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

Table of Contents

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	• 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	• 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 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.

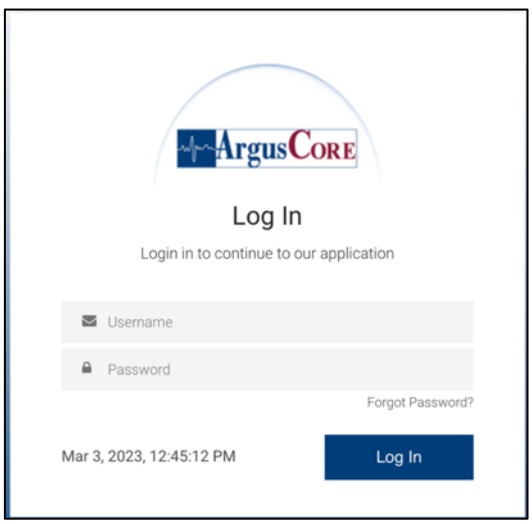


Figure 1: Login Page

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.

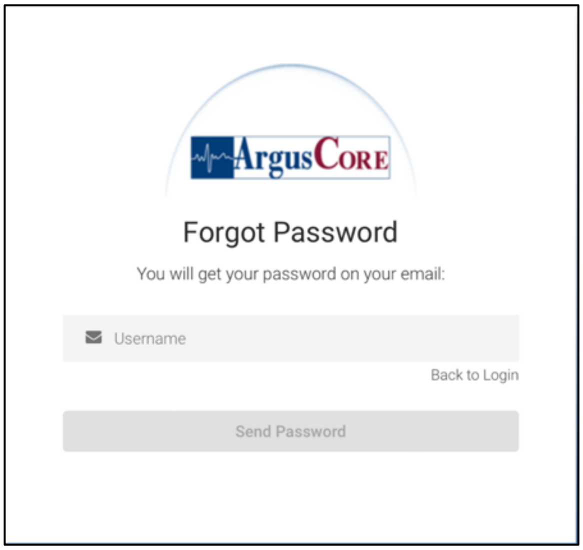


Figure 2: Forgot password page.

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

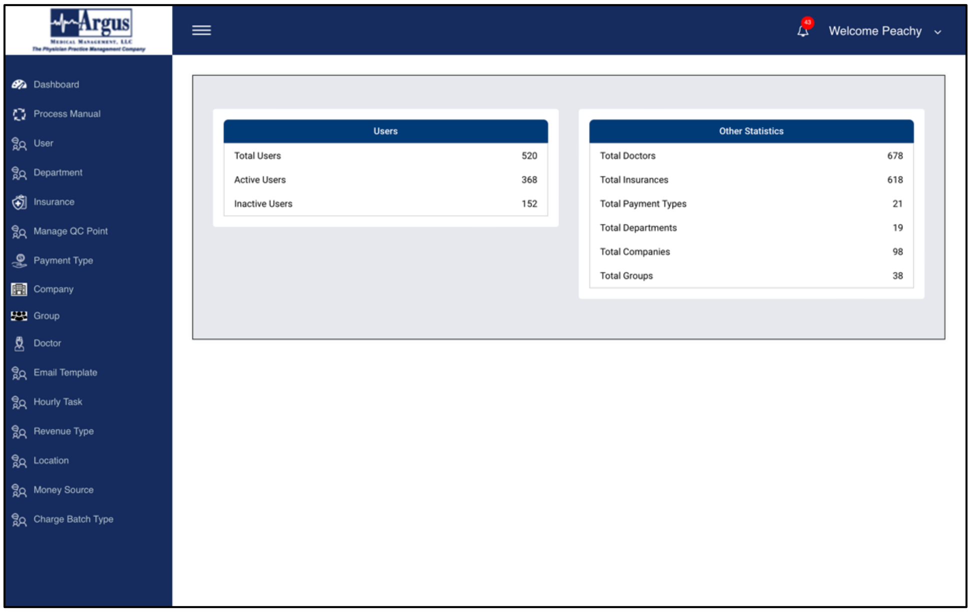


Figure no: 3 Dashboard/Landing Page

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.

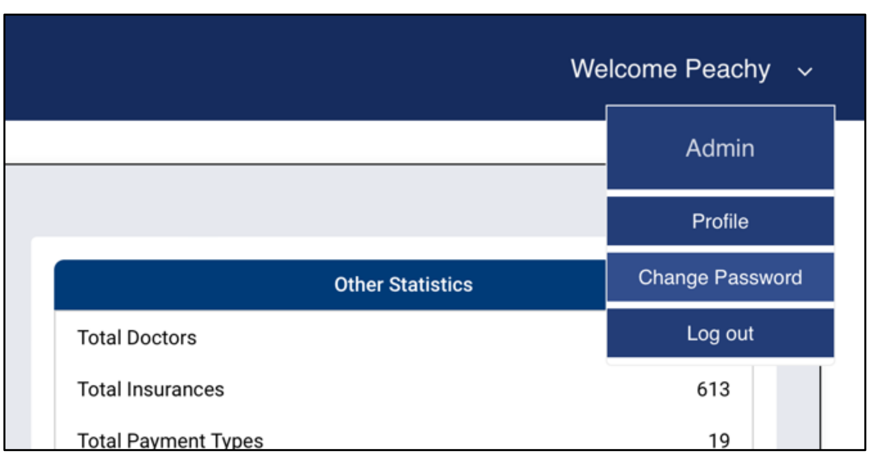


Figure: 4 Option Drop-Down

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

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.

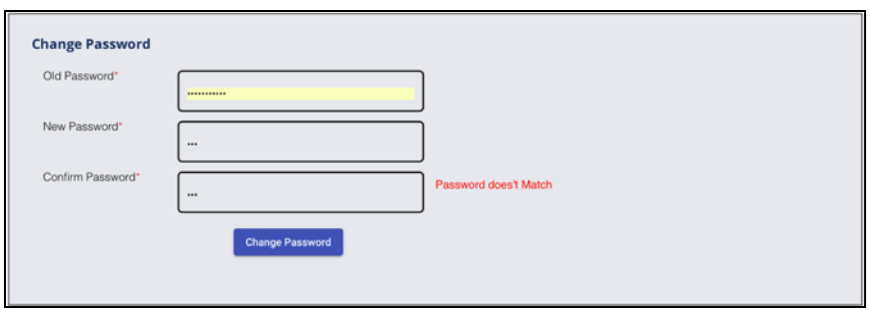


Figure: 4.2 Change Password - Error

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.

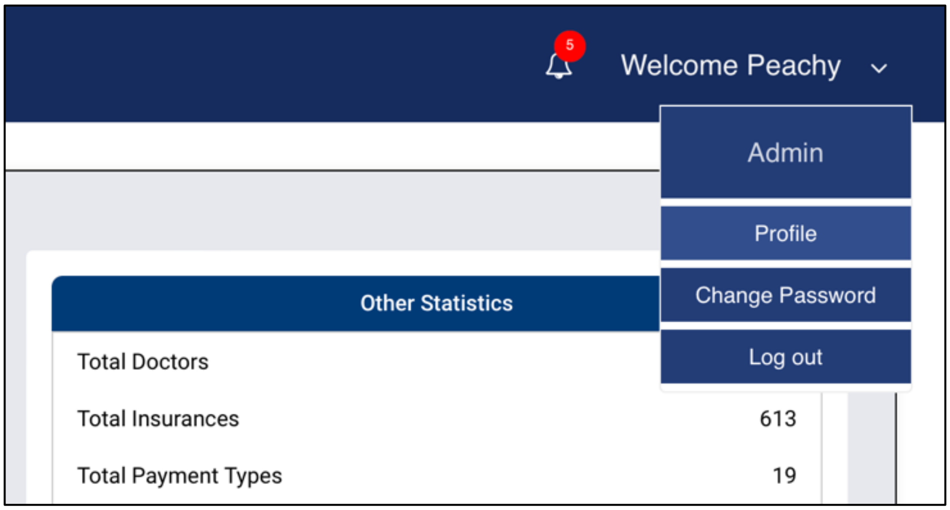


Figure: 5.1 Admin Menu Drop Down

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.

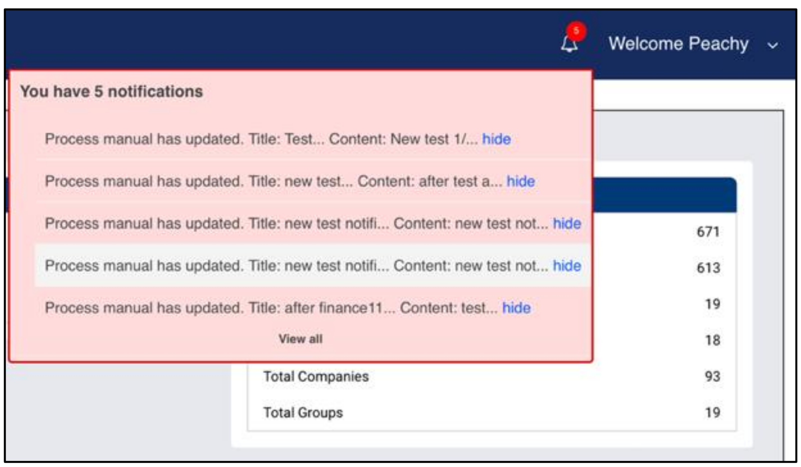


Figure: 6.1 Notification

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.

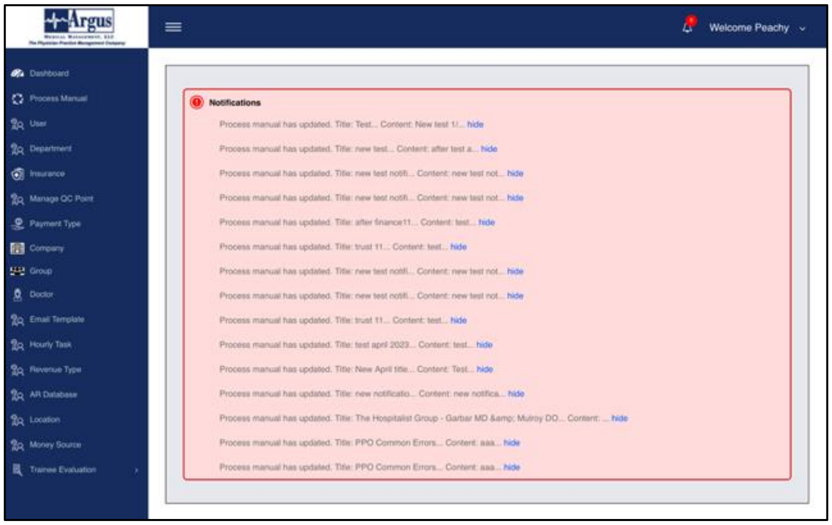


Figure: 6.2 Notification Menu – View All

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.

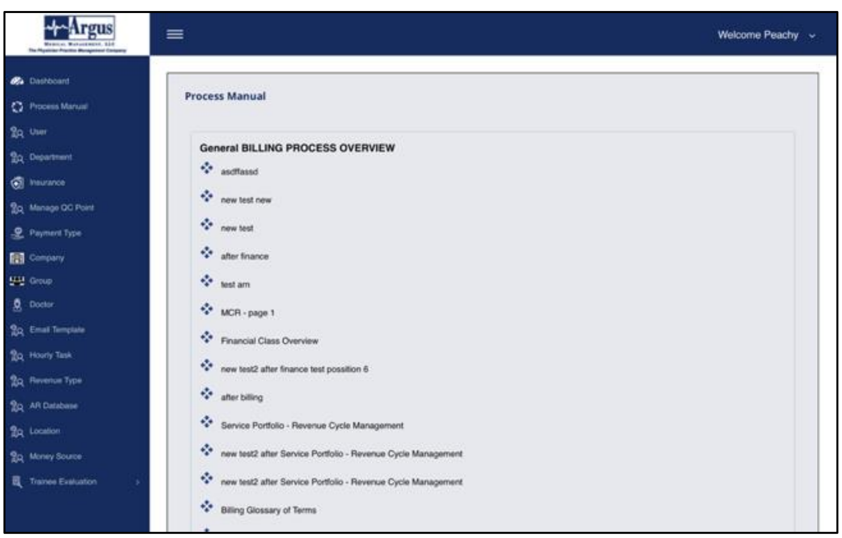


Figure: 7 Process Manual

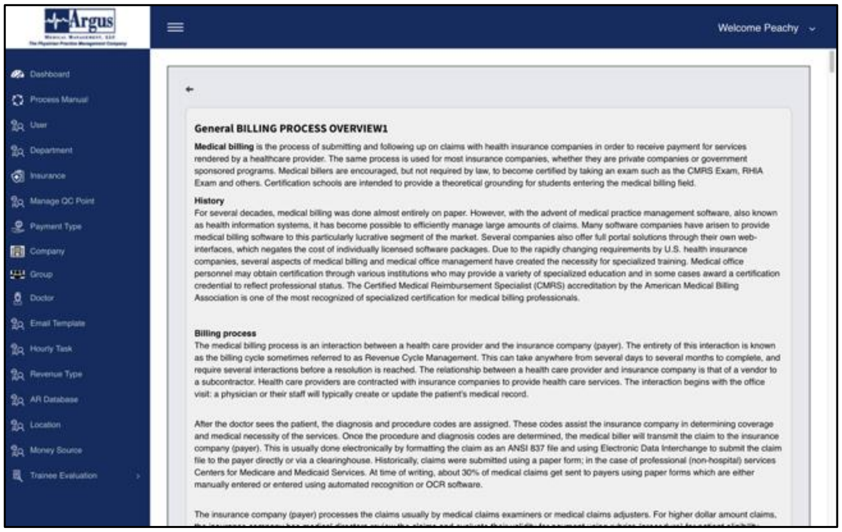


Figure: 7.1 Process Manual Detail

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.

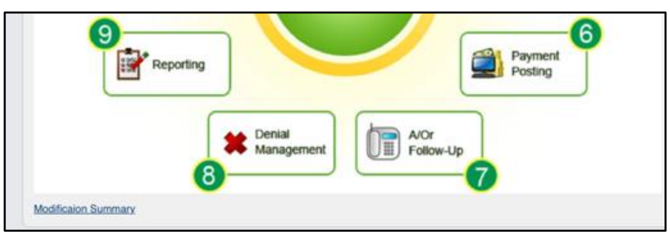


Figure: 8.1 User Manual – Modification Summary

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.

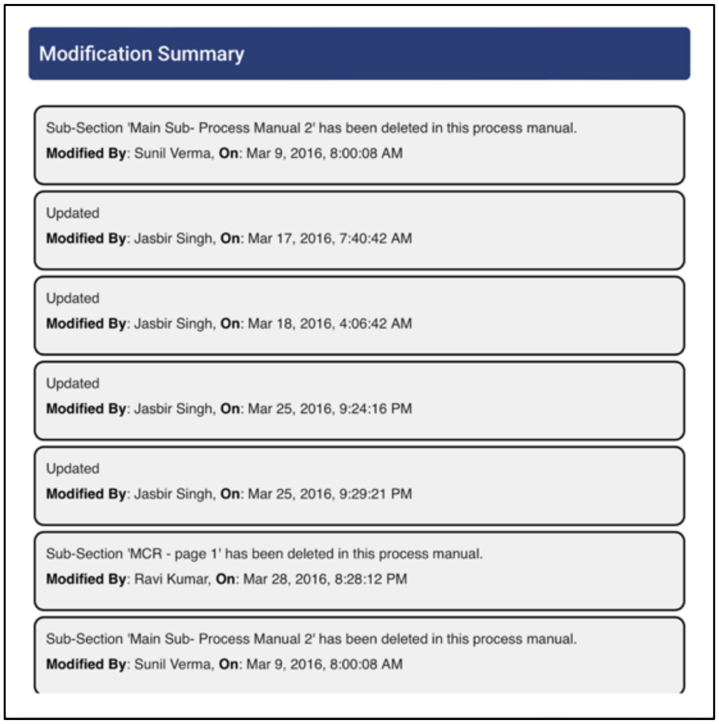


Figure: 8.2 User Manual – Modification Summary

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.

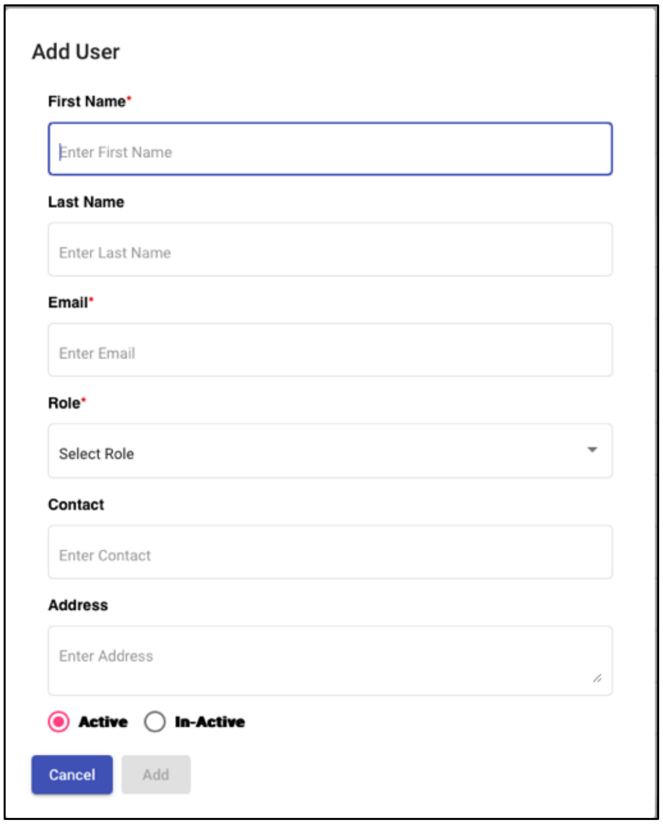


Figure: 18 Add User page

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).

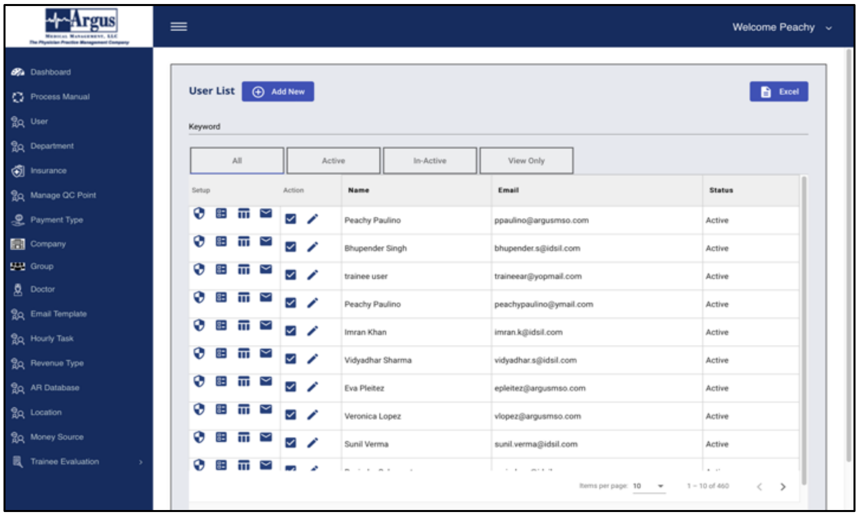


Figure: 9 User List

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.

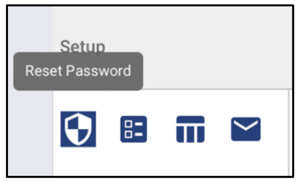


Figure: 10 Reset Password – Setup

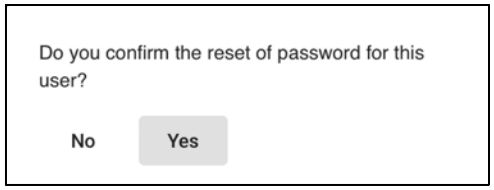


Figure: 10.1 Reset Password Pop-up – Setup

- 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.

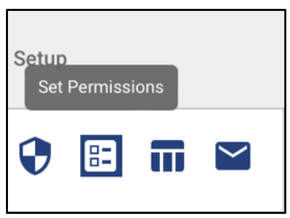


Figure: 11.1 Set Permissions – Setup

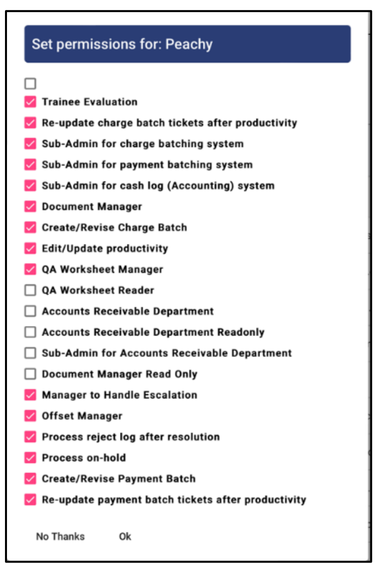


Figure: 11.2 Set Permissions

- 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

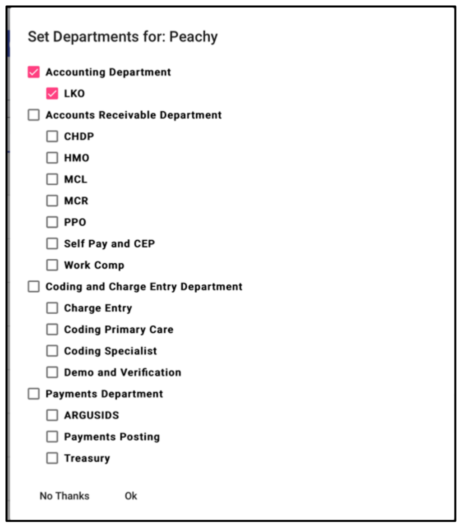


Figure: 12.2 Set Departments

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

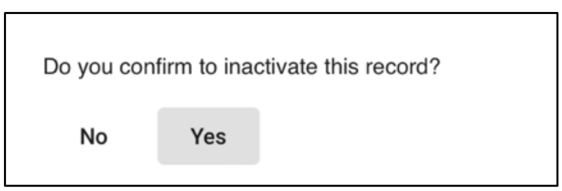


Figure: 14.1 Active/In-Active Status Confirmation

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

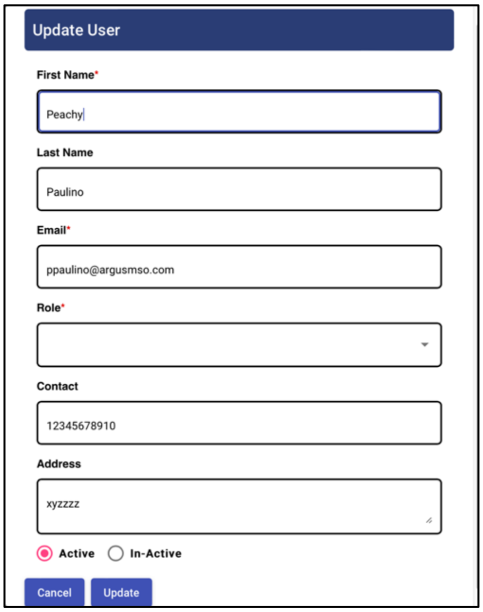


Figure: 15.2 Update/Edit users

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.

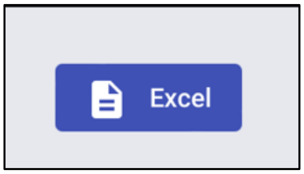


Figure: 17.1 Excel Sheet Download

ID	Name	Email	Contact	Address	Enabled	Deleted	Created On	Modified On
1	Peachy Paulino	ppaulino@argusmso.com	12345678910	xyzzzz	TRUE	FALSE	2013/08/06	2023/04/24
3	bhupender Singh	bhupender.s@idsil.com	123456789	Punjabs	TRUE	FALSE	2012/11/27	2023/04/25
4	trainee user	traineear@yopmail.com	123456789		TRUE	FALSE	2012/11/27	2022/12/14
5	Peachy Paulino	peachypaulino@ymail.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.s@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
17	Rosalie Pettigrew	rpettigrew@argusmso.com	15622995228	Long Beach, CA	TRUE	FALSE	1970/01/01	2014/02/21
18	Mary Keys	mkeys@argusmso.com	15622995222	Long Beach, CA	FALSE	FALSE	1970/01/01	2016/02/09
19	Maria Infante	minfante@argusmso.com	15622995234	Long Beach, CA	FALSE	FALSE	1970/01/01	2016/02/15
21	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
22	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.

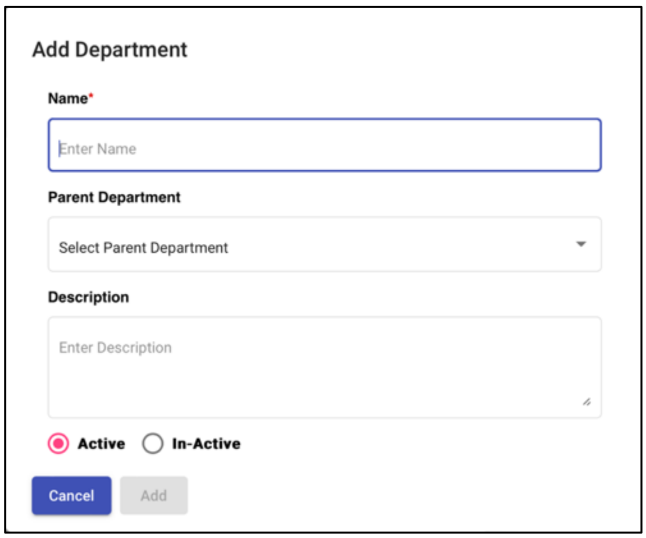


Figure: 23 Add Department

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).

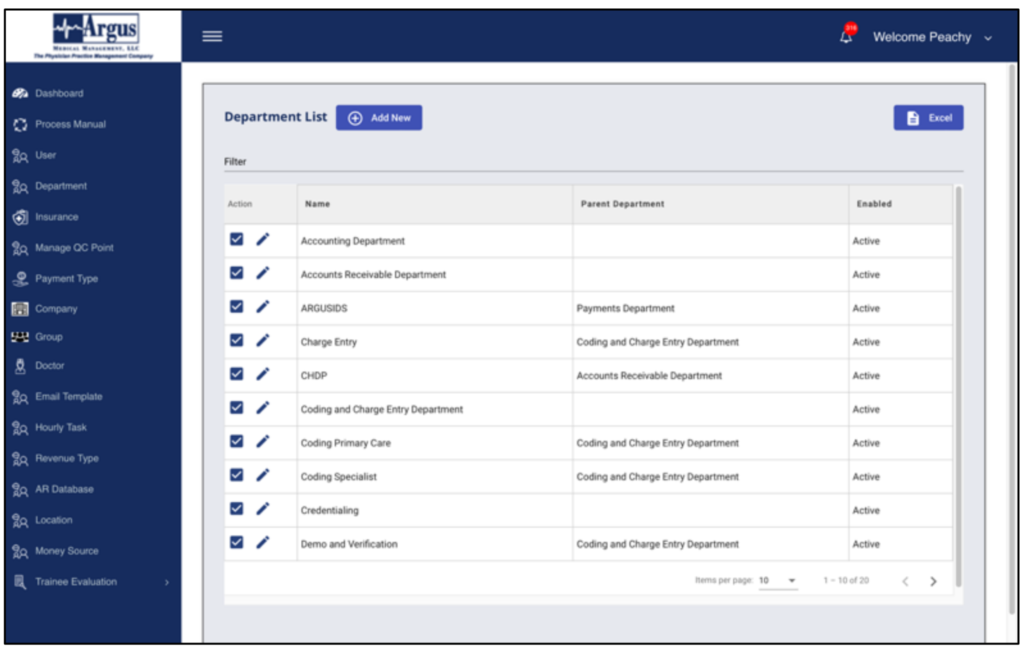


Figure: 19 Department List

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.

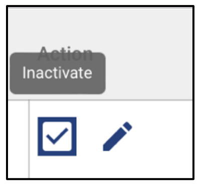


Figure: 20 Active/In-Active Status -Action

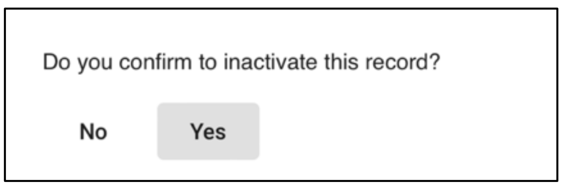


Figure: 20.1 Active/In-Active Status Confirmation

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.

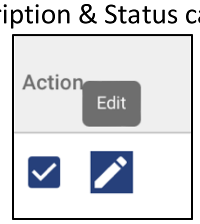


Figure: 21.1 Edit -Action

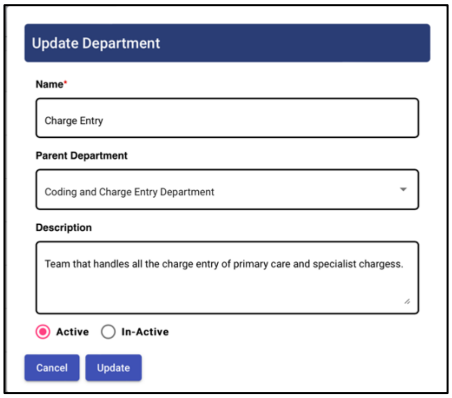


Figure: 21.2 Edit/Update Department

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

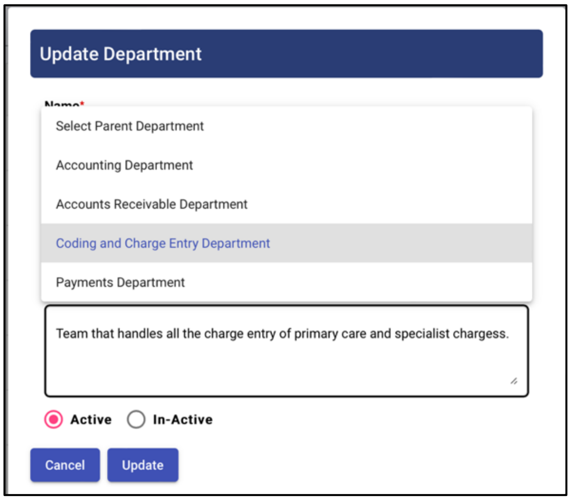


Figure: 21.3 Selecting Parent Department

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.

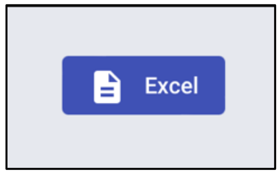


Figure:. Excel Sheet Download

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

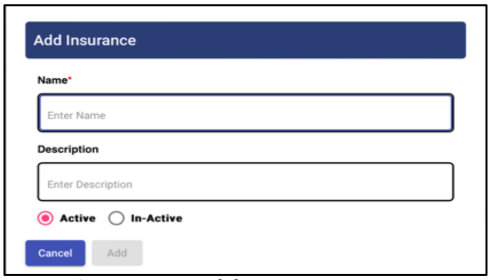


Figure: 28 Add Insurance

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)

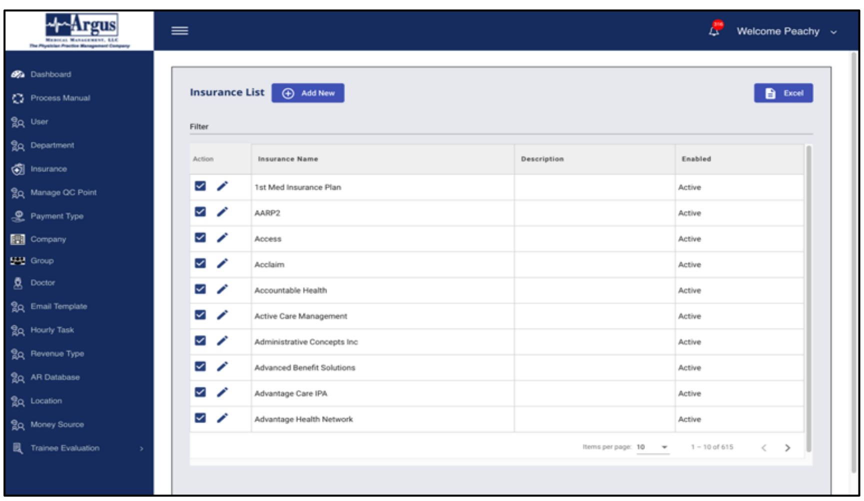


Figure: 24 Insurance List

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.

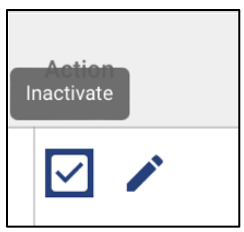


Figure: 25 Active/In-Active Checkbox – Action

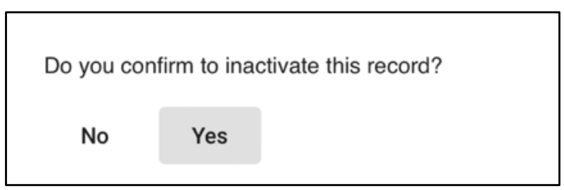


Figure:.1 Active/In-Active Status Confirmation

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

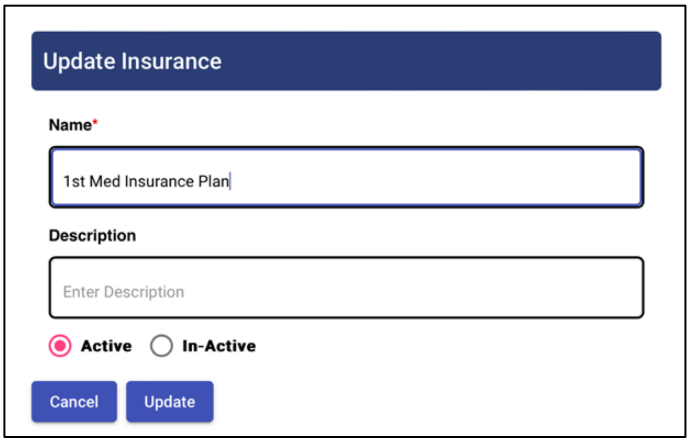


Figure: 26.2 Update/Edit Insurance

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.

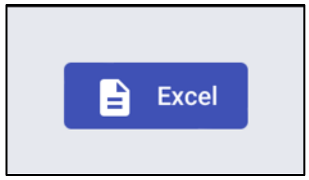
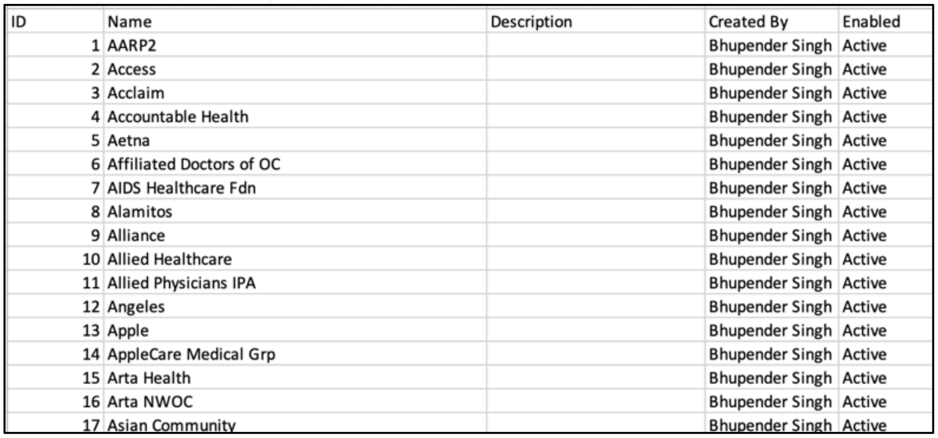


Figure: 42.1 Excel Sheet Download Button



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

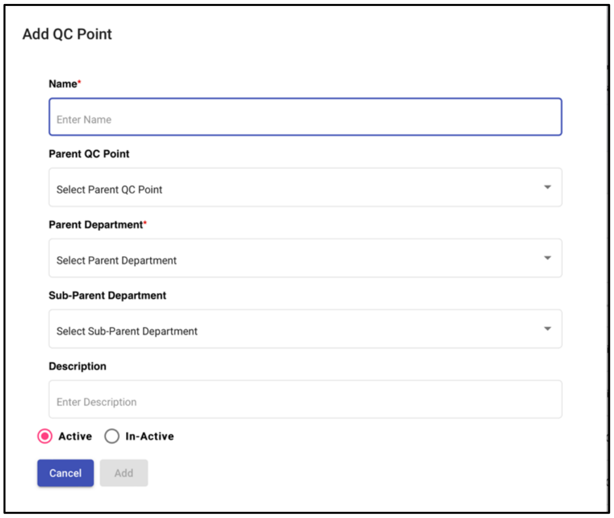


Figure: 34 Add QC Point

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.

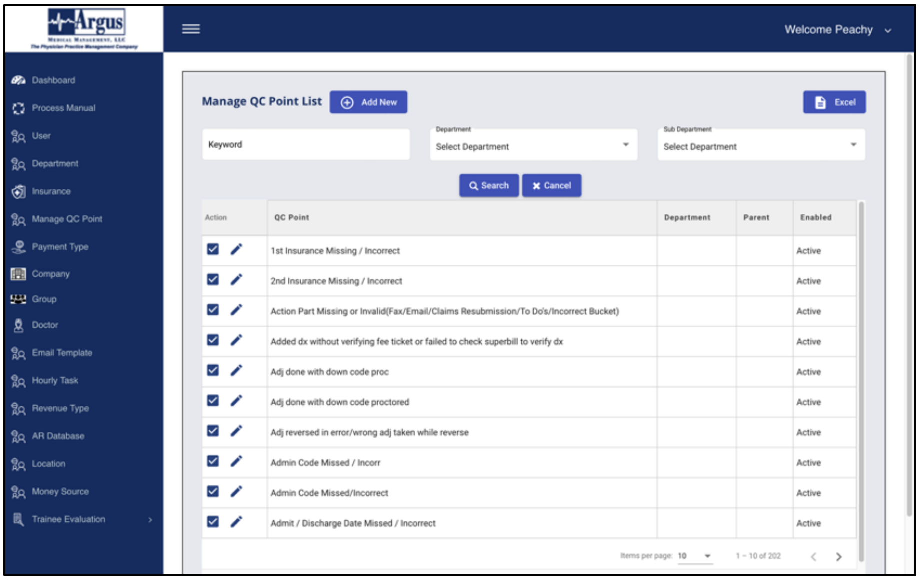


Figure: 29 Manage QC Point list

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.

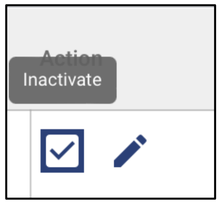


Figure: 30 Active/In-Active Checkbox – Action

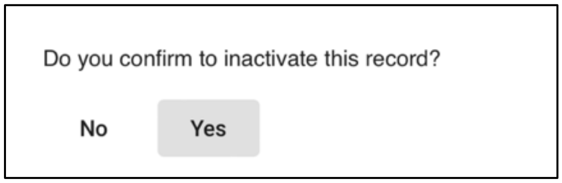


Figure:.1 Active/In-Active Status Confirmation

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

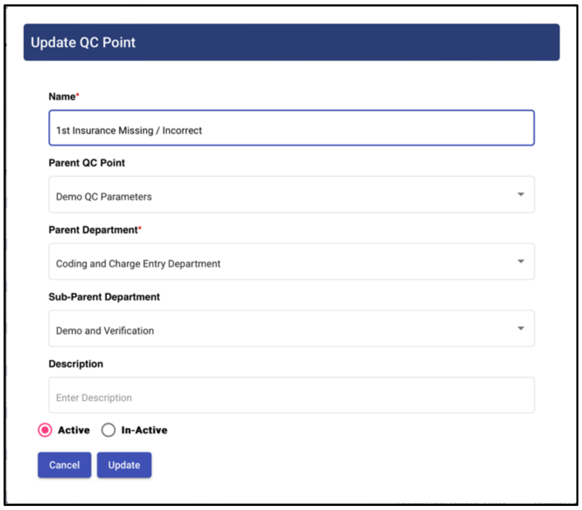


Figure: 31.2 Edit/Update QC Point

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”.

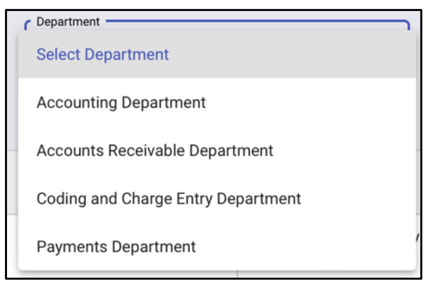


Figure: 33.1 Select Department

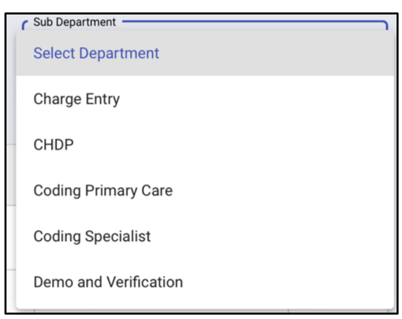


Figure: 33.2 Select Sub-Department

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.

