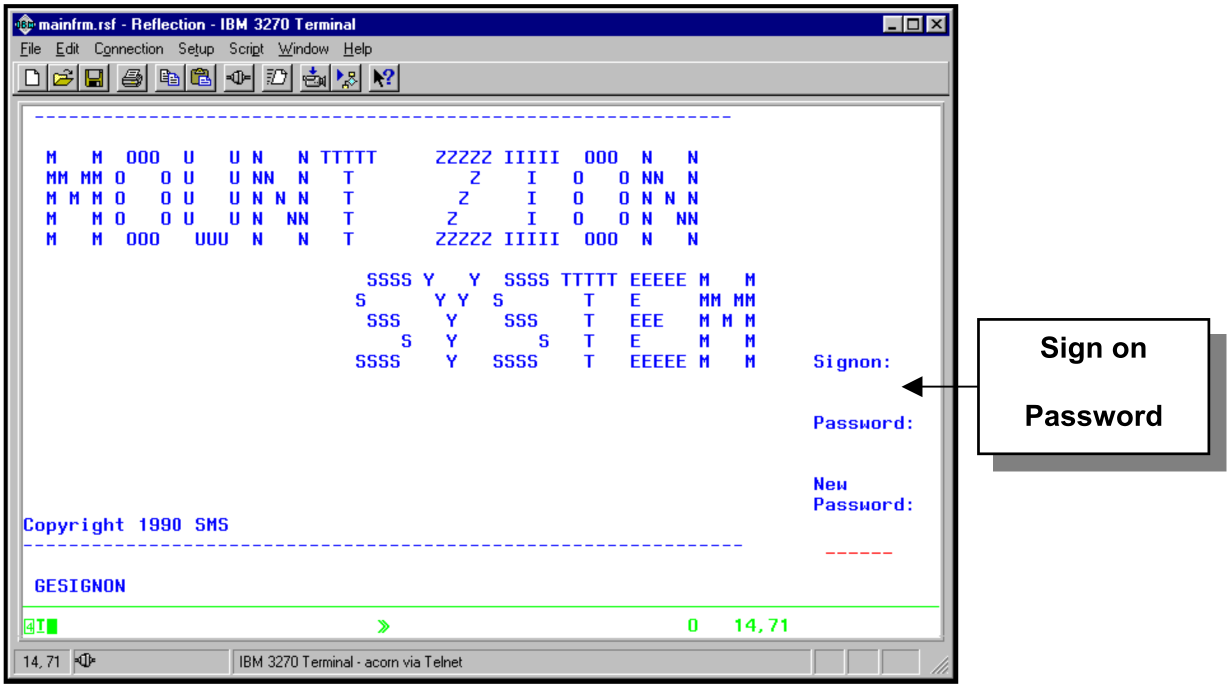
Or

Select the "File" drop-down menu, choose "Exit"

Logging On

Initial Screens

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



<u>Note #1</u>:

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.

<u>Note #2</u>:

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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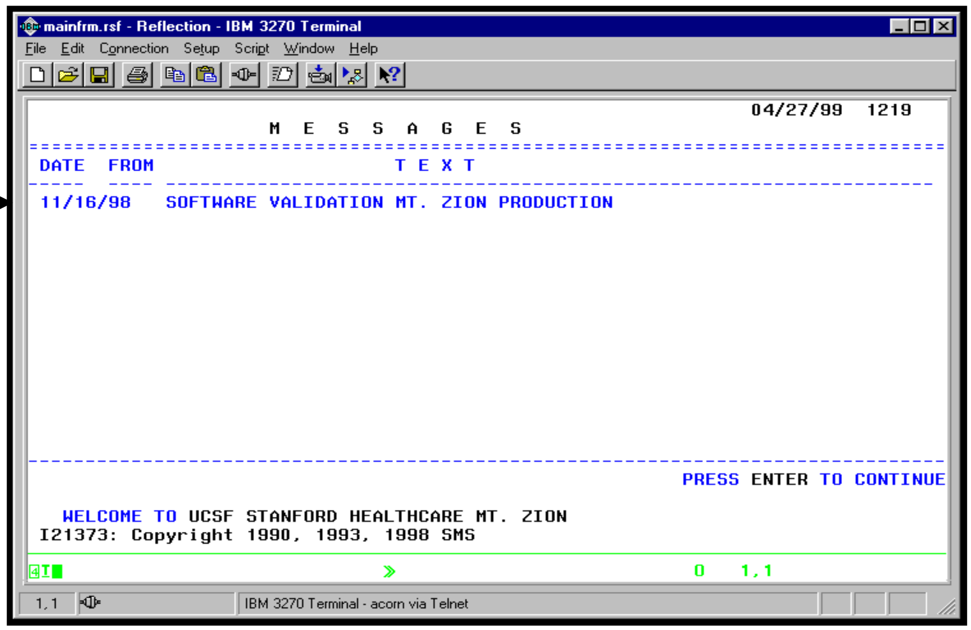
Logging On

