Hi!

We hope you are active, sharp and ready to go through following document.

If you don’t feel light enough, go grab a cup of tea or help yourself with some candies – just ask for candies from any one of us.

The following document is designed to help you understand the purpose of the software and how it is used ideally within a clinic.

You will need to execute following test cases keeping in mind that the software is used by variety of users.

The user may have a different role (e.g. Doctor, Office Manager, Receptionist, etc.) hence their workflows in the software will be unique.

The document will help you setup a new Practice (known as clinic), make Provider profile (known as doctor) and create different user accounts.

You will use each user account and run their flows to understand how they are supposed to work in the clinic by using CureMD.

We hope you find no difficulty going through the document, we hope you will be able to answer questions asked at the end.

Good luck!!

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| **We are going to setup a profile of the Practice in CureMD**   * You will use a Super/Support login to create the profile * You will enter details of the Practice and specify in what locations it operates | | | |
| **Step #** | **Action to Perform** | **Keywords** | **Notes/Def**i**nitions** |
| 1 | Open CureMD login page and use Support user credentials |  | ‘*Practice*’ stands for clinic or doctor’s office in USA |
| 2 | In the new window click on ‘Settings’ at top right corner of the screen |  |  |
| 3 | Navigate to Practice > My Practice using left tree menu |  |  |
| 4 | Update and Save following:   * Address * Contact Details * Tax ID (EIN) | Tax ID | A Taxpayer Identification Number (TIN) is used for tax purposes in the United States. (e.g )  A TIN may be assigned by the Social Security Administration or by the Internal Revenue Service (IRS). |
| 5 | Navigate to Practice > My Practice > Locations |  |  |
| 6 | Add and save two Locations by entering following details:   * Address * Contact Details * Place of Service | Place of Service | A Place of Service (or POS code) describes what type of location the patient is visiting to get medical services.  <http://www.dmerc.com/manual/poscode.htm> |
| **We are now going to create a profile of the Provider and setup Provider’s Calendar**   * You will use a Super/Support login to create the profile | | | |
| **Step #** | **Action to Perform** | **Keywords** | **Notes/Def**i**nitions** |
| 1 | Navigate to Settings > Practice > Provider > Practice Provider |  | ‘Provider’ stands for physician or doctor in USA |
| 2 | Add and save Provider profile by entering following details:   * Name * SSN * NPI * License Type * Address * Contact Details * Specialty * Provider type (Billing, Rendering/Attending) | NPI  Billing Provider  Rendering Provider | <https://en.wikipedia.org/wiki/National_Provider_Identifier>  Search on internet what Billing Provider and Rendering Providers are. |
| 3 | Navigate to Settings > Practice > Provider > Provider Profile > Schedule | Schedule | Scheduler is a module/feature in CureMD which shows the schedule as Months, Days and Hours along with no. of patients the doctor is able to see per hour/slot |
| 4 | Add and save a new Calendar  Make sure to create a realistic schedule |  |  |
| 5 | Navigate to Settings > Practice > Provider > Provider Profile > Block Schedule |  | A block schedule is used to determine that during the day |
| 6 | Add and save Schedule Block as follow   * Name/Reason of the Block (Lunch) * What date range the block will be valid for * The time/slots the block must appear |  |  |
| **We are going to create a profile of the Resource and setup Resource’s Calendar**   * You will use a Super/Support login to create the profile | | | |
| **Step #** | **Action to Perform** | **Keywords** | **Notes/Def**i**nitions** |
| 1 | Navigate to Settings > Practice > Provider Groups >Resource |  | ‘Resource’ is a name used for any physical entity of the ‘Practice’ which is used by Practice staff while treating patients, e.g. X-Ray machine, Chemotherapy chair |
| 2 | Add and save Provider profile by entering following details:   * Name * Provider |  |  |
| 3 | Navigate to Settings > Practice > Resource > Schedule |  |  |
| 4 | Add and save a new Calendar  Make sure to create a realistic schedule |  |  |
| 5 | Navigate to Settings > Practice > Resource > Block Schedule |  | A block schedule is used to determine that during the day |
| 6 | Add and save Schedule Block as follow   * Name/Reason of the Block (Lunch) * What date range the block will be valid for * The time/slots the block must appear |  |  |