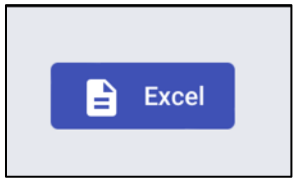


Figure: 42.1 Excel Sheet Download Button

	Name	Description	Parent	Department	Sub Department	Enabled
1	Demo QC Parameters			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 Copay not updated	Notes Field Not Updated changed with Notes Field/Specialist Copay not Updated WEF-11/15/20	Demo QC Parameters	Coding and Charge Entry Department	Demo and Verification	Active
12	SOC$ amount Missing/Incorrect (MCD only)	Soc not/wrong updated changed with SOC$ amount Missing/Incorrect (MCD only)WEF-11/15/202	Demo QC Parameters	Coding and Charge Entry Department	Demo and Verification	Active
13	Referring / PCP Info 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# Missing / Incorrect	Group# & copay 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-11/15/2	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 (	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			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)

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)

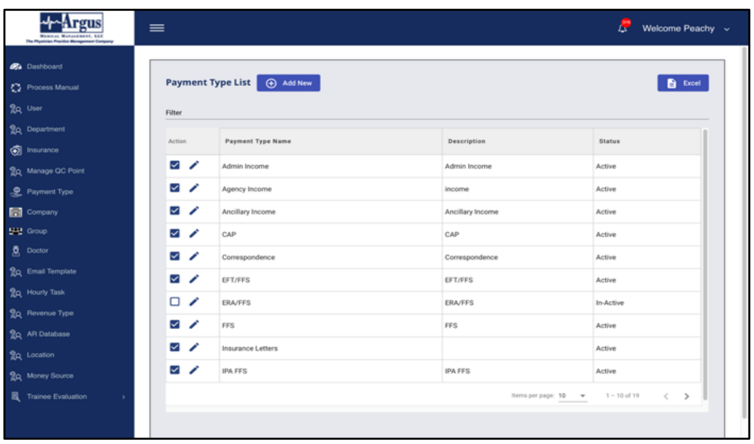


Figure: 35 Payment Type List

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.

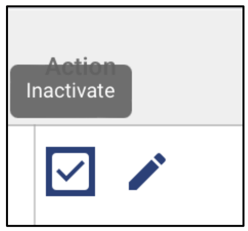


Figure: 36 Active/In-Active Checkbox – Action

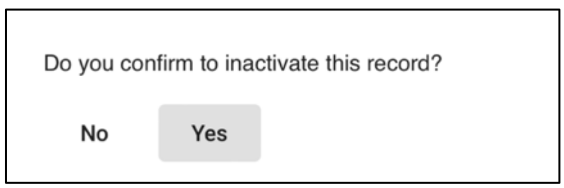


Figure:.1 Active/In-Active Status Confirmation

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

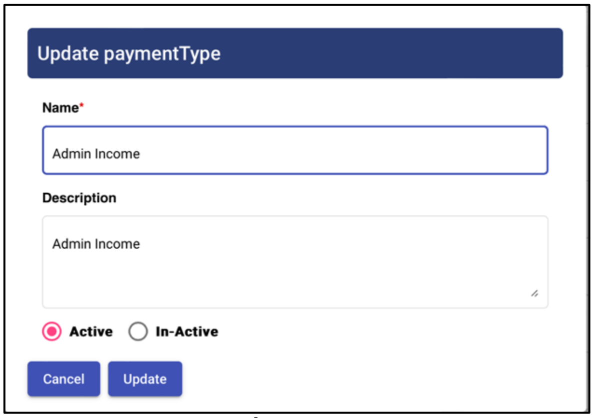


Figure: 37.2 Update/Edit Payment Type - Action

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.

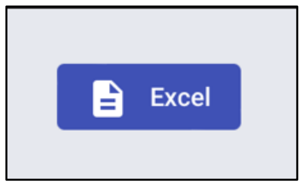


Figure: 42.1 Excel Sheet Download Button

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	Insurance 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)

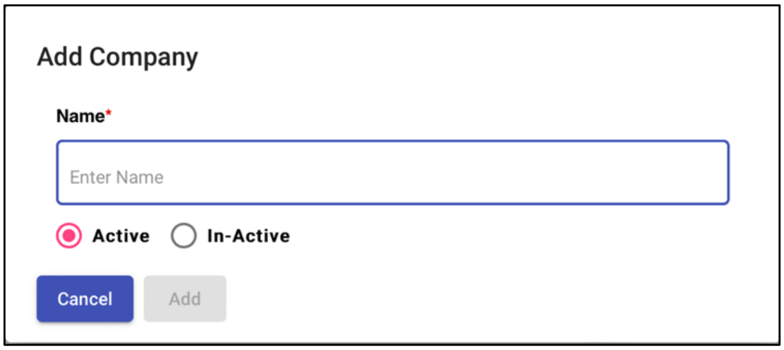


Figure: 43 Add Company

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).

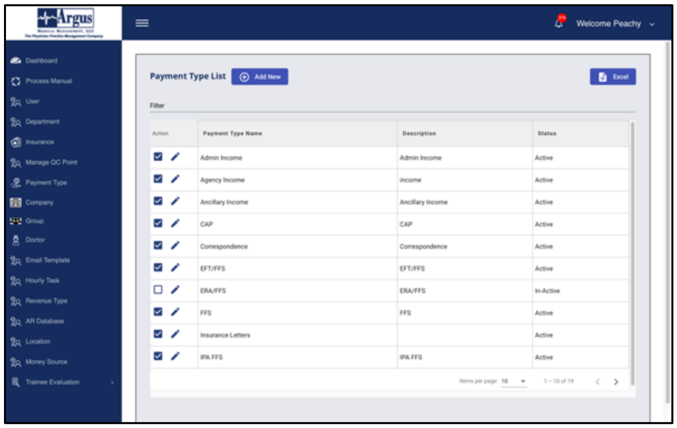


Figure: 40 Company List

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

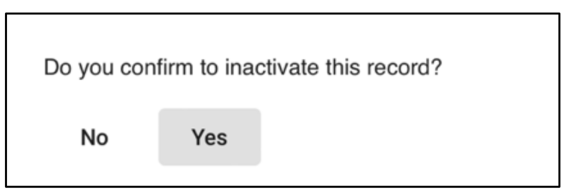


Figure:.1 Active/In-Active Status Confirmation

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

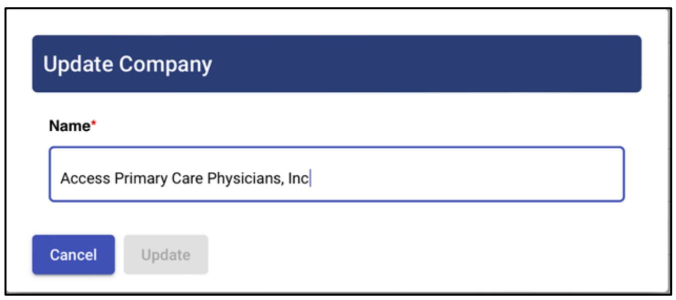


Figure: 41.2 Update/Edit Company

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.

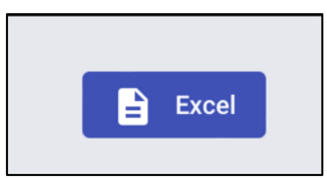


Figure: 42.1 Excel Sheet Download Button

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	CICVH & 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.

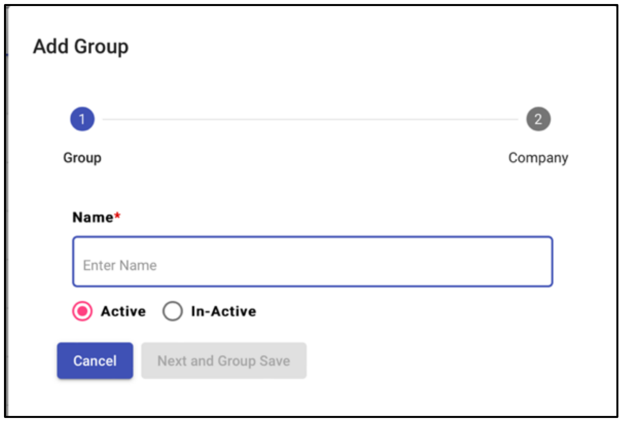


Figure: 48.1 Add New Group 1st Section – Name

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.”

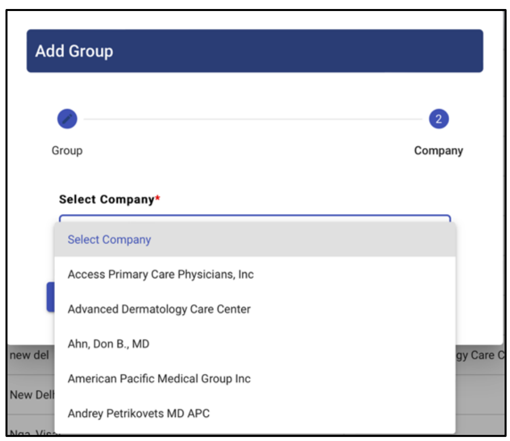


Figure: 48.2 Add Group 2nd Section - Select Company

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.”

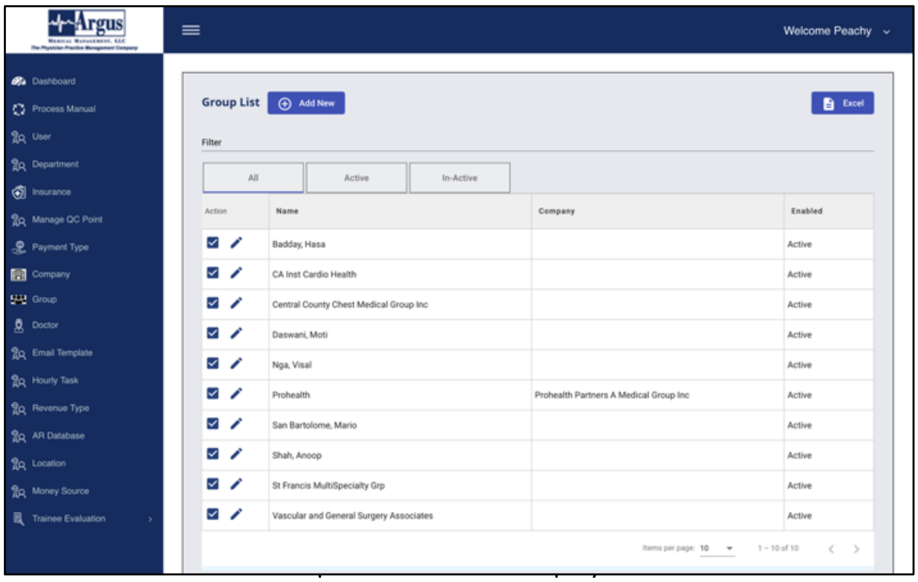
Duplicate Group name check

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)



- 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

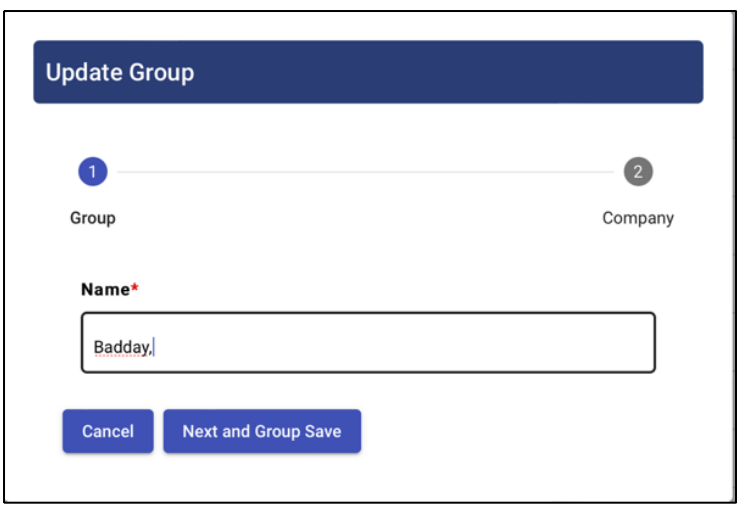


Figure: 46.2 Update/Edit Group 1st section – Name

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.

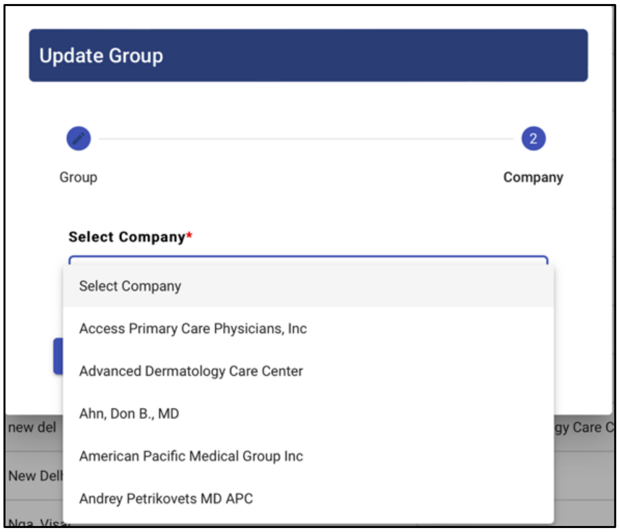


Figure: 46.3 Update/Edit Group 2nd Section – Select Company

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.

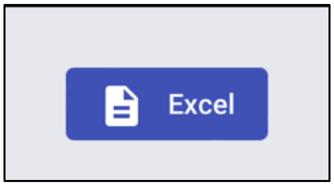


Figure: 47.1 Excel Sheet Download Button

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.

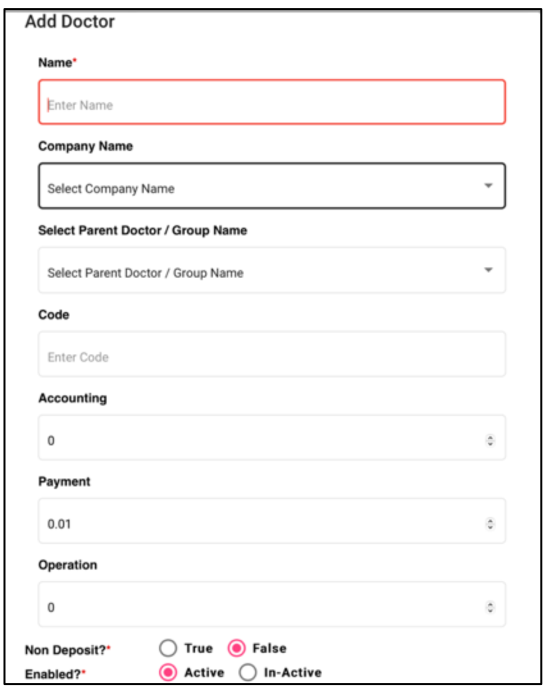


Figure: 53 Add doctor

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).

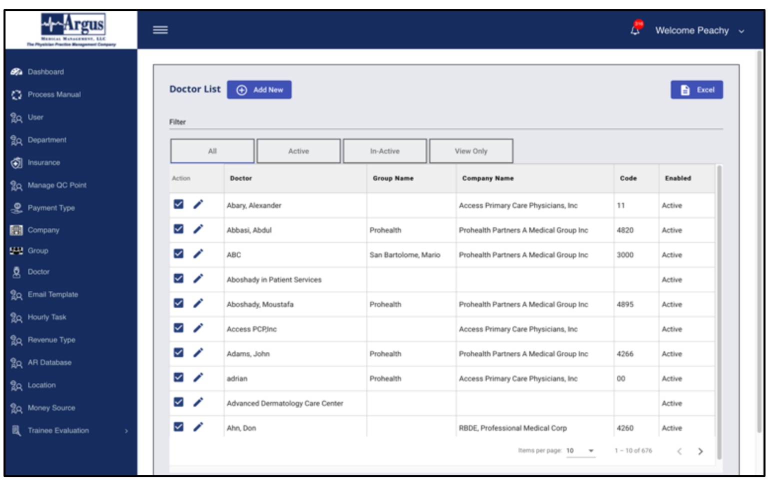


Figure: 49 Doctors List

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.

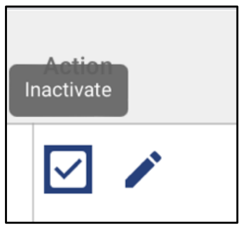


Figure: 49 Active/In-Active Status – Action

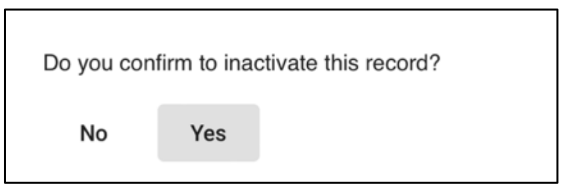


Figure:.1 Active/In-Active Status Confirmation

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

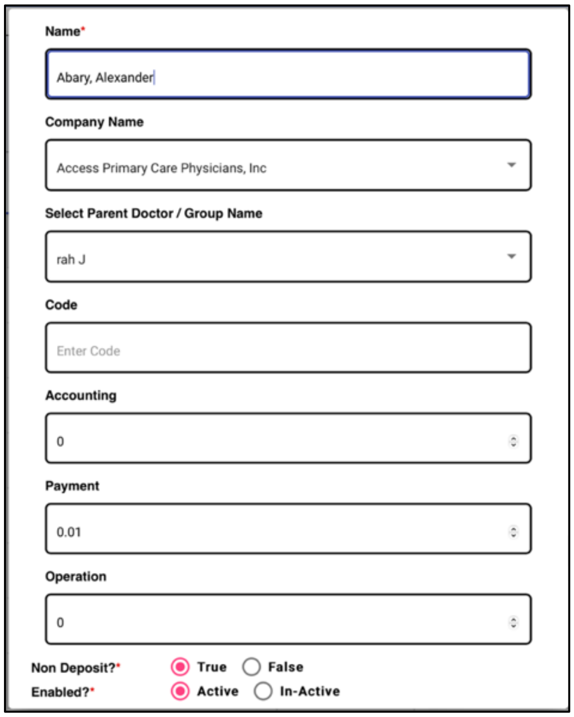


Figure: 50.2 Edit/Update Doctor– Action

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.

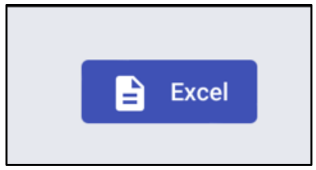


Figure: 52.1 Excel Sheet Option

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	Abbasi, 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	Aiyegbusi, Modupe	4540	0.01	0	0	FALSE	TRUE	FALSE	Prohealth	Prohealth Partners A Medical Group Inc	2023/02/08	2023/02/08
397	1	Allee, 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)

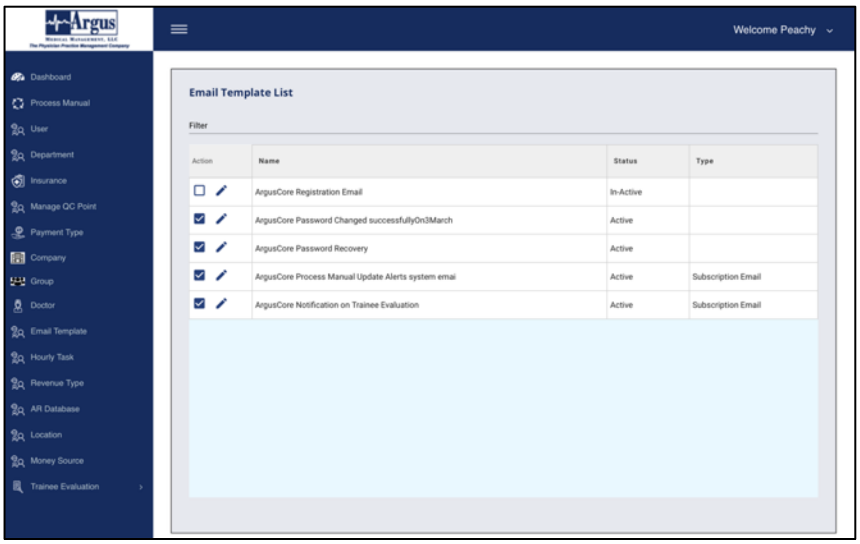


Figure: 54 Email Template List

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

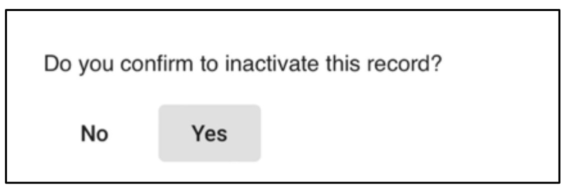


Figure:.1 Active/In-Active Status Confirmation

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.

The following options will appear on email template edit page:

- Name
- Content
- Status (Active/inactive)

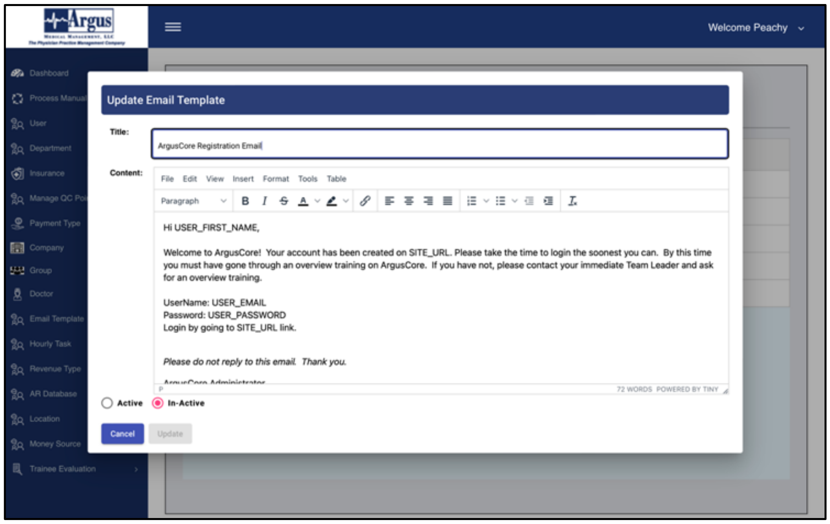


Figure: 55.2 Edit Email Template

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)

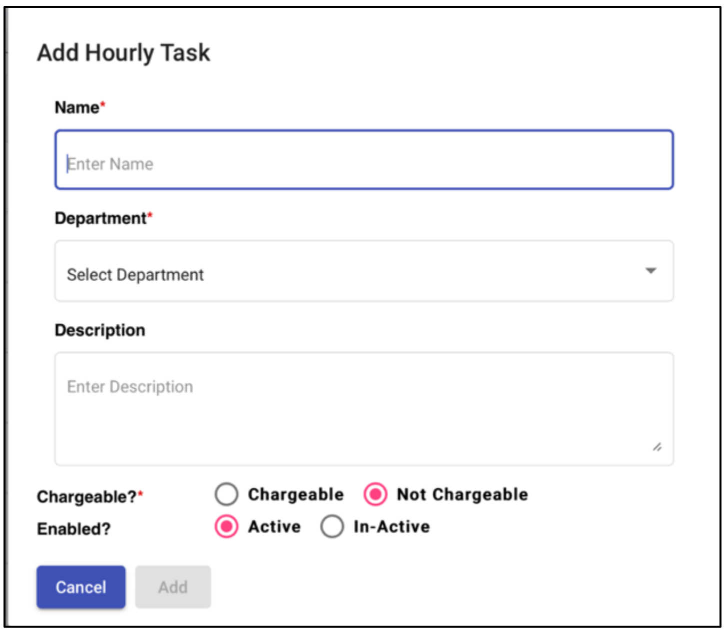


Figure: 60 Add Hourly Task

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)

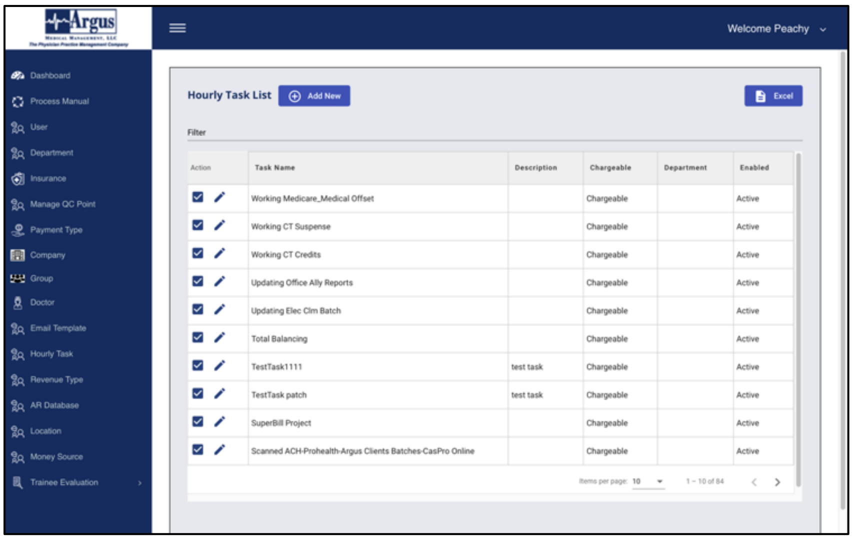


Figure: 56 Hourly Task List

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

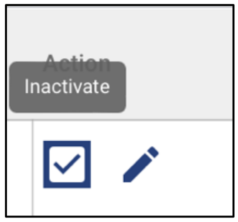


Figure: 57 Active/In-Active Checkbox – Action

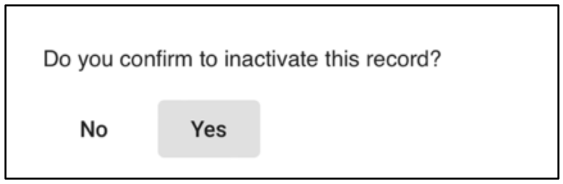


Figure:.1 Active/In-Active Status Confirmation

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

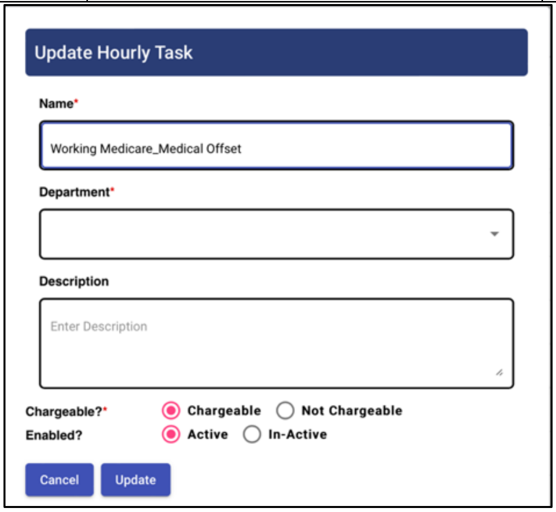


Figure: 8. Edit Icon – Action

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.

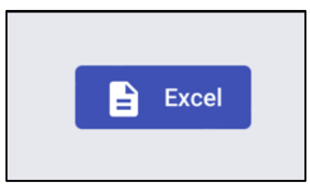


Figure: 52.1 Excel Sheet Option

ID	Name	Description	Deparment 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

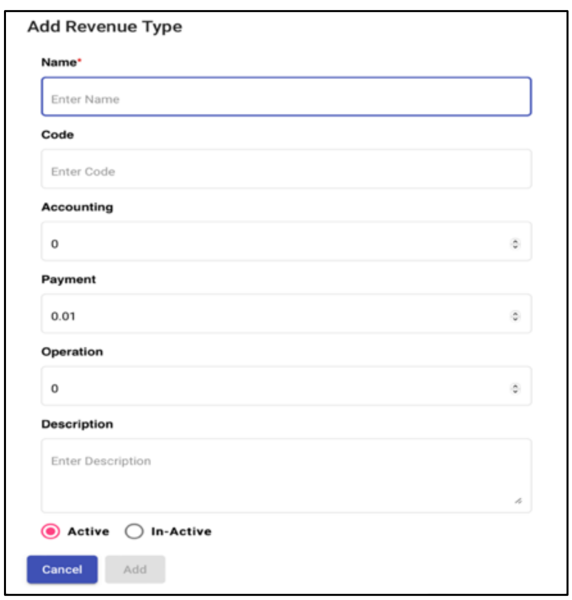


Figure: 64 Add revenue type

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)

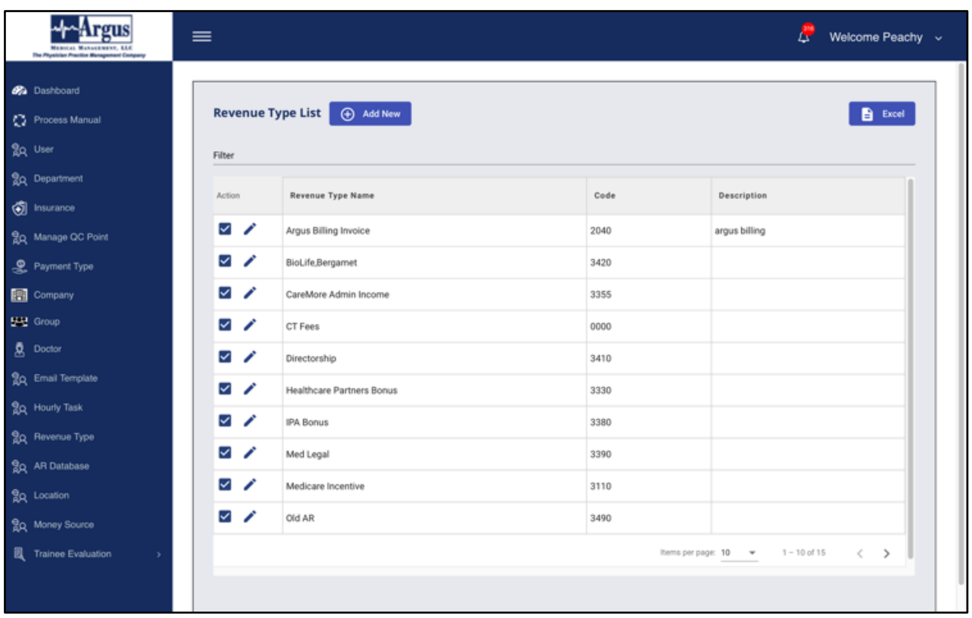


Figure: 61 Revenue Type List

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

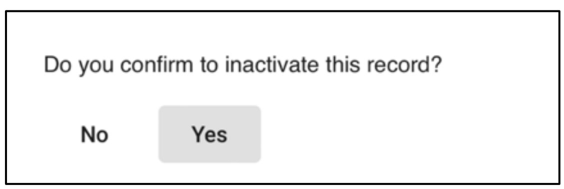


Figure:.1 Active/In-Active Status Confirmation

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

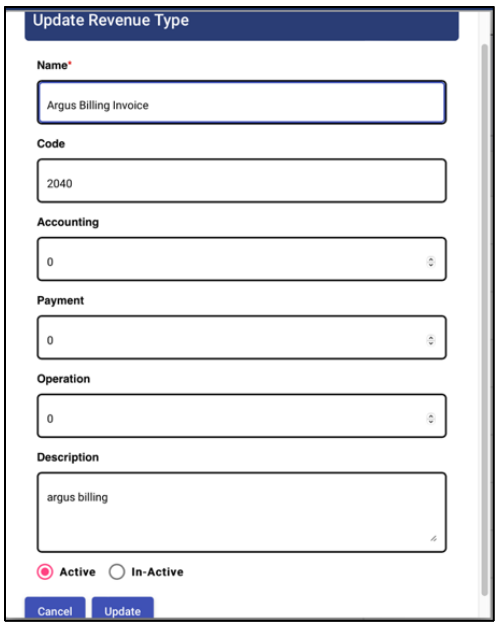


Figure: 63.2 Edit/Update Revenue Type– Action

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.

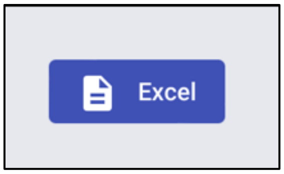


Figure: 52.1 Excel Sheet Option

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

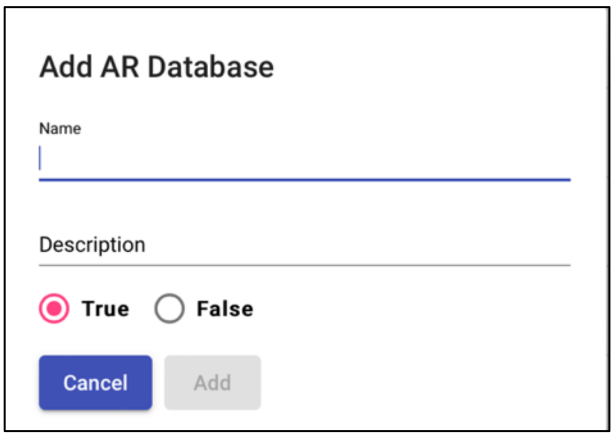


Figure 69: Add AR Database

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)

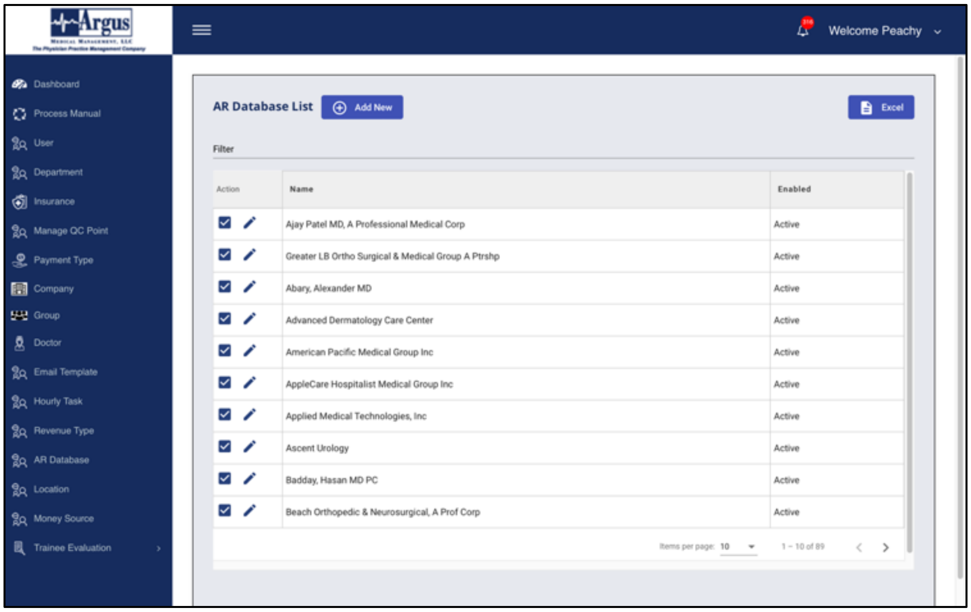


Figure 65: AR Database List

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:

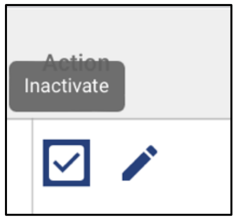


Figure 66: Active/In-Active Checkbox – Action.

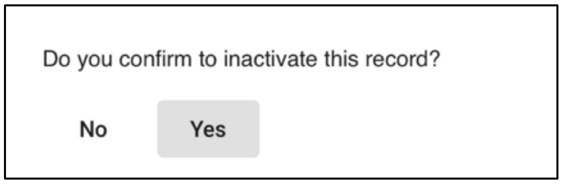


Figure:.1 Active/In-Active Status Confirmation

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.

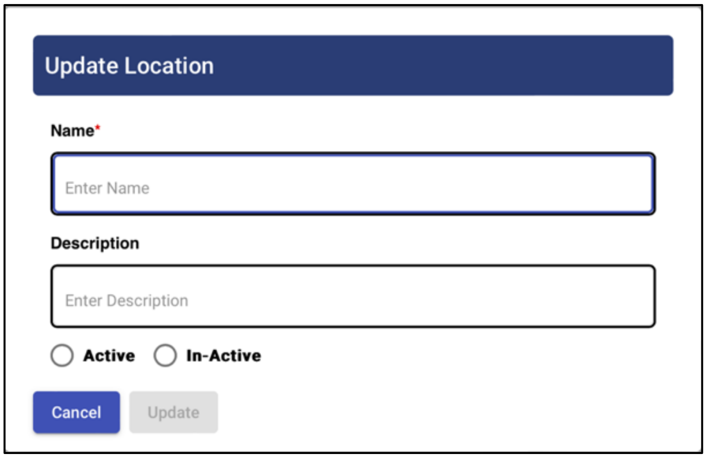


Figure 67.2: Edit/Update AR Database

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.

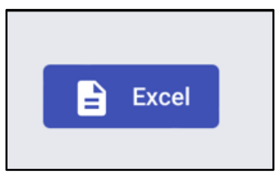


Figure: 52.1 Excel Sheet Option

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)

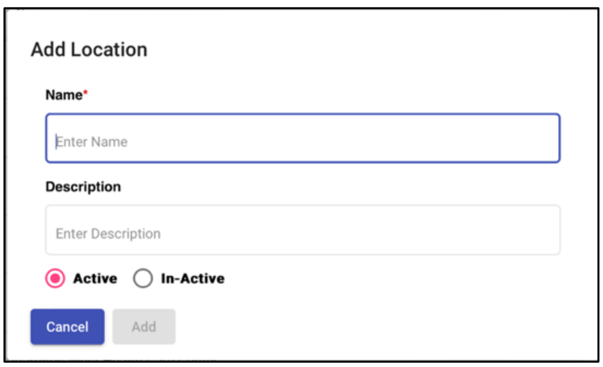


Figure 73: Add Location

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)

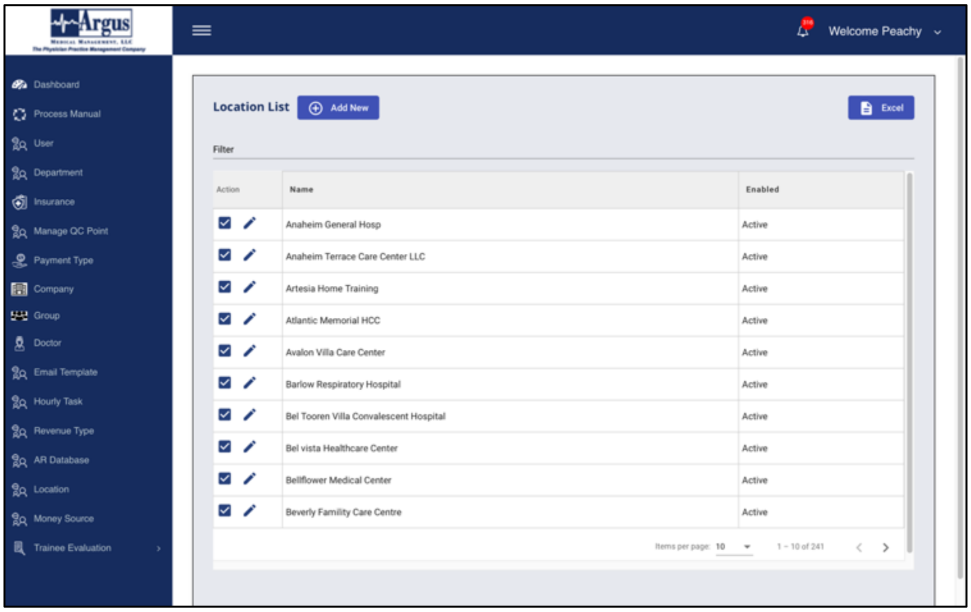


Figure 70: Location List

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.

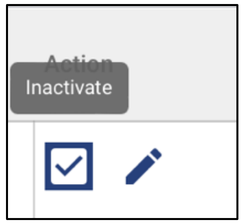


Figure 71: Active/In-Active Checkbox – Action.

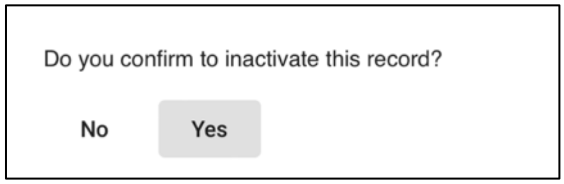


Figure:.1 Active/In-Active Status Confirmation

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.

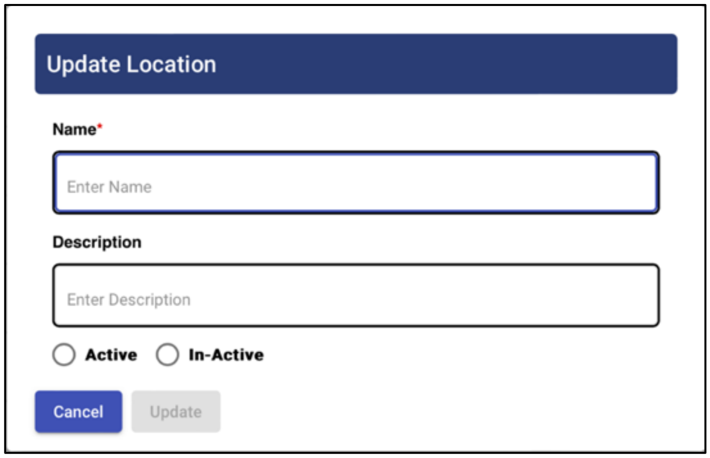


Figure 71.2: Edit/Update Location– Action

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.