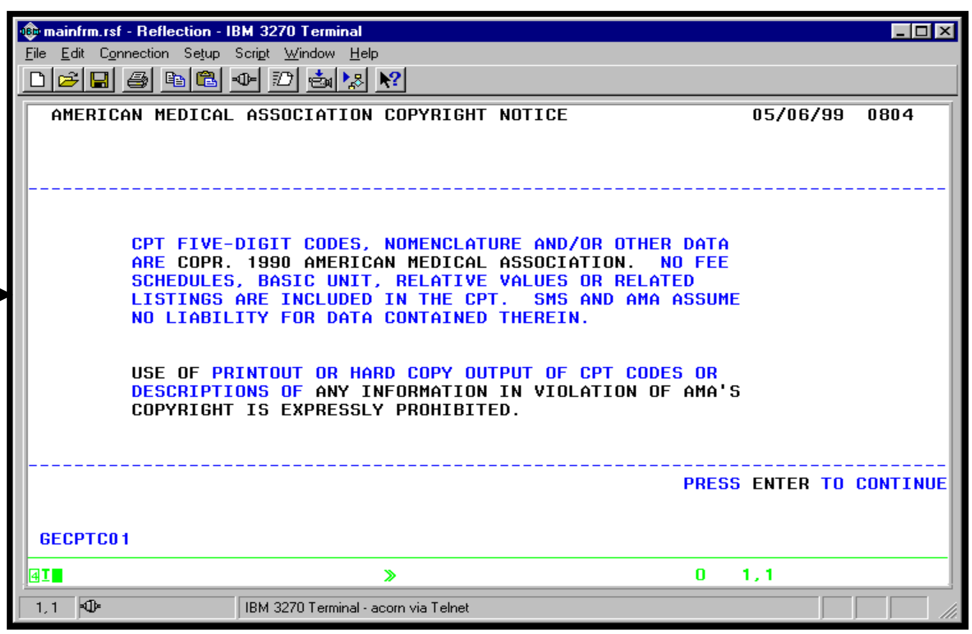
Initial Screens

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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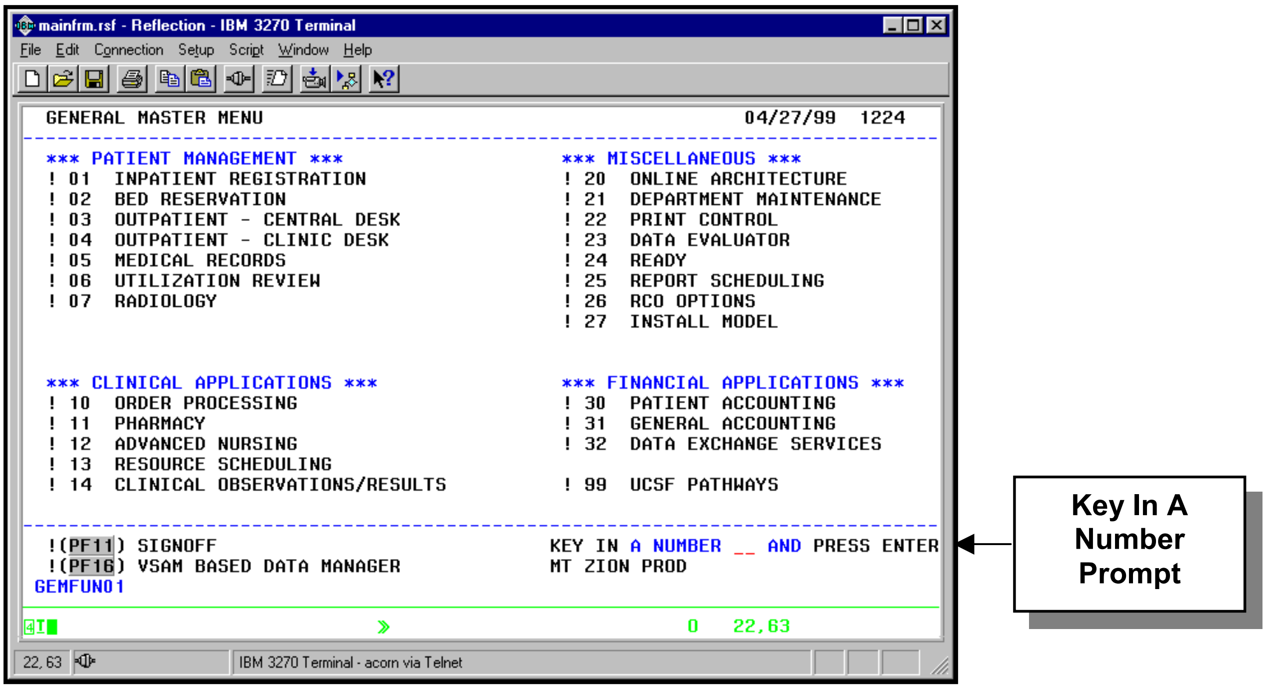
Logging On

Initial Screens

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



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.

