

Kindbody

Azalea - Manual

Version History

Date	Version	Updated by
12/02/21	1.0 - Implementation Manual	Solounge Bowen
2/15/22	2.0 - Updated with finalized interface, workflows for go-live	Michelle Proctor

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System References

Kindbody Azalea Roles

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Azalea Role	Kindbody User
Front Desk	Front Desk, CX, Clinic Director, Clinic Manager
RCM Team	Billing Posters, AR, Financial Coordinators
Reports - View Only	Executives, Finance, BI
Admin	

System Workflows

Kindbody Staff Interface

Assign DX Codes to a Patient's profile

1. Click the [Encounters](#) tab on the main menu's toolbar to display the Encounter's list



KINDBODY SANDBOX													
		Diagnosis		Procedure									
Go	Reset	Filter:	Save As										
<input type="checkbox"/>	Encounter	Patient	DOS ↓	Provider	Location	Primary Insurance	Status	Initial Billed	Last Billed	Balance	Encounter Next Payer	Action Date	Actions
<input type="checkbox"/>	#KSG21A1	Rachelle	11/30/2021	Unknown Doctor	ROXBURY SURGERY CENTER	Patient Bill	EMR INCOMPLETE	\$0.00	(NONE)				
<input type="checkbox"/>	#KSG18A1	Lucy	11/18/2021	Unknown Doctor	TEST LOCATION	MVP Health Care	EMR INCOMPLETE	\$100.00	PRIMARY				
<input type="checkbox"/>	#KSG24	Test, Mellinda	11/10/2021	Jessica Auffant, MD	ADVENTHEALTH CELEBRATION	Blue Shield of California	PATIENT CREDIT	(\$2,000.00)	CREDIT				
<input type="checkbox"/>	#KSG16A1	Lucy	11/02/2021	Unknown Doctor	TEST LOCATION	MVP Health Care	EMR INCOMPLETE	\$100.00	PRIMARY				
<input type="checkbox"/>	#KSG3A2	Doe 2, Mark	10/08/2021	Unknown Doctor	TEST LOCATION	United Healthcare Student Resources (Stu)	BILLED	\$100.00	PRIMARY				
<input type="checkbox"/>	#KSG2A3	Test, Mellinda	09/29/2021	Unknown Doctor	HASBROUCK- NY	Patient Bill	READY	11/02/2021	11/02/2021	\$100.00	PATIENT	11/16/2021	
<input type="checkbox"/>	#KSG18A2	Lucy Dee 2	08/27/2021	Unknown Doctor	TEST LOCATION	MVP Health Care	EMR INCOMPLETE	\$100.00	PRIMARY				
<input type="checkbox"/>	#KSG23A1	Lucy	08/25/2021	Unknown Doctor	TEST LOCATION	MVP Health Care	EMR INCOMPLETE	\$0.00	(NONE)				
<input type="checkbox"/>	#KSG6A6	Test Package, Nina	08/15/2021	Unknown Doctor	ATLANTA	United Healthcare	NEW	\$14,460.00	PRIMARY				
<input type="checkbox"/>	#KSG6A5	Test Package, Nina	08/13/2021	Unknown Doctor	TEST LOCATION	United Healthcare	READY	\$371.25	PRIMARY				
<input type="checkbox"/>	#KSG6A3	Test Package, Nina	08/09/2021	Unknown Doctor	TEST LOCATION	United Healthcare	NEW	\$371.25	PRIMARY				
<input type="checkbox"/>	#KSG6A2	Test Package, Nina	08/06/2021	Unknown Doctor	TEST LOCATION	Patient Bill	BILLED	\$200.00	PATIENT				
<input type="checkbox"/>	#KSG6A1	Test Package, Nina	08/03/2021	Unknown Doctor	TEST LOCATION	United Healthcare	NEW	\$541.25	PRIMARY				
<input type="checkbox"/>	#KSG6A10	Test Package, Nina	07/26/2021	Unknown Doctor	TEST LOCATION	United Healthcare	EMR INCOMPLETE	\$150.00	PRIMARY				
<input type="checkbox"/>	#KSG6A9	Test Package, Nina	07/08/2021	Unknown Doctor	ADVENTHEALTH ORLANDO	United Healthcare	EMR INCOMPLETE	\$325.00	PRIMARY				
<input type="checkbox"/>	Test	Unknown	06/23/2021	TEST LOCATION	United Healthcare	NEW		\$341.25	PRIMARY				

2. Once you choose the Patient you'd like to review, click the desired encounter date and click **Edit**

Encounter #KSG2A2 Sep 9 (Patient 29 y.o.), seen by Unknown Doctor																																																								
✓ COMPLETE																																																								
Encounter Billing																																																								
<input type="button" value="Edit"/> <input type="button" value="Print"/> <input type="button" value="More"/> <input type="button" value="Make Ready"/>																																																								
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3. Click **Search** to locate the Diagnosis code

Encounter #KSG2A2 Sep 9 (Patient 29 y.o.), seen by Unknown Doctor																															
✓ COMPLETE																															
Encounter Billing																															
<input type="button" value="Save"/> <input type="button" value="Save & Close"/> <input type="button" value="More"/> <input type="button" value="Save & Make Ready"/> <input type="button" value="COMPLETE"/>																															
Patient Encounters <ul style="list-style-type: none"> Nov 10 Sep 29 Sep 9 N/A 																															
<table border="0"> <tr> <td>Group Number:</td> <td>GNN000003</td> </tr> <tr> <td>Authorization #:</td> <td><input type="text"/></td> </tr> <tr> <td colspan="2"><input type="button" value="Auth. Num."/></td> </tr> <tr> <td colspan="13">Free text authorizations will be automatically added to the patient record as an unlimited authorization.</td> </tr> </table>													Group Number:	GNN000003	Authorization #:	<input type="text"/>	<input type="button" value="Auth. Num."/>		Free text authorizations will be automatically added to the patient record as an unlimited authorization.												
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4. Type in the diagnosis code, click the checkbox and click Save