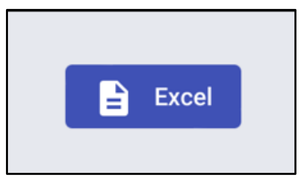


Figure: 52.1 Excel Sheet Option

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)

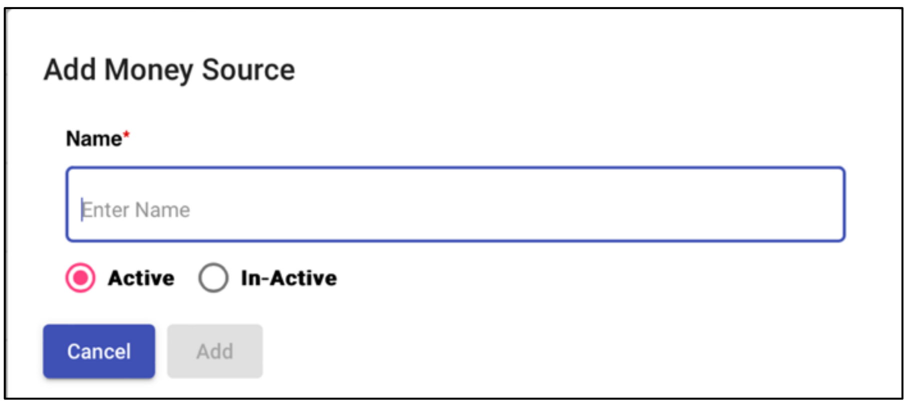


Figure 78: Add Money Source

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)

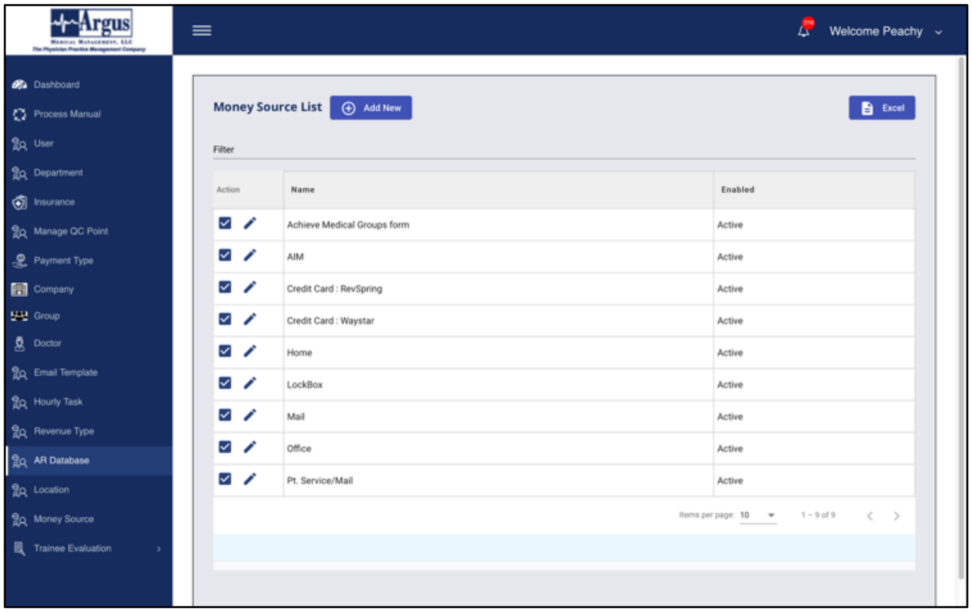


Figure 74: Money source list

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.

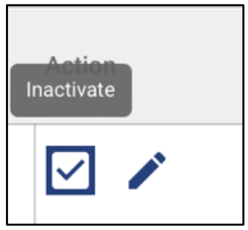


Figure 75: Active/In-Active Checkbox – Action.

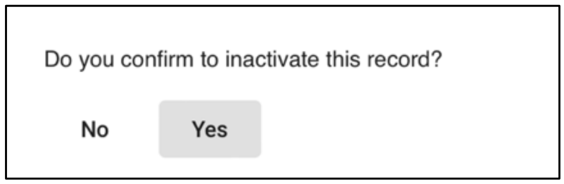


Figure:.1 Active/In-Active Status Confirmation

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.

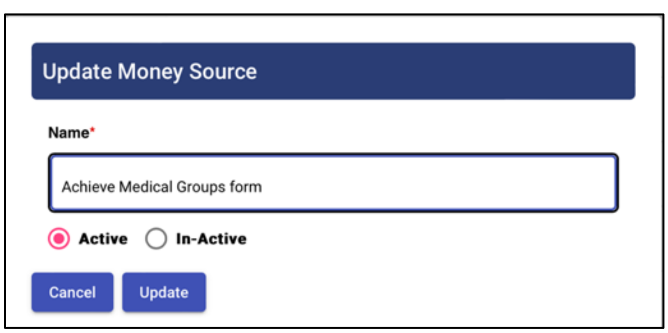


Figure 76.2: Edit/Update Money Source

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.

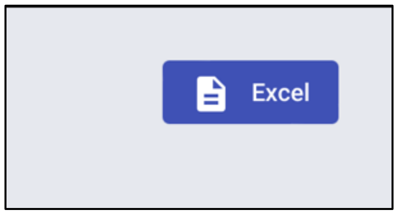


Figure: 52.1 Excel Sheet Option

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)

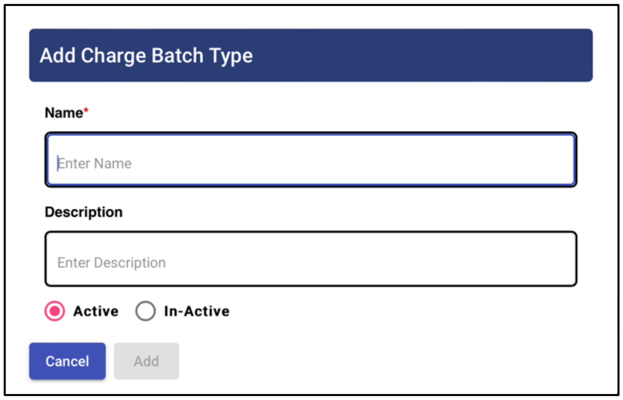


Figure 78: Add Charge Batch Type

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)

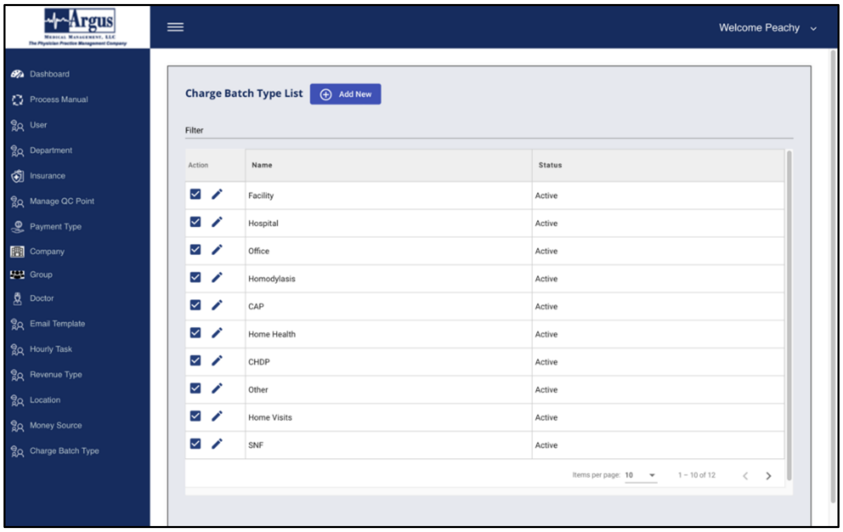


Figure 74: Money source list

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.

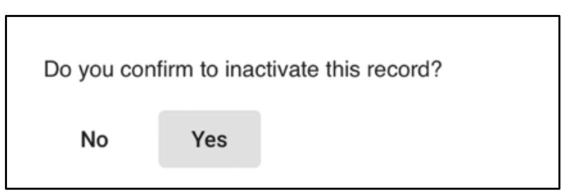


Figure:.1 Active/In-Active Status Confirmation

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.

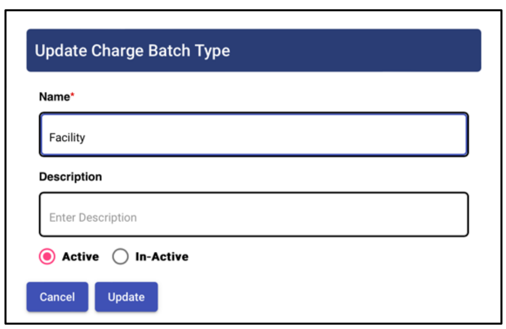


Figure 76.2: Edit/Update Charge Batch Type

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:

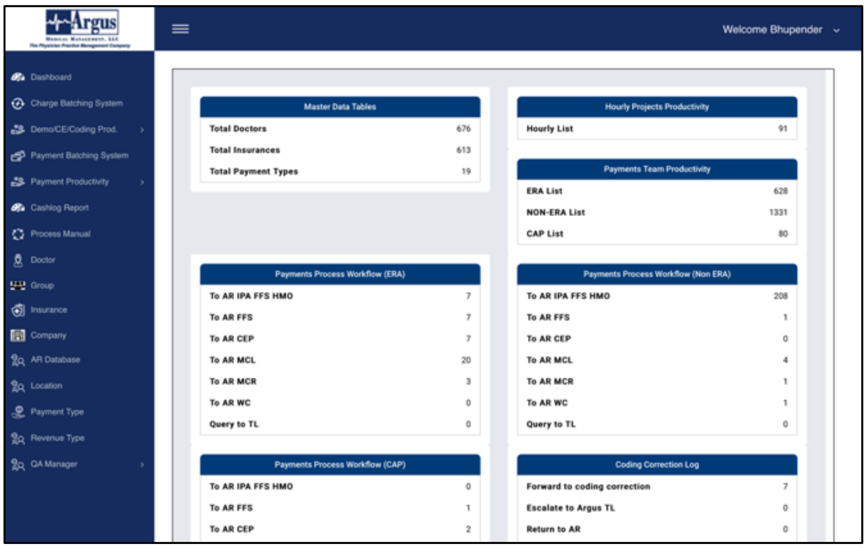


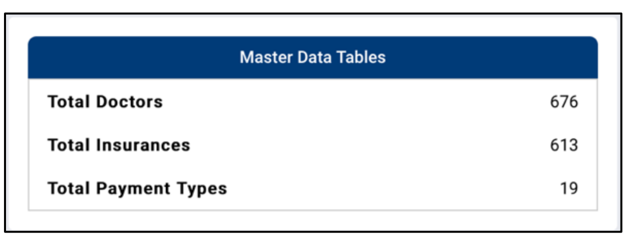
Figure no: User Section-Dashboard

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.

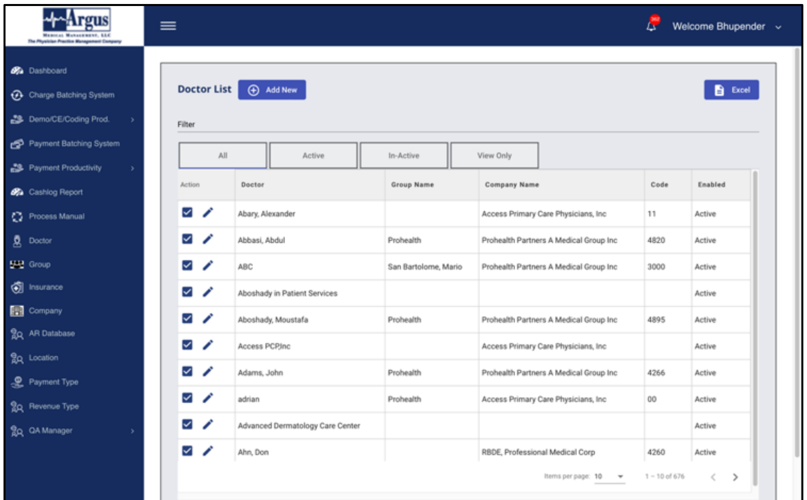


Figure no: Total Doctor

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.

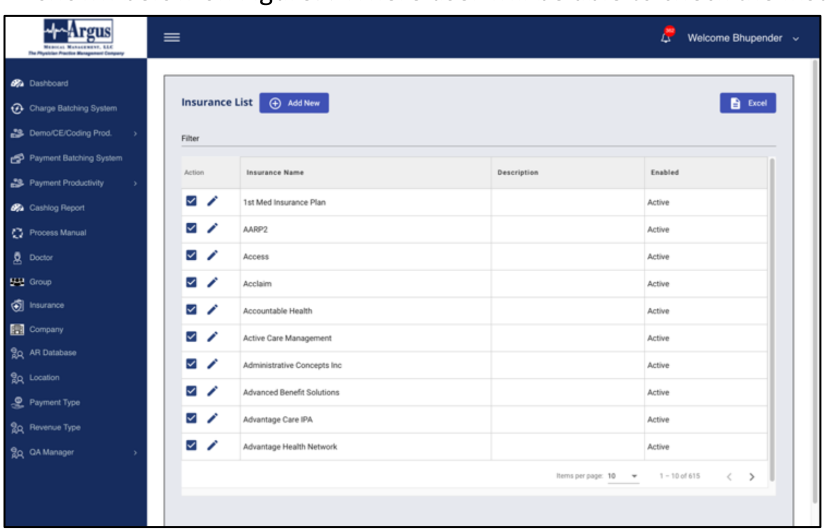


Figure no: Total Insurance

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.

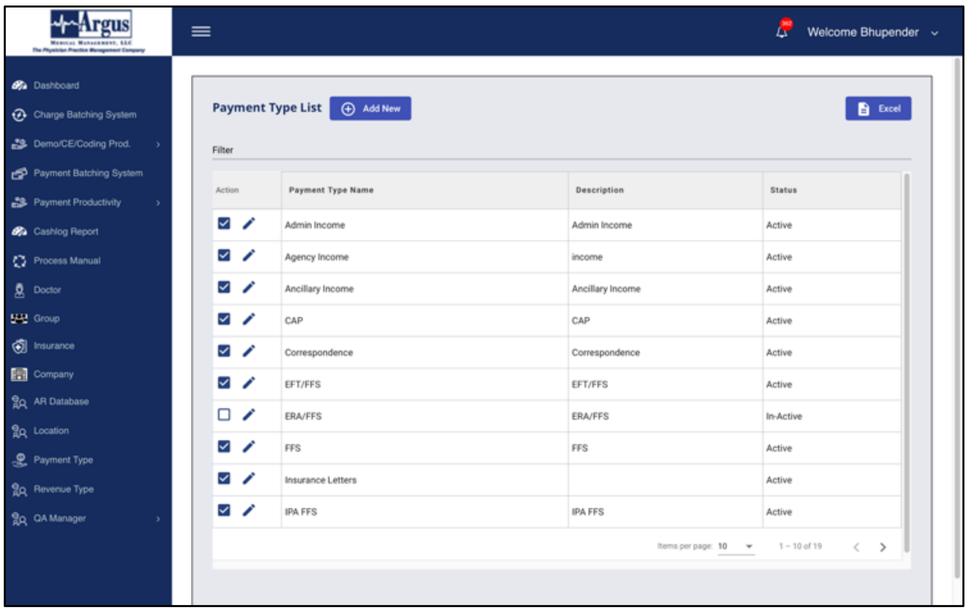


Figure no: Total Payment Types

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

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

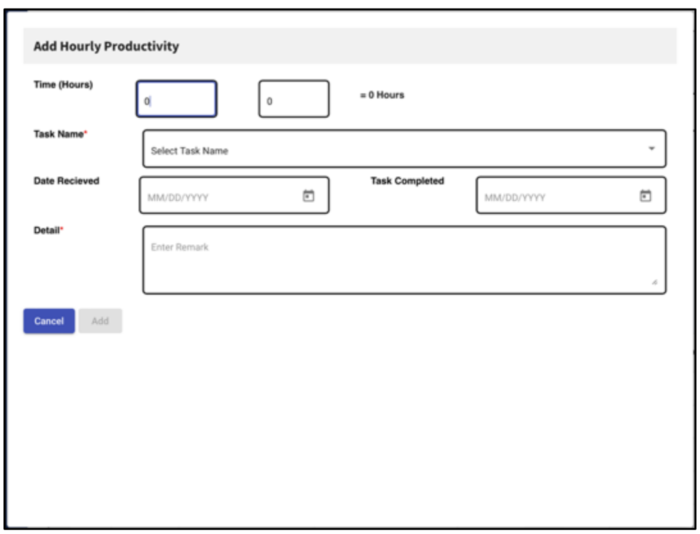


Figure : Add Hourly Productivity

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.

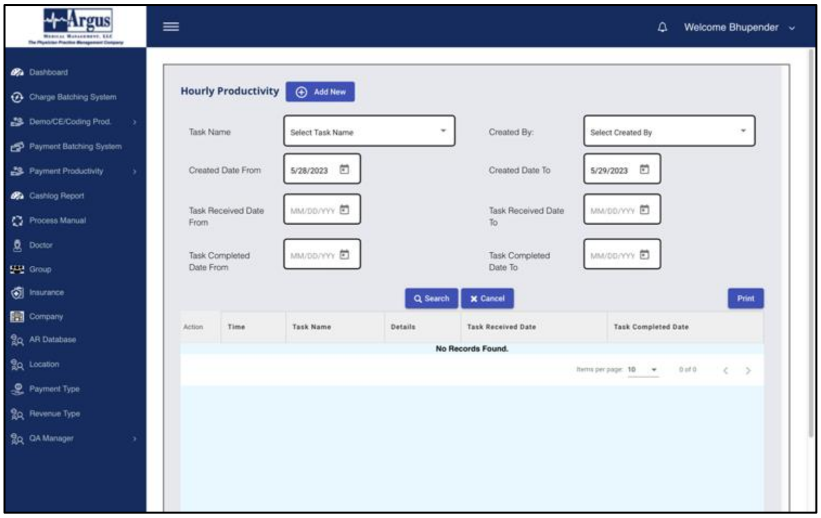


Figure no: Hourly Productivity

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.

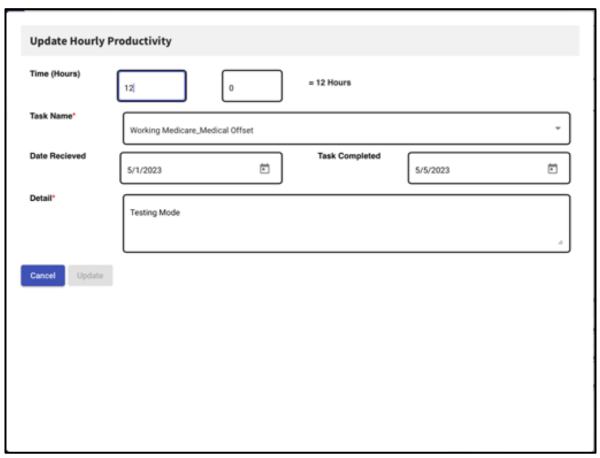


Figure : Edit/Update Hourly Productivity

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: .

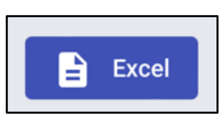


Figure no: Excel Sheet Icon

ID	Task Name	Hourly Task Name	Minutes	Hours	Time	Detail	Created By	Created On	Date Receive	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

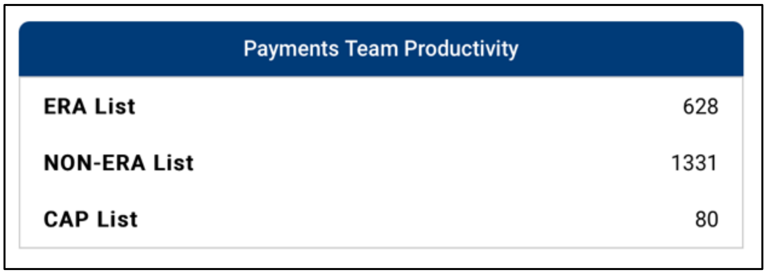


Figure no: Payments Team Productivity

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.

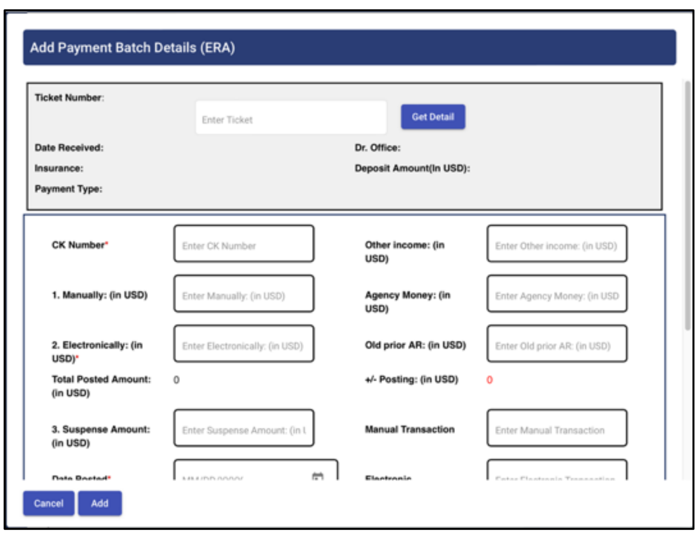


Figure : Add Payment Batch Details (ERA)

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.

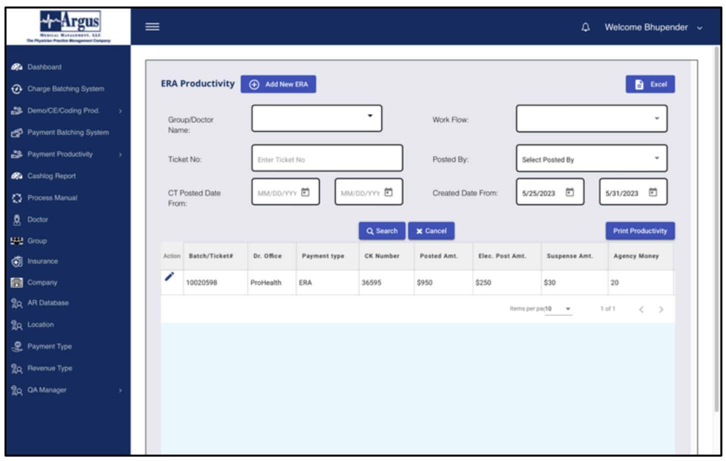


Figure no: ERA Productivity

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.

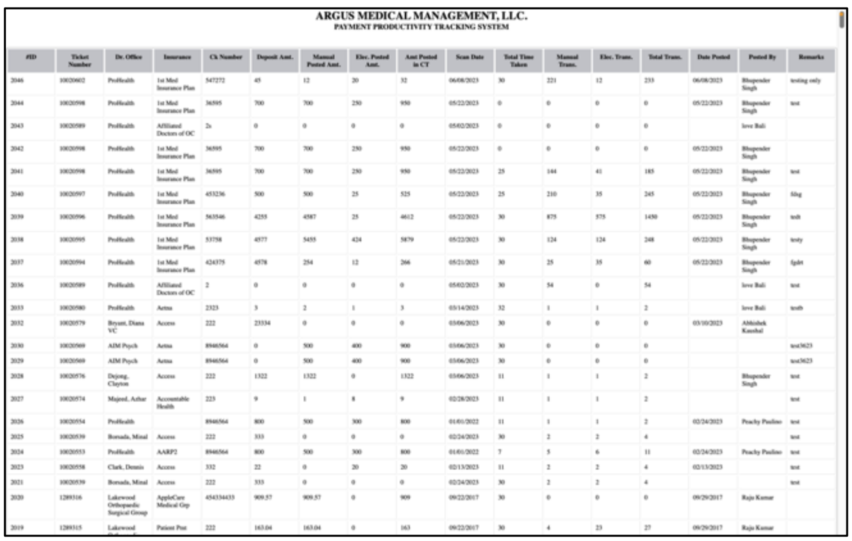
Figure .: Edit/Update Payment Batch Details (ERA)– Action

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	Ck Number	Deposit Amt.	Manual Posted Amt.	Elec. Posted Amt.	Amt Posted in CT	Scan 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	06/08/2023	30	221	12	233	06/08/2023	Bhupender Singh	testing only
2044	10020598	ProHealth	1st Med Insurance Plan	36595	700	700	250	950	05/22/2023	0	0	0	0	05/22/2023	Bhupender Singh	test
2043	10020589	ProHealth	Affiliated Doctors of OC	2s	0	0	0	0	05/02/2023	0	0	0	0		love Bali	
2042	10020598	ProHealth	1st Med Insurance Plan	36595	700	700	250	950	05/22/2023	0	0	0	0	05/22/2023	Bhupender Singh	
2041	10020598	ProHealth	1st Med Insurance Plan	36595	700	700	250	950	05/22/2023	25	144	41	185	05/22/2023	Bhupender Singh	test
2040	10020597	ProHealth	1st Med Insurance Plan	453236	500	500	25	525	05/22/2023	25	210	35	245	05/22/2023	Bhupender Singh	fdsg
2039	10020596	ProHealth	1st Med Insurance Plan	563546	4255	4587	25	4612	05/22/2023	30	875	575	1450	05/22/2023	Bhupender Singh	tedt
2038	10020595	ProHealth	1st Med Insurance Plan	53758	4577	5455	424	5879	05/22/2023	30	124	124	248	05/22/2023	Bhupender Singh	testy
2037	10020594	ProHealth	1st Med Insurance Plan	424375	4578	254	12	266	05/21/2023	30	25	35	60	05/22/2023	Bhupender Singh	fgdrt
2036	10020589	ProHealth	Affiliated Doctors of OC	2	0	0	0	0	05/02/2023	30	54	0	54		love Bali	test
2033	10020580	ProHealth	Aetna	2323	3	2	1	3	03/14/2023	32	1	1	2		love Bali	testh
2032	10020579	Bryant, Diana VC	Access	222	23334	0	0	0	03/06/2023	30	0	0	0	03/10/2023	Abhishek Kaushal	
2030	10020569	AIM Psych	Aetna	8946564	0	500	400	900	03/06/2023	30	0	0	0			test3623
2029	10020569	AIM Psych	Aetna	8946564	0	500	400	900	03/06/2023	30	0	0	0			test3623
2028	10020576	Dejong, Clayton	Access	222	1322	1322	0	1322	03/06/2023	11	1	1	2		Bhupender Singh	test
2027	10020574	Majeed, Azhar	Accountable Health	223	9	1	8	9	02/28/2023	11	1	1	2			test
2026	10020554	ProHealth		8946564	800	500	300	800	01/01/2022	11	1	1	2	02/24/2023	Peachy Paulino	test
2025	10020539	Borsada, Minal	Access	222	333	0	0	0	02/24/2023	30	2	2	4			test
2024	10020553	ProHealth	AARP2	8946564	800	500	300	800	01/01/2022	7	5	6	11	02/24/2023	Peachy Paulino	test
2023	10020558	Clark, Dennis	Access	332	22	0	20	20	02/13/2023	11	2	2	4	02/13/2023		test
2021	10020539	Borsada, Minal	Access	222	333	0	0	0	02/24/2023	30	2	2	4			test
2020	1289316	Lakewood Orthopaedic Surgical Group	AppleCare Medical Grp	454334433	909.57	909.57	0	909	09/22/2017	30	0	0	0	09/29/2017	Raju Kumar	
2019	1289315	Lakewood	Patient Pmt	222	163.04	163.04	0	163	09/22/2017	30	4	23	27	09/29/2017	Raju Kumar	

Figure no: Print Productivity

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

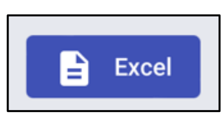


Figure no: Excel Sheet- Icon

ID	Batch ID	Scan Date	Chk Number	Electronicall	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 Kum	08/11/2023	Umesh Kum	08/11/2023
2049	10020674	08/11/2023	54986498	320	520	1	0	test	30	Kelley Whe	Bhupender S	08/11/2023	null null	
2048	10020608	06/08/2023	78676	1111	1	2	0	1	1	Ashkan Am	Bhupender S	06/21/2023	null null	
2047	10020518	02/13/2023	5856562758	0	0	2	0		40	Cynthia Che	Bhupender S	06/21/2023	Bhupender S	07/19/2023
2046	10020602	06/08/2023	547272	12	221	1	1	testing g	31	Ashkan Am	Umesh Kum	06/08/2023	lucky pay	07/28/2023
2045	10020599	05/23/2023	21	1	3	3	0	test	1	Theodore Z	Umesh Kum	05/26/2023	Umesh Kum	07/19/2023
2044	10020598	05/22/2023	36595	0	0	1	0	test	30	Ashkan Am	Bhupender S	05/26/2023	null null	
2043	10020589	05/02/2023	2s	0	0	1	0		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		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	
2040	10020597	05/22/2023	453236	35	210	1	0	fdsg	25	Ashkan Am	Bhupender S	05/22/2023	null null	
2039	10020596	05/22/2023	563546	575	875	1	0	tedt	30	Ashkan Am	Bhupender S	05/22/2023	null null	
2038	10020595	05/22/2023	53758	124	124	1	0	testy	30	Ashkan Am	Bhupender S	05/22/2023	null null	
2037	10020594	05/21/2023	424375	35	25	1	0	fgdrt	30	Ashkan Am	Bhupender S	05/22/2023	null null	
2036	10020589	05/02/2023	2	0	54	1	1	test	30	Ashkan Am	Bhupender S	05/11/2023	null null	
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		30	MD Victor W	Bhupender S	03/06/2023	null null	
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	
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 H	Bhupender S	02/28/2023	Bhupender S	03/03/2023
2026	10020554	01/01/2022	8946564	1	1	1	0	test	11	Ashkan Am	Bhupender S	02/27/2023	Bhupender S	02/27/2023
2025	10020539	02/24/2023	222	2	2	1	0	test	30	MD Kee Bin I	Bhupender S	02/27/2023	null null	
2024	10020553	01/01/2022	8946564	6	5	1	0	test	7	Ashkan Am	Bhupender S	02/27/2023	Bhupender S	02/27/2023
2023	10020558	02/13/2023	332	2	2	1	0	test	11	NP April M N	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	
2020	1289316	09/22/2017	454334433	0	0	1	0		30	Paul Chang I	null null	02/24/2023	null null	
2019	1289315	09/22/2017	222	23	4	1	0		30	Paul Chang I	Bhupender S	02/23/2023	null null	02/24/2023
2018	1289315	09/22/2017	3243232341	23	0	1	0		30	Paul Chang I	null null	02/23/2023	null null	
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		30	Soyoung Y Y	null 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	
2014	10020528	02/17/2023	22456767	0	0	1	0	Test 11	30	Ghazaleh B	null null	02/17/2023	null null	
2013	10020519	02/13/2023	423	0	0	1	0	Test	30	Jackson Che	null null	02/17/2023	null null	02/24/2023

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

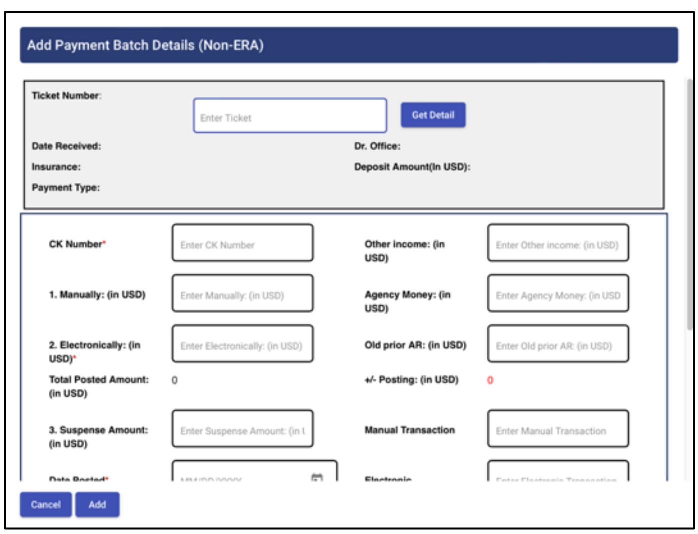


Figure : Add Payment Batch Details (Non-ERA)

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.

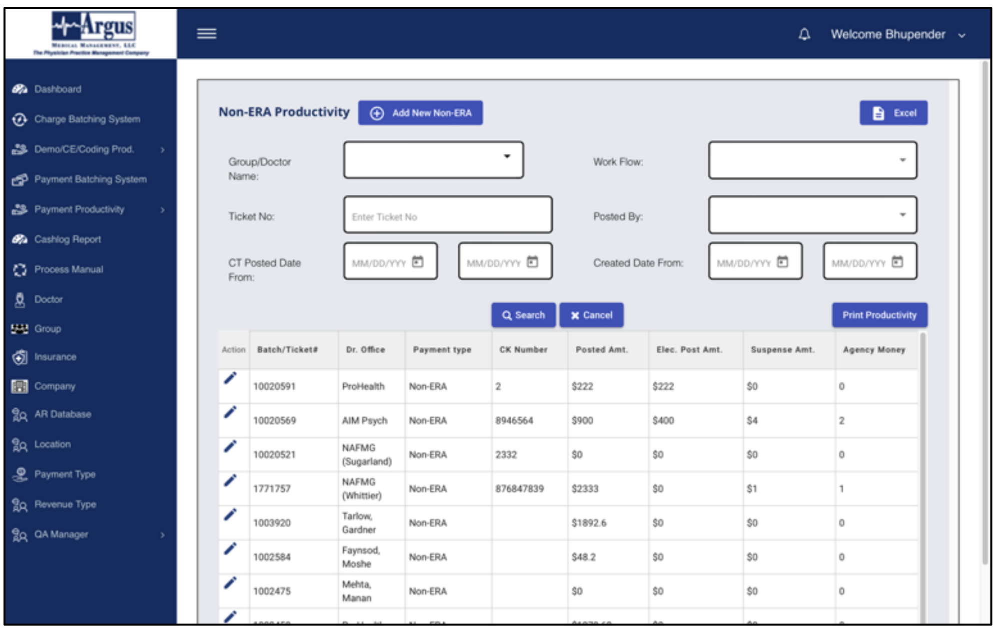


Figure no: Non-ERA Productivity

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.

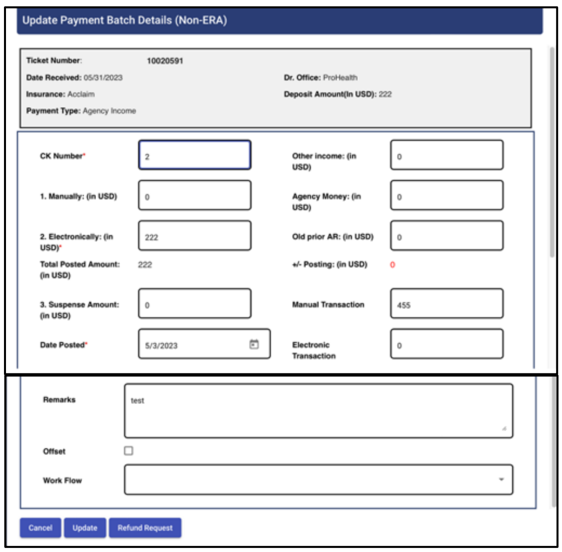


Figure .: Edit/Update Payment Batch Details (Non-ERA)– Action

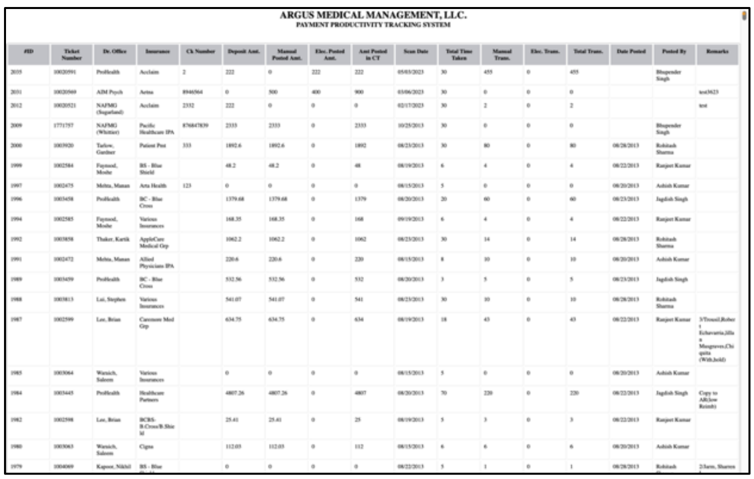
After Editing/Updating the Edit/Update Payment Batch Details (ERA), User needs to click on "Update" to confirm the changes & if User clicks on "Cancel" option for any changes made will be discarded.

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	Insurance	Ck Number	Deposit Amt.	Manual Posted Amt.	Elec. Posted Amt.	Amt Posted in CT	Scan Date	Total Time Taken	Manual Trans.	Elec. Trans.	Total Trans.	Date Posted	Posted By	Remarks

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: .

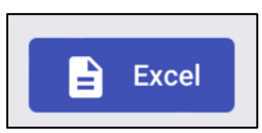


Figure no: Excel Sheet – Icon

ID	Batch ID	Scan Date	Chk Number	Electronicall	Manual Tran	Payment Pro	Is Offset	Remark	Time	Doctor	Created By	Created On	Modified By	Modified On
2035	10020591	2023-05-03T	2	0	455	2	1		30	ProHealth	Bhupender Singh	2023/05/11	null null	1970/01/01
2031	10020569	2023-03-06T	8946564	0	0	2	0	test3623	30	AIM Psych	Bhupender Singh	2023/03/06	Bhupender S	2023/03/06
2012	10020521	2023-02-17T	2332	0	2	2	0	test	30	NAFMG (Sugarland)	Bhupender Singh	2023/02/17	null null	2023/02/23
2009	1771757	2013-10-25T	876847839	0	0	2	0		30	NAFMG (Whittier)	Bhupender Singh	2023/02/10	Bhupender S	1970/01/01
2000	1003920	2013-08-23T	333	0	80	2	0		30	Tarlow, Gardner	Bhupender Singh	2013/09/09	Bhupender S	2023/02/13
1999	1002584	2013-08-19T00:00:00.000Z			4	2	0		6	Faynsod, Moshe	Ranjeet Kumar	2013/09/09	null null	1970/01/01
1997	1002475	2013-08-15T	123	0	0	2	0		5	Mehta, Manan	Bhupender Singh	2013/09/09	Bhupender S	2023/02/13
1996	1003458	2013-08-20T00:00:00.000Z			60	2	0		20	ProHealth	Jagdish Singh	2013/09/09	null null	1970/01/01
1994	1002585	2013-09-19T00:00:00.000Z			4	2	0		6	Faynsod, Moshe	Ranjeet Kumar	2013/09/09	null null	1970/01/01
1992	1003858	2013-08-23T00:00:00.000Z			14	2	0		30	Thaker, Kartik	Rohitash Sharma	2013/09/09	null null	1970/01/01
1991	1002472	2013-08-15T00:00:00.000Z			10	2	0		8	Mehta, Manan	Ashish Kumar	2013/09/09	null null	1970/01/01
1989	1003459	2013-08-20T00:00:00.000Z			5	2	0		3	ProHealth	Jagdish Singh	2013/09/09	null null	1970/01/01
1988	1003813	2013-08-23T00:00:00.000Z			10	2	0		30	Lui, Stephen	Rohitash Sharma	2013/09/09	null null	1970/01/01
1987	1002599	2013-08-19T00:00:00.000Z			43	2	0	3/Trousil,Rol	18	Lee, Brian	Ranjeet Kumar	2013/09/09	null null	1970/01/01
1985	1003064	2013-08-15T00:00:00.000Z			0	2	0		5	Waraich, Saleem	Ashish Kumar	2013/09/09	null null	1970/01/01
1984	1003445	2013-08-20T00:00:00.000Z			220	2	0	Copy to AR(i	70	ProHealth	Jagdish Singh	2013/09/09	null null	1970/01/01
1982	1002598	2013-08-19T00:00:00.000Z			3	2	0		5	Lee, Brian	Ranjeet Kumar	2013/09/09	null null	1970/01/01
1980	1003063	2013-08-15T00:00:00.000Z			6	2	0		6	Waraich, Saleem	Ashish Kumar	2013/09/09	null null	1970/01/01
1979	1004069	2013-08-22T00:00:00.000Z			1	2	0	2/Jarm, Shar	5	Kapoor, Nikhil	Rohitash Sharma	2013/09/09	null null	1970/01/01
1978	1003421	2013-08-20T00:00:00.000Z			375	2	0	Copy to AR(i	140	ProHealth	Jagdish Singh	2013/09/09	null null	1970/01/01
1976	1002604	2013-08-19T00:00:00.000Z			30	2	0		10	Lui, Stephen	Ranjeet Kumar	2013/09/09	null null	1970/01/01
1975	1003062	2013-08-15T00:00:00.000Z			4	2	0		5	Waraich, Saleem	Ashish Kumar	2013/09/09	null null	1970/01/01
1973	1004281	2013-08-23T00:00:00.000Z			6	2	0		30	United Hospitalist Inc	Rohitash Sharma	2013/09/09	null null	1970/01/01
1972	1002603	2013-08-19T00:00:00.000Z			4	2	0		10	Lui, Stephen	Ranjeet Kumar	2013/09/09	null null	1970/01/01
1970	1003420	2013-08-20T00:00:00.000Z			50	2	0		15	ProHealth	Jagdish Singh	2013/09/09	null null	1970/01/01
1968	1004280	2013-08-23T00:00:00.000Z			8	2	0		30	United Hospitalist Inc	Rohitash Sharma	2013/09/09	null null	1970/01/01
1967	1004279	2013-08-23T00:00:00.000Z			14	2	0	$1076.51 not	30	United Hospitalist Inc	Rohitash Sharma	2013/09/09	null null	1970/01/01
1965	1003419	2013-08-20T00:00:00.000Z			30	2	0		15	ProHealth	Jagdish Singh	2013/09/09	null null	1970/01/01
1963	1002601	2013-08-19T00:00:00.000Z			6	2	0		5	Lui, Stephen	Ranjeet Kumar	2013/09/09	null null	1970/01/01
1962	1004320	2013-08-23T00:00:00.000Z			0	2	0	Dup Pmt $28	5	Bridges, Duane	Rohitash Sharma	2013/09/09	null null	1970/01/01
1959	1002591	2013-08-19T00:00:00.000Z			5	2	0		8	Hong, Andy	Ranjeet Kumar	2013/09/09	null null	1970/01/01
1956	1004261	2013-08-23T00:00:00.000Z			5	2	0		30	Waraich, Saleem	Rohitash Sharma	2013/09/09	null null	1970/01/01
1954	1002589	2013-08-19T00:00:00.000Z			0	2	0		30	Hong, Andy	Ranjeet Kumar	2013/09/09	null null	1970/01/01
1953	1004263	2013-08-23T00:00:00.000Z			1	2	0		30	Valerius Med Grp VC	Rohitash Sharma	2013/09/09	null null	1970/01/01
1951	1004262	2013-08-23T00:00:00.000Z			3	2	0		30	Valerius Med Grp VC	Rohitash Sharma	2013/09/09	null null	1970/01/01
1950	1004283	2013-08-23T00:00:00.000Z			2	2	0		30	Strauss, Michael	Rohitash Sharma	2013/09/09	null null	1970/01/01
1948	1004284	2013-08-23T00:00:00.000Z			2	2	0		30	Young, Harding	Rohitash Sharma	2013/09/09	null null	1970/01/01
1947	1002588	2013-08-19T00:00:00.000Z			4	2	0		5	Hong, Andy	Ranjeet Kumar	2013/09/09	null null	1970/01/01

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.