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| **Setup**   * A User Logs in using the Office Manager’s account to create his own account and then uses his own account to schedule a new patient. | |  | |  |
| **Step #** | **Action to Perform** | **Expected Outcome** | **Keywords** | **Notes/Definitions** |
| 1 | Log into CureMD Application. Take credentials (URL, Username and Password) from your TL/PM | Home screen will open up showing User’s Dashboard. |  |  |
| 2 | Go-to Settings module from top navigation | Screen will update to show the Settings. | Settings | ADDING A USER (RECEPTION) |
| 3 | From the left selection panel, Expand Practice. | Several options under ‘Practice’ will become visible |  |  |
| 4 | Click ‘Practice User’ option | Screen will show all the users with their details | Practice User |  |
| 5 | Click ‘Add User’ action button at the top | Several text fields are visible where User details can be entered. | Add User |  |
| 6 | Enter the following information in User’s Demographics:   1. Select Title as ‘Miss’ 2. Enter User’s First Name, Middle Initial and Last Name 3. Enter Date of Birth 4. Select Gender 5. Enter Address Line 1 6. Enter City, State and Zip 7. Enter User’s valid email address 8. Select multiple locations in Location drop down 9. Select ‘CureMD’ in Authentication 10. Enter User’s phone number 11. Enter new Username and Password 12. Enter Secret Question with Answer 13. Select User Role as ‘Reception’ 14. Don’t associate any Providers with the user 15. Don’t change the Active status of the user 16. Select ‘Use my Location as default for Patient registration’. |  |  |  |
| 7 | Click Save | A prompt message at the top shows that Transaction Successful: User Registered | Role |  |
| 8 | Click ‘Permissions’ tab on the top | Several checkboxes appear to allow permissions to the user. |  |  |
| 9 | Give following rights to User:   1. Personal 2. Patient 3. Add Patient 4. Billing 5. Demographics 6. Scheduling 7. Scheduler 8. Check In |  |  |  |
| 10 | Click Save and Log out | User profile is updated. Window is closed. | Log Out | LOGGING OUT |
| 11 | Log in as the new user you have just created. | Home screen will open up showing Patient’s Dashboard. | Log In | LOGGING IN AS THE NEW USER |
| **12a.** | **Go to Patients module at the Top.** | **Screen with Search bar appears with options at the top** |  | **ADDING A NEW PATIENT FROM PATIENT’S MODULE** |
| 13 | Click on ‘Add’ button at the top | Add Patient screen appears with several fields for entering patient details. |  |  |
| 14 | Enter the following information in Patient’s Demographics:   1. Select Title as ‘Miss’ 2. Enter User’s First Name, Middle Initial and Last Name 3. Enter Date of Birth 4. Select Gender 5. Enter Address Line 1 6. Enter the SSN as 123456789 7. Enter City, State and Zip 8. Enter Patient’s valid email address 9. Select location in Location drop down 10. Enter the Patient’s Contact number. |  |  |  |
| 15 | Enter the following Primary Insurance info   1. Mark the checkbox ‘Include Primary Insurance’ 2. Select the Plan name ‘Medicare’ from the drop down. 3. Select the Address from the drop down. 4. Enter the Policy Number as ‘123456789’ 5. Enter the Group Number ‘abc123’ 6. Enter the copay amount as $10 7. Select the Insured Party as ‘Self’ |  |  |  |
| 16 | Enter the following Secondary Insurance info   1. Mark the checkbox ‘Include Secondary Insurance’ 2. Select the Plan name ‘Aetna’ from the drop down. 3. Select the Address from the drop down. 4. Enter the Policy Number as ‘1234567A’ 5. Enter the Group Number ‘xyz123’ 6. Enter the copay amount as $10 7. Select the Insured Party as ‘Self’ |  |  |  |
| 17 | Click on Save & Schedule | The screen will be updated to show the scheduler. |  |  |
| 18 | From the left selection panel, select the Provider |  |  | SCHEDULING THE PATIENT |