Home | Scheduler | Patients | **Encounters** | Payments | Pre-Certs | Documents | Reports | Settings | Support

Azalea PM Search Encounters... Search New Encounter SOLOUNGE BOWEN

Encounters List Mellinda Test Mellinda Test Mellinda Test

Encounter #KSG2A2 Sep 9 (Patient 29 y.o.) , seen by Unknown Doctor ✓ COMPLETE

Encounter Billing C Save Save & Close More Save & Make Ready COMPLETE

Patient Encounters Nov 10
Sep 29 **Sep 9** N/A

Diagnosis Codes

Apply new diagnoses to all CPT Codes Below

Save Cancel Selected ICD10 Code to Add

Hide Filters ICD9 to ICD10 Search:

Type to search ICD10 codes...

	Code	Description	Frequency	Relevance	Details
<input type="checkbox"/>	Z00.00	Encntr for general adult medical exam w/o abnormal findings	3.85%		
<input type="checkbox"/>	I10	Essential (primary) hypertension	3.85%		
<input checked="" type="checkbox"/>	Z31.9	Encounter for procreative management, unspecified	-1.92%		
<input type="checkbox"/>	A00.0	Cholera due to Vibrio cholerae 01, biovar cholerae	0.00%		
<input type="checkbox"/>	A00.1	Cholera due to Vibrio cholerae 01, biovar eltor	0.00%		
<input type="checkbox"/>	A00.9	Cholera, unspecified	0.00%		
<input type="checkbox"/>	A01.00	Tuberculosis, unspecified	0.00%		

Home | Scheduler | Patients | **Encounters** | Payments | Pre-Certs | Documents | Reports | Settings | Support

Azalea PM Search Encounters... Search New Encounter SOLOUNGE BOWEN

Encounters List Mellinda Test Mellinda Test Mellinda Test

Encounter #KSG2A2 Sep 9 (Patient 29 y.o.) , seen by Unknown Doctor ✓ COMPLETE

Encounter Billing C Save Save & Close More **Save & Make Ready** COMPLETE

Patient Encounters Nov 10
Sep 29 **Sep 9** N/A

Diagnosis Codes

Apply new diagnoses to all CPT Codes Below

C.S.	Code	Description	Actions
ICD10	#1 - Z31.49	Encounter for other procreative investigation and testing	Apply to CPTs <input type="button" value="X"/>
ICD10	#2 - I10	Essential (primary) hypertension	Apply to CPTs <input type="button" value="X"/>
ICD10	#3 - Z31.9	Encounter for procreative management, unspecified	Apply to CPTs <input type="button" value="X"/>

CPT Codes/Charges

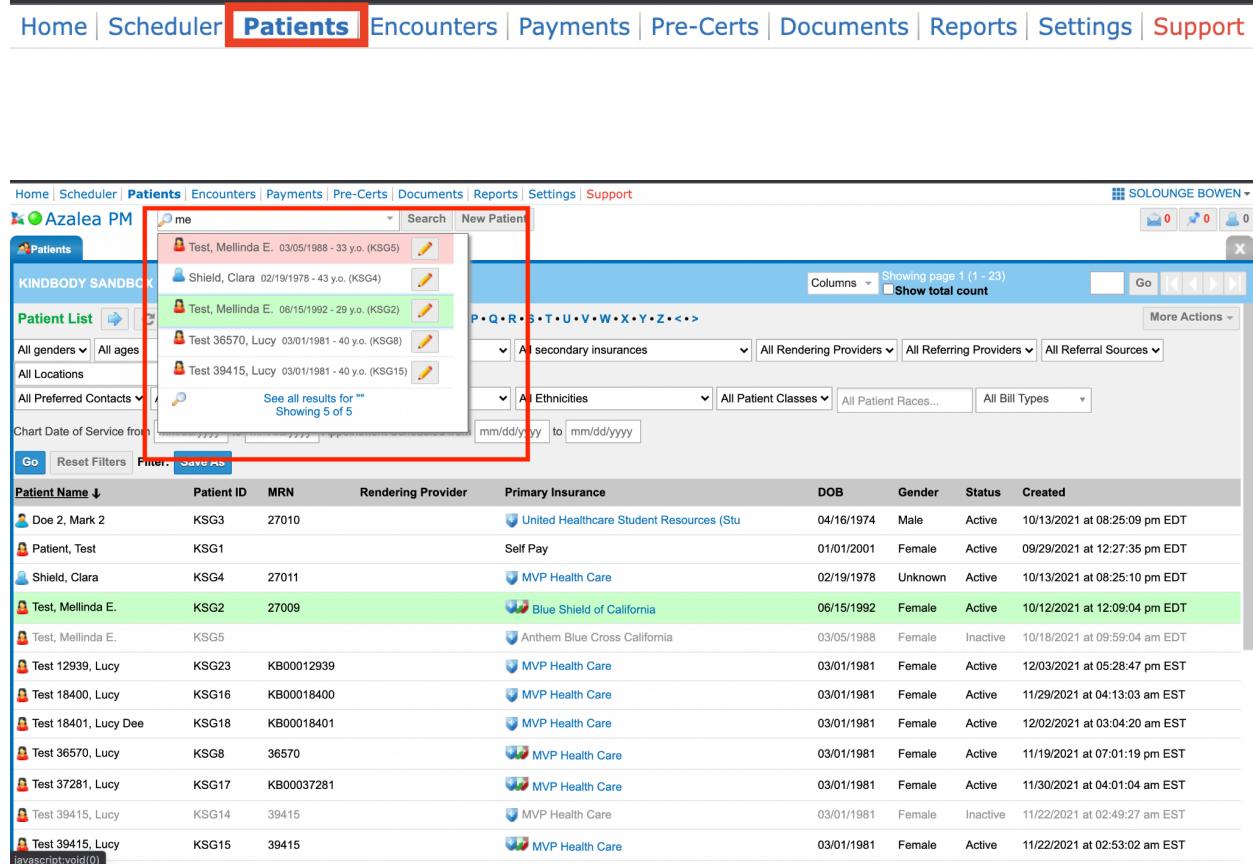
Claim Order	Code	Global Days	Description	DOS ↑	POS	Mods	Units	Type	Dx Pointers	ABN	RVU	Actions
#1	99070		SPECIAL SUPPLIES PHYS/QHP	Sep 9	HOME (12)	1	UN	Z31.49, I10, Z31.9				<input type="button" value="P"/> <input type="button" value="X"/>
#2	99213		OFFICE O/P EST LOW 20-29 MIN	Sep 9	HOME (12)	1	UN	Z31.49, I10, Z31.9				<input type="button" value="P"/> <input type="button" value="X"/>

