



Doc Name:	System Requirement Specification
Version No.:	1.6
Contact Person(s):	Bhupender Singh

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1. General Information

1.1 Document Change Log

Version	Date Issued	Created By	Summary	Reviewed by
1.0	Nov 30, 2012	Bhupender Singh	Prepared initial draft	Balwinder Singh
1.1	Jan 16, 2013	Bhupender Singh	Changes of payment module	Balwinder Singh
1.2	Feb 20, 2013	Bhupender Singh	<ul style="list-style-type: none">• Update on hold process in charge batching system• Change "Query Coding/CE" drop-down to "Reason to reject" on rejection page for charge batching system• Update insurance type drop down on rejection page• DOS fields will be field by user not auto generated.• Payment batch and charge batch list should be descending order• +/- posting should appear in productivity and payment batch details• Checkbox on payment batch add page to add more payment batch.• Used Email Temples instead of Email Temples list.• Search on created date on payment batch search page	Balwinder Singh
1.3	Mar 11, 2013	Bhupender Singh	<ul style="list-style-type: none">• Change SRS as per Peachy's suggestions	Balwinder Singh



Version	Date Issued	Created By	Summary	Reviewed by
1.4	Mar 12, 2013	Bhupender Singh	• Change SRS as per Peachy's suggestions	Balwinder Singh
1.5	May 23, 2013	Bhupender Singh	• Update screenshots for AR module	Balwinder Singh
1.6	June 19, 2013	Bhupender Singh	• Update document as per Argus team's and Peachy's suggestions (During Peachy's Visit at India)	Balwinder Singh

1.2 Principal Contacts

Primary Contact:	Balwinder Singh
Project Sponsor:	Peachy Paulino
Business Owner:	Peachy Paulino
Project Manager:	Balwinder Singh

2. Software Specifications

The following development environment will be used to develop the application.

Type	Name
Operating system	Linux
Web Server	JBoss 7
Database	MySQL 5
Scripting Language	Java 1.6.x
Web Browser	IE8, IE9, Firefox 10 and Safari 5

3. Introduction

Argus KPM (Knowledge & Process Management) system will be a web browser-based application with following modules.

- Knowledge Management System / Argus Process Manual and Trainee Progress Tracking & Evaluation
- Process Management System - Productivity Reporting and Workflow Management
 - Coding/ Charge Posting
 - Payment Posting
 - Account Receivable (AR)
 - Credentialing
 - Accounting
- QA/ Audit

Knowledge and Process Management System (KPM System) refers to a system for managing knowledge and processes in organizations to support creation, capture, storage and dissemination of information. It captures the core business processes of Argus. It will make employees more efficient and make them follow protocols when this information are easy to access, by having them available online and when it is managed at a central location. It will enable employees to search the information quickly and respond to customer immediately. Information modification will become centralized i.e. all employees will have access to the same information. Any modification in the information will reflect to all employees immediately and they will be able to see the modification history on the same page. Training of new employees will become easy as the knowledgebase will be available online which can be demonstrated anywhere anytime.

The KPMS immediate benefits are the following:

- Eliminate re-entry of data for reporting due to the manual process of reports on different areas.
- Reduce process cycle time
- Reduce cost
- Enhance functional effectiveness
- Increased organizational adaptability

The Process Management (Productivity, QA/Audit and Workflow) section will automate the existing process and its reports. QA will be associated with all productivity modules as well as the workflow functions.

The web application will manage three types of users in KM system.

1) Admin: Admin will manage department and other type of users like standard user, document manager and trainee. He will associate departments to users.

2) Standard User: Standard user are those users who will read it, study it and use it for their work within the business process along with customer supports. A standard user will have rights to access all information from all departments within this application.

A. **Trainee:** Trainees is a type of Standard user. Trainees are those users who will use the knowledge base for training or learning. Trainee is not a different type of user, but it will be an option for standard users to change their login type i.e. login as 'Standard' or 'Trainee'. If a standard user login as trainee, user will able to see the information only from their assigned department. And there will be an option for read confirmation for trainee where user has to confirm whether they have read the information or not. This feature will be only for Trainee login session.

B. **Standard User with Extra Permission:** these are users which will be granted with specific access e.g. related to Workflow processes (such as Argus Team Leaders to respond to queries, Argus Managers for approval, etc.)

C. **Extra Permission of Super Department Admin:**

- AR
- Charge Batch
- Charge Production (Demo, CE, Coding, Reject Log)
- Payment Batch
- Payment production (ERA, NON-ERA-CAP)

4. Section 1. Administration - User, Department, Role, Extra Permission (definition), etc.

4.1.1. User Authentication and Authorization Module

4.1.1.1. Login Page

Each user can access the system after login from this page. The username (email), password will authenticate from database. If the user has authenticated, then user will move it to the dashboard. If user fills out the wrong login details, then user will get the message about this. This page will have the link for “Forgot password” page also. On clicking this link, user will be redirected to “forgot password” page. On successful login, logs will manage in database for that user.

At the time of Login, each user will be able to view the time as per the PST Time Zone.

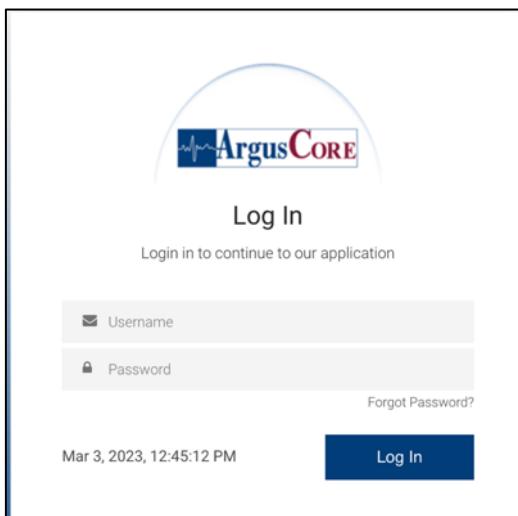


Figure 1: Login Page

Authorize user according to their role, department and extra permission.

After successful login the system will automatically detect the user's role, departments and assigned extra permissions and the user will act accordingly in the system.

4.1.1.2. Forgot Password Page.

This page will appear when user clicks on the “Forgot Password” link on login page. User needs to enter valid email address (Registered in system) and click on “Send Password”. When user clicks on “Send Password” button then user will receive new password over email address and redirect to the login page.

If the email is not valid, then a validation message will appear.

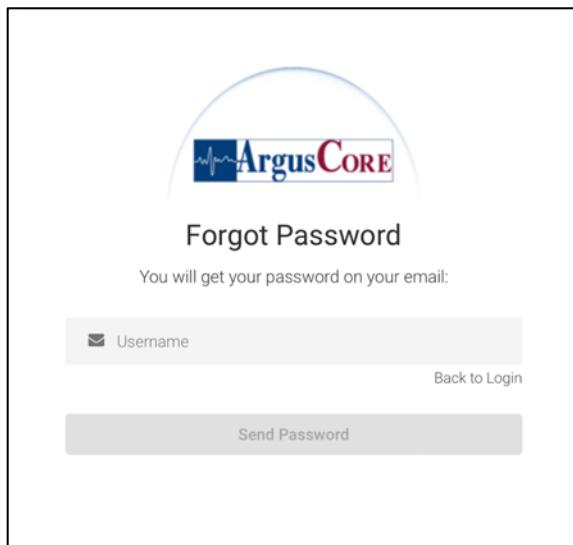


Figure 2: Forgot password page.

4.1.2. Admin Dashboard

4.1.2.1. Dashboard/Landing Page

After Successfully Logging-In, User will be landing on the dashboard where Admin screen will be displaying following 2 divided Sections:

- User: Under this section, Admin will be able to view the following information:
 - Total Users, Active Users & In-Active Users

Also, on click of the above-mentioned Information, Admin will be redirected to that particular detailed page i.e., “User Section” where information regarding each user will be available.

- Other Statistics: Admin will be able to view the following Statistic information:

- Total Doctors, Total Insurances, Total Payment Types, Total Departments, Total Companies & Total Group.
- Can access it by Selecting -> Dashboard from Left Navigation bar.

Admin can access the links mentioned under the sections. Ref – Figure: 3

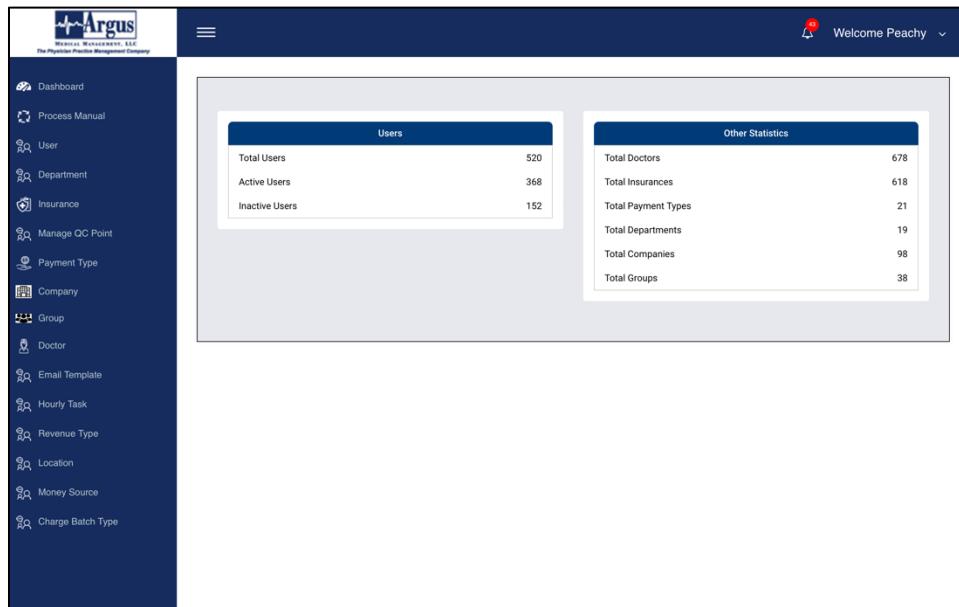


Figure no: 3 Dashboard/Landing Page

4.1.2.2. Change Password Page.

After login user can change his/her password from this page. This option will appear in the top right corner available menu (Drop down “Admin” menu-> Change Password) as shown in Figure 4. User needs to enter valid old password, new password and same confirmation password as shown in Figure 4.1. User will receive the successfully updated message on screen regarding password change. Users will receive an email also on their registered email address.

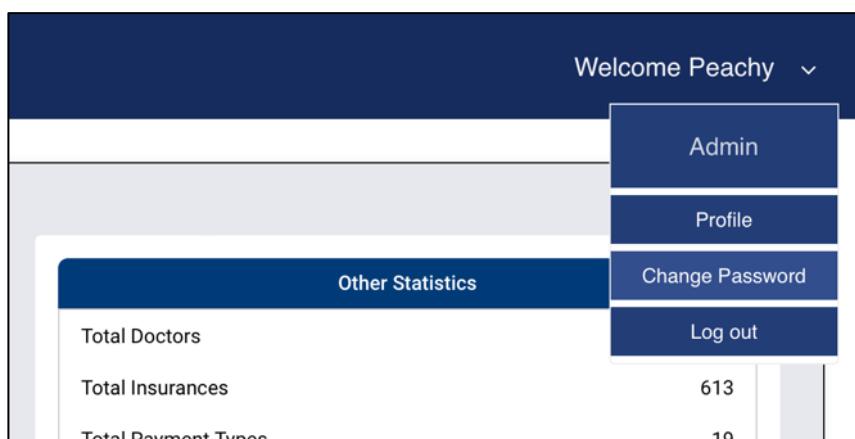


Figure: 4 Option Drop-Down

User needs to enter the Old Password then only User will be able to proceed and Set-up New Password.

The screenshot shows a 'Change Password' form. It contains three text input fields: 'Old Password*' (filled with red asterisks), 'New Password*' (filled with red asterisks), and 'Confirm Password*' (filled with red asterisks). Below the fields is a 'Change Password' button.

Figure: 4.1 Change Password

If user enters the Incorrect old password or new password & confirm password does not match, the system will show the error notification “Password Does not Match” as shown below in Figure 4.2.

The screenshot shows a 'Change Password' form with three input fields. The 'Old Password*' field contains red asterisks. The 'New Password*' field contains three dots. The 'Confirm Password*' field contains three dots and has a red error message 'Password doesn't Match' to its right. Below the fields is a 'Change Password' button.

Figure: 4.2 Change Password - Error

Once the User successfully changes the password the system will show a “Password Changed Successfully” pop-up notification.

4.1.2.3. Profile page

Users can change their information after logging in from their profile page. This option for Updating profile will appear in the top right corner (Drop down “Admin” menu -> Profile) as shown in Above figure 5.1. The page will have all the user’s information. This page will show the user’s First Name, Last name, E-mail section, Contact information & Address as shown in Figure 5.2.

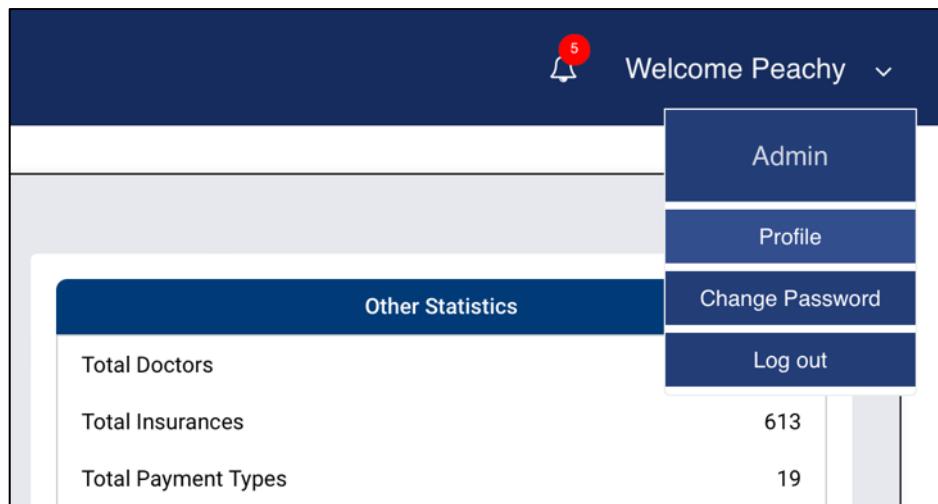


Figure: 5.1 Admin Menu Drop Down

The screenshot shows a "My Profile" form. It contains five input fields: "First Name*" with placeholder "Peachy", "Last Name*" with placeholder "Paulino", "Email*" with placeholder "ppaulino@argusmso.com", "Contact*" with placeholder "12345678910", and "Address" with placeholder "xyzzz". Below the form is a blue "Update Profile" button.

Figure: 5.2 My Profile Page

Once the User makes changes and Updates the Profile the system will show “Successfully Updated” Notification.

Users can't change email address. User can manage his/her email notifications:

a. Process Manual Update Alerts

Users will not get process manual updates alerts (Emails) if admin unchecks this checkbox.

b. Notification on Trainee Evaluations

User will not get email on trainee evaluation if he will uncheck this checkbox.

4.1.2.4. Notification

The Users can check their notification after logging in. This option will appear in the top right corner with “Bell Icon” besides “Admin Menu”) as shown in below figure 6.1. The page will show all the user’s Recent 5 Notifications and User can hide the notification by clicking on “Hide” button on the right side of each notification.

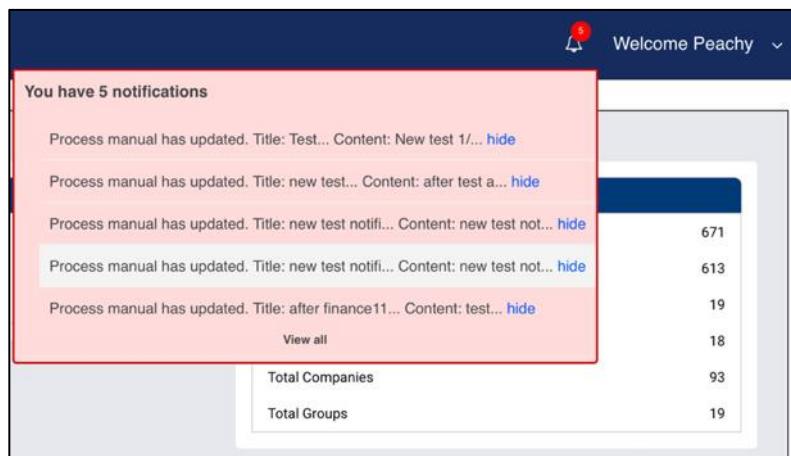


Figure: 6.1 Notification

User can view all notifications by selecting “View All” option from the bottom of notification Drop-down menu & User can hide the notification by clicking on “Hide” button on the right side of each notification as shown below in figure: 6.2.

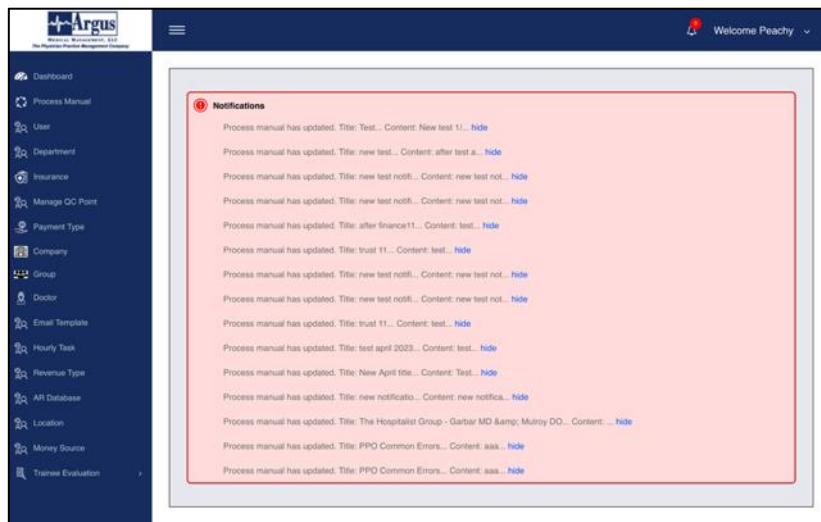


Figure: 6.2 Notification Menu – View All

4.1.3. Process Manual

The Process manual (Section) can be associated with multiple departments/ sub-departments. Admin can only view this section and can check which user has made the modifications and on which date.

4.1.3.1. List process manuals

This page will appear from left navigation bar (Process manual -> List sections). There will be a list which has clickable section name (Process manual titles) and its sub-sections as shown in below figure: 7. When the user clicks on the link, user will be redirected to the process manual detail page as shown below in Figure: 7.1.

Figure: 7 Process Manual

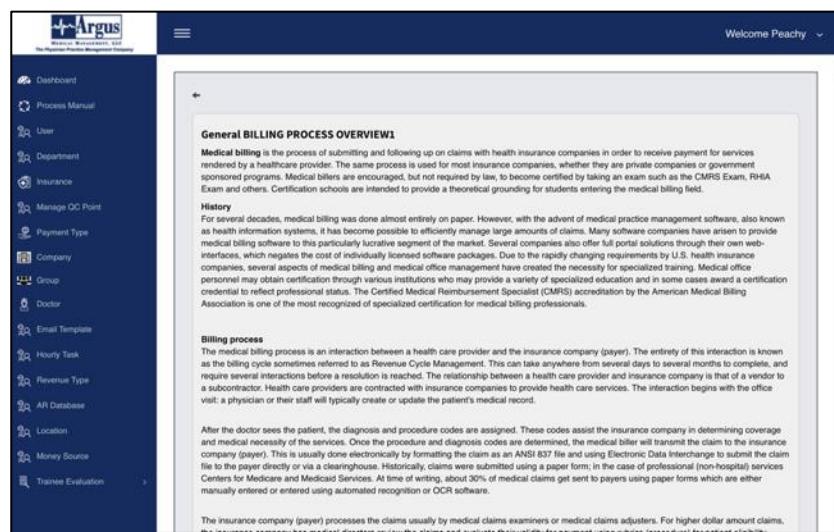


Figure: 7.1 Process Manual Detail

Also, on click of “Back Arrow” icon on top left corner as shown in Figure: 7.1, user will be redirected to the Process Manual Page.

4.1.3.2. Modification Summary

After selecting any “Process manual section” Admin can check which User has modified the User Manual and when it has been modified by selecting the “Modification Summary” option as shown in below figure: 8.1.



Figure: 8.1 User Manual – Modification Summary

On the click of “Modification summary” a pop-up will appear as shown in below figure: 8.2 which will let Admin check the details of modifications made to the process manual, following details will appear in this section:

- Process Manual Name: This section will display the “Process Manual” Information which has been modified or deleted.

- Modified By: This section will display “User’s Name” who has modified this process manual.
- Modified On: This section will display the “Date & Time” when this process manual has been modified.

The screenshot shows a 'Modification Summary' section with a blue header bar. Below it is a list of modifications in a scrollable area. Each modification entry consists of a message, a 'Modified By' field, and a timestamp. The messages indicate various deletions and updates made by different users on different dates.

Modification Summary	
Sub-Section 'Main Sub- Process Manual 2' has been deleted in this process manual.	Modified By: Sunil Verma, On: Mar 9, 2016, 8:00:08 AM
Updated	Modified By: Jasbir Singh, On: Mar 17, 2016, 7:40:42 AM
Updated	Modified By: Jasbir Singh, On: Mar 18, 2016, 4:06:42 AM
Updated	Modified By: Jasbir Singh, On: Mar 25, 2016, 9:24:16 PM
Updated	Modified By: Jasbir Singh, On: Mar 25, 2016, 9:29:21 PM
Sub-Section 'MCR - page 1' has been deleted in this process manual.	Modified By: Ravi Kumar, On: Mar 28, 2016, 8:28:12 PM
Sub-Section 'Main Sub- Process Manual 2' has been deleted in this process manual.	Modified By: Sunil Verma, On: Mar 9, 2016, 8:00:08 AM

Figure: 8.2 User Manual – Modification Summary

4.1.4. User

4.1.4.1. Add User

Users can't register in the system directly. Only the Admin can Add New user. Admin will create user using following screen. The fields marked with (*) are mandatory fields. Admin will select a role for user, can associate multiple departments with user and can assign multiple extra permissions to that user. Add user page can appear from left navigation (Users -> Add New User) as shown below in figure:18. There will be validation for valid email address also on this page. Admin needs to set user's access Active/Inactive.

Add User

First Name*

Last Name

Email*

Role*

Contact

Address

Active In-Active

Figure: 18 Add User page

If any validation error message appears on the screen, then admin will remain on the “Add User” page or else admin will be redirected to the “User List.”

Duplicate user check on email address

If the email address already exists in database and admin try to add the user with same email address, then validation message will appear. Email address will remain unique in the system.

Assign role to User.

Admin will assign roles (Role Admin, user, & trainee) of the user.

After Successfully Adding the User, User will receive a “Successfully Added” pop-up notification & the record will get reflected under the “User List” section.

4.1.4.2. List Users [Columns: Name, Email, Status, Setup, Action]

After selecting the “User” option from the Left Navigation Bar, the system will allow the admin to view the User’s Information in the “User List” menu as shown in below figure: 9. This page will appear from left navigation (Users -> User List).

Setup	Action	Name	Email	Status
		Peachy Paulino	ppaulino@argusmsos.com	Active
		Bhupender Singh	bhupender.s@idsil.com	Active
		trainee user	traineear@yopmail.com	Active
		Peachy Paulino	peachypaulino@gmail.com	Active
		Imran Khan	imran.k@idsil.com	Active
		Vidyadhar Sharma	vidyadhar.s@idsil.com	Active
		Eva Pleitez	epleitez@argusmsos.com	Active
		Veronica Lopez	vlopez@argusmsos.com	Active
		Sunil Verma	sunil.verma@idsil.com	Active

Figure: 9 User List

The following columns will appear in list:

- Name: User’s name will be displayed under this Column.
- Email: User’s Email will be displayed under this Column.
- Status: User’s Active/In-Active Status will be displayed under this Column.
- Setup: The Setup menu will provide following functionalities:
 - Reset Password: Admin can change the selected User’s Password, on the Click of “Reset Password” Icon from “Setup” column as shown below in figure:10.

Also, on click of Reset Password a confirmation Pop-up will appear on the screen. Where will be allowed to select “Yes” to confirm the reset password or “No” to discard as shown below in Figure: 10.1.

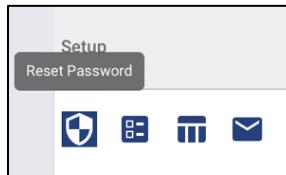


Figure: 10 Reset Password – Setup

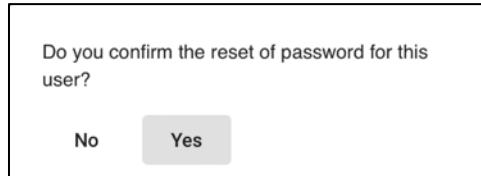


Figure: 10.1 Reset Password Pop-up – Setup

- Set Permissions: Admin will be able to manage the selected User's Extra permissions on the Click of "Set Permissions" Icon from "Setup" column as shown below in figure: 11.1, where "List of Permissions" will be displayed as shown in Figure: 11.2.

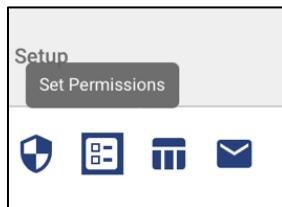


Figure: 11.1 Set Permissions – Setup

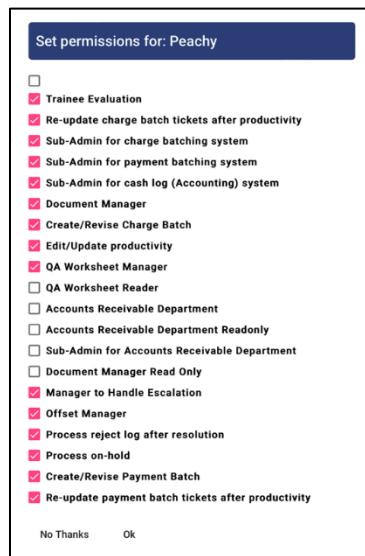


Figure: 11.2 Set Permissions

- Set Departments: Admin will be able to manage/set the selected User's Department on the Click of "Set Departments" Icon from "Setup" column as shown below in figure:12.1, where "List of Departments" will be displayed as shown in Figure: 12.2.

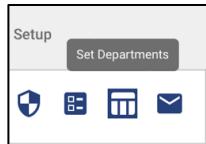


Figure: 12.1 Set Departments - Setup

A screenshot of a dialog box titled 'Set Departments for: Peachy'. The box contains a list of departments with checkboxes next to them. Some checkboxes are checked, while others are empty. At the bottom of the list are two buttons: 'No Thanks' and 'Ok'.

Set Departments for: Peachy	
<input checked="" type="checkbox"/>	Accounting Department
<input checked="" type="checkbox"/>	LKO
<input type="checkbox"/>	Accounts Receivable Department
<input type="checkbox"/>	CHDP
<input type="checkbox"/>	HMO
<input type="checkbox"/>	MCL
<input type="checkbox"/>	MCR
<input type="checkbox"/>	PPO
<input type="checkbox"/>	Self Pay and CEP
<input type="checkbox"/>	Work Comp
<input type="checkbox"/>	Coding and Charge Entry Department
<input type="checkbox"/>	Charge Entry
<input type="checkbox"/>	Coding Primary Care
<input type="checkbox"/>	Coding Specialist
<input type="checkbox"/>	Demo and Verification
<input type="checkbox"/>	Payments Department
<input type="checkbox"/>	ARGUSIDS
<input type="checkbox"/>	Payments Posting
<input type="checkbox"/>	Treasury

No Thanks Ok

Figure: 12.2 Set Departments

After making required changes User needs to click on "Ok" to confirm the changes & if User clicks on "No Thanks" option for any changes made will be discarded.

- Set Email Subscription: Admin will be able to manage/set the selected User's E-Mail Subscription on the Click of "Set Email Subscription" Icon from "Setup" column as shown below in figure:13.1. where "List of E-Mail Subscription" will be displayed as shown in Figure: 13.2.

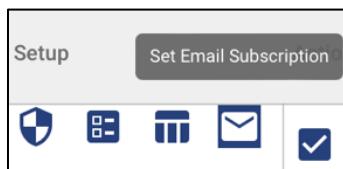
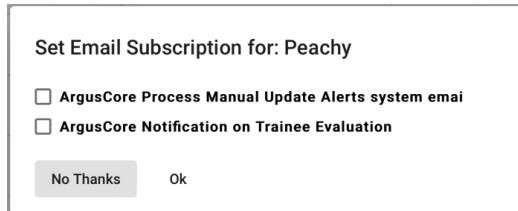
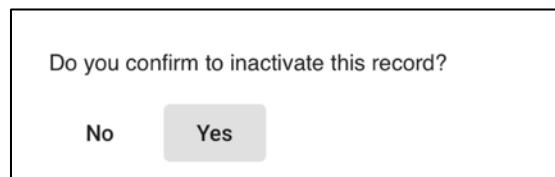


Figure: 13.1 Set Email subscription - Setup**Figure: 13.2 Set E-mail Subscription**

After making required changes User needs to click on “Ok” to confirm the changes & if User clicks on “No Thanks” option for any changes made will be discarded.

- Action: The Action menu will provide following functionalities:
 - Status Checkbox: Selecting this checkbox will allow Admin to set “Active” status & Deselecting this Checkbox will set “In-Active” status for the selected User as shown below in Figure: 14.

**Figure: 14 Active/In-Active Status Check Box****Figure: 14.1 Active/In-Active Status Confirmation**

Also, on click of Active/In-Active Status Check Box a confirmation Pop-up will appear on the screen. Where user will be allowed to select “Yes” to confirm the Active/Inactive state or “No” to discard as shown below in Figure: 10.1.

- Edit: Selecting “Edit” Icon as shown below in Figure: 15.1 option will allow Admin to Edit/Update the information of the selected user as shown in Figure: 15.2.

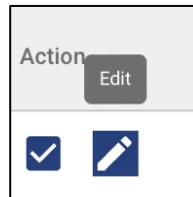


Figure: 15.1 Edit - Action

Update User	
First Name*	Peachy
Last Name	Paulino
Email*	ppaulino@argusmsos.com
Role*	(dropdown menu)
Contact	12345678910
Address	xyzzz
<input checked="" type="radio"/> Active <input type="radio"/> In-Active	
<input type="button" value="Cancel"/> <input type="button" value="Update"/>	

Figure: 15.2 Update/Edit users

After making required Editing/Updates User needs to click on “Update” to confirm the changes & if User clicks on “Cancel” option for any changes made will be discarded.

Sorting [Criteria: Name, Username, setup, email, Status]

The user list will be sorted name ascending order by default. But the list can be sort on following columns:

- Name
- Email
- Role/Permissions
- Status

Searching [Criteria: keyword (Name & email)]

There will be the following search option to filter the user list.

- Keyword search

Excel Sheet Report: Admin needs to select the “Excel” Option available on the top right corner of the “User List” menu as shown below in Figure: 17.1, which will allow Admin to Download the “User List” sheet in Excel format.

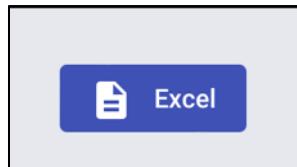


Figure: 17.1 Excel Sheet Download

ID	Name	Email	Contact	Address	Enabled	Deleted	Created On	Modified On
1	Peachy Paulino	ppaulino@argusmso.com	12345678910	xyzzz	TRUE	FALSE	2013/08/06	2023/04/24
3	bhupender Singh	bhupender.s@idsil.com	123456789	Punjab	TRUE	FALSE	2012/11/27	2023/04/25
4	trainee user	traineear@ymail.com	123456789		TRUE	FALSE	2012/11/27	2022/12/14
5	Peachy Paulino	peachypaulino@gmail.com	15622995252	5150 E. Pacific Coast Hwy, Suite 500Long Beach, CA 90804	TRUE	FALSE	1970/01/01	2022/11/28
6	Imran Khan	imran.k@idsil.com	17039531870	Mohali, India	TRUE	FALSE	1970/01/01	2023/03/14
7	Vidyadhar Sharma	vidyadhar.r@idsil.com	17039531870	Mohali, India	TRUE	FALSE	1970/01/01	2023/03/02
8	Eva Pleitez	epleitez@argusmso.com	15622995221	Long Beach, CA	TRUE	FALSE	1970/01/01	2013/03/05
9	Veronica Lopez	vlopez@argusmso.com	15622995242	Long Beach, CA	FALSE	FALSE	1970/01/01	2015/06/23
10	Sunil Verma	sunil.verma@idsil.com	17039531870	Mohali, India	TRUE	FALSE	1970/01/01	2022/09/26
11	Ravinder Sehrawat	ravinder.s@idsil.com	17039531870	Mohali, India	TRUE	FALSE	1970/01/01	2014/02/05
12	Surinder Kumar	surinder.k@idsil.com	17039531870	Mohali, India	TRUE	FALSE	1970/01/01	2013/11/11
13	Suresh Verma	suresh.v@idsil.com	17039531870	Mohali, India	TRUE	FALSE	1970/01/01	2017/04/17
14	Jayanta Kumar Mishra	jayanta.m@idsil.com	17039531870	Noida, India	FALSE	FALSE	1970/01/01	2015/09/09
15	Imee Tanseco	itanseco@argusmso.com	15622995223	Long Beach, CA	TRUE	FALSE	1970/01/01	2014/04/02
16	Rosalie Pettigrew	rpettigrew@argusmso.com	15622995228	Long Beach, CA	TRUE	FALSE	1970/01/01	2014/02/21
17	Mary Keys	mkeys@argusmso.com	15622995222	Long Beach, CA	FALSE	FALSE	1970/01/01	2016/02/09
18	Maria Infante	minfante@argusmso.com	15622995234	Long Beach, CA	FALSE	FALSE	1970/01/01	2016/02/15
19	Annie Garces	agarces@argusmso.com	5622995254	Long Beach, CA	TRUE	FALSE	2013/08/01	2014/08/29
20	Balwinder Singh	balwinder.singh@idsil.com			TRUE	FALSE	2013/07/30	2013/08/01
21	Asha Ram	asha.r@idsil.com	17039531870	Mohali, India	TRUE	FALSE	2013/08/05	2013/10/08

Figure: 17.2 Downloaded Excel Sheet

Filter Options

There will be the following filter options to filter the user list:

- All: This filter section will allow Admin to view All “Active, In-Active & Deleted User’s” list.
- Active: This filter section will allow Admin to view only All “Active User’s” list.
- In-active This filter section will allow Admin to view only All “In-Active User’s” list
- View only: This filter section will allow Admin to “Only View” all the Active, In-active & Deleted Users list.

4.1.5. Department

4.1.5.1. Add Department.

This page will appear from left navigation bar (Department -> Add Department).

Admin will fill in the user details – Name, Parent Department, Description, and Add as shown below in Figure: 23. If the "Parent Department" drop-down is left blank then a validation error message will appear on the screen, the admin, therefore, will remain on the "Add Department" page or else the admin will be redirected to the "Department list" page with a success message. The fields marked with (*) are mandatory fields.

The screenshot shows a 'Add Department' form. It includes fields for 'Name*' (with placeholder 'Enter Name'), 'Parent Department' (a dropdown menu with placeholder 'Select Parent Department'), 'Description' (a text area with placeholder 'Enter Description'), and a status section with radio buttons for 'Active' (selected) and 'In-Active'. At the bottom are 'Cancel' and 'Add' buttons.

Figure: 23 Add Department

If any validation error message appears on the screen, then admin will remain on the "Add Department" page or else admin will be redirected to the "Department List."

Duplicate Department check

Department names should be unique. If the admin enters the department name which already exists in the database, then an error message will appear there.

After Successfully Adding the Department, User will receive a "Successfully Added" pop-up notification & the record will get reflected under the "Department List" section.

While Adding New Department Admin needs to select the “Parent Department”, from the following lists of Parent Departments:

- Accounting Department
- Accounts Receivable Department
- Coding and Change Entry Department
- Payments Department

4.1.5.2. List Departments [Columns: Name, Parent Department, Status, Action]

After selecting the “Department” option from the Left navigation bar, the system will allow the admin to view the Department Information in the “Department List” menu as shown below in figure: 19. This page will appear from left navigation (Department -> Department List).

Action	Name	Parent Department	Enabled
<input checked="" type="checkbox"/>	Accounting Department		Active
<input checked="" type="checkbox"/>	Accounts Receivable Department		Active
<input checked="" type="checkbox"/>	ARGUSIDS	Payments Department	Active
<input checked="" type="checkbox"/>	Charge Entry	Coding and Charge Entry Department	Active
<input checked="" type="checkbox"/>	CHDP	Accounts Receivable Department	Active
<input checked="" type="checkbox"/>	Coding and Charge Entry Department		Active
<input checked="" type="checkbox"/>	Coding Primary Care	Coding and Charge Entry Department	Active
<input checked="" type="checkbox"/>	Coding Specialist	Coding and Charge Entry Department	Active
<input checked="" type="checkbox"/>	Credentialing		Active
<input checked="" type="checkbox"/>	Demo and Verification	Coding and Charge Entry Department	Active

Figure: 19 Department List

The department list should have following columns:

- Name: Department's name will be displayed under this Column.
- Parent Department: Parent Department's name will be displayed under this Column.

- Enabled: Department's Active/In-Active Status will be displayed under this Column.
- Action: The Action menu will provide following functionalities:
 - Status: Selecting this checkbox will allow Admin to set "Active" status & Deselecting this Checkbox will set "In-Active" status for the selected Department as shown below in Figure: 20.



Figure: 20 Active/In-Active Status -Action

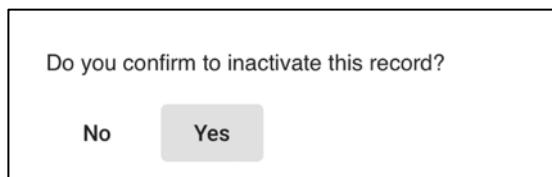


Figure: 20.1 Active/In-Active Status Confirmation

Also, on click of Active/In-Active Status Check Box a confirmation Pop-up will appear on the screen. Where user will be allowed to select "Yes" to confirm the Active/Inactive state or "No" to discard as shown below in Figure: 20.1.

- Edit: Selecting "Edit" Icon as shown below in Figure:21.1 will allow Admin to Edit/Update the information of the selected Department Only Name, Description & Status can be updated as shown in Figure: 21.2.

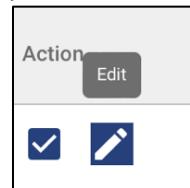


Figure: 21.1 Edit -Action

The screenshot shows a modal window titled "Update Department". It contains the following fields:

- Name***: A text input field containing "Charge Entry".
- Parent Department**: A dropdown menu showing "Coding and Charge Entry Department" as the selected option.
- Description**: A text area containing "Team that handles all the charge entry of primary care and specialist chargess.".
- Active**: A radio button group with "Active" selected and "In-Active" as an option.
- Buttons**: Two buttons at the bottom: "Cancel" and "Update".

Figure: 21.2 Edit/Update Department

After Editing/Updating the department, User needs to click on “Update” to confirm the changes & if User clicks on “Cancel” option for any changes made will be discarded.

While Updating Department Admin needs to select the “Parent Department” as shown below in figure: 21.3, following are the lists of Parent Departments:

- Accounting Department
- Accounts Receivable Department
- Coding and Change Entry Department
- Payments Department

The screenshot shows a modal window titled "Update Department". It contains the following fields:

- Name***: A dropdown menu labeled "Select Parent Department" with options: Accounting Department, Accounts Receivable Department, Coding and Charge Entry Department (which is highlighted), and Payments Department.
- Description**: A text area containing "Team that handles all the charge entry of primary care and specialist chargess.".
- Active**: A radio button group with "Active" selected and "In-Active" as an option.
- Buttons**: Two buttons at the bottom: "Cancel" and "Update".

Figure: 21.3 Selecting Parent Department

Sorting [Criteria: Name]

The list will be sorted on Id by default. But the list can be sorted on the name column.

Searching [Criteria: Filter (Name), Parent Department]

There will be keyword search which will perform on department name.

Excel Sheet Report: Admin needs to select the “Excel” Option available on the top right corner of the “Department List” menu as shown below in Figure:, which will allow Admin to Download the “Department List” sheet in Excel format.

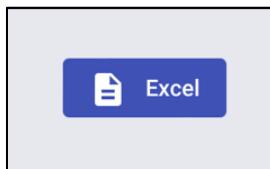


Figure:.. Excel Sheet Download

ID	Name	Parent Name	Description	Created By	Enabled
1	Coding and Charge Entry Department		Parent Department of Coding, Charge Entry and Demo and Verification	Peachy Paulino	Active
2	Payments Department		Parent department of payment posting, balancing, offsets, etc.	Peachy Paulino	Active
3	Accounts Receivable Department		Parent department of HMO, MCL/CHDP, MCR, PPO, Self Pay/CEP, WC.	Peachy Paulino	Active
4	Accounting Department		This is the parent department for Accounts Payable process and Accounting Reports.	Peachy Paulino	Active
5	Credentialing		Credentialing	Peachy Paulino	Active
6	Charge Entry	Coding and Charge Entry Department	Team that handles all the charge entry of primary care and specialist chargess.	Peachy Paulino	Active
7	Coding Primary Care	Coding and Charge Entry Department	Coding team that handles Primary Care providers.	Peachy Paulino	Active
8	Coding Specialist	Coding and Charge Entry Department	Coding team that handles Specialist providers.	Peachy Paulino	Active
9	Demo and Verification	Coding and Charge Entry Department	Team that handles all demo, eligibility and verification.	Peachy Paulino	Active
10	Payments Posting	Payments Department	Payments Posting	Peachy Paulino	Active
11	Treasury	Payments Department	Treasury	Peachy Paulino	Active
13	HMO	Accounts Receivable Department	Team that handles all accounts receivable management for HMO insurances.	Peachy Paulino	Active
14	MCL	Accounts Receivable Department	MCL and CHDP	Peachy Paulino	Active
15	MCR	Accounts Receivable Department	Team that handles all accounts receivable management for MCR insurance.	Peachy Paulino	Active
16	PPO	Accounts Receivable Department	Team that handles all accounts receivable management for PPO insurances.	Peachy Paulino	Active
17	Self Pay and CEP	Accounts Receivable Department	Self Pay and CEP	Peachy Paulino	Active
18	Work Comp	Accounts Receivable Department	Team that handles all accounts receivable management for Work Comp insurances.	Peachy Paulino	Active
19	CHDP	Accounts Receivable Department		Peachy Paulino	Active
20	LKO	Accounting Department	TBN	Peachy Paulino	Active
21	ARGUSIDS	Payments Department		Peachy Paulino	Active

Figure: Downloaded Excel Sheet

4.1.6. Insurance

4.1.6.1. Add Insurance

This page will appear from left navigation bar (Insurance -> Add insurance) as shown below in Figure: 28. This page can be accessed by Admin or users who have sub-admin extra permission for payment or charge batch system. The fields marked with (*) are mandatory fields.

This page will have following fields:

- Name

- Description

The screenshot shows a modal window titled "Add Insurance". It contains three input fields: "Name*" with placeholder "Enter Name", "Description" with placeholder "Enter Description", and a radio button group for "Status" with options "Active" and "In-Active". At the bottom are "Cancel" and "Add" buttons.

Figure: 28 Add Insurance

If any validation error message appears on the screen, then admin will remain on the “Add Insurance” page or else admin will be redirected to the “Insurance List.”

Duplicate Insurance check on insurance name

Insurance name should be unique. If Admin adds name which already exists, then validation message will appear there.

After Successfully Adding the Insurance User will receive a “Successfully Added” pop-up notification & record will get reflected under the “Insurance List” section.

4.1.6.2. Insurance List [Columns: Name, Description, Status, Action]

After selecting the “Insurance” option from the Left Navigation Bar, the system will allow the admin to view the Insurance Information in the “Insurance List” menu as shown below in figure: 24. This page will appear from left navigation (Insurance -> Insurance List)

The screenshot shows a table titled "Insurance List" with columns: Action, Insurance Name, Description, and Enabled. The table lists the following data:

Action	Insurance Name	Description	Enabled
<input checked="" type="checkbox"/>	1st Med Insurance Plan		Active
<input checked="" type="checkbox"/>	AARP2		Active
<input checked="" type="checkbox"/>	Access		Active
<input checked="" type="checkbox"/>	Acclaim		Active
<input checked="" type="checkbox"/>	Accountable Health		Active
<input checked="" type="checkbox"/>	Active Care Management		Active
<input checked="" type="checkbox"/>	Administrative Concepts Inc		Active
<input checked="" type="checkbox"/>	Advanced Benefit Solutions		Active
<input checked="" type="checkbox"/>	Advantage Care IPA		Active
<input checked="" type="checkbox"/>	Advantage Health Network		Active

Figure: 24 Insurance List

Insurance list will have following columns:

- Insurance name: Insurance's name will be displayed under this Column.
- Description: Insurance's Description name will be displayed under this Column.
- Status: Insurance's current Active/In-Active status will be displayed under this Column.
- Action: The Action menu will provide following functionalities:
 - Status: Selecting this checkbox will allow Admin to set "Active" status & Deselecting this Checkbox will set "In-Active" status for the selected Insurance as shown below in Figure: 25.



Figure: 25 Active/In-Active Checkbox – Action

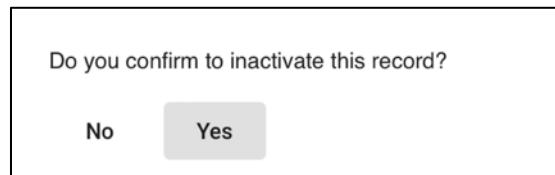


Figure:1 Active/In-Active Status Confirmation

Also, on click of Active/In-Active Status Check Box a confirmation Pop-up will appear on the screen. Where user will be allowed to select "Yes" to confirm the Active/Inactive state or "No" to discard as shown below in Figure: 20.1.

- Edit: Selecting "Edit" Icon as shown below in Figure:26.1, will allow Admin to Edit/Update the information of the selected Insurance

Name, Description & Active/In-Active can be updated as shown below in Figure:26.2.



Figure: 26.1 Edit Option - Action

The form has a blue header bar with the text "Update Insurance". Below it, there are two input fields: "Name*" containing "1st Med Insurance Plan" and "Description" containing "Enter Description". Underneath these is a row of radio buttons for "Active" (selected) and "In-Active". At the bottom are two buttons: "Cancel" and "Update".

Figure: 26.2 Update/Edit Insurance

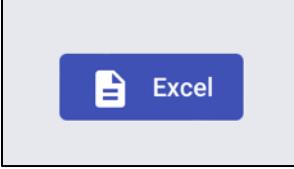
After Editing/Updating the Insurance User needs to click on “Update” to confirm the changes & if User clicks on “Cancel” option for any changes made will be discarded.

Searching [Criteria: Keyword (name)]

Sorting [Criteria: name]

The default list will sort on id. User can sort list on insurance name also.

Excel Sheet Report: Admin needs to select the “Excel” Option available on the top right corner of the “Company List” menu as shown below in figure: 42.1, which will allow Admin to download the “Company List” sheet in Excel format.



Excel

Figure: 42.1 Excel Sheet Download Button

ID	Name	Description	Created By	Enabled
1	AARP2		Bhupender Singh	Active
2	Access		Bhupender Singh	Active
3	Acclaim		Bhupender Singh	Active
4	Accountable Health		Bhupender Singh	Active
5	Aetna		Bhupender Singh	Active
6	Affiliated Doctors of OC		Bhupender Singh	Active
7	AIDS Healthcare Fdn		Bhupender Singh	Active
8	Alamitos		Bhupender Singh	Active
9	Alliance		Bhupender Singh	Active
10	Allied Healthcare		Bhupender Singh	Active
11	Allied Physicians IPA		Bhupender Singh	Active
12	Angeles		Bhupender Singh	Active
13	Apple		Bhupender Singh	Active
14	AppleCare Medical Grp		Bhupender Singh	Active
15	Arta Health		Bhupender Singh	Active
16	Arta NWOC		Bhupender Singh	Active
17	Asian Community		Bhupender Singh	Active

Figure: 42.2 Downloaded Excel Sheet

4.1.7. Manage QC Point

4.1.7.1. Add QC Point List.

This page will appear from left navigation bar (Manage QC Point-> Add QC Point) as shown below in Figure: 34. This page can be accessed by Admin or users who have sub-admin extra permission for payment or charge batch system. The fields marked with (*) are mandatory fields.

This page will have following fields:

- Name
- Parent QC Point
- Parent Department
- Sub-Parent Department
- Description
- Active/In-Active Status

The screenshot shows a 'Add QC Point' form. It includes fields for 'Name*' (with placeholder 'Enter Name'), 'Parent QC Point' (with placeholder 'Select Parent QC Point'), 'Parent Department*' (with placeholder 'Select Parent Department'), 'Sub-Parent Department' (with placeholder 'Select Sub-Parent Department'), 'Description' (with placeholder 'Enter Description'), and a radio button group for 'Status' with 'Active' selected. At the bottom are 'Cancel' and 'Add' buttons.

Figure: 34 Add QC Point

If any validation error message appears on the screen, then admin will remain on the “Add QC Point” page or else admin will be redirected to the “Manage QC Point List”.

Duplicate QC list check on QC name

QC Point name should be unique. If Admin adds name which already exists, then validation message will appear there.

After Successfully Adding the QC Point, User will receive a “Successfully Added” pop-up notification & record will get reflected under the “Manage QC Point List” section.

4.1.7.2. List QC Points [Columns: QC Point name, Department, Parent, Status, Action]

After selecting the “Manage QC Point” option from the Left Navigation Bar, the system will allow the admin to view the QC Point Information in the “Manage QC Point List” menu as shown below in figure: 29. This page will appear from left navigation (Manage QC Point -> Manage QC Point List)

Also, user will be able to search Manage QC Point List using:

- Keyword: User will be able to use “Keyword” to search Manage QC Point.
- Select Department: User will be able to select Department from “Department” drop down option.
- Sub Department: User will be able to select Sub Department from “Sub Department” drop down option.

Figure: 29 Manage QC Point list

User can select desired Search options as required. It is not Mandatory to fill all the Options provided.

After selecting the options, User will click on the “Search” button to search that task as per the Inputs provided. If the User clicks on the “Cancel” button, the selected Filters will be removed instantly.

QC Point list will have following columns:

- QC Point: QC Point Name will be displayed under this Column.
- Department: QC Point’s Department Information will be displayed under this Column
- Parent Name: QC Point’s Parent Information will be displayed under this Column.
- Status: QC Point’s Active/In-Active status will be displayed under this Column.
- Action: The Action menu will provide following functionalities:
 - Status: Selecting this checkbox will allow Admin to set “Active” status & Deselecting this Checkbox will set “In-Active” status for the selected QC Point as shown below in Figure: 30.



Figure: 30 Active/In-Active Checkbox – Action

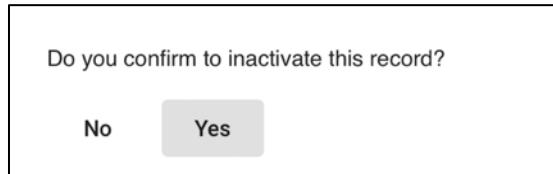


Figure:1 Active/In-Active Status Confirmation

Also, on click of Active/In-Active Status Check Box a confirmation Pop-up will appear on the screen. Where user will be allowed to select “Yes” to confirm the Active/Inactive state or “No” to discard as shown below in Figure: 20.1.