| 19 | Select the date from the calendar | The scheduler will be refreshed to show the schedule for current date. |  |  |
| 20 | Click on the white space for the time you want to schedule the appointment (Today) | A window ‘Book Appointment For’ will show up on the right side of the screen. |  |  |
| 21 | Select the status as Scheduled |  |  |  |
| 22 | Select the reason as ‘Follow up’ for appointment |  |  |  |
| 23 | Click on ‘Schedule’ button | An appointment will show up on the scheduler for the current date. The ‘Book Appointment For’ window will be closed down. |  |  |
| 24 | Click on the scheduled appointment | List of options appear in drop down. |  |  |
| 25 | Select ‘check-in’ option | A check-in window appears on the right side of the screen. | Check In |  |
| 26 | The copay amount is $10. Mark it as paid. Save. | The check-in window is closed. The color of the appointment changes. | Copay |  |
| 27 | Click on scheduled (Checked in) appointment | List of options appear in drop down |  |  |
| 28 | Click on check out. Save. | The check-out window is closed. The color of the appointment changes on the scheduler | Check Out |  |
| **12b.** | **Go to Scheduler Module** | **The screen showing the ‘Scheduler’ appears** |  | **ADDING A NEW PATIENT FROM SCHEDULER MODULE** |
| 13 | From the left selection panel, select the Provider |  |  |  |
| 14 | Select the date |  |  |  |
| 15 | Click on the white space for the time you want to schedule the appointment (Today) | A window ‘Book Appointment For’ will show up on the right side of the screen. |  |  |
| 16 | On the Appointment window opened on the right, click on Quick Add | A pop up window appears showing fields for details of Demographics for the new patient. | Quick Add | ‘Quick Add’ is add a new patient quickly and schedule an appointment |
| 17 | Enter the following information in Patient’s Demographics:   1. Select Title as ‘Miss’ 2. Enter User’s First Name, Middle Initial and Last Name 3. Enter Date of Birth 4. Select Gender 5. Enter Address Line 1 6. Enter City, State and Zip 7. Enter Patient’s valid email address 8. Select location in Location drop down 9. Enter the Patient’s Contact number   Click Save. | The details are saved. |  |  |
| 18 | Click on ‘Insurance’.  Then, click on ‘Add’. | No Record Found will be shown on the window for the list of Insurances.  The window is updated to show the fields to enter Insurance information for the new Patient. |  |  |
| 19 | Enter the following insurance info   1. Select the Plan name from the drop down. 2. Select the Address from the drop down. 3. Enter the Policy Number 4. Enter the Group Number 5. Enter the copay amount as $20 6. Do not uncheck the ‘Active’ checkbox |  | Plan |  |
| 20 | Uncheck ‘Self’ box for Insured Party. | Further fields to enter Insured Party details appear | ‘Self’ Check box |  |
| 21 | Enter the following details for the Patient’s Spouse:   1. Select the Title as ‘Miss’ 2. Select the Relationship as ‘Spouse’ from the drop down 3. Enter First name, Middle Initial and Last name 4. Enter a 10 digit SSN 5. Enter a valid email ID 6. Enter Address Line 1 7. Enter City, State and Zip 8. Enter Phone number |  | Relationship |  |
| 22 | Click Save. Then, click Continue. | Insurance details will be saved. The window closes down showing the ‘Book Appointment For’ window on the right side of the screen. | Save Continue |  |
| 23 | Select the status as Scheduled |  | Status | SCHEDULING THE PATIENT |
| 24 | Select the reason as ‘Follow Up’ |  | Reason |  |
| 25 | Click on Schedule | An appointment will show up on the scheduler for the current date. The ‘Book Appointment For’ window will be closed down. |  |  |
| 26 | Click on the scheduled appointment for the same patient | List of options appear in drop down. |  |  |