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How to add Specialist & PCP Co-Pay to a Patient's Profile

1. Click Patients on the main menu tool bar and search for the desired patient and double click to open their profile



The screenshot shows the 'Patients' section of a software interface. A red box highlights the search results for 'Test, Mellinda E.' in the center of the page. The search bar at the top contains the query 'Test, Mellinda E.'. Below the search bar, there are various filters and search parameters. The main area displays a table of patient records with columns for Patient Name, Patient ID, MRN, Rendering Provider, Primary Insurance, DOB, Gender, Status, and Created. The row for 'Test, Mellinda E.' is highlighted with a green background.

Patient Name	Patient ID	MRN	Rendering Provider	Primary Insurance	DOB	Gender	Status	Created
Doe 2, Mark 2	KSG3	27010		United Healthcare Student Resources (Stu)	04/16/1974	Male	Active	10/13/2021 at 08:25:09 pm EDT
Patient, Test	KSG1			Self Pay	01/01/2001	Female	Active	09/29/2021 at 12:27:35 pm EDT
Shield, Clara	KSG4	27011		MVP Health Care	02/19/1978	Unknown	Active	10/13/2021 at 08:25:10 pm EDT
Test, Mellinda E.	KSG2	27009		Blue Shield of California	06/15/1992	Female	Active	10/12/2021 at 12:09:04 pm EDT
Test, Mellinda E.	KSG5			Anthem Blue Cross California	03/05/1988	Female	Inactive	10/18/2021 at 09:59:04 am EDT
Test 12939, Lucy	KSG23	KB00012939		MVP Health Care	03/01/1981	Female	Active	12/03/2021 at 05:28:47 pm EST
Test 18400, Lucy	KSG16	KB00018400		MVP Health Care	03/01/1981	Female	Active	11/29/2021 at 04:13:03 am EST
Test 18401, Lucy Dee	KSG18	KB00018401		MVP Health Care	03/01/1981	Female	Active	12/02/2021 at 03:04:20 am EST
Test 36570, Lucy	KSG8	36570		MVP Health Care	03/01/1981	Female	Active	11/19/2021 at 07:01:19 pm EST
Test 37281, Lucy	KSG17	KB00037281		MVP Health Care	03/01/1981	Female	Active	11/30/2021 at 04:01:04 am EST
Test 39415, Lucy	KSG14	39415		MVP Health Care	03/01/1981	Female	Inactive	11/22/2021 at 02:49:27 am EST
Test 39415, Lucy	KSG15	39415		MVP Health Care	03/01/1981	Female	Active	11/22/2021 at 02:53:02 am EST

2. Click the Insurance tab and click the Pencil icon to open the Insurance profile

Mellinda E. Test , DOB:06/15/1992, 29 y.o., Female KSG2

Patient Record

Insurances C Add Insurance Add Linked Insurance Filter by status... Filter by type.. Enabled

Insurance Name	Insurance Mnemonic	Policy Number	Group Number	Start Date	End Date	Type	Last Verified	Default	Actions
Blue Shield of California		BLUESHIELD0000001	GN000001			Primary	NOT YET VERIFIED	<input checked="" type="checkbox"/>	
AmeriBen		AMERIBEN0000001	GN000002			Secondary	NOT YET VERIFIED	<input checked="" type="checkbox"/>	
AmeriBen		AMERIBEN0000002	GN000003			Tertiary	NOT YET VERIFIED	<input checked="" type="checkbox"/>	

Showing page 1 of 1 (1 - 3 of 3)
Show total count

25 per page Columns Go ▶◀▶▶

- Fill in the required information and use notes for any important information. Click Submit

Payments | Pre-Certs | Documents | Reports | Settings | Support

Insurance Edit

Copay:

Effective Dates: -

Patient's Relationship to Insured: SELF

Insured Name: TEST, MELLINDA

Insured Date of Birth: 06/15/1992

Insured Social Security #: - -

Insured Sex: FEMALE MALE UNKNOWN

Employer Name:

Employer Address:

Address 1:

City: , Sta:

Zip: +4:

UNITED STATES OF AMERICA

Validate:

Insurance Type: Primary Secondary Tertiary

Default Insurance:

Vaccines Covered:

MC Secondary Reason Code:

Property and Casualty Claim:

Number:

Notes:

Patient Billing Information

Viewing Patient's Balance

1. Click Patients on the main menu tool bar and search for the desired patient and double click to open their profile

The screenshot shows the 'Patients' search interface. At the top, there's a search bar with 'me' and a dropdown menu. Below it is a list of patients with icons and edit/pencil buttons. A red box highlights the search bar and the filter section at the bottom.