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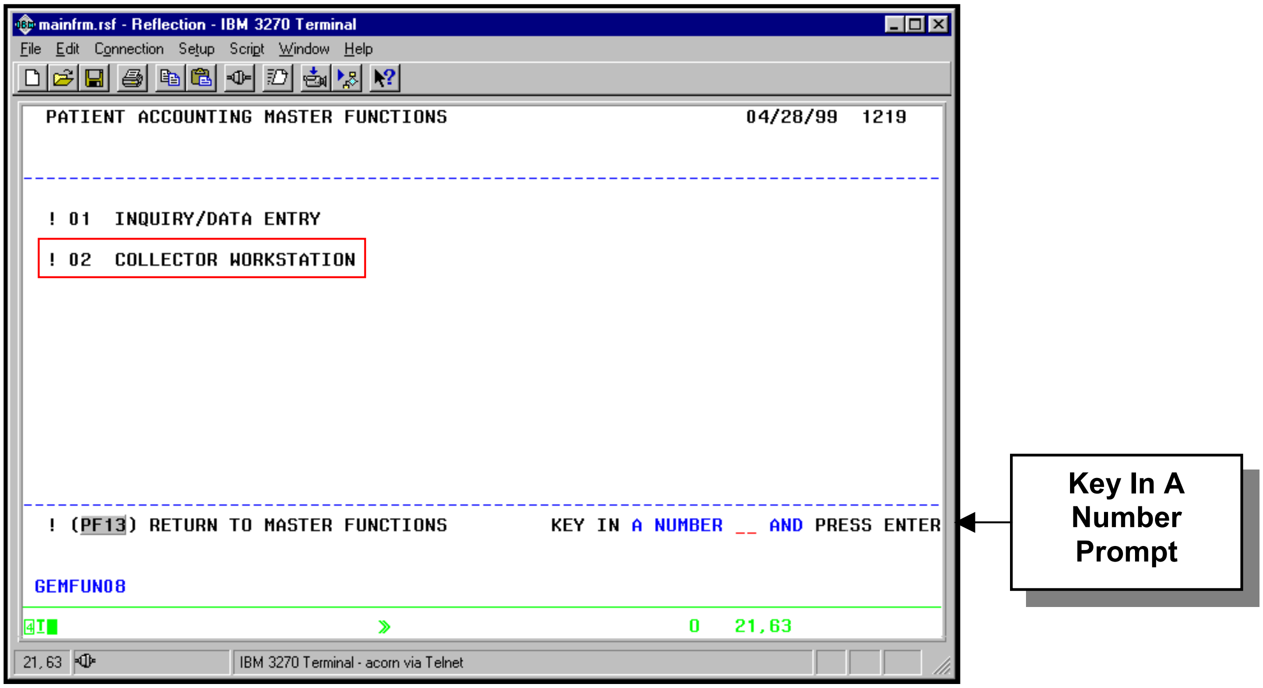
Logging On

Initial Screens

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



<u>Note</u>:

This screen provides two options:

- **<u>01 Inquiry/Data Entry</u>**
  This option is used to access the Patient Inquiry (PTIQ) screens only

- **<u>02 Collector Workstation</u>**
  This option is used to access a SMS generated file of your assigned accounts (Work List)