- Edit: Selecting “Edit” Icon as shown below in Figure:31.1 will allow Admin to Edit/Update the information of the selected QC Point: Name, Parent QC Point, Parent Department, Sub-Parent Department, Description & Active/In-Active Status can be updated as shown in Figure 31.2.

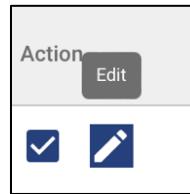


Figure: 31.1 Edit QC Point - Action

Update QC Point

Name*
1st Insurance Missing / Incorrect

Parent QC Point
Demo QC Parameters

Parent Department*
Coding and Charge Entry Department

Sub-Parent Department
Demo and Verification

Description
Enter Description

Active In-Active

Cancel Update

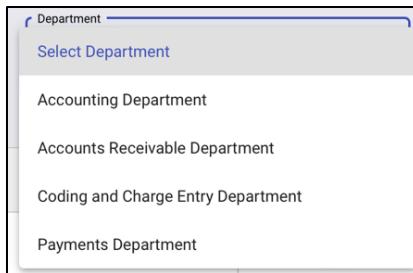
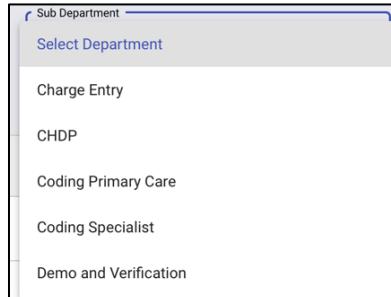
Figure: 31.2 Edit/Update QC Point

After Editing/Updating the QC Point User needs to click on “Update” to confirm the changes & if User clicks on “Cancel” option for any changes made will be discarded.

Searching [Criteria: Keyword (name), Select Department, Sub-department]

User will be able to select “Department” & “Sub-Department” from the drop-down Lists. As shown below in Figure: 33.1 & 33.2.

Or can be Searched by entering “Keyword”.

**Figure: 33.1 Select Department****Figure: 33.2 Select Sub-Department**

Excel Sheet Report: Admin needs to select the “Excel” Option available on the top right corner of the “Manage QC Type List” menu as shown below in figure: 42.1, which will allow Admin to download the “Manage QC Type List” sheet in Excel format.

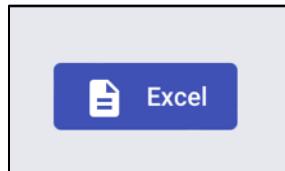


Figure: 42.1 Excel Sheet Download Button

Name	Description	Parent	Department	Sub Department	Enabled
1 Demo QC Parameters		Demo QC Parameters	Coding and Charge Entry Department	Demo and Verification	Active
2 Patient Name Missing / Incorrect		Demo QC Parameters	Coding and Charge Entry Department	Demo and Verification	Active
3 Patient Address Missing / Incorrect	Address Incorrect / Missing changed with Patient Address Missing / Incorrect WEF-11/15/2021	Demo QC Parameters	Coding and Charge Entry Department	Demo and Verification	Active
4 Phone# Missing / Incorrect	Missing/Wrong phone# changed with Phone# Missing / Incorrect WEF-11/15/2021	Demo QC Parameters	Coding and Charge Entry Department	Demo and Verification	Active
5 Emergency Contact Missing/Incorrect		Demo QC Parameters	Coding and Charge Entry Department	Demo and Verification	Active
6 MRN Missing / Incorrect		Demo QC Parameters	Coding and Charge Entry Department	Demo and Verification	Active
7 DOB Missing / Incorrect		Demo QC Parameters	Coding and Charge Entry Department	Demo and Verification	Active
8 SSN Entered Incorrect / Missing		Demo QC Parameters	Coding and Charge Entry Department	Demo and Verification	Active
9 Gender Missing / Incorrect		Demo QC Parameters	Coding and Charge Entry Department	Demo and Verification	Active
10 Marital Status Missing/Wrong Entered		Demo QC Parameters	Coding and Charge Entry Department	Demo and Verification	Active
11 Notes Field/Specialist Copy not updated	Notes Field Not Updated changed with Notes Field/Specialist Copy not Updated WEF-11/15/2020	Demo QC Parameters	Coding and Charge Entry Department	Demo and Verification	Active
12 SOCS amount Missing/Incorrect (MCD only)	Soc not/wrong updated changed with SOCS amount Missing/Incorrect (MCD only)WEF-11/15/2021	Demo QC Parameters	Coding and Charge Entry Department	Demo and Verification	Active
13 Group# & copy missing/incorrect		Demo QC Parameters	Coding and Charge Entry Department	Demo and Verification	Active
14 Consent & NPP Missing		Demo QC Parameters	Coding and Charge Entry Department	Demo and Verification	Active
15 1st Insurance Missing / Incorrect		Demo QC Parameters	Coding and Charge Entry Department	Demo and Verification	Active
16 2nd Insurance Missing / Incorrect		Demo QC Parameters	Coding and Charge Entry Department	Demo and Verification	Active
17 Insurance Effective Date Missing / Incorrect	Effective date wrong entered/Missing changed with Insurance Effective Date Missing / Incorrect	Demo QC Parameters	Coding and Charge Entry Department	Demo and Verification	Active
18 Group# & copy missing / wrong	Group# & copy missing / wrong changed with Group# Missing / Incorrect WEF-11/15/2021	Demo QC Parameters	Coding and Charge Entry Department	Demo and Verification	Active
19 POE Attached Missing / Incorrect	Eligibility proof missing /wrong changed with POE Attached Missing / Incorrect WEF-11/15/2021	Demo QC Parameters	Coding and Charge Entry Department	Demo and Verification	Active
20 Responsible Party Info Missing / Incorrect	Responsible info missing/wrong changed with Responsible Party info Missing / Incorrect WEF-11	Demo QC Parameters	Coding and Charge Entry Department	Demo and Verification	Active
21 Subscriber Info Missing / Incorrect	Subscriber missing wrong entered changed with Subscriber info Missing / Incorrect WEF-11/15/2020	Demo QC Parameters	Coding and Charge Entry Department	Demo and Verification	Active
22 Patient Demo Not Entered	Face-sheet Missing changed with Patient Demo Not EnteredWEF-11/15/2021	Demo QC Parameters	Coding and Charge Entry Department	Demo and Verification	Active
23 Authorization Not Entered / Incorrect	Authorization missing changed with Authorization Not Entered / Incorrect WEF-11/15/2021	Demo QC Parameters	Coding and Charge Entry Department	Demo and Verification	Active
24 Case Detail Missing/Invalid (WC & OB)	Not Applicable in Case of 1st PregnancyCase Detail Missing/Invalid (WC & OB), Not Applicable in C	Demo QC Parameters	Coding and Charge Entry Department	Demo and Verification	Active
25 Insurance Id Missing / Incorrect	Insurance Id wrong entered changed with Insurance Id Missing / Incorrect WEF-11/15/2021	Demo QC Parameters	Coding and Charge Entry Department	Demo and Verification	Active
26 Duplicate Account Created		Demo QC Parameters	Coding and Charge Entry Department	Demo and Verification	Active
27 Charge Entry QA Parameters		Demo QC Parameters	Coding and Charge Entry Department	Charge Entry	Active

Figure: 42.2 Downloaded Excel Sheet

4.1.8. Payment type

4.1.8.1. Add Payment Type

This page will appear from left navigation (Payment types -> Add Payment type) or from payment type list page as shown below in Figure: 39. This page can be accessed by Admin or users who have sub-admin extra permission for payment or charge batch system. The fields marked with (*) are mandatory fields.

This page will have following fields:

- Name
- Description
- (Active/Inactive)

Add paymentType

Name*
Enter Name

Description
Enter Description

Active In-Active

Cancel Add

Figure: 39 Add Payment Type

If any validation error message appears on the screen, then admin will remain on the “Add Payment Type” page or else admin will be redirected to “Payment Type List” page with success message.

4.1.8.2. List payment types [Columns: Name, Description, Action]

After selecting the “Payment Type” option from the Left Navigation Bar, the system will allow the admin to view the Payment Type information in the “Payment Type List” menu as shown below in figure: 35. This page will appear from left navigation (Payment Type -> Payment Type List)

Payment Type List [Add New](#) [Excel](#)

Action Payment Type Name Description Status

	Admin Income	Admin Income	Active
	Agency Income	Income	Active
	Ancillary Income	Ancillary Income	Active
	CAP	CAP	Active
	Correspondence	Correspondence	Active
	EFT/FFS	EFT/FFS	Active
	ERA/FFS	ERA/FFS	In-Active
	FFS	FFS	Active
	Insurance Letters		Active
	IPA FFS	IPA FFS	Active
Figure: 35 Payment Type List

The Payment Type list will have following columns:

- Payment type name: Payment Type Name will be displayed under this column.
- Description: Payment Type's description will be displayed under this column.

- Status: Payment Type's Active/In-Active status will be displayed under this column.
- Action: The Action menu will provide following functionalities:
 - Status: Selecting this checkbox will allow Admin to set "Active" status & Deselecting this Checkbox will set "In-Active" status for the selected Payment Type as shown below in Figure: 36.



Figure: 36 Active/In-Active Checkbox – Action

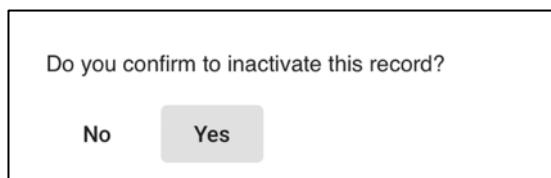


Figure 36.1 Active/In-Active Status Confirmation

Also, on click of Active/In-Active Status Check Box a confirmation Pop-up will appear on the screen. Where user will be allowed to select "Yes" to confirm the Active/Inactive status or "No" to discard as shown below in Figure: 20.1.

- Edit: Selecting "Edit" Icon as shown below in Figure:37.1 will allow Admin to Edit/Update the information of the selected Payment Type: Name, Description & Active/In-Active can be updated as shown below in Figure 37.2.



Figure 37.1 Edit Payment Type - Action

The screenshot shows a modal dialog box with a dark blue header bar containing the text "Update paymentType". Below the header are two input fields: "Name*" with the value "Admin Income" and "Description" with the value "Admin Income". Underneath these fields is a radio button group labeled "Active" (which is selected) and "In-Active". At the bottom of the dialog are two buttons: "Cancel" and "Update".

Figure: 37.2 Update/Edit Payment Type - Action

After Editing/Updating the Payment Type details User needs to click on “Update” to confirm the changes & if User clicks on “Cancel” option for any changes made will be discarded.

Searching [Criteria: Keyword (name)]

There will be keyword search which will work on name column.

Sorting [Criteria: name]

By default, the list will sort on name.

Feed data for payment types

- Admin Income
- Ancillary Income
- CAP
- Correspondence
- EFT/FFS
- ERA/FFS
- FFS
- Insurance Letters
- IPA FFS
- NSF
- Offset
- Refund - AP
- OTC
- N/A
- System Refund
- Patient Payment

Duplicate payment type check on name

The payment type name should be unique, else validation message will appear when admin save the page.

After Successfully Adding the Payment Type, User will receive a “Successfully Added” pop-up notification & record will get reflected under the “Payment Type List” section.

Excel Sheet Report: Admin needs to select the “Excel” Option available on the top right corner of the “Payment Type List” menu as shown below in figure: 42.1, which will allow Admin to download the “Payment Type List” sheet in Excel format.

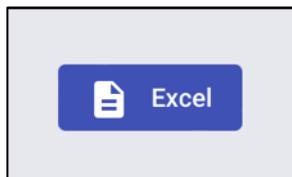


Figure: 42.1 Excel Sheet Download Button

2	Ancillary Income	Ancillary Income	Active
3	CAP	CAP	Active
4	EFT/FFS	EFT/FFS	Active
5	FFS	FFS	Active
6	IPA FFS	IPA FFS	Active
7	NSF	NSF	Active
8	Offset	Offset	Active
9	OTC	OTC	Active
10	Patient Payment	Patient Payment	Active
11	Refund-AP	Refund-AP	Active
12	System Refund	System Refund	Active
13	N/A	N/A	Active
14	Correspondence	Correspondence	Active
15	ERA/FFS	ERA/FFS	In-Active
16	Refund - Credit Card	Refund - Credit Card	Active
17	Agency Income	income	Active
18	Incurrence Letters		Active

Figure: 42.2 Downloaded Excel Sheet

4.1.9. Company

4.1.9.1. Add Company

This page will appear from left navigation (Company -> Add Company) as shown below in Figure: 43. This page can be accessed by Admin or users who have sub-admin extra permission for payment or charge batch system. The fields marked with (*) are mandatory fields.

This page will have following fields:

- Name
- Status (Active/Inactive)

Add Company

Name*

Enter Name

Active In-Active

Cancel Add

Figure: 43 Add Company

If any validation error message appears on the screen, then admin will remain on the “Add Company” page or else admin will be redirected to the “Company list.”

Duplicate Company name check

Company name should be unique. If Admin adds name which already exists, then validation message will appear there.

After Successfully Adding the Company, User will receive a “Successfully Added” pop-up notification & record will get reflected under the “Company List” section.

4.1.9.2. Company List [Columns: Name, Status, Action]

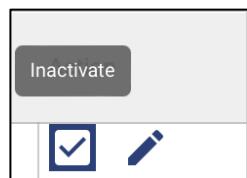
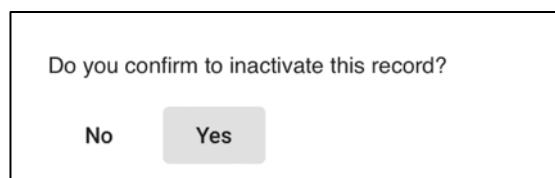
After selecting the “Company” option from the Left Navigation Bar, the system will allow the admin to view the Company Information in the “Company List” menu as shown below in figure: 40. This page will appear from left navigation (Company -> Company List).

Action	Payment Type Name	Description	Status
<input checked="" type="checkbox"/>	Admin Income	Admin Income	Active
<input checked="" type="checkbox"/>	Agency Income	income	Active
<input checked="" type="checkbox"/>	Ancillary Income	Ancillary Income	Active
<input checked="" type="checkbox"/>	CAP	CAP	Active
<input checked="" type="checkbox"/>	Correspondence	Correspondence	Active
<input checked="" type="checkbox"/>	EFT/FFS	EFT/FFS	Active
<input type="checkbox"/>	ERA/FFS	ERA/FFS	InActive
<input checked="" type="checkbox"/>	FFS	FFS	Active
<input checked="" type="checkbox"/>	Insurance Letters		Active
<input checked="" type="checkbox"/>	IPAFS	IPAFS	Active

Figure: 40 Company List

Company list will have following columns:

- Name: Company's Name will be displayed under this column.
- Status: Company's Active/In-Active Status will be displayed under this column.
- Action: The Action menu will provide following functionalities:
 - Status: Selecting this checkbox will allow Admin to set "Active" status & Deselecting this Checkbox will set "In-Active" status for the selected Company Type as shown below in Figure: 41.

**Figure: 41 Active/In-Active Checkbox – Action****Figure: 1 Active/In-Active Status Confirmation**

Also, on click of Active/In-Active Status Check Box a confirmation Pop-up will appear on the screen. Where user will be allowed to

select “Yes” to confirm the Active/Inactive state or “No” to discard as shown below in Figure: 20.1.

- Edit: Selecting “Edit” Icon as shown below in Figure:41.1 will allow Admin to Edit/Update the information of the selected Company: Name can be updated as shown below in Figure: 41.2.

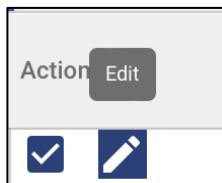


Figure: 41.1 Active/In-Active Checkbox - Action

Figure: 41.2 Update/Edit Company

After Editing/Updating the Company Type details User needs to click on “Update” to confirm the changes & if User clicks on “Cancel” option for any changes made will be discarded

Searching [Criteria: Keyword (name), Status]

Excel Sheet Report: Admin needs to select the “Excel” Option available on the top right corner of the “Company List” menu as shown below in figure: 42.1, which will allow Admin to download the “Company List” sheet in Excel format.

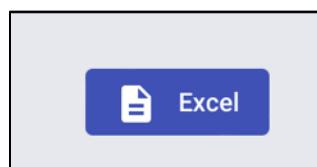


Figure: 42.1 Excel Sheet Download Button

A	B	C	D	E
ID	Name	Enabled	Created On	Modified On
1	Access Primary Care Physicians, Inc	TRUE	2022/03/17	2022/05/03
2	Advanced Dermatology Care Center	TRUE	2022/03/17	2022/05/03
3	Ahn, Don B., MD	TRUE	2022/03/17	2022/03/17
4	American Pacific Medical Group Inc	TRUE	2022/03/17	2022/03/17
5	Andrey Petrikovets MD APC	TRUE	2022/03/17	2022/03/17
6	AppleCare Hospitalist Medical Group Inc	TRUE	2022/03/17	2022/03/17
7	Asciuto, Thomas J MD Corporation	TRUE	2022/03/17	2022/03/17
8	Beach Specialty Medical Group	TRUE	2022/03/17	2022/03/17
9	Bell - Clinica Familiar Medical Corporation	TRUE	2022/03/17	2022/03/17
10	Bridges, Duane MD	TRUE	2022/03/17	2022/03/17
11	California Surgery Specialists Inc	TRUE	2022/03/17	2022/03/17
12	Cardio Vascular Health and Nutrition	TRUE	2022/03/17	2022/03/17
13	Carrillo-Nunez, Ignacio MD; PC	TRUE	2022/03/17	2022/03/17
14	Central County Chest Medical Group, Inc	TRUE	2022/03/17	2022/03/17
15	Chambers, Gregory MD Inc	TRUE	2022/03/17	2022/03/17
16	Channell Family Medical Group, Inc	TRUE	2022/03/17	2022/03/17
17	Chen, Hsiao Fen MD Inc	TRUE	2022/03/17	2022/03/17
18	Children's Gastroenterology MCSG	TRUE	2022/03/17	2022/03/17
19	Christensen, Roger A Inc	TRUE	2022/03/17	2022/03/17
20	CIVH & RANCHO HEART	TRUE	2022/03/17	2022/03/17
21	Coats, Melvin W. MD	TRUE	2022/03/17	2022/03/17
91	Company 2 added via API	TRUE	2022/03/18	2022/03/18
92	Company 5 added via API	TRUE	2022/03/19	1970/01/01

Figure: 42.2 Downloaded Excel Sheet**Filter Options**

There will be the following filter options to filter the user list:

- All: This filter section will allow Admin to view All “Active, In-Active & Deleted Company Name” list.
- Active: This filter section will allow Admin to view All “Active Company Name” list.
- In-active: This filter section will allow Admin to view All “In-Active Company Name” list.

4.1.10. Group**4.1.10.1. Add Group**

This page will appear from left navigation (Group -> Add Group). This page can be accessed by Admin or users who have sub-admin extra permission. The fields marked with (*) are mandatory fields.

This page will have following fields:

- Name
- Status (Active/Inactive)
- Select Company (2nd Section)

Admin will Add Group by entering the “Name” in the 1st section page as shown below in Figure: 48.1.

The screenshot shows a 'Add Group' form. At the top, there are two circular labels: '1' over 'Group' and '2' over 'Company'. Below these are two radio buttons: one checked (red dot) labeled 'Active' and one uncheckable (white dot) labeled 'In-Active'. At the bottom are two buttons: 'Cancel' (blue) and 'Next and Group Save' (grey).

Figure: 48.1 Add New Group 1st Section – Name

After successfully Adding Group Name, admin will be redirected to the 2nd Section “Select Company” where admin will be able to select the company from “Existing List of Companies” List as shown below in Figure: 48.2.

After successfully Adding New group to the selected company, User will be redirected to “Group List.”

The screenshot shows the same 'Add Group' form, but the 'Select Company*' field is now active, with a dropdown menu open. The menu contains several company names: 'Access Primary Care Physicians, Inc.', 'Advanced Dermatology Care Center', 'Ahn, Don B., MD', 'American Pacific Medical Group Inc.', and 'Andrey Petrikovets MD APC'. The dropdown menu is labeled 'Select Company'.

Figure: 48.2 Add Group 2nd Section - Select Company

If any validation error message appears on the screen, then admin will remain on the “Add Group” page or else admin will be redirected to the “Group list.”

Duplicate Group name check

Group name should be unique. If Admin adds name which already exists, then validation message will appear there.

After Successfully Adding the Group, User will receive a “Successfully Added” pop-up notification & record will get reflected under the “Group List” section.

4.1.10.2. Group List [Columns: Name, Company, Status, Action]

After selecting the “Group” option from the Left Navigation Bar, the system will allow the admin to view the Group Information in the “Group List” menu as shown below in figure: 44. This page will appear from left navigation (Group -> Group List)

Action	Name	Company	Enabled
<input checked="" type="checkbox"/>	Badday, Hasa		Active
<input checked="" type="checkbox"/>	CA Inst Cardio Health		Active
<input checked="" type="checkbox"/>	Central County Chest Medical Group Inc		Active
<input checked="" type="checkbox"/>	Daswani, Moti		Active
<input checked="" type="checkbox"/>	Nga, Visal		Active
<input checked="" type="checkbox"/>	Prohealth	Prohealth Partners A Medical Group Inc	Active
<input checked="" type="checkbox"/>	San Bartolome, Mario		Active
<input checked="" type="checkbox"/>	Shah, Anoop		Active
<input checked="" type="checkbox"/>	St Francis MultiSpecialty Grp		Active
<input checked="" type="checkbox"/>	Vascular and General Surgery Associates		Active

- Company: Company’s Name under which Group is added will be displayed under this column.
- Status: Group’s Active/In-Active Status will be displayed under this column.
- Action: The Action menu will provide following functionalities:
 - Status: Selecting this checkbox will allow Admin to set “Active” status & Deselecting this Checkbox will set “In-Active” status for the selected Group Type as shown below in Figure: 45.

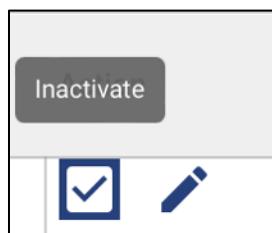


Figure: 45 Active/In-Active Checkbox – Action

- Edit: Selecting “Edit” Icon as shown below in Figure:46.1 will allow Admin to Edit/Update the information of the selected Group: Name can be updated and Select Company from Drop down list as shown below in Figure 46.2 & 46.3.

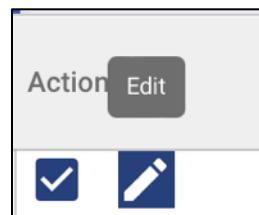


Figure: 46.1 Edit Group – Action

The form is titled "Update Group". It has two main sections: "Group" and "Company". The "Group" section contains a red必填字段提示 "Name*" and a text input field containing "Badday". The "Company" section is currently empty. At the bottom are two buttons: "Cancel" and "Next and Group Save".

Figure: 46.2 Update/Edit Group 1st section – Name

After Adding the “Group Name” in 1st section as shown in Figure 46.2, User needs to click on “Next and Group Save” to confirm the changes & will be redirected to 2nd section “Select Company” as shown below in Figure:46.3.

If User clicks on “Cancel” option for any changes made will be discarded.

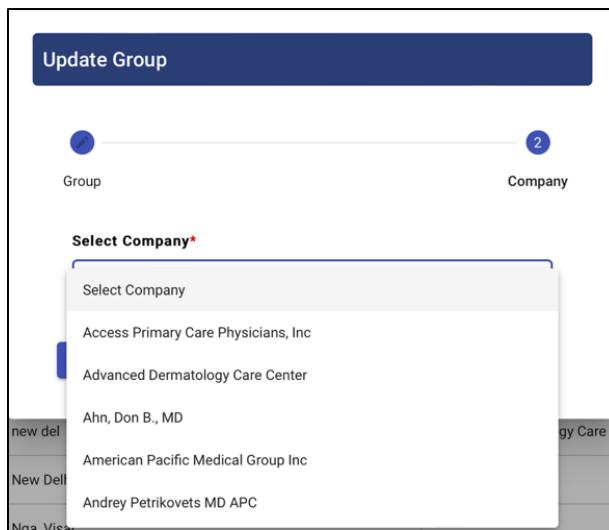


Figure: 46.3 Update/Edit Group 2nd Section – Select Company

After Editing/Updating the Group Name & Selecting existing Company details, User needs to click on “Add” to confirm the changes & if User clicks on “Cancel” option for any changes made will be discarded.

Searching [Criteria: Keyword (name), Company, Status]

Excel Sheet Report: Admin needs to select the “Excel” Option available on the top right corner of the “Group List” menu as shown below in Figure:47.1 , which will allow Admin to download the “Group List” sheet in Excel format.

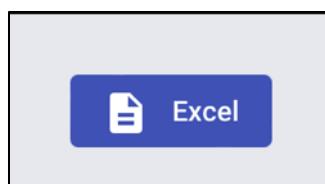


Figure: 47.1 Excel Sheet Download Button

ID	Name	Enabled	Created On	Modified On
653	a	TRUE	2023/05/01	1970/01/01
200	Badday,	TRUE	1970/01/01	2023/04/17
173	CA Inst Cardio Health	TRUE	1970/01/01	1970/01/01
590	Central County Chest Medical Group Inc	TRUE	1970/01/01	1970/01/01
71	Daswani, Moti	TRUE	1970/01/01	1970/01/01
644	Genuine	TRUE	2023/04/11	1970/01/01
649	kjhkj	TRUE	2023/04/11	1970/01/01
647	new del	TRUE	2023/04/11	2023/04/11
645	New Delhi Hospital	TRUE	2023/04/11	2023/04/11
652	new g tes	TRUE	2023/04/19	2023/04/19
520	Nga, Visal	TRUE	1970/01/01	1970/01/01
1	Prohealth	TRUE	2022/03/17	2022/04/29
651	r	TRUE	2023/04/17	1970/01/01
650	rah J	TRUE	2023/04/11	2023/04/11
646	rahul jawa	TRUE	2023/04/11	2023/04/11
265	San Bartolome, Mario	TRUE	1970/01/01	1970/01/01
106	Shah, Anoop	TRUE	1970/01/01	1970/01/01
232	St Francis MultiSpecialty Grp	TRUE	1970/01/01	1970/01/01
648	test delhi	TRUE	2023/04/11	2023/04/11
643	Vascular and General Surgery Associates	TRUE	1970/01/01	1970/01/01

Figure: 47.2 Group Excel Sheet

Filter Options

There will be the following filter options to filter the user list:

- All: This filter section will allow Admin to view All “Active, Inactive & Deleted” list.
- Active: This filter section will allow Admin to view All “Active Group” list, deleted users will not appear in the list.
- In-active: This filter section will allow Admin to view All “In-Active Group” list.

4.1.11. Doctor

4.1.11.1. Add Doctor

This page will appear from left navigation bar (Doctors -> Add Doctor) or from doctor list page. This page can be accessed by the admin or users who have sub-admin extra permission for payment, charge batch and Cash log system. The fields marked with (*) are mandatory fields.

This page will have following fields:

- Name

- Company Name
- Parent Doctor/Group
- Doctor Code/cost center number
- Accounting (Appear only to admin and “Accounting” department’s user who has sub-admin permission)
- Payments (Appear only to admin and “Accounting” department’s user who has sub-admin permission)
- Operations (Appear only to admin and “Accounting” department’s user who has sub-admin permission)

If any validation error message appears on the screen, then admin will remain on the “Add Doctor” page else he will be redirected to “Doctor list” page with success message.

Figure: 53 Add doctor

If any validation error message appears on the screen, then admin will remain on the “Add Doctor” page else he will be redirected to “Doctor list” page with success message.

Duplicate doctor check on doctor name

Doctor name should be unique in a group. If admin adds a doctor or group which is already in database, then validation message will appear there.

We need to check that duplicate doctor with doctor name and group name. The same doctor name can exist in other group also.

After Successfully Adding the Doctor, User will receive a “Successfully Added” pop-up notification & record will get reflected under the “Doctor List” section.

4.1.11.2. List doctor [Columns: Name, Group Name, Company Name, Code, Status, Action]

After selecting the “Doctor” option from the Left Navigation Bar, the system will allow the admin to view the Doctor’s Information in the “Doctor List” menu as shown below in figure: 34. This page will appear from left navigation (Doctor -> Doctor List).

Action	Doctor	Group Name	Company Name	Code	Enabled
<input checked="" type="checkbox"/>	Abary, Alexander		Access Primary Care Physicians, Inc	11	Active
<input checked="" type="checkbox"/>	Abbasi, Abdul	Prohealth	Prohealth Partners A Medical Group Inc	4820	Active
<input checked="" type="checkbox"/>	ABIC	San Bartolome, Mario	Prohealth Partners A Medical Group Inc	3000	Active
<input checked="" type="checkbox"/>	Absoshady in Patient Services				Active
<input checked="" type="checkbox"/>	Absoshady, Moustafa	Prohealth	Prohealth Partners A Medical Group Inc	4895	Active
<input checked="" type="checkbox"/>	Access PCPInc		Access Primary Care Physicians, Inc		Active
<input checked="" type="checkbox"/>	Adams, John	Prohealth	Prohealth Partners A Medical Group Inc	4266	Active
<input checked="" type="checkbox"/>	adrian	Prohealth	Access Primary Care Physicians, Inc	00	Active
<input checked="" type="checkbox"/>	Advanced Dermatology Care Center				Active
<input checked="" type="checkbox"/>	Ahn, Don	RBDE, Professional Medical Corp		4260	Active

Figure: 49 Doctors List

The Doctor’s list will have following columns:

- Name: Doctor’s Name will be displayed under this column.
- Group name: Doctor’s Group Name will be displayed under this column.

- Company Name: Doctor's Company Name will be displayed under this column.
- Enabled: Doctor's Active/Inactive Status will be displayed under this column.
- Doctor code: Doctor's Code will be displayed under this column.
- Action: The Action menu will provide following functionalities:
 - Selecting this checkbox will allow Admin to set "Active" status & Deselecting this Checkbox will set "In-Active" status for the selected Doctor as shown below in Figure: 50.

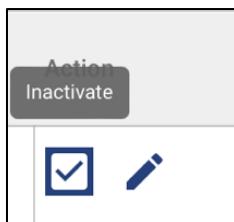


Figure: 49 Active/In-Active Status – Action

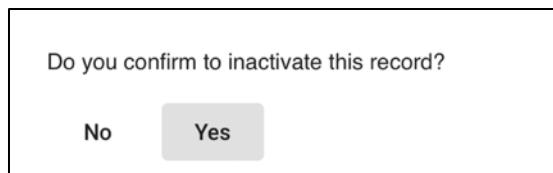


Figure:1 Active/In-Active Status Confirmation

Also, on click of Active/In-Active Status Check Box a confirmation Pop-up will appear on the screen. Where user will be allowed to select "Yes" to confirm the Active/Inactive state or "No" to discard as shown below in Figure: 20.1.

- Edit: Selecting "Edit" Icon as shown in below figure:50.1 will allow Admin to Edit/Update the information of the selected Doctor: Name, Company Name, Parent Doctor/Group Name, Code, Accounting, Payment, Operation, non-deposit (True/False) & Active/In-Active can be updated as shown below in figure: 50.2.



Figure: 50.1 Edit Option – Action

Name*	Abary, Alexander
Company Name	Access Primary Care Physicians, Inc
Select Parent Doctor / Group Name	rah J
Code	Enter Code
Accounting	0
Payment	0.01
Operation	0
Non Deposit?*	<input checked="" type="radio"/> True <input type="radio"/> False
Enabled?*	<input checked="" type="radio"/> Active <input type="radio"/> In-Active

Figure: 50.2 Edit/Update Doctor– Action

After Editing/Updating the Doctor List, User needs to click on “Update” to confirm the changes & if User clicks on “Cancel” option for any changes made will be discarded.

Searching [Criteria: Keyword (name)]

Keyword search will search in doctor name column.

Sorting [Criteria: name, doctor code]

The default list will be sorted on doctor name. Admin can sort list on name and doctor code.

The doctor code will appear to admin and accounting department user who have permission as sub-admin.

Excel Sheet Report: Admin needs to select the “Excel” Option as available on the top right corner of the “Doctor List” menu, which will allow Admin to download the “Doctor List” sheet in Excel format.

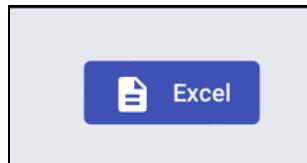


Figure: 52.1 Excel Sheet Option

A	B	C	D	E	F	G	H	I	J	K	L	M	N
ID	Parent Id	Name	Code	Payments	Operations	Accounting	Non Deposit	Enabled	Deleted	Group Name	Company Name	Created On	Modified On
260		Abary, Alexander		0.01	0	0	TRUE	TRUE	FALSE	rah J	Access Primary Care Physicians, Inc	2015/12/01	2023/04/28
159	1	Abbas, Abdul	4820	0.01	0	0	FALSE	TRUE	FALSE	Prohealth	Prohealth Partners A Medical Group Inc	2013/10/10	1970/01/01
2	1	ABC	3000	0.01	0	0	FALSE	TRUE	FALSE	Prohealth	Prohealth Partners A Medical Group Inc	2013/08/06	1970/01/01
353		Aboshady in Patient Services		0.01	0	0	TRUE	TRUE	FALSE			2017/10/27	1970/01/01
221	1	Aboshady, Moustafa	4895	0.01	0	0	FALSE	TRUE	FALSE	Prohealth	Prohealth Partners A Medical Group Inc	2015/04/28	1970/01/01
434		Access PCP,Inc		0.01	0	0	FALSE	TRUE	FALSE			2018/12/28	1970/01/01
357	1	Adams, John	4266	0.01	0	0	FALSE	TRUE	FALSE	Prohealth	Prohealth Partners A Medical Group Inc	2017/11/21	2018/08/31
62		Advanced Dermatology Care Center		0	0	0	TRUE	TRUE	FALSE			2013/08/06	2014/03/20
345	1	Ahn, Don	4260	0.01	0	0	FALSE	TRUE	FALSE	Prohealth	Prohealth Partners A Medical Group Inc	2017/09/20	2020/10/09
414		Ahn, Don		0.01	0	0	FALSE	TRUE	FALSE			2018/09/17	1970/01/01
307	1	Ahn, Duke	3375	0.01	0	0	FALSE	TRUE	FALSE	Prohealth	Prohealth Partners A Medical Group Inc	2016/09/29	1970/01/01
3	1	AIM	3050	0.01	0	0	FALSE	TRUE	FALSE	Prohealth	Prohealth Partners A Medical Group Inc	2013/08/06	1970/01/01
4	1	AIM Psych	3680	0.01	0	0	FALSE	TRUE	FALSE	Prohealth	Prohealth Partners A Medical Group Inc	2013/08/06	2013/11/04
147	1	AIM-LA	3050	0.01	0	0	FALSE	TRUE	FALSE	Prohealth	Prohealth Partners A Medical Group Inc	2013/10/01	2018/08/31
146	1	AIM-LB	3030	0.01	0	0	FALSE	TRUE	FALSE	Prohealth	Prohealth Partners A Medical Group Inc	2013/10/01	2013/10/01
685	1	Alyegbusi, Modupe	4540	0.01	0	0	FALSE	TRUE	FALSE	Prohealth	Prohealth Partners A Medical Group Inc	2023/02/01	2023/02/08
397	1	Allie, Tina		0.01	0	0	FALSE	TRUE	FALSE	Prohealth	Prohealth Partners A Medical Group Inc	2018/06/01	1970/01/01
373	1	Allswang, Barry S	3050	0.01	0	0	FALSE	TRUE	FALSE	Prohealth	Prohealth Partners A Medical Group Inc	2018/02/21	2020/10/09
63		American Pacific Med Grp	6690	0	0	0	FALSE	TRUE	FALSE			2013/08/06	2013/11/05
207		Anthony (KCI)		0.01	0	0	FALSE	TRUE	FALSE			2014/11/03	1970/01/01

Figure: 52.1 Doctor Excel Sheet

Filter Options

There will be the following filter options to filter the user list:

- All: This filter section will allow Admin to view All “Active, In-Active & Deleted Doctor’s” list.
- Active: This filter section will allow Admin to view All “Active Doctor’s” list.
- In-active: This filter section will allow Admin to view All “In-Active Doctor’s” list.

- View Only: This filter section will Admin to “View Only” All the Active, In-Active & Deleted Doctor’s List.

4.1.12. Email template management

4.1.12.1. List email template [Columns: Name, Type, Status, Action]

After selecting the “Email Template” option from the Left Navigation Bar, the system will allow the admin to view the Email Template Information in the “Email Template List” menu as shown below in figure: 54. This page will appear from left navigation (Email Template -> Email Template List)

Action	Name	Status	Type
<input type="checkbox"/>	ArgusCore Registration Email	In-Active	
<input checked="" type="checkbox"/>	ArgusCore Password Changed successfullyOn3March	Active	
<input checked="" type="checkbox"/>	ArgusCore Password Recovery	Active	
<input checked="" type="checkbox"/>	ArgusCore Process Manual Update Alerts system email	Active	Subscription Email
<input checked="" type="checkbox"/>	ArgusCore Notification on Trainee Evaluation	Active	Subscription Email

Figure: 54 Email Template List

This page will appear from left navigation (Email template -> email template list). This list will have following columns:

- Name: Name of the Email Template will be displayed under this Column.
- Type: Type of the Email Template will be displayed under this Column.
- Status: Email Template’s Active/In-Active Status will be displayed under this Column.
- Action: The Action menu will provide following functionalities:
 - Status: Selecting this checkbox will allow Admin to set “Active” status & Deselecting this Checkbox will set “In-Active” status for the selected Email Template as shown below in Figure: 54.

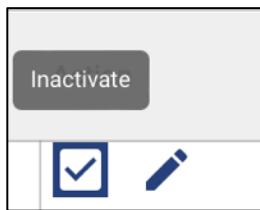


Figure: 54 Active/In-Active Checkbox – Action

- Edit: Selecting “Edit” Icon as shown below in Figure: 55.1 will allow Admin to Edit/Update the information of the selected Email Template as shown in below Figure: 55.2.

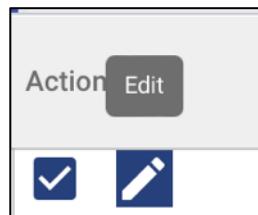


Figure: 55.1 Edit Email Template Icon – Action

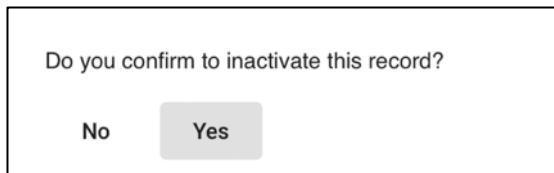


Figure: 55.2 Confirmation Dialog Box

Also, on click of Active/In-Active Status Check Box a confirmation Pop-up will appear on the screen. Where user will be allowed to select “Yes” to confirm the Active/Inactive state or “No” to discard as shown below in Figure: 20.1.

The following options will appear on email template edit page:

- Name
- Content
- Status (Active/inactive)

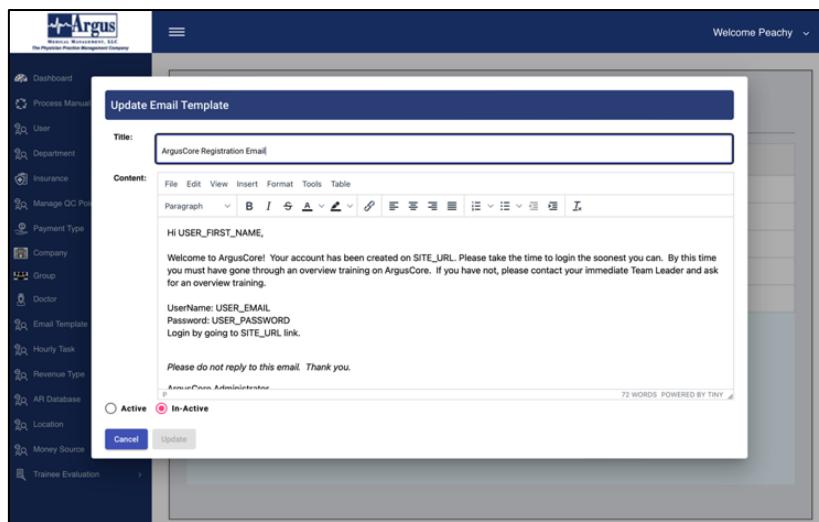


Figure: 55.2 Edit Email Template

After Editing/Updating the Email Template, User needs to click on “Update” to confirm the changes & if User clicks on “Cancel” option for any changes made will be discarded.

“Subscription Email” will appear on “User add/edit” and “My profile” pages. From where admin/user can manage subscription emails for that account.

Searching [Criteria: Filter (Name)]

Keyword search will perform search in name column.

Sorting [Criteria: Name, type]

The name, type and status column can be sort.

4.1.13. Hourly Task

4.1.13.1. Add Hourly Task

This page will appear from left navigation bar (Hourly Task-> Add Hourly Task) as shown below in Figure: 60. This page can be accessed by the admin or users who have sub-admin extra permission. The fields marked with (*) are mandatory fields.

This page will have following fields:

- Name
- Select Department: User will be able to view the list of existing “Departments” in drop down menu, which allow user to Add Hourly Task to the selected Department.
- Description
- Chargeable/Not chargeable
- Status (Active/In-Active)

Add Hourly Task

Name*	<input type="text" value="Enter Name"/>
Department*	<input type="text" value="Select Department"/>
Description	<input type="text" value="Enter Description"/>
Chargeable?*	<input type="radio"/> Chargeable <input checked="" type="radio"/> Not Chargeable
Enabled?	<input checked="" type="radio"/> Active <input type="radio"/> In-Active
<input type="button" value="Cancel"/> <input type="button" value="Add"/>	

Figure: 60 Add Hourly Task

If any validation error message appears on the screen, then admin will remain on the “Add Hourly Task” page else he will be redirected to “Hourly Task list” page with success message.

Duplicate Task check on Hourly Task Name

Hourly Task Name should be unique If admin adds a task which is already in database, then validation message will appear there.

After Successfully Adding the Hourly Task, User will receive a “Successfully Added” pop-up notification & record will get reflected under the “Hourly Task List” section.

4.1.13.2. Hourly Task List [Columns: Name, Description, Chargeable, Department, Edit]

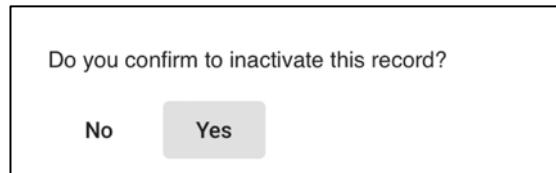
After selecting the “Hourly Task” option from the Left Navigation Bar, the system will allow the admin to view the Hourly Task Information in the “Hourly Task List” menu as shown below in figure: 56. This page will appear from left navigation (Hourly Task -> Hourly Task List)

Action	Task Name	Description	Chargeable	Department	Enabled
<input checked="" type="checkbox"/>	Working Medicare_Medical Offset		Chargeable		Active
<input checked="" type="checkbox"/>	Working CT Suspense		Chargeable		Active
<input checked="" type="checkbox"/>	Working CT Credits		Chargeable		Active
<input checked="" type="checkbox"/>	Updating Office Ally Reports		Chargeable		Active
<input checked="" type="checkbox"/>	Updating Elec Clm Batch		Chargeable		Active
<input checked="" type="checkbox"/>	Total Balancing		Chargeable		Active
<input checked="" type="checkbox"/>	TestTask1111	test task	Chargeable		Active
<input checked="" type="checkbox"/>	TestTask patch	test task	Chargeable		Active
<input checked="" type="checkbox"/>	SuperBill Project		Chargeable		Active
<input checked="" type="checkbox"/>	Scanned ACH-Prohealth-Argus Clients Batches-CasPro Online		Chargeable		Active

Figure: 56 Hourly Task List

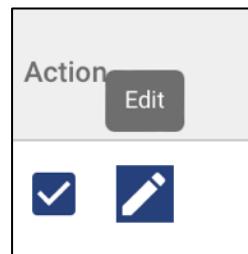
Hourly Task list will have following columns:

- Name: Name of the Tasks will be displayed under this Column.
- Description: Description of the Tasks will be displayed under this Column.
- Chargeable: Tasks are Chargeable/Not Chargeable will be displayed under this Column.
- Department: Departments of the Tasks will be displayed under this Column.
- Action: The Action menu will provide following functionalities:
 - Status: Selecting this checkbox will allow Admin to set “Active” status & Deselecting this Checkbox will set “In-Active” status for the selected Hourly Task as shown below in Figure: 57

**Figure: 57 Active/In-Active Checkbox – Action****Figure:1 Active/In-Active Status Confirmation**

Also, on click of Active/In-Active Status Check Box a confirmation Pop-up will appear on the screen. Where user will be allowed to select “Yes” to confirm the Active/Inactive state or “No” to discard as shown below in Figure: 20.1.

- Edit: Selecting “Edit” Icon as shown below in Figure: 58.1 will allow Admin to Edit/Update the information of the selected Hourly Task like: Name, Department, Description, Chargeable/Not chargeable & Active/inactive status as shown below in Figure:..

**Figure: 58 Edit Icon – Action**

Update Hourly Task

Name*
Working Medicare_Medical Offset

Department*

Description
Enter Description

Chargeable?* Chargeable Not Chargeable
Enabled? Active In-Active

Figure: 8. Edit Icon – Action

After Editing/Updating the Hourly Task , User needs to click on “Update” to confirm the changes & if User clicks on “Cancel” option for any changes made will be discarded.

Searching [Criteria: Keyword (name), Department, Chargeable/Not Chargeable]

Excel Sheet Report: Admin needs to select the “Excel” Option as available on the top right corner of the “Hourly Task List” menu, which will allow Admin to download the “Hourly Task List” sheet in Excel format.

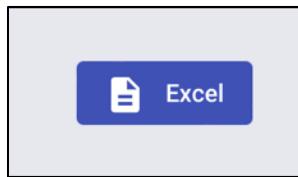


Figure: 52.1 Excel Sheet Option

ID	Name	Description	Department Name	Created On	Modified On
1	Releasing Hold Claims		Coding and Charge Entry Department	1970/01/01	2023/05/26
2	Clearing CM Edits		Coding and Charge Entry Department	1970/01/01	1970/01/01
3	Coding Correction Log,Rekey Log		Coding and Charge Entry Department	1970/01/01	1970/01/01
4	Rejection Sending To Office		Coding and Charge Entry Department	1970/01/01	1970/01/01
5	Coding QA on behalf of Argus		Coding and Charge Entry Department	1970/01/01	1970/01/01
6	SuperBill Project			1970/01/01	1970/01/01
7	HCC Project			1970/01/01	1970/01/01
8	ICD-10 Map Manager			1970/01/01	1970/01/01
9	Coding Queries			1970/01/01	1970/01/01
10	Dialysis Log			1970/01/01	1970/01/01
11	Fee Addition in CT			1970/01/01	1970/01/01
12	Coding Validation,Coding Issue Log			1970/01/01	1970/01/01
13	Office Ally Hours			1970/01/01	1970/01/01
15	Charge-Demo QAA	test	Accounts Receivable Department	1970/01/01	2023/02/23

Figure: 52.1 Hourly Task Excel Sheet

4.1.14. Revenue Types

4.1.14.1. Add revenue type

This page will appear from left navigation bar (revenue types -> Add revenue type) or from revenue type list page. This page can be accessed by the admin or users who have sub-admin extra permission for accounting department. The fields marked with (*) are mandatory fields.

This page will have following fields:

- Name
- Code
- Accounting
- Payment
- Operation
- Description
- Active/Inactive

The screenshot shows a web-based form titled 'Add Revenue Type'. The form contains the following fields:

- Name***: An input field with placeholder text 'Enter Name'.
- Code**: An input field with placeholder text 'Enter Code'.
- Accounting**: A numeric input field with value '0'.
- Payment**: A numeric input field with value '0.01'.
- Operation**: A numeric input field with value '0'.
- Description**: A text area with placeholder text 'Enter Description'.
- Status**: A radio button group with two options: 'Active' (selected) and 'In-Active'.
- Buttons**: Two buttons at the bottom: 'Cancel' (blue) and 'Add' (grey).

Figure: 64 Add revenue type

If any validation error message appears on the screen, then admin will remain on the “Add revenue type” page else admin will be redirected to the “Revenue type list” page with success message.

Duplicate revenue type check on name

Revenue type name should be unique else validation message will appear when admin save the page.

After Successfully Adding the Revenue, User will receive a “Successfully Added” pop-up notification.

4.1.14.2. List revenue types [Columns: Name, description, Action]

After selecting the “Revenue Type” option from the Left Navigation Bar, the system will allow the admin to view the Revenue Type Information in the “Revenue Type List” menu as shown below in figure: 61. This page will appear from left navigation (Revenue Type -> Revenue Type List)

Action	Revenue Type Name	Code	Description
<input checked="" type="checkbox"/>	Argus Billing Invoice	2040	argus billing
<input checked="" type="checkbox"/>	BioLife.Bergamet	3420	
<input checked="" type="checkbox"/>	CareMore Admin Income	3355	
<input checked="" type="checkbox"/>	CT Fees	0000	
<input checked="" type="checkbox"/>	Directorship	3410	
<input checked="" type="checkbox"/>	Healthcare Partners Bonus	3330	
<input checked="" type="checkbox"/>	IPA Bonus	3380	
<input checked="" type="checkbox"/>	Med Legal	3390	
<input checked="" type="checkbox"/>	Medicare Incentive	3110	
<input checked="" type="checkbox"/>	Old AR	3490	

Figure: 61 Revenue Type List

The searchable list will have following columns:

- Revenue type name: Name of the Revenue Types will be displayed under this Column.
- Code: Code No. of the Revenue Type will be displayed under this Column
- Description: Description of the Revenue Type will be displayed under this Column
- Action: The Action menu will provide following functionalities:
 - Status: Selecting this checkbox will allow Admin to set “Active” status & Deselecting this Checkbox will set “In-Active” status for the selected Revenue Type as shown below in Figure: 57

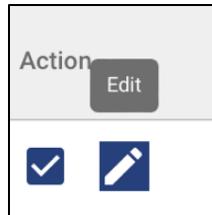


Figure: 62 Active/In-Active Checkbox – Action

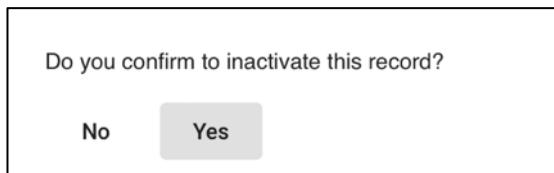


Figure:1 Active/In-Active Status Confirmation

Also, on click of Active/In-Active Status Check Box a confirmation Pop-up will appear on the screen. Where user will be allowed to select “Yes” to confirm the Active/Inactive state or “No” to discard as shown below in Figure: 20.1.

- Edit: Selecting “Edit” Icon as shown below in Figure: 58.1 will allow Admin to Edit/Update the information of the selected Revenue Type. Admin will be able to update: Name, Code, Accounting, Payment,

Operation, Description & Active/In-Active can be updated as shown below in figure: 63.2.