Patient Name	Patient ID	MRN	Rendering Provider	Primary Insurance	DOB	Gender	Status	Created
Doe 2, Mark 2	KSG3	27010		United Healthcare Student Resources (Stu)	04/16/1974	Male	Active	10/13/2021 at 08:25:09 pm EDT
Patient, Test	KSG1		Self Pay		01/01/2001	Female	Active	09/29/2021 at 12:27:35 pm EDT
Shield, Clara	KSG4	27011	MVP Health Care		02/19/1978	Unknown	Active	10/13/2021 at 08:25:10 pm EDT
Test, Mellinda E.	KSG2	27009	Blue Shield of California		06/15/1992	Female	Active	10/12/2021 at 12:09:04 pm EDT
Test, Mellinda E.	KSG5		Anthem Blue Cross California		03/05/1988	Female	Inactive	10/18/2021 at 09:59:04 am EDT
Test 12939, Lucy	KSG23	KB00012939	MVP Health Care		03/01/1981	Female	Active	12/03/2021 at 05:28:47 pm EST
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Test 36570, Lucy	KSG8	36570	MVP Health Care		03/01/1981	Female	Active	11/19/2021 at 07:01:19 pm EST
Test 37281, Lucy	KSG17	KB00037281	MVP Health Care		03/01/1981	Female	Active	11/30/2021 at 04:01:04 am EST
Test 39415, Lucy	KSG14	39415	MVP Health Care		03/01/1981	Female	Inactive	11/22/2021 at 02:49:27 am EST
Test 39415, Lucy	KSG15	39415	MVP Health Care		03/01/1981	Female	Active	11/22/2021 at 02:53:02 am EST

2. If a patient has an outstanding balance it should appear in the patient's dashboard

The screenshot shows a patient profile for 'Mellinda E. Test'. The dashboard section is highlighted with a red box. It displays three notifications: 'Patient has a credit of \$1,920.00.', 'Patient has unapplied payments totaling: \$30,000.00.', and 'Patient has an insurance balance of \$10.00.' Below this is a 'Patient Summary' section with various demographic and contact information. At the bottom is an 'Account Summary' section showing payment history and account details.

How to pull a Patient statement

1. Click Patients on the main menu toolbar and search for the desired patient and double click to open their profile

The screenshot shows the Azalea PM software interface. At the top, there is a navigation bar with links: Home, Scheduler, Patients, Encounters, Payments, Pre-Certs, Documents, Reports, Settings, and Support. On the right side of the header, it says "SOLOUNGE BOWEN" with icons for notifications (0), messages (0), and users (0).

The main area is titled "Azalea PM" and "KINDBODY SANDBOX". It features a "Patient List" button. Below the button are dropdown filters for "All genders", "All ages", "All Locations", and "All Preferred Contacts". A search bar with placeholder text "See all results for "" Showing 5 of 5" is also present.

The main content area displays a table of patient records:

Patient Name	Patient ID	MRN	Rendering Provider	Primary Insurance	DOB	Gender	Status	Created
Doe 2, Mark 2	KSG3	27010		United Healthcare Student Resources (Stu)	04/16/1974	Male	Active	10/13/2021 at 08:25:09 pm EDT
Patient, Test	KSG1			Self Pay	01/01/2001	Female	Active	09/29/2021 at 12:27:35 pm EDT
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Test 36570, Lucy	KSG8	36570		MVP Health Care	03/01/1981	Female	Active	11/19/2021 at 07:01:19 pm EST
Test 37281, Lucy	KSG17	KB00037281		MVP Health Care	03/01/1981	Female	Active	11/30/2021 at 04:01:04 am EST
Test 39415, Lucy	KSG14	39415		MVP Health Care	03/01/1981	Female	Inactive	11/22/2021 at 02:49:27 am EST
Test 39415, Lucy	KSG15	39415		MVP Health Care	03/01/1981	Female	Active	11/22/2021 at 02:53:02 am EST

- Click Patients Actions and choose the Remainder PDF to open the statement

Mellinda E. Test , DOB:06/15/1992, 29 y.o., Female KSG2

Patient Record

- Details
- Dashboard
- Demographics
- Next of Kin
- Insurance
- Appointments
- Recalls
- Comments
- Tasks
- Messages
- Patient Portal
- Update Requests

- Documents
- Documents
- Assembly
- Handouts

- Billing
- Encounters
- Configured Encounters
- Account Summary
- \$ Billing History
- Authorizations
- Pre-Certs

Patient Summary

Patient Name: Test, Mellinda E.
Patient ID: KSG2
Medical Record Number: 27009
Rendering Provider:
Bill Type: INSURANCE
Date of Birth: 06/15/1992
Gender: Female
Email: sbowen@kindbody.com
Address: 123 PARK AVE. NO APT. NEW YORK, NY 10557
Primary Phone: (616) 555-5555
Preferred Contact Method: No Preference
Created By: Kindbody INTERFACE on 10/12/2021 at 12:09:04 pm
Last Edited By: MICHELLE PROCTOR on 12/03/2021 at 10:36:56 am EST

Account Summary

Account Information	
Min. Amount Due:	Pri. Ins. Co-Pay:
Last Payment Date:	Sec. Ins. Co-Pay:
Last Ins. Payment Date:	Ter. Ins. Co-Pay:
Last Pat. Stmt. Generated:	

Patient Actions

- New Encounter (Billing Only)
- Enter Payment...
- Order New Pre-Cert...
- Schedule Appointment...
- Prescription...
- Print Address Label
- Print X-Ray Label
- Print Generic Label
- Print Chart Label
- Print All Labels
- Normal
- Remainder

Billing

Scheduling / Visits

Medical

Health Information Exchange

Deactivate Patient

Merge Into Patient

Disable Batch Patient Statements

Labels

Images

Print

Upload

Print Demographics

Print Facesheet

Print Forms

Print Handouts

Patient Statements

Prescription...