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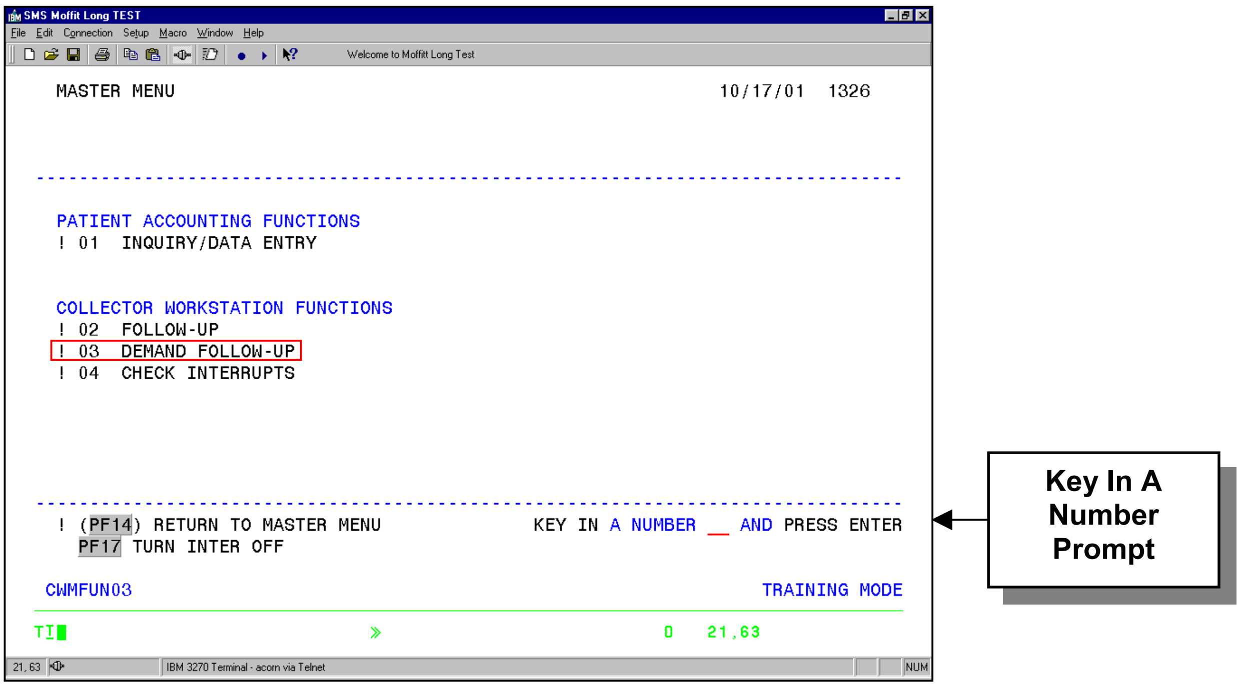
Logging On

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

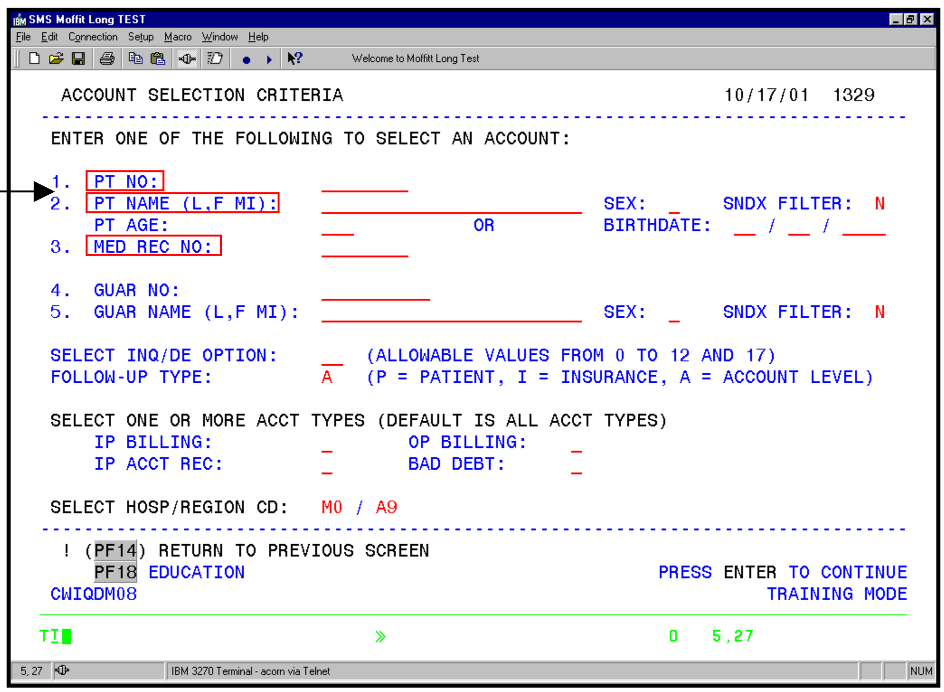
Initial Screens

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) **AND** Patient's sex (M or F)	Jones,MaryJ **F** (for Female)
Guarantor Number	Case number from IDX or Mother's account number for a newborn with Medi-Cal	System assigned through IDX interface