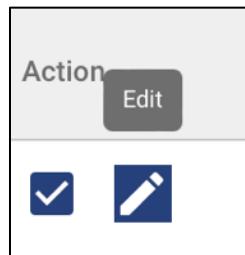


Figure: 63.1 Edit Icon – Action

Update Revenue Type	
Name*	Argus Billing Invoice
Code	2040
Accounting	0
Payment	0
Operation	0
Description	argus billing
<input checked="" type="radio"/> Active <input type="radio"/> In-Active	
<input type="button" value="Cancel"/> <input type="button" value="Update"/>	

Figure: 63.2 Edit/Update Revenue Type– Action

After Editing/Updating the Revenue Type, User needs to click on “Update” to confirm the changes & if User clicks on “Cancel” option for any changes made will be discarded.

Searching [Criteria: Keyword (name)]

There will be keyword search which will work on name column.

Sorting [Criteria: name]

By default, the list will sort on name.

Feed data for revenue types

- Argus Billing Invoice
- BioLife, Bergamet
- CareMore Admin Income
- CT Fees
- Directorship
- Healthcare Partners (HCP) Bonus
- IPA Bonus
- Med Legal
- Medicare Incentive
- Old AR
- PMN-Annual Fee
- PMN- Initial Membership
- PMN- Misc. Credentialing Work
- PMN- Risk Mgmt.
- Other

Excel Sheet Report: Admin needs to select the “Excel” Option as available on the top right corner of the “Revenue Type List” menu, which will allow Admin to download the “Revenue Type List” sheet in Excel format.

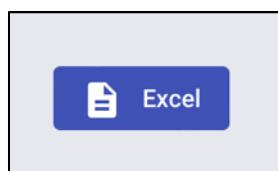


Figure: 52.1 Excel Sheet Option

ID	Name	Description	Code	Accounting	Operations	Payments	Enabled
1	PMN- Risk Mgmt		1510	0	0	0	Active
3	PMN- Misc Credentialing Work		1510	0	0	0	Active
4	PMN- Initial Membership		1510	0	0	0	Active
6	PMN- Annual Fee		1510	0	0	0	Active
7	Medicare Incentive		3110	0	0	0.01	Active
8	Healthcare Partners Bonus		3330	0	0	0.01	Active
9	CareMore Admin Income		3355	0	0	0.01	Active
10	IPA Bonus		3380	0	0	0.01	Active
13	Directorship		3410	0	0	0.01	Active
15	Other		3420	0	0	0.01	Active
21	BioLife,Bergamet		3420	0	0	0.01	Active
22	Old AR		3490	0	0	0.01	Active
26	Argus Billing Invoice	argus billing	2040	0	0	0	Active
27	CT Fees		0000	0	0	0	Active
31	Med Legal		3390	0	0	0.01	Active

Figure: 52.1 Hourly Task Excel Sheet

4.1.15. AR Database

4.1.15.1. Add AR Database

This page will appear from left navigation (AR Database-> Add AR Database) as shown below in Figure: 69. This page can be accessed by Admin or users who have sub-admin extra permission.

This page will have following fields:

- Name
- Description
- (True/False)/ Active/In-Active

The screenshot shows a modal dialog titled "Add AR Database". It has three text input fields: "Name" (empty), "Description" (empty), and a "Status" section with two radio buttons: "True" (selected) and "False". At the bottom are "Cancel" and "Add" buttons.

Figure 69: Add AR Database

If any validation error message appears on the screen, then admin will remain on the “Add AR Database” page or else admin will be redirected to the “AR Database List” page with success message.

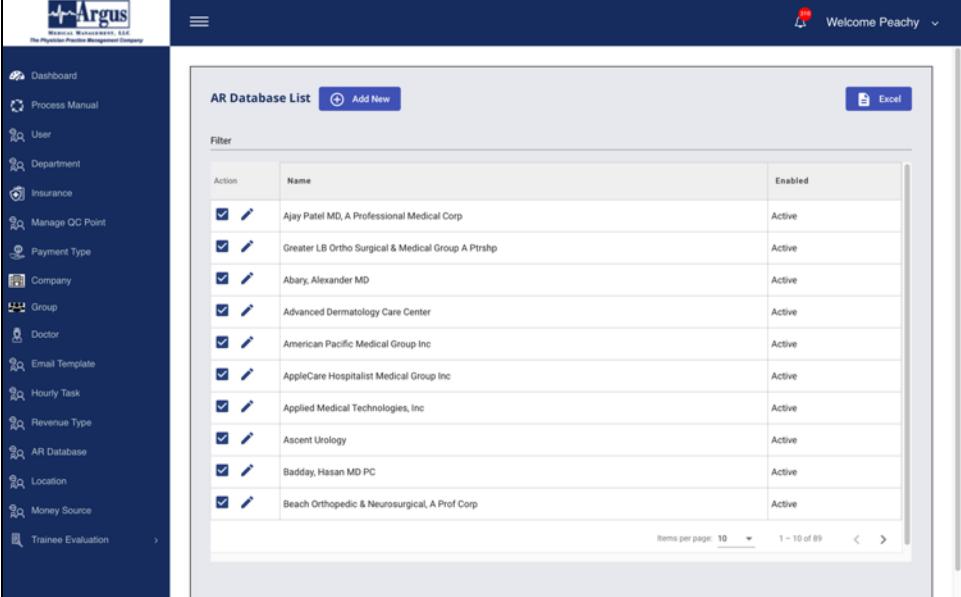
Duplicate AR Database check on name

AR Database type name should be unique else validation message will appear when admin save the page.

After Successfully Adding the AR Database, User will receive a “Successfully Added” pop-up notification & record will get reflected under the “AR Database List” section.

4.1.15.2. AR Database List [Columns: Name, Status, Action]

After selecting the “AR Database” option from the Left Navigation Bar, the system will allow the admin to view the AR Database Information in the “AR Database List” menu as shown below in figure 65: This page will appear from left navigation (AR Database -> AR Database List)



Action	Name	Enabled
<input checked="" type="checkbox"/>	Ajay Patel MD, A Professional Medical Corp	Active
<input checked="" type="checkbox"/>	Greater LB Ortho Surgical & Medical Group A Ptlshp	Active
<input checked="" type="checkbox"/>	Abary, Alexander MD	Active
<input checked="" type="checkbox"/>	Advanced Dermatology Care Center	Active
<input checked="" type="checkbox"/>	American Pacific Medical Group Inc	Active
<input checked="" type="checkbox"/>	AppleCare Hospitalist Medical Group Inc	Active
<input checked="" type="checkbox"/>	Applied Medical Technologies, Inc	Active
<input checked="" type="checkbox"/>	Ascent Urology	Active
<input checked="" type="checkbox"/>	Badday, Hasan MD PC	Active
<input checked="" type="checkbox"/>	Beach Orthopedic & Neurosurgical, A Prof Corp	Active

Figure 65: AR Database List

AR Database list will have following columns:

- Name: Name of the AR Database will be displayed under this Column.
- Status: Status of the AR Database will be displayed under this Column.
- Action: The Action menu will provide following functionalities:
 - Status: Selecting this checkbox will allow Admin to set “Active” status & Deselecting this Checkbox will set “In-Active” status for the selected AR Database as shown below in Figure 66:



Figure 66: Active/In-Active Checkbox – Action.

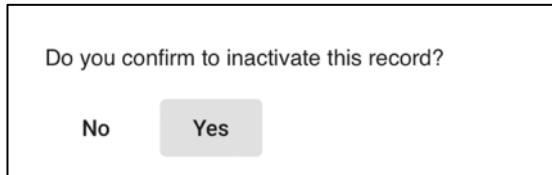


Figure.:1 Active/In-Active Status Confirmation

Also, on click of Active/In-Active Status Check Box a confirmation Pop-up will appear on the screen. Where user will be allowed to select “Yes” to confirm the Active/Inactive state or “No” to discard as shown below in Figure: 20.1.

- Edit: Selecting “Edit” Icon as shown below in Figure 67.1: will allow Admin to Edit/Update the information: Name & Description of the selected AR Database as shown below in Figure 67.2:

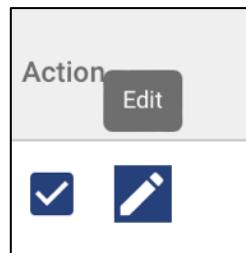


Figure 67.1: Edit Icon – Action.

Update Location

Name*

Description

Active In-Active

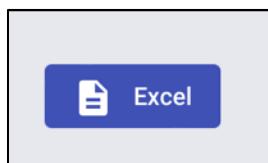
Cancel **Update**

Figure 67.2: Edit/Update AR Database

After Editing/Updating the AR Database, User needs to click on “Update” to confirm the changes & if User clicks on “Cancel” option for any changes made will be discarded.

Searching [Criteria: Keyword (name), Status]

Excel Sheet Report: Admin needs to select the “Excel” Option as available on the top right corner of the “AR Database List” menu, which will allow Admin to download the “AR Database List” sheet in Excel format.

**Figure: 52.1 Excel Sheet Option**

ID	Name	Description	Enabled
1	Prohealth Partners A Medical Group Inc		Active
2	Advanced Dermatology Care Center		Active
3	American Pacific Medical Group Inc		Active
5	AppleCare Hospitalist Medical Group Inc		Active
6	Applied Medical Technologies, Inc		Active
7	Beverly Family Care Center		Active
8	Bridges, Duane MD		Active
9	California Institute of Cardiovascular Health, Inc		Active
10	Chambers, Gregory MD Inc		Active
11	Chen, Hsiao Fen MD Inc		Active
12	Daswani, Moti S MD Inc		Active
13	Facey Medical Group Inc		Active
14	Faitlowicz, Ana R MD		Active
15	Faynsod, Moshe MD Inc		Active
16	Gastrointestinal Associates A Medical Group		Active
17	General Surgeons of Long Beach		Active

Figure: 52.1 Hourly Task Excel Sheet

4.1.16. Location

4.1.16.1. Add Location

This page will appear from left navigation (Location-> Add Location) as shown below in Figure 73: . This page can be accessed by Admin or users who have sub-admin extra permission. The fields marked with (*) are mandatory fields.

This page will have following fields:

- Name
- Description
- Status (Active/In-Active)

The screenshot shows a modal window titled "Add Location". It contains three text input fields: "Name*" with placeholder "Enter Name", "Description" with placeholder "Enter Description", and a radio button group for "Status" with "Active" selected. At the bottom are two buttons: "Cancel" and "Add".

Figure 73: Add Location

If any validation error message appears on the screen, then admin will remain on the “Add Location” page or else admin will be redirected to the “Location List” page with success message.

Duplicate Location type check on name

Location name should be unique else validation message will appear when admin save the page.

After Successfully Adding the Location, User will receive a “Successfully Added” pop-up notification & record will get reflected under the “Location List” section.

4.1.16.2. Location List [Columns: Name, Status, Action]

After selecting the “Location” option from the Left Navigation Bar, the system will allow the admin to view the Location Information in the “Location List” menu as shown below in figure 70: . This page will appear from left navigation (Location-> Location List)

Action	Name	Enabled
<input checked="" type="checkbox"/>	Anaheim General Hosp	Active
<input checked="" type="checkbox"/>	Anaheim Terrace Care Center LLC	Active
<input checked="" type="checkbox"/>	Artesia Home Training	Active
<input checked="" type="checkbox"/>	Atlantic Memorial HCC	Active
<input checked="" type="checkbox"/>	Avalon Villa Care Center	Active
<input checked="" type="checkbox"/>	Barlow Respiratory Hospital	Active
<input checked="" type="checkbox"/>	Bel Tooren Villa Convalescent Hospital	Active
<input checked="" type="checkbox"/>	Bel vista Healthcare Center	Active
<input checked="" type="checkbox"/>	Bellflower Medical Center	Active
<input checked="" type="checkbox"/>	Beverly Family Care Centre	Active

Figure 70: Location List

Location list will have following columns:

- Name: Name of the Locations will be Displayed under this Column.
- Status: Active/In-Active Status of the Locations will be Displayed under this Column.
- Action: The Action menu will provide following functionalities:
 - Status: Selecting this checkbox will allow Admin to set “Active” status & Deselecting this Checkbox will set “In-Active” status for the selected Location as shown below in Figure: 71.



Figure 71: Active/In-Active Checkbox – Action.

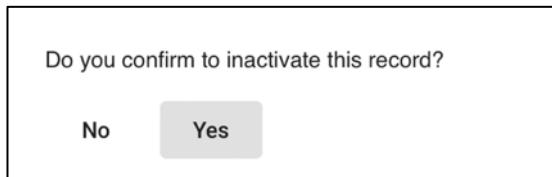


Figure 20.1 Active/In-Active Status Confirmation

Also, on click of Active/In-Active Status Check Box a confirmation Pop-up will appear on the screen. Where user will be allowed to select “Yes” to confirm the Active/Inactive state or “No” to discard as shown below in Figure: 20.1.

- Edit: Selecting “Edit” Icon as shown below in Figure: 71.1 will allow Admin to Edit/Update the information: Name, Description and Active/In-Active of the selected Location as shown in below Figure: 71.2.



Figure 71.1: Edit Icon – Action.

The form is titled "Update Location". It contains fields for "Name*" and "Description", both with placeholder text "Enter Name" and "Enter Description" respectively. Below these is a radio button group for "Active" and "In-Active" status. At the bottom are "Cancel" and "Update" buttons.

Figure 71.2: Edit/Update Location– Action

After Editing/Updating the Location, User needs to click on “Update” to confirm the changes & if User clicks on “Cancel” option for any changes made will be discarded.

Searching [Criteria: Keyword (name), Status]

Excel Sheet Report: Admin needs to select the “Excel” Option as available on the top right corner of the “Location List” menu, which will allow Admin to download the “Location List” sheet in Excel format.

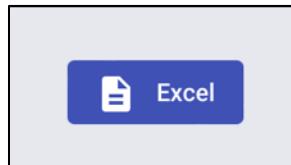


Figure: 52.1 Excel Sheet Option

ID	Name	Description	Enabled
1	Alamitos Belmont Rehab		Active
2	Alamitos West Convalescent	z dcd	Active
3	Anaheim General Hosp	v cxvf	Active
4	Anaheim Terrace Care Center LLC		Active
5	Artesia Home Training		Active
6	Atlantic Memorial HCC		Active
7	Barlow Respiratory Hospital		Active
8	Bel vista Healthcare Center		Active
9	Bellflower Medical Center		Active
10	Broadway by the Sea		Active
11	Buena Vista Care Center		Active
12	California Hospital Medical Center		Active
13	Coast Plaza Hospital		Active
14	College Medical Center - SNF		Active

Figure: 52.1 Location Excel Sheet

4.1.17. Money Source

4.1.17.1. Add Money Source

This page will appear from left navigation (Money Source-> Add Money Source) as shown below in Figure:78. This page can be accessed by Admin or users who have sub-admin extra permission. The fields marked with (*) are mandatory fields.

This page will have following fields:

- Name
- Status (Active/In-Active)

The screenshot shows a modal window titled "Add Money Source". Inside, there is a label "Name*" followed by a text input field containing "Enter Name". Below the input field are two radio buttons: one labeled "Active" which is selected, and another labeled "In-Active". At the bottom of the modal are two buttons: a blue "Cancel" button and a grey "Add" button.

Figure 78: Add Money Source

If any validation error message appears on the screen, then admin will remain on the “Add Money Source” page or else admin will be redirected to the “Money Source List” page with success message.

Duplicate Money Source type check on name

Location name should be unique else validation message will appear when admin save the page.

After Successfully Adding the Money Source, User will receive a “Successfully Added” pop-up notification & record will get reflected under the “Money Source List” section.

4.1.17.2. Money Source List [Columns: Name, Status, Action]

After selecting the “Money Source” option from the Left Navigation Bar, the system will allow the admin to view the Money Source Information in the “Money Source List” menu as shown below in figure 74: This page will appear from left navigation (Money Source -> Money Source List)

The screenshot shows the Argus software interface. On the left, there is a dark blue sidebar with various menu items: Dashboard, Process Manual, User, Department, Insurance, Manage QC Point, Payment Type, Company, Group, Doctor, Email Template, Hourly Task, Revenue Type, AR Database (which is highlighted in blue), Location, Money Source (which is also highlighted in blue), and Trainee Evaluation. The main area has a white background with a title bar "Money Source List" and a "Add New" button. Below the title is a "Filter" section. A table lists nine entries under the "Name" column: Achieve Medical Groups form, AIM, Credit Card : RevSpring, Credit Card : Waystar, Home, LockBox, Mail, Office, and Pt. Service/Mail. The "Enabled" column for all entries shows "Active". At the bottom right of the table, there are pagination controls: "Items per page: 10", "1 – 9 of 9", and arrows for navigating through the pages.

Figure 74: Money source list

Money Source list will have following columns:

- Name: Name of the Money Source will be displayed under this Column.
- Status: Active/In-Active status of the Money Source will be displayed under this Column.
- Action: The Action menu will provide following functionalities:
 - Status: Selecting this checkbox will allow Admin to set “Active” status & Deselecting this Checkbox will set “In-Active” status for the selected Money Resource as shown below in Figure: 75.



Figure 75: Active/In-Active Checkbox – Action.

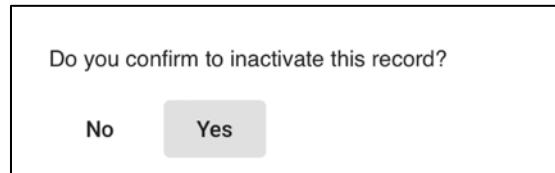


Figure 75.1 Active/In-Active Status Confirmation

Also, on click of Active/In-Active Status Check Box a confirmation Pop-up will appear on the screen. Where user will be allowed to select “Yes” to confirm the Active/Inactive state or “No” to discard as shown below in Figure: 20.1.

- Edit: Selecting “Edit” Icon as shown below in Figure 76.1, will allow Admin to Edit/Update the information: Name & Active/In-Active status of the selected Money Source as shown below in Figure:76.2.



Figure 76.1: Edit Icon – Action.

Update Money Source	
Name*	
Achieve Medical Groups form	
<input checked="" type="radio"/> Active <input type="radio"/> In-Active	
Cancel	Update

Figure 76.2: Edit/Update Money Source

After Editing/Updating the Money Source, User needs to click on “Update” to confirm the changes & if User clicks on “Cancel” option for any changes made will be discarded.

Searching [Criteria: Keyword (name), Status]

- 4.1.17.3.** Excel Sheet Report: Admin needs to select the “Excel” Option as available on the top right corner of the “Money Source List” menu, which will allow Admin to download the “Money Source List” sheet in Excel format.

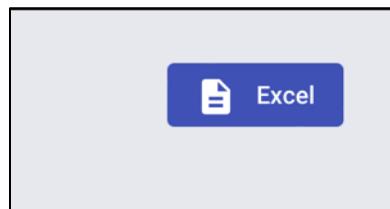


Figure: 52.1 Excel Sheet Option

ID	Name	Enabled
2	LockBox	Active
3	Mail	Active
4	Pt. Service/Mail	Active
5	Office	Active
6	Home	Active
7	Achieve Medical Groups form	Active
9	AIM	Active
11	Credit Card : Waystar	Active
12	Credit Card : RevSpring	Active

Figure: 52.1 Money Source Excel Sheet

4.1.18. Charge Batch Type

4.1.18.1. Add Charge Batch Type

This page will appear from left navigation (Charge Batch Type ->Add Charge Batch Type) as shown below in Figure:78. This page can be accessed by Admin or users who have sub-admin extra permission. The fields marked with (*) are mandatory fields.

This page will have following fields:

- Name
- Description
- Status (Active/In-Active)

Add Charge Batch Type

Name*

Enter Name

Description

Enter Description

Active In-Active

Cancel Add

Figure 78: Add Charge Batch Type

If any validation error message appears on the screen, then admin will remain on the “Add Charge Batch Type” page or else admin will be redirected to the “Charge Batch Type List” page with success message.

After Successfully Adding the Charge Batch Type, User will receive a “Successfully Added” pop-up notification & record will get reflected under the “Charge Batch Type List” section.

4.1.18.2. Charge Batch Type List

After selecting the “Charge Batch Type” option from the Left Navigation Bar, the system will allow the admin to view the Money Source Information in the “Charge Batch Type List” menu as shown below in figure 74: This page will appear from left navigation (Charge Batch Type -> Charge Batch Type List)

Argus Medical Management, LLC The Preferred Practice Management Company		
Welcome Peachy		
Charge Batch Type List + Add New		
Filter		
Action	Name	Status
<input checked="" type="checkbox"/> +	Facility	Active
<input checked="" type="checkbox"/> +	Hospital	Active
<input checked="" type="checkbox"/> +	Office	Active
<input checked="" type="checkbox"/> +	Homodiasis	Active
<input checked="" type="checkbox"/> +	CAP	Active
<input checked="" type="checkbox"/> +	Home Health	Active
<input checked="" type="checkbox"/> +	CHDP	Active
<input checked="" type="checkbox"/> +	Other	Active
<input checked="" type="checkbox"/> +	Home Visits	Active
<input checked="" type="checkbox"/> +	SNF	Active

Figure 74: Money source list

Charge Batch Type list will have following columns:

- Name: Name of the charge batch type name will be displayed under this Column.
- Status: Active/In-Active status of the charge batch type will be displayed under this Column.
- Action: The Action menu will provide following functionalities:
 - Status: Selecting this checkbox will allow Admin to set “Active” status & Deselecting this Checkbox will set “In-Active” status for the selected charge batch type as shown below in Figure: 75.



Figure 75: Active/In-Active Checkbox – Action.

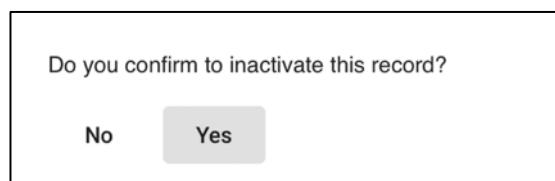


Figure:..1 Active/In-Active Status Confirmation

Also, on click of Active/In-Active Status Check Box a confirmation Pop-up will appear on the screen. Where user will be allowed to select “Yes” to confirm the Active/Inactive state or “No” to discard as shown below in Figure: 20.1.

- Edit: Selecting the “Edit” Icon as shown below in Figure 76.1, will allow Admin to Edit/Update the information: Name & Active/In-Active status of the selected charge batch type as shown below in Figure:76.2.

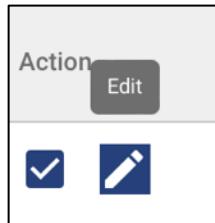


Figure 76.1: Edit Icon – Action.

Figure 76.2: Edit/Update Charge Batch Type

After Editing/Updating the Charge Batch Type, User needs to click on “Update” to confirm the changes & if User clicks on the “Cancel” option for any changes made will be discarded.

Searching [Criteria: Keyword (name), Status]

Section 2. User Section

4.1.19. User Dashboard

4.1.19.1. Dashboard/Landing Page

After Successfully Logging-In, User will be landing on the dashboard where User section screen will be displaying the “Dashboard” containing different Sections and Sub-sections which will be hyperlinks and can be accessed as shown in Figure:

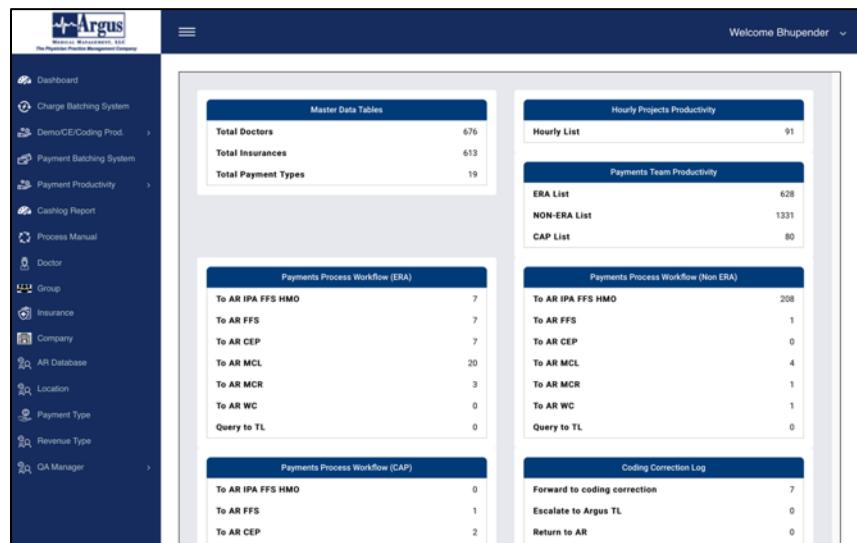


Figure no: User Section-Dashboard

Users can access the links mentioned under the sections.

Following are the 17 divided Sections & Sub-sections:

- **Master Data Tables:** Under this section, User will be able to view the following information as shown below in Figure:

- Total Doctors, Total Insurances & Total Payment Type

Master Data Tables	
Total Doctors	676
Total Insurances	613
Total Payment Types	19

Figure no: Master Data Tables

1. Total Doctor

After selecting the “Total Doctor” link, User will be redirected to the Doctor List as shown below on Figure: . Where user will be able to check the Doctor Details.

Action	Doctor	Group Name	Company Name	Code	Enabled
<input checked="" type="checkbox"/>	Abary, Alexander		Access Primary Care Physicians, Inc	11	Active
<input checked="" type="checkbox"/>	Abbas, Abdul	Prohealth	Prohealth Partners A Medical Group Inc	4820	Active
<input checked="" type="checkbox"/>	ABC	San Bartolome, Mario	Prohealth Partners A Medical Group Inc	3000	Active
<input checked="" type="checkbox"/>	Aboshady in Patient Services				Active
<input checked="" type="checkbox"/>	Aboshady, Moustafa	Prohealth	Prohealth Partners A Medical Group Inc	4895	Active
<input checked="" type="checkbox"/>	Access PCPInc		Access Primary Care Physicians, Inc		Active
<input checked="" type="checkbox"/>	Adams, John	Prohealth	Prohealth Partners A Medical Group Inc	4266	Active
<input checked="" type="checkbox"/>	adrian	Prohealth	Access Primary Care Physicians, Inc	00	Active
<input checked="" type="checkbox"/>	Advanced Dermatology Care Center				Active
<input checked="" type="checkbox"/>	Ahn, Don		BBDE, Professional Medical Corp	4260	Active

Figure no: Total Doctor

Also, User will be able to Add New Doctor and Download the Excel sheet of Doctor List.

2. Total Insurance

After selecting the “Total Insurance” link, User will be redirected to the Insurance List as shown below on Figure: . Where user will be able to check the Insurance Details.

Action	Insurance Name	Description	Enabled
<input checked="" type="checkbox"/>	1st Med Insurance Plan		Active
<input checked="" type="checkbox"/>	AARP2		Active
<input checked="" type="checkbox"/>	Access		Active
<input checked="" type="checkbox"/>	Acclaim		Active
<input checked="" type="checkbox"/>	Accountable Health		Active
<input checked="" type="checkbox"/>	Active Care Management		Active
<input checked="" type="checkbox"/>	Administrative Concepts Inc		Active
<input checked="" type="checkbox"/>	Advanced Benefit Solutions		Active
<input checked="" type="checkbox"/>	Advantage Care IPA		Active
<input checked="" type="checkbox"/>	Advantage Health Network		Active

Figure no: Total Insurance

Also, User will be able to Add New Insurance and Download the Excel sheet of Insurance List.

3. Total Payment Types

After selecting the “Total Payment Types” link, User will be redirected to the Payment Type List as shown below on Figure: . Where user will be able to check the Payment Type Details.

Action	Payment Type Name	Description	Status
<input checked="" type="checkbox"/>	Admin Income	Admin Income	Active
<input checked="" type="checkbox"/>	Agency Income	income	Active
<input checked="" type="checkbox"/>	Ancillary Income	Ancillary Income	Active
<input checked="" type="checkbox"/>	CAP	CAP	Active
<input checked="" type="checkbox"/>	Correspondence	Correspondence	Active
<input checked="" type="checkbox"/>	EFT/FFS	EFT/FFS	Active
<input type="checkbox"/>	ERA/FFS	ERA/FFS	In-Active
<input checked="" type="checkbox"/>	FFS	FFS	Active
<input checked="" type="checkbox"/>	Insurance Letters		Active
<input checked="" type="checkbox"/>	IPA FFS	IPA FFS	Active

Figure no: Total Payment Types

Also, User will be able to Add New Insurance and Download the Excel sheet of Payment Type List.

- **Hourly Project Productivity:** User will be able to view the following information as shown below in Figure:

- Hourly List

Hourly List	91

1. Hourly List

Add Hourly Productivity

This page will appear after selecting (Hourly Task > Add New) as shown below in Figure:. This page can be accessed by users who have sub-admin extra permission. The fields marked with (*) are mandatory fields.

This page will have following fields:

- Time (Hours)
- Time Name
- Date Received
- Task Completed
- Detail

The screenshot shows a modal dialog titled "Add Hourly Productivity". The form includes the following fields:

- Time (Hours): Two input fields showing "0" each, with a note "= 0 Hours".
- Task Name*: A dropdown menu labeled "Select Task Name".
- Date Received: A date input field with a "MM/DD/YYYY" placeholder and a calendar icon.
- Task Completed: A date input field with a "MM/DD/YYYY" placeholder and a calendar icon.
- Detail*: A text area labeled "Enter Remark".
- Buttons: "Cancel" and "Add".

Figure : Add Hourly Productivity

If any validation error message appears on the screen, then admin will remain on the “Add Hourly Productivity” page or else admin will be redirected to the “Hourly Productivity” page with success message.

After Successfully Adding the Hourly Productivity, User will receive a “Successfully Added” pop-up notification & record will get reflected under the “Hourly Productivity List” section.

After selecting the “Hourly List” link, User will be redirected to the Hourly Productivity Page as shown below on Figure: . Where user will be able to check the Hourly productivity of the Tasks.

Figure no: Hourly Productivity

Hourly Productivity will have the following Search filters:

- Task Name: User will be able to select the Task from the drop-down List, where all the Task Names will be available.
- Created Date From: User will be able to select the “Created Date From” the Calendar.
- Created Date To: User will be able to select the “Created Date To” from the Calendar.
- Task Received Date From: User will be able to select the Task Received Date To from the Calendar.
- Task Received Date To: User will be able to select the Task Received Date from the Calendar.
- Task Completed Date From: User will be able to select the Task Completed Date from the Calendar.

- Task Completed Date To: User will be able to select the Task Completed Date To from the Calendar.
- Created By: User will be able to select the Task created by from the drop-down List, where all the list of Users who created Tasks will be available.

User can select desired Search options as required. It is not Mandatory to fill all the Options provided.

After selecting the options, User will click on the “Search” button to search that task as per the Inputs provided. If the User clicks on the “Cancel” button, the selected Filters will be removed instantly.

Selecting the “Print” option will allow the user to print the details as per the requirement.

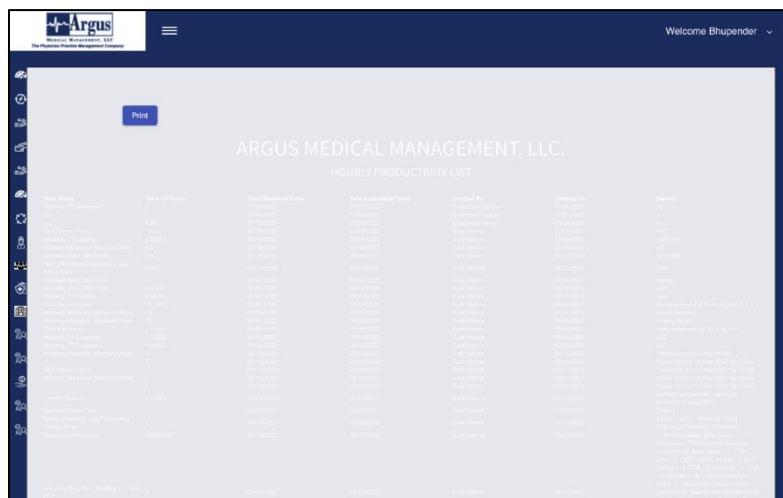


Figure no: Hourly Productivity-Print

Searched/List of Hourly Productivity Task will be displayed under the following Columns:

- Task Name: User will be able to view the Name of the Task.
- Time: User will be able to view the No. of Hours given to the tasks.
- Details: User will be able to view the details provided regarding the Task.
- Task Received Date: User will be able to view the Date when the particular task was received.

- Task Completed Date: User will be able to view the Date when the particular task was completed.
- Action: The Action menu will provide following functionalities:
 - Edit: Selecting “Edit” Icon as shown below in Figure , will allow Admin to Edit/Update the information: Time, Task Name, Date Received, Task Completed & of the selected Hourly Task as shown below in Figure: . Fields marked with (*) are mandatory.



Figure :. Edit Icon – Action.

The screenshot shows a form titled "Update Hourly Productivity". The "Time (Hours)" section contains two input fields: one with "12" and another with "0", resulting in a total of "12 Hours". The "Task Name*" section has a dropdown menu showing "Working Medicare_Medical Offset". The "Date Received" and "Task Completed" sections both have date pickers set to "5/1/2023". The "Detail*" section contains the text "Testing Mode". At the bottom are "Cancel" and "Update" buttons.

Figure : Edit/Update Hourly Productivity

After Editing/Updating the Hourly Productivity, User needs to click on “Update” to confirm the changes & if User clicks on “Cancel” option for any changes made will be discarded.

Selecting the “Excel” option will allow the user to download Excel sheet of the Hourly Productivity details as shown below in Figure: .

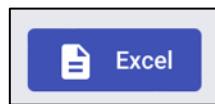


Figure no: Excel Sheet Icon

ID	Task Name	Hourly Task Name	Minutes	Hours	Time	Detail	Created By	Created On	Date Recvd	Date Task Completed
106063	55	Updating Elec Clm Batch	01	02	2.01667	test	vishal user	2023/06/15	2023/06/01	2023/06/14
106062	65	Working CT Credits	89	02	3.48333	test	vishal user	2023/06/15	2023/06/01	2023/06/01

Figure no: Downloaded Excel Sheet

- **Payments Team Productivity:** User will be able to view the following information as shown below in Figure:

- ERA List, NON-ERA List & CAP List

Payments Team Productivity	
ERA List	628
NON-ERA List	1331
CAP List	80

Figure no: Payments Team Productivity

1. ERA List

Add Payment Batch Details (ERA)

This page will appear after selecting (ERA List > Add New ERA) as shown below in Figure:. This page can be accessed by users who have sub-admin extra permission. The fields marked with (*) are mandatory fields.

The form fields include:

- Ticket Number: Input field with placeholder 'Enter Ticket' and a 'Get Detail' button.
- Date Received: Input field.
- Dr. Office: Input field.
- Deposit Amount (In USD): Input field.
- CK Number*: Input field.
- Other income: (In USD): Input field.
- Enter Other income: (In USD): Input field.
- Agency Money: (In USD): Input field.
- Enter Agency Money: (In USD): Input field.
- Old prior AR: (In USD): Input field.
- Enter Old prior AR: (In USD): Input field.
- +/- Posting: (In USD): Input field with value '0'.
- Total Posted Amount: (In USD): Input field with value '0'.
- 2. Electronically: (In USD): Input field.
- Enter Electronically: (In USD): Input field.
- 3. Suspect Amount: (In USD): Input field.
- Enter Suspect Amount: (In USD): Input field.
- Manual Transaction: Input field.
- Enter Manual Transaction: Input field.
- Cancel: Button.
- Add: Button.

Figure : Add Payment Batch Details (ERA)

If any validation error message appears on the screen, then admin will remain on the “Add Payment Batch Details (ERA)” page or else admin will be redirected to the “ERA Productivity” page with success message.

After Successfully Adding the Payment Batch Details (ERA), User will receive a “Successfully Added” pop-up notification & record will get reflected under the “ERA Productivity” section.

After selecting the “ERA List” link, User will be redirected to the ERA Productivity Page as shown below on Figure: . Where user will be able to check the ERA productivity of the Tasks.

Figure no: ERA Productivity

ERA Productivity will have the following Search filters:

- Group/Doctor Name: User will be able to select the “Group/Doctor Name” from the drop-down List, where all the Group/Doctor Names will be available.
- Ticket No.: User will be able to Enter the “Ticket No.” available.
- CT Posted Date From: User will be able to select the “CT Posted Date From” the Calendar.
- Work Flow: User will be able to select the “Work Flows” from the drop-down List, where all Work Flow Names will be available.

- Posted By: User will be able to select the name of user from the “Posted By” drop-down List, where all user names will be available.
- Created Date From: User will be able to select the “Created Date From” the Calendar.

User can select desired Search options as required. It is not Mandatory to fill all the Options provided.

After selecting the options, User will click on the “Search” button to search that task as per the Inputs provided. If the User clicks on the “Cancel” button, the selected Filters will be removed instantly.

Searched/List of ERA Productivity Task will be displayed under the following Columns:

- Batch/Ticket#: User will be able to view the “Batch/Ticket” No. of the ERA Productivity under this column.
- Dr. Office: User will be able to view the name of “Dr. Office” under this column.
- Payment Type: User will be able to view the “Payment Type” Name under this column.
- CK Number: User will be able to view the “CK Number” of the ERA Productivity under this column.
- Posted Amt.: User will be able to view the “Posted Amt.” in dollars under this column.
- Elec. Post Amt.: User will be able to view the “Elec. Post Amt.” in dollars under this column.
- Suspense Amt.: User will be able to view the “Suspense Amt.” in dollars under this column.

- Agency money: User will be able to view the “Agency Money” under this column.
- Action: The Action menu will provide following functionalities:
 - Edit: Selecting “Edit” Icon as shown below in Figure , will allow Admin to Edit/Update the information: CK Number, Manually(In USD), Electronically (In USD), Total Posted Amount (In USD), Suspense Amount (In USD), Date Posted, Other Income (In USD), Agency Money (USD), Old Prior AR (In USD), +/- Posting(In USD), Manual Transaction, Electronic Transaction, Remarks, Offset & Work Flow of the selected ERA Productivity as shown below in Figure: . Fields marked with (*) are mandatory.



Figure .: Edit Icon – Action.

Update Payment Batch Details (ERA)	
Ticket Number:	10020598
Date Received:	05/30/2023
Insurance:	1st Med Insurance Plan
Payment Type:	Admin Income
Dr. Office:	ProHealth
Deposit Amount (In USD):	700
CK Number*	36595
Other income: (In USD)	75
1. Manually: (In USD)	700
Agency Money: (In USD)	20
2. Electronically: (In USD)*	250
Old prior AR: (In USD)	10
Total Posted Amount: (In USD)	950
+/- Posting: (In USD)	-250
3. Suspense Amount: (In USD)	30
Manual Transaction	0
Date Posted*	5/22/2023
Electronic Transaction	0
Remarks	test
Offset	<input type="checkbox"/>
Work Flow	
<input type="button" value="Cancel"/> <input type="button" value="Update"/> <input type="button" value="Refund Request"/>	

Figure .: Edit/Update Payment Batch Details (ERA)– Action

After Editing/Updating the Edit/Update Payment Batch Details (ERA), User needs to click on “Update” to confirm the changes & if User clicks on “Cancel” option for any changes made will be discarded.

After Updating the AR-Workflow: Refund form, User needs to click on “FWD to Payment” which will redirect the user to the Edit/Update Payment Batch Details (ERA) page & if User clicks on “Cancel” option for any changes made will be discarded.

Selecting the “Print Productivity” option will allow the user to print the details as per the requirement.

Figure no: Print Productivity - Icon

ARGUS MEDICAL MANAGEMENT, LLC. PAYMENT PRODUCTIVITY TRACKING SYSTEM																	
ID	Ticket Number	Dr. Office	Insurance	Cx Number	Deposit Amt.	Manual Postd Amt.	Elec. Postd Amt.	Amt Postd in CT	New Date	Total Time Taken	Manual Trans.	Elec. Trans.	Total Trans.	Date Posted	Posted By	Remarks	
2046	10020602	ProHealth	1st Med Insurance Plan	547272	45	12	20	32	06/08/2013	30	221	12	233	06/08/2013	Bhupender Singh	testing only	
2044	10020598	ProHealth	1st Med Insurance Plan	363895	700	700	230	950	05/22/2013	0	0	0	0	05/22/2013	Bhupender Singh	test	
2043	10020599	ProHealth	Affiliated Doctors of OC	2a	0	0	0	0	05/22/2013	0	0	0	0		Irene Balli		
2042	10020598	ProHealth	1st Med Insurance Plan	363895	700	700	230	950	05/22/2013	0	0	0	0	05/22/2013	Bhupender Singh	test	
2041	10020598	ProHealth	1st Med Insurance Plan	363895	700	700	230	950	05/22/2013	23	144	41	185	05/22/2013	Bhupender Singh	test	
2040	10020597	ProHealth	1st Med Insurance Plan	453236	500	500	25	525	05/22/2013	25	210	35	245	05/22/2013	Bhupender Singh	test	
2039	10020596	ProHealth	1st Med Insurance Plan	363546	4235	4587	25	4612	05/22/2013	30	875	375	1450	05/22/2013	Bhupender Singh	test	
2038	10020595	ProHealth	1st Med Insurance Plan	33758	4577	5455	434	5879	05/22/2013	30	124	124	248	05/22/2013	Bhupender Singh	test	
2037	10020594	ProHealth	1st Med Insurance Plan	423375	4578	254	12	266	05/21/2013	30	25	35	60	05/22/2013	Bhupender Singh	right	
2036	10020599	ProHealth	Affiliated Doctors of OC	2	0	0	0	0	05/02/2013	30	54	0	54		Irene Balli	test	
2035	10020590	ProHealth	Ariza	2323	3	2	1	3	05/14/2013	32	1	1	2		Irene Balli	test	
2032	10020579	Bryant, Diana V.C.	Access	222	23334	0	0	0	05/06/2013	30	0	0	0	03/19/2013	Ahmedek Koushal		
2030	10020569	ADM Psych	Ariza	8946564	0	500	400	900	05/06/2013	30	0	0	0			test5623	
2029	10020569	ADM Psych	Ariza	8946564	0	500	400	900	05/06/2013	30	0	0	0			test5623	
2028	10020576	Dixing, Clayton	Access	222	1322	1322	0	1322	05/06/2013	31	1	1	2		Bhupender Singh	test	
2027	10020574	Maged, Arthur	Accenter Health	223	9	1	8	9	05/28/2013	11	1	1	2			test	
2026	10020514	ProHealth		8946564	800	500	300	800	05/01/2012	11	1	1	2	02/24/2013	Poohy Pauline	test	
2025	10020510	Borunda, Murali	Access	222	333	0	0	0	03/24/2013	30	2	2	4				
2024	10020513	ProHealth	AARP2	8946564	800	500	300	800	04/01/2012	7	8	6	11	02/24/2013	Poohy Pauline	test	
2023	10020516	Clark, Dennis	Access	312	22	0	20	20	03/13/2013	11	2	2	4	03/13/2013			
2021	10020519	Borunda, Murali	Access	222	333	0	0	0	03/24/2013	30	2	2	4				
2020	1299316	Lakewood Orthopedic Medical Group	AppleCare	45433433	909.57	909.57	0	909	09/22/2017	30	0	0	0	09/29/2017	Raja Kumar		
2019	1299315	Lakewood Orthopedic Medical Group	Patient Post	222	163.04	163.04	0	163	09/22/2017	30	4	23	27	09/29/2017	Raja Kumar		

Figure no: Print Productivity

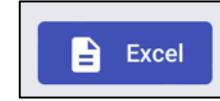


Figure no: Excel Sheet- Icon

Selecting the “Excel” option will allow the user to download Excel sheet of the ERA Productivity details as per the requirement.

ID	Batch ID	Scan Date	Chk Number	Electronically	Manual Tran	Payment Pro Is	Offset	Remark	Time	Doctor	Created By	Created On	Modified By	Modified On
2050	10020676	08/11/2023	214124	0	0	3	0	test	11	Kelley Whe Umesh Kumi	08/11/2023	Umesh Kumi	08/11/2023	
2049	10020677	08/11/2023	78036498	320	520	1	0	test	30	Kelley Whe Umesh Kumi	08/11/2023	null null	08/11/2023	
2048	10020608	06/09/2023	78036499	1111	1	2	0	1	1	Cynthia Che Bhupender S	06/09/2023	null null	06/09/2023	
2047	10020518	02/13/2023	78036498	0	0	2	0	test	40	Cynthia Che Bhupender S	02/13/2023	null null	02/13/2023	
2046	10020602	06/08/2023	547272	12	221	1	1	testing 8	31	Ashkan Am-Bhupender S	06/08/2023	Lucky pay	07/28/2023	
2045	10020599	05/23/2023	21	1	3	3	0	test	1	Theodore T Umesh Kumi	05/26/2023	Umesh Kumi	07/19/2023	
2044	10020598	05/22/2023	36595	0	0	1	1	test	30	Ashkan Am-Bhupender S	05/26/2023	null null	05/26/2023	
2043	10020598	05/02/2023	26	0	0	1	0	test	20	Ashkan Am-love-Bali AR	05/26/2023	love Bali AR	05/26/2023	
2042	10020598	05/22/2023	36595	0	0	1	1	test	10	Ashkan Am-love Bali AR	05/24/2023	love Bali AR	05/24/2023	
2041	10020598	05/22/2023	36595	41	144	1	0	test	25	Ashkan Am-Bhupender S	05/22/2023	null null	05/22/2023	
2040	10020597	05/22/2023	453236	35	210	1	0	fdsg	25	Ashkan Am-Bhupender S	05/22/2023	null null	05/22/2023	
2039	10020596	05/22/2023	563546	575	875	1	0	test	30	Ashkan Am-Bhupender S	05/22/2023	null null	05/22/2023	
2038	10020595	05/22/2023	53758	124	124	1	0	testy	30	Ashkan Am-Bhupender S	05/22/2023	null null	05/22/2023	
2037	10020594	05/21/2023	424375	35	25	1	0	fgdrt	30	Ashkan Am-Bhupender S	05/22/2023	null null	05/22/2023	
2036	10020589	05/02/2023	2	0	54	1	1	test	30	Ashkan Am-Bhupender S	05/11/2023	null null	05/11/2023	
2035	10020591	05/03/2023	2	0	455	1	1	o	30	Ashkan Am-Bhupender S	05/11/2023	Bhupender S	06/20/2023	
2034	10020590	05/02/2023	522	2	545	3	1	test	22	Ashkan Am-Bhupender S	05/11/2023	lucky pay	07/28/2023	
2033	10020580	03/14/2023	2323	1	1	1	0	testb	32	Ashkan Am-love Bali AR	03/14/2023	love Bali AR	05/11/2023	
2032	10020579	03/06/2023	222	0	0	1	0	test	30	MD Victor W Bhupender S	03/06/2023	null null	03/06/2023	
2031	10020569	03/06/2023	8946564	0	0	2	0	test3623	30	DO Matthew Bhupender S	03/06/2023	Bhupender S	03/06/2023	
2030	10020569	03/06/2023	8946564	0	0	1	0	test3623	30	DO Matthew Bhupender S	03/06/2023	Bhupender S	03/09/2023	
2029	10020569	03/06/2023	8946564	0	0	1	0	test3623	30	DO Matthew Bhupender S	03/06/2023	null null	03/06/2023	
2028	10020576	03/06/2023	222	1	1	1	0	test	11	NP Karrie W Bhupender S	03/06/2023	Bhupender S	03/06/2023	
2027	10020574	02/28/2023	223	1	1	1	0	test	11	DO Maria Hi Bhupender S	02/28/2023	Bhupender S	03/03/2023	
2026	10020559	02/24/2023	8946564	1	1	1	0	test	11	Ashkan Am-Bhupender S	02/24/2023	Bhupender S	02/27/2023	
2025	10020559	02/24/2023	8946564	2	2	1	0	test	30	Ashkan Am-Bhupender S	02/24/2023	Bhupender S	02/27/2023	
2024	10020553	01/01/2023	8946564	6	5	1	0	test	7	Ashkan Am-Bhupender S	02/27/2023	Bhupender S	02/27/2023	
2023	10020558	02/13/2023	322	2	2	1	0	test	11	NP April M Bhupender S	02/26/2023	Bhupender S	03/03/2023	
2022	10020556	02/25/2023	334	2	2	3	0	test	22	MD Kee Bin I Bhupender S	02/25/2023	Bhupender S	03/06/2023	
2021	10020539	02/24/2023	222	2	2	1	0	test	30	MD Kee Bin I Bhupender S	02/25/2023	null null	02/25/2023	
2020	1289316	09/22/2017	45433433	0	0	1	0	test	30	Paul Chang I null	02/24/2023	null null	02/24/2023	
2019	1289315	09/22/2017	222	23	4	1	0	test	30	Paul Chang I Bhupender S	02/23/2023	null null	02/24/2023	
2018	1289315	09/22/2017	3243232341	23	0	1	0	test	30	Paul Chang I null	02/23/2023	null null	02/23/2023	
2017	10020539	02/24/2023	222	2	2	1	0	test	30	MD Kee Bin I Bhupender S	02/22/2023	null null	02/24/2023	
2016	10020536	02/20/2023	222	4	3	1	0	test	30	Soyoung YY null	02/20/2023	null null	02/21/2023	
2015	10020518	02/13/2023	5856562758	0	0	3	0	Test	30	Cynthia Che Bhupender S	02/17/2023	Bhupender S	02/17/2023	
2014	10020528	02/17/2023	22456767	0	0	0	1	0 Test 11	30	Ghazaleh B null	02/17/2023	null null	02/17/2023	
2013	10020519	02/13/2023	423	0	0	1	0	Test	30	Jackson Che null	02/17/2023	null null	02/17/2023	

Figure no: Downloaded ERA Excel Sheet

2. Non-ERA List

Add Payment Batch Details (Non-ERA)

This page will appear after selecting (Non-ERA List > Add New Non-ERA) as shown below in Figure:. This page can be accessed by users who have sub-admin extra permission. The fields marked with (*) are mandatory fields

Add Payment Batch Details (Non-ERA)

Ticket Number:	<input type="text" value="Enter Ticket"/>	<button style="background-color: #004a99; color: white; border: none; padding: 2px 5px;">Get Detail</button>
Date Received:		
Insurance:		
Payment Type:		

CK Number*	<input type="text" value="Enter CK Number"/>	Other income: (in USD)	Enter Other income: (in USD)
1. Manually: (in USD)	<input type="text" value="Enter Manually: (in USD)"/>	Agency Money: (in USD)	Enter Agency Money: (in USD)
2. Electronically: (in USD)*	<input type="text" value="Enter Electronically: (in USD)"/>	Old prior AR: (in USD)	Enter Old prior AR: (in USD)
Total Posted Amount: (in USD)	0	+/- Posting: (in USD)	0
3. Suspense Amount: (in USD)	<input type="text" value="Enter Suspense Amount: (in USD)"/>	Manual Transaction	Enter Manual Transaction
Date Entered:	2023-02-24 10:45:00		
	Electronic		

Figure : Add Payment Batch Details (Non-ERA)

If any validation error message appears on the screen, then admin will remain on the “Add Payment Batch Details (Non-ERA)” page or else admin will be redirected to the “Non-ERA Productivity” page with success message.

After Successfully Adding the Payment Batch Details (Non-ERA), User will receive a “Successfully Added” pop-up notification & record will get reflected under the “ERA Productivity” section.

After selecting the “Non-ERA List” link, User will be redirected to the Non-ERA Productivity Page as shown below on Figure: . Where user will be able to check the non-ERA productivity of the Tasks.