Print Photo

Scan Photo

Take Photo

Document Viewer

Azalea Health Innovations

PATIENT STATEMENT

KINDBODY SANDBOX 3005 PEACHTREE RD NE ATLANTA, GA 30305-2214 Billing #: (855)-563-2639 Office #: (855)-563-2639	Stmt. Date 12/05/2021 Due Date 12/25/2021	Acct # KSG2 Min. Amt. Due \$	Amt. Due \$(1,920.00) Amt. Paid
---	--	---------------------------------------	---------------------------------------

RETURN SERVICE REQUESTED
 Please check the box if your address is incorrect or if insurance information has changed, please indicate changes on the reverse side of this form.

Addressee
TEST, MELLINDA
123 PARK AVE. NO APT.
NEW YORK, NY 10557

Remit To
KINDBODY SANDBOX
3005 PEACHTREE RD NE
ATLANTA, GA 30305

STMT DATE	ACCOUNT #	INSURANCE PENDING	CURRENT	31-60 DAYS	61-90 DAYS	91-120 DAYS	120+ DAYS
12/05/2021	KSG2	\$10.00	\$(1,920.00)	\$0.00	\$0.00	\$0.00	\$0.00

MAKE CHECKS PAYABLE TO	BILLING QUESTIONS	AMOUNT DUE:	\$(\$1,920.00)
KINDBODY SANDBOX (855)-563-2639		MIN. AMOUNT DUE: DUE DATE:	\$12/25/2021

DATE OF LAST PAYMENT:	LAST PAYMENT AMOUNT:	PATIENT:	PRI. CHARGE	SEC. CHARGE	GUAR.	DISC	REMAINDER
11/10/2021	Jessica Auffant	DEPOSIT	\$0.00			\$ (2,000.00)	\$ (2,000.00)
09/29/2021	Unknown Doctor	SURGICAL SUPPLIES	\$100.00			\$ (20.00)	\$80.00
09/09/2021	Unknown Doctor	SPECIAL SUPPLIES PHYS/QHP	\$100.00	\$(80.00)		\$ (10.00)	PENDING
09/09/2021	Unknown Doctor	OFFICE O/P EST LOW 20- 29 MIN	\$0.00				

Download **Print** **New Window** **Send to Patient Documents**

How to pull a Patient EOB

1. Click Payments on the main menu tool bar and click the Eye icon to view the payment

The screenshot shows the 'Payments' list interface. A single payment record is displayed for a patient named 'BLACK FRIDAY DISCOUNT' on 11/24/2021 at 01:24:22 pm EST. The payment amount is \$0.00 and it is marked as 'Posted'. The 'Actions' column contains several icons, with the eye icon being highlighted with a red box. The top navigation bar includes links for Home, Scheduler, Patients, Encounters, Payments (highlighted), Pre-Certs, Documents, Reports, Settings, and Support.

2. Click Print EOB

The screenshot shows the 'Payment Details' screen for the same payment record. The 'Print EOB' button is highlighted with a red box. The page displays various details about the payment, including the patient name, date, and amount, along with payment codes and notes. Below this, there are sections for 'Encounters' and 'Payment Totals', both of which are currently empty. The top navigation bar includes links for Home, Scheduler, Patients, Encounters, Payments (highlighted), Pre-Certs, Documents, Reports, Settings, and Support.

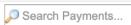
How to Post a Payments for Insurance/Patients

1. Click Payments on the main menu tool bar and click the New Payment button

The screenshot shows the 'Payments' screen with the 'New Payment' button highlighted with a red box. The top navigation bar includes links for Home, Scheduler, Patients, Encounters, Payments (highlighted), Pre-Certs, Documents, Reports, Settings, and Support.

Home | Scheduler | Patients | Encounters | **Payments** | Pre-Certs | Documents | Reports | Settings | Support