Account/Patient Number

Patient Name

Medical Record Number



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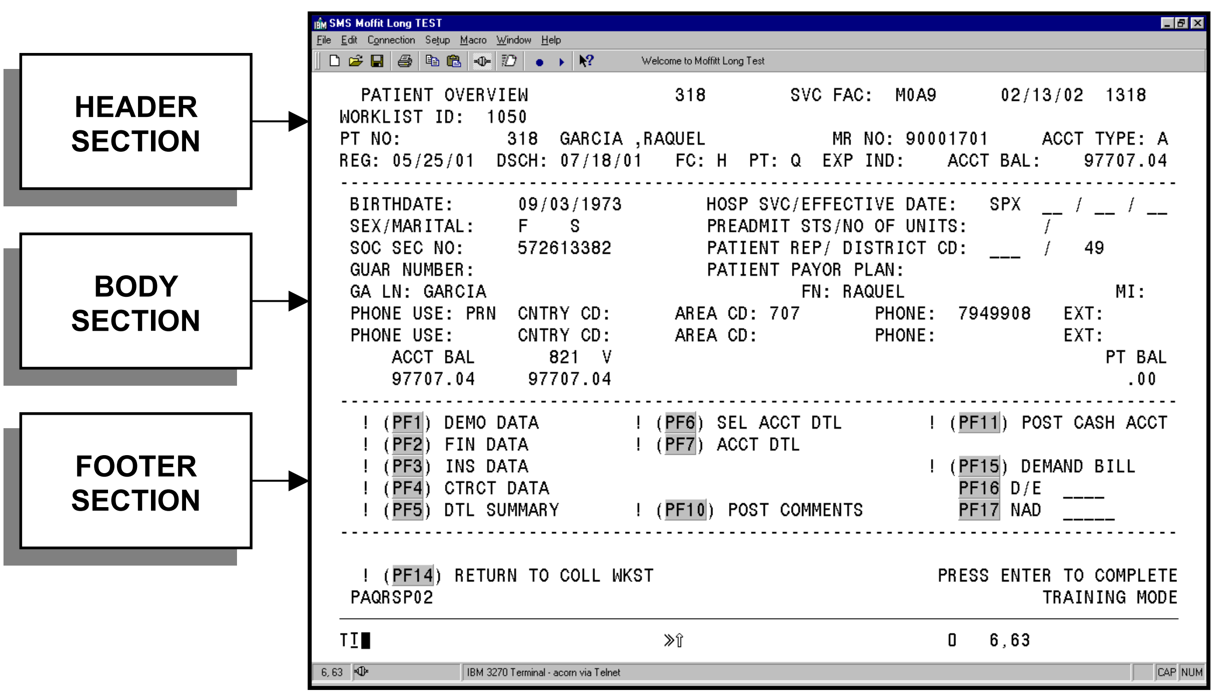
Patient Overview Screen

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: ▪ Demo Data ▪ Financial Data ▪ Insurance Data ▪ Contract Data ▪ Detail Summary ▪ Select Account Detail ▪ Post Comments ▪ Post Cash Accounts System Messages, Including: ▪ E = Error Message ▪ I = Informational Message ▪ W = Warning Message

Patient Account Type Codes

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



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: ▪ Payments ▪ Adjustments ▪ Charges	Allows you to select specific account information, including: ▪ Charges ▪ Transfers ▪ Payments ▪ Adjustments ▪ Comments	Shows all account entries, including: ▪ Charges ▪ Payments ▪ Account Changes ▪ Comments

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 **Note:** From the Insurance Data screen you can access the following screens: ▪ PF5 – Diagnosis and Procedure Data ▪ PF11 – Billing and DRG Information
PF3 then PF5	Diagnosis and Procedure Data	Patient Diagnoses, including the: ▪ DA or DF (Admitting or Final Diagnosis ▪ Date ▪ ICD-9 Codes ▪ Description of Diagnosis
PF10	Comments	Comments entered by the Billing staff

Managing Patient Accounts

Patient Payment Arrangements

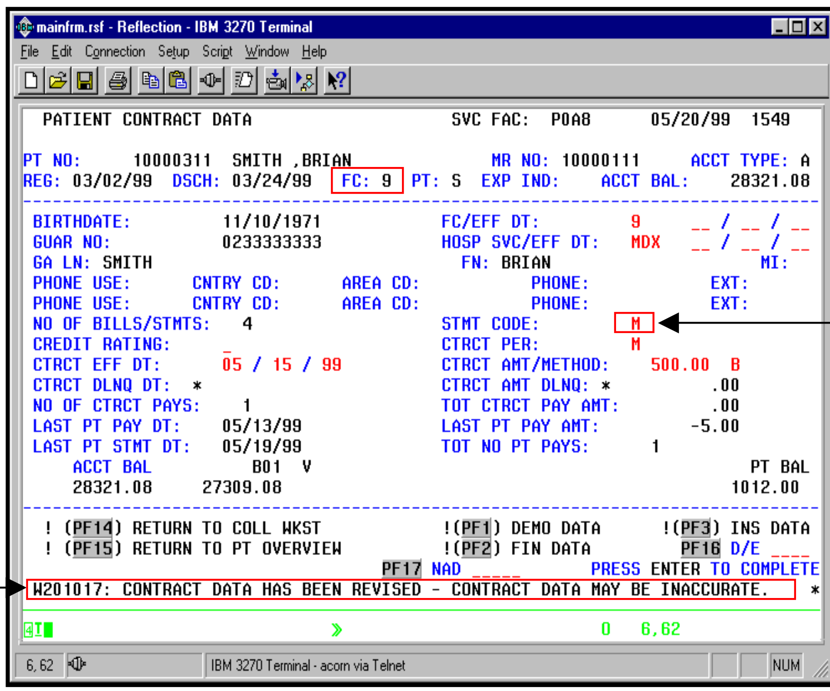
Patient Payment Arrangements

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.