The screenshot shows the Argus Non-ERA Productivity page. At the top, there are search filters for Group/Doctor Name, Work Flow, Ticket No., Posted By, CT Posted Date From, and Created Date From. Below the filters is a table with columns: Action, Batch/Ticket#, Dr. Office, Payment type, CK Number, Posted Amt., Elec. Post Amt., Suspense Amt., and Agency Money. The table contains several rows of task data.

Action	Batch/Ticket#	Dr. Office	Payment type	CK Number	Posted Amt.	Elec. Post Amt.	Suspense Amt.	Agency Money
	10020591	ProHealth	Non-ERA	2	\$222	\$222	\$0	0
	10020569	AIM Psych	Non-ERA	8946564	\$900	\$400	\$4	2
	10020521	NAFMG (Sugarland)	Non-ERA	2332	\$0	\$0	\$0	0
	1771757	NAFMG (Whittier)	Non-ERA	876847839	\$2333	\$0	\$1	1
	1003920	Tarlow, Gardner	Non-ERA		\$1892.6	\$0	\$0	0
	1002584	Faynsod, Moshe	Non-ERA		\$48.2	\$0	\$0	0
	1002475	Mehita, Manan	Non-ERA		\$0	\$0	\$0	0

Figure no: Non-ERA Productivity

Non-ERA Productivity will have the following Search filters:

- Group/Doctor Name: User will be able to select the “Group/Doctor Name” from the drop-down List, where all the Group/Doctor Names will be available.
- Ticket No.: User will be able to Enter the “Ticket No.” available.

- CT Posted Date From: User will be able to select the “CT Posted Date From” the Calendar.
- Workflow: User will be able to select the “Workflows” from the drop-down List, where all Work Flow Names will be available.
- Posted By: User will be able to select the name of user from the “Posted By” drop-down List, where all usernames will be available.
- Created Date From: User will be able to select the “Created Date From” the Calendar.

User can select desired Search options as required. It is not Mandatory to fill all the Options provided.

After selecting the options, User will click on the “Search” button to search that task as per the Inputs provided. If the User clicks on the “Cancel” button, the selected Filters will be removed instantly.

Searched/List of Non-ERA Productivity Task will be displayed under the following Columns:

- Batch/Ticket#: User will be able to view the “Batch/Ticket” No. of the Non-ERA Productivity under this column.
- Dr. Office: User will be able to view the name of “Dr. Office” under this column.
- Payment Type: User will be able to view the “Payment Type” Name under this column.
- CK Number: User will be able to view the “CK Number” of the Non-ERA Productivity under this column.
- Posted Amt.: User will be able to view the “Posted Amt.” in dollars under this column.

- Elec. Post Amt.: User will be able to view the “Elec. Post Amt.” in dollars under this column.
- Suspense Amt.: User will be able to view the “Suspense Amt.” in dollars under this column.
- Manually: User will be able to view the “Manually” added Amount under this column.
- Scan Date: User will be able to view the “Scan Date” under this column.
- Created By: User will be able to view the “Created By” Name under this column.
- Created Date: User will be able to view the “Created Date” under this column.
- Modified By: User will be able to view the “Modified By” Name under this column.
- Modified On: User will be able to view the “Modified On” Date under this column.
- Posted By: User will be able to view the “Posted By” name under this column.
- Agency money: User will be able to view the “Agency Money” under this column.
- Action: The Action menu will provide following functionalities:
 - Edit: Selecting “Edit” Icon as shown below in Figure , will allow Admin to Edit/Update the information: CK Number, Manually(In USD), Electronically (In USD), Total Posted Amount (In USD), Suspense Amount (In USD), Date Posted, Other Income (In USD), Agency Money (USD), Old Prior AR (In USD), +/- Posting(In USD), Manual Transaction, Electronic Transaction, Remarks, Offset & Work Flow of the selected ERA Productivity as shown below in Figure:. . Fields marked with (*) are mandatory.



Figure .: Edit Icon – Action.

The screenshot shows a software interface titled "Update Payment Batch Details (Non-ERA)". The top header displays ticket number 10020591, date received 05/31/2023, dr. office ProHealth, insurance Acclaim, and deposit amount 222. The main form contains several input fields:

- CK Number***: 2
- Date Received**: 05/31/2023
- Dr. Office**: ProHealth
- Insurance**: Acclaim
- Deposit Amount(in USD)**: 222
- Payment Type**: Agency Income
- 1. Manually: (in USD)**: 0
- Other income: (in USD)**: 0
- Agency Money: (in USD)**: 0
- 2. Electronically: (in USD)***: 222
- Total Posted Amount: (in USD)**: 222
- Old prior AR: (in USD)**: 0
- ← Posting: (in USD)**: 0
- 3. Suspense Amount: (in USD)**: 0
- Manual Transaction**: 455
- Date Posted***: 5/3/2023
- Electronic Transaction**: 0
- Remarks**: test
- Offset**:
- Work Flow**:

At the bottom are three buttons: Cancel, Update, and Refund Request.

Figure .: Edit/Update Payment Batch Details (Non-ERA)– Action

After Editing/Updating the Edit/Update Payment Batch Details (ERA), User needs to click on “Update” to confirm the changes & if User clicks on “Cancel” option for any changes made will be discarded.

If User click on the “Refund Request” button user will be redirected to “AR-Workflow: Refund” Request as shown above in Figure: . Where user will be able to fill in the details like: Batch No., Refund Letter Date, Page No., Refund Request Amt., Remarks & Status.

After Updating the AR-Workflow: Refund form, User needs to click on “FWD to Payment” which will redirect the user to the Edit/Update Payment Batch Details (Non-ERA) page & if User clicks on “Cancel” option for any changes made will be discarded.

Selecting the “Print Productivity” option will allow the user to print the details as per the requirement.



Figure no: Print Productivity - Icon

ARGUS MEDICAL MANAGEMENT, LLC. PAYMENT PRODUCTIVITY TRACKING SYSTEM																		
#ID	Ticket Number	Dr. Office	Incomes	C.N. Number	Deposit Amt	Manual Product Amt	Elev. Product Amt	Amt Period	Scan Date	Total Time Taken	Manual Times	Elev. Times	Total Trans.	Date Period	Posted By	Remarks		
2018	1002091	Pediatrics	Acclaim	2	222	0	222	222	08/08/2013	30	451	0	451		Bhupinder Singh			
2011	1002090	ADM Psych	Arora	894684	0	500	400	900	08/08/2013	30	0	0	0			test023		
2012	1002093	OB/GYN	Acclaim	2712	222	0	0	0	02/11/2013	30	2	0	2			test		
2009	1771757	NAPMC	Obstetrics	67648729	2333	2333	0	2333	08/25/2013	30	0	0	0		Bhupinder Singh			
2000	1002082	Thorac. Gaster.	Power Pan	333	1002.4	1002.4	0	1002	08/23/2013	30	80	0	80	08/28/2013	Babita Sharma			
2008	1002084	Family Med.	BC - Blue Cross	48.2	48.2	0	48	48	08/10/2013	4	4	0	4			Rajpreet Kaur		
2007	1002073	Metro, Maxx	Arts Health	123	0	0	0	0	08/15/2013	3	0	0	0	08/20/2013	Adish Kumar			
2006	1002048	Pediatrics	BC - Blue Cross	1379.68	1379.68	0	1379	1379	08/20/2013	20	40	0	40	08/21/2013	Jagdish Singh			
2004	1002287	Family Med.	Various Incomes	168.35	168.35	0	168	168	08/19/2013	6	4	0	4	08/22/2013	Rajpreet Kaur			
2002	1002088	Thorac. Gaster.	AppleCare	1062.2	1062.2	0	1062	1062	08/23/2013	30	14	0	14	08/28/2013	Babita Sharma			
2001	1002072	Metro, Maxx	Allied Physicians IPN	220.6	220.6	0	220	220	08/18/2013	4	20	0	20	08/28/2013	Adish Kumar			
2009	1002049	Pediatrics	BC - Blue Cross	332.56	332.56	0	332	332	08/20/2013	3	5	0	5	08/21/2013	Jagdish Singh			
2008	1002013	Lax, Stephen	Various Incomes	541.07	541.07	0	541	541	08/23/2013	30	30	0	30	08/28/2013	Babita Sharma			
2007	1002290	Lax, Brian	Curative Med Gyn	634.75	634.75	0	634	634	08/19/2013	18	43	0	43	08/22/2013	Rajpreet Kaur	3/Treas (Rober Echavarria,Jill A. Maguire,Chase (Wilkjeld))		
2005	1002084	Wenatchee Salons	Various Incomes	0	0	0	0	0	08/18/2013	5	0	0	0	08/28/2013	Adish Kumar			
2004	1002047	Pediatrics	Healthcare Partners	4807.26	4807.26	0	4807	4807	08/20/2013	70	230	0	230	08/21/2013	Jagdish Singh	Copy to (Rober Echavarria)		
2002	1002298	Lax, Brian	BCBS - CovertheShia	28.41	28.41	0	28	28	08/19/2013	3	3	0	3	08/22/2013	Rajpreet Kaur			
2000	1002063	Wenatchee Salons	Cigna	112.05	112.05	0	112	112	08/18/2013	6	6	0	6	08/20/2013	Adish Kumar			
1979	1002009	Kapoor, Nikhil	BC - Blue	0	0	0	0	0	08/22/2013	5	1	0	1	08/28/2013	Babita Sharma	2/Zero, Sharm		

Figure no: Print Productivity

Selecting the “Excel” option will allow the user to download Excel sheet of the Non-ERA Productivity details as shown below in Figure: .



Figure no: Excel Sheet – Icon

A	B	C	D	E	F	G	H	I	J	K	L	M	N	O
1	ID	Batch ID	Start Date	CK Number	Electronically-Manual Tran Payment Pro Is Offset					Remark	Time			
2	2019	10020593	2023-05-03		0	455	2	1		30 ProHealth		Created On	Created On	Modified By
3	2031	10020569	2023-05-06	8946564	0	0	2	0	test3623	30 ATM Psych	2023/05/11	null null	1970/01/01	Bhupender Singh
4	2032	10020521	2023-02-17	2332	0	2	2	0	test	30 NAFMG (Sugarland)	2023/04/06	Bhupender Singh	2023/04/06	Bhupender S
5	2009	177157	2013-10-25T	876847839	0	0	2	0		30 NAFMG (Whittier)	2023/02/17	null null	2023/02/13	Bhupender Singh
6	2000	1003920	2013-08-23T	333	0	80	2	0		30 Tarlow, Gardner	2023/02/10	Bhupender S	2023/02/13	Bhupender Singh
7	1999	1002584	2013-08-19T00:00:00.000Z			4	2	0		6 Faysnold, Moshe	2013/09/09	Ranjeet Kumar	2013/09/09	null null
8	1997	1002475	2013-08-15T123		0	0	2	0		5 Mehta, Manan	2013/09/09	Bhupender S	2013/09/09	Modified On
9	1996	1002476	2013-08-15T00:00:00.000Z		60	2	0			20 ProHealth	2013/09/09	Jagdish Singh	2013/09/09	Modified On
10	1994	1002585	2013-08-17T00:00:00.000Z		4	2	0			6 Warach, Saleem	2013/09/09	Ranjeet Kumar	2013/09/09	Modified On
11	1993	1003858	2013-08-23T00:00:00.000Z		14	2	0			30 Thakur, Kartik	2013/09/09	Rohitash Sharma	2013/09/09	Modified On
12	1991	1002472	2013-08-15T00:00:00.000Z		10	2	0			8 Mehta, Manan	2013/09/09	null null	1970/01/01	Ashish Kumar
13	1989	1003459	2013-08-20T00:00:00.000Z		5	2	0			3 ProHealth	2013/09/09	Jagdish Singh	2013/09/09	Modified On
14	1988	1003813	2013-08-23T00:00:00.000Z		10	2	0			30 Lui, Stephen	2013/09/09	Rohitash Sharma	2013/09/09	Modified On
15	1987	1002599	2013-08-19T00:00:00.000Z		43	2	0			18 Lee, Brian	2013/09/09	Ranjeet Kumar	2013/09/09	Modified On
16	1985	1003060	2013-08-15T00:00:00.000Z		0	2	0			5 Warach, Saleem	2013/09/09	Ashish Kumar	2013/09/09	Modified On
17	1984	1002598	2013-08-19T00:00:00.000Z		220	2	0			70 Valerius, Med Grp VC	2013/09/09	Jagdish Singh	2013/09/09	Modified On
18	1982	1002598	2013-08-19T00:00:00.000Z		3	2	0			2 Lee, Brian	2013/09/09	Ranjeet Kumar	2013/09/09	Modified On
19	1980	1003063	2013-08-15T00:00:00.000Z		6	2	0			6 Warach, Saleem	2013/09/09	Ashish Kumar	2013/09/09	Modified On
20	1979	1004069	2013-08-22T00:00:00.000Z		1	2	0			5 Kapoor, Nihil	2013/09/09	Rohitash Sharma	2013/09/09	Modified On
21	1978	1003421	2013-08-20T00:00:00.000Z		375	2	0			140 ProHealth	2013/09/09	Jagdish Singh	2013/09/09	Modified On
22	1976	1002604	2013-08-19T00:00:00.000Z		30	2	0			10 Lui, Stephen	2013/09/09	Ranjeet Kumar	2013/09/09	Modified On
23	1975	1003062	2013-08-15T00:00:00.000Z		4	2	0			5 Warach, Saleem	2013/09/09	Rohitash Sharma	2013/09/09	Modified On
24	1973	1004245	2013-08-23T00:00:00.000Z		6	2	0			30 United Hospitalist Inc	2013/09/09	Ranjeet Kumar	2013/09/09	Modified On
25	1972	1002599	2013-08-19T00:00:00.000Z		4	2	0			10 Lui, Stephen	2013/09/09	Ranjeet Kumar	2013/09/09	Modified On
26	1970	1003420	2013-08-20T00:00:00.000Z		56	2	0			5 ProHealth	2013/09/09	Jagdish Singh	2013/09/09	Modified On
27	1968	1004280	2013-08-23T00:00:00.000Z		8	2	0			30 United Hospitalist Inc	2013/09/09	Rohitash Sharma	2013/09/09	Modified On
28	1967	1004279	2013-08-23T00:00:00.000Z		14	2	0			30 United Hospitalist Inc	2013/09/09	Rohitash Sharma	2013/09/09	Modified On
29	1965	1003419	2013-08-20T00:00:00.000Z		30	2	0			15 ProHealth	2013/09/09	Jagdish Singh	2013/09/09	Modified On
30	1963	1002606	2013-08-19T00:00:00.000Z		6	2	0			5 Lui, Stephen	2013/09/09	Ranjeet Kumar	2013/09/09	Modified On
31	1962	1004320	2013-08-23T00:00:00.000Z		0	2	0			5 Bridges, Duanne	2013/09/09	Rohitash Sharma	2013/09/09	Modified On
32	1960	1004259	2013-08-21T00:00:00.000Z		5	2	0			5 Hong, Andie	2013/09/09	Ranjeet Kumar	2013/09/09	Modified On
33	1956	1004251	2013-08-23T00:00:00.000Z		5	2	0			30 Hong, Andie	2013/09/09	Rohitash Sharma	2013/09/09	Modified On
34	1954	1002589	2013-08-19T00:00:00.000Z		0	2	0			30 Hong, Andy	2013/09/09	Ranjeet Kumar	2013/09/09	Modified On
35	1953	1004263	2013-08-23T00:00:00.000Z		1	2	0			30 Valerius Med Grp VC	2013/09/09	Rohitash Sharma	2013/09/09	Modified On
36	1951	1004262	2013-08-23T00:00:00.000Z		3	2	0			30 Valerius Med Grp VC	2013/09/09	Rohitash Sharma	2013/09/09	Modified On
37	1950	1004283	2013-08-23T00:00:00.000Z		2	2	0			30 Strauss, Michael	2013/09/09	Rohitash Sharma	2013/09/09	Modified On
38	1948	1004284	2013-08-23T00:00:00.000Z		2	2	0			30 Young, Harding	2013/09/09	Rohitash Sharma	2013/09/09	Modified On
39	1947	1002588	2013-08-19T00:00:00.000Z		4	2	0			5 Hong, Andy	2013/09/09	Ranjeet Kumar	2013/09/09	Modified On

Figure no: Downloaded Excel Sheet

3. CAP List

Add Payment Batch Details (CAP)

This page will appear after selecting (CAP List > Add New CAP) as shown below in Figure:. This page can be accessed by users who have sub-admin extra permission. The fields marked with (*) are mandatory fields.

Add Payment Batch Details (CAP)

Ticket Number:

Get Detail

Date Received:

Insurance:

Payment Type:

CK Number*	<input style="width: 100%; border: 1px solid #ccc; height: 25px;" type="text" value="Enter CK Number"/>	Other income: (in USD)	<input style="width: 100%; border: 1px solid #ccc; height: 25px;" type="text" value="Enter Other income: (in USD)"/>
1. Manually: (in USD)	<input style="width: 100%; border: 1px solid #ccc; height: 25px;" type="text" value="Enter Manually: (in USD)"/>	Agency Money: (in USD)	<input style="width: 100%; border: 1px solid #ccc; height: 25px;" type="text" value="Enter Agency Money: (in USD)"/>
2. Electronically: (in USD)*	<input style="width: 100%; border: 1px solid #ccc; height: 25px;" type="text" value="Enter Electronically: (in USD)"/>	Old prior AR: (in USD)	<input style="width: 100%; border: 1px solid #ccc; height: 25px;" type="text" value="Enter Old prior AR: (in USD)"/>
Total Posted Amount: (in USD)	<input style="width: 100%; border: 1px solid #ccc; height: 25px;" type="text" value="0"/>	± Posting: (in USD)	<input style="width: 100%; border: 1px solid #ccc; height: 25px;" type="text" value="0"/>
3. Suspense Amount: (in USD)	<input style="width: 100%; border: 1px solid #ccc; height: 25px;" type="text" value="Enter Suspense Amount: (in I"/>	Manual Transaction	<input style="width: 100%; border: 1px solid #ccc; height: 25px;" type="text" value="Enter Manual Transaction"/>
Date Entered:	<input style="width: 100%; border: 1px solid #ccc; height: 25px;" type="text" value="2023-09-09"/>	Electronic	<input style="width: 100%; border: 1px solid #ccc; height: 25px;" type="text" value="Enter Electronic Transaction"/>

Figure : Add Payment Batch Details (CAP)

If any validation error message appears on the screen, then admin will remain on the “Add Payment Batch Details (CAP)” page or else admin will be redirected to the “CAP Productivity” page with success message.

After Successfully Adding the Payment Batch Details (CAP), User will receive a “Successfully Added” pop-up notification & record will get reflected under the “CAP Productivity” section.

After selecting the “Cap List” link, User will be redirected to the CAP Productivity Page as shown below on Figure: . Where user will be able to check the CAP productivity of the Tasks.

Action	Batch/Ticket#	Dr. Office	Payment type	CK Number	Posted Amt.	Elec. Post Amt.	Suspense Amt.	Agency Money
	10020599	Vascular and General Surgery Associates	CAP	21	\$0	\$0	\$0	0
	10020590	ProlHealth	CAP	5	\$21	\$1	\$222	
	10020556	Borsada, Minal	CAP	334	\$3	\$2	\$0	1
	10020518	American Pacific Med Grp	CAP	5856562758	\$93	\$48	\$0	40
	10020521	NAFMG (Sugarland)	CAP	2332	\$0	\$0	\$0	0
	1771757	NAFMG (Whistler)	CAP	876647839	\$2333	\$0	\$1	1
	1004665	Young,	CAP		\$1008	\$0	\$0	0

Figure no: CAP Productivity

CAP Productivity will have the following Search filters:

- Group/Doctor Name: User will be able to select the “Group/Doctor Name” from the drop-down List, where all the Group/Doctor Names will be available.
- Ticket No.: User will be able to Enter the “Ticket No.” available.

- CT Posted Date From: User will be able to select the “CT Posted Date From” the Calendar.
- Workflow: User will be able to select the “Work Flows” from the drop-down List, where all Work Flow Names will be available.
- Posted By: User will be able to select the name of user from the “Posted By” drop-down List, where all user’s name will be available.
- Created Date From: User will be able to select the “Created Date From” the Calendar.

User can select desired Search options as required. It is not Mandatory to fill all the Options provided.

After selecting the options, User will click on the “Search” button to search that task as per the Inputs provided. If the User clicks on the “Cancel” button, the selected Filters will be removed instantly.

Searched>List of CAP Productivity Task will be displayed under the following Columns:

- Batch/Ticket#: User will be able to view the “Batch/Ticket” No. of the CAP Productivity under this column.
- Dr. Office: User will be able to view the name of “Dr. Office” under this column.
- Payment Type: User will be able to view the “Payment Type” Name under this column.
- CK Number: User will be able to view the “CK Number” of the CAP Productivity under this column.
- Posted Amt.: User will be able to view the “Posted Amt.” in dollars under this column.

- Elec. Post Amt.: User will be able to view the “Elec. Post Amt.” in dollars under this column.
- Suspense Amt.: User will be able to view the “Suspense Amt.” in dollars under this column.
- Manually: User will be able to view the “Manually” added Amount under this column.
- Scan Date: User will be able to view the “Scan Date” under this column.
- Created By: User will be able to view the “Created By” Name under this column.
- Other Income: User will be able to view the “Other Income”under this column.
- Created Date: User will be able to view the “Created Date” under this column.
- Modified By: User will be able to view the “Modified By” Name under this column.
- Modified On: User will be able to view the “Modified On” Date under this column.
- Posted By: User will be able to view the “Posted By” name under this column.
- Agency money: User will be able to view the “Agency Money” under this column.
- Action: The Action menu will provide following functionalities:
 - Edit: Selecting “Edit” Icon as shown below in Figure , will allow Admin to Edit/Update the information: CK Number, Manually(In USD), Electronically (In USD), Total Posted Amount (In USD), Suspense Amount (In USD), Date Posted, Other Income (In USD), Agency Money (USD), Old Prior AR (In USD), +/- Posting(In USD), Manual Transaction, Electronic

Transaction, Remarks, Offset & Work Flow of the selected ERA Productivity as shown below in Figure: . Fields marked with (*) are mandatory.



Figure :. Edit Icon – Action.

The screenshot shows the 'Update Payment Batch Details (CAP)' window. The top section displays basic information: Ticket Number (10020599), Date Received (05/01/2023), Dr. Office (Vascular and General Surgery Associates), Insurance (Acclaim), Deposit Amount (In USD) (233), and Payment Type (Ancillary Income). The main body of the form contains several groups of input fields:

- CK Number***: Input field containing '21'.
- Other Income: (in USD)**: Input field containing '0'.
- 1. Manually: (in USD)**: Input field containing '0'.
- Agency Money: (in USD)**: Input field containing '0'.
- 2. Electronically: (in USD)***: Input field containing '0'.
- Old prior AR: (in USD)**: Input field containing '0'.
- Total Posted Amount: (in USD)**: Input field containing '0'.
- +/- Posting: (in USD)**: Input field containing '233'.
- 3. Suspend Amount: (in USD)**: Input field containing '0'.
- Manual Transaction**: Input field containing '0'.
- Date Posted***: A date picker set to 5/26/2023.
- Electronic Transaction**: Input field containing '0'.

The bottom section contains three buttons: 'Cancel', 'Update', and 'Refund Request'.

Figure :. Edit/Update Payment Batch Details (CAP)– Action

After Editing/Updating the Edit/Update Payment Batch Details (CAP), User needs to click on “Update” to confirm the changes & if User clicks on “Cancel” option for any changes made will be discarded.

If User click on the “Refund Request” button user will be redirected to “AR-Workflow: Refund” Request as shown above in Figure: . Where user will be able to fill in the details like: Batch No., Refund Letter Date, Page No., Refund Request Amt., Remarks & Status.

After Updating the AR-Workflow: Refund form, User needs to click on “FWD to Payment” which will redirect the user to the Edit/Update Payment Batch Details (CAP) page & if User clicks on “Cancel” option for any changes made will be discarded.

Selecting the “Print Productivity” option will allow the user to print the details as per the requirement.

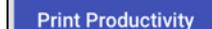


Figure no: Print Productivity – Icon

ARGUS MEDICAL MANAGEMENT, LLC. PAYMENT PRODUCTIVITY TRACKING SYSTEM																	
#ID	Task Number	Dr. Office	Insurance	Ck Number	Deposit Amt	Entered Postd Amt	Elig. Postd Amt	Amnt Postd In CT	Scan Date	Total Time Taken	Missed Trans	Kbs. Trans	Total Trans.	Date Postd	Posted By	Remarks	
205	1002009	Varinder and General Hospital Associates	Aclaim	21	223	0	0	0	05/23/2013	0	0	0	0		Bhupinder Singh	test	
204	1002009	ProHealth	Aclaim	5	328	20	1	21	05/02/2013	22	540	2	547		Irene Ball	test	
202	1002009	Bonita, Med.	Aclaim	324	3	1	2	3	03/26/2013	22	2	2	4		Bhupinder Singh	test	
203	1002018	American Pacific Med	Aclaim	3830462778	81282	45	48	93	03/13/2013	30	0	0	0	03/13/2013	Sandeep Kumar	test	
201	1002011	HAFNI (Desper)	Aclaim	2312	222	0	0	0	03/17/2013	30	0	0	0				
2007	1771757	NAFMG (Whiter)	Pacific Healthcare IPA	2333	2333	0	2333	2333	05/25/2013	30	1	1	2		Bhupinder Singh		
1006	1004003	Young, Herring	Various Insurances	1988	1988	0	1988	1988	06/26/2013	30	3	0	3	06/26/2013	Sandeep Verma		
1005	1002009	Medicine and Nephrology Associates	Lakewood Health Plan	464.5	464.5	0	464	464	06/28/2013	30	3	0	3	06/28/2013	Sandeep Verma		
1004	1002004	Medicine and Nephrology Associates	Brookshire	77.5	77.5	0	77	77	06/28/2013	30	3	0	3	06/28/2013	Sandeep Verma		
1003	1002003	Medicine and Nephrology Associates	St. Mary	354.75	354.75	0	354	354	06/28/2013	30	3	0	3	06/28/2013	Sandeep Verma		
1002	1002001	Medicine and Nephrology Associates	Acute Best Care	1775	1775	0	1775	1775	06/28/2013	30	3	0	3	06/28/2013	Sandeep Verma		
1001	1002009	Medicine and Nephrology Associates	Acute Best Care	300	300	0	300	300	06/28/2013	30	3	0	3	06/28/2013	Sandeep Verma		
1000	1002009	Medicine and Nephrology Associates	Brookshire	116	116	0	116	116	06/28/2013	30	3	0	3	06/28/2013	Sandeep Verma		
1009	1002010	Medicine and Nephrology Associates	Various Insurances	10	10	0	10	10	06/28/2013	30	3	0	3	06/28/2013	Sandeep Verma		
1008	1002010	Medicine and Nephrology Associates	St. Mary	307.25	307.25	0	307	307	06/28/2013	30	3	0	3	06/28/2013	Sandeep Verma		
1007	1002017	Medicine and Nephrology Associates	Lakewood Health Plan	425.5	425.5	0	425	425	06/28/2013	30	3	0	3	06/28/2013	Sandeep Verma		
1006	1002016	Medicine and Nephrology Associates	Alamere	1129	1129	0	1129	1129	06/28/2013	30	3	0	3	06/28/2013	Sandeep Verma		

Figure no: Print Productivity

Selecting the “Excel” option will allow the user to download Excel sheet of the CAP Productivity details as shown below in Figure: .



Figure no: Excel Sheet – Icon

ID	Batch ID	Scan Date	CHS Number	Electronically Manual Tran Payment Pro Is Offset	Remark	Time	Doctor	Created By	Created On	Modified By	Modified On	
2045	10020599	2023-05-23T00:00:00.000Z	21	0	0	3	0 test	22 Proteah	2023/05/26	null null	1970/01/01	
2034	10020590	2023-05-02T00:00:00.000Z	5	2	545	3	0 test	22 Borsada, Minal	2023/05/11	love Balli	2023/05/26	
2022	10020556	2023-02-25T00:00:00.000Z	334	2	2	3	0 test	Bhupender Singh	2023/03/23	Bhupender Singh	2023/03/06	
2015	10020529	2023-02-17T00:00:00.000Z	5856562758	0	0	3	0 Test	30 American Pacific Med Grp	2023/03/17	Bhupender Singh	2023/03/02	
2011	10020521	2023-02-17T00:00:00.000Z	332	0	0	3	0	30 NAMG (Sugarland)	2023/03/19	Bhupender Singh	2023/03/01	
2007	17771737	2013-10-25T00:00:00.000Z	1	1	3	0	0	30 NAMG (Whittier)	2013/10/25	Bhupender Singh	2013/10/10	
1696	1004665	2013-08-25T00:00:00.000Z	876847839	3	3	0	0	30 Young, Hardig	Suresh Verma	2013/08/03	null null	1970/01/01
1695	1005195	2013-08-28T00:00:00.000Z	1	3	3	0	0	30 Medicine and Nephrology Associates	Suresh Verma	2013/08/03	null null	1970/01/01
1693	1005194	2013-08-28T00:00:00.000Z	1	3	3	0	0	30 Medicine and Nephrology Associates	Suresh Verma	2013/08/03	null null	1970/01/01
1692	1005193	2013-08-28T00:00:00.000Z	1	3	3	0	0	30 Medicine and Nephrology Associates	Suresh Verma	2013/08/03	null null	1970/01/01
1691	1005189	2013-08-28T00:00:00.000Z	1	3	3	0	0	30 Medicine and Nephrology Associates	Suresh Verma	2013/08/03	null null	1970/01/01
1690	1005130	2013-08-28T00:00:00.000Z	1	3	3	0	0	30 Medicine and Nephrology Associates	Suresh Verma	2013/08/03	null null	1970/01/01
1689	1005129	2013-08-28T00:00:00.000Z	1	3	3	0	0	30 Medicine and Nephrology Associates	Suresh Verma	2013/08/03	null null	1970/01/01
1688	1005118	2013-08-28T00:00:00.000Z	1	3	3	0	0	30 Medicine and Nephrology Associates	Suresh Verma	2013/08/03	null null	1970/01/01
1687	1005117	2013-08-28T00:00:00.000Z	1	3	3	0	0	30 Medicine and Nephrology Associates	Suresh Verma	2013/08/03	null null	1970/01/01
1686	1005116	2013-08-28T00:00:00.000Z	1	3	3	0	0	30 Medicine and Nephrology Associates	Suresh Verma	2013/08/03	null null	1970/01/01
1685	1005115	2013-08-28T00:00:00.000Z	1	3	3	0	0	30 Medicine and Nephrology Associates	Suresh Verma	2013/08/03	null null	1970/01/01
1684	1005114	2013-08-28T00:00:00.000Z	1	3	3	0	0	30 Medicine and Nephrology Associates	Suresh Verma	2013/08/03	null null	1970/01/01
1683	1004887	2013-08-29T00:00:00.000Z	1	6	3	0	0	30 ProHealth	Suresh Verma	2013/08/03	null null	1970/01/01
1682	1004876	2013-08-28T00:00:00.000Z	1	6	3	0	0	30 ProHealth	Suresh Verma	2013/08/03	null null	1970/01/01
1681	1004956	2013-08-28T00:00:00.000Z	1	3	3	0	0	30 ProHealth	Suresh Verma	2013/08/03	null null	1970/01/01
1680	1004953	2013-08-27T00:00:00.000Z	1	3	3	0	0	30 ProHealth	Suresh Verma	2013/08/03	null null	1970/01/01
1679	1004952	2013-08-27T00:00:00.000Z	1	6	3	0	0	30 ProHealth	Suresh Verma	2013/08/03	null null	1970/01/01
1678	1004939	2013-08-29T00:00:00.000Z	1	3	3	0	0	30 American Pacific Med Grp	Suresh Verma	2013/08/03	null null	1970/01/01
1677	1005559	2013-08-29T00:00:00.000Z	1	3	3	0	0	30 Chen, Hsiao	Suresh Verma	2013/08/03	null null	1970/01/01
1676	1004519	2013-08-28T00:00:00.000Z	1	3	3	0	0	30 Shakhnoush, Mariana VC	Suresh Verma	2013/08/03	null null	1970/01/01
1675	1005180	2013-08-27T00:00:00.000Z	1	3	3	0	0	30 Young, Hardig	Suresh Verma	2013/08/03	null null	1970/01/01
1674	1005179	2013-08-27T00:00:00.000Z	1	3	3	0	0	30 Young, Hardig	Suresh Verma	2013/08/03	null null	1970/01/01
1673	1005178	2013-08-27T00:00:00.000Z	1	3	3	0	0	30 AppleCare Hospitalist Medical Group	Suresh Verma	2013/08/03	null null	1970/01/01
1672	1005171	2013-08-27T00:00:00.000Z	1	3	3	0	0	30 AppleCare Hospitalist Medical Group	Suresh Verma	2013/08/03	null null	1970/01/01
1671	1004591	2013-08-26T00:00:00.000Z	1	3	3	0	0	30 So, Vannanith	Suresh Verma	2013/08/03	null null	1970/01/01
1670	1004589	2013-08-26T00:00:00.000Z	1	3	3	0	0	30 So, Vannanith	Suresh Verma	2013/08/03	null null	1970/01/01
1669	1004588	2013-08-26T00:00:00.000Z	1	3	3	0	0	30 So, Vannanith	Suresh Verma	2013/08/03	null null	1970/01/01
1668	1004584	2013-08-26T00:00:00.000Z	1	26	3	0	0	30 Hwang, Andy	Suresh Verma	2013/08/03	null null	1970/01/01
1667	1004722	2013-08-26T00:00:00.000Z	1	3	3	0	0	30 Hwang, Andy	Suresh Verma	2013/08/03	null null	1970/01/01
1666	1004374	2013-08-26T00:00:00.000Z	1	3	3	0	0	30 So, Vannanith	Suresh Verma	2013/08/03	null null	1970/01/01
1665	1004368	2013-08-26T00:00:00.000Z	1	3	3	0	0	30 So, Vannanith	Suresh Verma	2013/08/03	null null	1970/01/01

Figure no:

- **Payments Process Workflow (ERA):** User will be able to view the following information as shown below in Figure:

- To AR IPA FFS HMO, To AR FFS, To AR CEP, To AR MCL, To AR MCR, To AR WC & Query to TL.


Figure no: Payments Process Workflow (ERA)

After selecting any links mentioned above under “Payment Process Workflow (ERA)”, User will be redirected to the ERA Productivity Page as shown below on Figure: . Where user will be able to view the selected Workflow link Data.

Additionally, User can also Filter Workflow from the ERA Productivity page as well.

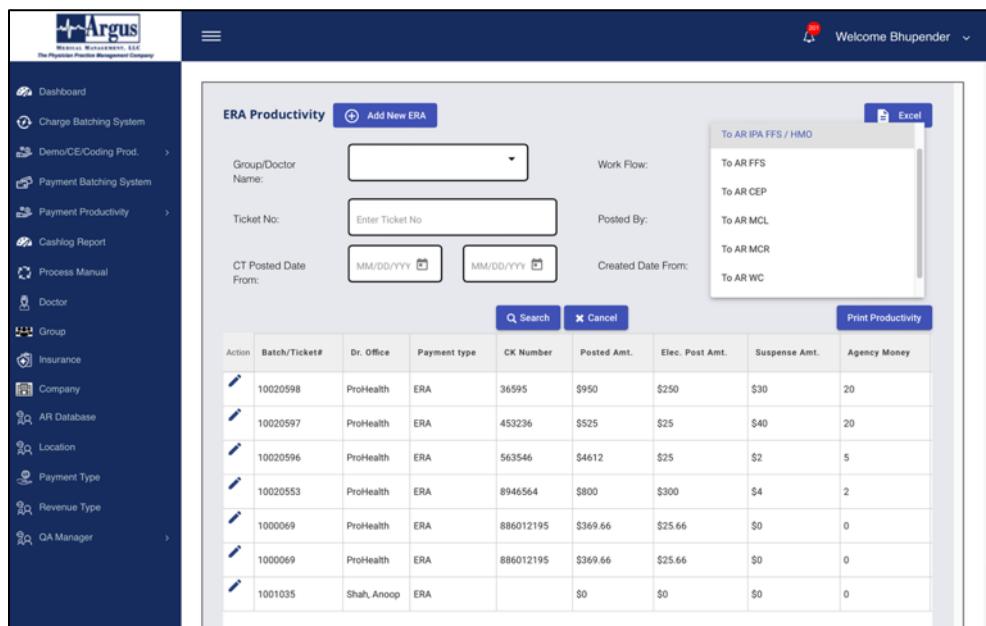


Figure no: ERA Productivity

➤ **Payments Process Workflow (Non-ERA):** User will be able to view the following information as shown below in Figure:

- To AR IPA FFS HMO, To AR FFS, To AR CEP, To AR MCL, To AR MCR, To AR WC & Query to TL.

Payments Process Workflow (Non ERA)	
To AR IPA FFS HMO	208
To AR FFS	1
To AR CEP	0
To AR MCL	4
To AR MCR	1
To AR WC	1
Query to TL	0

Figure no: Payments Process Workflow (Non-ERA)

After selecting any links mentioned above under “Payment Process Workflow (Non-ERA)”, User will be redirected to the Non-ERA Productivity Page as shown below on Figure: . Where user will be able to view the selected Workflow link Data.

Additionally, User can also Filter Workflow from the Non-ERA Productivity page as well.

Figure no: Non-ERA Productivity

- **Payments Process Workflow (CAP):** User will be able to view the following information as shown below in Figure:
- To AR IPA FFS HMO, To AR FFS, To AR CEP, To AR MCL, To AR MCR, To AR WC & Query to TL.

Payments Process Workflow (CAP)	
To AR IPA FFS HMO	0
To AR FFS	1
To AR CEP	2
To AR MCL	3
To AR MCR	0
To AR WC	0
Query to TL	0

Figure no: Payments Process Workflow (CAP)

After selecting any links mentioned above under “Payment Process Workflow (CAP)”, User will be redirected to the CAP Productivity Page as shown below on Figure: . Where user will be able to view the selected Workflow link Data.

Additionally, User can also Filter Workflow from the CAP Productivity page as well.

The screenshot shows the Argus CAP Productivity screen. On the left is a sidebar with various menu items like Dashboard, Charge Batching System, etc. The main area has fields for Group/Doctor Name, Ticket No., and CT Posted Date. To the right is a table of transaction details. A dropdown menu titled 'SELECT WORK FLOW' is open, showing options such as 'To AR IPA FFS / HMO', 'To AR FFS', 'To AR CEP' (which is selected), 'To AR MCL', 'To AR MCR', and 'To AR WC'. At the bottom right of the table is a 'Print Productivity' button.

Figure no: CAP Productivity

- **Coding Correction Log:** User will be able to view the following information as shown below in Figure:
 - Forward to coding correction, escalate to Argus TL, Return to AR, Coding to CE & Done

Coding Correction Log	
Forward to coding correction	7
Escalate to Argus TL	0
Return to AR	0
Coding to CE	0
Done	0

Figure no: Coding Correction Log

Coding Correction Log

After selecting the Link from “Coding Correction Log” menu from Dashboard, User will be redirected to the Coding Correction Log Page as shown below on Figure: . Where user will be able to check the Coding Correction Log of the Tasks.

Additionally, User can also Filter Workflow from the Coding Correction Log page as well.

Action	Status	Patient Name	Patient ID	Batch Number	Sequence Number	Provider	DOS	Team	Attachments	C
✓ Forward to coding correction	Test 20	09032023	222	22		Access PCPInc	03/09/2023	MCL		Bh Sir
✓ Forward to coding correction	Test 20	09032023	222	22		Access PCPInc	03/09/2023	MCL		Bh Sir
✓ Forward to coding correction	Arindham Kumar	98756421	598657	1		NAFMG (Whistler)	03/09/2023	MCL		Bh Sir
✓ Forward to coding correction	test 3	11221122	222	2		Nga, Visal	02/24/2023	MCL		Bh Sir
✓ Forward to coding correction	Test 112	2402202301	222	2		NAFMG (Whistler)	02/24/2024	MCL		Bh Sir
✓ Forward to coding correction	Test 112	2402202301	222	22		NAFMG (Whistler)	02/24/2024	MCL		Bh Sir

Figure no: Coding Correction Log

Coding Correction Log will have the following Search filters:

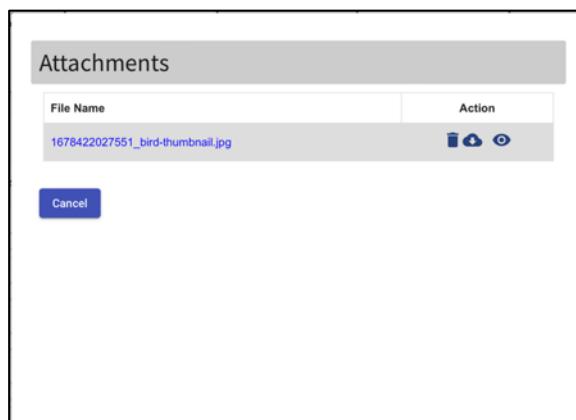
- Keyword: User will be able search the Correction Log using keyword.
- Workflow: User will be able to select the “Workflows” from the drop-down List, where all Workflow Names will be available.
- Team: User will be able to select the “Team” from the drop-down List, where all Team Names will be available.
- Logged Date From: User will be able to select the “Logged Date From” the Calendar.
- Logged Date To: User will be able to select the “Logged Date To” the Calendar.

User can select desired Search options as required. It is not Mandatory to fill all the Options provided.

After selecting the options, User will click on the “Search” button to search that task as per the Inputs provided. If the User clicks on the “Cancel” button, the selected Filters will be removed instantly.

Searched/List of Code Correction Log will be displayed under the following Columns:

- Status: User will be able to view the “Status” of the selected Coding Correction Log under this column.
- Patient Name: User will be able to view the “Patient Name” of the selected Coding Correction Log under this column.
- Patient ID: User will be able to view the “Patient ID” of the selected Coding Correction Log under this column.
- Batch Number: User will be able to view the “Batch Number” of the selected Coding Correction Log under this column.
- Sequence Number: User will be able to view the “Sequence Number” of the selected Coding Correction Log under this column.
- Provider: User will be able to view the “Provider” of the selected Coding Correction Log under this column.
- Team: User will be able to view the “Team” of the selected Coding Correction Log under this column.
- Attachments: User will be able to view the “Attachment” of the selected Coding Correction Log under this column as shown below in Figure: . Also, User will be able to Delete, Download and View the Attachment.

**Figure no: Attachments**

- Created By: User will be able to view the “Created By” person’s name of the selected Coding Correction Log under this column.
- Created On: User will be able to view the “Created On” Date of the selected Coding Correction Log under this column.
- Action: The Action menu will provide following functionalities:
 - Edit: Selecting “Edit” Icon as shown below in Figure , will allow Admin to Edit/Update the information: Insurance, Provider(Doctor Office), DOS, CPT Code, Batch No., Sequence Number, Attachments, Next action step, Balance amount & Coding remarks as shown below in Figure:.. Fields marked with (*) are mandatory.

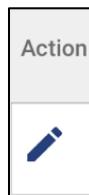


Figure .: Edit Icon – Action.

Coding Correction

Patient Name: Test 20 Patient ID: 09032023
 Insurance: Acclaim Group/Doctor Name: Access PCP,Inc
 Balance Amount (in USD): \$2 Remarks: test
 CPT: DOS: 03/09/2023

Insurance*	<input type="text" value="Acclaim"/>	Provider(Doctor Office)*	<input type="text" value="Access PCP,Inc"/>
DOS	<input type="text" value="03/09/2023"/>	CPT Code*	<input type="text" value="Enter CPT"/>
Batch No	<input type="text" value="222"/>	Sequence Number	<input type="text" value="22"/>
Attachments	File Name <input type="text"/> Action <input type="button" value="No Attachments Found"/>		
Next Action Step*	<input type="button" value="Forward to coding correction"/> Balance Amount* <input type="text" value="2"/>		
Coding Remarks*	<input type="text" value="Enter Coding Remark"/>		

Figure .: Edit/Update Coding Correction– Action

After Editing/Updating the Edit/Update Coding Correction, User needs to click on “Submit” to confirm the changes & if User clicks on “Cancel” option for any changes made will be discarded.

Selecting the “Excel” option will allow the user to download Excel sheet of the Coding Correction Log details as shown below in Figure: .

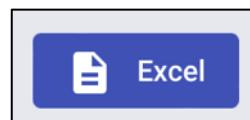


Figure no: Excel Sheet - Icon

ID	Patient Acco	Patient Nam	Status	Code	Source	Provider ID	Balance Amo	DOS	CPT	All Database Team	Doctor	Insurance	Created By	Created On	Modified By	Modified On
1220871	894956833	ssd	API	Aging Report	260		13/11/2023		2 Greater LB I HMO	Abary, Alexa	1st Med Insu	Bhupender S	2023/06/02	Bhupender S	2023/06/06	
1220854	9912122	love	API	Incoming Cal	159		05/10/2023		4 Greater LB I HMO	Abassi, Abd.	1st Med Insu	Bhupender S	2023/05/30	Bhupender S	2023/05/30	
1220851	6867789078	Fc Barcelona	ADJ	Dr Report	260		11/11/2022		1 Ajay Patel I HMO	Abary, Alexa	AARP2	null null	2022/12/15	Bhupender S	2023/05/29	
1220850	22332323434	test 2222	API	Dr Report	159		05/29/2023		1 Greater LB I MCL	Abassi, Abd.	Access	null null	2022/12/15	null null	1970/01/01	
1220844	34625252	Test 223	BCP	Email	2		05/26/2023		2 ProHealth Pa MCL	ABC	AARP2	Bhupender S	2023/05/26	Bhupender S	2023/05/29	
1220842	2299934	test may jun	BCP	Email	353		05/25/2023		3 Advanced De MCL	Aboshadayin	Access	Bhupender S	2023/05/25	Bhupender S	2023/05/25	
1220823	3896321	GUJNEISH	ADJ	Aging Report	159		03/14/2023		3 Ajay Patel I HMO	Abassi, Abd.	1st Med Insu	Bhupender S	2023/03/14	Bhupender S	2023/06/01	
1220823	09002023	Test 20	API	Email	434		03/09/2023		1 Abary, Alexa MCL	Access PCP A	Acclaim	null null	2022/12/13	Bhupender S	2023/04/25	
1220823	09002023	Test 20	API	Email	434		03/09/2023		1 Abary, Alexa MCL	Access PCP A	Acclaim	Bhupender S	2023/03/10	null null	1970/01/01	
1220823	09002023	Test 20	API	Email	434		03/09/2023		1 Abary, Alexa MCL	Access PCP A	Acclaim	Bhupender S	2023/03/10	null null	1970/01/01	
1220823	09785421	Arindham Ku ADJ	Aging Report		2		03/09/2023		3 Ajay Patel I MCL	ABC	AARP2	null null	2023/12/12	null null	1970/01/01	
1220822	98754421	Arindham Ku ADJ	Aging Report		2		03/09/2023		3 Ajay Patel I MCL	ABC	AARP2	Bhupender S	2023/03/09	null null	1970/01/01	
1220818	1122122	test 3	BCP	Faxes	520		02/24/2023		2 Abary, Alexa MCL	Nga, Visual	Access	Bhupender S	2023/02/24	null null	1970/01/01	
1220817	2402202301	Test 112	ADJ	Email	129		02/24/2024		2 Abary, Alexa MCL	NAFMG	(W/H Access	null null	2022/12/08	null null	1970/01/01	
1220817	2402202301	Test 112	ADJ	Email	129		02/24/2024		2 Abary, Alexa MCL	NAFMG	(W/H Access	Bhupender S	2023/02/24	null null	1970/01/01	
1220817	2402202301	Test 112	ADJ	Email	129		02/24/2024		2 Abary, Alexa MCL	NAFMG	(W/H Access	Bhupender S	2023/02/24	null null	1970/01/01	
1220815	844122	soham	ADJ	Aging Report	29		25/11/2022		2 Ajay Patel M HMO	Ibarra, Rodol	1st Med Insu	null null	2022/11/25	null null	1970/01/01	
1220814	1230	reyaz	ADJ	Aging Report	29		24/11/2022		2 Advanced De HMO	Ibarra, Rodol	1st Med Insu	null null	2022/11/24	null null	1970/01/01	

Figure no: Downloaded Excel Sheet

➤ **Offset Reference & Postings:** User will be able to view the following information as shown below in Figure:

- Offset Reference List, Offset Reference Pending, Offset Reference AR Step Completed & Offset Reference offset.

Offset Reference & Postings	
Offset Reference List	6546
Offset Reference Pending	17
Offset Reference AR Step Completed	14
Offset Reference Offset Resolved	6515

Figure no: Offset Reference & Postings

1. Offset List

Add Offset

This page will appear after selecting “Add New” from the Offset List Menu and user will be redirected to “Add Offset” page as shown below in the figure: .. The fields marked with (*) are mandatory fields.

The screenshot shows a web-based application interface for adding an offset. The main title is "Add Offset". There are several input fields and buttons:

- Ticket Number:** An input field with a "Get Detail" button to its right.
- Dr. Office:** A dropdown menu.
- Insurance:** A dropdown menu.
- Deposit Amount (In USD):** An input field.
- Check Number***:
- Input field: "Enter Check Number".
- Label: "Check Number*" with a red asterisk.
- Patient Name**:
- Input field: "Enter Patient Name".
- Check Date***:
- Input field: "MM/DD/YYYY" with a calendar icon.
- Label: "Check Date*" with a red asterisk.
- Account Number**:
- Input field: "Enter Account Number".
- Remarks**:
- Input field: "Enter Remarks".

At the bottom are two buttons: "Cancel" and "Add".

Figure ..:: Add Offset

After providing all the information, User needs to click “Add” button to confirm the changes & “Cancel” button will discard all the changes.

After selecting any Link from the “Offset Reference & Posting” menu from Dashboard, User will be redirected to the “Offset List” Page as shown below on Figure: . Where user will be able to view the Offset list as per selected link.

Additionally, User can also Filter Workflow from the “Offset List” page as well.

Action	Batch/Ticket No.#	Patient Name	Insurance	Doctor/Group Name	Status	Offset Ticket No.	Account. No.	Total Amt
	1061528	0.0	0.0	0.0	Offset Resolve	Offset Resolve	57616846	\$11204935
	1001189	0.0	0.0	0.0	Offset Resolve	Offset Resolve	5870662	\$88603876
	1001230	0.0	0.0	0.0	Offset Resolve	Offset Resolve	5870662	\$88603875
	1023713	0.0	0.0	0.0	Offset Resolve	Offset Resolve	44566938	\$03662050
						Offset		

Figure no: Offset List

Offset List will have the following Search filters:

- Ticket No: User will be able to search the patient by entering “Ticket No.”.
- Patient Name/Acc. No.: User will be able to search the patient by entering “Patient Name”.
- Offset Ticket No.: User will be able to search the patient by entering “Offset Ticket No.”.
- Check No.: User will be able to search the patient by entering “Check No.”.
- Posted From: User will be able to enter the Date in “Posted From” option.
- Posted To: User will be able to enter the Date in “Posted To” option.
- Posted By: User will be able to enter the Name of the person in “Posted By” option.
- Group/Doctor Name: User will be able to enter the Name of the Doctor in “Group/Doctor Name” option.