SOLOUNGE BOWEN ▾

Azalea PM  Search **New Payment**   

Payments List Unapplied Payments List EDI Remits / Logs Denials

Payments

Columns ▾ Showing page 1 (1 - 1) Show total count Go ▶◀▶▶

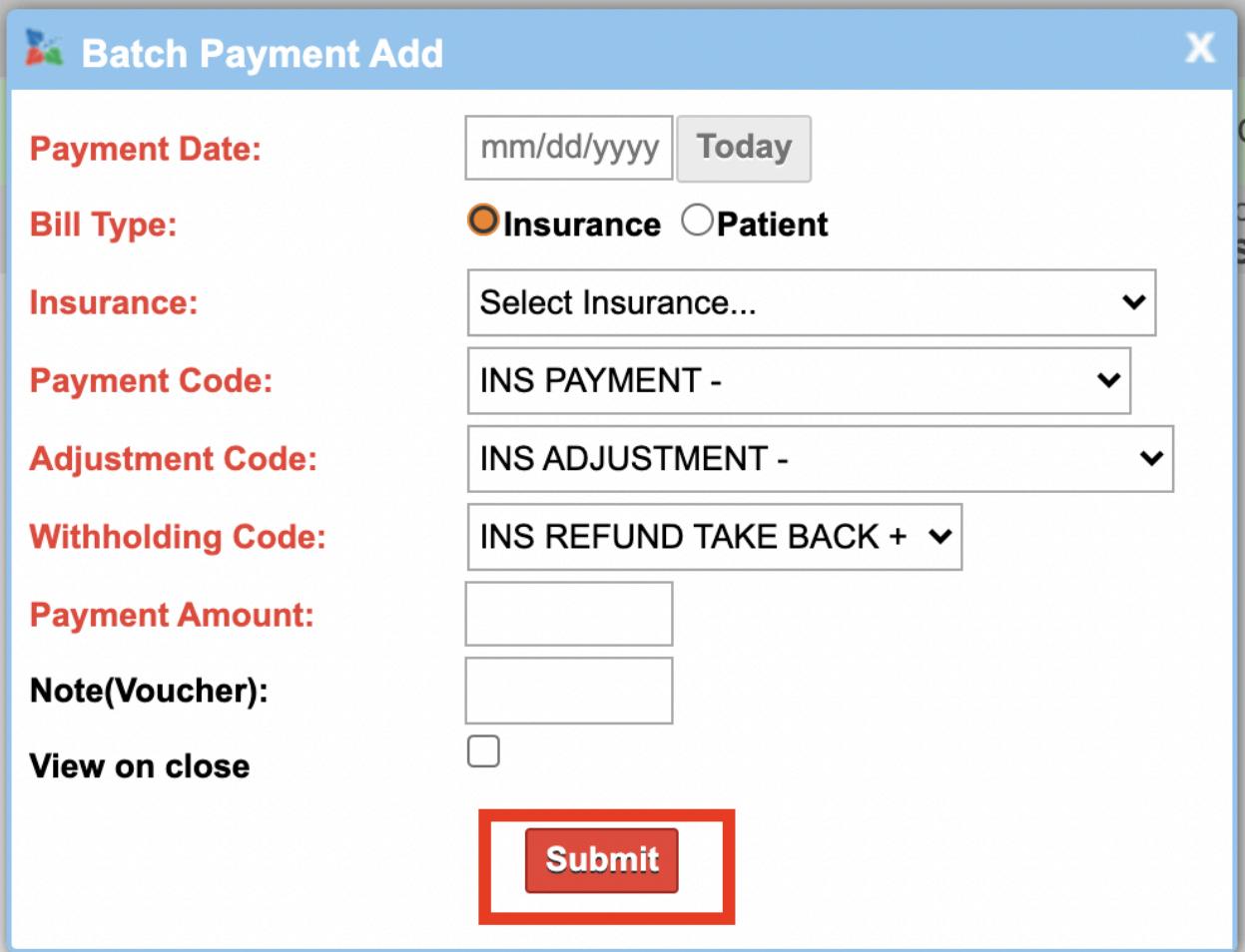
Upload EDI File  Payment Date mm/dd/yyyy mm/dd/yyyy Filter by insurance All Payments and Alerts Claim Payment Status Filter by status Validate Alerts

Search...

Batch#	Payment Date	Created	Bill Type	Auto-Posted	Insurance	Payment Amount	Note(Voucher)	Status	Actions
1	11/24/2021	11/24/2021 at 01:24:22 pm EST	Patient	-		\$0.00	BLACK FRIDAY DISCOUNT	Posted	    

25 per page Columns ▾ Showing page 1 (1 - 1) Show total count Go ▶◀▶▶

2. Fill in all the required information within the window and click Submit

A screenshot of a software window titled "Batch Payment Add". The window contains several input fields and dropdown menus. At the top left is a logo consisting of four colored squares (red, green, blue, yellow) followed by the text "Batch Payment Add". On the right side is a close button (an "X").
Payment Date: A text input field containing "mm/dd/yyyy" with a "Today" button to its right.
Bill Type: A radio button group with two options: "Insurance" (selected) and "Patient".
Insurance: A dropdown menu labeled "Select Insurance..." with a downward arrow.
Payment Code: A dropdown menu labeled "INS PAYMENT -" with a downward arrow.
Adjustment Code: A dropdown menu labeled "INS ADJUSTMENT -" with a downward arrow.
Withholding Code: A dropdown menu labeled "INS REFUND TAKE BACK +" with a downward arrow.
Payment Amount: An empty text input field.
Note(Voucher): An empty text input field.
View on close: A checkbox.
Submit: A red rectangular button with a white border and the word "Submit" in white.

How to add an Encounter

1. Click Patients on the main menu tool bar and search for the desired patient and double click to open their profile

Home | Scheduler | Patients | Encounters | Payments | Pre-Certs | Documents | Reports | Settings | Support

Azalea PM

PATIENTS

KINDBODY SANDBOX

Patient List

All genders All ages All Locations All Preferred Contacts

See all results for "Showing 5 of 5"