STMT CODE “M” refers to Monthly

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

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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 the fifteenth of the month.
4) In the **"CRTCT 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	Statement will be sent, but will not contain a patient dunning message
M	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
N	No statements will be produced for the account until the "N" is changed back to "M" (also know as "bill holds")
S	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:

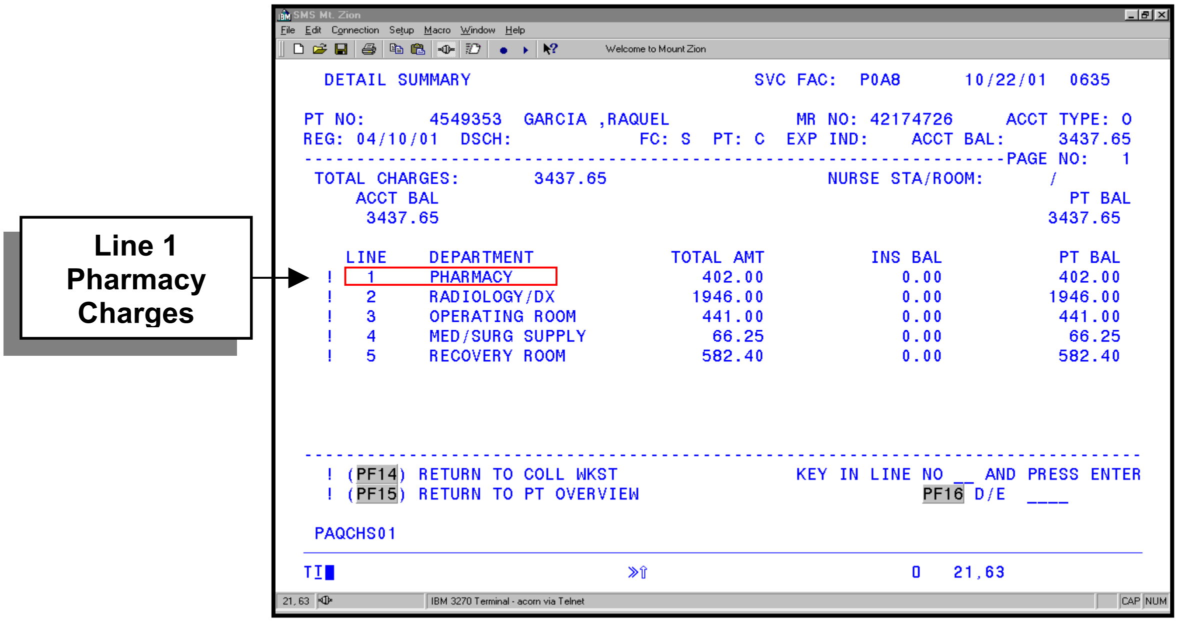
The Patient Financial Services Department requires that you ***must*** enter an Activity Code in the **"Overall Account Level Follow-up"** screen for each account you "work".