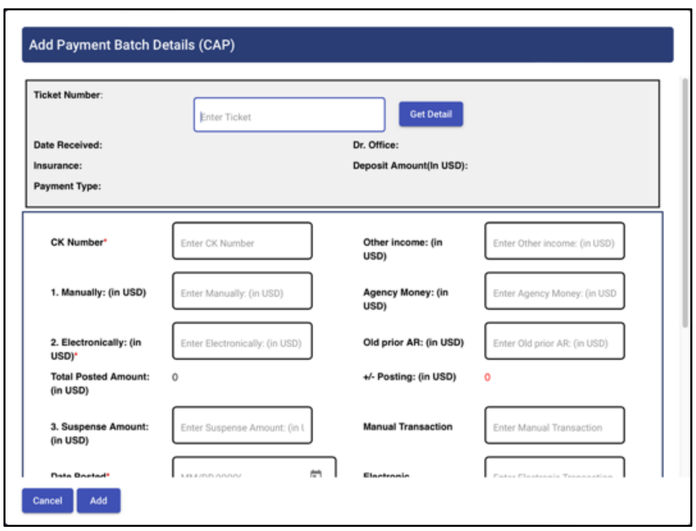


Figure : Add Payment Batch Details (CAP)

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.

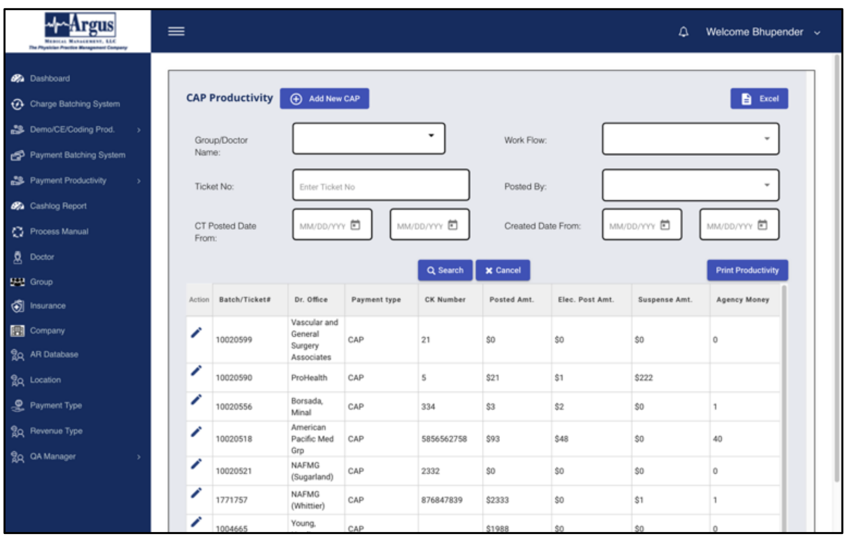


Figure no: CAP Productivity

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.

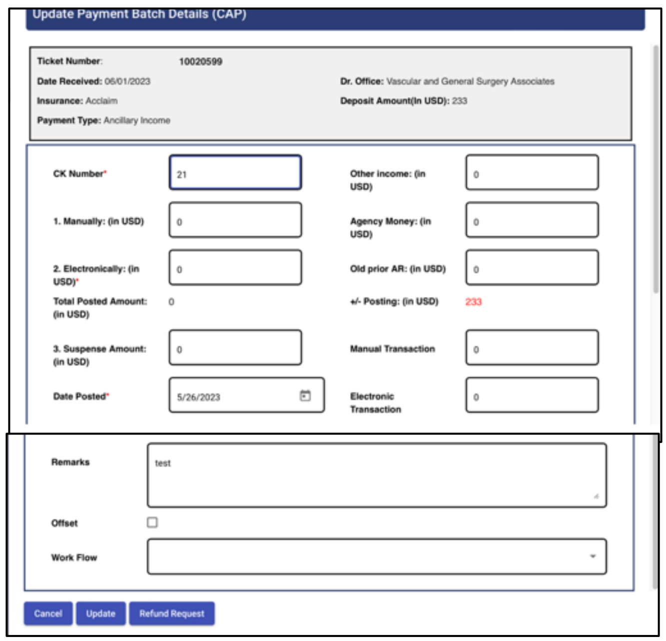


Figure .: Edit/Update Payment Batch Details (CAP)– Action

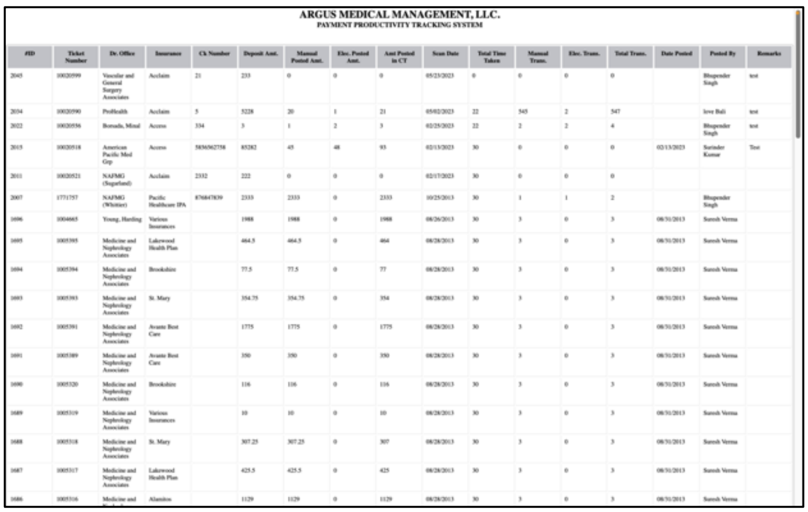
After Editing/Updating the Edit/Update Payment Batch Details (CAP), User needs to click on "Update" to confirm the changes & if User clicks on "Cancel" option for any changes made will be discarded.

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	Ticket Number	Dr. Office	Insurance	Ck Number	Deposit Amt.	Manual Posted Amt.	Elec. Posted Amt.	Amt Posted in CT	Scan Date	Total Time Taken	Manual Trans.	Elec. Trans.	Total Trans.	Date Posted	Posted By	Remarks
2045	10020599	Vascular and General Surgery Associates	Acclaim	21	233	0	0	0	05/23/2023	0	0	0	0		Bhupender Singh	test
2034	10020590	ProHealth	Acclaim	5	5228	20	1	21	05/02/2023	22	545	2	547		love Bali	test
2022	10020556	Bonada, Minal	Access	334	3	1	2	3	02/25/2023	22	2	2	4		Bhupender Singh	test
2015	10020518	American Pacific Med Grp	Access	5856562758	85282	45	48	93	02/13/2023	30	0	0	0	02/13/2023	Surinder Kumar	Test
2011	10020521	NAFMG (Sugarland)	Acclaim	2332	222	0	0	0	02/17/2023	30	0	0	0			
2007	1771757	NAFMG (Whittier)	Pacific Healthcare IPA	876847839	2333	2333	0	2333	10/25/2013	30	1	1	2		Bhupender Singh	
1696	1004665	Young, Harding	Various Insurances		1988	1988	0	1988	08/26/2013	30	3	0	3	08/31/2013	Suresh Verma	
1695	1005395	Medicine and Nephrology Associates	Lakewood Health Plan		464.5	464.5	0	464	08/28/2013	30	3	0	3	08/31/2013	Suresh Verma	
1694	1005394	Medicine and Nephrology Associates	Brookshire		77.5	77.5	0	77	08/28/2013	30	3	0	3	08/31/2013	Suresh Verma	
1693	1005393	Medicine and Nephrology Associates	St. Mary		354.75	354.75	0	354	08/28/2013	30	3	0	3	08/31/2013	Suresh Verma	
1692	1005391	Medicine and Nephrology Associates	Avante Best Care		1775	1775	0	1775	08/28/2013	30	3	0	3	08/31/2013	Suresh Verma	
1691	1005389	Medicine and Nephrology Associates	Avante Best Care		350	350	0	350	08/28/2013	30	3	0	3	08/31/2013	Suresh Verma	
1690	1005320	Medicine and Nephrology Associates	Brookshire		116	116	0	116	08/28/2013	30	3	0	3	08/31/2013	Suresh Verma	
1689	1005319	Medicine and Nephrology Associates	Various Insurances		10	10	0	10	08/28/2013	30	3	0	3	08/31/2013	Suresh Verma	
1688	1005318	Medicine and Nephrology Associates	St. Mary		307.25	307.25	0	307	08/28/2013	30	3	0	3	08/31/2013	Suresh Verma	
1687	1005317	Medicine and Nephrology Associates	Lakewood Health Plan		425.5	425.5	0	425	08/28/2013	30	3	0	3	08/31/2013	Suresh Verma	
1686	1005316	Medicine and	Alamitos		1129	1129	0	1129	08/28/2013	30	3	0	3	08/31/2013	Suresh 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: .

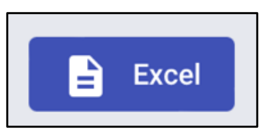


Figure no: Excel Sheet – Icon

ID	Batch ID	Scan Date	Chk Number	Electronicall	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		Vascular and General Surgery Associates	Bhupender Singh	2023/05/26	null null	1970/01/01
2034	10020590	2023-05-02T00:00:00.000Z	5	2	545	3	1	test	22	ProHealth	love Bali	2023/05/11	love Bali	2023/05/26
2022	10020556	2023-02-25T00:00:00.000Z	334	2	2	3	0	test	22	Borsada, Minal	Bhupender Singh	2023/02/25	Bhupender Singh	2023/03/06
2015	10020518	2023-02-13T00:00:00.000Z	5856562758	0	0	3	0	Test	30	American Pacific Med Grp	Bhupender Singh	2023/02/17	Bhupender Singh	1970/01/01
2011	10020521	2023-02-17T00:00:00.000Z	2332	0	0	3	0		30	NAFMG (Sugarland)	Bhupender Singh	2023/02/17	null null	1970/01/01
2007	1771757	2013-10-25T00:00:00.000Z	876847839	1	1	3	0		30	NAFMG (Whittier)	Bhupender Singh	2023/02/10	Bhupender Singh	2023/03/10
1696	1004665	2013-08-26T00:00:00.000Z			3	3	0		30	Young, Harding	Suresh Verma	2013/09/03	null null	1970/01/01
1695	1005395	2013-08-28T00:00:00.000Z			3	3	0		30	Medicine and Nephrology Associates	Suresh Verma	2013/09/03	null null	1970/01/01
1694	1005394	2013-08-28T00:00:00.000Z			3	3	0		30	Medicine and Nephrology Associates	Suresh Verma	2013/09/03	null null	1970/01/01
1693	1005393	2013-08-28T00:00:00.000Z			3	3	0		30	Medicine and Nephrology Associates	Suresh Verma	2013/09/03	null null	1970/01/01
1692	1005391	2013-08-28T00:00:00.000Z			3	3	0		30	Medicine and Nephrology Associates	Suresh Verma	2013/09/03	null null	1970/01/01
1691	1005389	2013-08-28T00:00:00.000Z			3	3	0		30	Medicine and Nephrology Associates	Suresh Verma	2013/09/03	null null	1970/01/01
1690	1005320	2013-08-28T00:00:00.000Z			3	3	0		30	Medicine and Nephrology Associates	Suresh Verma	2013/09/03	null null	1970/01/01
1689	1005319	2013-08-28T00:00:00.000Z			3	3	0		30	Medicine and Nephrology Associates	Suresh Verma	2013/09/03	null null	1970/01/01
1688	1005318	2013-08-28T00:00:00.000Z			3	3	0		30	Medicine and Nephrology Associates	Suresh Verma	2013/09/03	null null	1970/01/01
1687	1005317	2013-08-28T00:00:00.000Z			3	3	0		30	Medicine and Nephrology Associates	Suresh Verma	2013/09/03	null null	1970/01/01
1686	1005316	2013-08-28T00:00:00.000Z			3	3	0		30	Medicine and Nephrology Associates	Suresh Verma	2013/09/03	null null	1970/01/01
1685	1005315	2013-08-28T00:00:00.000Z			3	3	0		30	Medicine and Nephrology Associates	Suresh Verma	2013/09/03	null null	1970/01/01
1684	1005314	2013-08-28T00:00:00.000Z			3	3	0		30	Medicine and Nephrology Associates	Suresh Verma	2013/09/03	null null	1970/01/01
1683	1004867	2013-08-29T00:00:00.000Z			6	3	0		30	ProHealth	Suresh Verma	2013/09/03	null null	1970/01/01
1682	1004976	2013-08-28T00:00:00.000Z			6	3	0		30	ProHealth	Suresh Verma	2013/09/03	null null	1970/01/01
1681	1004956	2013-08-28T00:00:00.000Z			3	3	0		30	ProHealth	Suresh Verma	2013/09/03	null null	1970/01/01
1680	1004953	2013-08-27T00:00:00.000Z			3	3	0		30	ProHealth	Suresh Verma	2013/09/03	null null	1970/01/01
1679	1005090	2013-08-27T00:00:00.000Z			6	3	0		30	ProHealth	Suresh Verma	2013/09/03	null null	1970/01/01
1678	1005630	2013-08-29T00:00:00.000Z			3	3	0		30	American Pacific Med Grp	Suresh Verma	2013/09/03	null null	1970/01/01
1677	1005559	2013-08-29T00:00:00.000Z			3	3	0		30	Chen, Hsiao	Suresh Verma	2013/09/03	null null	1970/01/01
1676	1004945	2013-08-28T00:00:00.000Z			3	3	0		30	Shakhnovits, Marianna VC	Suresh Verma	2013/09/03	null null	1970/01/01
1675	1005180	2013-08-27T00:00:00.000Z			3	3	0		30	Young, Harding	Suresh Verma	2013/09/03	null null	1970/01/01
1674	1005176	2013-08-27T00:00:00.000Z			3	3	0		30	Young, Harding	Suresh Verma	2013/09/03	null null	1970/01/01
1673	1005174	2013-08-27T00:00:00.000Z			3	3	0		30	AppleCare Hospitalist Medical Group	Suresh Verma	2013/09/03	null null	1970/01/01
1672	1005171	2013-08-27T00:00:00.000Z			3	3	0		30	AppleCare Hospitalist Medical Group	Suresh Verma	2013/09/03	null null	1970/01/01
1671	1004591	2013-08-26T00:00:00.000Z			3	3	0		30	So, Vannarith	Suresh Verma	2013/09/03	null null	1970/01/01
1670	1004590	2013-08-26T00:00:00.000Z			3	3	0		30	So, Vannarith	Suresh Verma	2013/09/03	null null	1970/01/01
1669	1004593	2013-08-26T00:00:00.000Z			3	3	0		30	So, Vannarith	Suresh Verma	2013/09/03	null null	1970/01/01
1668	1004354	2013-08-26T00:00:00.000Z			26	3	0		30	NAFMG	Suresh Verma	2013/09/03	null null	1970/01/01
1667	1004772	2013-08-26T00:00:00.000Z			3	3	0		30	Hong, Andy	Suresh Verma	2013/09/03	null null	1970/01/01
1666	1004574	2013-08-26T00:00:00.000Z			3	3	0		30	So, Vannarith	Suresh Verma	2013/09/03	null null	1970/01/01
1665	1004596	2013-08-26T00:00:00.000Z			3	3	0		30	So, Vannarith	Suresh Verma	2013/09/03	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.

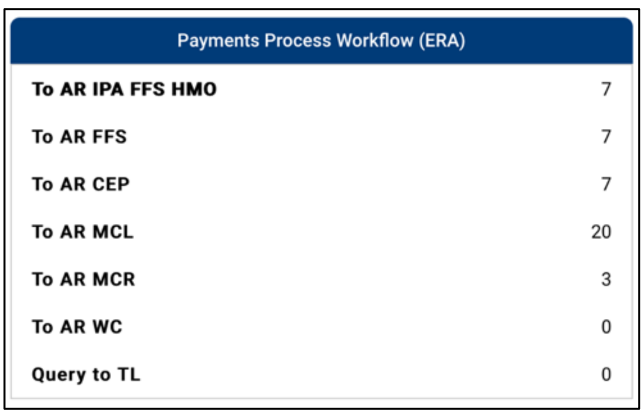


Figure no: Payments Process Workflow (ERA)

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.

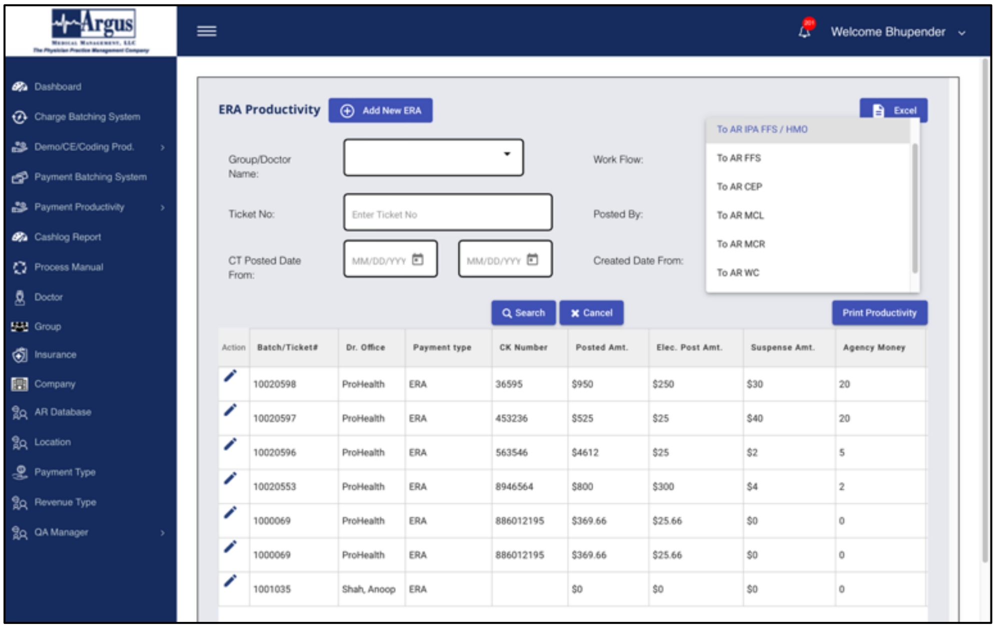


Figure no: ERA Productivity

➢ **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.

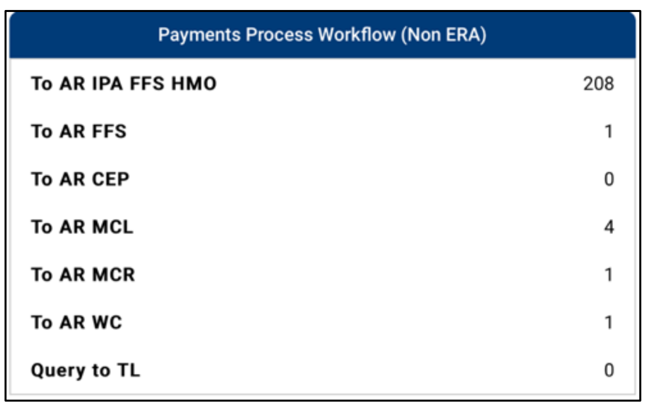


Figure no: Payments Process Workflow (Non-ERA)

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.

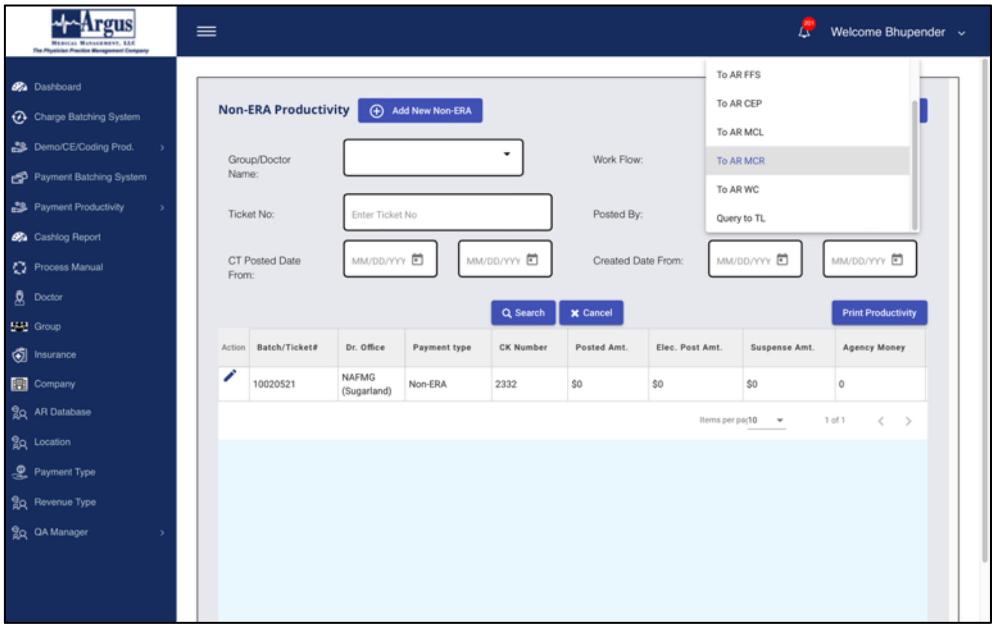


Figure no: Non-ERA Productivity

- **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.

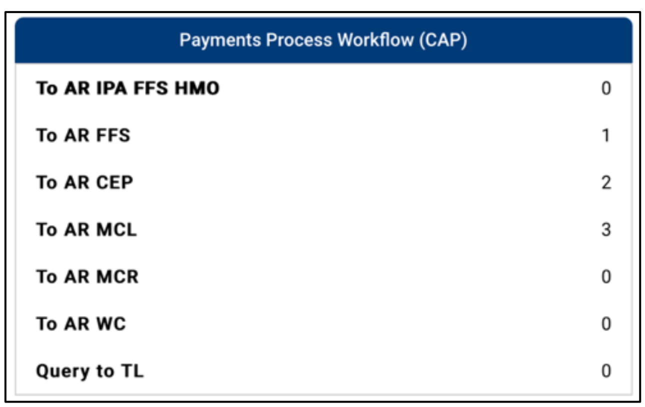


Figure no: Payments Process Workflow (CAP)

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.

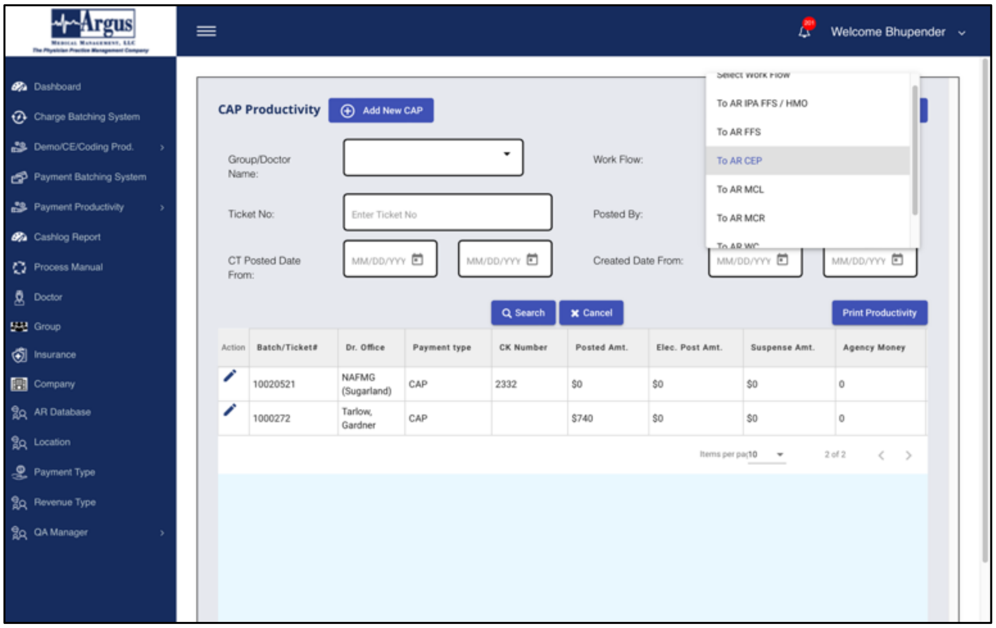


Figure no: CAP Productivity

➢ **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

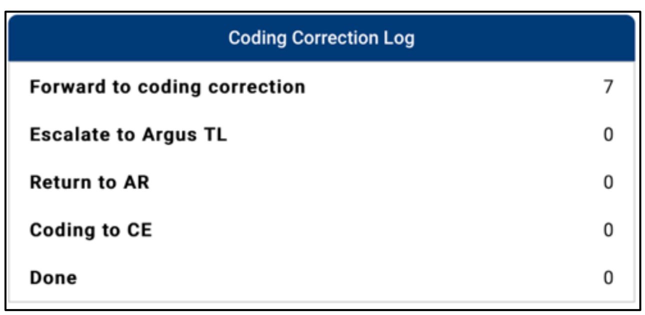


Figure no: Coding Correction Log

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.

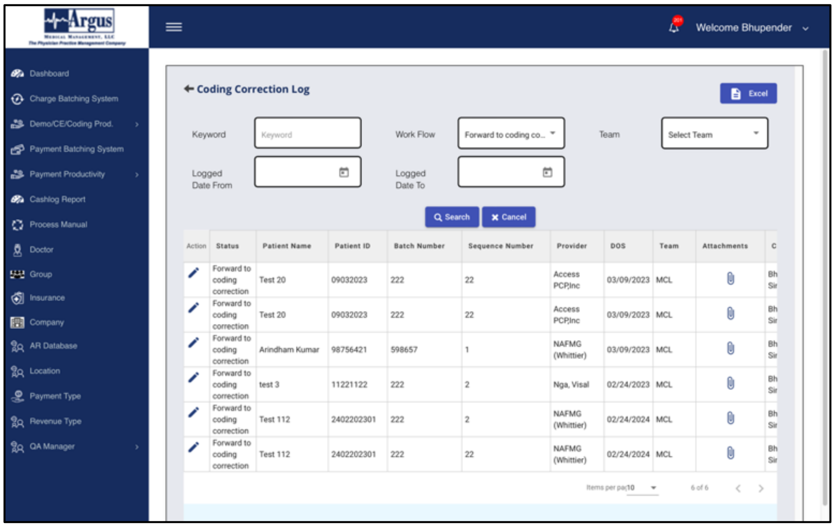


Figure no: Coding Correction Log

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.

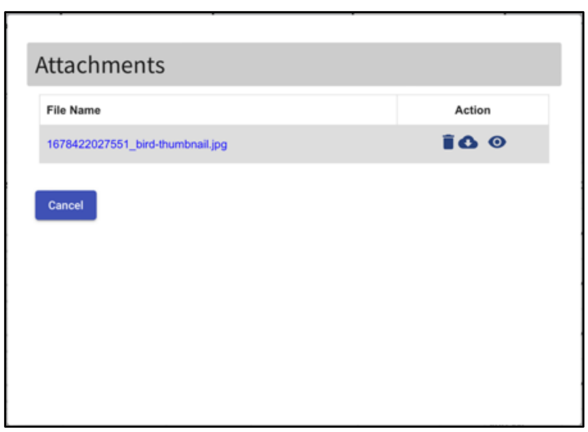


Figure no: Attachments

- 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.

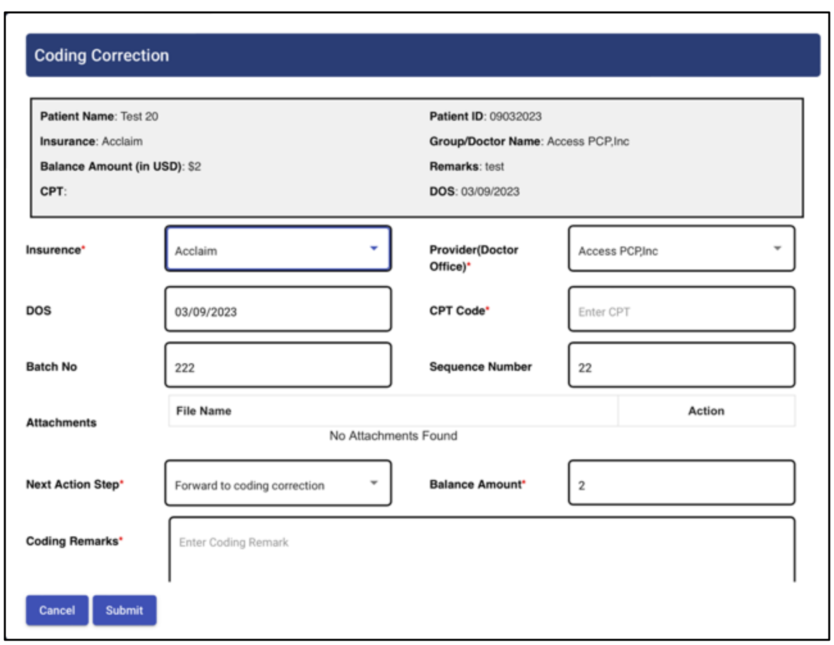


Figure .: Edit/Update Coding Correction– Action

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: .

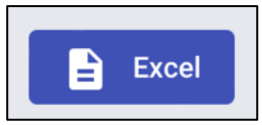
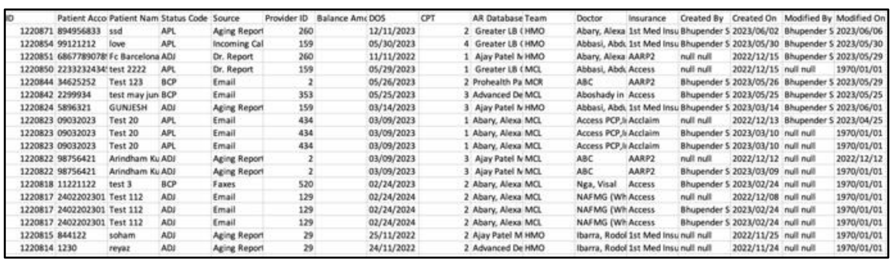


Figure no: Excel Sheet - Icon



ID	Patient Acco	Patient Nam	Status Code	Source	Provider ID	Balance Amc	DOS	CPT	AR Database	Team	Doctor	Insurance	Created By	Created On	Modified By	Modified On
1220871	894956833	ssd	APL	Aging Report	260		12/11/2023	2	Greater LB (	HMO	Abary, Alexa	1st Med Insu	Bhupender S	2023/06/02	Bhupender S	2023/06/06
1220854	99121212	love	APL	Incoming Cal	159		05/30/2023	4	Greater LB (	HMO	Abbasi, Abd	1st Med Insu	Bhupender S	2023/05/30	Bhupender S	2023/05/30
1220851	686778907	Fc Barcelona	ADJ	Dr. Report	260		11/11/2022	1	Ajay Patel N	HMO	Abary, Alexa	AARP2	null null	2022/12/15	Bhupender S	2023/05/29
1220850	223323243	test 2222	APL	Dr. Report	159		05/29/2023	1	Greater LB (	MCL	Abbasi, Abd	Access	null null	2022/12/15	null null	1970/01/01
1220844	34625252	Test 123	BCP	Email	2		05/26/2023	2	Prohealth Pa	MCR	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	Aboshady in	Access	Bhupender S	2023/05/25	Bhupender S	2023/05/25
1220824	5896321	GUNJESH	ADJ	Aging Report	159		03/14/2023	3	Ajay Patel N	HMO	Abbasi, Abd	1st Med Insu	Bhupender S	2023/03/14	Bhupender S	2023/06/01
1220823	09032023	Test 20	APL	Email	434		03/09/2023	1	Abary, Alexa	MCL	Access PCP,I	Acclaim	null null	2022/12/13	Bhupender S	2023/04/25
1220823	09032023	Test 20	APL	Email	434		03/09/2023	1	Abary, Alexa	MCL	Access PCP,I	Acclaim	Bhupender S	2023/03/10	null null	1970/01/01
1220823	09032023	Test 20	APL	Email	434		03/09/2023	1	Abary, Alexa	MCL	Access PCP,I	Acclaim	Bhupender S	2023/03/10	null null	1970/01/01
1220822	98756421	Arindham Ku	ADJ	Aging Report	2		03/09/2023	3	Ajay Patel N	MCL	ABC	AARP2	null null	2022/12/12	null null	2022/12/12
1220822	98756421	Arindham Ku	ADJ	Aging Report	2		03/09/2023	3	Ajay Patel N	MCL	ABC	AARP2	Bhupender S	2023/03/09	null null	1970/01/01
1220818	11221122	test 3	BCP	Faxes	520		02/24/2023	2	Abary, Alexa	MCL	Nga, Visal	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 (Wh	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 (Wh	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 (Wh	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.

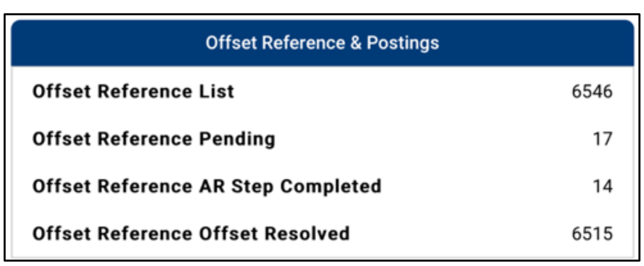


Figure no: Offset Reference & Postings

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.

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.

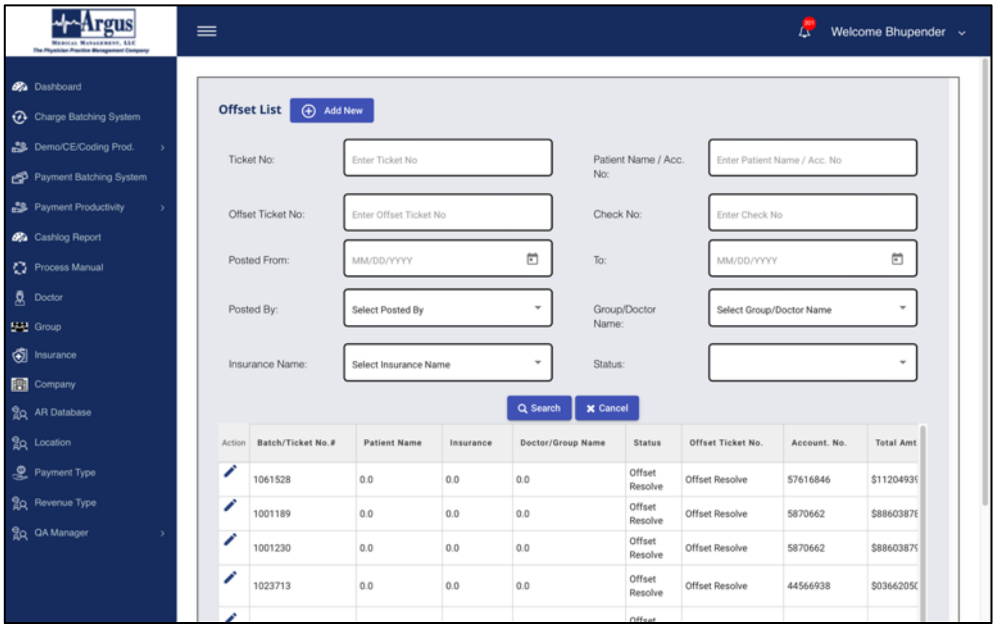


Figure no: Offset List

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.

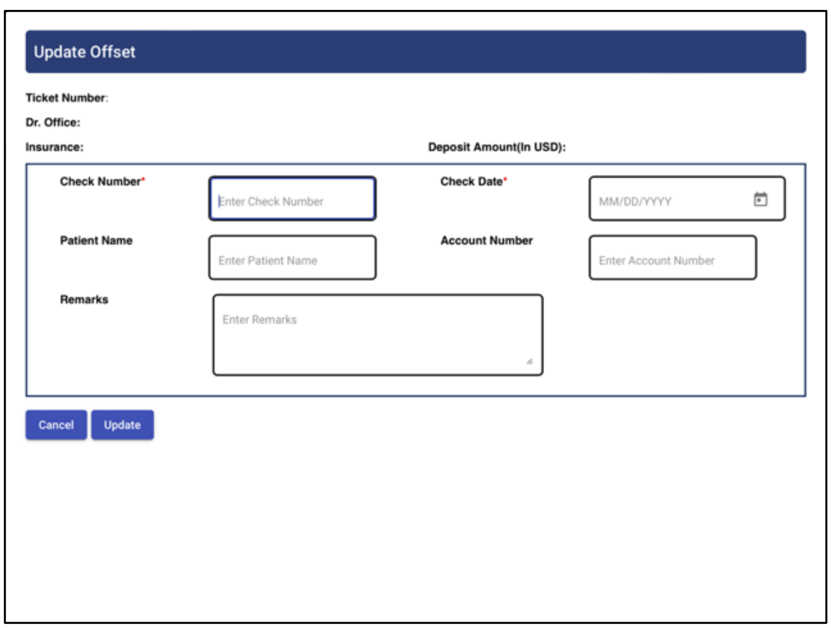


Figure .: Edit/Update Offset– Action

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.

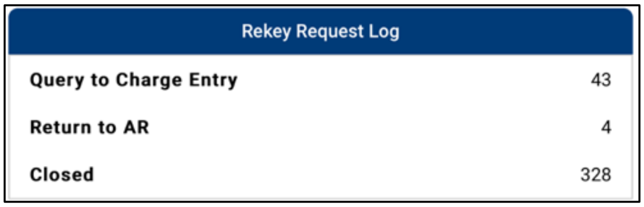


Figure no: Rekey Request Log

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.

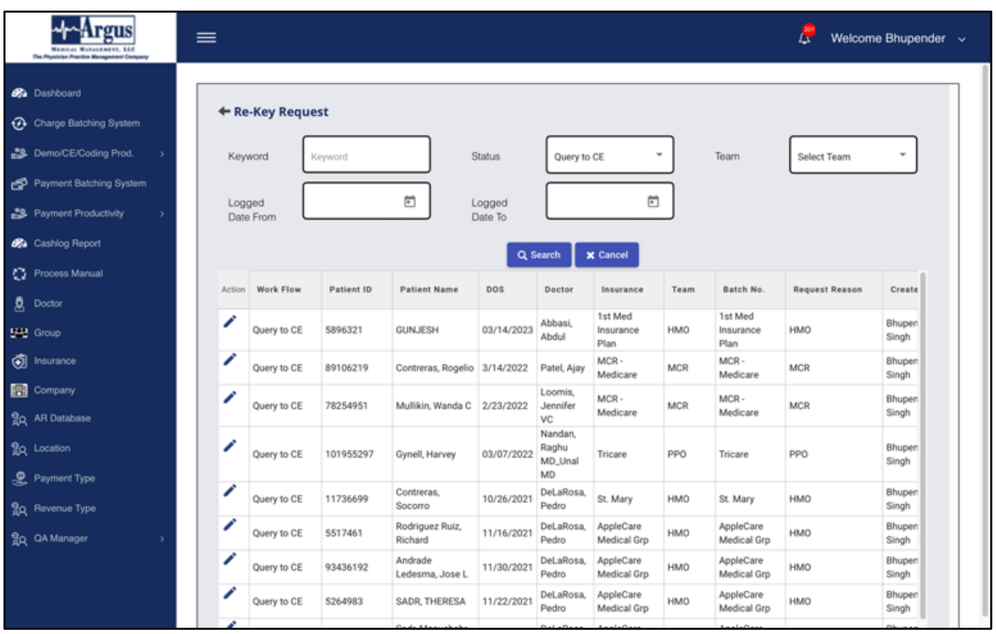


Figure no: Re-Key Request

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.

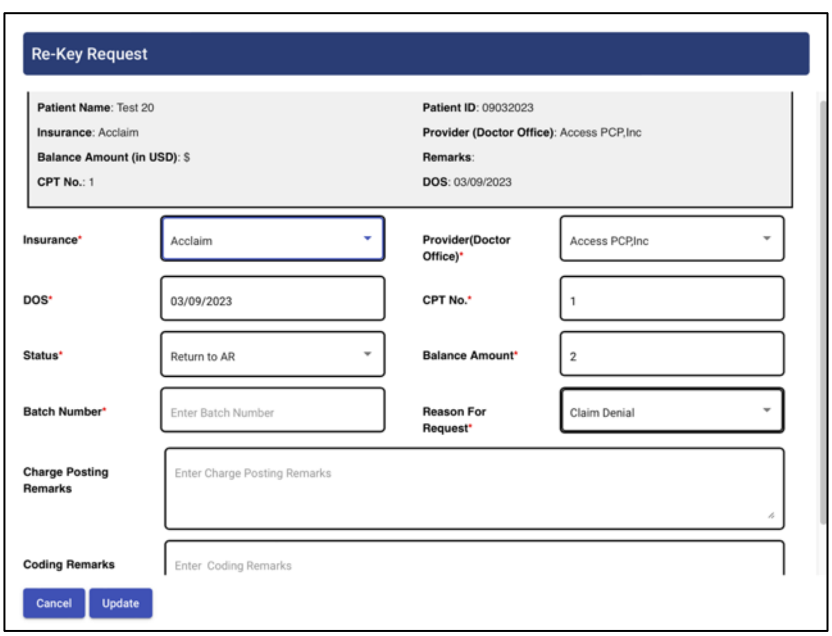


Figure .: Edit/Update Re-Key Request– Action

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.