- Insurance Name: User will be able to enter the Name of the Insurance in “Insurance Name” option.
- Status: User will be able to enter the Status in “Status” option.

User can select desired Search options as required. It is not Mandatory to fill all the Options provided.

After selecting the options, User will click on the “Search” button to search that task as per the Inputs provided. If the User clicks on the “Cancel” button, the selected Filters will be removed instantly.

Searched/List Offset List will be displayed under the following Columns:

- Batch/Ticket No.: User will be able to view the “Batch/Ticket No.” under this column.
- Patient Name: User will be able to view the “Patient Name” under this column.
- Insurance: User will be able to view the “Insurance” under this column.
- Doctor/Group Name: User will be able to view the “Doctor/Group Name” under this column.
- Status: User will be able to view the “Status” under this column.
- Offset Ticket No.: User will be able to view the “Offset Ticket No.” under this column.
- Account No.: User will be able to view the “Account No.” under this column.
- Total Amount: User will be able to view the “Total Amount” under this column.
- Check No.: User will be able to view the “Check No.” under this column.
- Posted Date: User will be able to view the “Posted Date” under this column.

- Posted Date: User will be able to view the “Posted By” Name under this column.
- Remarks: User will be able to view the “Reviews” under this column.
- Action: The Action menu will provide following functionalities:
 - Edit: Selecting “Edit” Icon as shown below in Figure , will allow user to Edit/Update the information: Check Number, Check Date, Patient Name, Account Number & Remarks as shown below in Figure:.. Fields marked with (*) are mandatory.

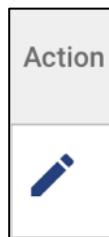


Figure .: Edit Icon – Action.

The screenshot shows a modal dialog box titled "Update Offset". Inside the dialog, there are several input fields and dropdown menus:

- Check Number***: An input field labeled "Enter Check Number".
- Patient Name**: An input field labeled "Enter Patient Name".
- Remarks**: A large text area labeled "Enter Remarks".
- Check Date***: A date picker input field labeled "MM/DD/YYYY".
- Account Number**: An input field labeled "Enter Account Number".
- Deposit Amount(In USD)**: A dropdown menu currently showing "0".

At the bottom of the dialog are two buttons: "Cancel" and "Update".

Figure .: Edit/Update Offset– Action

After Editing/Updating the Edit/Update Offset List, User needs to click on “Update” to confirm the changes & if User clicks on “Cancel” option for any changes made will be discarded.

- **Rekey Request Log:** User will be able to view the following information as shown below in Figure:
- Query to Charge Entry, Return to AR & Closed.

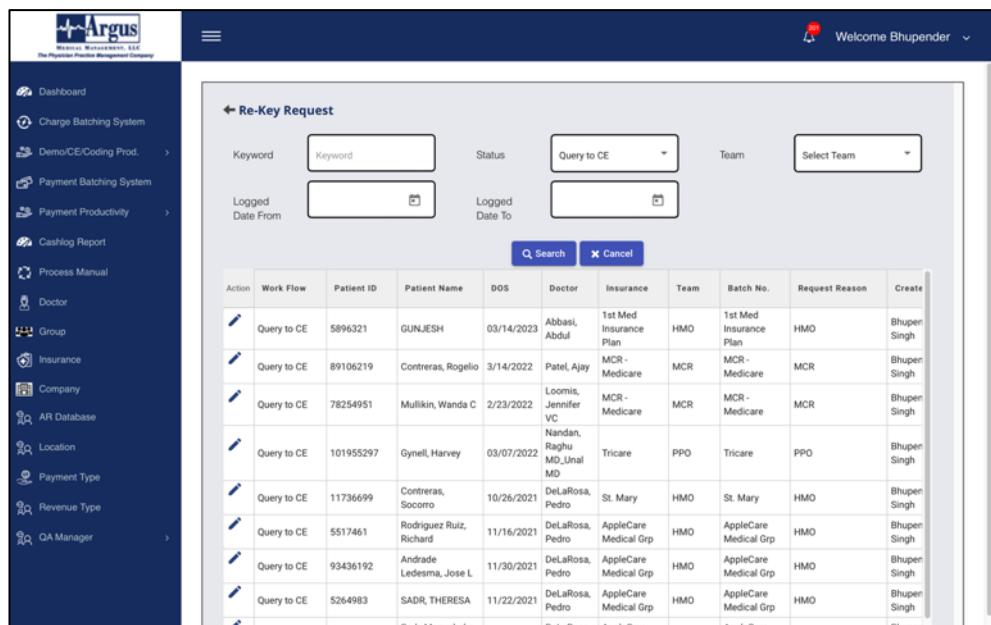
Rekey Request Log	
Query to Charge Entry	43
Return to AR	4
Closed	328

Figure no: Rekey Request Log

1. Rekey Request Log

After selecting any Link from the “Rekey Request Log” menu from Dashboard, User will be redirected to the “Re-Key Request” Page as shown below on Figure: . Where user will be able to view the Re-Key Request list as per selected link.

Additionally, User can also Filter Status from the “Re-Key Request” page as well.



The screenshot shows the Argus software interface. On the left, there is a sidebar with various menu items: Dashboard, Charge Batching System, Demo/CE/Coding Prod., Payment Batching System, Payment Productivity, Cashlog Report, Process Manual, Doctor, Group, Insurance, Company, ARI Database, Location, Payment Type, Revenue Type, and QA Manager. The main area is titled "Re-Key Request" and contains a search form with fields for Keyword, Status (set to "Query to CE"), Team (set to "Select Team"), and date filters for Logged Date From and Logged Date To. Below the form is a table listing eight re-key requests. Each row in the table includes an action column with a pencil icon, Work Flow, Patient ID, Patient Name, DOS, Doctor, Insurance, Team, Batch No., Request Reason, and Create. The data in the table is as follows:

Action	Work Flow	Patient ID	Patient Name	DOS	Doctor	Insurance	Team	Batch No.	Request Reason	Create
	Query to CE	5896321	GUNJESH	03/14/2023	Abbasi, Abdul	1st Med Insurance Plan	HMO	1st Med Insurance Plan	HMO	Bhupen Singh
	Query to CE	89106219	Contreras, Rogelio	3/14/2022	Patel, Ajay	MCR - Medicare	MCR	MCR - Medicare	MCR	Bhupen Singh
	Query to CE	78254951	Mullikin, Wanda C	2/23/2022	Loomis, Jennifer VC	MCR - Medicare	MCR	MCR - Medicare	MCR	Bhupen Singh
	Query to CE	101955297	Gynell, Harvey	03/07/2022	Nandan, Raghu MD_Uhal MD	Tricare	PPO	Tricare	PPO	Bhupen Singh
	Query to CE	11736699	Contreras, Socorro	10/26/2021	Delarosa, Pedro	St. Mary	HMO	St. Mary	HMO	Bhupen Singh
	Query to CE	5517461	Rodriguez Ruiz, Richard	11/16/2021	Delarosa, Pedro	AppleCare Medical Grp	HMO	AppleCare Medical Grp	HMO	Bhupen Singh
	Query to CE	93436192	Andrade Ledesma, Jose L	11/30/2021	Delarosa, Pedro	AppleCare Medical Grp	HMO	AppleCare Medical Grp	HMO	Bhupen Singh
	Query to CE	5264983	SADR, THERESA	11/22/2021	Delarosa, Pedro	AppleCare Medical Grp	HMO	AppleCare Medical Grp	HMO	Bhupen Singh

Figure no: Re-Key Request

Re-Key Request will have the following Search filters:

- Keyword: User will be able to search the patient by entering “Keyword”.
- Status: User will be able to Select the Status in “Status” drop-down option.
- Team: User will be able to Select the Team in “Team” drop-down option.
- Logged Date From: User will be able to select the date from “Logged-Date From” option.
- Logged Date To: User will be able to select the date from “Logged-Date To” option.

User can select desired Search options as required. It is not Mandatory to fill all the Options provided.

After selecting the options, User will click on the “Search” button to search that task as per the Inputs provided. If the User clicks on the “Cancel” button, the selected Filters will be removed instantly.

Searched/List Re-Key Request will be displayed under the following Columns:

- Workflow: User will be able to view the “Workflow” under this column.
- Patient ID: User will be able to view the “Patient ID” under this column.
- Patient Name: User will be able to view the “Patient Name” under this column.
- DOS: User will be able to view the “DOS” date under this column.
- Doctor Name: User will be able to view the “Doctor Name” under this column.
- Insurance: User will be able to view the “Insurance” under this column.
- Team Name: User will be able to view the “Team Name” under this column.

- Batch No.: User will be able to view the “Batch No.” under this column.
- Request Reason: User will be able to view the “Request Reason” under this column.
- Created By: User will be able to view the “Created By” name under this column.
- Created On: User will be able to view the “Created On” Date under this column.
- Action: The Action menu will provide following functionalities:
 - Edit: Selecting “Edit” Icon as shown below in Figure , will allow user to Edit/Update the information: Insurance, Provider(Doctor Office), DOS, CPT No. Status, Balance Amount, Batch Number, Reason for Request, Change Posting Remarks & Coding Remarks as shown below in Figure:.. Fields marked with (*) are mandatory.



Figure .: Edit Icon – Action.

Re-Key Request

Patient Name: Test 20 Insurance: Acclaim Balance Amount (in USD): \$ CPT No.: 1	Patient ID: 09032023 Provider (Doctor Office): Access PCP,Inc Remarks: DOS: 03/09/2023
Insurance* <input type="text" value="Acclaim"/>	Provider(Doctor Office)* <input type="text" value="Access PCP,Inc"/>
DOS* <input type="text" value="03/09/2023"/>	CPT No.* <input type="text" value="1"/>
Status* <input type="text" value="Return to AR"/>	Balance Amount* <input type="text" value="2"/>
Batch Number* <input type="text" value="Enter Batch Number"/>	Reason For Request* <input type="text" value="Claim Denial"/>
Charge Posting Remarks <input type="text" value="Enter Charge Posting Remarks"/>	
Coding Remarks <input type="text" value="Enter Coding Remarks"/>	
<input type="button" value="Cancel"/> <input type="button" value="Update"/>	

Figure .: Edit/Update Re-Key Request– Action

After Editing/Updating the Edit/Update Re-Key Request, User needs to click on “Update” to confirm the changes & if User clicks on “Cancel” option for any changes made will be discarded.

- **Adjustment Log:** User will be able to view the following information as shown below in Figure:
 - Adjustment Log [List All], Timely Filing & Without Timely Filing.

Adjustment Log	
Adjustment Log [List All]	1171
Timely Filing	0
Without Timely Filing	1160

Figure no: Adjustment Log

1. Adjustment Log

After selecting any Link from the “Adjustment Log” menu from Dashboard, User will be redirected to the “Adjustment Log” Page as shown below on Figure: . Where user will be able to view the Re-Key Request list as per selected link.

Additionally, User can also Filter Workflow from the “Adjustment Log” page as well.

Action	Work Flow	Patient ID	Patient Name	DOS	CPT Code	AR Database	Insurance	Team	Doctor	Source	Balance
Escalate	12332	rrrr		07/20/2023	AD0033	Ajay Patel MD, A Professional Medical Corp	AARP2	MCL	Abbas, Abdul	Dr. Report	96
Escalate	21412223	YES learn		07/19/2023	AHDH4222	Advanced Dermatology Care Center	Acclaim	PPO	Aboshady	In Patient Services	33
Escalate	23123	Test Umesh		7/17/2023	DD0022	Gupta, Rishi MD	Affordable Benefit Administrator	Self Pay and CEP	Ashokshy	In Patient Services	2
Escalate	99999	Test Dashboard		07/14/2023	ASGG100	Abari, Alexander MD	Access	MCR	Ashokshy	In Patient Services	2
Approve	9927588	Mukesh		7/14/2023	A76	Greater LB Orthopaedic & Medical Group A Ptnrsip	Affiliated Physicians IPA	PPO	Abbas, Abdul	Email	900
Escalate	21344	test 11125		07/13/2023	AD0444	Advanced Dermatology Care Center	Account	MCL	Aboshady, Moustafa	Faxes	44

Figure no: Adjustment Log

Adjustment will have the following Search filters:

- Keyword: User will be able to search the patient by entering “Keyword”.
- Workflow: User will be able to Select the Workflow in “Workflow” drop-down option.
- Team: User will be able to Select the Team in “Team” drop-down option.
- Logged Date From: User will be able to select the date from “Logged-Date From” option.
- Logged Date To: User will be able to select the date from “Logged-Date To” option.
- Timely Filling/ Without Timely Filling: User will be able to filter the Adjustment Log by selecting “Timely Filling/ Without Timely Filling” Check Box option.

User can select desired Search options as required. It is not Mandatory to fill all the Options provided.

After selecting the options, User will click on the “Search” button to search that task as per the Inputs provided. If the User clicks on the “Cancel” button, the selected Filters will be removed instantly.

Searched/List Application Log will be displayed under the following Columns:

- Workflow: User will be able to view the “Workflow” under this column.
- Patient ID: User will be able to view the “Patient ID” under this column.
- Patient Name: User will be able to view the “Patient Name” under this column.
- DOS: User will be able to view the “DOS” date under this column.

- CPT Code: User will be able to view the “CPT Code” under this column.
- AR Database: User will be able to view the “AR Database” under this column.
- Insurance: User will be able to view the “Insurance” under this column.
- Team Name: User will be able to view the “Team Name” under this column.
- Source.: User will be able to view the “Source.” under this column.
- Balance: User will be able to view the “Balance” under this column.
- Created By: User will be able to view the “Created By” name under this column.
- Created On: User will be able to view the “Created On” Date under this column.
- Action: The Action menu will provide following functionalities:
 - Edit: Selecting “Edit” Icon as shown below in Figure , will allow user to Edit/Update the information: Insurance, Provider(Doctor Office), DOS, CPT Code, Balance Amount, & Remarks as shown below in Figure:.. Fields marked with (*) are mandatory.



Figure :. Edit Icon – Action.

Adjustment Log		
Patient Name:	sdvkjlsdvbhuisadhnipv	
Insurance:	AARP2	
Balance Amount (in USD):	\$02	
CPT:		
Timely Filing:	No	
Patient ID:	53671236757	
Provider (Doctor Office):	Abary, Alexander	
Remarks:	adj log	
DOS:	06/06/2023	
Insurance*	AARP2	Provider(Doctor Office)*
DOS*	06/06/2023	CPT Code*
Status*	Select Status	Balance Amount*
Remarks*	adj log	

Figure .: Edit/Update Adjustment Log– Action

After Editing/Updating the Edit/Update Re-Key Adjustment Log, User needs to click on “Update” to confirm the changes & if User clicks on “Cancel” option for any changes made will be discarded.

Selecting the “Excel” option will allow the user to download Excel sheet of the Adjustment Log details as shown below in Figure: .

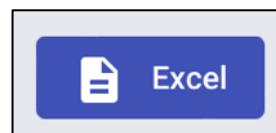


Figure no: Excel Sheet - Icon

ID	Patient Account Number	Patient Name	Status Code	Source	Provider ID	Balance Amt DOS	CPT	AR Database	Team	Doctor	Insurance	Created By	Created On	Modified By	Modified On
1220875	53671236757	sdvkjldvbuiaidhnpix	ADI	Aging Report	260	2	06/06/2023	1 Ajay Patel MD, A Professional Medical Corp	HMO	Abany, Alexa	AARP2	Bhupender S	2023/06/08	null null	1970/01/01
1220871	894956833	ssd	APL	Aging Report	260	2	23/11/2023	2 Greater LB Ortho Surgical & Medical Group A Ptnshp	HMO	Abany, Alexa	1st Med Insu	Bhupender S	2023/06/02	Bhupender Singh	2023/06/05
1220870	536712365165	dhnehh kr	APL	Aging Report	260	2	23/11/2023	3 Abhay, Abhishek	HMO	Abbas, Abdi	AARP2	Bhupender S	2023/06/08	null null	1970/01/01
1220858	919191	lssdfert	ADI	Aging Report	159	20	03/11/2023	2 Greater LB Ortho Surgical & Medical Group A Ptnshp	MCL	Abbas, Abdi	AARP2	Bhupender S	2022/12/16	null null	1970/01/01
1220854	991212123	love	APL	Incoming Call	159	60	05/10/2023	2 Greater LB Ortho Surgical & Medical Group A Ptnshp	HMO	Abbas, Abdi	1st Med Insu	Bhupender S	2022/12/15	Bhupender Singh	2023/05/30
1220854	99121212	love	APL	Incoming Call	159	60	05/10/2023	4 Greater LB Ortho Surgical & Medical Group A Ptnshp	HMO	Abbas, Abdi	1st Med Insu	Bhupender S	2023/05/30	null null	1970/01/01
1220853	5846561	abc	APL	Aging Report	260	701	aa	7 Greater LB Ortho Surgical & Medical Group A Ptnshp	HMO	Abany, Alexa	AARP2	Bhupender S	2023/05/30	Bhupender Singh	2023/05/30
1220852	9026218	Tester	APL	Dr. Reports	345	90	05/10/2023	8 Greater LB Ortho Surgical & Medical Group A Ptnshp	MCL	Ahn, Doan	AARP2	Bhupender S	2023/05/30	Bhupender Singh	2023/05/30
1220851	686778907890789	Fc Barcelona	ADI	Dr. Reports	260	10	11/11/2022	1 Ajay Patel MD, A Professional Medical Corp	HMO	Abany, Alexa	AARP2	null null	2022/12/15	Bhupender Singh	2023/05/29
1220844	346932324345	test 122	APL	Dr. Reports	159	1	05/11/2023	1 Greater LB Ortho Surgical & Medical Group A Ptnshp	MCL	Abbas, Abdi	Access	null null	2022/12/15	Bhupender Singh	2023/05/30
1220843	2323	Test 123	BCP	Email	2	710	05/06/2023	2 ProHealth Health System & Medical Group A Ptnshp	MCL	Abbas, Abdi	Access	null null	2022/12/15	Bhupender Singh	2023/05/30
1220842	2299934	test manje	BCP	Email	353	3	05/15/2023	3 Advanced Dermatology Care Center	MCL	Abobadhy, In	Access	Bhupender S	2023/05/15	Bhupender Singh	2023/05/15
1220841	2299933	Test May	BPT	Email	2	2	05/21/2023	2 American Pacific Medical Group Inc	MCR	ABC	AARP2	Bhupender S	2023/05/25	null null	1970/01/01
1220840	55110987	test May 3	BCP	Faxes	2	2	05/25/2023	2 Abary, Alexander MD	PPD	ABC	Access	null null	2022/12/14	null null	1970/01/01
1220839	55443322	Test May	APL	Email	2	2	05/26/2023	2 Abary, Alexander MD	PPD	ABC	Access	Bhupender S	2023/05/24	Bhupender Singh	2023/05/29
1220838	111	111	ADI	Aging Report	260	11	11/11/2023	11 Ajay Patel MD, A Professional Medical Corp	HMO	Abany, Alexa	1st Med Insu	Bhupender S	2023/05/24	null null	1970/01/01
1220837	111111111111	treck	BPT	Faxes	2	2	05/26/2023	3 Advanced Dermatology Care Center	MCL	Abobadhy, In	Access	Bhupender S	2023/05/15	Bhupender Singh	2023/05/15
1220831	66334422	Ten Patient 1	SP-STB	Faxes	260	2	05/27/2023	2 Abare, Moti S M D Inc	MCR	ABC	AARP2	Bhupender S	2023/05/25	null null	1970/01/01
1220828	5896321	GUNISH	ADI	Aging Report	159	5698	03/14/2023	3 Ajay Patel MD, A Professional Medical Corp	HMO	Abbas, Abdi	1st Med Insu	Bhupender S	2023/03/14	Bhupender Singh	2023/05/05
1220823	09032023	Test 20	APL	Email	434	2	03/09/2023	1 Abary, Alexander MD	MCL	Access PCP, J	Acclaim	null null	2022/12/13	Bhupender Singh	2023/03/10
1220823	09032023	Test 20	APL	Email	434	2	03/09/2023	1 Abary, Alexander MD	MCL	Access PCP, J	Acclaim	Bhupender S	2023/03/03	10	1970/01/01
1220822	98756421	Arindham Kumar	ADI	Aging Report	2	6585	03/10/2023	3 Ajay Patel MD, A Professional Medical Corp	MCL	ABC	AARP2	null null	2022/12/12	Bhupender Singh	2023/04/26
1220822	98756421	Arindham Kumar	ADI	Aging Report	2	6585	03/09/2023	3 Ajay Patel MD, A Professional Medical Corp	MCL	ABC	AARP2	Bhupender S	2023/03/09	null null	1970/01/01
1220817	2402202301	Test 112	ADI	Email	129	2	03/24/2024	2 Abary, Alexander MD	MCL	NAM-NG	Wk Access	null null	2022/12/24	Bhupender Singh	2023/02/24
1220817	2402202301	Test 112	ADI	Email	129	2	03/24/2024	2 Abary, Alexander MD	MCL	NAM-NG	Wk Access	Bhupender S	2022/12/24	null null	1970/01/01
1220815	844122	suham	ADI	Aging Report	39	34	25/11/2022	2 Ajay Patel MD, A Professional Medical Corp 123	HMO	Ibarra, Rodo	1st Med Insu	null null	2022/11/25	null null	1970/01/01
1220814	1220	reyaz	ADI	Aging Report	29	1	24/11/2022	2 Advanced Dermatology Care Center	HMO	Ibarra, Rodo	1st Med Insu	null null	2022/11/24	null null	1970/01/01

Figure no: Downloaded Excel Sheet

➤ **Adjustment Log Timely Filing:** User will be able to view the following information as shown below in Figure:

- Approved, Escalate, Reject & Closed

Adjustment Log Timely Filing		
Approved	0	
Escalate	0	
Reject	0	
Closed	25	

Figure no: Adjustment Log Timely Filing

On click of the above-mentioned links under “Adjustment Log Timely Filing”, As shown above in Figure: (Ref. Adjustment Log) User will be redirected to that detailed page where “Timely Filing” Adjustment Log will be displayed.

Also, “Timely Filing” filter can be accessed through the “Adjustment Log” screen.

- **Adjustment Log Without Timely Filing:** User will be able to view the following information as shown below in Figure:

- Approved, Escalate, Reject & Closed

Adjustment Log Without Timely Filing	
Approved	7
Escalate	52
Reject	10
Closed	33365

Figure no: Adjustment Log Without Timely Filing

On click of the above-mentioned links under “Adjustment Log Without Timely Filing”, As shown above in Figure: (Ref. Adjustment Log) User will be redirected to that detailed page where “Without Timely Filing” Adjustment Log will be displayed.

Also, “Without Timely Filing” filter can be accessed through the “Adjustment Log” screen.

- **Payment Posting Offset Log:** User will be able to view the following information as shown below in Figure:

- Offsets Pending, Offsets Approved & Offsets Completed.

Payment Posting Offset Log	
Offsets Pending	8
Offsets Approved	0
Offsets Completed	308

Figure no: Payment Posting Offset Log**1. Payment Posting Workflow**

After selecting any Link from the “Payment Posting Offset Log” menu from Dashboard, User will be redirected to the “Payment Posting Workflow” Page as shown below on Figure: . Where user will be able to view the Payment Posting Workflow list as per selected link.

Action	Status	Patient Name	Patient ID	CPT	Provider	Insurance	DOS	Team	Billed Amt.	Amount Paid By Prima
<input checked="" type="checkbox"/>	Pending	ssd	894956833		Abary, Alexander	1st Med Insurance Plan	12/11/2023	HMO	\$233	\$1
<input checked="" type="checkbox"/>	Pending	Fc Barcelona	6865778907890789		Abary, Alexander	AARP2	11/11/2022	HMO	\$10	\$3
<input checked="" type="checkbox"/>	Pending	Test 123	34625252		ABC	AARP2	05/26/2023	MCR	\$710	\$2

Figure no: Payment Posting Workflow

Payment Posting Workflow will have the following Search filters:

- Keyword: User will be able to search the patient by entering “Keyword”.
- Provider (Doctor Office): User will be able to Select the Provider in “Provider (Doctor Office)” drop-down option.

- Team: User will be able to Select the Team in “Team” drop-down option.
- Insurance: User will be able to Select the Insurance in “Insurance” drop-down option.
- Logged Date From: User will be able to select the date from “Logged-Date From” option.
- Logged Date To: User will be able to select the date from “Logged-Date To” option.
- Status: User will be able to Select the Status from “Status” drop-down option.

User can select desired Search options as required. It is not Mandatory to fill all the Options provided.

After selecting the options, User will click on the “Search” button to search that task as per the Inputs provided. If the User clicks on the “Cancel” button, the selected Filters will be removed instantly.

Searched/List Payment Posting Workflow Log will be displayed under the following Columns:

- Status: User will be able to view the “Status” under this column.
- Patient ID: User will be able to view the “Patient ID” under this column.
- Patient Name: User will be able to view the “Patient Name” under this column.
- CPT: User will be able to view the “CPT” under this column.
- Provider: User will be able to view the “Provider” Name under this column
- Insurance: User will be able to view the “Insurance” under this column.
- DOS: User will be able to view the “DOS” date under this column.
- Team Name: User will be able to view the “Team Name” under this column.

- Billed Amount: User will be able to view the “Build Amount” in dollars under this column.
- Amount paid by Primary: User will be able to view the “Amount paid by Primary” in dollars under this column.
- Amount paid by Secondary: User will be able to view the “Amount paid by Secondary” in dollars under this column.
- Contractual Adjustment: User will be able to view the “Contractual Adjustment” under this column.
- Bulk Amount of Payment: User will be able to view the “Bulk Amount of Payment” under this column.
- Patient response: User will be able to view the “Patient Response” under this column.
- Date Check Cashed: User will be able to view the “Date Check Cashed” under this column.
- Date Check send to: User will be able to view the “Date Check send to” under this column.
- Copy of cancel check: User will be able to view the “Copy of cancel check” under this column.
- EOB: User will be able to view the “EOB” under this column.
- Modified By: User will be able to view the “Modified By” name under this column.
- Modified On: User will be able to view the “Modified On” Date under this column.
- Action: The Action menu will provide following functionalities:

- Edit: Selecting “Edit” Icon as shown below in Figure , will allow user to Edit/Update the information: Insurance, Provider(Doctor Office), DOS, CPT Code, Balance Amount, & Remarks as shown below in Figure:.. Fields marked with (*) are mandatory.



Figure .: Edit Icon – Action.

Patient Name: test may june Patient ID: 2299934
 Insurance: Access DOS: 05/25/2023
 Balance Amount: 2 Remarks:

Redaction in Federal Spending

Insurance*	Access	Provider (Doctor Office)*	Aboshady in Patient Services
DOS	05/25/2023	Balance Amount*	2
Remarks	Enter Remarks		
Offset	<input type="checkbox"/>		
Copy of Cancel Check	<input type="checkbox"/> Choose File no file selected		
EOB Available	<input type="checkbox"/>		
EOB	<input type="checkbox"/> Choose File no file selected		
File Name		Action	<input type="button" value="Action"/>

Figure .: Edit/Update Payment Posting Workflow – Action

After Editing/Updating the Edit/Update Payment posting workflow, User needs to click on “Update” to confirm the changes & if User clicks on “Cancel” option for any changes made will be discarded.

Selecting the “Excel” option will allow the user to download Excel sheet of the Payment posting Work flow details as shown below in Figure: .

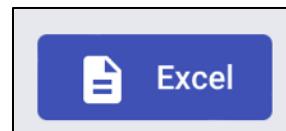


Figure no: Excel Sheet - Icon

ID	Patient Account Number	Patient Name	Status	Code	Source	Provider ID	Balance	Amc	DOS	CPT	AR Database	Team	Doctor	Insurance	Created By	Created On	Modified By	Modified On
1220875	93671236757	sdvk@idvbhuiladhniip	ADJ	Aging Report	260	2	06/06/2023				1 Apay Patel MD, A Professional Medical Corp	HMO	Abary, Alexa AAP2	Bhupender S	2023/06/08	null null	1970/01/01	
1220871	894956833	sd	APL	Aging Report	260	233	12/11/2023				2 Greater LB Ortho Surgical & Medical Group A Ptshp	HMO	Abary, Alexa AAP2	Bhupender S	2023/06/02	Bhupender Singh	2023/06/05	
1220872	9191616	Dinesh kr	ADJ	Aging Report	260	2	06/06/2023				3 Abbari, Abdi AAP2	HMO	Abbari, Abdi 1st Med Insu	Bhupender S	2023/06/01	Bhupender Singh	2023/06/01	
1220858	919191	levert	ADJ	Aging Report	159		20/02/11/2023				4 Greater LB Ortho Surgical & Medical Group A Ptshp	MCL	Abbari, Abdi AAP2	null null	2023/12/16	null null	1970/01/01	
1220854	99121212	love	APL	Incoming Call	159	60	05/30/2023				5 Greater LB Ortho Surgical & Medical Group A Ptshp	HMO	Abbari, Abdi 1st Med Insu	Bhupender S	2023/05/30	Bhupender Singh	2023/05/30	
1220854	99121212	love	APL	Incoming Call	159	60	05/30/2023				6 Greater LB Ortho Surgical & Medical Group A Ptshp	HMO	Abbari, Abdi 1st Med Insu	Bhupender S	2023/05/30	Bhupender Singh	1970/01/01	
1220851	5846561	abc	APL	Aging Report	260	701	aaa				7 Greater LB Ortho Surgical & Medical Group A Ptshp	HMO	Abary, Alexa AAP2	Bhupender S	2023/05/20	Bhupender Singh	2023/05/20	
1220852	9026218	Tenter	APL	Dr. Report	345	90	05/30/2023				80 Greater LB Ortho Surgical & Medical Group A Ptshp	MCL	Aho, Don AAP2	Bhupender S	2023/05/10	Bhupender Singh	2023/05/10	
1220851	686778907890789	Fc Barcelona	ADJ	Dr. Report	260	10	11/11/2022				1 Apay Patel MD, A Professional Medical Corp	HMO	Abary, Alexa AAP2	null null	2022/12/15	Bhupender Singh	2023/05/29	
1220852	9026218	test 2222	APL	Dr. Report	159	1	05/05/2023				2 Greater LB Ortho Surgical & Medical Group A Ptshp	HMO	Abary, Alexa AAP2	null null	2022/12/15	Bhupender Singh	2023/05/29	
1220848	14625212	Test 2222	BCP	Email	2	700	05/16/2023				3 Advanced Dermatology Care Center	MCL	Abbari, Abdi AAP2	null null	2022/12/15	Bhupender Singh	2023/05/26	
1220842	2299932	test may june	BCP	Email	353	2	05/25/2023				4 ProHealth Partners A Medical Group Inc	MCL	Abbari, Abdi AAP2	null null	2022/12/15	Bhupender Singh	2023/05/26	
1220841	2299934	Test May	IPT	Email	2	2	05/25/2023				5 Advanced Dermatology Care Center	MCL	Aboshadhy in Access	Bhupender S	2023/05/25	Bhupender Singh	2023/05/25	
1220840	551100987	test May 3	BCP	Faxes	2	2	05/25/2023				6 American Pacific Medical Group Inc	MCR	ABC	AAP2	Bhupender S	2023/05/25	null null	1970/01/01
1220839	55443322	Test May	APL	Email	2	2	andbdu				7 Abary, Alexander MD	PPO	ABC	Access	null null	2022/12/4	null null	1970/01/01
1220838	111	111	ADJ	Aging Report	260	11	11/11/2023				8 Abary, Alexander MD	PPO	ABC	Access	Bhupender S	2023/05/24	Bhupender Singh	2023/05/29
1220837	111	tree	APL	Faxes	2	2	05/23/2023				9 Ajay Patel MD, A Professional Medical Corp	HMO	Abary, Alexa 1st Med Insu	Bhupender S	2023/05/24	null null	1970/01/01	
1220831	66314402	Test Patient 1	SP-STB	Email	207	4	05/23/2023				10 Advanced Dermatology Care Center	MCL	Abbari, Abdi AAP2	null null	2022/12/15	Bhupender Singh	2023/05/23	
1220824	5896321	GUNISH	ADJ	Aging Report	159	5698	03/14/2023				11 Dassani, Most 3 MD	MCL	Abbari, Abdi AAP2	null null	2022/12/15	Bhupender Singh	2023/05/23	
1220823	09032023	Test 20	APL	Aging Report	434	2	03/09/2023				12 Dassani, Most 3 MD	MCL	Abbari, Abdi AAP2	null null	2022/12/15	Bhupender Singh	2023/05/23	
1220823	09032023	Test 20	APL	Email	434	2	03/09/2023				13 Ajay Patel MD, A Professional Medical Corp	MCL	Access PCP J Acclaim	Bhupender S	2023/03/10	null null	1970/01/01	
1220821	98756421	Arindham Kumar	ADJ	Aging Report	2	6585	03/09/2023				14 Ajay Patel MD, A Professional Medical Corp	MCL	ABC	AAP2	Bhupender S	2022/12/12	Bhupender Singh	2023/04/26
1220821	98756421	Arindham Kumar	ADJ	Aging Report	2	6585	03/09/2023				15 Ajay Patel MD, A Professional Medical Corp	MCL	ABC	AAP2	Bhupender S	2023/03/09	null null	1970/01/01
1220817	240220230	Test 112	ADJ	Email	129	2	02/24/2023				16 Abary, Alexander MD	MCL	NAMFS (Wh- Access)	null null	2022/12/09	Bhupender Singh	2023/02/24	
1220811	2402202301	Test 112	ADJ	Email	129	32	02/24/2023				17 Abary, Alexander MD	MCL	NAMFS (Wh- Access)	Bhupender S	2023/02/04	null null	1970/01/01	
1220815	8441222	suham	ADJ	Aging Report	29	32	03/11/2023				18 Ajay Patel MD, A Professional Medical Corp	HMO	Ibarra, Rodo 1st Med Insu	Bhupender S	2023/03/10	null null	1970/01/01	
1220814	1230	reyat	ADJ	Aging Report	29	1	24/11/2022				19 Advanced Dermatology Care Center	HMO	Ibarra, Rodo 1st Med Insu	Bhupender S	2023/11/24	null null	1970/01/01	

Figure no: Downloaded Excel Sheet

- **Payment Posting Log:** User will be able to view the following information as shown below in Figure:

- Pending, Rejected, Approved & Completed.

Payment Posting Log	
Pending	34
Rejected	0
Approved	0
Completed	470

Figure no: Payment Posting Log

On click of the above-mentioned links under “Payment Posting Log”, As shown above in Figure: (Ref. Payment Posting Offset Log) User will be redirected to that detailed page where selected “Status” of Payment posting workflow will be displayed.

Also, “Status” filter can be accessed through the “Payment posting workflow” screen.

- **Accounts Receivable (AR) Team Productivity & Process Workflow:** User will be able to view the following information as shown below in Figure:

- List AR Productivity, Adjustment Log, Coding Correction Log, Payment Posting Log, Refund Request [List All], Query to TL, Open, Back To team & Closed.

Accounts Receivable (AR) Team Productivity & Process Workflow	
List AR Productivity	50073
Adjustment Log	11173
Coding Correction Log	10462
Payment Posting Log	33745
Refund Request [List All]	54
Query to TL	59
Open	25
Back To Team	10
Closed	5

Figure no: Accounts Receivable (AR) Team Productivity & Process Workflow

1. List AR Productivity

Add AR Productivity

After selecting “Add New” from the “AR Productivity List” menu, User will be redirected to the “Add AR Productivity” Page as shown below on Figure: . Where user will be able to Add the AR Productivity List.

Add AR Productivity					
Patient Account No*	Enter Patient Account No	Patient Name*	Enter Patient Name	DOS	MM/DD/YYYY
No of CPT/Claim	Enter No of CPT/Claim	AR Database*	Select AR Database	Provider	Select Provider
AR Status Code*	Select Status Code	AR Source*	Select Source	Team	Select Team
Insurance*	Select Insurance	Balance Amount*	Enter Balance Amount	<input type="checkbox"/> Adjustment Log <input type="checkbox"/> Coding Correction <input type="checkbox"/> Payment Posting Log <input type="checkbox"/> Re-Key Request To Charge Posting <input type="checkbox"/> Query To TL	
Remark	Enter Remark				
<input type="button" value="Cancel"/> <input type="button" value="Submit"/>					

Figure .: Add AR Productivity– Action

User will be able to select the head from Checkbox options available as shown above in Figure: where they want to Add AR Productivity.

After filling all the necessary details in “Add AR Productivity”, User needs to click on “Submit” to confirm the changes & if User clicks on “Cancel” option for any changes made will be discarded.

After selecting “List AR Productivity” Link from the “Accounts Receivable (AR) Team Productivity & Process Workflow” menu from Dashboard, User will be redirected to the “AR Productivity List” Page as shown below on Figure: . Where user will be able to view the AR Productivity List.

Action	Patient Acc No	Patient Name	DOS	CPT	Source	Status Code	AR Database	Insurance	Team	Doctor
4631642	abc		01/12/2022 - 06/06/2022	5	Aging Report	WO	Ajay Patel MD, A Professional Medical Corp	N/A		Abary, Alexanc
53671236757	sdvkjlsdvbhuasdhpv		06/06/2022	1	Aging Report	ADJ	Ajay Patel MD, A Professional Medical Corp	AARP2		Abary, Alexanc
894956833	ssd		12/11/2023	2	Aging Report	API	Greater LB Ortho Surgical & Medical Group A Ptsrhs	1st Med Insurance Plan		Abary, Alexanc
8949568	wrwer			23	Aging Report	API	Greater LB Ortho Surgical & Medical Group A Ptsrhs	1st Med Insurance Plan		Abbas, Abdul

Figure no: AR Productivity List

AR Productivity will have the following Search filters:

- Keyword: User will be able to search the patient by entering “Keyword”.

- AR Database: User will be able to Select the AR Database in “AR Database” drop-down option.
- Doctor: User will be able to Select the Doctor in “Doctor” drop-down option.
- Insurance: User will be able to Select the Insurance in “Insurance” drop-down option.
- Status: User will be able to Select the Status Code from “Status Code” drop-down option.
- Source: User will be able to Select the Source from “Source” drop-down option.
- Sub-Status: User will be able to Select the Sub-Status from “Sub-Status” drop-down option.
- HD/Non-HD: User will be able to Select the True/False from “HD/Non-HD” drop-down option.
- Team: User will be able to Select the Team in “Team” drop-down option.
- Created Date From: User will be able to select the date from “Created-Date From” option.
- Created Date To: User will be able to select the date from “Created-Date To” option.
- Workflow: User will be able to select the Workflow from “Workflow” drop-down option.

User can select desired Search options as required. It is not Mandatory to fill all the Options provided.

After selecting the options, User will click on the “Search” button to search that task as per the Inputs provided. If the User clicks on the “Cancel” button, the selected Filters will be removed instantly.

Searched/List AR Productivity will be displayed under the following Columns:

- Patient Acc. No.: User will be able to view the “Patient Acc. No.” under this column.
- Patient Name: User will be able to view the “Patient Name” under this column.
- DOS: User will be able to view the “DOS” date under this column.
- CPT: User will be able to view the “CPT” under this column.
- Source: User will be able to view the “Source” Name under this column
- Status Code: User will be able to view the “Status Code” under this column.
- AR Database: User will be able to view the “AR Database” name under this column.
- Insurance: User will be able to view the “Insurance” under this column.
- Team Name: User will be able to view the “Team Name” under this column.
- Doctor: User will be able to view the “Doctor” name under this column.
- Balance: User will be able to view the “Balance” name under this column.
- HD/Non-HD: User will be able to view the “HD/Non-HD” under this column.
- Created By: User will be able to view the “Created By” name under this column.
- Created On: User will be able to view the “Created On” Date under this column.
- Action: The Action menu will provide following functionalities:
 - Edit: Selecting “Edit” Icon as shown below in Figure , will allow user to Edit/Update the information: Patient Acc. No., Patient Name, DOS, No.

of CPT, AR Database, Provider, AR Status code, AR Source, Team, Insurance, Balance Amt. & Remarks as shown below in Figure:. . Fields marked with (*) are mandatory.



Figure .: Edit Icon – Action.

Update AR Productivity

Patient Account No*	4631642	Patient Name*	abc	DOS	01/12/2022 - 06/06/2022
No of CPT/Claim*	5	AR Database*	Ajay Patel MD, A Professional...	Provider	Abary, Alexander
AR Status Code*	WO	AR Source*	Aging Report	Team	Select Team
Insurance*	N/A	Balance Amount*	159556	<input type="checkbox"/> Adjustment Log <input type="checkbox"/> Coding Correction <input type="checkbox"/> Payment Posting Log <input type="checkbox"/> Re-Key Request To Charge Posting <input type="checkbox"/> Query To TL	
Remark	Selfpay Testing				

Figure .: Edit/Update AR Productivity– Action

User will be able to select the head from Checkbox options available as shown above in Figure:. where they want to Update AR Productivity.

After Editing/Updating the Edit/Update AR Productivity, User needs to click on “Update” to confirm the changes & if User clicks on “Cancel” option for any changes made will be discarded.

Selecting the “Excel” option will allow the user to download Excel sheet of the AR Productivity details as shown below in Figure: .

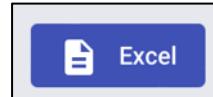


Figure no: Excel Sheet - Icon

ID	Patient Acco	Patient Nam	Status Code	Source	Provider ID	Balance Amc	DOS	CPT	AR Database Team	Doctor	Insurance	Created By	Created On	Modified By	Modified On
1220876	4631642	abc	IWO	Aging Report	260	159556	01/12/2022	5	Ajay Patel Iv Self Pay and CEP	Abary, Alexander	N/A	Bhupender S	2023/06/10	Bhupender Singh	2023/06/09
1220875	5367123675	sdv@jlsdvbhru	ADJ	Aging Report	260	2	06/06/2023	1	Ajay Patel Iv HMO	Abary, Alexander	AARP2	Bhupender S	2023/06/08	null null	1970/01/01
1220871	894956833	ssd	APL	Aging Report	260	233	12/11/2023	2	Greater LB Iv HMO	Abary, Alexander	1st Med Insu	Bhupender S	2023/06/02	Bhupender Singh	2023/06/06
1220870	8949568	wrwer	APL	Aging Report	159	123		23	Greater LB Iv HMO	Abbasi, Abdul	1st Med Insu	Bhupender S	2023/06/02	null null	1970/01/01
1220869	89495684	rishi	ADJ	Aging Report	159	63		3	Ajay Patel Iv MCL	Abbasi, Abdul	1st Med Insu	Bhupender S	2023/06/01	Bhupender Singh	2023/06/01
1220868	111546165	Dinesh kr	APL	Dr. Report	260	30		3	Ajay Patel Iv MD, A Professional	Abary, Alexander	1st Med Insu	Bhupender S	2023/05/31	Bhupender Singh	2023/06/02
1220867	11154615	Dinesh kr	APL	Dr. Report	260	30	05/31/2023	3	Ajay Patel Iv MD, A Professional	Abary, Alexander	1st Med Insu	Bhupender S	2023/05/31	null null	1970/01/01
1220865	1115465	Dinesh kr	APL	Dr. Report	260	30	05/31/2023	3	Ajay Patel Iv MD, A Professional	Abary, Alexander	1st Med Insu	Bhupender S	2023/05/31	null null	1970/01/01
1220864	345	ret	ADJ	Dr. Report	260	345	23/12/2020	23	Greater LB Iv MCL	Abary, Alexander	1st Med Insu	Bhupender S	2023/05/31	null null	1970/01/01
1220863	234	wer	ADJ	Dr. Report	159	234	12/12/2023	23	Ajay Patel Iv MCL	Abbasi, Abdul	1st Med Insu	Bhupender S	2023/05/31	null null	1970/01/01
1220860	12	sdfdf	APL	Dr. Report	159	20	12/12/2023	23	Greater LB Iv MCL	Abbasi, Abdul	Access	Bhupender S	2023/05/31	null null	1970/01/01
1220859	092394	ari test	APL	Dr. Report	159	30	02/12/2023	23	Greater LB Iv MCL	Abbasi, Abdul	AARP2	Bhupender S	2023/05/31	null null	1970/01/01
1220858	919191	lodser	ADJ	Aging Report	159	20	02/11/2023	2	Greater LB Iv MCL	Abbasi, Abdul	AARP2	Bhupender S	2023/05/31	null null	1970/01/01
1220854	99121212	love	APL	Incoming Call	159	60	05/30/2023	4	Greater LB Iv HMO	Abbasi, Abdul	1st Med Insu	Bhupender S	2023/05/30	Bhupender Singh	2023/05/30
1220853	5846561	abc	APL	Aging Report	260	701	aaa	7	Greater LB Iv HMO	Abary, Alexander	AARP2	Bhupender S	2023/05/30	Bhupender Singh	2023/05/30
1220852	9026218	Tester	APL	Dr. Report	345	90	05/30/2023	80	Greater LB Iv MCL	Ahn, Don	AARP2	Bhupender S	2023/05/30	Bhupender Singh	2023/05/30
1220851	6867789078	Fc Barcelona	ADJ	Dr. Report	260	10	11/11/2021	1	Ajay Patel Iv HMO	Abary, Alexander	AARP2	Bhupender S	2023/05/29	Bhupender Singh	2023/05/30
1220850	22332323434	test 2222	APL	Dr. Report	159	1	05/29/2023	1	Greater LB Iv MCL	Abbasi, Abdul	Access	Bhupender S	2023/05/29	Bhupender Singh	2023/05/30
1220848	4235456	654	ADJ	Aging Report	159	5	@66371/bnd	22	Greater LB Iv MCL	Abbasi, Abdul	1st Med Insu	Bhupender S	2023/05/29	Bhupender Singh	2023/05/29

Figure no: Downloaded Excel Sheet

2. AR Productivity List (Adjustment Log)

After selecting “Adjustment Log” Link from the “Accounts Receivable (AR) Team Productivity & Process Workflow” menu from Dashboard, User will be redirected to the “AR Productivity List (Adjustment Log)” Page as shown below on Figure: . Where user will be able to view the AR Productivity List.

Action	Patient Acc No	Patient Name	DOS	CPT	Source	Status Code	AR Database	Insurance	Team	Doctor
	5367123675	sdv@jlsdvbhru	06/06/2023	1	Aging Report	ADJ	Ajay Patel Iv Self Pay and CEP	AARP2	HMO	Abary, Alexander
	894956833	ssd	12/11/2023	2	Aging Report	APL	Greater LB Ortho Surgical & Medical Group A Ptnshp	1st Med Insurance Plan	HMO	Abary, Alexander
	111546165	Dinesh kr		3	Dr. Report	APL	Ajay Patel Iv MD, A Professional Medical Corp	1st Med Insurance Plan	Abary, Alexander	
	99121212	love	05/30/2023	4	Incoming Call	APL	Greater LB Ortho Surgical & Medical Group A Ptnshp	1st Med Insurance Plan	HMO	Abbasi, Abdul

Figure no: AR Productivity List (Adjustment Log)

AR Productivity (Adjustment Log), Searched/List AR Productivity (Adjustment Log) & Add New AR Productivity Log has same functionalities as mentioned above in “**List AR Productivity**”.

3. AR Productivity List (Coding Correction)

After selecting “Coding Correction” Link from the “Accounts Receivable (AR) Team Productivity & Process Workflow” menu from Dashboard, User will be redirected to the “AR Productivity List (Coding Correction)” Page as shown below on Figure: . Where user will be able to view the AR Productivity List (Coding Correction).

Action	Patient Acc No	Patient Name	DOS	CPT	Source	Status Code	AR Database	Insurance	Team	Doctor
	894956833	ssd	12/11/2023	2	Aging Report	APL	Greater LB Ortho Surgical & Medical Group A Prrshp	1st Med Insurance Plan	HMO	Abary, Alexander
	99121212	love	05/30/2023	4	Incoming Call	APL	Greater LB Ortho Surgical & Medical Group A Prrshp	1st Med Insurance Plan	HMO	Abbas, Abdul
	34625252	Test 123	05/26/2023	2	Email	BCP	Prohealth Partners A Medical Group Inc	AARP2	MCR	ABC
	2299934	test may june	05/25/2023	3	Email	BCP	Advanced Dermatology Center	Access	MCL	Abshady in Patient

Figure no: AR Productivity List (Coding Correction)

AR Productivity (Coding Correction), Searched/List AR Productivity (Coding Correction) & Add New AR Productivity Log has same functionalities as mentioned above in “List AR Productivity”.

4. AR Productivity List (Payment Posting Log)

After selecting “Payment Posting Log” Link from the “Accounts Receivable (AR) Team Productivity & Process Workflow” menu from Dashboard, User will be redirected to the “AR Productivity List (Payment Posting Log)” Page as shown below on Figure: . Where user will be able to view the AR Productivity List (Payment Posting Log).

Action	Patient Acc No	Patient Name	DOS	CPT	Source	Status Code	AR Database	Insurance	Team	Doctor
<input checked="" type="checkbox"/>	894956833	ssd	12/11/2023	2	Aging Report	APL	Greater LB Ortho Surgical & Medical Group A Ptsrshp	1st Med Insurance Plan	HMO	Abar, Alexander
<input checked="" type="checkbox"/>	686778907890789	Fc Barcelona	11/11/2022	1	Dr. Report	ADJ	Ajay Patel MD, A Professional Medical Corp	AARP2	HMO	Abar, Alexander
<input checked="" type="checkbox"/>	34625252	Test 123	05/26/2023	2	Email	BCP	Prohealth Partners A Medical Group Inc	AARP2	MCR	ABC
<input checked="" type="checkbox"/>	2299934	test may june	05/25/2023	3	Email	BCP	Advanced Dermatology Care Center	Access	MCL	Aboshady in Patient Services

Figure no: AR Productivity List (Payment Posting Log)

AR Productivity (Payment Posting Log), Searched/List AR Productivity (Payment Posting Log) & Add New AR Productivity Log has same functionalities as mentioned above in “List AR Productivity”.

5. AR Productivity List (Query To TL)

After selecting “Query to TL” Link from the “Accounts Receivable (AR) Team Productivity & Process Workflow” menu from Dashboard, User will be redirected to the “AR Productivity List (Query to TL)” Page as shown below on Figure: . Where user will be able to view the AR Productivity List (Query to TL).

Action	Patient Acc No	Patient Name	DOS	CPT	Source	Status Code	AR Database	Insurance	Team	Doctor
<input checked="" type="checkbox"/>	894956833	ssd	12/11/2023	2	Aging Report	APL	Greater LB Ortho Surgical & Medical Group A Ptsrshp	1st Med Insurance Plan	HMO	Abar, Alexander
<input checked="" type="checkbox"/>	686778907890789	Fc Barcelona	11/11/2022	1	Dr. Report	ADJ	Ajay Patel MD, A Professional Medical Corp	AARP2	HMO	Abar, Alexander
<input checked="" type="checkbox"/>	34625252	Test 123	05/26/2023	2	Email	BCP	Prohealth Partners A Medical Group Inc	AARP2	MCR	ABC
<input checked="" type="checkbox"/>	2299934	test may june	05/25/2023	3	Email	BCP	Advanced Dermatology Care Center	Access	MCL	Aboshady in Patient Services

Figure no: AR Productivity List (Query to TL)

AR Productivity (Query to TL), Searched/List AR Productivity (Query to TL) & Add New AR Productivity Log has same functionalities as mentioned above in “**List AR Productivity**”.

➤ **Query To TL:** User will be able to view the following information as shown below in Figure:

- Query to TL, Open, Back To team & Closed.