Columns Show total count Go More Actions

mm/dd/yyyy to mm/dd/yyyy

Patient Name	Patient ID	MRN	Rendering Provider	Primary Insurance	DOB	Gender	Status	Created
Doe 2, Mark 2	KSG3	27010	United Healthcare Student Resources (Stu)	04/16/1974	Male	Active	10/13/2021 at 08:25:09 pm EDT	
Patient, Test	KSG1		Self Pay	01/01/2001	Female	Active	09/29/2021 at 12:27:35 pm EDT	
Shield, Clara	KSG4	27011	MVP Health Care	02/19/1978	Unknown	Active	10/13/2021 at 08:25:10 pm EDT	
Test, Mellinda E.	KSG2	27009	Blue Shield of California	06/15/1992	Female	Active	10/12/2021 at 12:09:04 pm EDT	
Test, Mellinda E.	KSG5		Anthem Blue Cross California	03/05/1988	Female	Inactive	10/18/2021 at 09:59:04 am EDT	
Test 12939, Lucy	KSG23	KB00012939	MVP Health Care	03/01/1981	Female	Active	12/03/2021 at 05:28:47 pm EST	
Test 18400, Lucy	KSG16	KB00018400	MVP Health Care	03/01/1981	Female	Active	11/29/2021 at 04:13:03 am EST	
Test 18401, Lucy Dee	KSG18	KB00018401	MVP Health Care	03/01/1981	Female	Active	12/02/2021 at 03:04:20 am EST	
Test 36570, Lucy	KSG8	36570	MVP Health Care	03/01/1981	Female	Active	11/19/2021 at 07:01:19 pm EST	
Test 37281, Lucy	KSG17	KB00037281	MVP Health Care	03/01/1981	Female	Active	11/30/2021 at 04:01:04 am EST	
Test 39415, Lucy	KSG14	39415	MVP Health Care	03/01/1981	Female	Inactive	11/22/2021 at 02:49:27 am EST	
Test 39415, Lucy	KSG15	39415	MVP Health Care	03/01/1981	Female	Active	11/22/2021 at 02:53:02 am EST	

2. Click the Patient Actions tab and click the New Encounter button

1992, 29 y.o., Female KSG2

Patient Summary

Patient Name: Test, Mellinda E.
Patient ID: KSG2
Medical Record Number: 27009
Rendering Provider:
Bill Type: INSURANCE
Date of Birth: 06/15/1992
Gender: Female
Email: sbowen@kindbody.com
Address: 123 PARK AVE. NO APT.
NEW YORK, NY 10557
Primary Phone: (616) 555-5555
Preferred Contact Method: No Preference
Created By: Kindbody INTERFACE on 10/12/2021 at 12:09:04 pm
Last Edited By: MICHELLE PROCTOR on 12/03/2021 at 10:36:56 am EST

Account Summary

Account Information

Min. Amount Due: Last Payment Date: 12/06/2021 Last Ins. Payment Date: 11/03/2021 Last Pat. Stmt. Generated:

Pri. Ins. Co-Pay: Sec. Ins. Co-Pay: Ter. Ins. Co-Pay:

Patient Actions

- New Encounter (Billing Only) **(Red Box)**
- Print Demographics
- Print Facesheet
- Print Forms
- Print Handouts
- Print Statements
- Schedule Appointment...
- Prescription...
- Secure message request
- Deactivate Patient
- Merge Into Patient
- Disable Batch Patient Statements
- Print Address Label
- Print X-Ray Label
- Print Generic Label
- Print Chart Label
- Print All Labels
- Scan Photo
- Take Photo

3. Fill in all of the required information within the window and update the status of the encounter and click Save

Encounter #KSG2A9 N/A (Patient 29 y.o.)

Save **Save & Close** **More** **Save & Make Ready**

Patient Encounters

Nov 10	BILLED
Sep 29	CANCELLED
Sep 9	INCOMPLETE
N/A	HOLD
N/A	INCOMPLETE
N/A	INS. CREDIT
N/A	NEW
N/A	PATIENT CREDIT
N/A	READY

ENCOUNTER OVERVIEW

Patient Details

Patient ID: KSG2
Name: MELLINDA E. TEST
DOB, Age, Gender: 06/15/1992, 29 y.o., FEMALE
MRN: 27009
Bill Type: INSURANCE **Insurance Info**

Patient Address: 123 PARK AVE. NO APT.
NEW YORK, NY 10557
UNITED STATES OF AMERICA
Primary Phone: (616) 555-5555
Email: sbowen@kindbody.com

Encounter Details

Encounter Number: KSG2A9
Visit Number External:
Appointment Type:
Appointment Reason:
Date of Service: 12/06/2021 **Today** **Referrals**
Rendering Provider: Unknown Doctor
Billing Provider: KINDBODY SANDBOX
Referring Provider: Select Referring Provider... **+ Referring**

Primary Insurance

Insurance Name: Blue Shield of California (Policy #BLUESHIELD0000001)
Insurance Address: P.O. Box 272540, Chico, CA 95027
Professional (1500) Payer ID:
Institutional (UB) Payer ID:
Policy Number: BLUESHIELD0000001
Group Number: GN0000001
Vaccines Covered: No
Medicaid Referral #:
Authorization #: **+ Auth. Num.**

Free text authorizations will be automatically added to the patient record as an unlimited authorization.

Referral Start Date: mm/dd/yyyy **Calendar**
Referral End Date: mm/dd/yyyy **Calendar**
Number of Visits:
Third Party Liability Code:
Third Party Liability Status: Select Third Party Liability Status... **▼**

How to view Patient's Prior Authorizations

1. Click Patients on the main menu tool bar and search for the desired patient and double click to open their profile

Home | Scheduler | **Patients** | Encounters | Payments | Pre-Certs | Documents | Reports | Settings | Support

2. Click the Authorizations tab to view the patient's prior Authorizations

Mellinda E. Test , DOB:06/15/1992, 29 y.o., Female KSG2 

Patient Record

Patient Authorizations **C** **+ New Authorization**

Search by Patient / Authorization #...