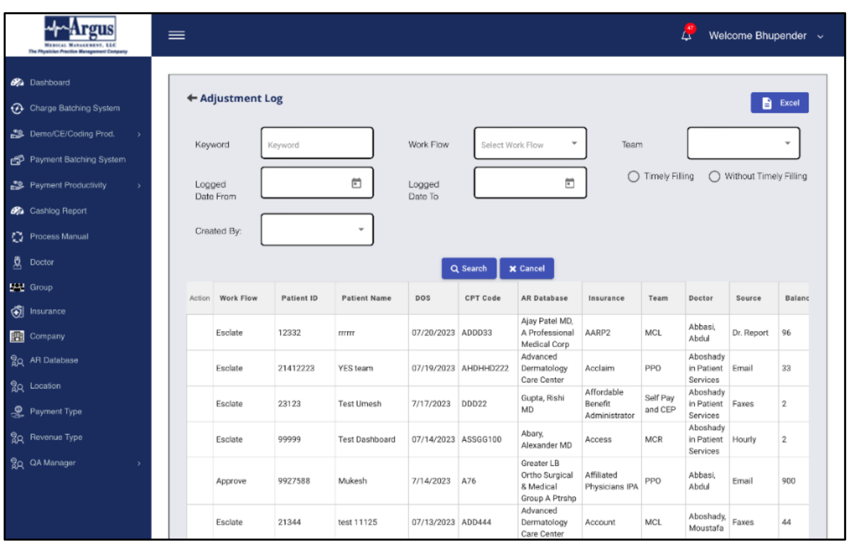
Adjustment Log	
Adjustment Log [List All]	1171
Timely Filing	0
Without Timely Filing	1160

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	Balanc
	Esclate	12332	rrrrrr	07/20/2023	ADDD33	Ajay Patel MD, A Professional Medical Corp	AARP2	MCL	Abbasi, Abdul	Dr. Report	96
	Esclate	21412223	YES team	07/19/2023	AHDHHD222	Advanced Dermatology Care Center	Acclaim	PPO	Aboshady in Patient Services	Email	33
	Esclate	23123	Test Umesh	7/17/2023	DDD22	Gupta, Rishi MD	Affordable Benefit Administrator	Self Pay and CEP	Aboshady in Patient Services	Faxes	2
	Esclate	99999	Test Dashboard	07/14/2023	ASSGG100	Abary, Alexander MD	Access	MCR	Aboshady in Patient Services	Hourly	2
	Approve	9927588	Mukesh	7/14/2023	A76	Greater LB Ortho Surgical & Medical Group A Ptrshp	Affiliated Physicians IPA	PPO	Abbasi, Abdul	Email	900
	Esclate	21344	test 11125	07/13/2023	ADD444	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.

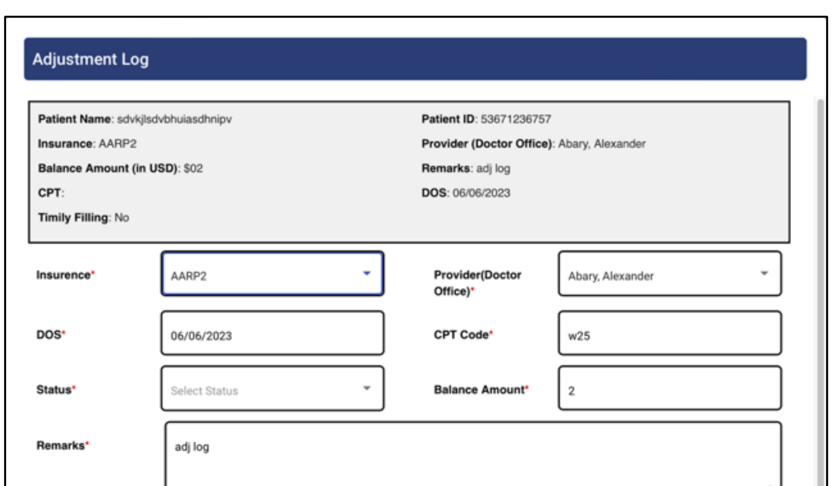


Figure .: Edit/Update Adjustment Log– Action

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: .

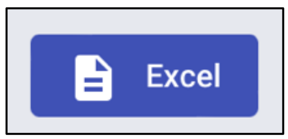
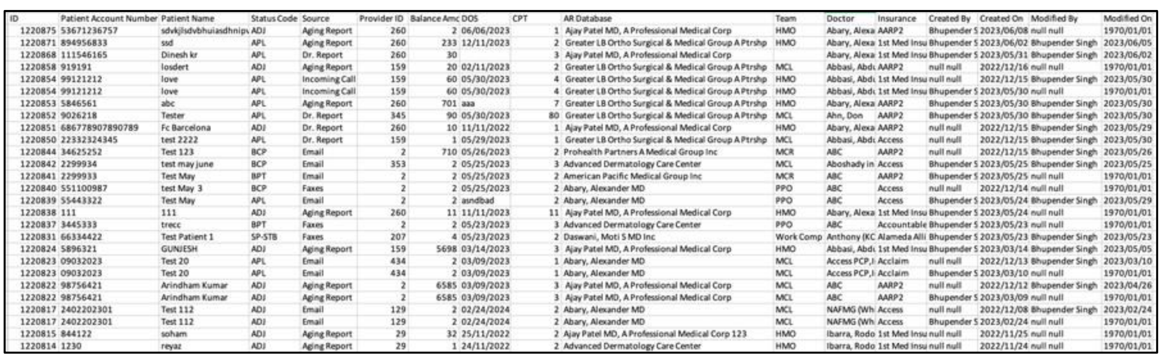


Figure no: Excel Sheet - Icon



ID	Patient Account Number	Patient Name	Status Code	Source	Provider ID	Balance Amc	DOS	CPT	AR Database	Team	Doctor	Insurance	Created By	Created On	Modified By	Modified On
1220875	53671236757	sdvkjlsdvbhuiasdhnips	ADJ	Aging Report	260	2	06/06/2023	1	Ajay Patel MD, A Professional Medical Corp	HMO	Abary, Alexa	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 Ortho Surgical & Medical Group A Ptrshp	HMO	Abary, Alexa	1st Med Insu	Bhupender S	2023/06/02	Bhupender Singh	2023/06/05
1220868	111546165	Dinesh kr	APL	Dr. Report	260	30		3	Ajay Patel MD, A Professional Medical Corp		Abary, Alexa	1st Med Insu	Bhupender S	2023/05/31	Bhupender Singh	2023/06/02
1220858	919191	losdert	ADJ	Aging Report	159	20	02/11/2023	2	Greater LB Ortho Surgical & Medical Group A Ptrshp	MCL	Abbasi, Abdu	AARP2	null null	2022/12/16	null null	1970/01/01
1220854	99121212	love	APL	Incoming Call	159	60	05/30/2023	4	Greater LB Ortho Surgical & Medical Group A Ptrshp	HMO	Abbasi, Abdu	1st Med Insu	null null	2022/12/15	Bhupender Singh	2023/05/30
1220854	99121212	love	APL	Incoming Call	159	60	05/30/2023	4	Greater LB Ortho Surgical & Medical Group A Ptrshp	HMO	Abbasi, Abdu	1st Med Insu	Bhupender S	2023/05/30	null null	1970/01/01
1220853	5846561	abc	APL	Aging Report	260	701	aaa	7	Greater LB Ortho Surgical & Medical Group A Ptrshp	HMO	Abary, Alexa	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 Ortho Surgical & Medical Group A Ptrshp	MCL	Ahn, Don	AARP2	Bhupender S	2023/05/30	Bhupender Singh	2023/05/30
1220851	686778907890789	Fc Barcelona	ADJ	Dr. Report	260	10	11/11/2022	1	Ajay Patel MD, A Professional Medical Corp	HMO	Abary, Alexa	AARP2	null null	2022/12/15	Bhupender Singh	2023/05/29
1220850	22332324345	test 2222	APL	Dr. Report	159	1	05/29/2023	1	Greater LB Ortho Surgical & Medical Group A Ptrshp	MCL	Abbasi, Abdu	Access	null null	2022/12/15	Bhupender Singh	2023/05/30
1220844	34625252	Test 123	BCP	Email	2	710	05/26/2023	2	Prohealth Partners A Medical Group Inc	MCR	ABC	AARP2	null null	2022/12/15	Bhupender Singh	2023/05/26
1220842	2299934	test may june	BCP	Email	353	2	05/25/2023	3	Advanced Dermatology Care Center	MCL	Aboshady in	Access	Bhupender S	2023/05/25	Bhupender Singh	2023/05/25
1220841	2299933	Test May	BPT	Email	2	2	05/25/2023	2	American Pacific Medical Group Inc	MCR	ABC	AARP2	Bhupender S	2023/05/25	null null	1970/01/01
1220840	551100987	test May 3	BCP	Faxes	2	2	05/25/2023	2	Abary, Alexander MD	PPO	ABC	Access	null null	2022/12/14	null null	1970/01/01
1220839	55443322	Test May	APL	Email	2	2	asndbad	2	Abary, Alexander MD	PPO	ABC	Access	Bhupender S	2023/05/24	Bhupender Singh	2023/05/29
1220838	111	111	ADJ	Aging Report	260	11	11/11/2023	11	Ajay Patel MD, A Professional Medical Corp	HMO	Abary, Alexa	1st Med Insu	Bhupender S	2023/05/24	null null	1970/01/01
1220837	3445333	trecc	BPT	Faxes	2	2	05/23/2023	3	Advanced Dermatology Care Center	PPO	ABC	Accountable	Bhupender S	2023/05/23	null null	1970/01/01
1220831	66334422	Test Patient 1	SP-STB	Faxes	207	4	05/23/2023	2	Daswani, Moti S MD Inc	Work Comp	Anthony (KC	Alameda Alli	Bhupender S	2023/05/23	Bhupender Singh	2023/05/23
1220824	5896321	GUNJESH	ADJ	Aging Report	159	5698	03/14/2023	3	Ajay Patel MD, A Professional Medical Corp	HMO	Abbasi, Abdu	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,I	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,I	Acclaim	Bhupender S	2023/03/10	null null	1970/01/01
1220822	98756421	Arindham Kumar	ADJ	Aging Report	2	6585	03/09/2023	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	ADJ	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	ADJ	Email	129	2	02/24/2024	2	Abary, Alexander MD	MCL	NAFMG (Wh	Access	null null	2022/12/08	Bhupender Singh	2023/02/24
1220817	2402202301	Test 112	ADJ	Email	129	2	02/24/2024	2	Abary, Alexander MD	MCL	NAFMG (Wh	Access	Bhupender S	2023/02/24	null null	1970/01/01
1220815	844122	soham	ADJ	Aging Report	29	32	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	1230	reyaz	ADJ	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 Filling:** User will be able to view the following information as shown below in Figure:
  - Approved, Escalate, Reject & Closed

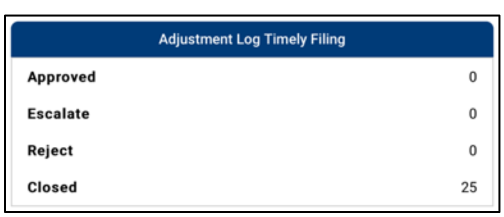


Figure no: Adjustment Log Timely Filling

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 Filling**: 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 Filling

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.

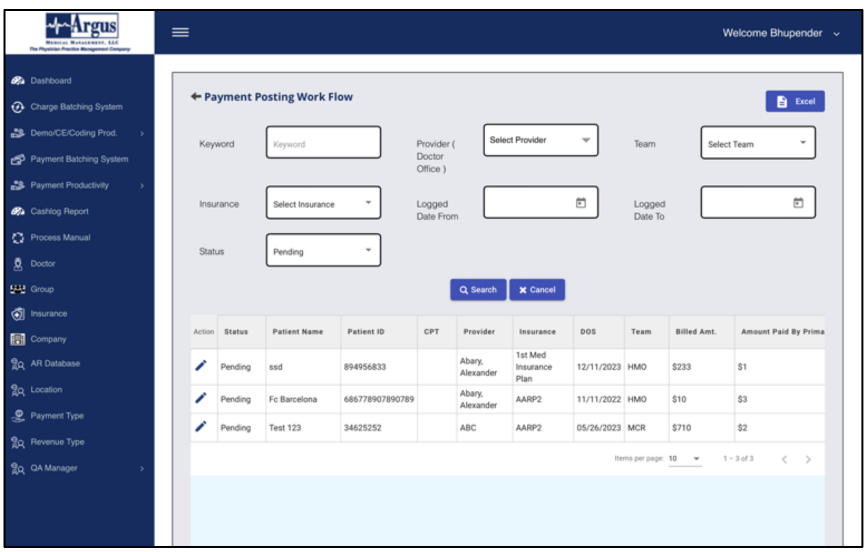


Figure no: Payment Posting Workflow

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.

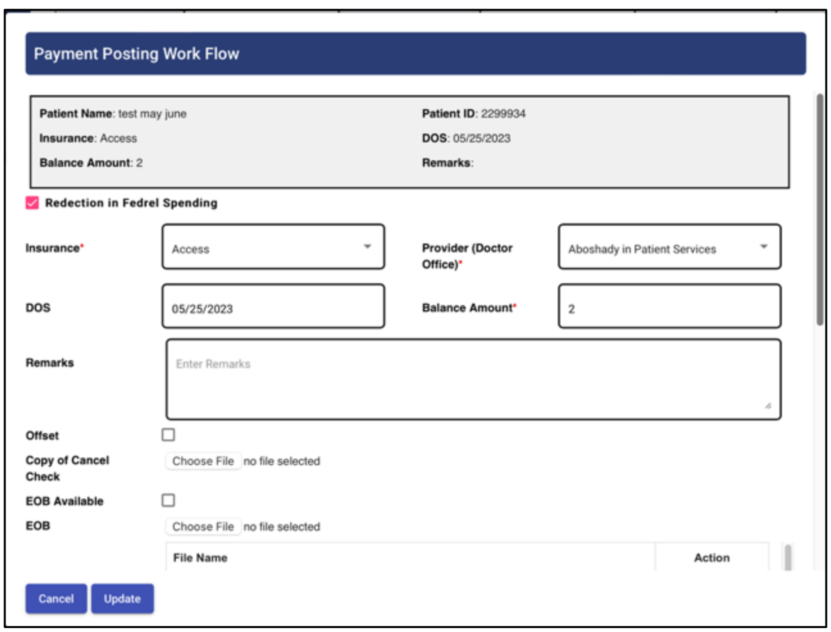


Figure .: Edit/Update Payment Posting Workflow – Action

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: .

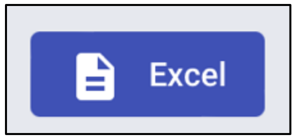


Figure no: Excel Sheet - Icon

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	53671236757	sdvkjlsdvbhuiasdhnipv	ADJ	Aging Report	260	2	06/06/2023	1	Ajay Patel MD, A Professional Medical Corp	HMO	Abary, Alexa	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 Ortho Surgical & Medical Group A Ptrshp	HMO	Abary, Alexa	1st Med Insu	Bhupender S	2023/06/02	Bhupender Singh	2023/06/05
1220868	111546165	Dinesh kr	APL	Dr. Report	260	30		3	Ajay Patel MD, A Professional Medical Corp		Abary, Alexa	1st Med Insu	Bhupender S	2023/05/31	Bhupender Singh	2023/06/02
1220858	919191	losdert	ADJ	Aging Report	159	20	02/11/2023	2	Greater LB Ortho Surgical & Medical Group A Ptrshp	MCL	Abbasi, Abdu	AARP2	null null	2022/12/16	null null	1970/01/01
1220854	99121212	love	APL	Incoming Call	159	60	05/30/2023	4	Greater LB Ortho Surgical & Medical Group A Ptrshp	HMO	Abbasi, Abdu	1st Med Insu	null null	2022/12/15	Bhupender Singh	2023/05/30
1220854	99121212	love	APL	Incoming Call	159	60	05/30/2023	4	Greater LB Ortho Surgical & Medical Group A Ptrshp	HMO	Abbasi, Abdu	1st Med Insu	Bhupender S	2023/05/30	null null	1970/01/01
1220853	5846561	abc	APL	Aging Report	260	701	aaa	7	Greater LB Ortho Surgical & Medical Group A Ptrshp	HMO	Abary, Alexa	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 Ortho Surgical & Medical Group A Ptrshp	MCL	Ahn, Don	AARP2	Bhupender S	2023/05/30	Bhupender Singh	2023/05/30
1220851	686778907890789	Fc Barcelona	ADJ	Dr. Report	260	10	11/11/2022	1	Ajay Patel MD, A Professional Medical Corp	HMO	Abary, Alexa	AARP2	null null	2022/12/15	Bhupender Singh	2023/05/29
1220850	22332324345	test 2222	APL	Dr. Report	159	1	05/29/2023	1	Greater LB Ortho Surgical & Medical Group A Ptrshp	MCL	Abbasi, Abdu	Access	null null	2022/12/15	Bhupender Singh	2023/05/30
1220844	34625252	Test 123	BCP	Email	2	710	05/26/2023	2	Prohealth Partners A Medical Group Inc	MCR	ABC	AARP2	null null	2022/12/15	Bhupender Singh	2023/05/26
1220842	2299934	test may june	BCP	Email	353	2	05/25/2023	3	Advanced Dermatology Care Center	MCL	Aboshady in	Access	Bhupender S	2023/05/25	Bhupender Singh	2023/05/25
1220841	2299933	Test May	BPT	Email	2	2	05/25/2023	2	American Pacific Medical Group Inc	MCR	ABC	AARP2	Bhupender S	2023/05/25	null null	1970/01/01
1220840	551100987	test May 3	BCP	Faxes	2	2	05/25/2023	2	Abary, Alexander MD	PPO	ABC	Access	null null	2022/12/14	null null	1970/01/01
1220839	55443322	Test May	APL	Email	2	2	asndbad	2	Abary, Alexander MD	PPO	ABC	Access	Bhupender S	2023/05/24	Bhupender Singh	2023/05/29
1220838	111	111	ADJ	Aging Report	260	11	11/11/2023	11	Ajay Patel MD, A Professional Medical Corp	HMO	Abary, Alexa	1st Med Insu	Bhupender S	2023/05/24	null null	1970/01/01
1220837	3445333	trecc	BPT	Faxes	2	2	05/23/2023	3	Advanced Dermatology Care Center	PPO	ABC	Accountable	Bhupender S	2023/05/23	null null	1970/01/01
1220831	66334422	Test Patient 1	SP-STB	Faxes	207	4	05/23/2023	2	Daswani, Moti S MD Inc	Work Comp	Anthony (KC	Alameda Alli	Bhupender S	2023/05/23	Bhupender Singh	2023/05/23
1220824	5896321	GUNJESH	ADJ	Aging Report	159	5698	03/14/2023	3	Ajay Patel MD, A Professional Medical Corp	HMO	Abbasi, Abdu	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,I	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,I	Acclaim	Bhupender S	2023/03/10	null null	1970/01/01
1220822	98756421	Arindham Kumar	ADJ	Aging Report	2	6585	03/09/2023	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	ADJ	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	ADJ	Email	129	2	02/24/2024	2	Abary, Alexander MD	MCL	NAFMG (Wh	Access	null null	2022/12/08	Bhupender Singh	2023/02/24
1220817	2402202301	Test 112	ADJ	Email	129	2	02/24/2024	2	Abary, Alexander MD	MCL	NAFMG (Wh	Access	Bhupender S	2023/02/24	null null	1970/01/01
1220815	844122	soham	ADJ	Aging Report	29	32	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	1230	reyaz	ADJ	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

- **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.

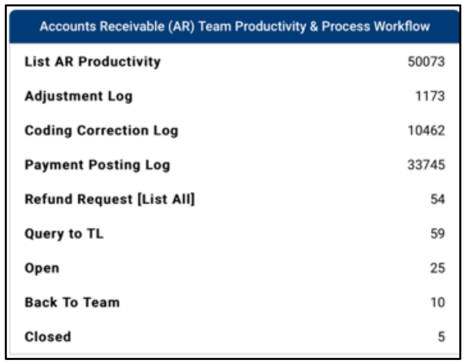


Figure no: Accounts Receivable (AR) Team Productivity & Process Workflow

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.

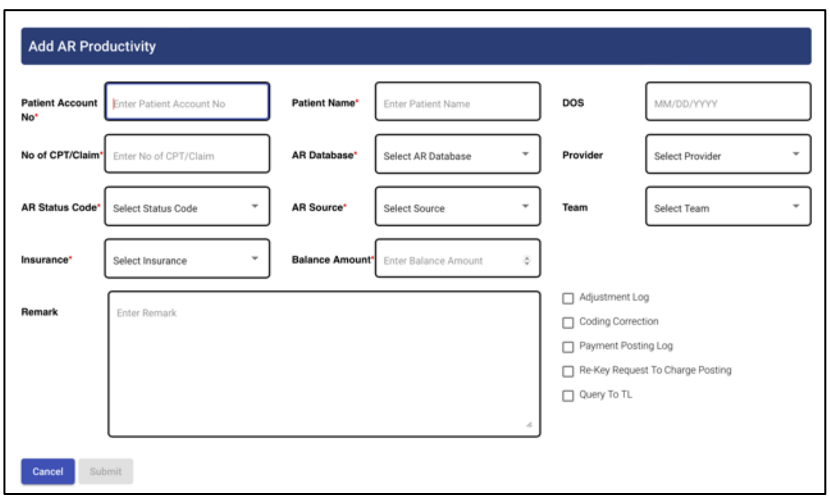


Figure .: Add AR Productivity– Action

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.

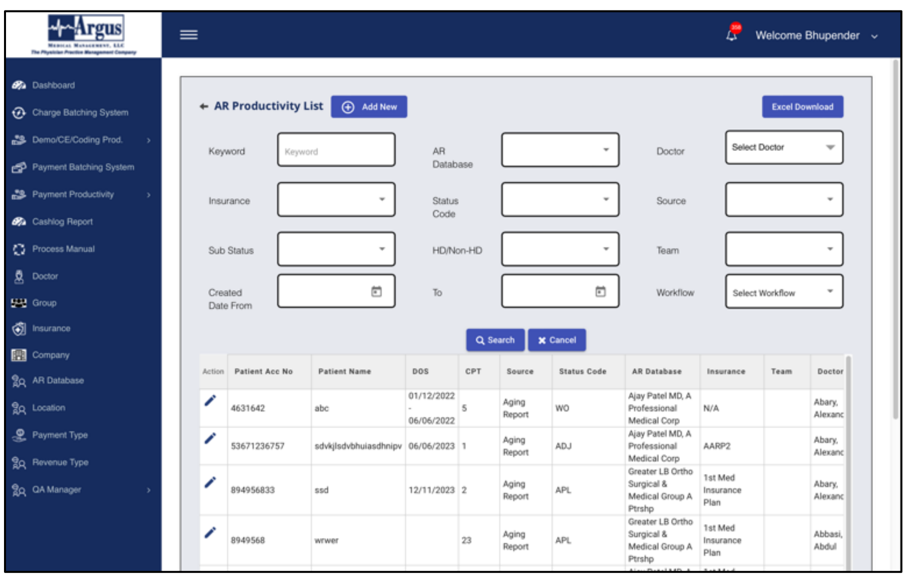


Figure no: AR Productivity List

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.

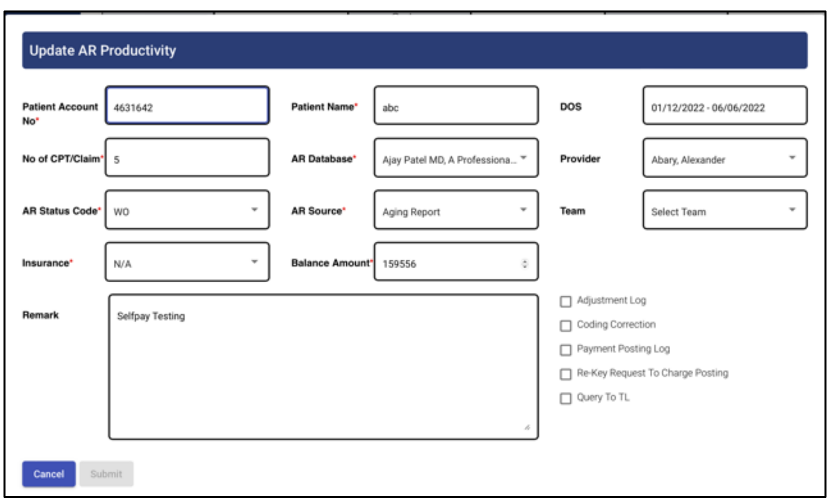


Figure .: Edit/Update AR Productivity– Action

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: .

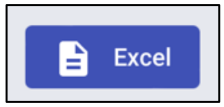


Figure no: Excel Sheet - Icon

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	WO	Aging Report	260	159556	01/12/2022	5	Ajay Patel M	Self Pay and CEP	Abary, Alexander	N/A	Bhupender S	2023/06/10	Bhupender Singh	2023/06/09
1220875	5367123675	sdvkjlsdvbhu	ADJ	Aging Report	260	2	06/06/2023	1	Ajay Patel M	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 (	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 (	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 M	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 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 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 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	23	12/12/2020	345	Greater LB (	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	234	Ajay Patel M	MCL	Abbasi, Abdul	1st Med Insu	Bhupender S	2023/05/31	null null	1970/01/01
1220860	12	sdfsdf	APL	Dr. Report	159	20	12/12/2022	23	Greater LB (	MCL	Abbasi, Abdul	Access	Bhupender S	2023/05/31	null null	1970/01/01
1220859	092394	ari test	APL	Dr. Report	159	30	02/12/223	23	Greater LB (	MCL	Abbasi, Abdul	AARP2	Bhupender S	2023/05/31	null null	1970/01/01
1220858	919191	losdert	ADJ	Aging Report	159	20	02/11/2023	2	Greater LB (	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 (	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 (	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 (	MCL	Ahn, Don	AARP2	Bhupender S	2023/05/30	Bhupender Singh	2023/05/30
1220851	686778907	Fc Barcelona	ADJ	Dr. Report	260	10	11/11/2022	1	Ajay Patel M	HMO	Abary, Alexander	AARP2	Bhupender S	2023/05/29	Bhupender Singh	2023/05/30
1220850	223323243	test 2222	APL	Dr. Report	159	1	05/29/2023	1	Greater LB (	MCL	Abbasi, Abdul	Access	Bhupender S	2023/05/29	Bhupender Singh	2023/05/30
1220848	4235456	654	ADJ	Aging Report	159	5	@6637\bnd	22	Greater LB (	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.

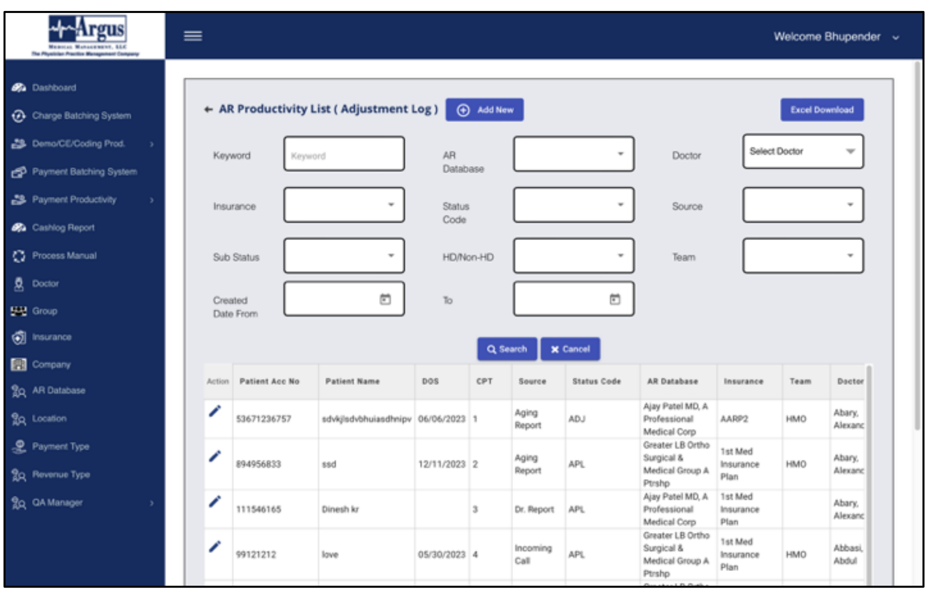


Figure no: AR Productivity List (Adjustment Log)

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).

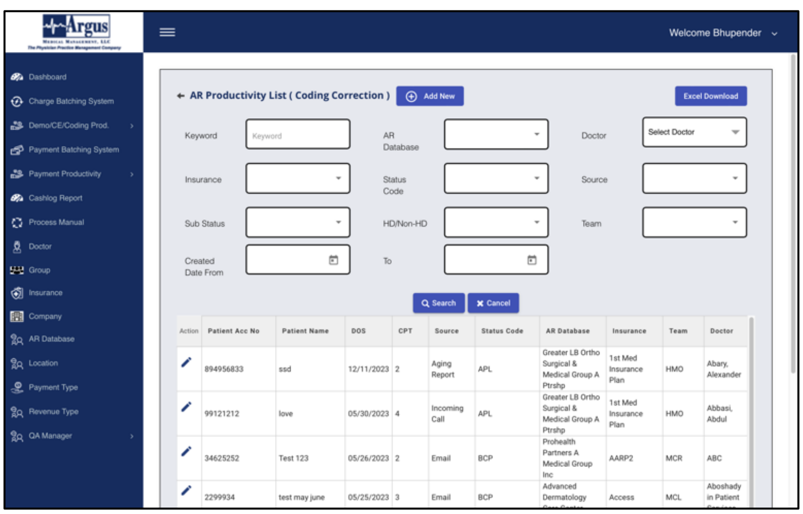


Figure no: AR Productivity List (Coding Correction)

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).

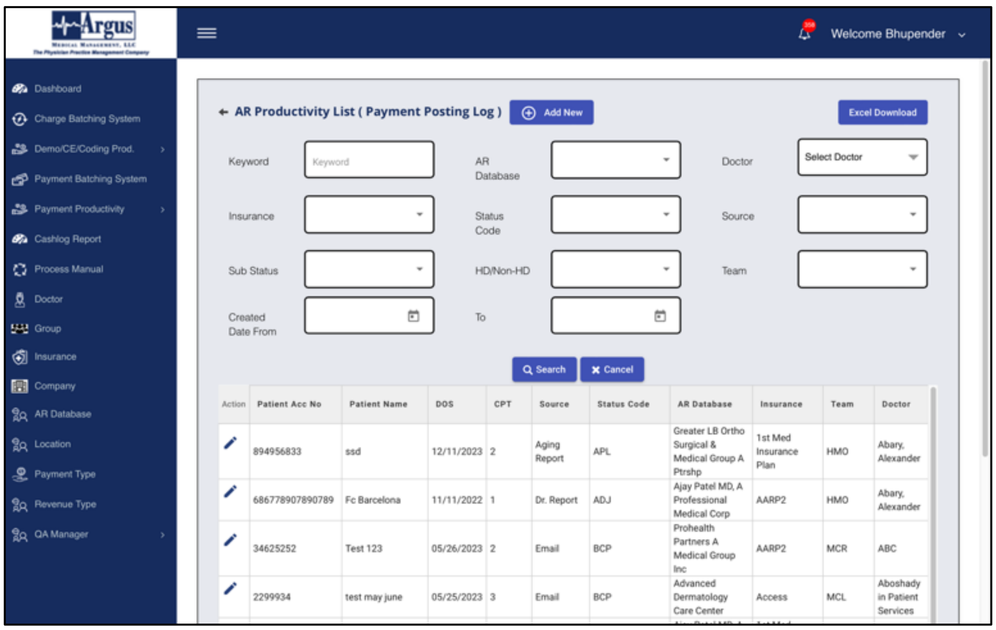


Figure no: AR Productivity List (Payment Posting Log)

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).

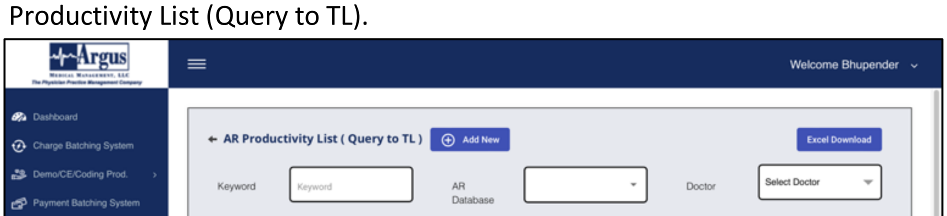


Figure no: AR Productivity List (Query to TL)

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.

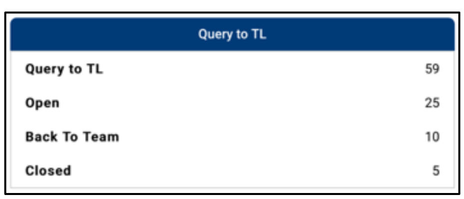


Figure no: Query To TL

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.

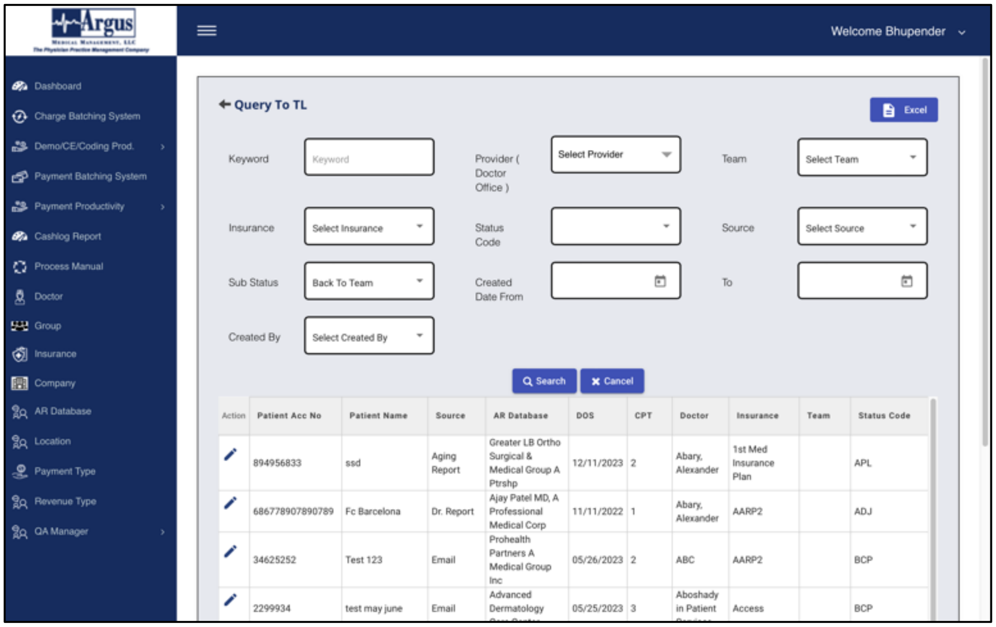


Figure no: Query To TL

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.

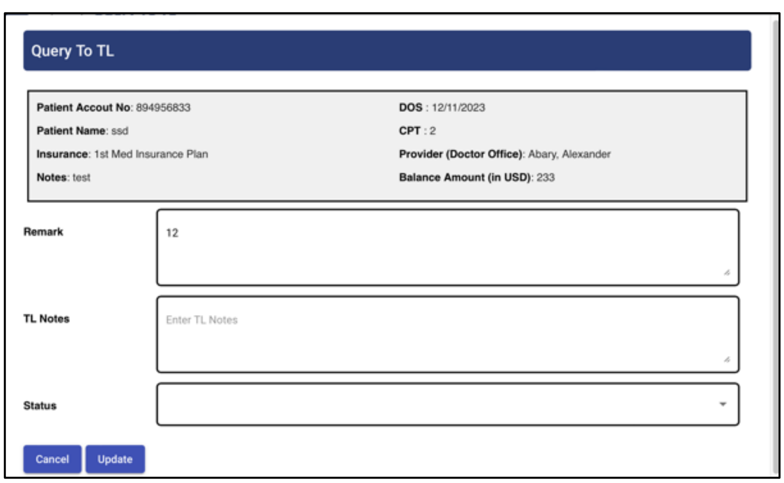


Figure .: Edit/Update Query To TL– Action

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: .

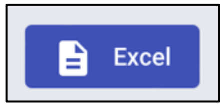


Figure no: Downloaded Excel Sheet

ID	Patient Acco	Patient Nam	Status Code	Source	Provider ID	Balance Am	DOS	CPT	AR Database	Team	Doctor	Insurance	Created By	Created On	Modified By	Modified On
1220876	4631642	abc	WO	Aging Report	260	159556	01/12/2022	5	Ajay Patel M	Self Pay and CEP	Abary, Alexander	N/A	Bhupender S	2023/06/10	Bhupender Singh	2023/06/09
1220875	5367123675	sdvkjlsdvbhu	ADI	Aging Report	260	2	06/06/2023	1	Ajay Patel M	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 (	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 (	HMO	Abbasi, Abdul	1st Med Insu	Bhupender S	2023/06/02	null null	1970/01/01
1220869	89495684	rishi	ADI	Aging Report	159	63		3	Ajay Patel M	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 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 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 MD, A Professional		Abary, Alexander	1st Med Insu	Bhupender S	2023/05/31	null null	1970/01/01
1220864	345	ret	ADI	Dr. Report	260	23	12/12/2020	345	Greater LB (	MCL	Abary, Alexander	1st Med Insu	Bhupender S	2023/05/31	null null	1970/01/01
1220863	234	wer	ADI	Dr. Report	159	234	12/12/2023	234	Ajay Patel M	MCL	Abbasi, Abdul	1st Med Insu	Bhupender S	2023/05/31	null null	1970/01/01
1220860	12	sdfsdf	APL	Dr. Report	159	20	12/12/2022	23	Greater LB (	MCL	Abbasi, Abdul	Access	Bhupender S	2023/05/31	null null	1970/01/01
1220859	092394	ari test	APL	Dr. Report	159	30	02/12/223	23	Greater LB (	MCL	Abbasi, Abdul	AARP2	Bhupender S	2023/05/31	null null	1970/01/01
1220858	919191	losdert	ADI	Aging Report	159	20	02/11/2023	2	Greater LB (	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 (	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 (	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 (	MCL	Ahn, Don	AARP2	Bhupender S	2023/05/30	Bhupender Singh	2023/05/30
1220851	68677890787	Fc Barcelona	ADI	Dr. Report	260	10	11/11/2022	1	Ajay Patel M	HMO	Abary, Alexander	AARP2	Bhupender S	2023/05/29	Bhupender Singh	2023/05/30
1220850	22332324343	test 2222	APL	Dr. Report	159	1	05/29/2023	1	Greater LB (	MCL	Abbasi, Abdul	Access	Bhupender S	2023/05/29	Bhupender Singh	2023/05/30
1220848	4235456	654	ADI	Aging Report	159	5	@6637\bnd	22	Greater LB (	MCL	Abbasi, 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.

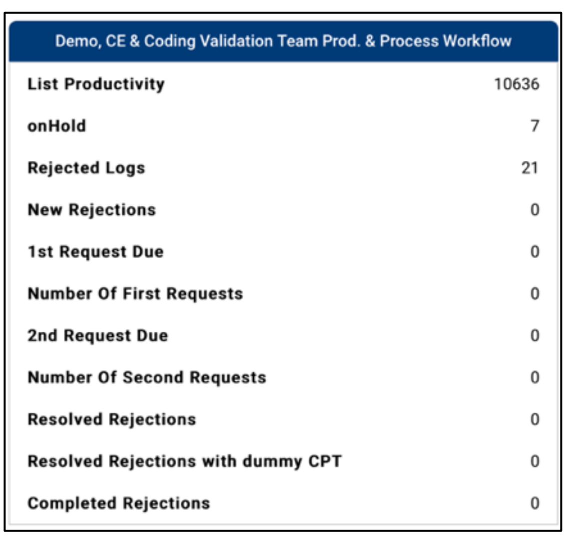


Figure no:

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.