Query to TL	
Query to TL	59
Open	25
Back To Team	10
Closed	5

Figure no: Query To TL

1. Query To TL

After selecting any Link from “Query To TL” Link from Dashboard, User will be redirected to the “Query To TL” Page as shown below on Figure: . Where user will be able to view the Query to TL List.

The screenshot shows the 'Query To TL' search interface. The left sidebar lists various modules: Dashboard, Charge Batching System, Demo/CIE/Coding Prod., Payment Batching System, Payment Productivity, Cashlog Report, Process Manual, Doctor, Group, Insurance, Company, AR Database, Location, Payment Type, Revenue Type, and QA Manager. The main area has a header 'Welcome Bhupender'. The search form includes fields for Keyword, Provider (Doctor Office), Team, Insurance, Status Code, Source, Sub Status, Created Date From, To, and Created By. Below the form is a table with the following data:

Action	Patient Acc No	Patient Name	Source	AR Database	DOS	CPT	Doctor	Insurance	Team	Status Code
	894956833	ssd	Aging Report	Greater LB Ortho Surgical & Medical Group A Ptsrsh	12/11/2023	2	Abary, Alexander	1st Med Insurance Plan		APL
	686778907890789	Fc Barcelona	Dr. Report	Ajay Patel MD, A Professional Medical Corp	11/11/2022	1	Abary, Alexander	AARP2		ADJ
	34625252	Test 123	Email	Prohealth Partners A Medical Group Inc	05/26/2023	2	ABC	AARP2		BCP
	2299934	test may june	Email	Advanced Dermatology	05/25/2023	3	Aboshady in Patient	Access		BCP

Figure no: Query To TL

Query To TL will have the following Search filters:

- Keyword: User will be able to search the patient by entering “Keyword”.
- Provider (Doctor Office): User will be able to Select the provider in “Provider (Doctor Office)” drop-down option.
- Team: User will be able to Select the Team in “Team” drop-down option.
- Insurance: User will be able to Select the Insurance in “Insurance” drop-down option.
- Status code: User will be able to Select the Status Code from “Status Code” drop-down option.
- Source: User will be able to Select the Source from “Source” drop-down option.
- Sub-Status: User will be able to Select the Sub-Status from “Sub-Status” drop-down option.

- Created Date From: User will be able to select the date from “Created-Date From” option.
- Created Date To: User will be able to select the date from “Created-Date To” option.
- Created By: User will be able to select the Name from the “Created By” option.

User can select desired Search options as required. It is not Mandatory to fill all the Options provided.

After selecting the options, User will click on the “Search” button to search that task as per the Inputs provided. If the User clicks on the “Cancel” button, the selected Filters will be removed instantly.

Searched/List Query To TL will be displayed under the following Columns:

- Patient Acc. No.: User will be able to view the “Patient Acc. No.” under this column.
- Patient Name: User will be able to view the “Patient Name” under this column.
- DOS: User will be able to view the “DOS” date under this column.
- CPT: User will be able to view the “CPT” under this column.
- Source: User will be able to view the “Source” Name under this column
- Status Code: User will be able to view the “Status Code” under this column.
- AR Database: User will be able to view the “AR Database” name under this column.
- Insurance: User will be able to view the “Insurance” under this column.
- Team Name: User will be able to view the “Team Name” under this column.

- Doctor: User will be able to view the “Doctor” name under this column.
- Balance: User will be able to view the “Balance” name under this column.
- Created By: User will be able to view the “Created By” name under this column.
- Created On: User will be able to view the “Created On” Date under this column.
- Action: The Action menu will provide following functionalities:
 - Edit: Selecting “Edit” Icon as shown below in Figure , will allow user to Edit/Update the information: Remark, TL Note & Status as shown below in Figure:.. Fields marked with (*) are mandatory.

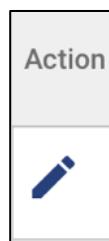


Figure .: Edit Icon – Action.

Query To TL

Patient Account No:	894956833	DOS :	12/11/2023
Patient Name:	ssd	CPT :	2
Insurance:	1st Med Insurance Plan	Provider (Doctor Office):	Arary, Alexander
Notes:	test	Balance Amount (in USD):	233

Remark: 12

TL Notes: Enter TL Notes

Status: (dropdown menu)

Cancel Update

Figure .: Edit/Update Query To TL– Action

After Editing/Updating the Edit/Update AR Productivity, User needs to click on “Update” to confirm the changes & if User clicks on “Cancel” option for any changes made will be discarded.

Selecting the “Excel” option will allow the user to download Excel sheet of the Query To TL details as shown below in Figure: .

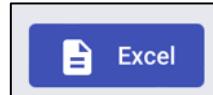


Figure no: Downloaded Excel Sheet

Patient Acc#	Patient Name	Status Code	Source	Provider ID	Balance Amt/DOIS	CPT	AR Database Team	Doctor	Insurance	Created By	Created On	Modified By	Modified On		
3220876_4631642	abc	WO	Aging Report	260	159556	01/12/2022	5 Ajay Patel N	Self Pay and CEP	Abare, Alexander	N/A		Bhupender S	2023/06/10	Bhupender Singh	2023/06/09
3220875_5367312675	sdkjlkdhdu	ADI	Aging Report	260	2	06/06/2023	1 Ajay Patel N	HMO	Abare, Alexander	AAP#2		Bhupender S	2023/06/08	null	1970/01/01
3220870_5367312633	sd	ADI	Aging Report	260	231	12/12/2023	2 Greater LB I	HMO	Abare, Alexander	1st Med Insu	Bhupender S	2023/06/08	Bhupender Singh	2023/06/08	
3220870_8949568	ewer	ADI	Aging Report	159	123		23 Greater LB I	HMO	Abare, Abdul	1st Med Insu	Bhupender S	2023/06/02	null	1970/01/01	
3220869_8949568	ruthi	ADI	Aging Report	159	63		3 Ajay Patel N	MCL	Abbari, Abdul	1st Med Insu	Bhupender S	2023/06/01	Bhupender Singh	2023/06/01	
3220868_111546165	Dinesh M	API	Dr. Report	260	30		4 Ajay Patel M	A Professional	Abare, Alexander	1st Med Insu	Bhupender S	2023/05/31	Bhupender Singh	2023/06/01	
3220867_111546165	Dinesh M	API	Dr. Report	260	30	05/31/2023	5 Ajay Patel M	A Professional	Abare, Alexander	1st Med Insu	Bhupender S	2023/05/31	Bhupender Singh	2023/06/01	
3220865_111546165	Dinesh M	API	Dr. Report	260	30	05/31/2023	6 Ajay Patel M	A Professional	Abare, Alexander	1st Med Insu	Bhupender S	2023/05/31	Bhupender Singh	2023/06/01	
3220863_345	ret	ADI	Dr. Report	260	23	12/12/2020	345 Greater LB I	MCL	Abare, Alexander	1st Med Insu	Bhupender S	2023/05/31	null	1970/01/01	
3220863_238	war	ADI	Dr. Report	159	234	12/12/2023	244 Ajay Patel N	MCL	Abbari, Abdul	1st Med Insu	Bhupender S	2023/05/31	null	1970/01/01	
3220863_12	test	ADI	Dr. Report	159	20	01/12/2023	25 Ajay Patel N	MCL	Abbari, Abdul	1st Med Insu	Bhupender S	2023/05/31	null	1970/01/01	
3220859_092394	art test	ADI	Dr. Report	159	30	01/12/2023	23 Greater LB I	MCL	Abbari, Abdul	AAP#2		Bhupender S	2023/05/31	null	1970/01/01
3220858_915191	losdert	ADI	Aging Report	159	20	02/11/2023	2 Greater LB I	MCL	Abbari, Abdul	AAP#2		Bhupender S	2023/05/31	null	1970/01/01
3220858_915191	losdert	API	Reserve Call	159	60	06/06/2023	4 Ajay Patel N	A Professional	Abare, Alexander	1st Med Insu	Bhupender S	2023/05/30	Bhupender Singh	2023/05/30	
3220853_5846561	abc	API	Aging Report	260	703	axx	7 Greater LB I	HMO	Abare, Alexander	AAP#2		Bhupender S	2023/05/30	Bhupender Singh	2023/05/30
3220852_9026218	Test	API	Dr. Report	345	90	05/30/2023	80 Greater LB I	MCL	Ahn, Don	AAP#2		Bhupender S	2023/05/30	Bhupender Singh	2023/05/30
3220851_6867789078	Fc Barcelona	ADI	Dr. Report	260	10	11/12/2022	1 Ajay Patel N	HMO	Abare, Alexander	AAP#2		Bhupender S	2023/05/29	Bhupender Singh	2023/05/30
3220848_4235454	test 2222	API	Dr. Report	159	1	05/30/2023	1 Greater LB I	MCL	Abbari, Abdul	1st Med Insu	Bhupender S	2023/05/29	Bhupender Singh	2023/05/29	
3220848_4235456	54	ADI	Aging Report	159	5	@06/771nd	22 Greater LB I	MCL	Abbari, Abdul	1st Med Insu	Bhupender S	2023/05/29	Bhupender Singh	2023/05/29	

Figure no: Downloaded Excel Sheet

➤ **Demo CE & Coding Validation Team Prod. & Process Workflow:** User will be able to view the following information as shown below in Figure:

- List Productivity, On Hold, Rejected Logs, New Rejections, 1st Request Due, No. Of First Request, 2nd Request Due, No. Of Second Request, Resolved Rejections, Resolved Rejections with Dummy CPT & Completed Rejections.

Demo, CE & Coding Validation Team Prod. & Process Workflow	
List Productivity	10636
onHold	7
Rejected Logs	21
New Rejections	0
1st Request Due	0
Number Of First Requests	0
2nd Request Due	0
Number Of Second Requests	0
Resolved Rejections	0
Resolved Rejections with dummy CPT	0
Completed Rejections	0

Figure no:**1. List Productivity**

After selecting “List Productivity” Link from the “Demo CE & Coding Validation Team Prod. & Process Workflow” menu from Dashboard, User will be redirected to the “Charge Batch Productivity” Page as shown below on Figure: . Where user will be able to view the Charge Batch Productivity List.

The screenshot shows the 'Charge Batch Productivity' page. At the top, there are search and filter fields: 'Ticket No.', 'Provider', 'Posted Date From', 'Scan Date (From)', 'Posted By', 'Work Flow', and 'On Hold'. Below these are buttons for 'Add New Coding', 'Add New Demo', 'Add New CE', and 'Excel'. A search bar and a cancel button are also present. The main area displays a table of productivity data with columns: Action, Batch/Ticket#, Prod. Type, Doctor Name, Scan Date, CT Posted Date, Time, Work Flow, Other Info, and Created Date. The table contains six rows of data, each with a edit icon. The data includes patient counts, dates, and specific doctor names like Maurice, Alexander, and Elite Cardio - Dehghani, Hossein.

Action	Batch/Ticket#	Prod. Type	Doctor Name	Scan Date	CT Posted Date	Time	Work Flow	Other Info	Created Date
	1289381	Demo	Access PCP/Inc	06/11/2023		166.7		New Patient: 0, Existing Patient: 20	06/12/2023
	1289370	Demo	Bell,Maurice	06/12/2023		33.34	Payment Reversal	New Patient: 0, Existing Patient: 4	06/12/2023
	1289380	CE	ABC	06/10/2023	06/10/2023		Reject	FFS: 4, CAP: 4	06/10/2023
	1289379	CE	Arary,Alexander	06/08/2023	06/08/2023			FFS: 3, CAP: 2	06/08/2023
	1289378	CE	Elite Cardio - Dehghani, Hossein	06/08/2023	06/08/2023			FFS: 3, CAP: 4	06/08/2023
	1289376	Coding	Arary,Alexander	06/07/2023			Reject	Number of A/C: 2, ICDs: 1, CPTs: 2	06/08/2023

Figure no:**Add New Coding**

After selecting “Add New Coding” from the “Charge Batch Productivity” menu, User will be redirected to the “Add Coding Productivity” Page as shown below on Figure: . Where user will be able to Add the New Coding Productivity.

The screenshot shows the 'Add Coding Productivity' page. It has fields for 'Ticket Number' (with a 'Get Detail' button), 'Provider Name', 'Date of Service From', 'Batch Type', and 'Date of Service To'. Below these are sections for 'Productivity Type' (set to 'Coding'), 'Number of Accounts', 'Number of Reports', 'Number of ICDs', 'Number of CPTs', 'Time (minute)', 'Scan Date', 'On Hold', and 'Remarks'. At the bottom are 'Cancel' and 'Add' buttons.

Figure .: Add Coding Productivity – Action

After filling all the necessary details in “Add Coding Productivity”, User needs to click on “Add” to confirm the changes & if User clicks on “Cancel” option for any changes made will be discarded.

Add Demo Productivity

After selecting “Add New Demo” from the “Charge Batch Productivity” menu, User will be redirected to the “Add Demo Productivity” Page as shown below on Figure: . Where user will be able to Add the New Demo Productivity.

Figure .: Add Demo Productivity – Action

After filling all the necessary details in “Add Demo Productivity”, User needs to click on “Add” to confirm the changes & if User clicks on “Cancel” option for any changes made will be discarded.

Add CE Productivity

After selecting “Add New CE” from the “Charge Batch Productivity” menu, User will be redirected to the “Add CE Productivity” Page as shown below on Figure: . Where user will be able to Add the New CE Productivity.

Figure .: Add Coding Productivity – Action

After filling all the necessary details in “Add CE Productivity”, User needs to click on “Add” to confirm the changes & if User clicks on “Cancel” option for any changes made will be discarded.

Charge Batch Productivity will have the following Search filters:

- Ticket No.: User will be able to search by entering “Ticket No”.
- Provider: User will be able to Select the Provider in “Provider” drop-down option.
- Posted Date From: User will be able to select the date range from “Posted-Date From” option.
- Scan Date (From): User will be able to select the date range from “Scan Date (From)” option.
- Posted By: User will be able to search by selecting name from in “Posted By” drop-down option.
- Workflow: User will be able to select the Workflow from “Workflow” drop-down option.
- On-Hold: User will be able to select “On-Hold” Check box.

User can select desired Search options as required. It is not Mandatory to fill all the Options provided.

After selecting the options, User will click on the “Search” button to search that task as per the Inputs provided. If the User clicks on the “Cancel” button, the selected Filters will be removed instantly.

Searched/List Charge Batch Productivity will be displayed under the following Columns:

- Batch/Ticket: User will be able to view the “Batch/Ticket” number under this column.
- Product Type: User will be able to view the “Product Type” name under this column.
- Doctor Name: User will be able to view the “Doctor Name” under this column.
- Scan Date: User will be able to view the “Scan Date” under this column.
- CT Post Date: User will be able to view the “CT Post Date” under this column.
- Time: User will be able to view the “Time” under this column
- Workflow: User will be able to view the “Workflow” under this column.
- Other Info: User will be able to view the “Other Info” under this column
- Created By: User will be able to view the “Created By” name under this column.
- Modified On: User will be able to view the “Modified On” Date under this column.
- Action: The Action menu will provide following functionalities:
 - Edit: Selecting “Edit” Icon as shown below in Figure , will allow user to Edit/Update the information: New Client Count, Existing Patient Count, Number of reviews, time, Scan Date, On-Hold(Checkbox), Remarks & Workflow as shown below in Figure:. . Fields marked with (*) are mandatory.



Figure .: Edit Icon – Action.

Figure .: Edit/Update Demo Productivity– Action

After Editing/Updating the Edit/Update Demo Productivity, User needs to click on “Update” to confirm the changes & if User clicks on “Cancel” option for any changes made will be discarded.

Selecting the “Excel” option will allow the user to download Excel sheet of the Charge Batch Productivity details as shown below in Figure: .

/Excel sheet download is still Blank & Print option not working.

Figure no:

2. On Hold

After selecting “On Hold” Link from the “Demo CE & Coding Validation Team Prod. & Process Workflow” menu from Dashboard, User will be redirected to the “Coding Productivity” Page as shown below on Figure: . Where user will be able to view the Charge Batch Productivity List.

Action	Batch/Ticket#	Prod. Type	Doctor Name	Scan Date	CT Posted Date	Time	Work Flow	Number Of Acc.	ICDs
<input type="checkbox"/>	1289376	Coding	Abari, Alexander	06/07/2023			Reject	2	1
<input type="checkbox"/>	1289369	Coding	ABC	05/24/2023	05/18/2023	30	Reject	1	1
<input type="checkbox"/>	1289371	Coding	Abari, Alexander	05/23/2023	05/24/2023	12	Reject	1	1
<input type="checkbox"/>	1289364	Coding	Abbas, Abdul	04/12/2023		11	Argus TL	2	2
<input type="checkbox"/>	1289363	Coding	Ahr, Duke	05/02/2023		30	Reject	1	1
<input type="checkbox"/>	1289362	Coding	ABC	05/02/2023		30	Internal	1	2
<input type="checkbox"/>	1289360	Coding	ABC	05/02/2023		1	Internal	1	2

Figure no:

Coding Productivity will have the following Search filters:

- Ticket No.: User will be able to search by entering “Ticket No”.
- Provider: User will be able to Select the Provider in “Provider” drop-down option.
- Posted Date From: User will be able to select the date range from “Posted-Date From” option.
- Scan Date (From): User will be able to select the date range from “Scan Date (From)” option.
- Posted By: User will be able to search by selecting name from in “Posted By” drop-down option.
- Workflow: User will be able to select the Workflow from “Workflow” drop-down option.
- On-Hold: User will be able to select “On-Hold” Check box.

User can select desired Search options as required. It is not Mandatory to fill all the Options provided.

After selecting the options, User will click on the “Search” button to search that task as per the Inputs provided. If the User clicks on the “Cancel” button, the selected Filters will be removed instantly.

Searched/List Coding Productivity will be displayed under the following Columns:

- Batch/Ticket: User will be able to view the “Batch/Ticket” number under this column.
- Product Type: User will be able to view the “Product Type” name under this column.
- Doctor Name: User will be able to view the “Doctor Name” under this column.
- Scan Date: User will be able to view the “Scan Date” under this column.
- CT Post Date: User will be able to view the “CT Post Date” under this column.
- Time: User will be able to view the “Time” under this column
- Workflow: User will be able to view the “Workflow” under this column.
- No. of Account: User will be able to view the “No. of Account” under this column.
- ICDs: User will be able to view the number of “ICDs” under this column
- CPTs: User will be able to view the number of “CPTs” under this column
- Number of Reports: User will be able to view the “Number of Reports” under this column
- Created Date: User will be able to view the “Created Date” under this column.

- Created By: User will be able to view the “Created By” name under this column.
- Modified By: User will be able to view the “Modified By” name under this column.
- Modified On: User will be able to view the “Modified On” Date under this column.
- Action: The Action menu will provide following functionalities:
 - Edit: Selecting “Edit” Icon as shown below in Figure , will allow user to Edit/Update the information: New Client Count, Existing Patient Count, Number of reviews, time, Scan Date, On-Hold(Checkbox), Remarks & Workflow as shown below in Figure: . Fields marked with (*) are mandatory.



Figure .: Edit Icon – Action.

Update Coding Productivity	
Ticket Number:	1289376
Provider Name:	Abary, Alexander
Date of Service From:	06/04/2023
Batch Type: Hospital	
Date of Service To:	06/08/2023
Productivity Type:	Coding
Number of Accounts:	2
Number of ICDs:	1
Time (minute):	Enter Time (minute)
On Hold:	<input type="checkbox"/>
Number of Reports:	4
Number of CPTs:	2
Scan Date:*	6/7/2023
Remarks:	average
Work Flow:	Reject
<input type="button" value="Cancel"/> <input type="button" value="Update"/>	

Figure .: Edit/Update Coding Productivity– Action

After Editing/Updating the Edit/Update Coding Productivity, User needs to click on “Update” to confirm the changes & if User clicks on “Cancel” option for any changes made will be discarded.

3. Rejected Logs

Add Rejection Logs

After selecting “Add New” from the “Rejection Logs List” menu, User will be redirected to the “Add Rejection Logs” Page as shown below on Figure: . Where user will be able to Add the Rejection Logs.

The screenshot shows a web-based form titled "Add Rejection Logs". The form has several sections for inputting patient and log details. At the top, there are fields for "Ticket Number" and "Provider Name", with a "Get Detail" button. Below these are fields for "Date of Service From" and "Date of Service To". The main body of the form contains sections for "Patient Name" (with a DOB field), "Sequence", "Account", "DOS" (date of service), "Location", "Reason to Reject" (with a dropdown menu), "Insurance Type" (with a dropdown menu), and "Attachment" (with a file selection field showing "Choose Files no files selected"). There are also dropdown menus for "Work Flow" and "File Name" (which shows "No Attachments Found"). At the bottom left are "Cancel" and "Add" buttons.

Figure .: Add Rejection Logs – Action

After filling all the necessary details in “Add Rejection Logs”, User needs to click on “Add” to confirm the changes & if User clicks on “Cancel” option for any changes made will be discarded.

After selecting “Rejected Logs” Link from the “Demo CE & Coding Validation Team Prod. & Process Workflow” menu from Dashboard, User will be redirected to the “Rejected Logs” Page as shown below on Figure: . Where user will be able to view the Rejected Logs List.

The screenshot shows a dashboard with a sidebar containing various links like Dashboard, Charge Batching System, Demo/CE/Coding Prod., Payment Batching System, Payment Productivity, Cashier Report, Process Manual, Doctor, Group, Insurance, Company, AR Database, Location, Payment Type, and Revenue Type. The main area is titled "Rejected Logs List" and includes a "Search" and "Print Batches" button. The search section has fields for "Keyword", "Reason to Reject", "Created Date From", "Status" (with radio buttons for Resolved, Completed, Pending), and "Doctor/Group Name" and "Work Flow" dropdowns. Below these are checkboxes for "New Rejections" and other filtering options. A table at the bottom lists rejected logs with columns for Action, Status, Location, Work Flow, Ticket No., Doctor Name, Reason to Reject, and Patient Name. One entry in the table is: Action (Edit/Pending), Status (Completed/Pending), Location (Office/Anaheim General Hosp), Work Flow (Internal/Argus TL), Ticket No. (1289381/1289355), Doctor Name (Access PCP/Abbas, Abdul), Reason to Reject (DE-Provide Patient Demographic/No CPT (CE)), and Patient Name (Test).

Figure no:

Rejected Logs will have the following Search filters:

- Keyword: User will be able to search by entering “Keyword”.
- Doctor/Group Name: User will be able to Select the Doctor/Group in “Doctor/Group Name” drop-down option.
- Reason to Reject: User will be able to Select the Reason in “Reason to Reject” drop-down option.
- Workflow: User will be able to select the Workflow from “Workflow” drop-down option.
- Created Date From: User will be able to select the date range from “Created -Date From” option.
- Created Date To: User will be able to select the date range from “Created - Date To” option.
- Status: User will be able to select any one status from checkbox option – Resolved, Completed & Pending.
 - Resolved: On click of the “Resolved” checkbox, user will be able to view all the resolved list.
 - Completed: On click of the “Completed” checkbox, user will be able to view all the completed list.

- Pending: On click of the “Pending” checkbox, user will be able to view all the Pending list, additionally user will be able to make few changes by selecting the following Action option as shown below in Figure:.

User will also be able to select other checkbox filters like:

- New Rejections
- 1st Due requests
- 1st request Records
- 2nd Due requests
- 2nd request Records
- Dummy CPT Records only

Above mentioned can be also be accessed from and Available under “Demo CE & Coding Validation Team Prod. & Process Workflow” menu from Dashboard.

User can select desired Search options as required. It is not Mandatory to fill all the Options provided.

After selecting the options, User will click on the “Search” button to search that task as per the Inputs provided. If the User clicks on the “Cancel” button, the selected Filters will be removed instantly.

Searched/List Rejected Logs will be displayed under the following Columns:

- Status: User will be able to view the “Status” number under this column.
- Location: User will be able to view the “Location” number under this column.
- Workflow: User will be able to view the “Workflow” under this column.
- Ticket No: User will be able to view the “Ticket No” number under this column.

- Doctor Name: User will be able to view the “Doctor Name” under this column.
- Reason to Reject: User will be able to view the “Reason to Reject” under this column.
- Patient Name: User will be able to view the “Patient Name” under this column.
- DOB: User will be able to view the date of birth “DOB” under this column.
- Sequence: User will be able to view the number of “Sequence” number under this column
- Account: User will be able to view the number of “Account” number under this column
- DOS: User will be able to view the “DOS” under this column.
- Insurance Type: User will be able to view the date of “Insurance Type” under this column.
- Batch Received: User will be able to view the “Batch Received” Date under this column.
- Created By: User will be able to view the “Created By” name under this column.
- Created On: User will be able to view the “Created On” date under this column.
- Date of 1st Request: User will be able to view the “Date of 1st Request” under this column.
- Date of 2nd Request: User will be able to view the “Date of 2nd Request” under this column.
- Action: The Action menu will provide following functionalities:

- Edit: Selecting “Edit” Icon as shown below in Figure , will allow user to Edit/Update the information: Number of Accounts, Number of Reports, Number of ICDs, Number of CPTs, Time, Scan Date, Onhold, Remarks & Workflow as shown below in Figure: . Fields marked with (*) are mandatory.



Figure .: Edit Icon – Action.

Figure .: Edit/Update Rejection Logs– Action

After Editing/Updating the Rejection Logs, User needs to click on “Mark as Rejected” to confirm the changes & if User clicks on “Cancel” option for any changes made will be discarded.

- Resolution: Selecting “Edit” Icon as shown below in Figure , will allow user to Update, Set as Resolved or Set as Rejected the information: Remarks , Date of 1st request to doctor, Date of 2nd, Resolution & Dummy CPT request as shown below in Figure: . Fields marked with (*) are mandatory.



Figure .: Resolution Icon – Action.

Figure .: Resolution – Action

After Editing/Updating the Resolution Logs, User needs to click on “Update” to confirm the changes, “Set as resolved” to mark it as resolved or “Set as rejected” to mark it as Rejected & if User clicks on “Cancel” option for any changes made will be discarded.

Excel Sheet Download

Selecting the “Excel” option will allow the user to download Excel sheet of the Rejection Logs details as shown below in Figure: .

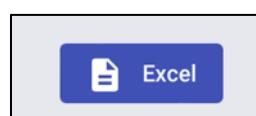


Figure no:

Figure no:

Print Batches

Selecting the “Print Batches” option will allow the user to view the Print Coding Productivity Section and can also download the Rejection Log sheet as shown below in Figure: .

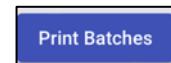


Figure no:

Figure no:

4. New Rejections

After selecting “New Rejections” Link from the “Demo CE & Coding Validation Team Prod. & Process Workflow” menu from Dashboard, User will be redirected to the “Rejected Logs” where the selected option will have highlighted checkbox as shown below on Figure: . Where user will be able to view the Rejected Logs List as per selected link.

The screenshot shows the 'Rejected Logs List' page of the Argus software. At the top, there are search filters for 'Keyword', 'Reason to Reject', 'Created Date From', 'Status', 'Doctor/Group Name', 'Work Flow', and 'Created Date (To)'. Below the filters is a table of rejected logs with columns: Action, Status, Location, Work Flow, Ticket No., Doctor Name, Reason to Reject, and Patient Name. The 'New Rejections' checkbox is highlighted with a red box. The table contains five rows of data.

Action	Status	Location	Work Flow	Ticket No.	Doctor Name	Reason to Reject	Patient Name
	Completed	Office	Internal	1289381	Access PCR/Inc	DE-Provide Patient Demographic	Test
	Pending	Anaheim General Hosp	Argus TL	1289355	Abbas, Abdul	No CPT (CE)	
	Completed	Anaheim General Hosp	Internal	1289376	Abari, Alexander	No CPT (CE)	afsd
	Resolved	Anaheim Terrace Care Center LLC	Internal	1289355	Abbas, Abdul	CE-Need BMI	TEST AUG
	Completed	Artesia Home Training	Argus TL	1289363	Ahn, Duke	CO-Need ICD	test July

Figure no:

Also, all the Search functionalities and other features are same as mentioned in “Rejection Logs”.

1st Requests Due

After selecting “1st Requests Due” Link from the “Demo CE & Coding Validation Team Prod. & Process Workflow” menu from Dashboard, User will be redirected to the “Rejected Logs” where the selected option will have highlighted checkbox as shown below on Figure: . Where user will be able to view the Rejected Logs List as per selected link.

The screenshot shows the 'Rejected Logs List' page of the Argus software. At the top, there are search filters for 'Keyword', 'Reason to Reject', 'Created Date From', 'Status', 'Doctor/Group Name', 'Work Flow', and 'Created Date (To)'. Below the filters is a table of rejected logs with columns: Action, Status, Location, Work Flow, Ticket No., Doctor Name, Reason to Reject, and Patient Name. The 'New Rejections' checkbox is highlighted with a red box. The table contains five rows of data.

Action	Status	Location	Work Flow	Ticket No.	Doctor Name	Reason to Reject	Patient Name
	Completed	Office	Internal	1289381	Access PCR/Inc	DE-Provide Patient Demographic	Test
	Pending	Anaheim General Hosp	Argus TL	1289355	Abbas, Abdul	No CPT (CE)	
	Completed	Anaheim General Hosp	Internal	1289376	Abari, Alexander	No CPT (CE)	afsd
	Resolved	Anaheim Terrace Care Center LLC	Internal	1289355	Abbas, Abdul	CE-Need BMI	TEST AUG
	Completed	Artesia Home Training	Argus TL	1289363	Ahn, Duke	CO-Need ICD	test July

Figure no:

Also, all the Search functionalities and other features are same as mentioned in “Rejection Logs”.

Number of 1st Requests

After selecting “Number of 1st Requests” Link from the “Demo CE & Coding Validation Team Prod. & Process Workflow” menu from Dashboard, User will be redirected to the “Rejected Logs” where the selected option will have highlighted checkbox as shown below on Figure: . Where user will be able to view the Rejected Logs List as per selected link.

Action	Status	Location	Work Flow	Ticket No.	Doctor Name	Reason to Reject	Patient Name
	Completed	Office	Internal	1289381	Access PCP/Inc	DE-Provide Patient Demographic	Test
	Pending	Anaheim General Hosp	Argus TL	1289355	Abbas, Abdul	No CPT (CE)	
	Completed	Anaheim General Hosp	Internal	1289376	Albary, Alexandre	No CPT (CE)	afsd
	Resolved	Anaheim Terrace Care Center LLC	Internal	1289355	Abbas, Abdul	CE-Need BMI	TEST AUG
	Completed	Artesia Home Training	Argus TL	1289363	Ahn, Duke	CO-Need ICD	test July

Figure no:

Also, all the Search functionalities and other features are same as mention in “Rejection Logs”.

2nd Requests Due

After selecting “2nd Requests Due” Link from the “Demo CE & Coding Validation Team Prod. & Process Workflow” menu from Dashboard, User will be redirected to the “Rejected Logs List” where the selected option will have highlighted checkbox as shown below on Figure: . Where user will be able to view the Rejected Logs List as per selected link.

Action	Status	Location	Work Flow	Ticket No.	Doctor Name	Reason to Reject	Patient Name
	Completed	Office	Internal	1289381	Access PCPInc	DE-Provide Patient Demographic	Test
	Pending	Anaheim General Hosp	Argus TL	1289355	Abbas, Abdul	No CPT (CE)	
	Completed	Anaheim General Hosp	Internal	1289376	Abari, Alexander	No CPT (CE)	afsd
	Resolved	Anaheim Terrace Care Center LLC	Internal	1289355	Abbas, Abdul	CE-Need BMI	TEST AUG
	Completed	Artesia Home Training	Argus TL	1289363	Ahn, Duke	CO-Need ICD	test July

Figure no:

Also, all the Search functionalities and other features are same as mentioned in “Rejection Logs”.

Number of 2nd Requests

After selecting “Number of 2nd Requests” Link from the “Demo CE & Coding Validation Team Prod. & Process Workflow” menu from Dashboard, User will be redirected to the “Rejected Logs” where the selected option will have highlighted checkbox as shown below on Figure: . Where user will be able to view the Rejected Logs List as per selected link.

The screenshot shows the 'Rejected Logs List' page of the Argus software. On the left is a sidebar with various icons and links. The main area has search fields for 'Keyword', 'Reason to Reject', 'Created Date From', 'Status' (with radio buttons for 'Resolved', 'Completed', and 'Pending'), and 'Doctor/Group Name' and 'Work Flow' dropdowns. Below these are checkboxes for 'New Rejections', '1st request due records', '2nd request due records', '1st request records', and '2nd request records'. The '2nd request records' checkbox is highlighted with a red box. At the bottom is a table with columns: Action, Status, Location, Work Flow, Ticket No., Doctor Name, Reason to Reject, and Patient Name. The table contains several rows of data.

Figure no:

Also, all the Search functionalities and other features are same as mentioned in “Rejection Logs”.

Dummy CPT Records Only

After selecting “Dummy CPT Records Only” Link from the “Demo CE & Coding Validation Team Prod. & Process Workflow” menu from Dashboard, User will be redirected to the “Rejected Logs” where the selected option will have highlighted checkbox as shown below on Figure: . Where user will be able to view the Rejected Logs List as per selected link.

This screenshot is identical to the one above, showing the 'Rejected Logs List' screen of the Argus software. The '2nd request records' checkbox is highlighted with a red box. The rest of the interface, including the sidebar, search fields, and table, is the same.

Figure no:

Also, all the Search functionalities and other features are same as mentioned in “Rejection Logs”.

Resolved Rejections

After selecting “Resolved Rejections” Link from the “Demo CE & Coding Validation Team Prod. & Process Workflow” menu from Dashboard, User will be redirected to the “Rejected Logs” where the selected option will have highlighted checkbox as shown below on Figure: . Where user will be able to view the Rejected Logs List as per selected link.

Action	Status	Location	Work Flow	Ticket No.	Doctor Name	Reason to Reject	Patient Name
	Completed	Office	Internal	1289381	Access PCPIn	DE-Provide Patient Demographic	Test
	Pending	Anaheim General Hosp	Argus TL	1289355	Abbas, Abdul	No CPT (CE)	
	Completed	Anaheim General Hosp	Internal	1289376	Arary, Alexander	No CPT (CE)	afsd
	Resolved	Anaheim Terrace Care Center LLC	Internal	1289355	Abbas, Abdul	CE-Need BMI	TEST AUG
	Completed	Artesia Home Training	Argus TL	1289363	Ahn, Duke	CO-Need ICD	test July

Figure no:

Also, all the Search functionalities and other features are same as mentioned in “Rejection Logs”.

Completed Rejections

After selecting “Completed Rejections” Link from the “Demo CE & Coding Validation Team Prod. & Process Workflow” menu from Dashboard, User will be redirected to the “Rejected Logs” where the selected option will have highlighted checkbox as shown below on Figure: . Where user will be able to view the Rejected Logs List as per selected link.

The screenshot shows the 'Rejected Logs List' interface. At the top, there are search filters for 'Keyword', 'Doctor/Group Name', 'Reason to Reject', 'Work Flow', 'Created Date From/To', and 'Status' (with 'Completed' being the selected option). Below the filters is a checkbox section for 'New Rejections' and various request types. A table at the bottom lists rejected logs with columns for Action, Status, Location, Work Flow, Ticket No., Doctor Name, Reason to Reject, and Patient Name. One row in the table is highlighted with a red border.

Action	Status	Location	Work Flow	Ticket No.	Doctor Name	Reason to Reject	Patient Name
	Completed	Office	Internal	1289381	Access PCP/Inc	DE-Provide Patient Demographic	Test
	Pending	Anaheim General Hosp	Argus TL	1289355	Abbas, Abdul	No CPT (CE)	
	Completed	Anaheim General Hosp	Internal	1289376	Abari, Alexander	No CPT (CE)	afsd
	Resolved	Anaheim Terrace Care Center LLC	Internal	1289355	Abbas, Abdul	CE-Need BMI	TEST AUG
	Completed	Artesia Home Training	Argus TL	1289363	Ahn, Duke	CO-Need ICD	test July

Figure no:

Also, all the Search functionalities and other features are same as mentioned in “Rejection Logs”.

User Can access it by Selecting -> Dashboard from Left Navigation bar.

4.1.20. Charge Batching System

4.1.20.1. Add Charge Batch

After selecting “Add Charge Batch” from the “Charge Batch System (CBS) Report” menu, User will be redirected to the “Add Charge Batch” Page as shown below on Figure: . Where user will be able to Add the New CE Productivity.

The screenshot shows the 'Add Charge Batch' form. It includes fields for 'Type' (dropdown), 'Doctor Office', 'Doctor/Group Name' (dropdown), 'Date of Service(From)' and 'Date of Service(To)' (date pickers), 'Number of Super Bills' (text input), 'Total no. of Pages' (text input), and 'Number of Attachments' (text input).

Figure .: Add Coding Productivity – Action

After filling all the necessary details in “Add Charge Batch”, User needs to click on “Add” to confirm the changes & if User clicks on “Cancel” option for any changes made will be discarded.

4.1.20.2. Charge Batching System (CBS) Report

After selecting the “Charge Batching System” option from the Left Navigation Bar, the system will allow the admin to view the Charge Batching System (CBS) Information in the “Charge Batching System (CBS) Report” menu as shown in below figure: . This page will appear from left navigation bar(Charge Batching System -> Charge Batching System (CBS) Report).

Action	Ticket No.	Type	Doctor Name	From	To	Posted By	CT Posted Dt.	Super Bills Doctor	Super Bills Argus	Attachments Doctor	Attachments Argus	Received By
No Records Found.												

Figure no:

On click of “Cancel” button, User will be able to view the full list of Charge Batching System (CBS) Report as shown below in Figure: .

Action	Ticket No.	Type	Doctor Name	From	To	Posted By	CT Posted Dt.	Super Bill Doctor	Super Bill Argus	Attachments Doctor	Attachments Arg
	1269375	CAP	Abbas, Abdul	05/27/2023	05/27/2023			1	0	1	0
	1269374	Hospital	Abbas, Abdul	05/23/2023	05/23/2023			2	0	2	0
	1269373	Home Health	Abbas, Abdul	05/22/2023	05/23/2023			0	0	30	0

Figure no:

Charge Batching System (CBS) Report will have the following search filters:

- Group/Doctor Name: User will be able to Select the Group/Doctor Name in “Group/Doctor Name” drop-down option.
- Type: User will be able to Select the Type of CBS report in “Type” drop-down option.
- Batch DOS (From): User will be able to select the Batch DOS date range from “Batch DOS (From)” option.
- Batch Received (From): User will be able to select the Batch Received date range from “Batch Received (From)” option.
- Created Posted Date From: User will be able to select the date range from “Created Posted Date From” option.

- **Created Date From:** User will be able to select the date range from “Created-Date From” option.
- **Ticket No.:** User will be able to enter the Ticket Number from “Ticket Number” option.
- **Received By:** User will be able to search by selecting name from in “Received By” drop-down option.
- **Posted By:** User will be able to search by selecting name from in “Posted By” drop-down option.
- **Checkbox:** User can select any one from the “Received, Not Received & All” checkbox.

User can select desired Search options as required. It is not Mandatory to fill all the Options provided.

After selecting the options, User will click on the “Search” button to search that task as per the Inputs provided. If the User clicks on the “Cancel” button, the selected Filters will be removed instantly.

Charge Batching System (CBS) Report will have the following columns:

- **Ticket:** User will be able to view the “Ticket” number under this column.
- **Type:** User will be able to view the “Type” name under this column.
- **Doctor Name:** User will be able to view the “Doctor Name” under this column.
- **From :** User will be able to view the “From Date” under this column.
- **To :** User will be able to view the “To Date” under this column.
- **CT Post Date:** User will be able to view the “CT Post Date” under this column.
- **Super Bills Doctor:** User will be able to view the “Super Bills Doctor” under this column.

- Super Bills Argus: User will be able to view the “Super Bills Argus” under this column.
- Received By: User will be able to view the “Received By” name under this column.
- Received Date: User will be able to view the “Received Date” under this column.
- Created By: User will be able to view the “Created By” name under this column.
- Created On: User will be able to view the “Created On” Date under this column.
- Modified By: User will be able to view the “Modified By” name under this column.
- Modified On: User will be able to view the “Modified On” Date under this column.
- Action: The Action menu will provide following functionalities:
 - Edit: Selecting “Edit” Icon as shown below in Figure , will allow user to Edit/Update the information: Type, Doctor/Group Name, Date of Service (From), Date of Service (To), Number of super Bills, Number of attachments & Remarks as shown below in Figure:.. Fields marked with (*) are mandatory.



Figure .: Edit Icon – Action.

Figure .: Edit/Update Charge Batching– Action

After Editing/Updating the Edit/Update Charge Batching, User needs to click on “Update” to confirm the changes & if User clicks on “Cancel” option for any changes made will be discarded.

- Receive: Selecting “Receive” Icon as shown below in Figure , will allow user to Edit/Update the Argus /coding Department information: Date Received, Received By, Number of Super Bills, Number of Attachments and Remarks as shown below in Figure:. . Fields marked with (*) are mandatory.

**Figure .: Edit Icon – Action.**

Updated By:	Updated Date:								
Charge Batch Details (Argus Office) <div style="display: flex; justify-content: space-between;"> <div style="width: 45%;"> Number of Super Bills: 10 Total Number of Pages: 20 Remarks: Received By: Rekha Mehral </div> <div style="width: 45%;"> Number of Attachments: 10 Received Date: 06/12/2023 </div> </div>									
Argus Coding Department <table style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 50%; padding-bottom: 10px;"> Date Received* <input type="text" value="6/12/2023"/> (i) </td> <td style="width: 50%; padding-bottom: 10px;"> Received By* <input type="text" value="Rekha Mehral"/> </td> </tr> <tr> <td style="padding-bottom: 10px;"> Number of Super Bills* <input type="text" value="10"/> </td> <td style="padding-bottom: 10px;"> Number of Attachments* <input type="text" value="10"/> </td> </tr> <tr> <td style="padding-bottom: 10px;"> Total No. of Pages <input type="text" value="20"/> </td> <td></td> </tr> <tr> <td colspan="2" style="padding-bottom: 10px;"> Remarks <input type="text" value="Remarks"/> </td> </tr> </table>		Date Received* <input type="text" value="6/12/2023"/> (i)	Received By* <input type="text" value="Rekha Mehral"/>	Number of Super Bills* <input type="text" value="10"/>	Number of Attachments* <input type="text" value="10"/>	Total No. of Pages <input type="text" value="20"/>		Remarks <input type="text" value="Remarks"/>	
Date Received* <input type="text" value="6/12/2023"/> (i)	Received By* <input type="text" value="Rekha Mehral"/>								
Number of Super Bills* <input type="text" value="10"/>	Number of Attachments* <input type="text" value="10"/>								
Total No. of Pages <input type="text" value="20"/>									
Remarks <input type="text" value="Remarks"/>									
<input type="button" value="Cancel"/> <input type="button" value="Update"/>									

Figure .: Argus Coding Department – Action

After Editing/Updating the Edit/Update Argus Coding Department, User needs to click on “Update” to confirm the changes & if User clicks on “Cancel” option for any changes made will be discarded.

- View: Selecting “View” Icon as shown below in Figure , will allow user to View the Charge Batching Details (Doctor Office) & Charge Batching Details (Argus Office) as shown below in Figure:.. Fields marked with (*) are mandatory.

**Figure .: Edit Icon – Action.**

 A screenshot of a software interface titled "View". It displays two sections: "Charge Batch Details (Doctor Office)" and "Charge Batch Details (Argus Office)". The Doctor Office section includes fields like Batch/Ticket No (1289381), Type (Hospital), Date of Service (From/To: 06/11/2023), Number of Super Bills (10), Total Number of Pages (20), Remarks, Prepared By (Bhupender Singh), Updated By, Provider Name (Access PCP Inc), Date of Service (To), Number of Attachments (10), Prepared Date (06/12/2023), and Updated Date. The Argus Office section includes fields like Number of Super Bills (10), Total Number of Pages (20), Remarks, Received By (Rekha Mehral), Posted By, Number of Attachments (10), Received Date (06/12/2023), and CT Date Posted. At the bottom left is a "Cancel" button.
Figure .: Argus Coding Department – Action

- Re-Update: Selecting “Re-Update” Icon as shown below in Figure , will allow user to Re-Update the Argus /coding Department information: Posted By & CT Posted Date as shown below in Figure:.. Fields marked with (*) are mandatory.

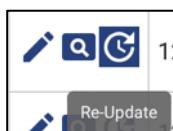


Figure .: Edit Icon – Action.

The screenshot shows a software interface titled "Re-Update". The top section is titled "Reject Log for Batch" and contains fields for "1st Request Due", "2nd Request Due", "Number of First Requests", "Number of Second Requests", "New Rejections", and "Resolved Rejections". Below this is the "Charge Batch Details (Argus Office)" section, which includes fields for "Number of Super Bills: 4", "Total Number of Pages: 9", "Remarks", "Received By: Shivam Kaushik", "Posted By", "Received Date: 06/10/2023", and "CT Date Posted: 06/10/2023". The bottom section is titled "Argus Coding Department" and has fields for "Posted By" (with a dropdown menu) and "CT Posted Date" (with a date picker set to 6/10/2023). At the bottom left are "Cancel" and "Update" buttons.

Figure .: Re-Update Argus Coding Department – Action

After Re-Updating the Argus coding Department information, User needs to click on “Update” to confirm the changes & if User clicks on “Cancel” option for any changes made will be discarded.

Excel Sheet Download

Selecting the “Excel” option will allow the user to download Excel sheet of the Charge Batching System details as shown below in Figure: .

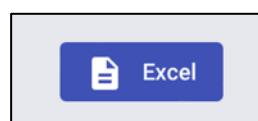


Figure no:

ID	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T	U
228981	3970/01/01	2023/06/11	Number of A	Number of B	Number of C	Number of D	Number of E	Number of F	Number of G	Number of H	Number of I	Number of J	Number of K	Number of L	Number of M	Number of N	Number of O	Number of P	Number of Q	Number of R	Number of S
228980	3970/01/01	2023/06/10	10	10	10	10	10	10	10	10	10	10	10	10	10	10	10	10	10	10	10
228979	3970/01/01	2023/06/06	5	5	5	5	5	5	5	5	5	5	5	5	5	5	5	5	5	5	5
228978	3970/01/01	2023/06/07	3	2	2	2	2	2	2	2	2	2	2	2	2	2	2	2	2	2	2
228977	3970/01/01	2023/06/04	2	2	2	2	2	2	2	2	2	2	2	2	2	2	2	2	2	2	2
228976	3970/01/01	2023/06/27	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1
228975	3970/01/01	2023/06/27	1	0	1	0	1	0	1	0	1	0	1	0	1	0	1	0	1	0	1
228974	3970/01/01	2023/06/23	2	0	2	0	2	0	2	0	2	0	2	0	2	0	2	0	2	0	2
228973	3970/01/01	2023/06/23	20	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
228972	3970/01/01	2023/06/23	20	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
228971	3970/01/01	2023/06/07	1	7	1	3	test														
228970	3970/01/01	2023/06/07	2	3	2	2	test														
228969	3970/01/01	2023/06/18	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1
228968	3970/01/01	2023/06/03	2	2	2	2	2	2	2	2	2	2	2	2	2	2	2	2	2	2	2
228967	3970/01/01	2023/02/14	2	2	2	3	1	test													
228966	3970/01/01	2023/02/03	2	2	2	2	2	2	2	2	2	2	2	2	2	2	2	2	2	2	2
228965	3970/01/01	2023/02/14	2	2	2	3	1	test													
228964	3970/01/01	2023/02/03	2	2	2	2	2	2	2	2	2	2	2	2	2	2	2	2	2	2	2
228963	3970/01/01	2023/02/03	2	2	2	2	2	2	2	2	2	2	2	2	2	2	2	2	2	2	2
228962	3970/01/01	2023/02/03	2	2	2	2	2	2	2	2	2	2	2	2	2	2	2	2	2	2	2
228961	3970/01/01	2023/02/14	2	2	2	3	1	test													
228960	3970/01/01	2023/02/03	2	2	2	2	2	2	2	2	2	2	2	2	2	2	2	2	2	2	2
228959	3970/01/01	2023/04/25	4	4	4	4	4	4	4	4	4	4	4	4	4	4	4	4	4	4	4
228958	3970/01/01	2023/04/07	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1
228957	3970/01/01	2023/04/07	0	3	22	2	2	test													
228956	3970/01/01	2023/04/07	1	1	2	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1
228955	3970/01/01	2023/04/03	2	2	2	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1
228954	3970/01/01	2023/04/03	2	2	2	2	2	2	2	2	2	2	2	2	2	2	2	2	2	2	2
228953	3970/01/01	2023/04/03	1	1	2	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1
228952	3970/01/01	2023/04/03	1	1	2	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1
228951	3970/01/01	2023/03/06	1	2	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1
228950	3970/01/01	2023/03/06	1	2	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1
228949	3970/01/01	2023/03/08	2	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1
228948	3970/01/02	2023/03/08	1	2	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1

Figure no:
Print Batches Download

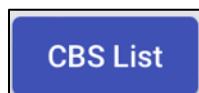
Selecting the “Print Batches” option will allow the user to view the Print Batches Section and can also download the Print Batches sheet of Charge Batching System details as shown below in Figure: .


Figure no:

Argus Medical Management, LLC. 5150 E.Pacific Coast Hwy, Suite 500 Long Beach CA 90804			
CHARGES/SUPERBILLS BATCH HEADER FORM			
Batch ID	1289381	Type	Hospital
Part 1 Doctor Office			
Office Name/Location	Access PCP.Inc.	Date/s of Service	06/11/2023 - 06/11/2023
Prepared by	Bhupender Singh	Total No. of Superbills	10
Date Prepared	06/12/2023	Total No. of Attachments	10
Total No. of Pages 20			
Notes:			
Part 2 Argus Coding Department			
Date Received	06/12/2023	Received By	Rekha Mehral
Total No. of Superbills	10	Superbill Difference	10
Total No. of Attachments	10	Attachment Difference	10
Total No. of Pages	20	Total Pages Difference	20
Notes:			

Figure no:**CBS List Download**

Selecting the “CBS List” option will allow the user to view the CBS List Section and can also download the CBS List sheet of Charge Batching System details as shown below in Figure: .

**Figure no:**

ARGUS MEDICAL MANAGEMENT, LLC. CHARGE BATCH SYSTEM														
Ticket #	Type	Doctor/Gro up Name	DOS	Super bills	Attached items	Total Pages	Prepared By	Date Prepared	Received By	Date Received	Posted By	Date Posted	Comment	Argus Comment
1289381	Hospital	Access PCPIn c/	06/11/2023 - 06/11/2023	10	10	20	Blupender Singh	06/12/2023	Rakha Mehta	06/12/2023				
1289380	Office	ABC/S an Barolo B Mario	06/01/2023 - 06/01/2023	4	5	9	Blupender Singh	06/10/2023	Shiva Kausik	06/10/2023		06/10/2023		
1289379	Hospital	Ashay, Alexan der/	06/06/2023 - 06/06/2023	2	3	5	Blupender Singh	06/08/2023	Shiva Kausik	06/06/2023		06/08/2023	Test	Test
1289378	Office	Elite Cardio Debganti, Himesh Prabhakar	06/07/2023 - 06/07/2023	5	2	7	Blupender Singh	06/08/2023	Abhishek Kausik	06/08/2023	Abhishek Kausik	06/08/2023		
1289376	Hospital	Ashay, Alexan der/	06/04/2023 - 06/08/2023	1	1	2	Blupender Singh	06/08/2023	Balwinder Singh	06/08/2023				
1289375	CAP	Abusai , Abdal Proheith	05/27/2023 - 05/27/2023	1	1	2	Blupender Singh	05/27/2023					test	

Figure no:**4.1.21. Charge Productivity**

After selecting the “Demo/CE/Coding Productivity” option from the Left Navigation Bar, the system will allow the admin to select from the following 1 of 4 Sub-section as mentioned:

Coding Productivity

After selecting the “Coding Productivity” option from the Left Navigation Bar (Demo/CE/Coding Productivity > Coding Productivity). User will be able to view the Coding Productivity Information in the “Coding Productivity” menu as shown in below figure: . This page will appear from left navigation bar Demo/CE/Coding Productivity.