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

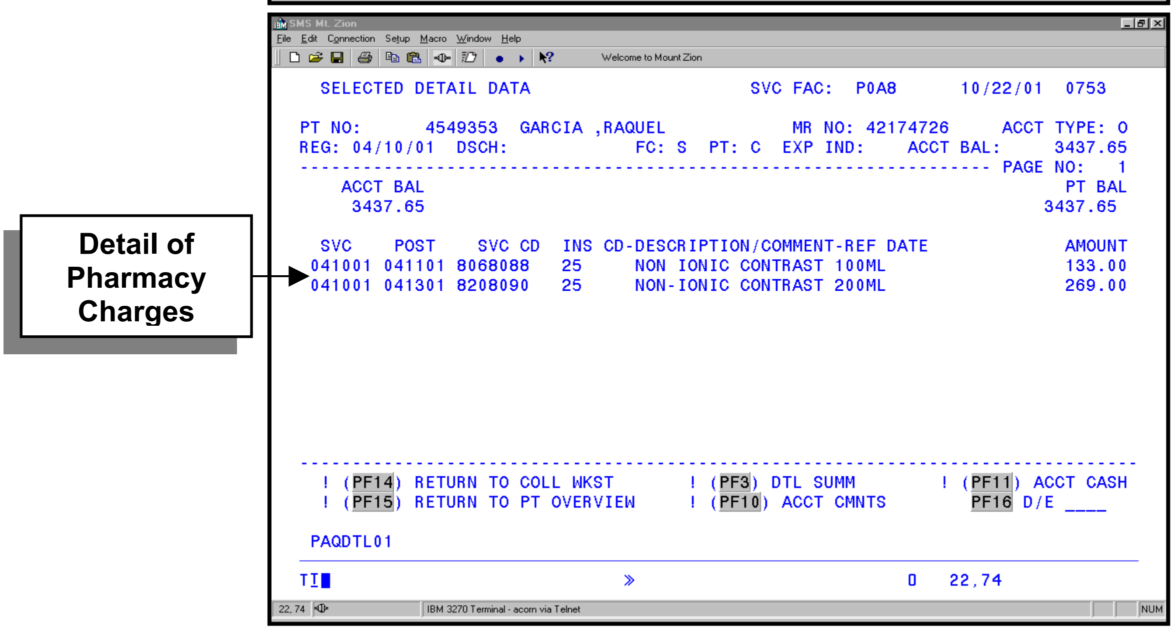
Managing Patient Accounts

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)




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

PT NO:      4549353  GARCIA ,RAQUEL           MR NO: 42174726     ACCT TYPE: O
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
```



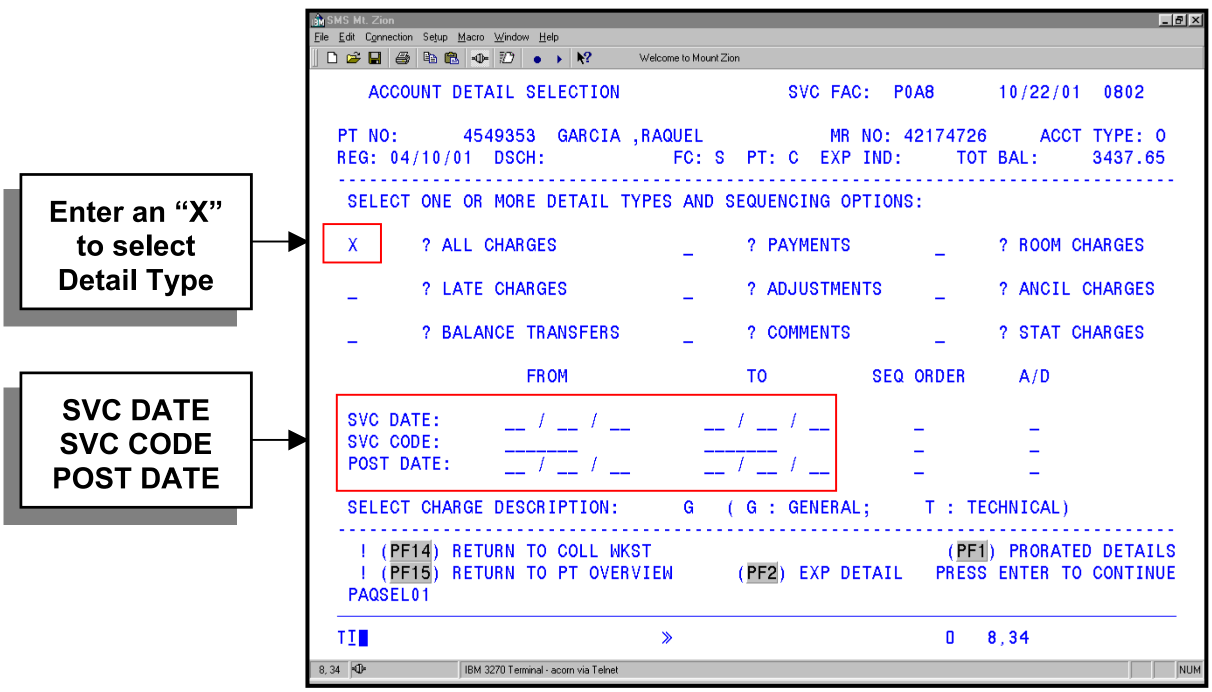

```
 SELECTED DETAIL DATA                        SVC FAC:  P0A8      10/22/01  0753

PT NO:      4549353  GARCIA ,RAQUEL           MR NO: 42174726     ACCT TYPE: O
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