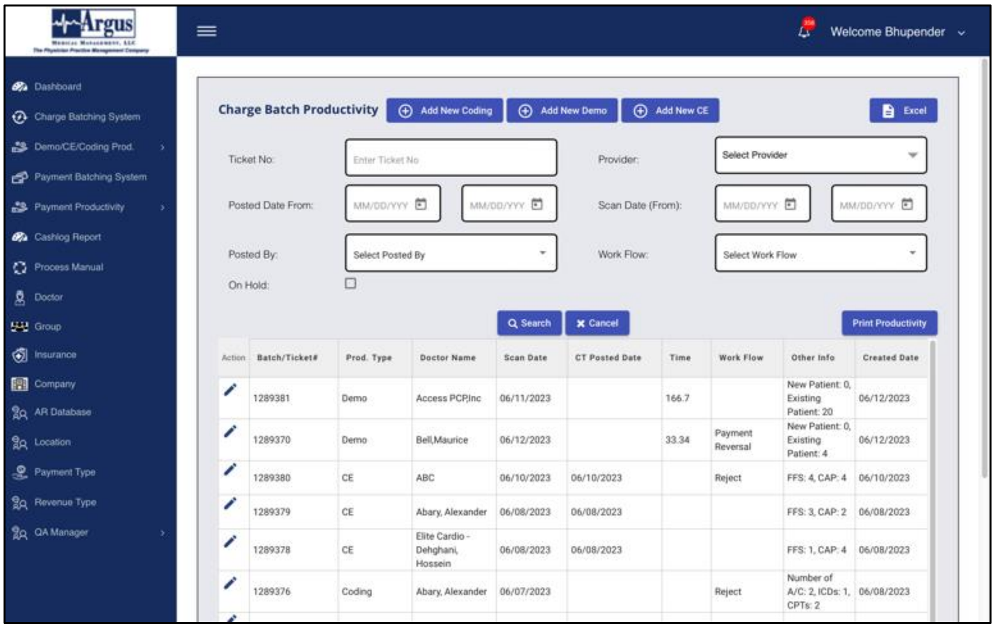


Figure no:

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.

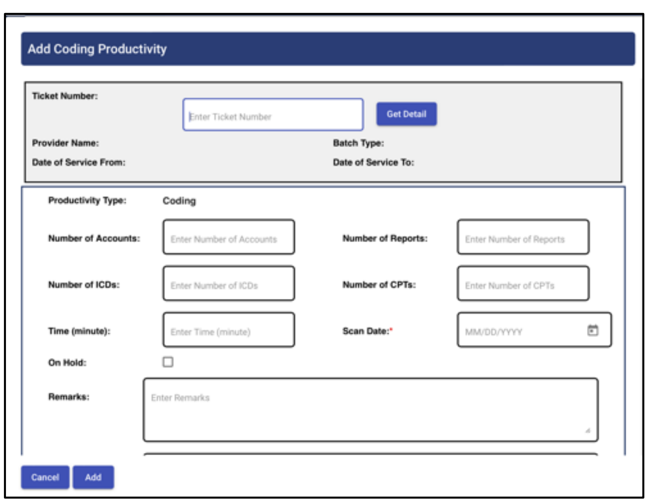


Figure .: Add Coding Productivity – Action

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.

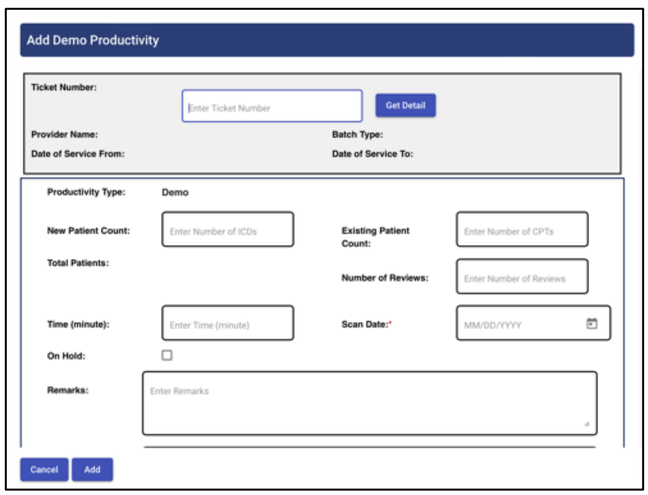


Figure .: Add Demo Productivity – Action

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.

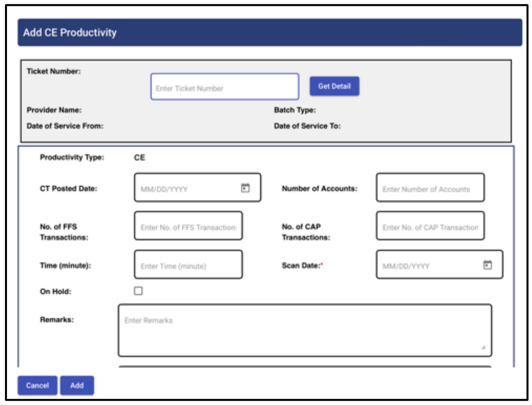


Figure .: Add Coding Productivity – Action

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.

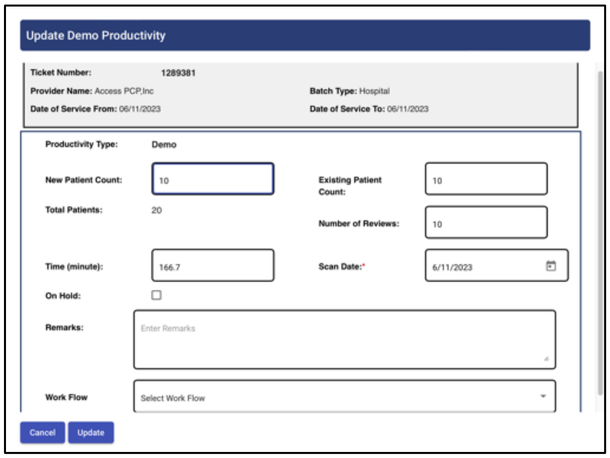


Figure .: Edit/Update Demo Productivity– Action

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.

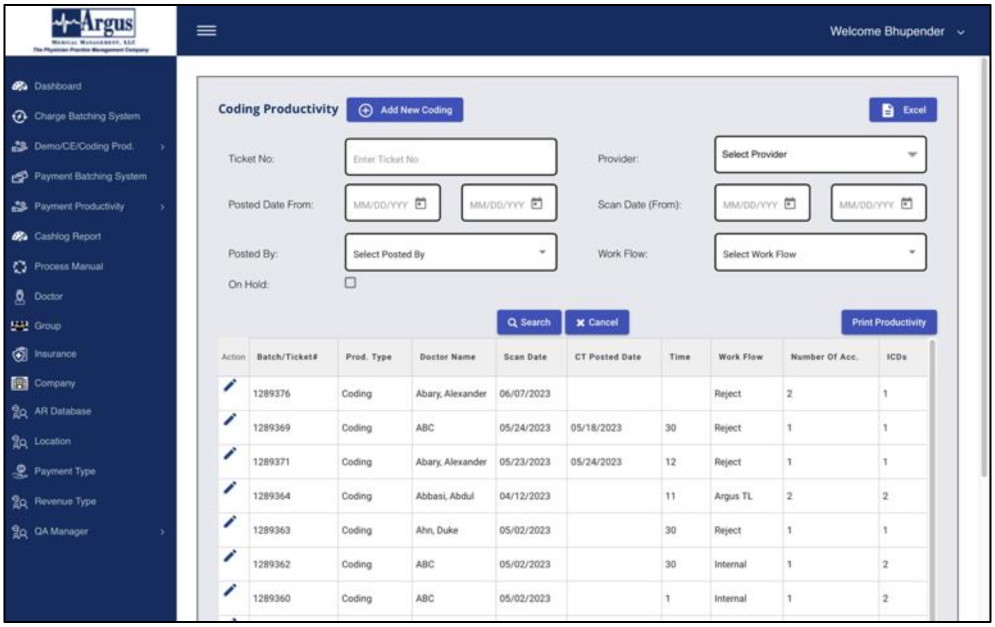


Figure no:

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.

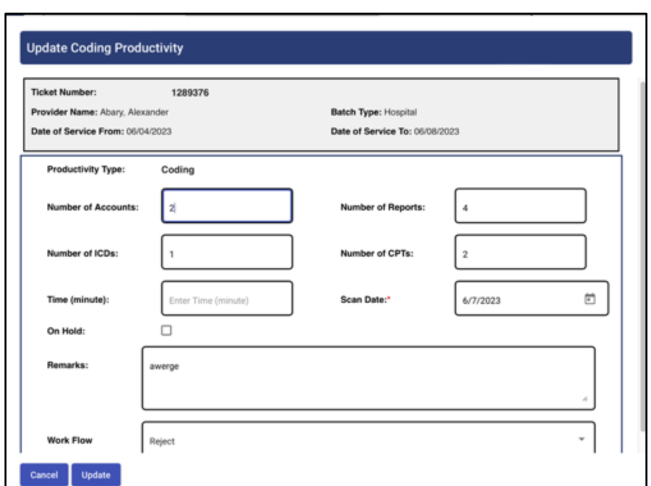


Figure .: Edit/Update Coding Productivity– Action

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.

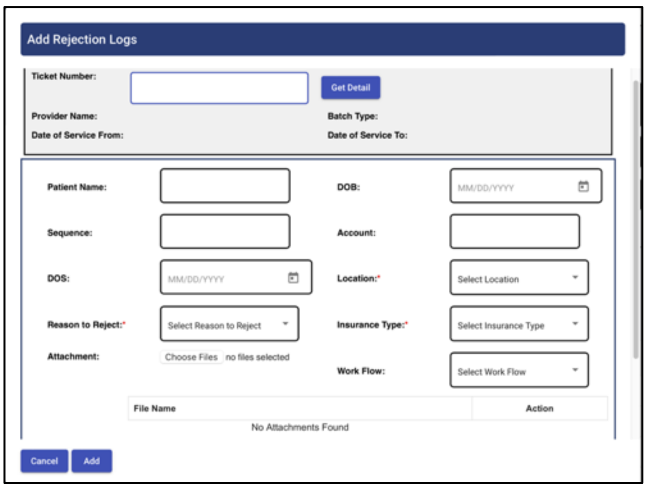


Figure .: Add Rejection Logs – Action

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.

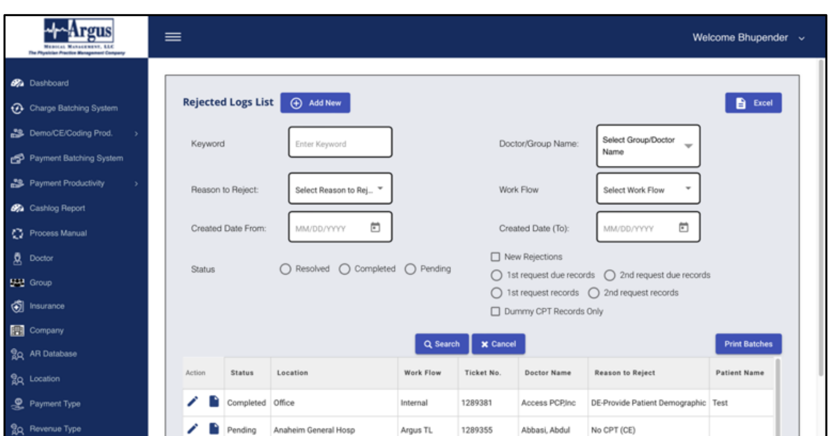


Figure no:

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 change 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.

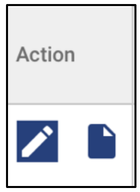


Figure .: Edit Icon – Action.

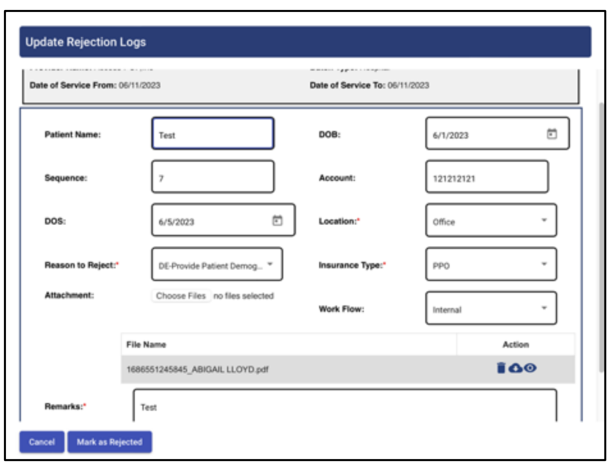


Figure .: Edit/Update Rejection Logs– Action

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.

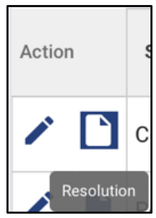


Figure .: Resolution Icon – Action.

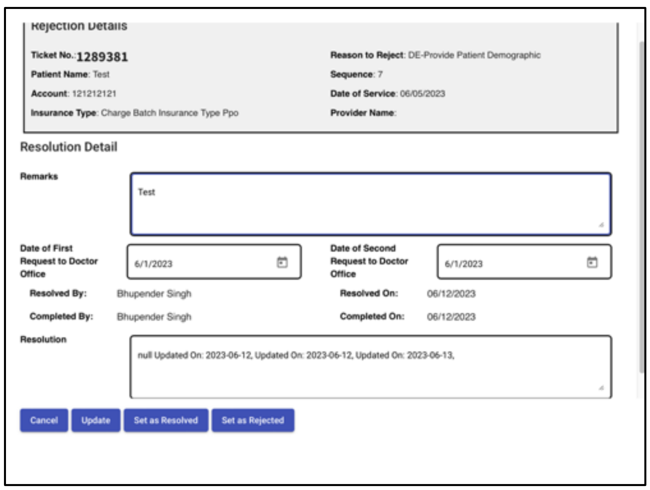


Figure .: Resolution – Action

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: .

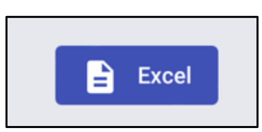


Figure no:

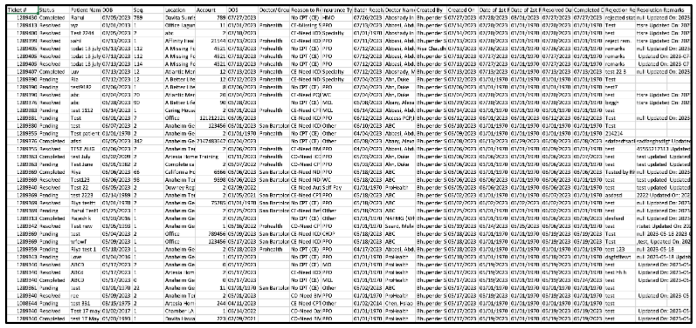


Figure no:

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.

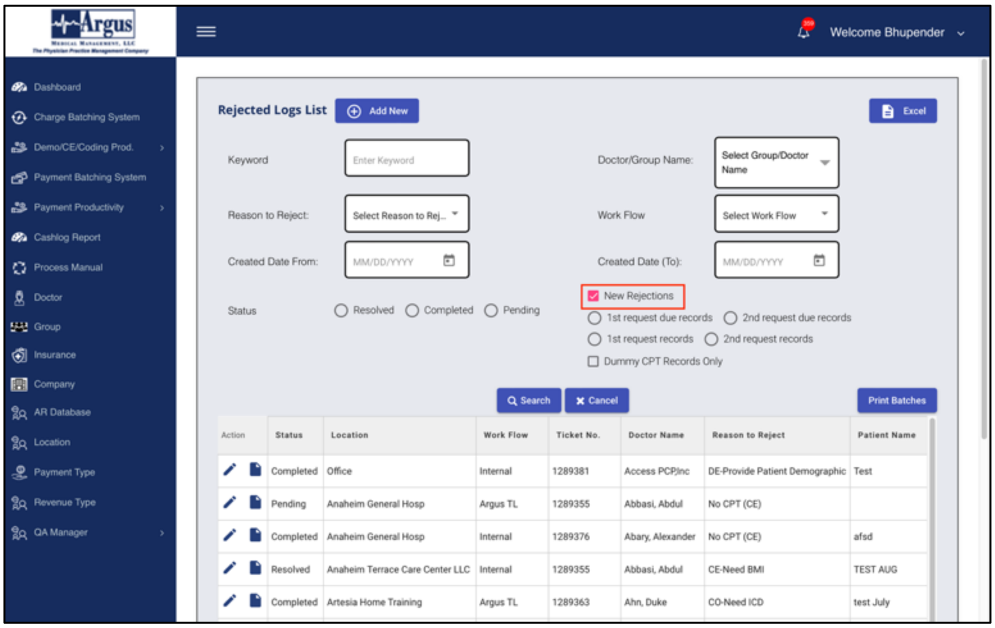


Figure no:

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.

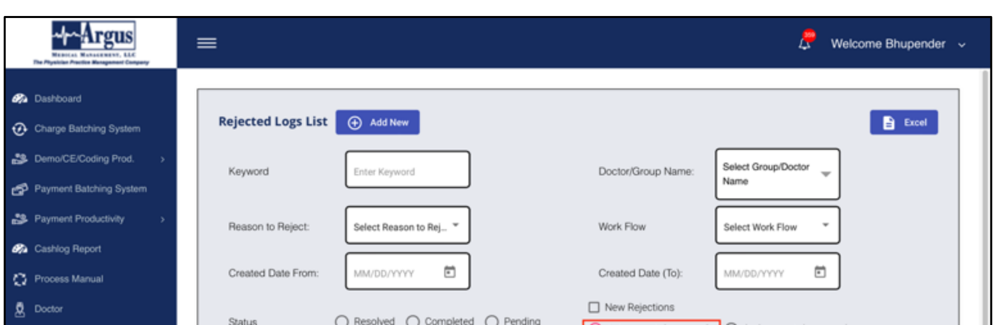


Figure no:

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.

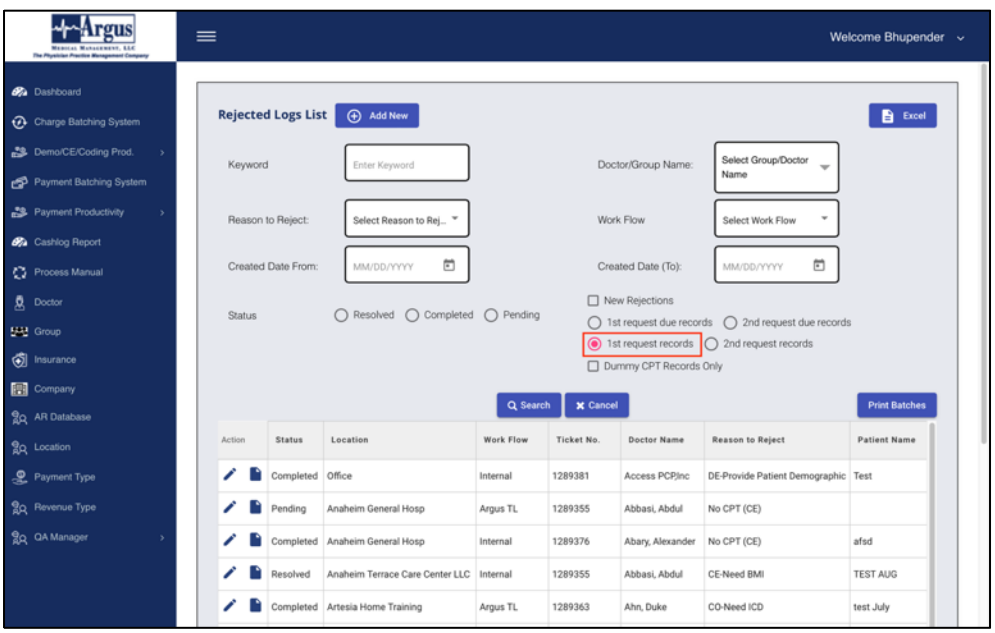


Figure no:

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.

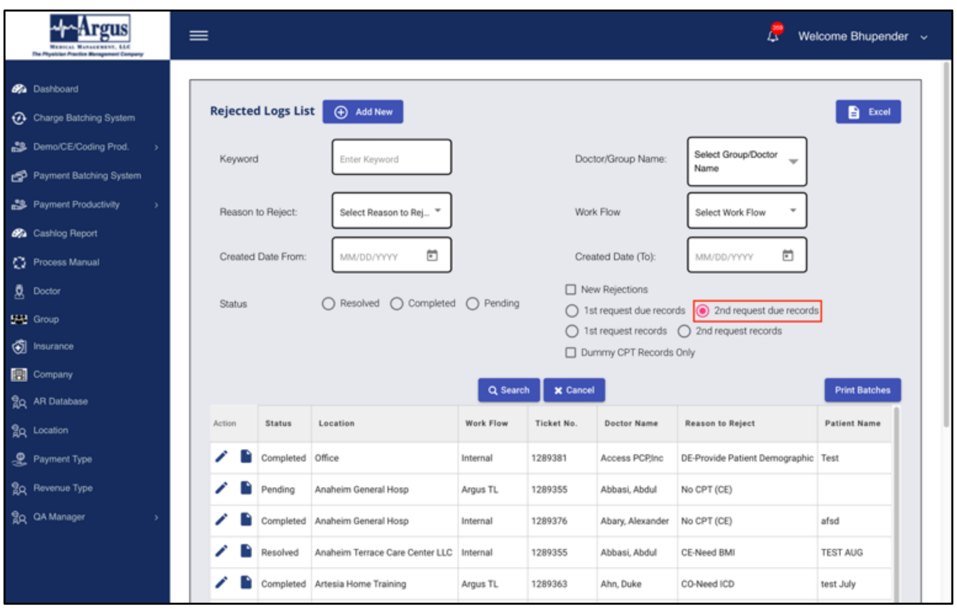


Figure no:

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.

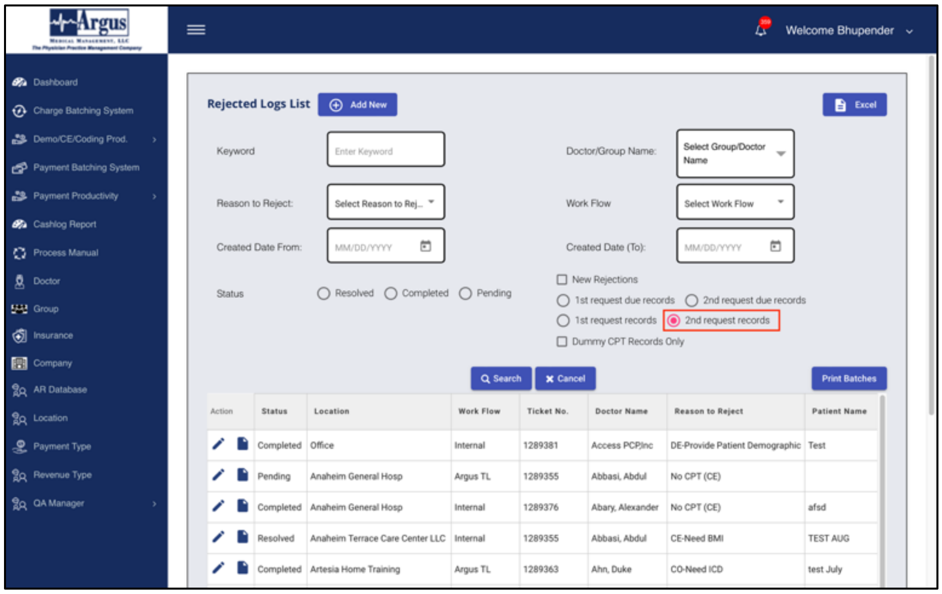


Figure no:

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.

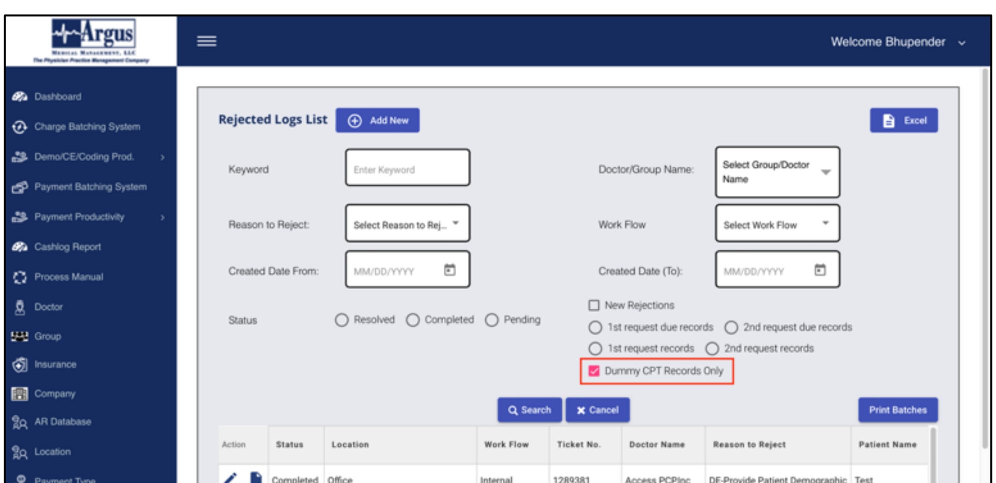


Figure no:

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.

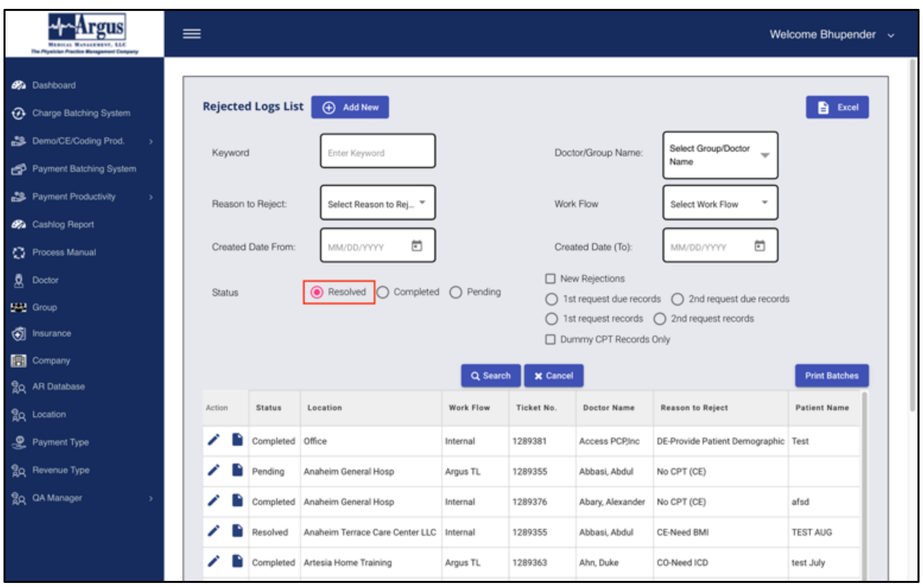


Figure no:

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.

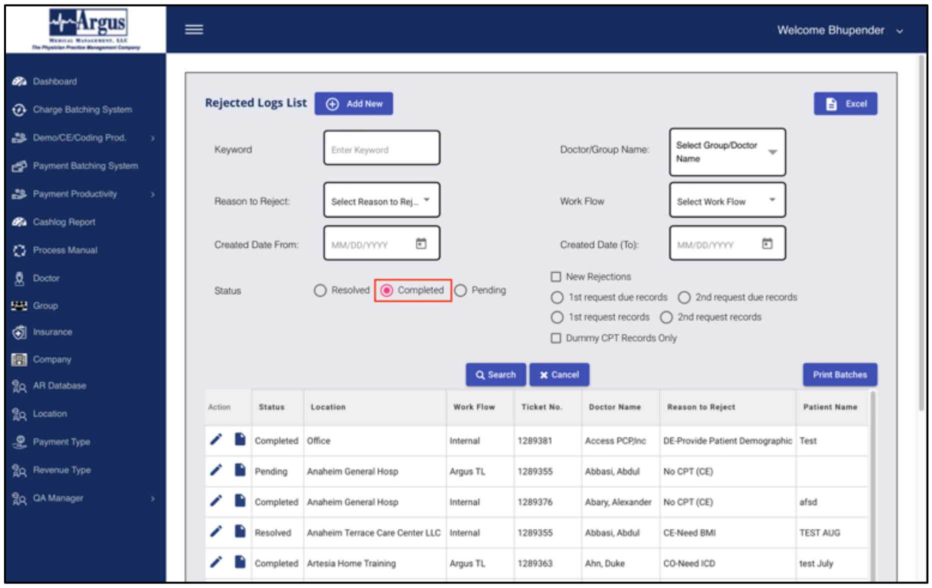


Figure no:

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.

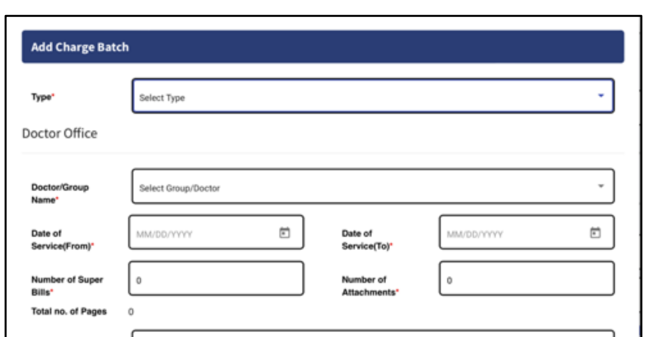


Figure .: Add Coding Productivity – Action

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).

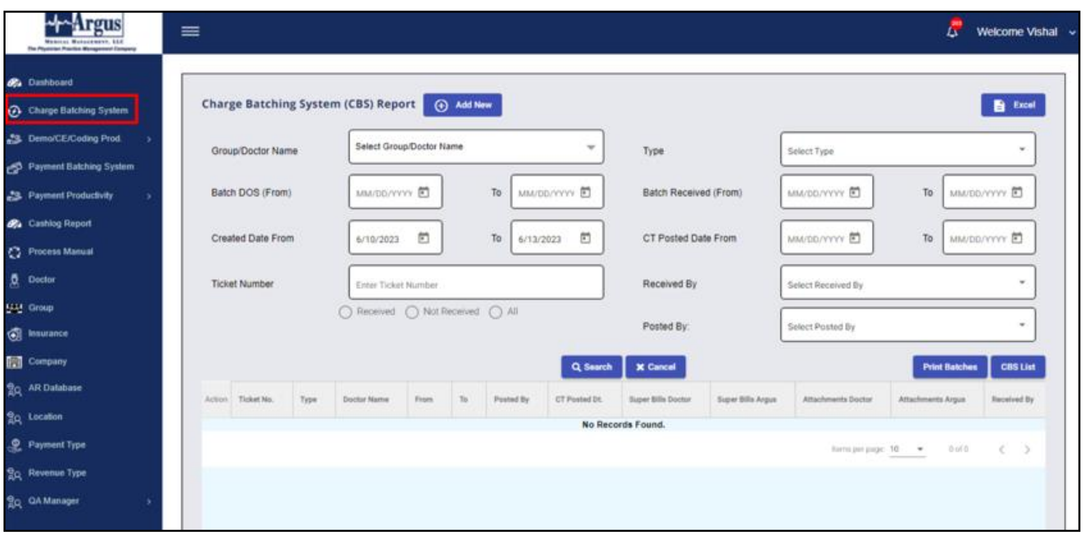


Figure no:

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: .

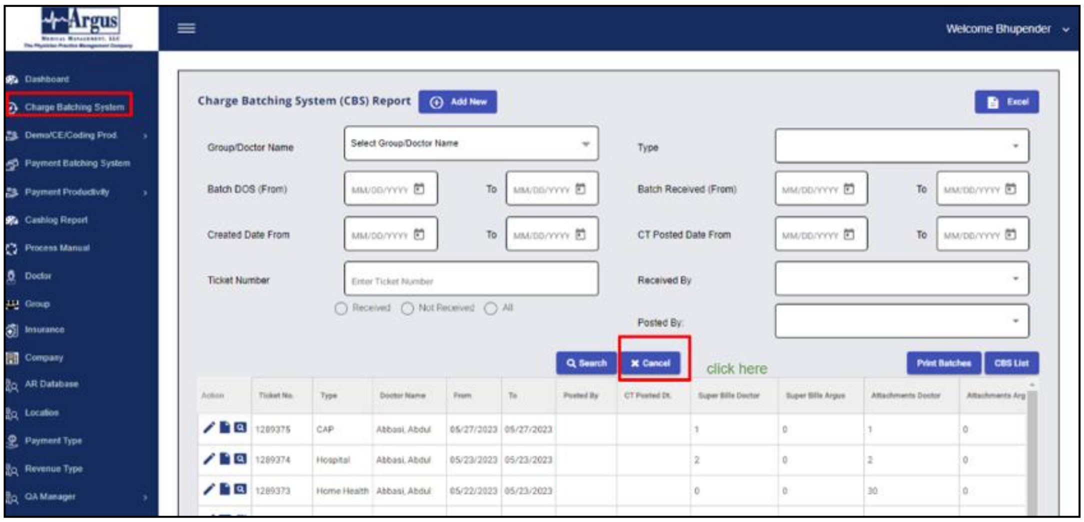


Figure no:

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.

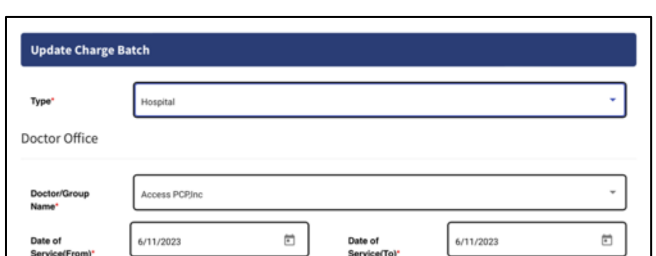


Figure .: Edit/Update Charge Batching– Action

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.

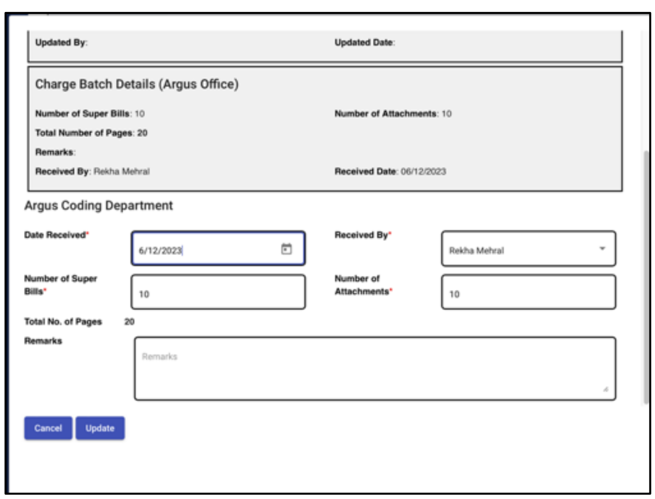


Figure .: Argus Coding Department – Action

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 (Doctor Office) as shown below in Figure:. . Fields marked with (*) are mandatory.

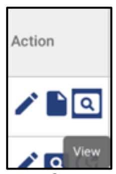


Figure .: Edit Icon – Action.

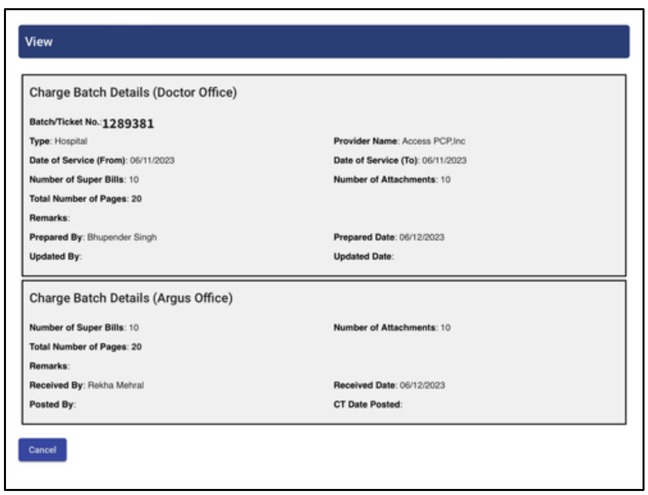


Figure .: Argus Coding Department – Action

- 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.

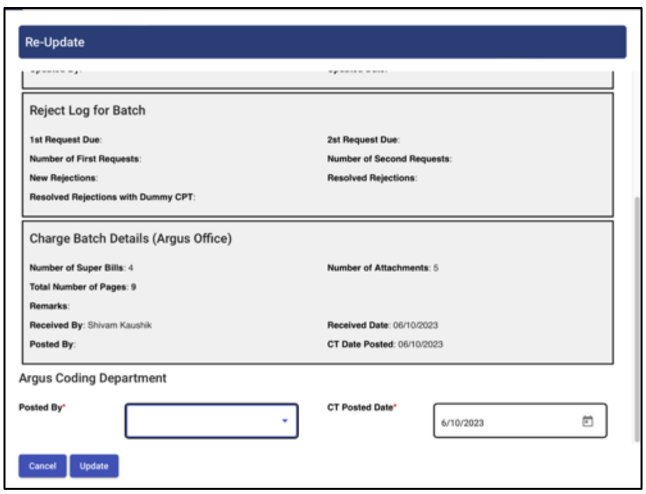


Figure .: Re-Update Argus Coding Department – Action

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: .

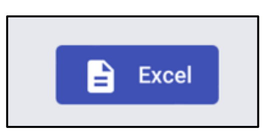


Figure no:

ID	Date Posted	DOS	Number of A	Number of A	Number of S	Number of S	Remark	Remarks Arg	Doctor	Created By	Created On	Modified By	Modified On	Posted By	Posted On	Received By	Received Dat	Doctor Company
1289381	1970/01/01	2023/06/11	10	10	10	10			Access PCP,I	Bhupender S	2023/06/12	null null	2023/06/12	null null	1970/01/01	Rekha Mehr	2023/06/12	Access Primary Care Physicians, Inc
1289380	1970/01/01	2023/06/01	5	5	4	4			ABC	Bhupender S	2023/06/10	null null	2023/06/10	null null	2023/06/10	Shivam Kaus	2023/06/10	Prohealth Partners A Medical Group Inc
1289379	1970/01/01	2023/06/06	3	2	2	3	Test	Test	Abary, Alexa	Bhupender S	2023/06/08	null null	2023/06/08	null null	2023/06/08	Shivam Kaus	2023/06/06	Access Primary Care Physicians, Inc
1289378	1970/01/01	2023/06/07	2	2	5	5			Elite Cardio -	Bhupender S	2023/06/08	null null	2023/06/08	Abhishek Ka	2023/06/08	Abhishek Ka	2023/06/08	Prohealth Partners A Medical Group Inc
1289376	1970/01/01	2023/06/04	1	1	1	1			Abary, Alexa	Bhupender S	2023/06/08	null null	2023/06/08	null null	1970/01/01	Balwinder Si	2023/06/08	Access Primary Care Physicians, Inc
1289375	1970/01/01	2023/05/27	1	0	1	0	test		Abbasi, Abdi	Bhupender S	2023/05/27	null null	1970/01/01	null null	1970/01/01	null null	1970/01/01	Prohealth Partners A Medical Group Inc
1289374	1970/01/01	2023/05/23	2	0	2	0	Test		Abbasi, Abdi	Bhupender S	2023/05/23	null null	1970/01/01	null null	1970/01/01	null null	1970/01/01	Prohealth Partners A Medical Group Inc
1289373	1970/01/01	2023/05/22	30	0	0	0	test		Abbasi, Abdi	Bhupender S	2023/05/23	Bhupender S	2023/05/23	null null	1970/01/01	null null	1970/01/01	Prohealth Partners A Medical Group Inc
1289371	1970/01/01	2017/06/07	1	7	1	3	test		Abary, Alexa	Bhupender S	2023/05/20	null null	2023/05/24	null null	2023/05/24	Aede Jimene	2023/05/23	Access Primary Care Physicians, Inc
1289364	1970/01/01	2023/05/02	2	3	2	2	test	test	Abbasi, Abdi	Bhupender S	2023/05/15	null null	2023/05/15	null null	1970/01/01	Ajay Panthri	2023/05/15	Prohealth Partners A Medical Group Inc
1289363	1970/01/01	2023/02/16	1	1	1	2	test	test	Ahn, Duke	Bhupender S	2023/05/03	null null	2023/05/03	null null	1970/01/01	Akshay Mittu	2023/05/03	Prohealth Partners A Medical Group Inc
1289362	1970/01/01	2023/05/01	2	2	2	2	test	test rem	ABC	Bhupender S	2023/05/02	null null	2023/05/02	null null	1970/01/01	Abhishek Ka	2023/05/02	Prohealth Partners A Medical Group Inc
1289361	1970/01/01	2023/02/14	2	2	1	1	test		ABC	Bhupender S	2023/05/02	null null	2023/05/02	null null	1970/01/01	Bhupender S	2023/05/02	Prohealth Partners A Medical Group Inc
1289360	1970/01/01	2023/04/25	4	4	4	4	Charge batch	received rem	ABC	Bhupender S	2023/04/26	null null	2023/04/26	null null	1970/01/01	Abhishek Ka	2023/04/26	Prohealth Partners A Medical Group Inc
1289359	1970/01/01	2023/04/16	5	5	4	4	change batch	rem.	Abbasi, Abdi	Bhupender S	2023/04/17	null null	2023/04/17	null null	2023/04/17	Abhishek Ka	2023/04/17	Prohealth Partners A Medical Group Inc
1289358	1970/01/01	2023/04/07	1	2	1	2			Abbasi, Abdi	Bhupender S	2023/04/07	null null	2023/04/07	null null	1970/01/01	Aede Jimene	2023/04/07	Prohealth Partners A Medical Group Inc
1289357	1970/01/01	2023/04/07	0	3	22	2	test		Abbasi, Abdi	Bhupender S	2023/04/07	null null	2023/04/07	null null	1970/01/01	Abhishek Ka	2023/04/07	Prohealth Partners A Medical Group Inc
1289356	1970/01/01	2023/04/06	1	2	1	2		test	ABC	Bhupender S	2023/04/06	null null	2023/04/07	null null	1970/01/01	Abhishek Ka	2023/04/07	Prohealth Partners A Medical Group Inc
1289355	1970/01/01	2023/04/03	2	3	1	4	change batch	rem.	Abbasi, Abdi	Bhupender S	2023/04/04	null null	2023/04/04	null null	1970/01/01	Bhupender S	2023/04/04	Prohealth Partners A Medical Group Inc
1289354	1970/01/01	2023/03/01	2	2	2	2	test		Abbasi, Abdi	Bhupender S	2023/03/29	null null	2023/04/18	null null	1970/01/01	Ajay Panthri	2023/03/29	Prohealth Partners A Medical Group Inc
1289353	1970/01/01	2023/03/03	1	2	1	1	test		ABC	Bhupender S	2023/03/29	null null	2023/04/07	null null	1970/01/01	Ajay Panthri	2023/03/29	Prohealth Partners A Medical Group Inc
1289352	1970/01/01	2023/03/06	1	2	1	2	test 1233		Seard, Melvi	Bhupender S	2023/03/09	null null	2023/03/14	null null	2023/03/14	Ajay Panthri	2023/03/14	Prohealth Partners A Medical Group Inc
1289351	1970/01/01	2023/03/06	1	2	1	2	test 1233		Seard, Melvi	Bhupender S	2023/03/09	null null	2023/03/14	null null	1970/01/01	Arihant Shar	2023/03/14	Prohealth Partners A Medical Group Inc
1289350	1970/01/01	2023/03/06	1	2	1	2	test 1233	tedt	Seard, Melvi	Bhupender S	2023/03/09	null null	2023/03/14	null null	1970/01/01	Ajay Panthri	2023/03/14	Prohealth Partners A Medical Group Inc
1289349	1970/01/01	2023/03/08	2	1	1	2	test	test	Goldman, Bz	Bhupender S	2023/03/09	null null	2023/04/11	null null	1970/01/01	Aede Jimene	2023/04/11	Prohealth Partners A Medical Group Inc
1289348	1970/01/01	2023/03/06	1	2	1	2	test 1233		Seard, Melvi	Bhupender S	2023/03/09	null null	2023/04/11	null null	1970/01/01	Aede Jimene	2023/04/11	Prohealth Partners A Medical Group Inc

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

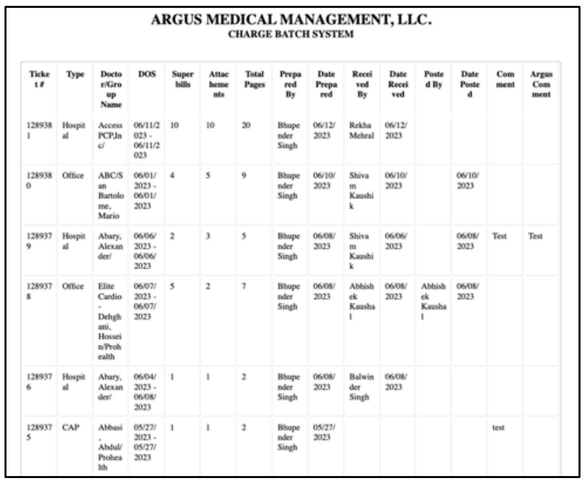
Batch ID	**1289381**	**Type**	Hospital
Part 1 Doctor Office			
Office Name/Location	Access PCP,Inc/	**Date/s of Service**	06/11/2023 - 06/11/2023
Prepared by	Bhupender Singh	**Total No. of Superbills**	10
Date Prepared	06/12/2023	**Total No. of Attachments**	10
		Total No. of Pages	20
Notes:			
Part 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/Group Name	DOS	Super bills	Attachements	Total Pages	Prepared By	Date Prepared	Received By	Date Received	Posted By	Date Posted	Comment	Argus Comment
1289381	Hospital	Access PCP,Inc/	06/11/2023 - 06/11/2023	10	10	20	Bhupender Singh	06/12/2023	Rekha Mehral	06/12/2023				
1289380	Office	ABC/San Bartolome, Mario	06/01/2023 - 06/01/2023	4	5	9	Bhupender Singh	06/10/2023	Shivam Kaushik	06/10/2023		06/10/2023		
1289379	Hospital	Abary, Alexander/	06/06/2023 - 06/06/2023	2	3	5	Bhupender Singh	06/08/2023	Shivam Kaushik	06/06/2023		06/08/2023	Test	Test
1289378	Office	Elite Cardio - Dehghani, Hossein/Prohealth	06/07/2023 - 06/07/2023	5	2	7	Bhupender Singh	06/08/2023	Abhishek Kaushal	06/08/2023	Abhishek Kaushal	06/08/2023		
1289376	Hospital	Abary, Alexander/	06/04/2023 - 06/08/2023	1	1	2	Bhupender Singh	06/08/2023	Balwinder Singh	06/08/2023				
1289375	CAP	Abbasi, Abdul/Prohealth	05/27/2023 - 05/27/2023	1	1	2	Bhupender 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.