Figure no:**Add Coding Productivity**

After selecting “Add New Coding” from the “Coding Productivity” menu, User will be redirected to the “Add Demo Productivity” Page as shown below on Figure: . Where user will be able to Add the New Coding Productivity.

The screenshot shows a web-based application form titled "Add Demo Productivity". The form is divided into several sections:

- Header:** "Add Demo Productivity" (in blue bar)
- Ticket Number:** Input field "Enter Ticket Number" and button "Get Detail".
- Provider Name:** Input field "Enter Provider Name".
- Date of Service From:** Input field "Enter Date of Service From".
- Batch Type:** Input field "Enter Batch Type".
- Date of Service To:** Input field "Enter Date of Service To".
- Productivity Type:** Input field "Enter Productivity Type" with value "Demo".
- New Patient Count:** Input field "Enter Number of ICDs".
- Existing Patient Count:** Input field "Enter Number of CPTs".
- Total Patients:** Input field "Enter Total Patients".
- Number of Reviews:** Input field "Enter Number of Reviews".
- Time (minute):** Input field "Enter Time (minute)".
- Scan Date:** Input field "Enter Scan Date" with placeholder "MM/DD/YYYY" and a calendar icon.
- On Hold:** A checkbox input field.
- Remarks:** A large input field "Enter Remarks".
- Buttons:** "Cancel" and "Add" buttons at the bottom left.

Figure .: Add Coding Productivity – Action

After filling all the necessary details in “Add Coding Productivity”, User needs to click on “Add” to confirm the changes & if User clicks on “Cancel” option for any changes made will be discarded.

Coding Productivity will have the following Search filters:

- Ticket No.: User will be able to search by entering “Ticket No”.
- Provider: User will be able to Select the Provider in “Provider” drop-down option.
- Posted Date From: User will be able to select the date range from “Posted-Date From” option.
- Scan Date (From): User will be able to select the date range from “Scan Date (From)” option.
- Posted By: User will be able to search by selecting name from in “Posted By” drop-down option.
- Workflow: User will be able to select the Workflow from “Workflow” drop-down option.
- On-Hold: User will be able to select “On-Hold” Check box.

User can select desired Search options as required. It is not Mandatory to fill all the Options provided.

After selecting the options, User will click on the “Search” button to search that task as per the Inputs provided. If the User clicks on the “Cancel” button, the selected Filters will be removed instantly.

Searched/List Coding Productivity will be displayed under the following Columns:

- Batch/Ticket: User will be able to view the “Batch/Ticket” number under this column.

- Product Type: User will be able to view the “Product Type” name under this column.
- Doctor Name: User will be able to view the “Doctor Name” under this column.
- Scan Date: User will be able to view the “Scan Date” under this column.
- CT Post Date: User will be able to view the “CT Post Date” under this column.
- Time: User will be able to view the “Time” under this column
- Workflow: User will be able to view the “Workflow” under this column.
- No. of Account: User will be able to view the “No. of Account” under this column.
- ICDs: User will be able to view the number of “ICDs” under this column
- CPTs: User will be able to view the number of “CPTs” under this column
- Number of Reports: User will be able to view the “Number of Reports” under this column
- Created Date: User will be able to view the “Created Date” under this column.
- Created By: User will be able to view the “Created By” name under this column.
- Modified By: User will be able to view the “Modified By” name under this column.
- Modified On: User will be able to view the “Modified On” Date under this column.
- Action: The Action menu will provide following functionalities:
 - Edit: Selecting “Edit” Icon as shown below in Figure , will allow user to Edit/Update the information: New Client Count, Existing Patient Count,

Number of reviews, time, Scan Date, On-Hold(Checkbox), Remarks & Workflow as shown below in Figure: . Fields marked with (*) are mandatory.



Figure :: Edit Icon – Action.

A screenshot of a web-based application titled "Update Coding Productivity". The form includes fields for Ticket Number (1289376), Provider Name (Abary, Alexander), Batch Type (Hospital), Date of Service From (06/04/2023), and Date of Service To (06/08/2023). The "Productivity Type" is set to "Coding". Under "Coding", there are fields for "Number of Accounts" (with a blue placeholder box), "Number of ICDs" (1), "Time (minute)" (Enter Time (minute)), "On Hold" (checkbox), "Remarks" (a large text area containing "average"), and "Scan Date" (6/7/2023). At the bottom, there are "Work Flow" options (Accept or Reject) and "Cancel" or "Update" buttons.

Figure :: Edit/Update Coding Productivity– Action

After Editing/Updating the Edit/Update Coding Productivity, User needs to click on “Update” to confirm the changes & if User clicks on “Cancel” option for any changes made will be discarded.

Demo Productivity

Add Demo Productivity

After selecting “Add New Demo” from the “Charge Batch Productivity” menu, User will be redirected to the “Add Demo Productivity” Page as shown below on Figure: . Where user will be able to Add the New Demo Productivity.

The screenshot shows a web-based application window titled "Add Demo Productivity". At the top, there are input fields for "Ticket Number" (with a placeholder "Enter Ticket Number" and a "Get Detail" button) and "Provider Name" (with a placeholder "Date of Service From" and "Date of Service To"). Below these, a section for "Productivity Type" is set to "Demo". The form contains several pairs of input fields: "New Patient Count" (placeholder "Enter Number of ICDs") and "Existing Patient Count" (placeholder "Enter Number of CPTs"); "Total Patients" (placeholder "Enter Total Patients") and "Number of Reviews" (placeholder "Enter Number of Reviews"); "Time (minute)" (placeholder "Enter Time (minute)") and "Scan Date:" (placeholder "MM/DD/YYYY" with a calendar icon); and "On Hold" (checkbox). A large text area labeled "Remarks" with the placeholder "Enter Remarks" is also present. At the bottom left are "Cancel" and "Add" buttons.

Figure .: Add Demo Productivity – Action

After filling all the necessary details in “Add Demo Productivity”, User needs to click on “Add” to confirm the changes & if User clicks on “Cancel” option for any changes made will be discarded.

After selecting the “Demo Productivity” option from the Left Navigation Bar (Demo/CE/Coding Productivity > Demo Productivity). User will be able to view the Demo Productivity Information in the “Demo Productivity” menu as shown in below figure: . This page will appear from left navigation bar Demo/CE/Coding Productivity.

The screenshot shows a dashboard titled "Argus" with a sub-header "The Physician Practice Management Company". The left sidebar includes links for "Dashboard", "Charge Batching System", "Demo/CE/Coding Prod.", "Coding Productivity", "O Demo Productivity" (which is highlighted with a red border), "O CE Productivity", "O Rejected Logs", "Payment Batching System", and "Payment Productivity". The main content area is titled "Demo Productivity" and contains a search form. The search form includes fields for "Ticket No." (placeholder "Enter Ticket No."), "Posted Date From" (two date pickers), "Posted By" (dropdown), "On Hold" (checkbox), "Provider" (dropdown), "Select Provider" (dropdown), "Scan Date (From)" (two date pickers), "Work Flow" (dropdown), and "Select Work Flow" (dropdown). An "Add New Demo" button is located at the top right of the search form, and an "Excel" export icon is at the top right of the main content area.

Figure no:

Demo Productivity will have the following search filters:

- Ticket No.: User will be able to enter the Ticket Number from “Ticket Number” option.
- Provider: User will be able to Select the Name in “Provider” drop-down option.
- Posted Date From: User will be able to select the date range from “Posted Date From” option.
- Scan Date From: User will be able to select the date range from “Scan Date From” option.
- Posted By: User will be able to search by selecting name from in “Posted By” drop-down option.
- Workflow: User will be able to search by selecting workflow from in “Workflow” drop-down option.
- Checkbox: User can select “On Hold” checkbox.

User can select desired Search options as required. It is not Mandatory to fill all the Options provided.

After selecting the options, User will click on the “Search” button to search that task as per the Inputs provided. If the User clicks on the “Cancel” button, the selected Filters will be removed instantly.

Demo Productivity will have the following columns:

- Batch/Ticket#: User will be able to view the “Batch/Ticket#” number under this column.
- Product Type: User will be able to view the “Product Type” name under this column.
- Doctor Name: User will be able to view the “Doctor Name” under this column.
- Scan Date: User will be able to view the “Scan Date” under this column.
- CT Post Date: User will be able to view the “CT Post Date” under this column.
- Time: User will be able to view the “Time” under this column.
- Workflow: User will be able to view the “Workflow” under this column.
- No of Reviews: User will be able to view the “No of Reviews” under this column.
- New Patient: User will be able to view the “New Patient” name under this column.
- Existing Patient: User will be able to view the “Existing Patient” name under this column.
- Created By: User will be able to view the “Created By” name under this column.
- Created On: User will be able to view the “Created On” Date under this column.
- Modified By: User will be able to view the “Modified By” name under this column.

- Modified On: User will be able to view the “Modified On” Date under this column.
- Action: The Action menu will provide following functionalities:
 - Edit: Selecting “Edit” Icon as shown below in Figure , will allow user to Edit/Update the information: New Patient Count, Existing Patient Count, Total Patients, Number of reviews, Time, Scan Date, On Hold (Checkbox) Remarks & Workflow as shown below in Figure:.. Fields marked with (*) are mandatory.



Figure .: Edit Icon – Action.

Update Demo Productivity

Ticket Number:	1289381	Batch Type:	Hospital
Provider Name:	Access PCP, Inc	Date of Service From:	06/11/2023
Date of Service To:	06/11/2023		
Productivity Type:	Demo		
New Patient Count:	10	Existing Patient Count:	10
Total Patients:	20	Number of Reviews:	10
Time (minute):	166.7	Scan Date:	6/11/2023
On Hold:	<input type="checkbox"/>		
Remarks:	Enter Remarks		
Work Flow	Select Work Flow		
<input type="button" value="Cancel"/> <input type="button" value="Update"/>			

Figure .: Edit/Update Demo Productivity– Action

After Editing/Updating Demo Productivity, User needs to click on “Update” to confirm the changes & if User clicks on “Cancel” option for any changes made will be discarded.

Selecting the “Excel” option will allow the user to download Excel sheet of the Demo Productivity details as shown below in Figure:.

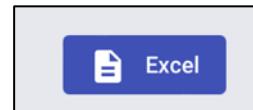


Figure no:

Ticket#	Scan Date	Time	Work Flow	On Hold	Remarks	Number of R New Patient Existing Pati Productivity	Created By	Created On	Modified By	Modified On
106613	2023/06/12	166.7	33.33 Payment Reversal	False		10 0 20 Demo	Rajender Singh	2023/06/12	Rajender S	2023/06/12
106613	2023/06/12	166.7	33.33 Payment Reversal	True		1 0 4 Demo	Riya Chaudhary	2023/06/12	Riya Chaudh	2023/06/12
106614	2023/06/12	16.67	33.33 Payment Reversal	False		1 1 0 2 Demo	Rajender Singh	2023/06/12	Rajender S	2023/06/12
106614	2023/06/12	16.67	33.33 Payment Reversal	True		2 0 2 Demo	Rajender Singh	2023/06/12	Rajender S	2023/06/12
106615	2023/05/23	16.67	33.33 Payment Reversal	False	test	2 0 0 0 Demo	Riya Chaudhary	2023/05/23	Riya Chaudh	2023/05/23
106615	2023/05/23	16.67	33.33 Payment Reversal	True	test	2 0 0 0 Demo	Riya Chaudhary	2023/05/23	Riya Chaudh	2023/05/23
106616	2023/04/27	16.67	33.33 Payment Reversal	False	rgflgf	2 0 0 0 Demo	Riya Chaudhary	2023/04/27	Riya Chaudh	2023/04/27
106616	2023/04/27	16.67	33.33 Payment Reversal	True	test	2 0 0 0 Demo	Riya Chaudhary	2023/04/27	Riya Chaudh	2023/04/27
106617	2023/04/21	16.67	33.33 Payment Reversal	False	test	0 0 0 0 Demo	Rajender Singh	2023/04/21	Rajender S	2023/04/21
106617	2023/04/21	16.67	33.33 Payment Reversal	True	test	0 0 0 0 Demo	Rajender Singh	2023/04/21	Rajender S	2023/04/21
106618	2023/04/21	30	Internal	False	test	0 0 0 0 Demo	Rajender Singh	2023/04/21	Rajender S	2023/04/21
106618	2023/04/21	30	Internal	True	test	0 0 0 0 Demo	Rajender Singh	2023/04/21	Rajender S	2023/04/21
106619	2023/03/21	34	Internal	False	test	0 0 0 0 Demo	Rajender Singh	2023/03/21	Rajender S	2023/03/21
106620	2023/03/20	22	Internal	False	test	3 0 0 0 Demo	Rajender Singh	2023/03/20	Rajender S	2023/03/20
106620	2023/03/20	16.67	33.33 Internal	False	test	2 0 0 0 Demo	Rajender Singh	2023/03/20	Rajender S	2023/03/20
106621	2023/03/20	16.67	33.33 Internal	False	test 1	2 5 0 0 Demo	Rajender Singh	2023/03/20	Rajender S	2023/03/20
106621	2023/03/20	23.34	33.33 Internal	False	test 1 NO CI	2 2 0 0 Demo	Rajender Singh	2023/03/20	Rajender S	2023/03/20
106622	2023/02/22	22	Argus TL	False	test 1	2 3 0 0 Demo	Rajender Singh	2023/02/22	Rajender S	2023/02/22
106622	2023/02/22	44	Internal	False	test rejct	2 0 0 0 Demo	Rajender Singh	2023/02/22	Rajender S	2023/02/22
106623	2023/02/22	1	Argus TL	False	test	2 0 0 0 Demo	Rajender Singh	2023/02/22	Rajender S	2023/02/22
106624	2023/02/20	16.67	33.33 Internal	False	test1	1 2 0 0 Demo	Riya Chaudhary	2023/02/20	Riya Chaudh	2023/02/20
106624	2023/02/20	33.34	33.34 Internal	False	test	2 0 0 0 Demo	Riya Chaudhary	2023/02/20	Riya Chaudh	2023/02/20
106625	2023/01/02	50	Internal	False	test	5 0 0 0 Demo	Poonam Chowdhary	2023/01/02	Poonam Ch	2023/01/02
106625	2023/01/02	30	Internal	False	test	3 0 0 0 Demo	Poonam Chowdhary	2023/01/02	Poonam Ch	2023/01/02
106626	2023/01/02	77	Internal	False	test	7 1 0 0 Demo	Poonam Chowdhary	2023/01/02	Poonam Ch	2023/01/02
106626	2013/12/30	167	Internal	False	test	8 0 0 0 Demo	Poonam Chowdhary	2013/12/30	Poonam Ch	2013/12/30
106627	2013/12/30	16.67	33.33 Internal	False	test	1 7 0 2 Demo	Rajender Singh	2013/12/30	Rajender S	2013/12/30

Figure no:

Print Productivity

Selecting the “Print Productivity” option will allow the user to view the Print Productivity Section and can also download the Print Productivity sheet as shown below in Figure: .



Figure no:

ARGUS MEDICAL MANAGEMENT, LLC. CHARGE BATCH SYSTEM										
Ticket #	Prod Type	Doctor/Croup Name	Scan date	Created Date	Created By	Time	Number of Revies	New Patient	Existing Patient	Workflow
106618	Demo	Acnos PC200r	06/12/2023	06/12/2023	Rajender Singh	16.67	10	0	20	Payment Reversal
106619	Demo	Bell Matrix	06/12/2023	06/12/2023	Riya Chaudhary	33.34	1	0	4	Payment Reversal
106620	Demo	ABC/San Ramon, Meto	05/26/2023	05/26/2023	Riya Chaudhary	38.67	1	0	2	Reject
106621	Demo	Ahoy, Almond!	05/21/2023	05/21/2023	Rajender Singh	38.67	2	0	2	Payment Reversal
106622	Demo	NAPFMU/Whiter'	05/01/2023	05/01/2023	Riya Chaudhary	38.67	2	0	0	Reject
106623	Demo	Ahoy, Almond!Produkt	04/27/2023	04/26/2023	Riya Chaudhary	38.67	2	0	0	Reject
106624	Demo	ABC/San Ramon, Meto	04/26/2023	04/26/2023	Riya Chaudhary	38.67	2	0	0	Internal
106625	Demo	Saint, Metrics!Produkt	04/23/2023	04/23/2023	Rajender Singh	33.34	0	0	0	Internal
106626	Demo	Ahoy, Almond!Produkt	04/09/2023	04/09/2023	Rajender Singh	30	0	0	0	Internal
106627	Demo	ABC/San Ramon, Meto	03/31/2023	03/30/2023	Rajender Singh	34	0	0	0	Internal
106628	Demo	Pro!Produkt	03/06/2023	03/06/2023	Rajender Singh	22	3	0	0	Internal
106629	Demo	Saint, Metrics!Produkt	03/06/2023	03/06/2023	Rajender Singh	38.67	2	0	0	Internal
106630	Demo	Pro!Produkt	03/06/2023	03/06/2023	Rajender Singh	23.34	2	5	0	Internal
106631	Demo	Pro!Produkt	02/28/2023	02/28/2023	Rajender Singh	23.34	2	1	3	Reject
106632	Demo	NAPFMU/Whiter'	02/23/2023	02/23/2023	Rajender Singh	22	2	0	0	Argus TL
106633	Demo	NAPFMU/Whiter'	02/23/2023	02/23/2023	Rajender Singh	44	2	0	0	Internal
106634	Demo	Ibara, Radcliffe!Produkt	02/23/2023	02/23/2023	Rajender Singh	1	2	0	0	Argus TL
106635	Demo	Pro!Produkt	02/23/2023	02/23/2023	Riya Chaudhary	38.67	1	2	0	Internal
106636	Demo	Fairy Medical Group Inc'	01/05/2014	01/05/2014	Poonam Chowdhary	33.34	2	4	0	Internal
106637	Demo	Fairy Medical Group Inc'	01/05/2014	01/05/2014	Poonam Chowdhary	50	5	0	0	Internal
106638	Demo	Fairy Medical Group Inc'	01/05/2014	01/05/2014	Poonam Chowdhary	30	3	0	0	Internal
106639	Demo	Fairy Medical Group Inc'	01/05/2014	01/05/2014	Poonam Chowdhary	77	7	1	1	Internal
106640	Demo	Fairy Medical Group Inc'	01/05/2014	01/05/2014	Poonam Chowdhary	167	8	13	0	Internal
106641	Demo	Chamber, Geppry VTC	12/30/2013	01/05/2014	Poonam Chowdhary	38.67	1	7	2	Internal
106642	Demo	Chamber, Geppry VTC	12/30/2013	01/05/2014	Poonam Chowdhary	80	6	3	0	Internal
106643	Demo	Chamber, Geppry VTC	12/30/2013	01/05/2014	Poonam Chowdhary	40	0	6	0	Internal
106644	Demo	Chamber, Geppry VTC	12/30/2013	01/05/2014	Poonam Chowdhary	40	4	0	0	Internal
106645	Demo	Chamber, Geppry VTC	12/30/2013	01/05/2014	Raja Kumar	230	14	9	0	Internal

Figure no:**CE Productivity****Add CE Productivity**

After selecting “Add New CE” from the “CE Productivity” menu, User will be redirected to the “Add CE Productivity” Page as shown below on Figure: . Where user will be able to Add the New CE Productivity.

Figure .: Add Coding Productivity – Action

After filling all the necessary details in “Add CE Productivity”, User needs to click on “Add” to confirm the changes & if User clicks on “Cancel” option for any changes made will be discarded.

After selecting the “CE Productivity” option from the Left Navigation Bar (Demo/CE/Coding Productivity > CE Productivity). User will be able to view the CE Productivity Information in the “CE Productivity” menu as shown in below figure: . This page will appear from left navigation bar Demo/CE/Coding Productivity.

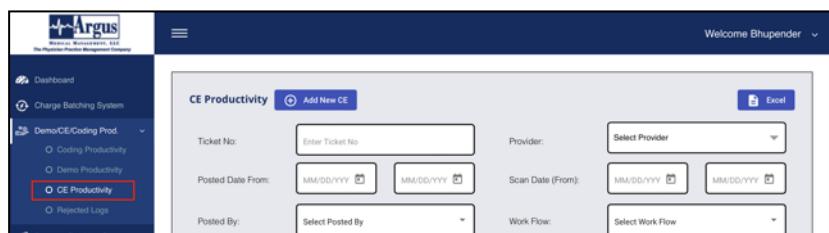


Figure no:

CE Productivity will have the following search filters:

- Ticket No.: User will be able to enter the Ticket Number from “Ticket Number” option.
- Provider: User will be able to Select the Name in “Provider” drop-down option.
- Posted Date From: User will be able to select the date range from “Posted Date From” option.
- Scan Date From: User will be able to select the date range from “Scan Date From” option.
- Posted By: User will be able to search by selecting name from in “Posted By” drop-down option.
- Workflow: User will be able to search by selecting workflow from in “Workflow” drop-down option.
- Checkbox: User can select “On Hold” checkbox.

User can select desired Search options as required. It is not Mandatory to fill all the Options provided.

After selecting the options, User will click on the “Search” button to search that task as per the Inputs provided. If the User clicks on the “Cancel” button, the selected Filters will be removed instantly.

CE Productivity will have the following columns:

- Batch/Ticket#: User will be able to view the “Batch/Ticket#” number under this column.
- Product Type: User will be able to view the “Product Type” name under this column.
- Doctor Name: User will be able to view the “Doctor Name” under this column.
- Scan Date: User will be able to view the “Scan Date” under this column.
- CT Post Date: User will be able to view the “CT Post Date” under this column.
- Time: User will be able to view the “Time” under this column.
- Workflow: User will be able to view the “Workflow” under this column.
- No of Acc: User will be able to view the “No of Acc” under this column.
- FFS: User will be able to view the “FFS” under this column.
- CAP: User will be able to view the “CAP” under this column.
- Created By: User will be able to view the “Created By” name under this column.
- Created On: User will be able to view the “Created On” Date under this column.
- Modified By: User will be able to view the “Modified By” name under this column.

- Modified On: User will be able to view the “Modified On” Date under this column.
- Action: The Action menu will provide following functionalities:
 - Edit: Selecting “Edit” Icon as shown below in Figure , will allow user to Edit/Update the information: CT Posted Date, Number of Accounts, No. of FFS Transactions, , No. of CAP Transactions Time, Scan Date, On Hold (Checkbox) Remarks & Workflow as shown below in Figure:.. . Fields marked with (*) are mandatory.



Figure :: Edit Icon – Action.

Update CE Productivity	
Productivity Type:	CE
CT Posted Date:	<input type="text"/> MM/DD/YYYY
No. of FFS Transactions:	<input type="text"/> 0
Time (minute):	<input type="text"/> 0
On Hold:	<input type="checkbox"/>
Remarks:	<input type="text"/> Enter Remarks
Work Flow	<input type="text"/> Select Work Flow
<input type="button"/> Cancel <input type="button"/> Update	

Figure :: Edit/Update Demo Productivity– Action

After Editing/Updating CE Productivity, User needs to click on “Update” to confirm the changes & if User clicks on “Cancel” option for any changes made will be discarded.

Selecting the “Excel” option will allow the user to download Excel sheet of the Demo Productivity details as shown below in Figure: .

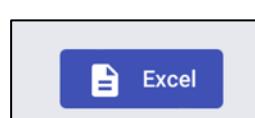


Figure no:

Ticket#	Scan Date	Time	Work Flow	On Hold	Remarks	Number of A/F/S	CAP	Productivity	Created By	Created On	Modified By	Modified On	
10665	2023/06/14			False	test	2	3	CE	Bhupender Singh	2023/06/14	null null	1970/01/01	
10664	2023/06/14	2	Reject	False	test	2	1	1 CE	Bhupender Singh	2023/06/14	Bhupender Singh	2023/06/14	
10661	2023/06/10			Reject	False	4	4	3 CE	Riya Chaudhary	2023/06/10	Riya Chaudhary	2023/06/12	
10660	2023/06/10			Reject	False	3	2	2 CE	Riya Chaudhary	2023/06/10	Riya Chaudhary	2023/06/12	
10659	2023/06/08			False	test	1	4	0 CE	Bhupender Singh	2023/06/08	null null	1970/01/01	
10657	2023/05/24	60 Argus TL		False	test	1	1	1 CE	Riya Chaudhary	2023/05/24	Riya Chaudhary	2023/06/08	
10652	2023/05/18			Reject	False	1	1	1 CE	Text User	2023/05/18	null null	1970/01/01	
10633	2023/05/17	30 Internal		False	remark	222	2	2 CE	Bhupender Singh	2023/05/17	Bhupender Singh	2023/05/11	
10624	2023/05/06			Internal	True	test charge p	333	1	1 CE	Riya Chaudhary	2023/05/06	Riya Chaudhary	2023/06/12
10609	2023/03/22	11 Internal		False		22	2	2 CE	Bhupender Singh	2023/03/23	Bhupender Singh	2023/04/07	
10608	2023/03/17	30 Internal		True	test	1	1	1 CE	Riya Chaudhary	2023/03/17	Riya Chaudhary	2023/06/12	
10600	2023/03/17	11 Internal		True		44	2	2 CE	Riya Chaudhary	2023/03/17	Riya Chaudhary	2023/06/12	
10593	2014/01/02	11 Internal		False	test	49	1	1 CE	Bhupender Singh	2014/01/02	Bhupender Singh	2014/01/15	
10592	2014/01/02	11 Internal		False	check	1	0	1 CE	Bhupender Singh	2014/01/06	Bhupender Singh	2014/05/05	
10591	2014/01/02	11 Internal		False	check	2	0	2 CE	Bhupender Singh	2014/01/06	Bhupender Singh	2014/05/04	
10590	2014/01/03			False		0	32	0 CE	Asim Mallick	2014/01/06	null null	1970/01/01	
10589	2013/12/30	0		False		0	0	0 CE	Shalu Agarwal	2014/01/06	null null	1970/01/01	
10587	2013/12/30	5		False		4	0	0 CE	Shalu Agarwal	2014/01/06	null null	1970/01/01	

Figure no:

Print Productivity

Selecting the “Print Productivity” option will allow the user to view the Print Productivity Section and can also download the Print Batches sheet of CE Productivity details as shown below in Figure: .

Print Productivity
Figure no:

ARGUS MEDICAL MANAGEMENT, LLC. CHARGE BATCH SYSTEM												
Ticket #	Prod Type	Doctor Group Name	Scan date	Created Date	Created By	Time	Number of Accounts	ZFS	CAP	Workflow		
1289184	CE	Ashley, Alisa/Leanne	06/14/2023	06/14/2023	Bhupender Singh	2	3	0	0			
1289183	CE	Ashley, Alisa/Leanne	06/14/2023	06/14/2023	Bhupender Singh	2	2	1	1	Reject		
1289180	CE	ABC/Jan Bandhona, Mata	06/14/2023	06/14/2023	Riya Chaudhary	4	4	1	1	Reject		
1289179	CE	Ashley, Alexander/Elie Carlo-Delphine, House/Pediatric	06/08/2023	06/08/2023	Riya Chaudhary	3	2	2				
1289177	CE	Ashley, Alexander/Elie Carlo-Delphine, House/Pediatric	06/08/2023	06/08/2023	Bhupender Singh	60	1	1	1	Argus TL,		
1289169	CE	ABC/Jan Bandhona, Mata	05/18/2023	05/18/2023	Text User	1	4	0	0	Reject		
1289159	CE	Ashley, Alisa/Leanne	04/17/2023	04/17/2023	Bhupender Singh	30	22	2	2	Internal		
1289156	CE	ABC/Jan Bandhona, Mata	03/06/2023	03/06/2023	Riya Chaudhary	333	1	1	1	Internal		
1289154	CE	Ibans, Radhika/Preethi	02/23/2023	02/23/2023	Bhupender Singh	11	22	2	2	Internal		
1289153	CE	Preethi/Ibans, Radhika/Preethi	02/17/2023	02/17/2023	Riya Chaudhary	30	1	1	1	Internal		
1289075	CE	Ibans, Radhika/Preethi	12/10/2023	01/06/2024	Riya Chaudhary	1	44	2	2	Internal		
1288644	CE	Chen, Hsiao/Chen, Hsiao	05/02/2014	01/06/2014	Bhupender Singh	11	49	1	1	Reject		
1288640	CE	Chen, Hsiao/Chen, Hsiao	05/02/2014	01/06/2014	Bhupender Singh	11	1	0	1	Internal		
1288025	CE	NAPMU/Whitney	05/02/2014	01/06/2014	Bhupender Singh	11	2	0	2	Internal		
1288041	CE	Chen, Hsiao/Chen, Hsiao	05/05/2014	01/06/2014	Asim Mallick	0	32	0	0			
1288039	CE	Zeta, Daniel/Zeta, Daniel	12/06/2013	01/06/2014	Shalu Agarwal	0	0	0	0			
1288038	CE	Zeta, Daniel/Zeta, Daniel	12/06/2013	01/06/2014	Shalu Agarwal	5	4	0	0			
1288037	CE	Zeta, Daniel/Zeta, Daniel	12/06/2013	01/06/2014	Shalu Agarwal	30	10	0	0			
1288048	CE	Zeta, Daniel/Zeta, Daniel	12/06/2013	01/06/2014	Shalu Agarwal	5	3	0	0			
1288048	CE	Holmes, Christopher/Holmes, Christopher	12/06/2013	01/06/2014	Shalu Agarwal	5	3	0	0			
1288040	CE	Chamber, Gregory YC/Chamber, Gregory YC	12/06/2013	01/06/2014	Shalu Agarwal	30	11	0	0			
1288049	CE	Chamber, Gregory YC/Chamber, Gregory YC	12/06/2013	01/06/2014	Shalu Agarwal	30	9	0	0			
1288050	CE	Holmes, Christopher/Holmes, Christopher	12/06/2013	01/06/2014	Shalu Agarwal	30	23	0	0			
1288052	CE	Mondira, Aastil/Mondira, Aastil	12/06/2013	01/06/2014	Shalu Agarwal	5	2	0	0			
1288051	CE	Mondira, Aastil/Mondira, Aastil	12/06/2013	01/06/2014	Shalu Agarwal	15	9	0	0			
1288050	CE	Mondira, Aastil/Mondira, Aastil	12/06/2013	01/06/2014	Shalu Agarwal	20	17	0	0			
1288049	CE	Mondira, Aastil/Mondira, Aastil	12/06/2013	01/06/2014	Shalu Agarwal	30	30	0	0			
1288051	CE	Chamber, Gregory YC/Chamber, Gregory YC	12/06/2013	01/06/2014	Dawn Toring	113	27	0	0			

Figure no:**Rejected Logs**

After selecting the “Rejected Logs” option from the Left Navigation Bar (Demo/CE/Coding Productivity > Rejected Logs). User will be able to view the Rejected Logs Information in the “Rejected Logs List” menu as shown in below figure: . This page will appear from left navigation bar Demo/CE/Coding Productivity.

Action	Status	Location	Work Flow	Ticket No.	Doctor Name	Reason to Reject	Patient Name
<input type="button" value="Edit"/> <input type="button" value="Delete"/>	Pending	Caring House	Internal	1289383	Abbas, Abdul	CE-Need CPT	test 1112
<input type="button" value="Edit"/> <input type="button" value="Delete"/>	Completed	Office	Internal	1289381	Access PCP/Inc	DE-Provide Patient Demographic	Test
<input type="button" value="Edit"/> <input type="button" value="Delete"/>	Pending	Anaheim General Hosp	Argus TL	1289355	Abbas, Abdul	No CPT (CE)	Test patient
<input type="button" value="Edit"/> <input type="button" value="Delete"/>	Completed	Anaheim General Hosp	Internal	1289376	Abary, Alexander	No CPT (CE)	afsd
<input type="button" value="Edit"/> <input type="button" value="Delete"/>	Resolved	Anaheim Terrace Care Center LLC	Internal	1289355	Abbas, Abdul	CE-Need BMI	TEST AUG

Figure no:

Also, User can access the Rejected Logs by selecting “Rejected Logs” Link from the “Demo CE & Coding Validation Team Prod. & Process Workflow” menu from Dashboard, User will be redirected to the “Rejected Logs List” (Reference- Page: 163)

4.1.22. Payment Batching System**4.1.22.1. Add Payment Batch**

After selecting “Add Payment Batch” from the “Payment Batch System (PBS) Report” menu, User will be redirected to the “Add Payment Batch” Page as shown below on Figure: . Where user will be able to Add the New Payment Batch.

Figure .: Add Payment Batch – Action

After filling all the necessary details in “Add Payment Batch”, User needs to click on “Add” to confirm the changes & if User clicks on “Cancel” option for any changes made will be discarded.

4.1.22.2. Payment Batching System (PBS) Report

After selecting the “Payment Batching System” option from the Left Navigation Bar, the system will allow the admin to view the Payment Batching System (CBS) Information in the “Payment Batching System (PBS) Report” menu as shown in below figure: . This page will appear from left navigation bar(Charge Batching System -> Charge Batching System (CBS) Report).

Figure no:

On click of “Cancel” button, User will be able to view the full list of Payment Batching System (PBS) Report as shown below in Figure: .

Figure no:

Payment Batching System (PBS) Report will have the following search filters:

- Billing Month: User will be able to Select the Month in “Billing Month” drop-down option.
- Billing Year: User will be able to Select the Year in “Billing Year” drop-down option.
- Ticket No.: User will be able to enter the ticket number in “Ticket No.” option.
- Group/Doctor Name: User will be able to Select the Group/Doctor Name in “Group/Doctor Name” drop-down option.

- Payment Type: User will be able to Select the Type of Payment in “Payment Type” drop-down option.
- PH Doctor Name: User will be able to Select the PH Doctor Name in “PH Doctor Name” drop-down option.
- Revenue Type: User will be able to Select the Type of Revenue in “Revenue Type” drop-down option.
- Money Source: User will be able to Select the Source in “Money Source” drop-down option.
- Insurance: User will be able to Select the Insurance in “Insurance” drop-down option.
- ERA Check#: User will be able to enter the ERA Check number in “ERA Check#.” option.
- Posted By: User will be able to search by selecting name from in “Posted By” drop-down option.
- Created Date From & To: User will be able to select the date range from “Created Date From & To” option.
- CT Posted Date From & To: User will be able to select the date range from “CT Posted Date From & To” option
- Deposit Date From & To: User will be able to select the date range from “Deposit Date From & To” option.
- Transaction Type: User will be able to select any one checkbox – Not Posted, Posted & All.
- Checkbox: User will be able to select any one from the “NDBA, Old prior AR & Suspense Account” Checkbox.

User can select desired Search options as required. It is not Mandatory to fill all the Options provided.

After selecting the options, User will click on the “Search” button to search that task as per the Inputs provided. If the User clicks on the “Cancel” button, the selected Filters will be removed instantly.

Payment Batching System (PBS) Report will have the following columns:

- Ticket: User will be able to view the “Ticket” number under this column.
- Batch Month: User will be able to view the “Batch Month” name under this column.
- Doctor Name: User will be able to view the “Doctor Name” under this column.
- Deposit Date: User will be able to view the “Deposit Date” under this column.
- Payment: User will be able to view the “Payment” under this column.
- Insurance: User will be able to view the “Insurance” name under this column.
- Created By: User will be able to view the “Created By” name under this column.
- Posted By: User will be able to view the “Posted By” name under this column.
- Posted On: User will be able to view the “Posted On” Date under this column.
- CT Posted Date: User will be able to view the “CT Posted Date” under this column.
- Deposit Amt.: User will be able to view the “Deposit Amt” in dollars under this column.

- NDBA: User will be able to view the “NDBA” under this column.
- Revised Date: User will be able to view the “Revised Date” under this column.
- Modified By: User will be able to view the “Modified By” name under this column.
- Modified On: User will be able to view the “Modified On” Date under this column.
- Action: The Action menu will provide following functionalities:
 - Revise: Selecting “Revise” Icon as shown below in Figure , will allow user to Revise the information: Billing Month, Billing Year, Deposit Date From, ERA Check#, Group/Doctor Name, PH Doctor Name, Payment Type, Revenue Type, Money Source, Insurance Name, Credit Card, Vault, Tele check, Deposit Amt, NDBA & Comment as shown below in Figure:. . Fields marked with (*) are mandatory.



Figure .: Revise Icon – Action.

Revise Payment Batch

Billing Month*	Jun	Billing Year*	2023
Deposit Date From*	6/8/2023	ERA Check#	78676
Group/Doctor Name*	ProHealth	PH Doctor Name	
Payment Type*	Ancillary Income	Revenue Type	
Money Source	LockBox	Insurance Name	1st Med Insurance Plan
Credit Card	0	Vault(Check/Cash)	0
Deposit Amt.: (USD)	458	NDBA: (USD)	5828
Comment	oiuyfr		

Cancel **Revise**

Figure .. : Revise Payment Batch– Action

After Revising Payment Batch, User needs to click on “Revise” to confirm the changes & if User clicks on “Cancel” option for any changes made will be discarded.

- View: Selecting “View” Icon as shown below in Figure , will allow user to View the Payment Batch Details as shown below in Figure:.. Fields marked with (*) are mandatory.

**Figure .. : View Icon – Action.**

 A screenshot of a software window titled "View". The main title is "Payment Batch Details". Inside, there's a list of payment batch items. At the bottom left is a "Cancel" button, and at the bottom right is a "Print" button.

Payment Batch Details	
Ticket/Batch No.	10020608
Billing Month:	6/2023
Payment Type:	Ancillary Income
Insurance:	1st Med Insurance Plan
Money Source:	LockBox
Deposit Date:	06/08/2023
Deposit Amount (In USD):	\$458
NBOA (In USD):	\$5828
Other Income:	\$0
NDF/lys Ref:	\$0
ERA-Check #:	78676
Refund Chk:	\$0
Comment:	okuyr
Group/Doctor Name:	ProHealth
PH Doctor name:	Abbas, Abdul
Revenue Type:	
Agency Money:	\$0
OLD Prior AR:	\$0
CT Posted Total:	\$5653
+/- Posting:	\$0
Suspense Account:	\$0
Offset:	\$0

Figure .. : View Payment Details – Action

- Update: Selecting “Update” Icon as shown below in Figure , will allow user to Re-Update the Payment Batch information: Manually (In USD), Other Income (In USD), Electronically (In USD), Old Prior AR (In USD), CT Posted Total, Agency Money(In USD), +/- Posting (In USD), Suspense Account (In USD), Offset, CT Posted Date, Posted By & Posted On as shown below in Figure:.. Fields marked with (*) are mandatory.



Figure .. Edit Icon – Action.

Figure .. Re-Update – Action

After Re-Updating the Payment Batch information, User needs to click on “Update” to confirm the changes & if User clicks on “Cancel” option for any changes made will be discarded.

Excel Sheet Download

Selecting the “Excel” option will allow the user to download Excel sheet of the Payment Batching System details as shown below in Figure: .

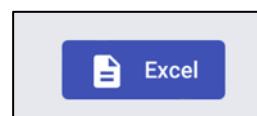


Figure no:

ID	Refund Chk	Other Minus	Other Plus	Other Type	Distribs Dr	Other Income Recalculated	C/R refund Crds	Received Dr	Suspense Acc/Recheck	Doctor	Payment Type	Retention Type	Money Drs/Drns	Discrepancy Dr	Insurance	Created By	Created On	Posted By	Posted On	Modified On
29	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	Ahmed, Abd. 1st Med. Insu.	Bhupender S 2023/04/08 2023/04/09			
30	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	Ahmed, Abd. AMPF2	Bhupender S 2023/04/08 2023/04/09			
31	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	Ahmed, Abd. 1st Med. Insu.	Bhupender S 2023/04/08 2023/04/09			
32	24	78	10	10	12	0	0	0	0	0	0	0	0	0	0	Ahmed, Abd. 1st Med. Insu.	Bhupender S 2023/04/08 2023/04/09			
33	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	Ahmed, Abd. 1st Med. Insu.	Bhupender S 2023/04/08 2023/04/09			
34	1	0	0	0	0	0	0	0	0	0	0	0	0	0	0	Ahmed, Abd. 1st Med. Insu.	Bhupender S 2023/04/08 2023/04/09			
35	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	Ahmed, Abd. 1st Med. Insu.	Bhupender S 2023/04/08 2023/04/09			
36	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	Ahmed, Abd. 1st Med. Insu.	Bhupender S 2023/04/08 2023/04/09			
37	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	Ahmed, Abd. 1st Med. Insu.	Bhupender S 2023/04/08 2023/04/09			
38	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	Ahmed, Abd. 1st Med. Insu.	Bhupender S 2023/04/08 2023/04/09			
39	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	Ahmed, Abd. 1st Med. Insu.	Bhupender S 2023/04/08 2023/04/09			
40	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	Ahmed, Abd. 1st Med. Insu.	Bhupender S 2023/04/08 2023/04/09			
41	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	Ahmed, Abd. 1st Med. Insu.	Bhupender S 2023/04/08 2023/04/09			
42	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	Ahmed, Abd. 1st Med. Insu.	Bhupender S 2023/04/08 2023/04/09			
43	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	Ahmed, Abd. 1st Med. Insu.	Bhupender S 2023/04/08 2023/04/09			
44	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	Ahmed, Abd. 1st Med. Insu.	Bhupender S 2023/04/08 2023/04/09			
45	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	Ahmed, Abd. 1st Med. Insu.	Bhupender S 2023/04/08 2023/04/09			
46	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	Ahmed, Abd. 1st Med. Insu.	Bhupender S 2023/04/08 2023/04/09			
47	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	Ahmed, Abd. 1st Med. Insu.	Bhupender S 2023/04/08 2023/04/09			
48	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	Ahmed, Abd. 1st Med. Insu.	Bhupender S 2023/04/08 2023/04/09			
49	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	Ahmed, Abd. 1st Med. Insu.	Bhupender S 2023/04/08 2023/04/09			
50	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	Ahmed, Abd. 1st Med. Insu.	Bhupender S 2023/04/08 2023/04/09			
51	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	Ahmed, Abd. 1st Med. Insu.	Bhupender S 2023/04/08 2023/04/09			
52	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	Ahmed, Abd. 1st Med. Insu.	Bhupender S 2023/04/08 2023/04/09			
53	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	Ahmed, Abd. 1st Med. Insu.	Bhupender S 2023/04/08 2023/04/09			
54	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	Ahmed, Abd. 1st Med. Insu.	Bhupender S 2023/04/08 2023/04/09			
55	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	Ahmed, Abd. 1st Med. Insu.	Bhupender S 2023/04/08 2023/04/09			
56	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	Ahmed, Abd. 1st Med. Insu.	Bhupender S 2023/04/08 2023/04/09			
57	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	Ahmed, Abd. 1st Med. Insu.	Bhupender S 2023/04/08 2023/04/09			
58	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	Ahmed, Abd. 1st Med. Insu.	Bhupender S 2023/04/08 2023/04/09			
59	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	Ahmed, Abd. 1st Med. Insu.	Bhupender S 2023/04/08 2023/04/09			
60	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	Ahmed, Abd. 1st Med. Insu.	Bhupender S 2023/04/08 2023/04/09			
61	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	Ahmed, Abd. 1st Med. Insu.	Bhupender S 2023/04/08 2023/04/09			
62	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	Ahmed, Abd. 1st Med. Insu.	Bhupender S 2023/04/08 2023/04/09			
63	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	Ahmed, Abd. 1st Med. Insu.	Bhupender S 2023/04/08 2023/04/09			
64	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	Ahmed, Abd. 1st Med. Insu.	Bhupender S 2023/04/08 2023/04/09			
65	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	Ahmed, Abd. 1st Med. Insu.	Bhupender S 2023/04/08 2023/04/09			
66	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	Ahmed, Abd. 1st Med. Insu.	Bhupender S 2023/04/08 2023/04/09			
67	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	Ahmed, Abd. 1st Med. Insu.	Bhupender S 2023/04/08 2023/04/09			
68	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	Ahmed, Abd. 1st Med. Insu.	Bhupender S 2023/04/08 2023/04/09			
69	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	Ahmed, Abd. 1st Med. Insu.	Bhupender S 2023/04/08 2023/04/09			
70	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	Ahmed, Abd. 1st Med. Insu.	Bhupender S 2023/04/08 2023/04/09			
71	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	Ahmed, Abd. 1st Med. Insu.	Bhupender S 2023/04/08 2023/04/09			
72	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	Ahmed, Abd. 1st Med. Insu.	Bhupender S 2023/04/08 2023/04/09			
73	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	Ahmed, Abd. 1st Med. Insu.	Bhupender S 2023/04/08 2023/04/09			
74	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	Ahmed, Abd. 1st Med. Insu.	Bhupender S 2023/04/08 2023/04/09			
75	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	Ahmed, Abd. 1st Med. Insu.	Bhupender S 2023/04/08 2023/04/09			
76	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	Ahmed, Abd. 1st Med. Insu.	Bhupender S 2023/04/08 2023/04/09			
77	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	Ahmed, Abd. 1st Med. Insu.	Bhupender S 2023/04/08 2023/04/09			
78	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	Ahmed, Abd. 1st Med. Insu.	Bhupender S 2023/04/08 2023/04/09			
79	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	Ahmed, Abd. 1st Med. Insu.	Bhupender S 2023/04/08 2023/04/09			
80	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	Ahmed, Abd. 1st Med. Insu.	Bhupender S 2023/04/08 2023/04/09			
81	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	Ahmed, Abd. 1st Med. Insu.	Bhupender S 2023/04/08 2023/04/09			
82	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	Ahmed, Abd. 1st Med. Insu.	Bhupender S 2023/04/08 2023/04/09			
83	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	Ahmed, Abd. 1st Med. Insu.	Bhupender S 2023/04/08 2023/04/09			
84	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	Ahmed, Abd. 1st Med. Insu.	Bhupender S 2023/04/08 2023/04/09			
85	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	Ahmed, Abd. 1st Med. Insu.	Bhupender S 2023/04/08 2023/04/09			
86	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	Ahmed, Abd. 1st Med. Insu.	Bhupender S 2023/04/08 2023/04/09			
87	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	Ahmed, Abd. 1st Med. Insu.	Bhupender S 2023/04/08 2023/04/09			
88	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	Ahmed, Abd. 1st Med. Insu.	Bhupender S 2023/04/08 2023/04/09			
89	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	Ahmed, Abd. 1st Med. Insu.	Bhupender S 2023/04/08 2023/04/09			
90	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	Ahmed, Abd. 1st Med. Insu.	Bhupender S 2023/04/08 2023/04/09			
91	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	Ahmed, Abd. 1st Med. Insu.	Bhupender S 2023/04/08 2023/04/09			
92	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	Ahmed, Abd. 1st Med. Insu.	Bhupender S 2023/04/08 2023/04/09			
93	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	Ahmed, Abd. 1st Med. Insu.	Bhupender S 2023/04/08 2023/04/09	</td		

Print Batches Download

Selecting the “Print Batches” option will allow the user to view the Print Batches Section and can also download the Print Batches sheet of Payment Batching System details as shown below in Figure: .



Figure no:

Argus Medical Management, LLC.			
PAYMENT BATCH TRACKING SYSTEM TICKET			
Ticket Number	10020608		
Billing Month	6/2023	Group/Doctor Name	ProHealth
Payment Type	Ancillary Income	PH Doctor Name	Abbasi, Abdul
Insurance	1st Med Insurance Plan	Revenue Type	
Money Source	LockBox	Refund Check	\$0
Deposit Date	06/08/2023	Agency Money	\$0
Deposit Amount	\$458	OLD Prior AR	\$0
NDBA	\$5828	CT Posted Total	\$5653
Other Income	\$0	+/- Posting	-\$5452201
NSF/Sys Ref	\$0	Suspense Account	\$0
ERA-Check #	78676	Offset	\$
Created By	Bhupender Singh	Created On	06/08/2023
Posted By	Abhishek Kaushal	CT Posted Date	06/08/2023
Comment:	oiuytr		

Figure no:

PBS List Download

Selecting the “PBS List” option will allow the user to view the PBS List Section and can also download the PBS List sheet of Charge Batching System details as shown below in Figure: .

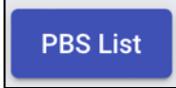


Figure no:

ARGUS MEDICAL MANAGEMENT, LLC. PAYMENT BATCH TRACKING SYSTEM TICKET													
Ticket #	Doctor Group Name	Billing Month	Deposit Date	Deposit Amount	NDA	CT Posted Amount	CT Post Date	Posted By	Payment Type	Insurance	ERA Check #	Comment	
30020008	ProHealth	4/2023	06/08/2023	458	7828	5653	06/08/2023	Akhilesh Kaushal	Ancillary Income	1st Med Insurance Plan	78076	oaype	
30020007	ProHealth	4/2023	06/08/2023	8978	8547	1553	06/08/2023	Akhilesh Kaushal	Admin Income	AAMP2	659832	gfbngqj	
30020006	ProHealth	4/2023	06/08/2023	455	450	54442	06/08/2023	Akhilesh Kaushal	Admin Income	AAMP2	6668	oaynew	
30020005	ProHealth	4/2023	06/08/2023	4985	2256	47999	06/08/2023	Bhupender Singh	Admin Income	1st Med Insurance Plan	000545		
30020004	ProHealth	4/2023	06/07/2023	49820	457	0			Admin Income	1st Med Insurance Plan	00154	test	
30020003	ProHealth	4/2023	06/08/2023	245	784	14550	06/08/2023	Bhupender Singh	Admin Income	1st Med Insurance Plan	123505484	testing remarks onlyyy	
30020002	ProHealth	5/2023	05/23/2023	45	4	32	06/08/2023	Bhupender Singh	Admin Income	1st Med Insurance Plan	547272	fgg	
30020001	Vascular and General Surgery Associates	5/2023	05/24/2023	333	0	0			Agency Income				
30020009	Vascular and General Surgery Associates	5/2023	05/23/2023	233	0	0			Bhupender Singh	Ancillary Income	Acclaim	21	test
30020008	ProHealth	5/2023	05/23/2023	500	70	950	05/22/2023	Bhupender Singh	Admin Income	1st Med Insurance Plan	36585	test	
30020007	ProHealth	5/2023	05/22/2023	500	0	525	05/22/2023	Bhupender Singh	Admin Income	1st Med Insurance Plan	453236	digitized	
30020006	ProHealth	5/2023	05/22/2023	4255	455	4612	05/22/2023	Bhupender Singh	Admin Income	1st Med Insurance Plan	562546	refire the	
30020005	ProHealth	5/2023	05/23/2023	4577	87	5879	05/22/2023	Bhupender Singh	Admin Income	1st Med Insurance Plan	53758	wrong	
30020004	ProHealth	5/2023	05/21/2023	4578	254	266	05/22/2023	Bhupender Singh	Admin Income	1st Med Insurance Plan	424377	testing	
30020003	ProHealth	5/2023	05/09/2023	222	0	222			Bhupender Singh	Agency Income	Acclaim	2	test
30020002	ProHealth	5/2023	05/02/2023	5228	1	21			Bhupender Singh	Acclaim	5	test	
30020001	ProHealth	5/2023	05/01/2023	0	0	0			Irene Ball	Admin Income	Affiliated Doctors of OC	2s	
30020008	ProHealth	5/2023	05/02/2023	0	0	0			Irene Ball	Admin Income	1st Med Insurance Plan	123	
30020007	ProHealth	5/2023	05/01/2023	300	0	0			Irene Ball	Admin Income	Access	2	test
30020006	San Bartolome, Mario	4/2023	04/28/2023	300	0	0			Irene Ball	Correspondence	Acclaim	3	test
30020005	San Bartolome, Mario	4/2023	04/20/2023	22	0	0			Irene Ball	CAP	Acceptable Health	2	test
30020004	Vascular and General Surgery Associates	4/2023	04/29/2023	0	0	0			Irene Ball	Agency Income	Access	33	test

Figure no:

PBS List (Doctor Wise) Download

Selecting the “PBS List (Doctor Wise)” option will allow the user to view the PBS List (Doctor Wise) Section and can also download the PBS List (Doctor Wise) sheet of Charge Batching System details as shown below in Figure: .