Patient ID	Authorization Number	Note	Insurance	Type	CPT	Num Visits/Units	Remaining	Status	Begin Date	End Date	Actions
No items to display											

25 per page Columns **▼** Showing page 1 (no results) Show total count **Go** **◀** **▶** **▶▶**

- ▼ Details
 - Dashboard
 - Demographics
 - Next of Kin
 - Insurance
 - Appointments
 - Recalls
 - Comments
 - Tasks
 - Messages
 - Patient Portal
 - Update Requests
- ▼ Documents
 - Documents
 - Assembly
 - Handouts
- ▼ Billing
 - Encounters
 - Configured Encounters
 - Account Summary
 - Billing History
 - Authorizations** **✓** **Selected**
 - Pre-Certs

Refunding from a batch payment

1. Identify the patient has a credit balance. This usually happens when more than enough money is collected from the patient.
2. Click **Payments** in the top menu
3. While on the **Payments List** tab, click **New Payment**
4. Enter a payment date. This will be your refund date.
5. Select Patient as your bill type
6. Select any payment code. It doesn't matter which code because you won't be using it.
7. The adjustment code defaults to PAT DISCOUNT. You can change this if you want but it doesn't matter which doe because you won't be using it.
8. Select your refund code in the withholding code dropdown. This is the code you will use.
9. Enter 0.00 in the payment amount field. You aren't receiving payments so this should be 0.00.
10. Enter check # or other reference # in the Note(Voucher) field
11. Select "View on close" so that you can start posting after adding this payment
12. Click **Submit**
13. Click the **Override Formula** checkbox. This disables the formula that calculates the amounts that show up after you enter an allowed amount.
14. Find the CPT with the credit balance. Type the amount of the patient credit refund into the Withhold field of the payment.
15. Click **Submit Encounter Payments**

How to find No Show Patients

1. Search for patient
2. Choose encounter and search for the desired date
3. Scroll to the Charges & Payment section and it should show the No Show Fee (Use Lucy Test 10036)

How to Switch between Client and Production Mode

1. Click the Home icon
2. On the far right of your screen should show a drop down box that let you choose your desired mode.

Insurance Encounter RCM Encounter Status Flow

Encounter Status	Description
EMR Incomplete	Default status of an Azalea encounter when it comes from Kindbody EMR
New	The status a KB RCM staff makes an encounter after verified all information is correct; handoff to Azalea RCM
Incomplete	The status a AZ RCM staff makes an encounter when a required piece of information is missing on a 1500 claim form (ex., missing pt demographics, CPT/ICD10 codes).
Ready	The status a AZ RCM staff makes an encounter after preparing the encounter for claims submission; handoff to Azalea Claims team
Billed	The status a AZ RCM staff makes an encounter after submitting the claim to insurance and/or patient responsibility. The encounter will remain in this status until payment is 100% received by insurance and/or patient.
Complete	The status a AZ RCM staff makes an encounter when it has been 100% paid.

System References

Home

1. **Office Overview**
 - a. Create filter for specific location to see daily upcoming, completed, missing
2. **Pre-Cert Counts**
 - a. Summary view of all Pre-Certs by status
3. **RCM Dashboard**

- a. Summary stats for General, Aging, Practice Analysis, Billing Charges, Billing Payments

Scheduler

1. Scheduler

- a. Customize your view by selecting the date, location and providers (either by show scheduled or by individual selection)

2. Recall

- a. Description TBD

3. Appointments

- a. List of all appointments; use filter for specific search

Patients

- 1. View the list of patients and search by patient name, MRN, insurance type, bill type (insurance or self-pay), patient class (employer)

2. Bill Type

- a. Self Pay = Patient with either no active insurance or Out of Network insurance
- b. Insurance = Patients with Kindbody In Network Insurance

3. Patient Class

- a. Used to indicate employer membership if applicable

Encounters

- 1. Use the search box or the filters available

Payments

1. Payments List

- a. Description TBD

2. Unapplied Payments List

- a. All Calendar payments will be seen here. Search by MRN, patient name, keywords to find payments

3. EDI Remits/Logs

- a. Description TBD

4. Denials

- a. Description TBD

Pre-Certs

- 1. List of all Pre-Certs

Documents

- 1. Inventory of all Kindbody financial documents

Reports

1. Reports List - Standard AzaleaHealth report list

- a. Reports List
- b. Report Groups
- c. Configured Reports

2. Reports Queue

3. Patient Statements

4. System Statistics

5. HIPAA Log

6. PM Records

Settings

1. Users

- a. View users and whoever signs in

2. Roles

- a. View/edit roles

3. Locations

- a. View/edit locations

4. Providers

- a. View/edit rendering and referring providers

5. Groups

- a. Can be used from the messaging system and the task system. Tasks can be sent to a group of users instead of individuals

6. Insurances

- a. View all insurances

7. Handouts

- a. View/edit/download patient handouts

8. Document Folders

- a. Can be used for organization of documents

9. Task Categories

- a. When you're creating task, you can filter the task into categories so that it can have related topics

10. DX QuickPicks

- a. This is where you can manually create encounters and group together different code that may be relevant to package type

11. CPT QuickPicks

- a. This is where you can manually create encounters and group together different code that may be relevant to package type

12. Encounter Classes

- a. Can be used for organization and categorization of your encounters
- b. Encounter classes are used by Azalea RCM team and Kindbody RCM team for managing encounters

13. Client Configuration

- a. Where you can edit the patient statements cutoff amount and you can indicate any patient that owes less than your desired amount

14. Branding Files

- a. If you want any image on handouts or documents, you'd have to upload it within the Brandily files tab first

15. Handout Categories

- a. Another way to organize and manage your handout files

16. Code Sets