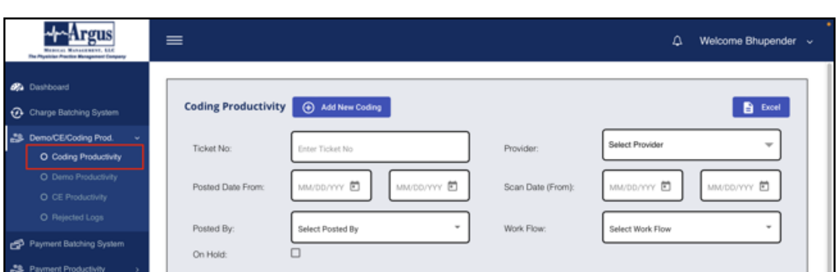


Figure no:

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.

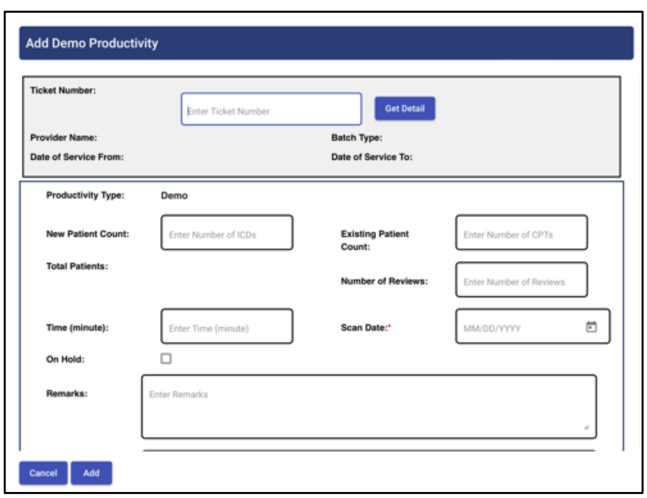


Figure .: Add Coding Productivity – Action

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.

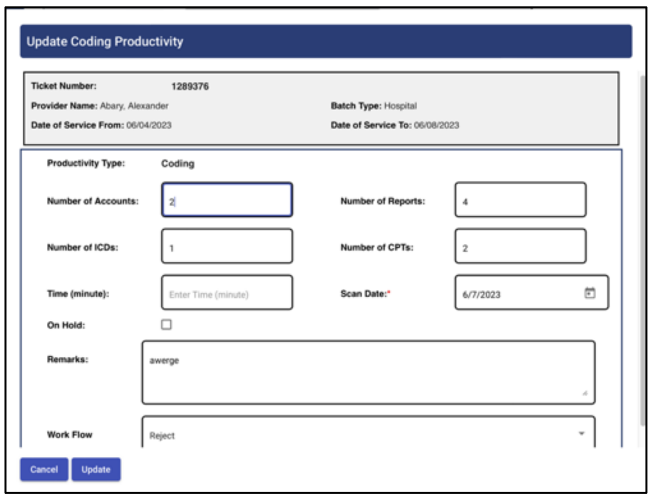


Figure .: Edit/Update Coding Productivity– Action

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.

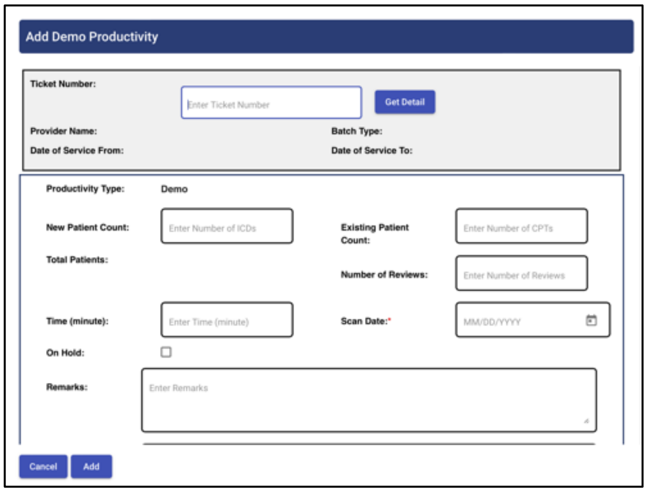


Figure .: Add Demo Productivity – Action

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.

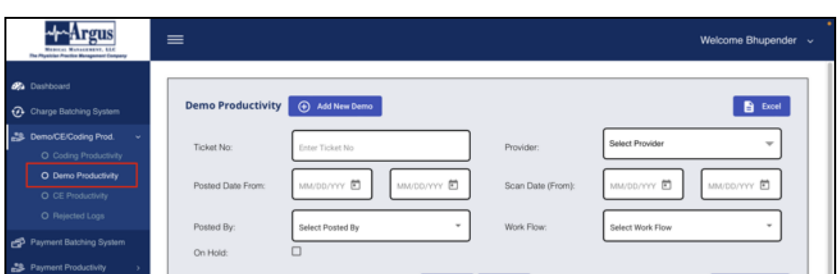


Figure no:

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.

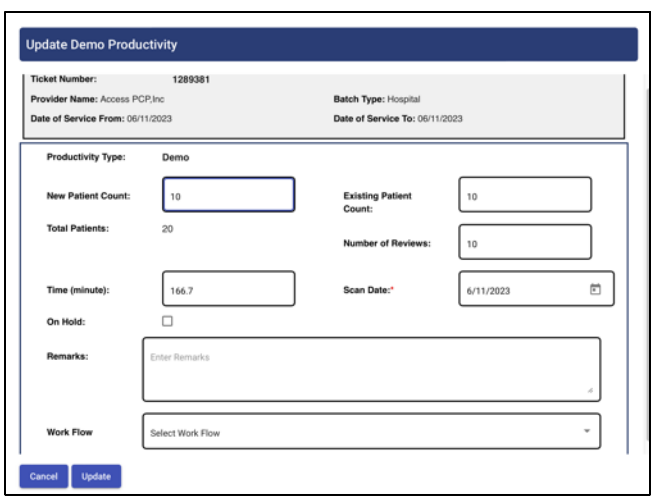


Figure .: Edit/Update Demo Productivity– Action

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: .

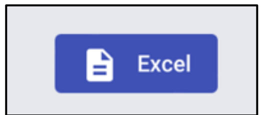


Figure no:

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
10663	2023/06/11	166.7		False		10	0	20	Demo	Bhupender Singh	2023/06/12	Bhupender S	2023/06/12
10662	2023/06/12	33.34	Payment Reversal	True		1	0	4	Demo	Riya Chaudhary	2023/06/12	Riya Chaudh	2023/06/12
10655	2023/05/24	16.67	Reject	False		1	0	2	Demo	Riya Chaudhary	2023/05/24	Riya Chaudh	2023/05/24
10654	2023/05/23	16.67	Payment Reversal	False	test	2		2	Demo	Bhupender Singh	2023/05/23	null null	1970/01/01
10648	2023/05/03	16.67	Reject	False	test	2	0	0	Demo	Riya Chaudhary	2023/05/03	Riya Chaudh	2023/05/23
10637	2023/04/27	16.67	Reject	False	rtgtfgf	2	0	0	Demo	Riya Chaudhary	2023/04/28	Riya Chaudh	2023/05/24
10636	2023/04/26	26.67	Internal	True	test	2	0	0	Demo	Riya Chaudhary	2023/04/26	Riya Chaudh	2023/06/12
10634	2023/04/21	33.34	Internal	True	test		0	0	Demo	Bhupender Singh	2023/04/21	Bhupender S	2023/05/04
10632	2023/04/04	30	Internal	False	rem				Demo	Bhupender Singh	2023/04/04	null null	1970/01/01
10630	2023/03/21	34	Internal	False	test		0	0	Demo	Bhupender Singh	2023/03/29	Bhupender S	2023/04/07
10626	2023/03/06	22	Internal	False	test		3		Demo	Bhupender Singh	2023/03/06	Bhupender S	2023/03/06
10620	2023/03/03	16.67	Internal	False	test		2	0	Demo	Bhupender Singh	2023/03/03	Bhupender S	2023/04/21
10619	2023/03/01	16.67	Internal	False	test 1	2	5	0	Demo	Bhupender Singh	2023/03/01	Bhupender S	2023/05/03
10615	2023/02/22	23.34	Reject	False	test 1 NO Cl	2	1	3	Demo	Bhupender Singh	2023/02/28	Bhupender S	2023/05/17
10611	2023/02/22	22	Argus TL	False	test		2	0	Demo	Bhupender Singh	2023/02/23	Bhupender S	2023/03/09
10610	2023/02/22	44	Internal	False	test rejct		2	0	Demo	Bhupender Singh	2023/02/23	Bhupender S	2023/04/18
10608	2023/02/22	1	Argus TL	False	test		2	0	Demo	Bhupender Singh	2023/02/22	Bhupender S	2023/03/09
10605	2023/02/20	16.67	Internal	False	test1	1	2	0	Demo	Riya Chaudhary	2023/02/20	Riya Chaudh	2023/06/12
10520	2014/01/02	33.34	Internal	False	test	2	4	0	Demo	Bhupender Singh	2014/01/03	Bhupender S	2023/05/01
10519	2014/01/02	50		False			5	0	Demo	Poonam Chowdhary	2014/01/03	null null	1970/01/01
10518	2014/01/02	30		False			3	0	Demo	Poonam Chowdhary	2014/01/03	null null	1970/01/01
10517	2014/01/02	77		False			7	1	Demo	Poonam Chowdhary	2014/01/03	null null	1970/01/01
10516	2013/12/30	167	Internal	False			8	13	Demo	Poonam Chowdhary	2014/01/03	null null	1970/01/01
10515	2013/12/30	16.67	Internal	False	test	1	7	2	Demo	Bhupender Singh	2014/01/03	Bhupender S	2023/05/05

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/Group Name	Scan date	Created Date	Created By	Time	Number of Reviews	New Patient	Existing Patient	Workflow
1289581	Demo	Access PCP,Inc/	06/11/2023	06/12/2023	Bhupender Singh	166.7	10	0	20	
1289570	Demo	Bell,Maurice/	06/12/2023	06/12/2023	Riya Chaudhary	33.34	1	0	4	Payment Reversal
1289569	Demo	ABC/San Bartolome, Mario	05/24/2023	05/24/2023	Riya Chaudhary	16.67	1	0	2	Reject
1289571	Demo	Abary, Alexander/	05/23/2023	05/23/2023	Bhupender Singh	16.67	2	0	2	Payment Reversal
1289531	Demo	NAFMG (Whittier)/	05/03/2023	05/03/2023	Riya Chaudhary	16.67	2	0	0	Reject
1289559	Demo	Abbasi, Abdul/Prohealth	04/27/2023	04/28/2023	Riya Chaudhary	16.67	2	0	0	Reject
1289560	Demo	ABC/San Bartolome, Mario	04/26/2023	04/26/2023	Riya Chaudhary	26.67	2	0	0	Internal
1289545	Demo	Seard, Melvin/Prohealth	04/21/2023	04/21/2023	Bhupender Singh	33.34		0	0	Internal
1289555	Demo	Abbasi, Abdul/Prohealth	04/04/2023	04/04/2023	Bhupender Singh	30		0	0	Internal
1289553	Demo	ABC/San Bartolome, Mario	03/21/2023	03/29/2023	Bhupender Singh	34		0	0	Internal
1289547	Demo	ProHealth/	03/06/2023	03/06/2023	Bhupender Singh	22		3	0	Internal
1289542	Demo	Seard, Melvin/Prohealth	03/03/2023	03/03/2023	Bhupender Singh	16.67		2	0	Internal
1289541	Demo	ProHealth/	03/01/2023	03/01/2023	Bhupender Singh	16.67	2	5	0	Internal
1289540	Demo	ProHealth/	02/22/2023	02/28/2023	Bhupender Singh	23.34	2	1	3	Reject
1289532	Demo	NAFMG (Whittier)/	02/22/2023	02/23/2023	Bhupender Singh	22		2	0	Argus TL
1289517	Demo	NAFMG (Whittier)/	02/22/2023	02/23/2023	Bhupender Singh	44		2	0	Internal
1289519	Demo	Ibarra, Rodolfo/Prohealth	02/22/2023	02/22/2023	Bhupender Singh	1		2	0	Argus TL
1289523	Demo	ProHealth/	02/20/2023	02/20/2023	Riya Chaudhary	16.67	1	2	0	Internal
1008670	Demo	Facey Medical Group Inc/	01/02/2014	01/03/2014	Bhupender Singh	33.34	2	4	0	Internal
1008669	Demo	Facey Medical Group Inc/	01/02/2014	01/03/2014	Poonam Chowdhary	50		5	0	
1008668	Demo	Facey Medical Group Inc/	01/02/2014	01/03/2014	Poonam Chowdhary	30		3	0	
1008672	Demo	Facey Medical Group Inc/	01/02/2014	01/03/2014	Poonam Chowdhary	77		7	1	
1008607	Demo	Chambers, Gregory VC/	12/30/2013	01/03/2014	Poonam Chowdhary	167		8	13	Internal
1008608	Demo	Chambers, Gregory VC/	12/30/2013	01/03/2014	Bhupender Singh	16.67	1	7	2	Internal
1008611	Demo	Chambers, Gregory VC/	12/30/2013	01/03/2014	Poonam Chowdhary	80		6	3	
1008610	Demo	Chambers, Gregory VC/	12/30/2013	01/03/2014	Poonam Chowdhary	40		0	6	
1008609	Demo	Chambers, Gregory VC/	12/30/2013	01/03/2014	Poonam Chowdhary	40		4	0	
1008606	Demo	Chambers, Gregory VC/	12/30/2013	01/03/2014	Poonam Chowdhary	77		5	4	Internal
1008605	Demo	Chambers, Gregory VC/	12/30/2013	01/03/2014	Raju Kumar	220		16	9	

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.

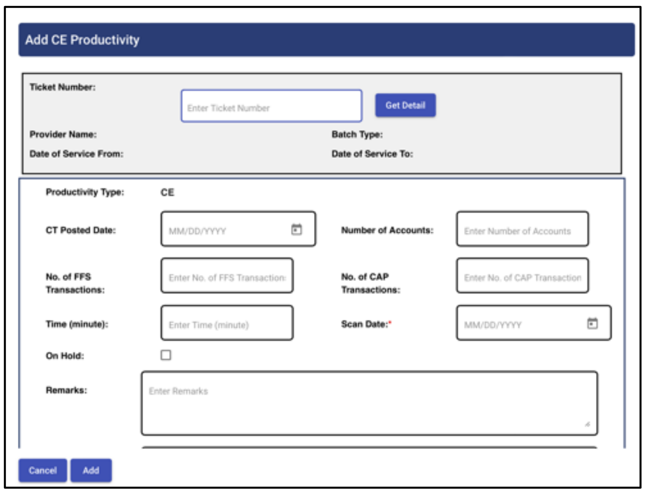


Figure .: Add Coding Productivity – Action

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.

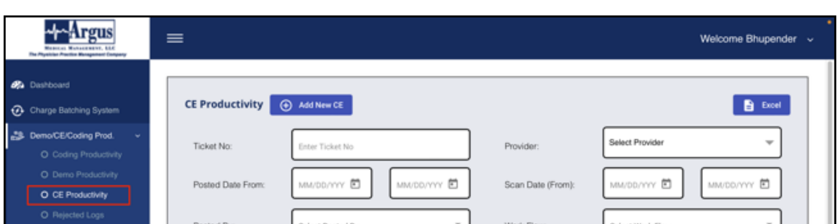


Figure no:

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.

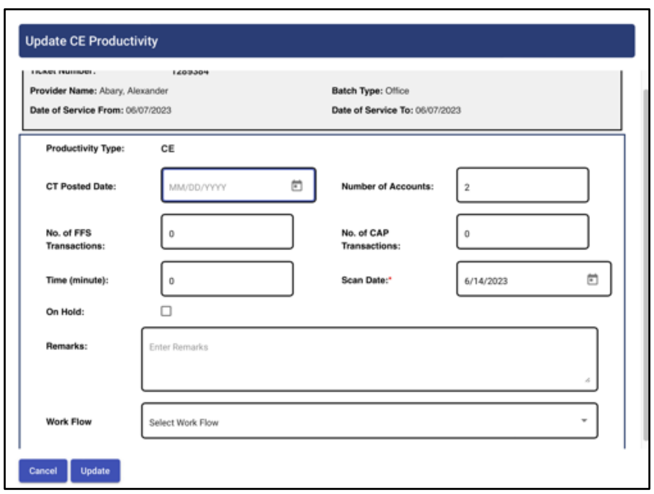


Figure .: Edit/Update Demo Productivity– Action

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: .

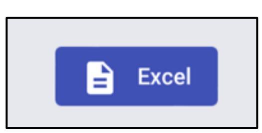


Figure no:

Ticket#	Scan Date	Time	Work Flow	On Hold	Remarks	Number of A	FFS	CAP	Productivity	Created By	Created On	Modified By	Modified On
10665	2023/06/14			False		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	1	CE	Riya Chaudhary	2023/06/10	Riya Chaudhary	2023/06/12
10660	2023/06/08			False		3	2	2	CE	Riya Chaudhary	2023/06/08	Riya Chaudhary	2023/06/12
10659	2023/06/08			False		1	4		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	Test User	2023/05/18	null null	1970/01/01
10633	2023/04/17	30	Internal	False	remark	222	2	2	CE	Bhupender Singh	2023/04/17	Bhupender Singh	2023/05/11
10624	2023/03/06		Internal	True	test charge p	333	1	1	CE	Riya Chaudhary	2023/03/06	Riya Chaudhary	2023/06/12
10609	2023/02/22	11	Internal	False		22	2	2	CE	Bhupender Singh	2023/02/23	Bhupender Singh	2023/04/07
10603	2023/02/17	30	Internal	True	test	1	1	1	CE	Riya Chaudhary	2023/02/17	Riya Chaudhary	2023/06/12
10600	2013/12/31	1	Internal	True		44	2	2	CE	Riya Chaudhary	2014/01/06	Riya Chaudhary	2023/06/12
10593	2014/01/02	11	Reject	False	test	49	1	1	CE	Bhupender Singh	2014/01/06	Bhupender Singh	2023/05/15
10592	2014/01/02	11	Internal	False	check	1	0	1	CE	Bhupender Singh	2014/01/06	Bhupender Singh	2023/05/05
10591	2014/01/02	11	Internal	False	check	2	0	2	CE	Bhupender Singh	2014/01/06	Bhupender Singh	2023/05/04
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	Shallu Agawari	2014/01/06	null null	1970/01/01
10587	2013/12/30	5		False		4	0	0	CE	Shallu Agawari	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: .

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	FFS	CAP	Workflow
1289584	CE	Abury, Alexander/	06/14/2023	06/14/2023	Bhupender Singh		2	3	0	
1289583	CE	Abbasi, Abdul/Prohealth	06/14/2023	06/14/2023	Bhupender Singh	2	2	1	1	Reject
1289580	CE	ABC/San Bartolome, Mario	06/10/2023	06/10/2023	Riya Chaudhary		4	4	1	Reject
1289579	CE	Abury, Alexander/	06/08/2023	06/08/2023	Riya Chaudhary		3	2	2	
1289578	CE	Elite Cardio - Dehghani, Hossein/Prohealth	06/08/2023	06/08/2023	Bhupender Singh		1	4	0	
1289571	CE	Abury, Alexander/	05/24/2023	05/24/2023	Riya Chaudhary	60	1	1	1	Argus TL
1289569	CE	ABC/San Bartolome, Mario	05/18/2023	05/18/2023	Test User		1	1	1	Reject
1289559	CE	Abbasi, Abdul/Prohealth	04/17/2023	04/17/2023	Bhupender Singh	30	222	2	2	Internal
1289536	CE	ABC/San Bartolome, Mario	03/06/2023	03/06/2023	Riya Chaudhary		333	1	1	Internal
1289516	CE	Ibarra, Rodolfo/Prohealth	02/22/2023	02/23/2023	Bhupender Singh	11	22	2	2	Internal
1289523	CE	ProHealth/	02/17/2023	02/17/2023	Riya Chaudhary	30	1	1	1	Internal
1008575	CE	Ibarra, Rodolfo/Prohealth	12/31/2013	01/06/2014	Riya Chaudhary	1	44	2	2	Internal
1008644	CE	Chen, Hsiao/	01/02/2014	01/06/2014	Bhupender Singh	11	49	1	1	Reject
1008640	CE	Chen, Hsiao/	01/02/2014	01/06/2014	Bhupender Singh	11	1	0	1	Internal
1008725	CE	NAFMG (Whittier)/	01/02/2014	01/06/2014	Bhupender Singh	11	2	0	2	Internal
1008641	CE	Chen, Hsiao/	01/03/2014	01/06/2014	Asim Mallick		0	32	0	
1008509	CE	Zinar, Daniel/	12/30/2013	01/06/2014	Shallu Agawari	0	0	0	0	
1008508	CE	Zinar, Daniel/	12/30/2013	01/06/2014	Shallu Agawari	5	4	0	0	
1008507	CE	Zinar, Daniel/	12/30/2013	01/06/2014	Shallu Agawari	30	10	0	0	
1008468	CE	Zinar, Daniel/	12/30/2013	01/06/2014	Shallu Agawari	5	3	0	0	
1008488	CE	Hoshino, Christopher/	12/30/2013	01/06/2014	Shallu Agawari	5	3	0	0	
1008610	CE	Chambers, Gregory VC/	12/30/2013	01/06/2014	Shallu Agawari	30	11	0	0	
1008609	CE	Chambers, Gregory VC/	12/30/2013	01/06/2014	Shallu Agawari	10	9	0	0	
1008510	CE	Hoshino, Christopher/	12/30/2013	01/06/2014	Shallu Agawari	30	23	0	0	
1008522	CE	Mendoza, Astrid/	12/30/2013	01/06/2014	Shallu Agawari	5	2	0	0	
1008521	CE	Mendoza, Astrid/	12/30/2013	01/06/2014	Shallu Agawari	15	9	0	0	
1008520	CE	Mendoza, Astrid/	12/30/2013	01/06/2014	Shallu Agawari	20	17	0	0	
1008519	CE	Mendoza, Astrid/	12/30/2013	01/06/2014	Shallu Agawari	30	30	0	0	
1008611	CE	Chambers, Gregory VC/	12/30/2013	01/06/2014	Dawa Tsering	115	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.

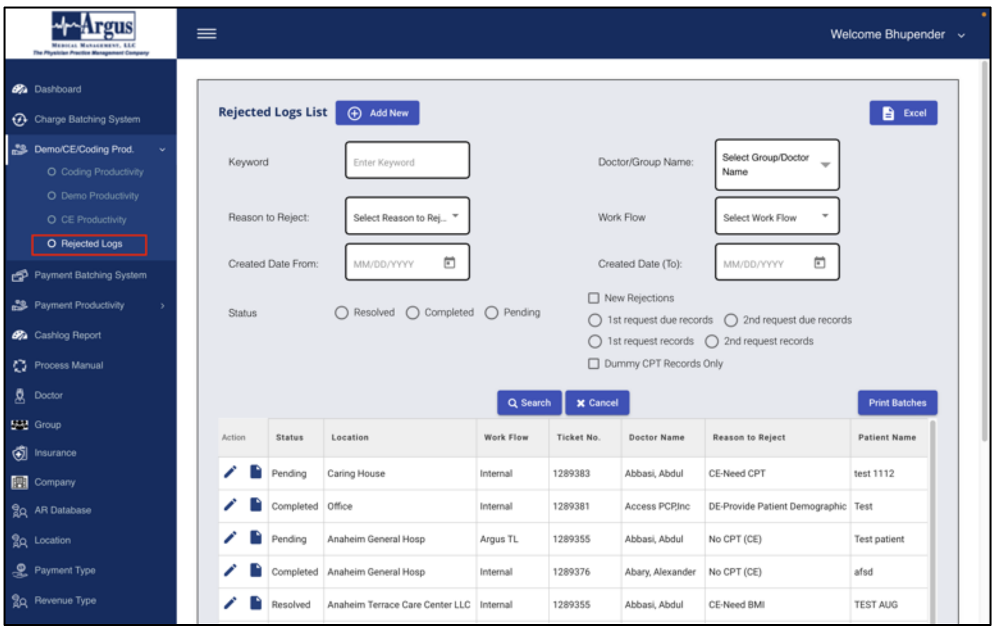


Figure no:

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.

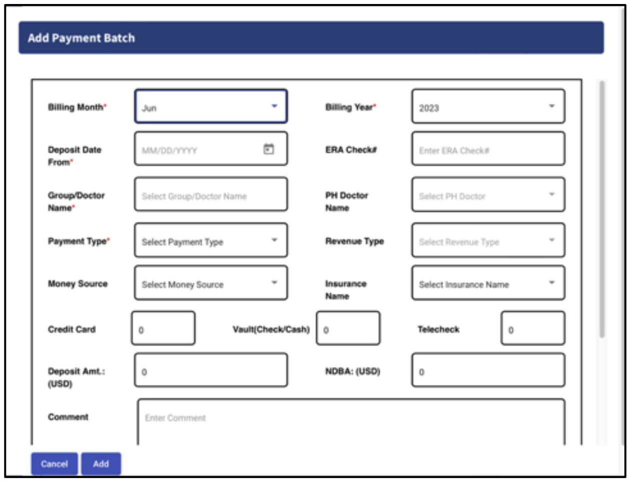


Figure .: Add Payment Batch – Action

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).

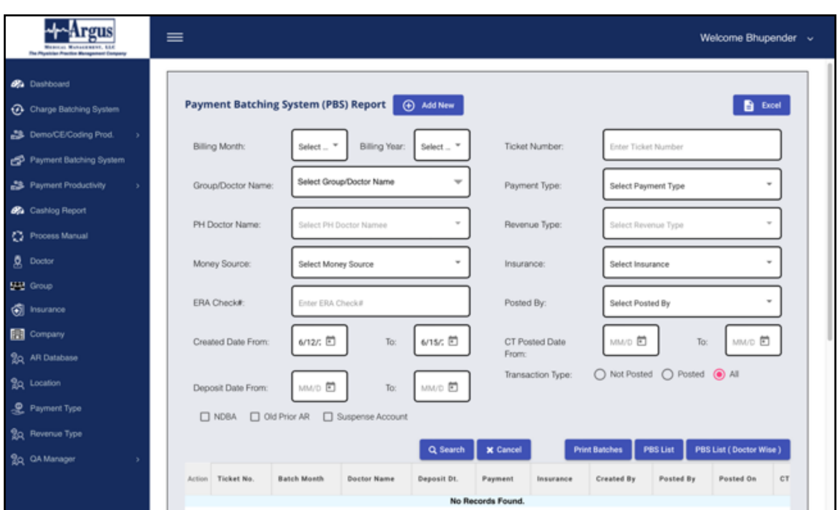


Figure no:

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: .

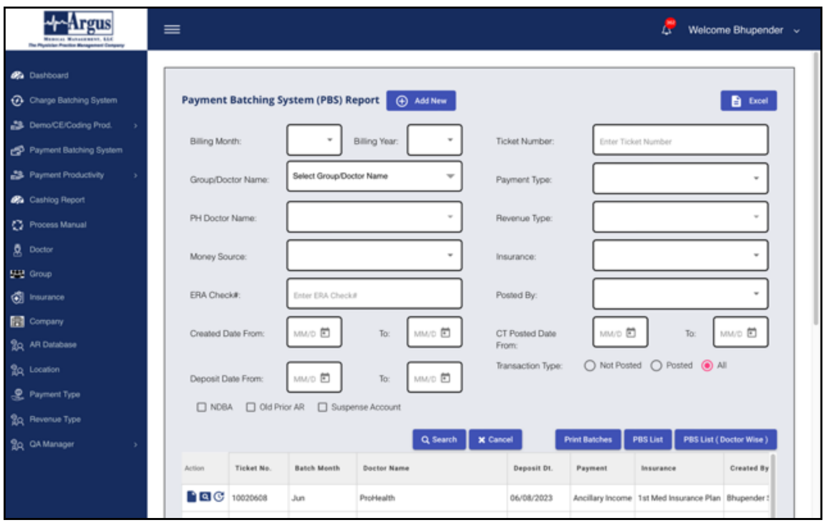


Figure no:

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.

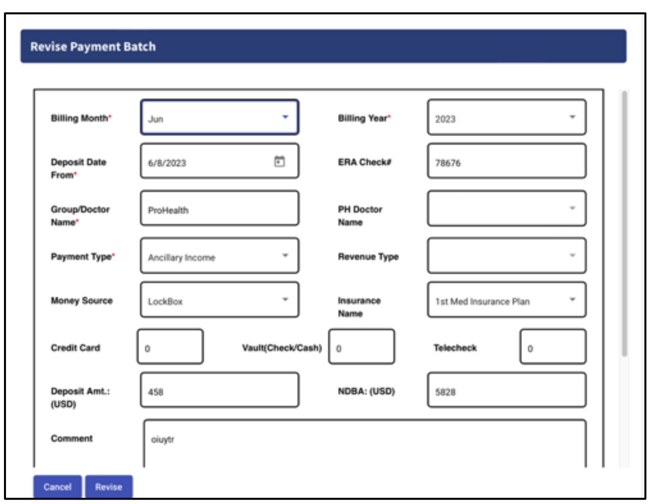


Figure .: Revise Payment Batch– Action

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.

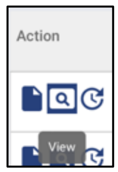


Figure .: View Icon – Action.

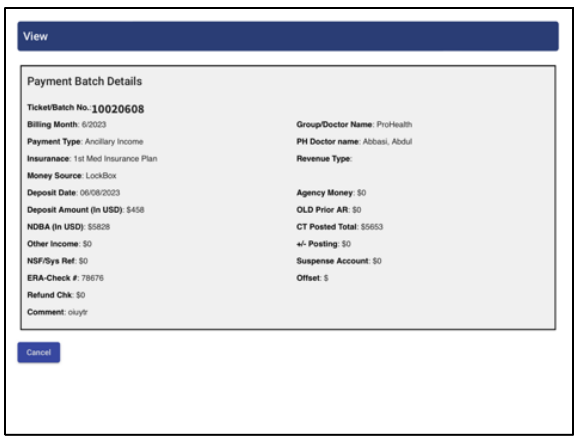


Figure .: View Payment Details – Action

- 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.

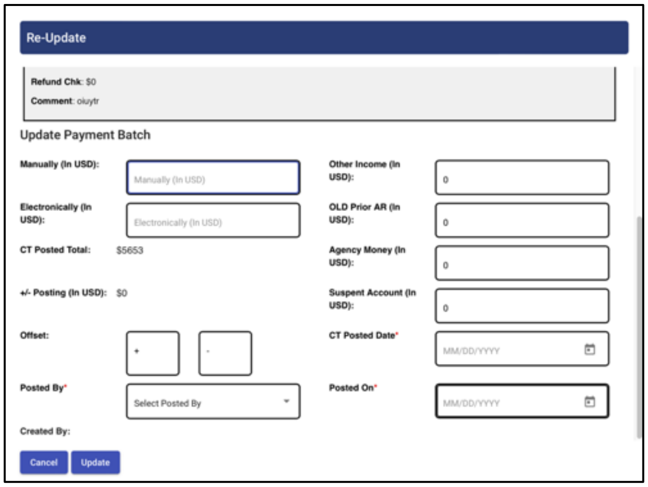


Figure .: Re-Update – Action

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: .

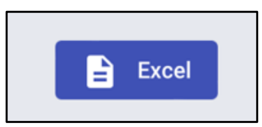


Figure no:

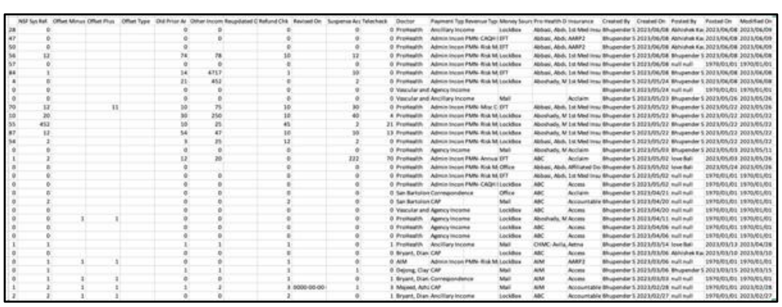
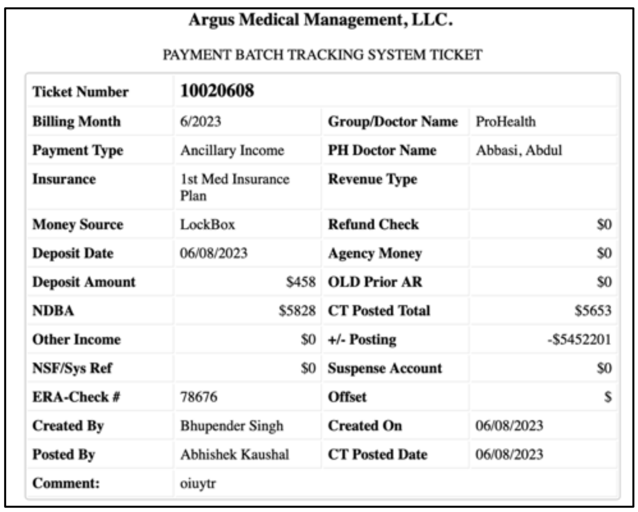


Figure no:

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 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	NDBA	CT Posted Amount	CT Posted Date	Posted By	Payment Type	Insurance	ERA Check #	Comment
10020608	ProHealth	6/2023	06/08/2023	458	5828	5653	06/08/2023	Abhishek Kaushal	Ancillary Income	1st Med Insurance Plan	78676	oiuytr
10020607	ProHealth	6/2023	06/08/2023	8978	8547	1553	06/08/2023	Abhishek Kaushal	Admin Income	AARP2	659832	gfhhgrdj
10020606	ProHealth	6/2023	06/08/2023	455	450	54442	06/08/2023	Abhishek Kaushal	Admin Income	AARP2	6868	oiuytrew
10020605	ProHealth	6/2023	06/08/2023	4585	2256	47999	06/08/2023	Bhupender Singh	Admin Income	1st Med Insurance Plan	000545	
10020604	ProHealth	6/2023	06/07/2023	45820	457	0			Admin Income	1st Med Insurance Plan	00154	test
10020603	ProHealth	6/2023	06/08/2023	245	584	14550	06/08/2023	Bhupender Singh	Admin Income	1st Med Insurance Plan	125565484	testing remarks onlyyy
10020602	ProHealth	5/2023	05/23/2023	45	4	32	06/08/2023	Bhupender Singh	Admin Income	1st Med Insurance Plan	547272	fgg
10020600	Vascular and General Surgery Associates	5/2023	05/24/2023	333	0	0			Agency Income			
10020599	Vascular and General Surgery Associates	5/2023	05/23/2023	233	0	0		Bhupender Singh	Ancillary Income	Acclaim	21	test
10020598	ProHealth	5/2023	05/22/2023	700	70	950	05/22/2023	Bhupender Singh	Admin Income	1st Med Insurance Plan	36595	test
10020597	ProHealth	5/2023	05/22/2023	500	10	525	05/22/2023	Bhupender Singh	Admin Income	1st Med Insurance Plan	453236	dsgfdeaf
10020596	ProHealth	5/2023	05/22/2023	4255	455	4612	05/22/2023	Bhupender Singh	Admin Income	1st Med Insurance Plan	563546	refere the
10020595	ProHealth	5/2023	05/22/2023	4577	87	5879	05/22/2023	Bhupender Singh	Admin Income	1st Med Insurance Plan	53758	testtg
10020594	ProHealth	5/2023	05/21/2023	4578	254	266	05/22/2023	Bhupender Singh	Admin Income	1st Med Insurance Plan	424375	testing
10020591	ProHealth	5/2023	05/03/2023	222	0	222		Bhupender Singh	Agency Income	Acclaim	2	test
10020590	ProHealth	1/2021	05/02/2023	5228	1	21		love Bali	Admin Income	Acclaim	5	
10020589	ProHealth	1/2023	05/02/2023	0	0	0		love Bali	Admin Income	Affiliated Doctors of OC	2s	
10020588	ProHealth	1/2022	05/02/2023	0	0	0			Admin Income	1st Med Insurance Plan	123	
10020587	ProHealth	5/2023	05/01/2023	200	0	0			Admin Income	Access	2	test
10020586	San Bartolome, Mario	4/2023	04/20/2023	200	0	0			Correspondence	Acclaim	3	test
10020585	San Bartolome, Mario	4/2023	04/20/2023	22	0	0			CAP	Accountable Health	2	test
10020584	Vascular and General Surgery Associates	4/2023	04/20/2023	0	0	0			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	NDBA	CT Posted Amount	CT Posted Date	Posted By	Payment Type	Insurance	ERA Check #	Comment
10020608	ProHealth	6/2023	06/08/2023	458	5828	5653	06/08/2023	Abhishek Kaushal	Ancillary Income	1st Med Insurance Plan	78676	oiuytr
10020607	ProHealth	6/2023	06/08/2023	8978	8547	1553	06/08/2023	Abhishek Kaushal	Admin Income	AARP2	659832	gfhhgrdj
10020606	ProHealth	6/2023	06/08/2023	455	450	54442	06/08/2023	Abhishek Kaushal	Admin Income	AARP2	6868	oiuytrew
10020605	ProHealth	6/2023	06/08/2023	4585	2256	47999	06/08/2023	Bhupender Singh	Admin Income	1st Med Insurance Plan	000545	
10020604	ProHealth	6/2023	06/07/2023	45820	457	0			Admin Income	1st Med Insurance Plan	00154	test
10020603	ProHealth	6/2023	06/08/2023	245	584	14550	06/08/2023	Bhupender Singh	Admin Income	1st Med Insurance Plan	125565484	testing remarks onlyyy
10020602	ProHealth	5/2023	05/23/2023	45	4	32	06/08/2023	Bhupender Singh	Admin Income	1st Med Insurance Plan	547272	fgg
10020600	Vascular and General Surgery Associates	5/2023	05/24/2023	333	0	0			Agency Income			
10020599	Vascular and General Surgery Associates	5/2023	05/23/2023	233	0	0		Bhupender Singh	Ancillary Income	Acclaim	21	test
10020598	ProHealth	5/2023	05/22/2023	700	70	950	05/22/2023	Bhupender Singh	Admin Income	1st Med Insurance Plan	36595	test
10020597	ProHealth	5/2023	05/22/2023	500	10	525	05/22/2023	Bhupender Singh	Admin Income	1st Med Insurance Plan	453236	dsgfdeaf
10020596	ProHealth	5/2023	05/22/2023	4255	455	4612	05/22/2023	Bhupender Singh	Admin Income	1st Med Insurance Plan	563546	refere the
10020595	ProHealth	5/2023	05/22/2023	4577	87	5879	05/22/2023	Bhupender Singh	Admin Income	1st Med Insurance Plan	53758	testtg
10020594	ProHealth	5/2023	05/21/2023	4578	254	266	05/22/2023	Bhupender Singh	Admin Income	1st Med Insurance Plan	424375	testing
10020591	ProHealth	5/2023	05/03/2023	222	0	222		Bhupender Singh	Agency Income	Acclaim	2	test
10020590	ProHealth	1/2021	05/02/2023	5228	1	21		love Bali	Admin Income	Acclaim	5	
10020589	ProHealth	1/2023	05/02/2023	0	0	0		love Bali	Admin Income	Affiliated Doctors of OC	2s	
10020588	ProHealth	1/2022	05/02/2023	0	0	0			Admin Income	1st Med Insurance Plan	123	
10020587	ProHealth	5/2023	05/01/2023	200	0	0			Admin Income	Access	2	test
10020586	San Bartolome, Mario	4/2023	04/20/2023	200	0	0			Correspondence	Acclaim	3	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.