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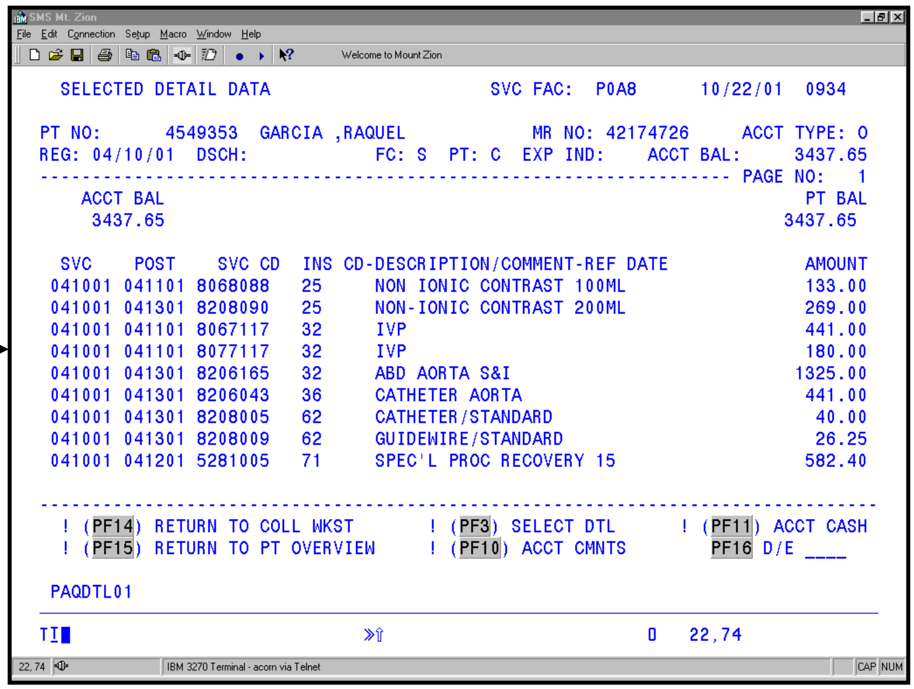
Managing Patient Accounts

PF6 – Account Detail Selection – continued

3. Place an **"X"** at the "All Charges" prompt (see page 18) to view all the charges on a patient's account.

Patient's Charges

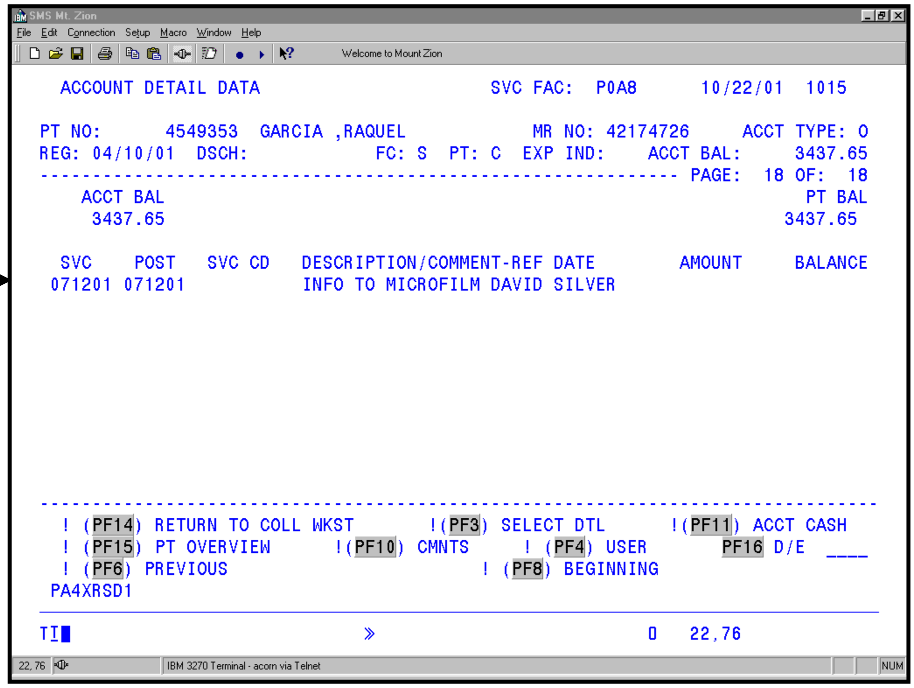


Managing Patient Accounts

PF7 – Account Detail Data

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

All Account Entries



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

<u>**Important Note**</u>:

The Patient Financial Services Department requires that you <u>***must***</u> 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…
Schedule, reschedule or cancel an IDX or SMS training class Request extra copies of documentation Request: a) Course requirements or description b) Verification of course pre-requisites c) Additional training sessions d) Refresher course sessions	Kathy Lehto- Training Coordinator OR Donna Chao- Training Coordinator	(415) 353-2994-phone (415) 719-9372-pager kathy.lehto@ucsfmedctr.org (415) 353-9264-phone donna.chao@ucsfmedcrtr.org
Request Clarification of the SMS manual Request Training assistance	Stanley Warren	(415) 502-3826
Inquire about an IMF Plan Code Report the use of a "Z" Code Report concerns or inquire about the IMF database	IMF Help	(415) 353-4850-phone
Report a problem with your IDX logon Inform IDX about screen problems or when your system crashes Report concerns or inquire about the IDX system Request an IDX or SMS Logon (after successful completion of the required training courses) Reset a password	IT Hotline	(415) 353-9000-phone
Request a Research Account creation and/or patient labels	Liza Shapiro	(415) 353-7617
Ask billing questions related to a research account	Patient Financial Services	(415) 353-3731
Request assistance from a Financial Counselor	Financial Counseling	(415) 353-1996

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