PBS List (Doctor Wise)
Figure no:

ARGUS MEDICAL MANAGEMENT, LLC. PAYMENT BATCH TRACKING SYSTEM TICKET													
Ticket #	Doctor Group Name	Billing Month	Deposit Date	Deposit Amount	NDA	CT Posted Amount	CT Post Date	Posted By	Payment Type	Insurance	ERA Check #	Comment	
30020008	ProHealth	4/2023	06/08/2023	458	7828	5653	06/08/2023	Akhilesh Kaushal	Ancillary Income	1st Med Insurance Plan	78076	oaype	
30020007	ProHealth	4/2023	06/08/2023	8978	8547	1553	06/08/2023	Akhilesh Kaushal	Admin Income	AAMP2	659832	gfbngqj	
30020006	ProHealth	4/2023	06/08/2023	455	450	54442	06/08/2023	Akhilesh Kaushal	Admin Income	AAMP2	6668	oaynew	
30020005	ProHealth	4/2023	06/08/2023	4985	2256	47999	06/08/2023	Bhupender Singh	Admin Income	1st Med Insurance Plan	000545		
30020004	ProHealth	4/2023	06/07/2023	49820	457	0			Admin Income	1st Med Insurance Plan	00154	test	
30020003	ProHealth	4/2023	06/08/2023	245	784	14550	06/08/2023	Bhupender Singh	Admin Income	1st Med Insurance Plan	123505484	testing remarks onlyyy	
30020002	ProHealth	5/2023	05/23/2023	45	4	32	06/08/2023	Bhupender Singh	Admin Income	1st Med Insurance Plan	547272	fgg	
30020001	Vascular and General Surgery Associates	5/2023	05/24/2023	333	0	0			Agency Income				
30020009	Vascular and General Surgery Associates	5/2023	05/23/2023	233	0	0			Bhupender Singh	Ancillary Income	Acclaim	21	test
30020008	ProHealth	5/2023	05/23/2023	500	70	950	05/22/2023	Bhupender Singh	Admin Income	1st Med Insurance Plan	36585	test	
30020007	ProHealth	5/2023	05/22/2023	500	0	525	05/22/2023	Bhupender Singh	Admin Income	1st Med Insurance Plan	453236	digitized	
30020006	ProHealth	5/2023	05/22/2023	4255	455	4612	05/22/2023	Bhupender Singh	Admin Income	1st Med Insurance Plan	562546	refire the	
30020005	ProHealth	5/2023	05/21/2023	4577	87	5879	05/22/2023	Bhupender Singh	Admin Income	1st Med Insurance Plan	53758	wrong	
30020004	ProHealth	5/2023	05/20/2023	4578	254	266	05/22/2023	Bhupender Singh	Admin Income	1st Med Insurance Plan	424377	testing	
30020003	ProHealth	5/2023	05/09/2023	222	0	222			Bhupender Singh	Agency Income	Acclaim	2	test
30020002	ProHealth	5/2023	05/02/2023	5228	1	21			Bhupender Singh	Acclaim	5	test	
30020001	ProHealth	5/2023	05/01/2023	0	0	0			Irene Ball	Admin Income	Affiliated Doctors of OC	2s	
30020008	ProHealth	5/2023	05/02/2023	0	0	0			Irene Ball	Admin Income	1st Med Insurance Plan	123	
30020007	ProHealth	5/2023	05/01/2023	300	0	0			Irene Ball	Admin Income	Access	2	test
30020006	San Bartolome, Mario	4/2023	04/28/2023	300	0	0			Irene Ball	Correspondence	Acclaim	3	test
30020005	San Bartolome, Mario	4/2023	04/20/2023	22	0	0			Irene Ball	CAP	Acceptable Health	2	test
30020004	Vascular and General Surgery Associates	4/2023	04/29/2023	0	0	0			Irene Ball	Agency Income	Access	33	test

Figure no:

4.1.23. Payment Productivity

After selecting the “Payment Productivity” option from the Left Navigation Bar, the system will allow the admin to select from the following 1 of 3 Sub-section as mentioned:

ERA List

After selecting the “ERA List” option from the Left Navigation Bar (Payment Productivity > ERA List > ERA Productivity). User will be able to view the ERA Productivity Information in the “Coding Productivity” menu as shown in below figure: . This page will appear from left navigation bar Payment Productivity.

Action	Batch/Ticket#	Dr. Office	Payment type	CK Number	Posted Amt.	Elec. Post Amt.	Suspense Amt.	Agency Money
<input checked="" type="checkbox"/>	10020602	ProHealth	ERA	547272	\$32	\$20	\$2	23
<input checked="" type="checkbox"/>	10020598	ProHealth	ERA	36595	\$950	\$250	\$30	20
<input checked="" type="checkbox"/>	10020589	ProHealth	ERA	26	\$0	\$0	\$0	0
<input checked="" type="checkbox"/>	10020598	ProHealth	ERA	36595	\$950	\$250	\$30	20
<input checked="" type="checkbox"/>	10020598	ProHealth	ERA	36595	\$950	\$250	\$30	20
<input checked="" type="checkbox"/>	10020597	ProHealth	ERA	453236	\$525	\$25	\$40	20
<input checked="" type="checkbox"/>	10020596	ProHealth	ERA	563546	\$4612	\$25	\$2	5
<input checked="" type="checkbox"/>	10020595	ProHealth	ERA	53758	\$5879	\$424	\$10	58

Figure no:

Also, User can access the Payment Productivity by selecting “ERA List” Link from the “Payments Team Productivity” menu from Dashboard, User will be redirected to the “ERA Productivity” (Reference- Page: 94)

CAP List

After selecting the “CAP List” option from the Left Navigation Bar (Payment Productivity > CAP List > CAP Productivity). User will be able to view the CAP Productivity Information in the “CAP Productivity” menu as shown in below figure: . This page will appear from left navigation bar Payment Productivity.

Action	Batch/Ticket#	Dr. Office	Payment type	CK Number	Posted Amt.	Elec. Post Amt.	Suspense Amt.	Agency Money
✓	10020599	Vascular and General Surgery Associates	CAP	21	\$0	\$0	\$0	0
✓	10020590	ProHealth	CAP	5	\$21	\$1	\$22	
✓	10020556	Bonadia, Meenal	CAP	334	\$3	\$2	\$0	1
✓	10020518	American Pacific Med Grp	CAP	5856562758	\$93	\$48	\$0	40
✓	10020521	NAFMS (Sugarland)	CAP	2332	\$0	\$0	\$0	0
✓	1771757	NAFMG (Whitmer)	CAP	876847839	\$2333	\$0	\$1	1
✓	1004665	Young, Handing	CAP		\$1988	\$0	\$0	0

Figure no:

Also, User can access the CAP Productivity by selecting “CAP List” Link from the “Payments Team Productivity” menu from Dashboard, User will be redirected to the “CAP Productivity” (Reference- Page: 104)

Non-ERA List

After selecting the “Non-ERA List” option from the Left Navigation Bar (Payment Productivity > Non-ERA List > Non-ERA Productivity). User will be able to view the Non-ERA Productivity Information in the “Non-ERA Productivity” menu as shown in below figure: . This page will appear from left navigation bar Payment Productivity.

Action	Batch/Ticket#	Dr. Office	Payment type	CK Number	Posted Amt.	Els. Post Amt.	Suspense Amt.	Agency Money
	10020591	ProHealth	Non-ERA	2	\$222	\$222	\$0	0
	10020569	AIM Psych	Non-ERA	8946564	\$900	\$400	\$4	2
	10020521	NAFMS (Sugarland)	Non-ERA	2332	\$0	\$0	\$0	0
	1771757	NAFMS (Whitmer)	Non-ERA	87684789	\$2333	\$0	\$1	1
	1002920	Tarflow, Gardner	Non-ERA		\$1892.6	\$0	\$0	0
	1002584	Farsad, Moshe	Non-ERA		\$48.2	\$0	\$0	0
	1002475	Mehta, Manan	Non-ERA		\$0	\$0	\$0	0
	1003458	ProHealth	Non-ERA		\$1379.68	\$0	\$0	0

Figure no:

Also, User can access the Non-ERA Productivity by selecting “Non-ERA List” Link from the “Payments Team Productivity” menu from Dashboard, User will be redirected to the “Non-ERA Productivity” (Reference- Page: 104)

4.1.24. Cashlog Report

4.1.24.1. Generate Cashlog Report

After selecting the “Cashlog Report” option from the Left Navigation Bar, the system will allow the admin to view the Cashlog Report Information in the “Generate Cashlog Report” menu as shown in below figure: . This page will appear from left navigation bar (Cashlog Report -> Generate Cashlog Report).

Figure no:

Generate Cashlog Report will have following filter or Report Generation feature:

- Check Box: User will be able to select any head to generate report from the following List:
 - Journal Entries Management Fee
 - Journal Entries Summary
 - Detailed Journal Entries
 - Detailed Journal Entries with Management Fee
 - Daily Payment Receipt Log
- Month: User will be able to select “Month” from the drop-down option.
- Year: User will be able to select “Year” from the drop-down option.

Journal Entries Management Fee

After selecting “Journal Entries Management Fee” as shown below in figure: . from the “Generate Cashlog Report” menu, User needs to Click on the “Generate Report” button to generate the “Journal Entries Management Fee” Report and will be redirected to the “Report” Page as shown below in Figure: . Where user will be able to view the Generated Report.

Figure: 5.1 Generate Cashlog Report

The screenshot shows a report titled "ARGUS MEDICAL MANAGEMENT, LLC. JOURNAL ENTRIES MANAGEMENT FEE FOR THE MONTH OF Jun - 2023". The table has columns: Revenue Sub-Account, Event Center Number, Transaction Description, Debit, and Credit. The data includes Management Fee Admin, Admin, Management Fee E.O. - Payment, Management Fee Accounting, and Management Fee Operation. A total row at the bottom shows a debit of 10000 and a credit of 10000. Below the table, there are fields for Description, To Report "Other Income" Revenue for Visit and Labfee, Preparer, Date, Approved By, Date, Head, and Date. Buttons for Export and Print are at the top right.

Revenue Sub-Account	Event Center Number	Transaction Description	Debit	Credit	
1000	4002	Management Fee Admin, Admin			
3000	8002	Management Fee E.O. - Payment			
3000	8012	Management Fee Accounting			
3000	8022	Management Fee Operation			
		Total:	10000	10000	
Description	To Report "Other Income" Revenue for Visit and Labfee				
Prepared By	Date	Approved By	Date	Head	Date

Figure: 5.1 Journal Entries Management Fee Report

Also, User will be able to “Export” & “Print” the Generated report by clicking on the provided Export & Print link in top right corner of report page as shown above in Figure: .

And clicking on the “Back Arrow” will allow user to go back to the “Generate Cashlog Report” Page.

Journal Entries Summary

After selecting “Journal Entries Summary” as shown below in figure: . from the “Generate Cashlog Report” menu, User needs to Click on the “Generate Report” button to generate the “Journal Entries Summary” Report and will be redirected to the “Report” Page as shown below in Figure: . Where user will be able to view the Generated Report.

The screenshot shows the "Generate Cashlog Report" section of the application. It includes a list of report types: Journal Entries Management Fee, Journal Entries Summary (which is selected and highlighted in red), Detailed Journal Entries, Detailed Journal Entries With Management Fee, and Daily Payment Receipt Log. Below the list are dropdown menus for Month (set to Jun) and Year (set to 2023). A large red-bordered "GENERATE REPORT" button is at the bottom. The left sidebar contains a navigation menu with items like Dashboard, Charge Batching System, etc.

Figure: 5.1 Generate Cashlog Report**Figure: 5.1 Journal Entries Summary Report**

Also, User will be able to “Export” & “Print” the Generated report by clicking on the provided Export & Print link in top right corner of report page as shown above in Figure: .

And clicking on the “Back Arrow” will allow user to go back to the “Generate Cashlog Report” Page.

Detailed Journal Entries

After selecting “Detailed Journal Entries” as shown below in figure: . from the “Generate Cashlog Report” menu, User needs to Click on the “Generate Report” button to generate the “Detailed Journal Entries” Report and will be redirected to the “Report” Page as shown below in Figure: . Where user will be able to view the Generated Report.

Also, User will have an extra option for “Detailed Journal Entries” i.e., “Show Ticket Number in Report” Checkbox, which will allow user to Add Ticket Number in the report generation.

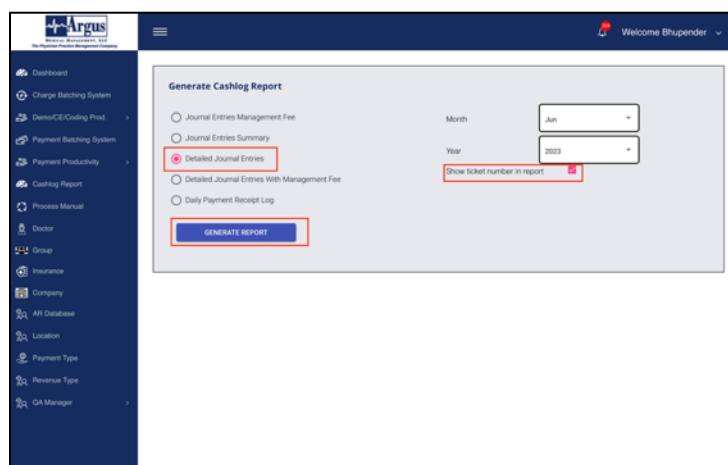


Figure: 5.1 Generate Cashlog Report

Account	Case Center Number	Case Center Name	Original Date	Posting Date	Accounting Source	Revenue Type	Total
10000000	4001	Armen, Armen	0000000000000000	0000000000000000	PTT	PMT Plus Mgmt	\$0.00
10000000	4001	Armen, Armen	0000000000000000	0000000000000000	London	PMT Plus Mgmt	\$0.00
10000000	4001	Armen, Armen	0000000000000000	0000000000000000	PTT	PMT Plus Mgmt	\$0.00
10000000	4001	Armen, Armen	0000000000000000	0000000000000000	PTT	PMT Plus Mgmt	\$0.00
10000000	4001	Armen, Armen	0000000000000000	0000000000000000	PTT	PMT Plus Mgmt	\$0.00
10000000	4001	Armen, Armen	0000000000000000	0000000000000000	PTT	PMT Plus Mgmt	\$0.00
Department Name Sub Header, Amend							\$0.00
Grand Total:							\$0.00

Figure: 5.1 Journal Entries Summary Report

Also, User will be able to “Export” & “Print” the Generated report by clicking on the provided Export & Print link in top right corner of report page as shown above in Figure: .

And clicking on the “Back Arrow” will allow user to go back to the “Generate Cashlog Report” Page.

Detailed Journal Entries with Management Fee

After selecting “Detailed Journal Entries with Management Fee” as shown below in figure: . from the “Generate Cashlog Report” menu, User needs to Click on the “Generate Report” button to generate the “Detailed Journal Entries with Management Fee” Report and will be redirected to the “Report” Page as shown below in Figure: . Where user will be able to view the Generated Report.

Also, User will have an extra option for “Detailed Journal Entries with Management Fee” i.e., “Show Ticket Number in Report” Checkbox, which will allow user to Add Ticket Number in the report generation.

The screenshot shows the 'Generate Cashlog Report' interface. On the left sidebar, there are various menu items like Dashboard, Charge Batching System, Demo/CIE/Coding Prod, Payment Batching System, Payment Productivity, Coding Report, Process Manual, Doctor, Group, Insurance, Company, AR Database, Location, Payment Type, Revenue Type, and QA Manager. The 'Detailed Journal Entries with Management Fee' option under the 'Generate Cashlog Report' section is selected, indicated by a red box around the radio button. To the right, there are dropdown menus for 'Month' (set to 'Jan') and 'Year' (set to '2023'). Below these dropdowns is a checkbox labeled 'Show ticket number in report' with a red box around it. At the bottom is a large blue 'GENERATE REPORT' button.

Figure: 5.1 Generate Cashlog Report

The screenshot shows a report titled "ARGUS MEDICAL MANAGEMENT, LLC. DETAILED JOURNAL ENTRIES WITH MANAGEMENT FEES FOR THE MONTH OF Jun - 2023". The table has columns for Batch#, Cost Center Number, Cost Center Name, Deposit Date, Month, Money Source, Revenue sub-revenue, Revenue Type, Total, Revenue %, and Mgmt. Fee. The data includes multiple entries for "Ahmed, Abdul" with various transaction types like EFT and Lodger.

Batch#	Cost Center Number	Cost Center Name	Deposit Date	Month	Money Source	Revenue sub-revenue	Revenue Type	Total	Revenue %	Mgmt. Fee
10000001	4801	Ahmed, Abdul	06/08/2023	06/2023	EFT		PHR's First Mgmt.	\$829	0	
10000004	4801	Ahmed, Abdul	06/07/2023	06/2023	Lodger		PHR's First Mgmt.	\$46277	0	
10000005	4801	Ahmed, Abdul	06/08/2023	06/2023	Lodger		PHR's First Mgmt.	\$8841	0	
10000006	4801	Ahmed, Abdul	06/08/2023	06/2023	EFT		PHR's First Mgmt.	\$846	0	
10000007	4801	Ahmed, Abdul	06/08/2023	06/2023	EFT		PHR's Cash Due Entry	\$17126	0	
Department Name Sub: Ahmed, Abdul								ST1217		
Total in Hand										
Management Fees										
Grand Total:										

Figure: 5.1 Journal Entries Summary Report

Also, User will be able to “Export” & “Print” the Generated report by clicking on the provided Export & Print link in top right corner of report page as shown above in Figure: .

And clicking on the “Back Arrow” will allow user to go back to the “Generate Cashlog Report” Page.

Daily Payment Receipt Log

After selecting “Daily Payment Receipt Log” as shown below in figure: . from the “Generate Cashlog Report” menu, User needs to Click on the “Generate Report” button to generate the “Daily Payment Receipt Log” Report and will be redirected to the “Report” Page as shown below in Figure: . Where user will be able to view the Generated Report.

Also, User will have an extra option for “Daily Payment Receipt Log” i.e., “Deposit Date (From) & Deposit Date (To)”, which will allow user to Add desired Deposit Date Range in the report generation.

The screenshot shows the "Generate Cashlog Report" section with the "Daily Payment Receipt Log" option selected. The form includes fields for Month (Jun), Year (2023), Deposit Date (From) (6/14/2023), and Deposit Date (To) (6/14/2023). A "GENERATE REPORT" button is at the bottom.

Figure: 5.1 Generate Cashlog Report

Provider	Deposit Date	Revenue Type	Deposit Total	Last Rec.	VAULT	Credit Card	Interchecks	ER
Alice, Adal	06/08/2023	Phar-Rx Mgmt	\$629					\$629
Alice, Adal	06/07/2023	Phar-Rx Mgmt	\$40277	\$40277				
Alice, Adal	06/08/2023	Phar-Rx Mgmt	\$641	\$641				
Alice, Adal	06/08/2023	Phar-Rx Mgmt	\$605					\$605
Alice, Adal	06/08/2023	Phar-CASH Data Entry	\$17525					\$17525
Prashant	06/08/2023	Patient Collection	\$6296	\$6296				
		TOTAL	\$76443	\$64454	\$0	\$0	\$0	\$11209

Figure: 5.1 Journal Entries Summary Report

Also, User will be able to “Export” & “Print” the Generated report by clicking on the provided Export & Print link in top right corner of report page as shown above in Figure: .

And clicking on the “Back Arrow” will allow user to go back to the “Generate Cashlog Report” Page.

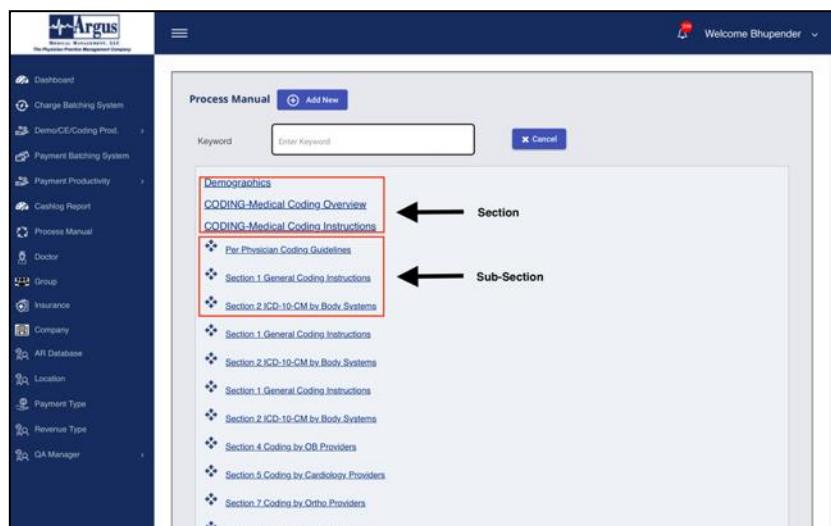
4.1.25. Process Manual

After selecting the “Process Manual” option from the Left Navigation Bar, the system will allow the admin to view the Process Manual Information in the “Process Manual” menu as shown in below figure: . This page will appear from left navigation bar Process Manual.

Process Manual will have all the Process Manual links in the section.

Figure no:

Process Manual menu will display the Main sections and their Sub-Section as shown below in figure: .

**Figure no:**

Process Manual will have the following search functionality:

- Keyword: User will be able to search Process Manual using “Keyword” input.

Also, on click on the click of “Cancel” button will discard all the changes.

Add Section

User will be able to “Add Section” to the selected Process manual by clicking on the “Add New” button from the top of the Process Manual. After selecting Add section user will be redirected to the “Add Process Manual” pop-up menu as shown below in Figure:.

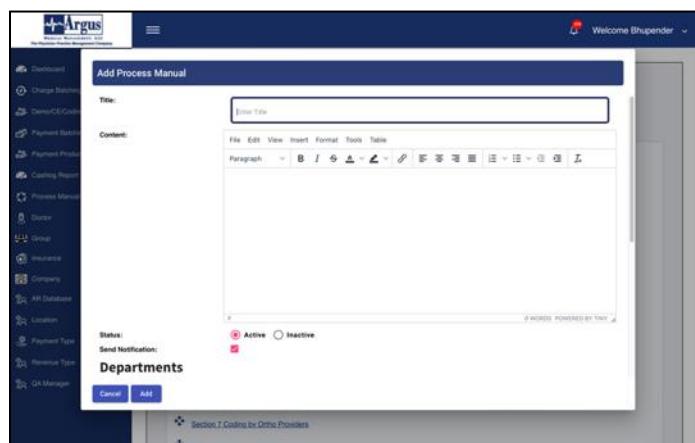


Figure no:

User will also be required to select the Departments from the listed checkbox options as shown below in figure:.

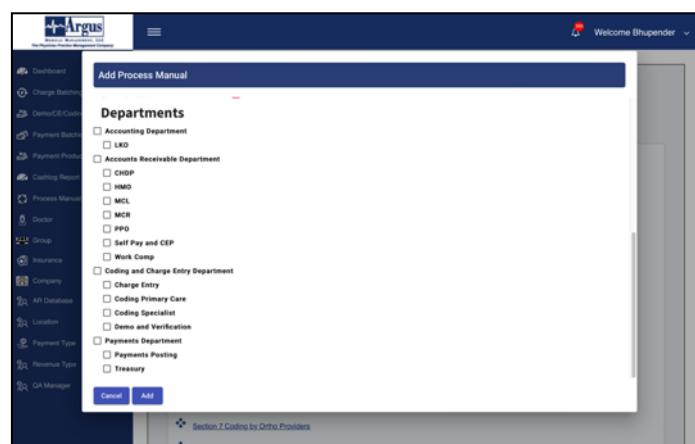


Figure no:

After filling out all the information User needs to click on “Add” button to confirm the changes and clicking on “Cancel” will discard all the changes.

User will be able to select any desired process manual, After selecting the Process Manual user will be redirected to that particular detailed page as shown below in Figure:.

Figure no:**Add Sub-Section**

User will be able to “Add Sub-Section” to the selected Process manual by clicking on the “Add Sub Section” button from the top right corner of the Process Manual. After selecting Add Sub-section user will be redirected to the “Add Sub Section Process Manual”

Figure no:

After filling out all the information User needs to click on “Add” button to confirm the changes and clicking on “Cancel” will discard all the changes.

User Manual will have the following options available at the end of selected manual (As shown below in Figure: .)

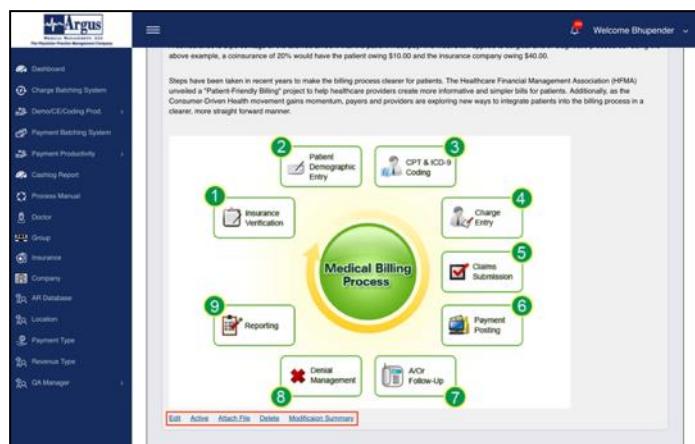


Figure no:

- Edit: User will be able to click on “Edit” button as shown below in figure: , where user will be able to edit the following information: Title, Content, Status(Active/InActive) checkbox, Send Notification Checkbox & Department Lists – Checkbox as shown below in figure: ..



Figure no:

Figure no:

After filling out all the information User needs to click on “Update” button to confirm the changes and clicking on “Cancel” will discard all the changes.

- Active/Inactive Status: User will be able to click on “Active/Inactive” button as shown below in figure: , where user will be able to change the status from Active to Inactive or vice-versa just with one click.

**Figure no:**

- Attach File: User will be able to click on “Attach File” button as shown below in figure: , where user will be able to upload file which they want to add in the User Manual as shown below in figure: .

User will be able to upload following file formats (File size should not exceed 5 MB):

- PDF
- MS Word
- Excel
- PPT
- JPEG
- JPG

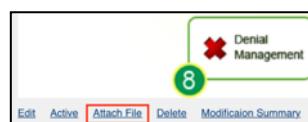
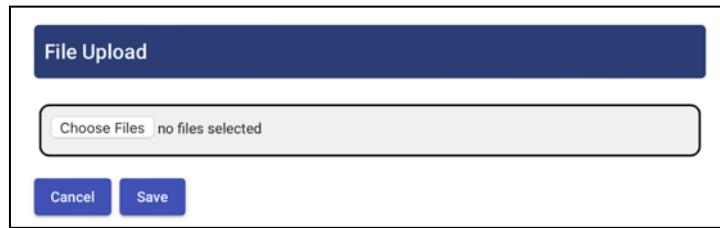


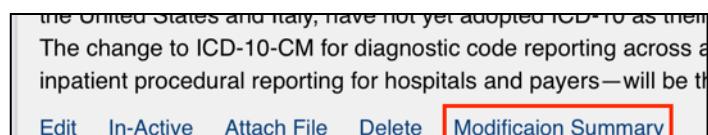
Figure no:**Figure no:**

After uploading the file out all the information User needs to click on “Save” button to confirm the changes and clicking on “Cancel” will discard all the changes.

- Delete: User will be able to click on “Delete” button as shown below in figure: , where user will be able to delete the selected file which they wish to delete.

**Figure no:**

- Modification Summary: User will be able to click on “Modification Summary” button as shown below in figure: , where user will be able to view the list of Modifications made to the User Manual as shown below in figure: ..

**Figure no:**

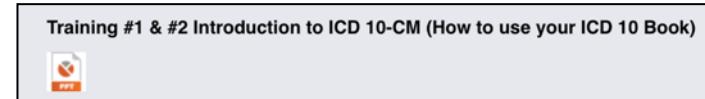
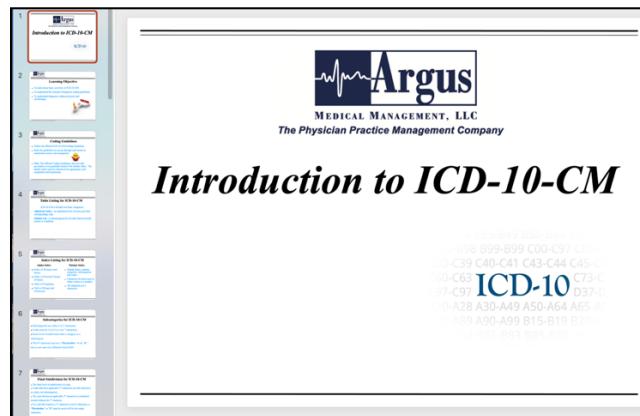
Modification Summary	
Sub-Section 'Main Sub- Process Manual 2' has been deleted in this process manual.	
Modified By:	Sunil Verma, On: Mar 9, 2016, 8:00:08 AM
Updated	Modified By: Jasbir Singh, On: Mar 17, 2016, 7:40:42 AM
Updated	Modified By: Jasbir Singh, On: Mar 18, 2016, 4:06:42 AM
Updated	Modified By: Jasbir Singh, On: Mar 25, 2016, 9:24:16 PM
Updated	Modified By: Jasbir Singh, On: Mar 25, 2016, 9:29:21 PM
Sub-Section 'MCR - page 1' has been deleted in this process manual.	
Modified By:	Ravi 2 Kumar, On: Mar 28, 2016, 8:28:12 PM

Figure no:

Also, after making any change, update or modification in the Process Manual, User will receive a notification regarding Process Manual update as shown below in the Figure:

**Figure no:**

- Download PPT Manual: User will be able to click on “PPT” icon as shown below in figure: , where user will be able to download the User Manual for that particular Section or Sub-section as shown below in figure: ..

**Figure no:****Figure no:**

4.1.26. QA Manager

4.1.26.1. QA Worksheet

After selecting the “QA Manager” option from the Left Navigation Bar, the system will allow the admin to select from the following 1 of 3 Sub-section as mentioned:

Add QA Worksheet

User will be able to “Add QA Worksheet” to the selected Process manual by clicking on the “Add New” button from the top of the QA Worksheet List. After selecting Add New user will be redirected to the “Add QA Worksheet” pop-up menu as shown below in Figure:.

User will be able to select the Departments and Sub-Department drop-down menu.

After selecting “**Coding and Charge Entry Department**” from “Department” drop down menu

Figure no:

Only on the click of “General” checkbox, the “General Percentage” will be visible or on the click of “By Staff” or “By Doctor” it will be hidden.

After filling all the necessary details user need to click on “Save as QA Worksheet” to save the changes and on the click of “Cancel” all the changes made will be discarded.

After selecting “Payments Department” from “Department” drop-down menu.

The screenshot shows the 'Add QA Worksheet' interface. At the top, it says 'Add QA Worksheet'. Below that, there are several input fields:

- Department***: A dropdown menu showing 'Payments Department'.
- Billing Month***: A dropdown menu showing 'Select Billing Month'.
- Prod. Date From**: A date input field showing 'MM/DD/YYYY' with a calendar icon.
- Type***: Three radio buttons: 'General' (unchecked), 'By Staff' (checked), and 'By Doctor' (unchecked).
- Sub Department**: A dropdown menu showing 'Select Sub Department'.
- Billing Year***: A dropdown menu showing 'Select Billing Year'.
- Prod. Date To**: A date input field showing 'MM/DD/YYYY' with a calendar icon.
- Worksheet Name***: An input field with placeholder text 'Enter Worksheet Name'.

At the bottom left are 'Cancel' and 'Save QA Worksheet' buttons.

Figure no:

Only on the click of “General” checkbox, the “General Percentage” will be visible or on the click of “By Staff” or “By Doctor” it will be hidden.

After filling all the necessary details user need to click on “Save as QA Worksheet” to save the changes and on the click of “Cancel” all the changes made will be discarded.

After selecting “Accounts Receivable Department” from “Department” drop down menu.

The screenshot shows the 'Add QA Worksheet' interface. At the top, it says 'Add QA Worksheet'. Below that, there are several input fields:

- Department***: A dropdown menu showing 'Accounts Receivable Depart...'.
- AR Status Code**: A dropdown menu showing 'Select Status Code'.
- Billing Month***: A dropdown menu showing 'Select Billing Month'.
- Prod. Date From**: A date input field showing 'MM/DD/YYYY' with a calendar icon.
- Type***: Three radio buttons: 'General' (unchecked), 'By Staff' (unchecked), and 'By Doctor' (checked).
- Sub Department**: A dropdown menu showing 'Select Sub Department'.
- Billing Year***: A dropdown menu showing 'Select Billing Year'.
- Prod. Date To**: A date input field showing 'MM/DD/YYYY' with a calendar icon.
- Worksheet Name***: An input field with placeholder text 'Enter Worksheet Name'.

At the bottom left are 'Cancel' and 'Save QA Worksheet' buttons.

Figure no:

Only on the click of “General” checkbox, the “General Percentage” will be visible or on the click of “By Staff” or “By Doctor” it will be hidden.

After filling all the necessary details user need to click on “Save as QA Worksheet” to save the changes and on the click of “Cancel” all the changes made will be discarded.

QA Work Sheet

After selecting the “QA Work Sheet” option from the Left Navigation Bar (QA Manager > QA Worksheet > QA Worksheet List). User will be able to view the QA Worksheet List Information in the “QA Worksheet” menu as shown in below figure: . This page will appear from left navigation bar QA Manage.

The screenshot shows a web-based application interface for managing QA Worksheets. At the top, there is a header with the title "QA Worksheet List" and a "Add New" button. Below the header, there are several filter options: "Department" (dropdown), "Sub Department" (dropdown), "Keyword" (text input), "Status" (dropdown), "Created From Date" (date range input), "Created By" (dropdown), and "Search" and "Cancel" buttons. Below the filters is a table containing a list of QA worksheets. The table has columns for Action, Name, Month & Year, From & To Date, Department, Status, Created By, Created On, Modified By, and Modified On. Each row in the table represents a different worksheet entry, with icons for edit and delete actions.

Action	Name	Month & Year	From & To Date	Department	Status	Created By	Created On	Modified By	Modified On
	test - Coding	5/2023	05/04/2023 - 05/18/2023	Coding and Charge Entry Department	Pending	tausif alam	07/21/2023		
	test Coding neww1	3/2023	03/01/2023 - 03/30/2023	Coding and Charge Entry Department	Pending	tausif alam	07/21/2023	3336	07/21/2023
	test by user AR	3/2023	03/01/2023 - 03/29/2023	Accounts Receivable Department	In Progress	tausif alam	07/20/2023		
	test Feb AR worksheet	2/2023	02/01/2023 - 02/28/2023	Accounts Receivable Department	In Progress	tausif alam	07/20/2023		
	Testtt	1/2014	01/06/2014 - 01/06/2014	Coding and Charge Entry Department	Pending	Bhupender Singh	07/19/2023	3	07/19/2023
	Satwinder 23	1/2014	01/06/2014 - 01/06/2014	Coding and Charge Entry Department	In Progress	Bhupender Singh	07/17/2023		
	test coding -17-Jul-23	3/2023	03/01/2023 - 03/31/2023	Coding and Charge Entry Department	In Progress	vishal user ARD	07/17/2023		
	dsds	5/2023	05/03/2023 - 05/05/2023	Coding and Charge Entry Department	In Progress	Bhupender Singh	07/14/2023		

Figure no:

QA Worksheet List will have the following filter options:

- Department: User will be able to Select the department from the “Department” Drop-down list.
- Sub-Department: User will be able to Select the Sub-Department from the “Sub-Department” Drop-down list.
- Keyword: User will be able to input the keyword into “keyword” option.
- Status: User will be able to Select the Status from the “Status” Drop-down list.

- Created Date From & To: User will be able to Select the Date range from the “Created Date From & To” option.
- Created By: User will be able to Select the name from the “Created By” Drop-down list.

User can select desired Search options as required. It is not Mandatory to fill all the Options provided.

After selecting the options, User will click on the “Search” button to search that task as per the Inputs provided. If the User clicks on the “Cancel” button, the selected Filters will be removed instantly.

QA Worksheet List will have the following columns:

- Name: User will be able to view the “Name” under this column.
- Month & Year: User will be able to view the “Month & Year” under this column.
- From & To: User will be able to view the “From & To” under this column.
- Department: User will be able to view the “Department” under this column.
- Status: User will be able to view the “Status” under this column.
- Created By: User will be able to view the “Created By” name under this column.
- Created On: User will be able to view the “Created On” Date under this column.
- Action: The Action menu will provide following functionalities:
 - Edit QA: Selecting “Edit” Icon as shown below in Figure , will allow user to Edit the information: Department, Sub-Department, Billing month,

Billing Year, Print Date, Print Date From, Type, Worksheet Name, General Percentage. as shown below in Figure:.. Fields marked with (*) are mandatory.

“General Percentage” can only be updated when “General” from “Type” is selected.

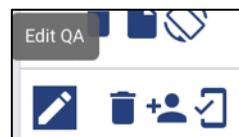


Figure ..: Edit QA Icon – Action.

A screenshot of a web-based form titled "Update QA Worksheet". The form fields include: Department (dropdown), Sub Department (dropdown), Billing Month (dropdown, showing May), Billing Year (dropdown, showing 2023), Prod. Date From (date input, MM/DD/YYYY), Prod. Date To (date input, MM/DD/YYYY), Type (radio buttons: General (selected) and By Doctor), Worksheet Name (text input, showing 111), General Percentage (text input, showing 50%), and two buttons at the bottom: Cancel and Save QA Worksheet.

Figure ..: Update QA Worksheet– Action

After Updating QA worksheet, User needs to click on “Save as QA worksheet” to confirm the changes & if User clicks on “Cancel” option for any changes made will be discarded.

If User selects “By Staff” and then click on the “Save as QA worksheet” and QA Worksheet is successfully Saved button, User will be redirected to “Add Staff To QA worksheet” as shown below in Figure:., Where user will be able to Add staff through the “Select Staff” drop-down menu and mentioning “Staff Percentage” and then click on “Add Staff” to Add the staff to that QA Worksheet.

Figure .: Add Staff to QA worksheet – Action

On the click of “Add Staff”, selected User’s information like Name, Percentage, Remarks will be displayed under the columns, Plus a Delete Icon to delete the staff as shown below in figure:..

Figure .: Add Staff to QA worksheet – Action

- View: Selecting “View QA Worksheet Users” Icon as shown below in Figure , will allow user to QA Worksheet Users Details as shown below in Figure:.. .



Figure .: View Icon – Action.

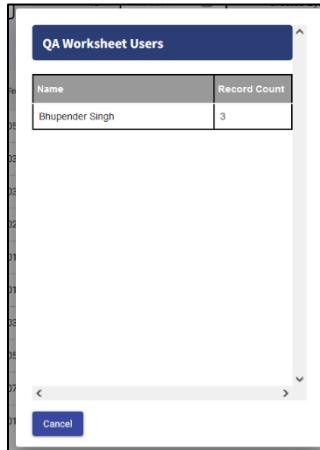


Figure .: QA Worksheet Users – Action

- Delete: Selecting “Delete QA” Icon as shown below in Figure , will allow user to delete the selected QA Worksheet.

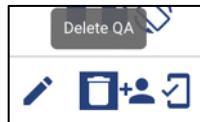


Figure .: Delete Icon – Action.

- Add Staff: Selecting “Add Staff” Icon as shown below in Figure , User will be redirected to “Add Staff To QA worksheet” as shown above in Figure: ., under the “Edit QA Worksheet” section. Where user will be able to Add staff through the “Select Staff” drop-down menu and mentioning “Staff Percentage” and then click on “Add Staff” to Add the staff to that QA Worksheet.

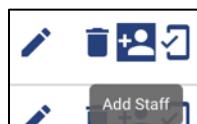


Figure .: Add Staff Icon – Action.

- Execute Worksheet: Selecting “Execute Worksheet” Icon as shown below in Figure , will allow user to Execute the selected QA Worksheet.

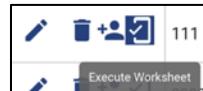


Figure .: Execute Worksheet – Action.

- Continue Worksheet: Selecting “Continue Worksheet” Icon as shown below in Figure , will allow user to view Continue Worksheet Details as shown below in Figure:..

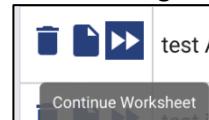


Figure .: Continue Worksheet – Action.

AR QA Worksheet										
Sort By:	Qwrtly	By Date	By Order							<input type="checkbox"/> Show all hidden rows
Posted Date	DE Person	ODS	Dataset	PT Acct#	CPT Codes	Remarks	Errors	Action		
08/02/2023	Vishal user ARD	08/02/2023	Abrav, Alexander MD	5151	945	Remarks	0			
08/02/2023	Uttamprakash Singh	08/02/2023	Gearon, Lili O/The Surgical & Medical Group A Ptlngp	119993	11	Remarks	0			
08/02/2023	Vishal user ARD	08/02/2023	Gearon, Lili O/The Surgical & Medical Group A Ptlngp	122234	2	Remarks	0			
08/02/2023	Uttamprakash Singh	08/02/2023	Apv, Rose MD / A Professional Medical Corp	122161	2	Remarks	0			
08/08/2023	Vishal user ARD	08/08/2023	American Pacific Medical Group Inc	482460X	2	Remarks	0			
08/08/2023	Vishal user ARD	08/08/2023	Anamed Dermatology Care Center	212211	2	Remarks	0			

Figure .: Continue AR QA Worksheet Detail – Action

Coding and Charge QA Worksheet										
Sort By:	Qwrtly	By Date	By Order							
Sr. no.	Scan Date	Posted Date	DE Person	Batch No.	Physician Group	QCed Accounts	Errors	Action		
14599	12/20/2019	01/06/2019	Mengar Ram Verma	1000538	MD Elisa Rodriguez	1				
15295	12/03/2019	01/06/2019	Mengar Ram Verma	1000629	MD Elisa Rodriguez	82				
14254	12/8/2019	01/06/2019	Mengar Ram Verma	1000777	Tool 5 Hours MD	1				
14753	12/1/2019	01/06/2019	Mengar Ram Verma	1000953	MD Paul R Meier	1				
14582	12/2/2019	01/06/2019	Mengar Ram Verma	1000545	MD Elisa Rodriguez	1				
14591	12/2/2019	01/06/2019	Mengar Ram Verma	1000632	MD Elisa Rodriguez	10				
14290	12/8/2019	01/06/2019	Mengar Ram Verma	1000837	MD Paul R Meier	1				
14403	12/1/2019	01/06/2019	Mengar Ram Verma	1000951	MD Paul R Meier	1				

Figure .: Continue Coding and Charge QA Worksheet Detail – Action

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Str. No.	Posting Date	Operator Name	Batch Number	Doctor Name	Trans	Errors	Action
14545	08/06/2023	Rupender Singh	1771152	WAPNO (Writter)	1	0	View Edit Delete
14546	08/06/2023	Rupender Singh	1771152	WAPNO (Writter)	0	0	View Edit Delete
14547	02/06/2023	Shivender Singh	1771157	WAPNO (Writter)	0	0	View Edit Delete
14548	08/06/2023	Rupender Singh	1771152	WAPNO (Writter)	0	0	View Edit Delete
14549	02/06/2023	Shivender Singh	1771157	WAPNO (Writter)	0	0	View Edit Delete
14550	08/06/2023	Rupender Singh	1771152	WAPNO (Writter)	0	0	View Edit Delete
14545	08/06/2023	Rupender Singh	1771152	WAPNO (Writter)	0	0	View Edit Delete
14546	08/06/2023	Rupender Singh	1771152	WAPNO (Writter)	0	0	View Edit Delete
14547	02/06/2023	Shivender Singh	1771157	WAPNO (Writter)	0	0	View Edit Delete
14548	08/06/2023	Rupender Singh	1771152	WAPNO (Writter)	0	0	View Edit Delete
14549	02/06/2023	Shivender Singh	1771157	WAPNO (Writter)	0	0	View Edit Delete
14550	08/06/2023	Rupender Singh	1771152	WAPNO (Writter)	0	0	View Edit Delete
14545	08/06/2023	Rupender Singh	1771152	WAPNO (Writter)	0	0	View Edit Delete
14546	08/06/2023	Rupender Singh	1771152	WAPNO (Writter)	0	0	View Edit Delete
14547	02/06/2023	Shivender Singh	1771157	WAPNO (Writter)	0	0	View Edit Delete
14548	08/06/2023	Rupender Singh	1771152	WAPNO (Writter)	0	0	View Edit Delete
14549	02/06/2023	Shivender Singh	1771157	WAPNO (Writter)	0	0	View Edit Delete
14550	08/06/2023	Rupender Singh	1771152	WAPNO (Writter)	0	0	View Edit Delete

Once Worksheet is 'Set as Completed', User can make modification in it. Are you Sure to Set as Generated?

Figure .: Continue Payment QA Worksheet Detail – Action

Str. No.	Posting Date	Operator Name	Batch Number	Doctor Name	Trans	Errors	Action
14545	08/06/2023	Rupender Singh	1771152	WAPNO (Writter)	1	0	View Edit Delete
14546	08/06/2023	Rupender Singh	1771152	WAPNO (Writter)	0	0	View Edit Delete
14547	02/06/2023	Shivender Singh	1771157	WAPNO (Writter)	0	0	View Edit Delete
14548	08/06/2023	Rupender Singh	1771152	WAPNO (Writter)	0	0	View Edit Delete
14549	02/06/2023	Shivender Singh	1771157	WAPNO (Writter)	0	0	View Edit Delete
14550	08/06/2023	Rupender Singh	1771152	WAPNO (Writter)	0	0	View Edit Delete
14545	08/06/2023	Rupender Singh	1771152	WAPNO (Writter)	0	0	View Edit Delete
14546	08/06/2023	Rupender Singh	1771152	WAPNO (Writter)	0	0	View Edit Delete
14547	02/06/2023	Shivender Singh	1771157	WAPNO (Writter)	0	0	View Edit Delete
14548	08/06/2023	Rupender Singh	1771152	WAPNO (Writter)	0	0	View Edit Delete
14549	02/06/2023	Shivender Singh	1771157	WAPNO (Writter)	0	0	View Edit Delete
14550	08/06/2023	Rupender Singh	1771152	WAPNO (Writter)	0	0	View Edit Delete

Once Worksheet is 'Set as Completed', User can make modification in it. Are you Sure to Set as Generated?

Figure .: Continue Payment QA Worksheet Detail – Action

Search In Sample

After selecting the “Search in Sample” option from the Left Navigation Bar (QA Manager > Search in Sample > QA Search Sample Record). User will be able to view the QA Search Sample Record Information in the “Search in Sample” menu as shown in below figure: . This page will appear from left navigation bar QA Manager.

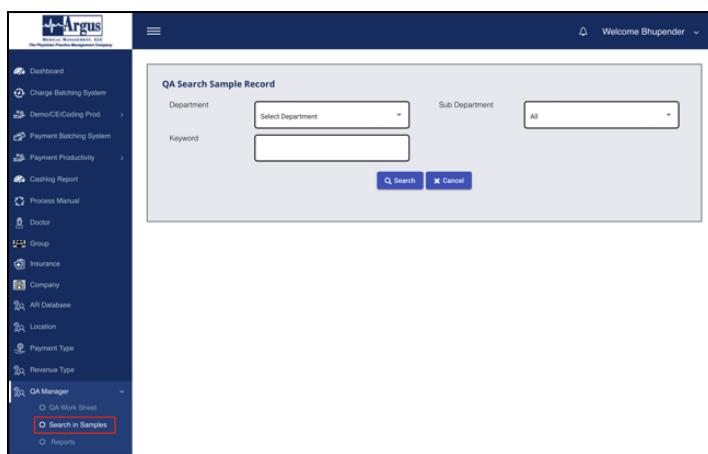


Figure no:

QA Search Sample Record will have the following filter options:

- Department: User will be able to Select the department from the “Department” Drop-down list.
- Sub-Department: User will be able to Select the Sub-Department from the “Sub-Department” Drop-down list.
- Keyword: User will be able to input the keyword into “keyword” option.

User can select desired Search options as required. It is not Mandatory to fill all the Options provided.

After selecting the options, User will click on the “Search” button to search that task as per the Inputs provided. If the User clicks on the “Cancel” button, the selected Filters will be removed instantly.

Reports

After selecting the “Reports” option from the Left Navigation Bar (QA Manager > Reports > QA Reports). User will be able to view the QA Reports Information in the “Reports” menu as shown in below figure: . This page will appear from left navigation bar QA Manager.

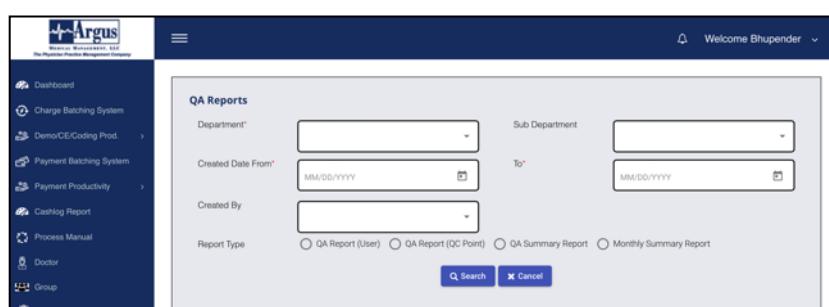


Figure no:

QA Reports will have the following filter options:

- Department: User will be able to Select the department from the “Department” Drop-down list.
- Sub-Department: User will be able to Select the Sub-Department from the “Sub-Department” Drop-down list.
- Created Date From & To: User will be able to Select the Date range from the “Created Date From & To” option.
- Created By: User will be able to Select the name from the “Created By” Drop-down list.
- Report Type: User will be able to Select the any one option checkbox from the following filters: QA Report (User), QA Report (QC Point, QA Summary Report & Monthly Summary Report

User can select desired Search options as required. It is not Mandatory to fill all the Options provided.

After selecting the options, User will click on the “Search” button to search that task as per the Inputs provided. If the User clicks on the “Cancel” button, the selected Filters will be removed instantly.