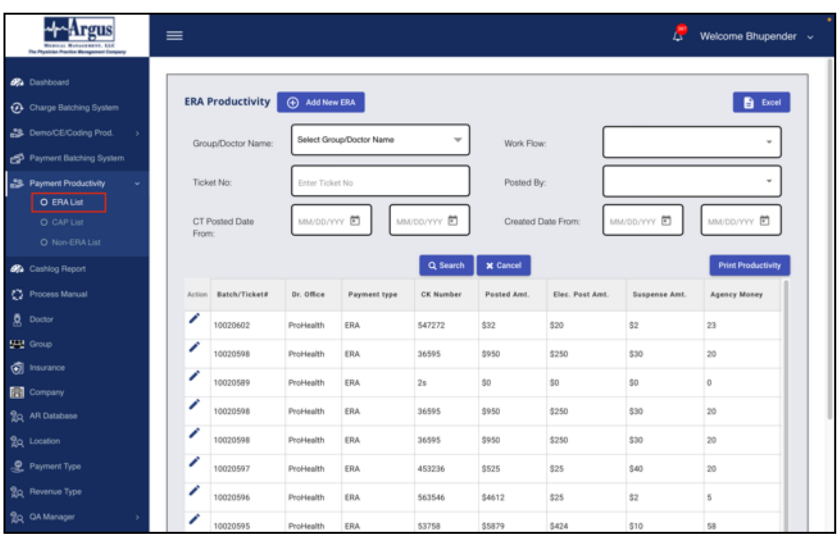


Figure no:

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.

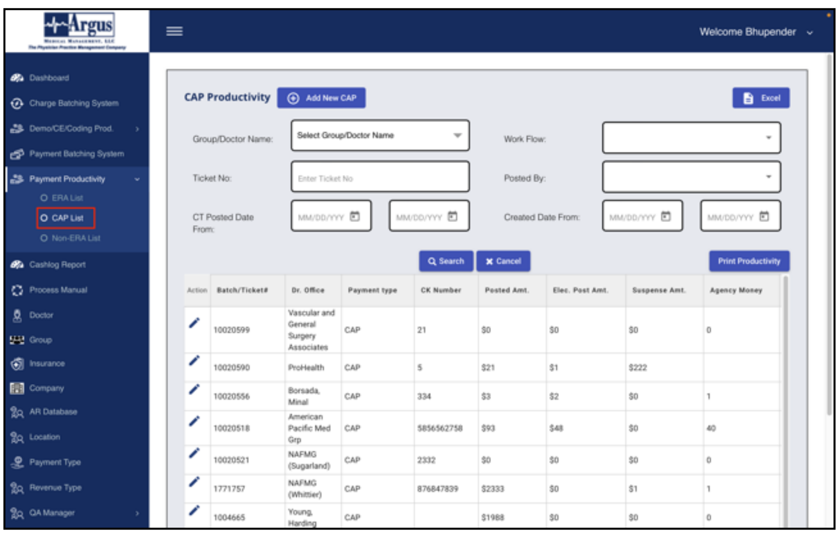


Figure no:

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.

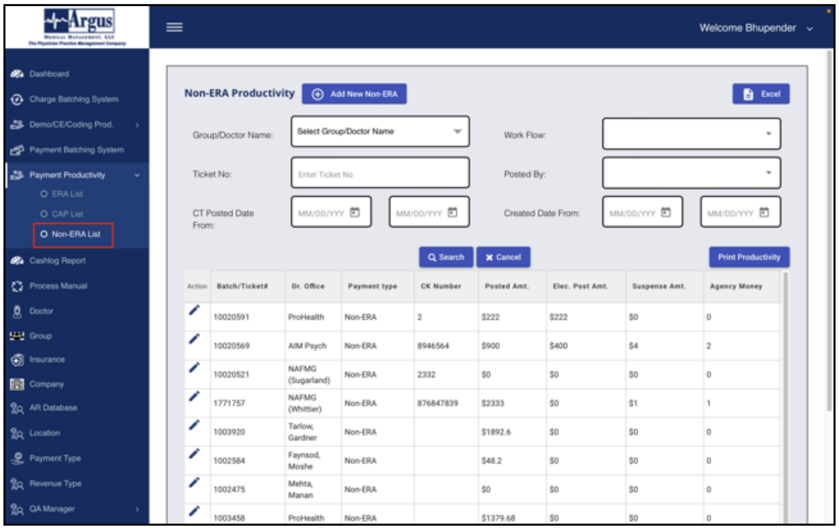


Figure no:

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).

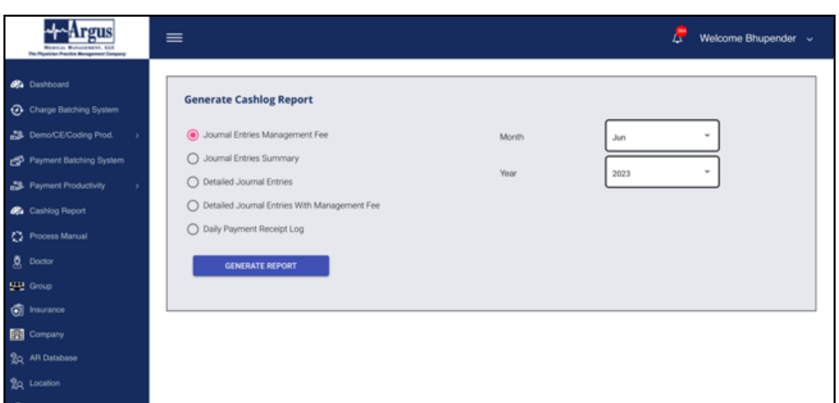


Figure no:

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.

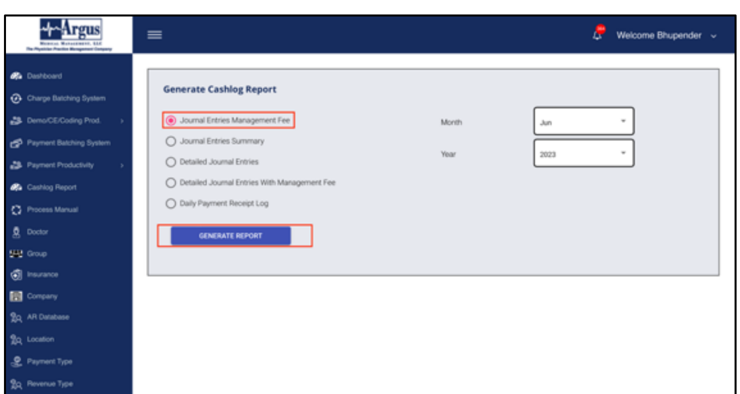


Figure: 5.1 Generate Cashlog Report

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.

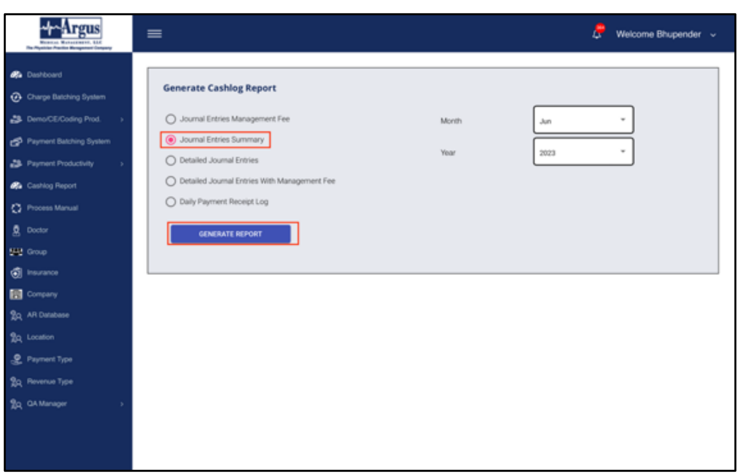


Figure: 5.1 Generate Cashlog Report

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.

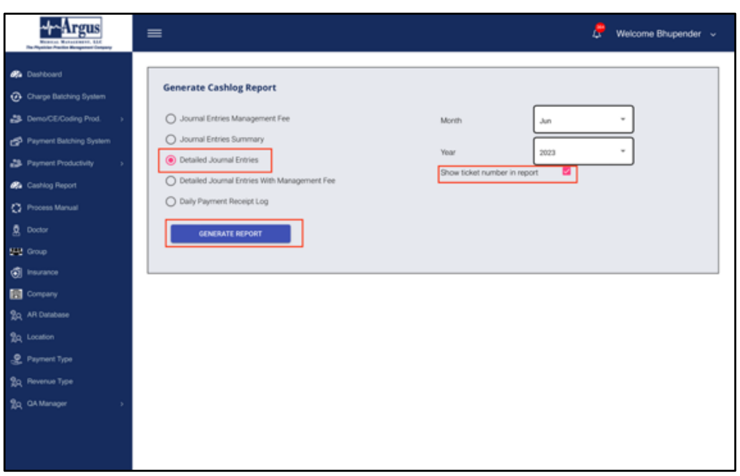


Figure: 5.1 Generate Cashlog Report

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.

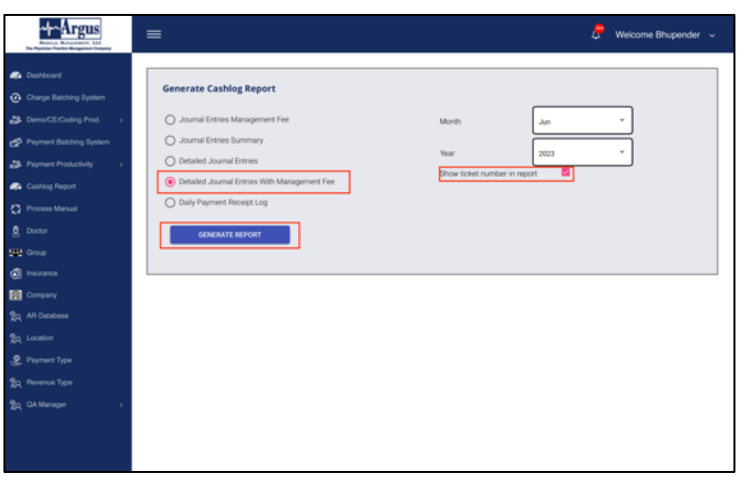


Figure: 5.1 Generate Cashlog Report

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.

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.

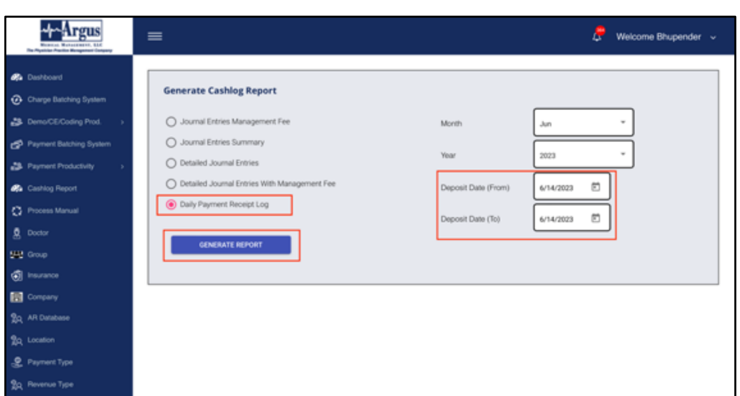


Figure: 5.1 Generate Cashlog Report

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.

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.

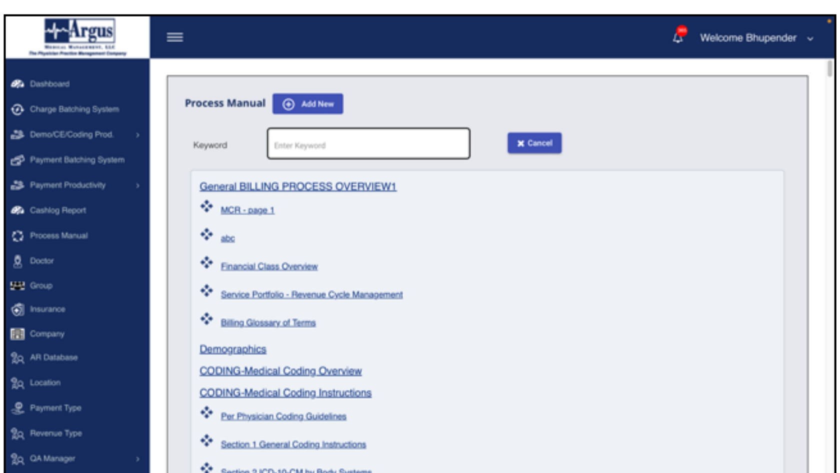


Figure no:

Process Manual menu will display the Main sections and their Sub-Section as shown below in figure: .

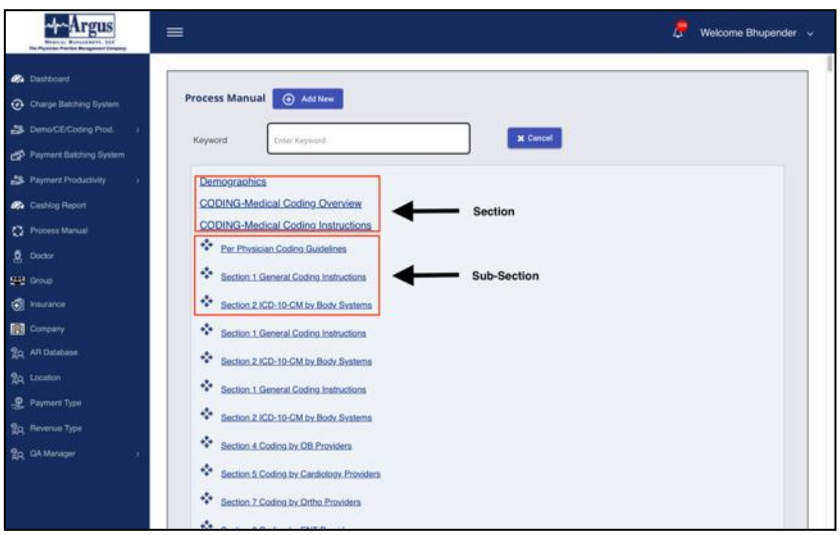


Figure no:

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:.

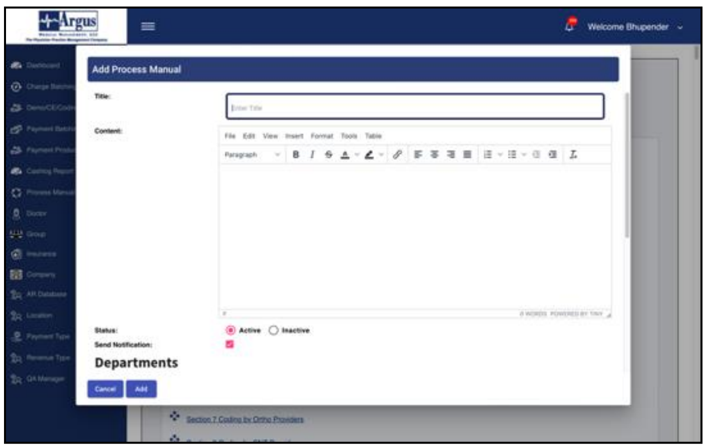


Figure no:

User will also be required to select the Departments from the listed checkbox options as shown below in figure:.

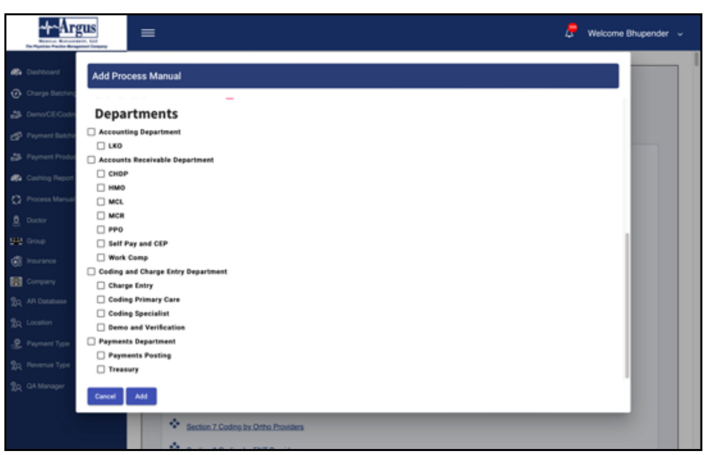


Figure no:

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:.

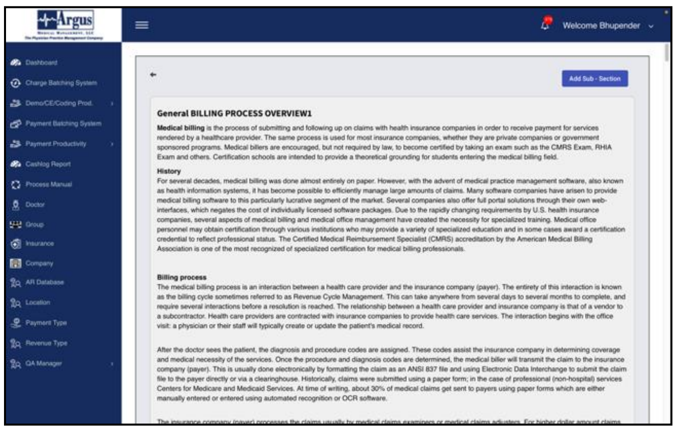


Figure no:

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"

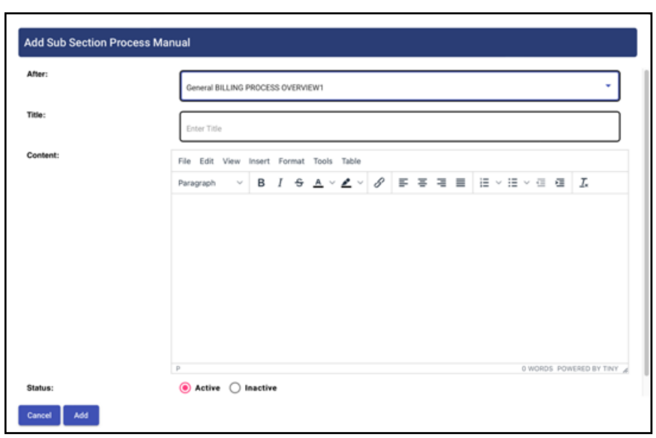


Figure no:

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: ..

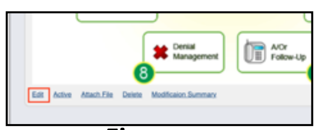


Figure no:

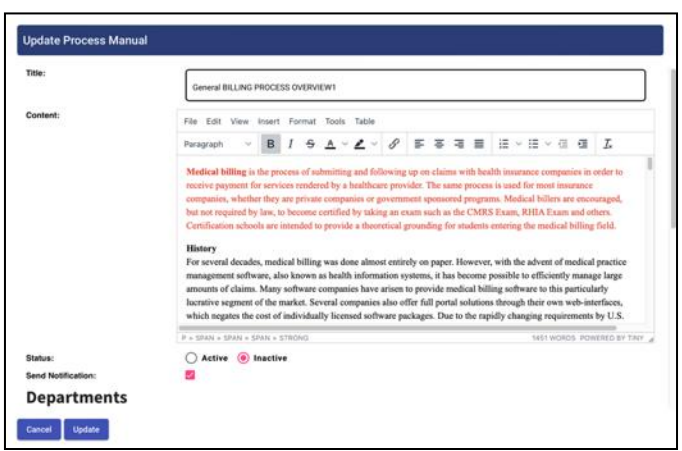


Figure no:

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.

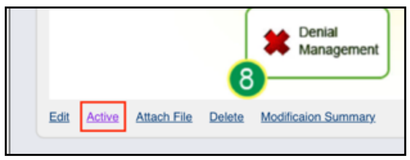


Figure no:

- 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:

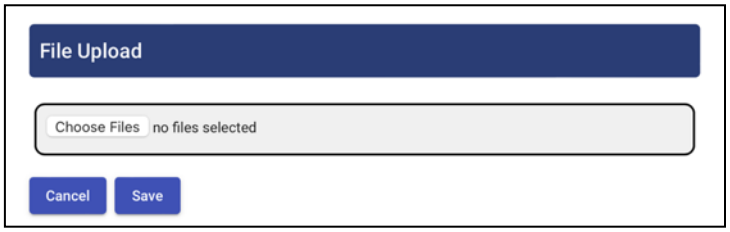


Figure no:

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.

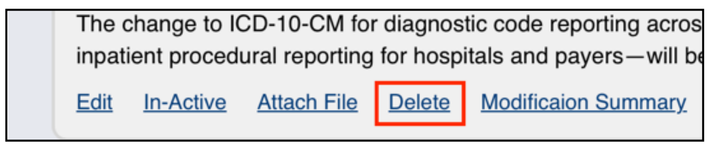


Figure no:

- 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: ..

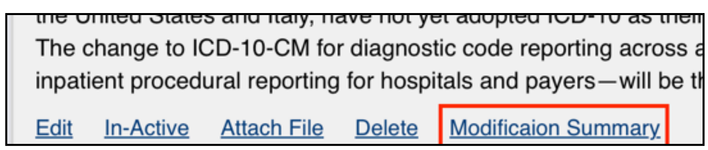


Figure no:

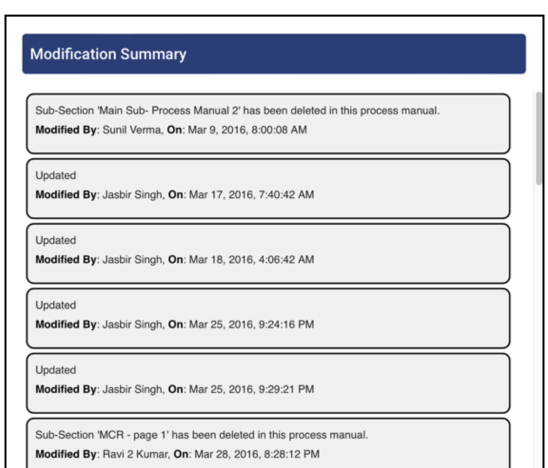


Figure no:

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: ..

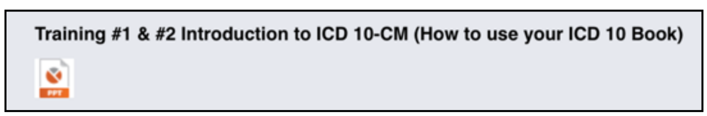


Figure no:

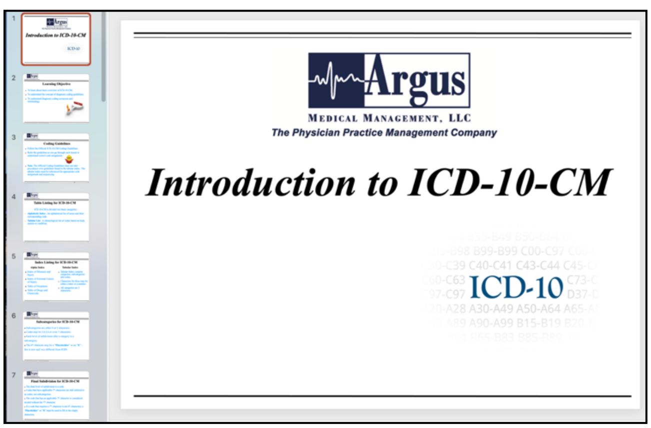


Figure no:

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

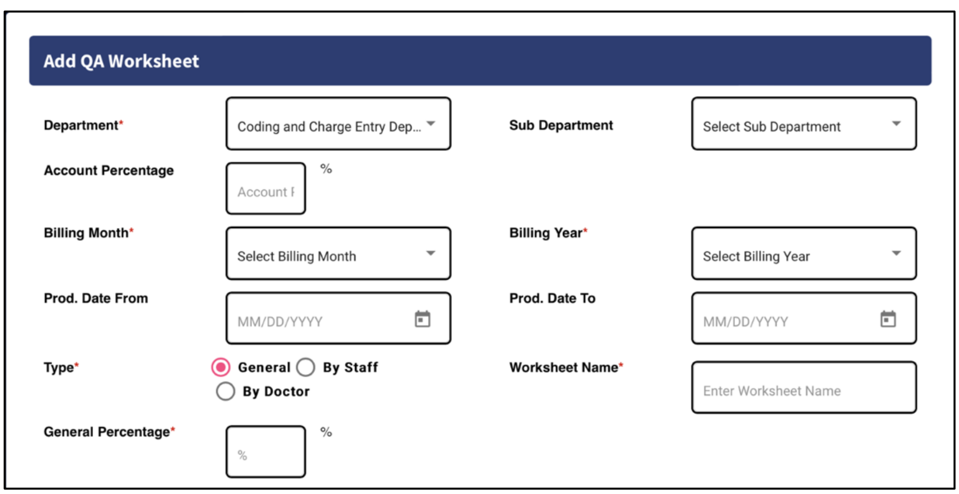


Figure no:

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 changed and on the click of “Cancel” all the changes made will be discarded.

After selecting “**Payments Department**” from “Department” drop-down menu.

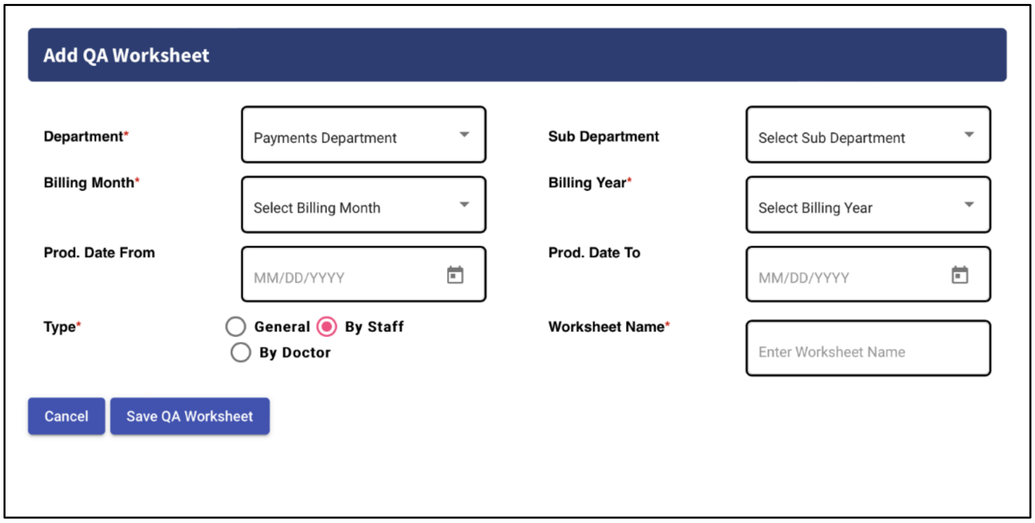


Figure no:

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 changed and on the click of “Cancel” all the changes made will be discarded.

After selecting “**Accounts Receivable Department**” from “Department” drop down menu.

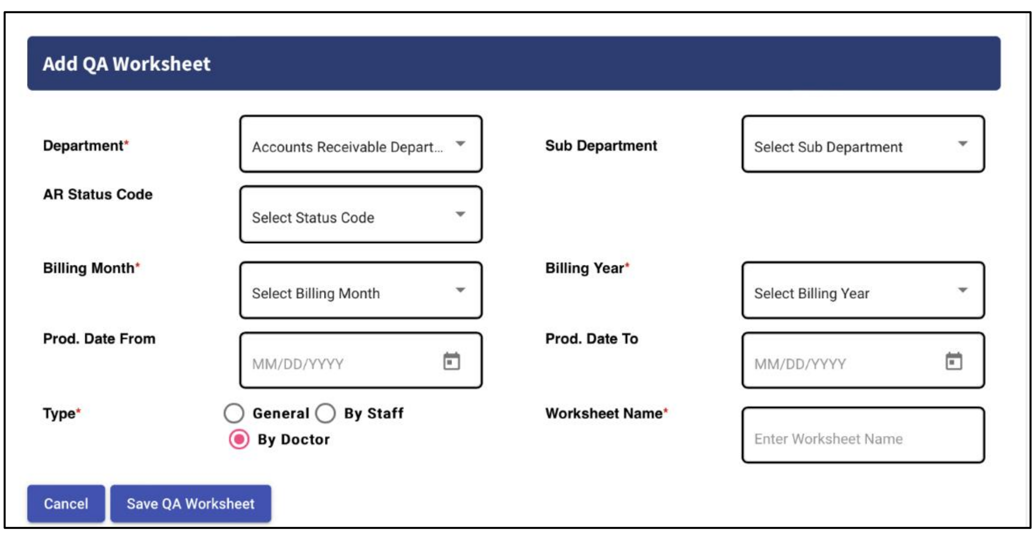


Figure no:

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 changed 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.

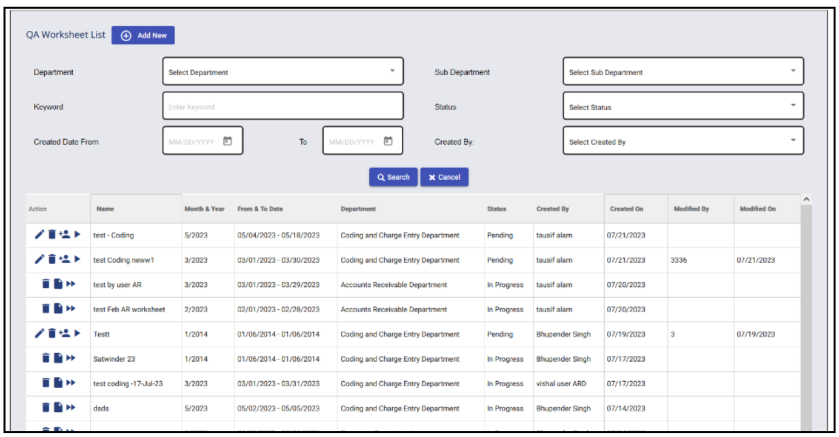


Figure no:

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.

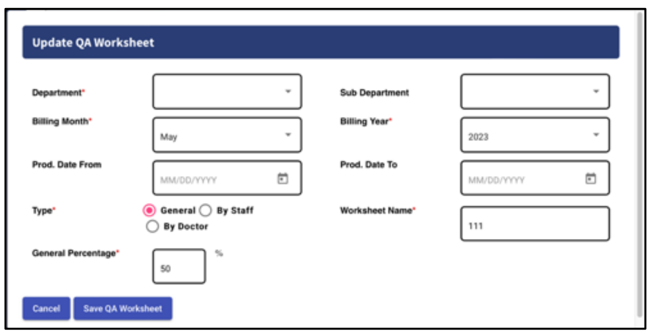


Figure .: Update QA Worksheet– Action

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.

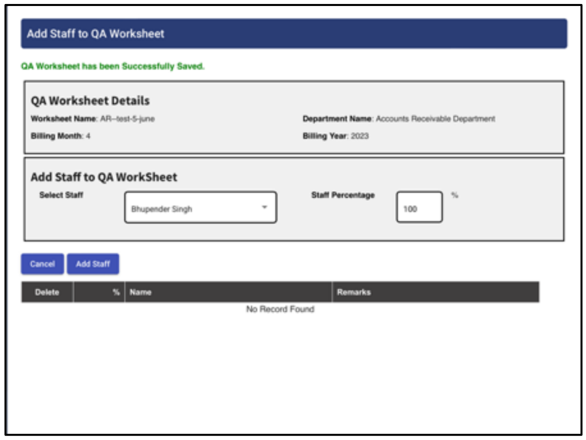


Figure .: Add Staff to QA worksheet – Action

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: .

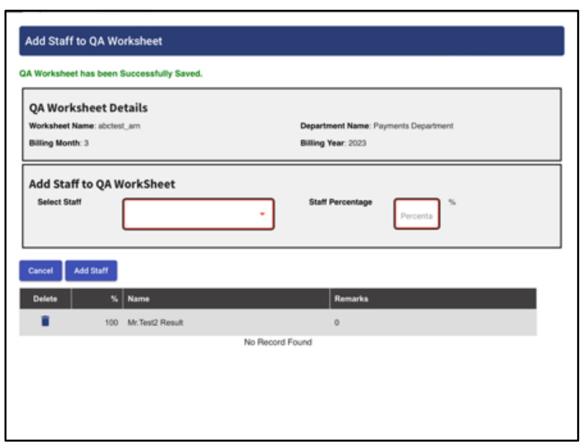


Figure .: Add Staff to QA worksheet – Action

- 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.

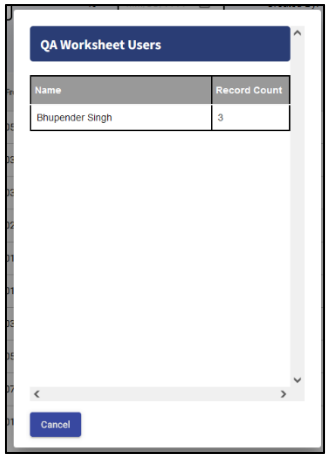


Figure .: QA Worksheet Users – Action

- Delete: Selecting "Delete QA" Icon as shown below in Figure , will allow user to delete the selected QA Worksheet.

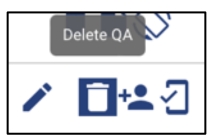


Figure .: Delete Icon – Action.

- 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.

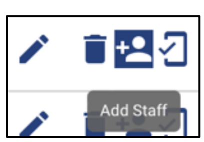


Figure .: Add Staff Icon – Action.

- Execute Worksheet: Selecting "Execute Worksheet" Icon as shown below in Figure , will allow user to Execute the selected QA Worksheet.

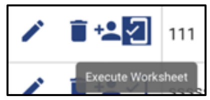


Figure .: Execute Worksheet – Action.

- Continue Worksheet: Selecting "Continue Worksheet" Icon as shown below in Figure , will allow user to view Continue Worksheet Details as shown below in Figure:. .

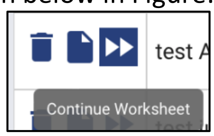


Figure .: Continue Worksheet – Action.

Figure .: Continue AR QA Worksheet Detail – Action

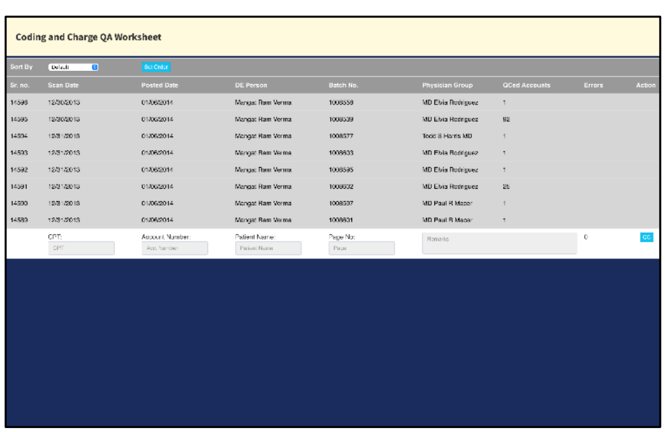


Figure .: Continue Coding and Charge QA Worksheet Detail – Action

ss

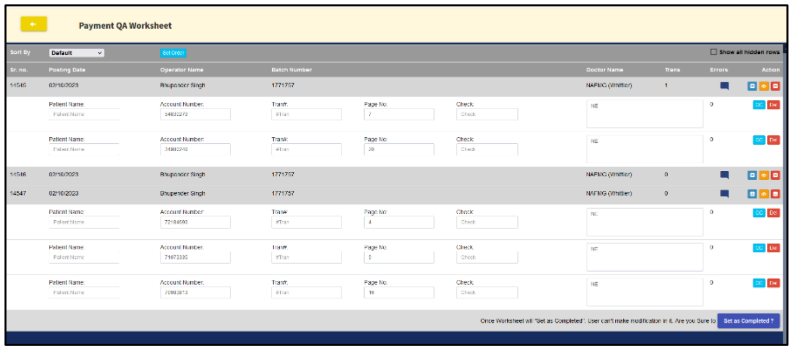


Figure .: Continue Payment QA Worksheet Detail – Action

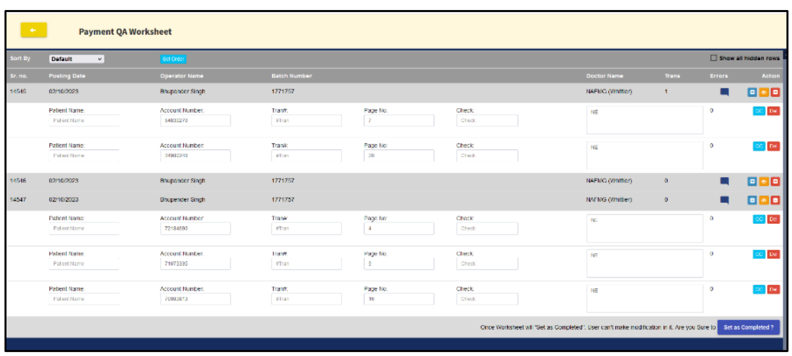


Figure .: Continue Payment QA Worksheet Detail – Action

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.

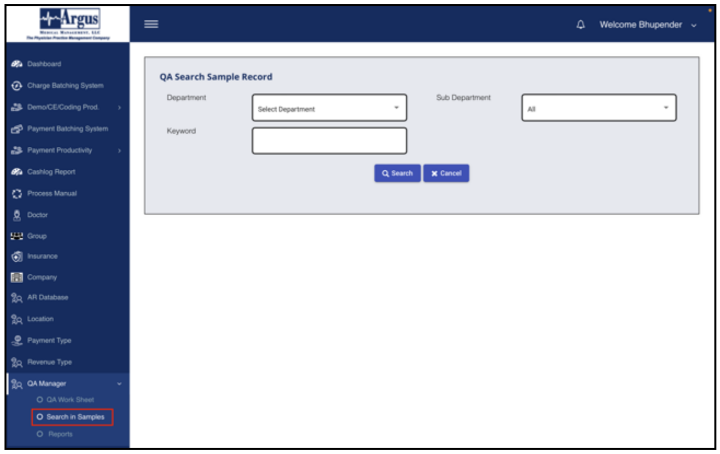


Figure no:

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.

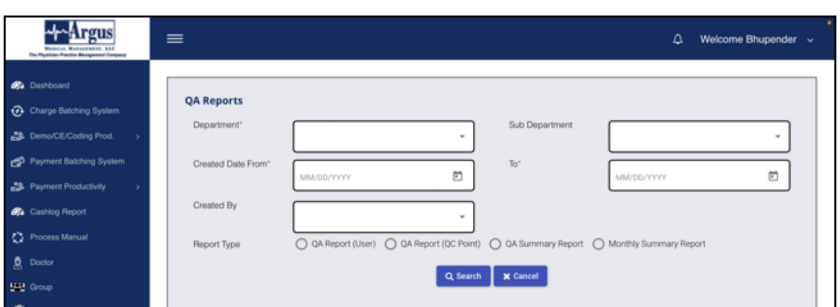


Figure no:

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.