| 27 | Select check-in | A check-in window appears on the right side of the screen. |  |  |
| 28 | The copay amount is $20. Mark it as paid. Save. | The check-in window is closed. The color of the appointment changes. |  |  |
| 29 | Click on scheduled (Checked in) appointment | List of options appear in drop down |  |  |
| 30 | Click on check out. Save. | The check-out window is closed. The color of the appointment changes on the scheduler |  |  |
| **Setup**   * Nurse practitioner is logged in the application to record the subjective and objective assessment of the patient. | | Make user for Nurse Practitioner using 1-10 steps | |  |
| **Step #** | **Action to Perform** | **Expected Outcome** | **Keywords** | **Notes/Definitions** |
| 1 | Give following rights to User from permission tab:   1. Personal 2. Patient 3. Add Patient 4. Billing 5. Demographics 6. Scheduling 7. Scheduler 8. Check In 9. Clinical |  |  |  |
| 2 | Give following rights to User from My Preferences:   1. Default landing page ‘Today’s Patient’ |  |  |  |
| 3 | Click Save and Log out | User profile is updated. Window is closed. | Log Out | LOGGING OUT |
| 4 | Log in as the nurse practitioner user you have just created. | Home screen will open up showing Today’s Patient screen. | Log In | LOGGING IN AS THE NEW USER |
| **5** | **Today’s Patient** | **Patient that are Checked-in/Checked-out will be showing on Today’s Patient** |  | **Recording subjective and objective assessment of patient** |
| 6 | Change the status from Check-in to Pre-exam |  |  |  |
| 7 | Navigate to Patient>Clinical |  |  |  |
| 8 | Add ‘Allergies’ | Allergy component will open | Allergy |  |
| 9 | Go to Add Allergen | Add allergy screen with search panel to search allergies will open |  |  |
| 10 | Select required allergy |  |  |  |
| 11 | Enter following for the selected allergy   1. Severity 2. OnSet 3. Comments (If required) |  |  |  |
| 12 | Click Save | Allergy will be saved on allergy list page | List page |  |
| 13 | Add ‘Vitals’ | Vital component will open |  |  |
| 14 | Enter following when recording the vitals   1. Weight 2. Height 3. Blood Pressure |  |  |  |
| 15 | Click Save | Vitals will be saved |  |  |
| **Setup**   * Doctor i.e Provider will logged in the application. | | Make user for provider using 1-10 steps | |  |
| **Step #** | **Action to Perform** | **Expected Outcome** | **Keywords** | **Notes/Definitions** |
| 1 | Add electronic signature for the user i.e provider, on demographics page insert signature from the box present at the lower right side of the page | Signature will be uploaded for the user | Signature |  |
| 2 | Give following rights to User from permission tab:   1. Personal 2. Patient 3. Add Patient 4. Billing 5. Demographics 6. Scheduling 7. Scheduler 8. Check In 9. Clinical 10. Create Note 11. Sign Note |  |  |  |
| 3 | Navigate to Patient>Provider Note | Note list page will open |  |  |
| 4 | Click on add ‘Provider Note’ | Add note screen will open | Provider Note |  |
| 5 | Select following when add note   1. Provider 2. Reason 3. Note Template ‘New Patient’ 4. Note Type |  |  |  |
| 6 | Click on ‘Create’ button | Provider note will be created |  |  |
| 7 | Click on ‘Diagnosis’ from left tree | Diagnosis light box will open |  |  |
| 8 | Add ‘Diagnosis’ | Add diagnosis screen with search panel to search ICD codes will open | Diagnosis |  |
| 9 | Search any ICD code and select it | Selected ICD Code will be selected | ICD Code |  |
| 10 | Enter following for the selected ICD Code   1. Type 2. OnSet 3. Severity 4. Comments (If required) |  |  |  |
| 11 | Click ‘Save’ | Diagnosis will be saved on the list page |  |  |
| 12 | Click ‘Accept’ | Diagnosis component will be saved on the provider note as SOAP text | SOAP |  |
| 13 | Click on ‘Procedure’ |  |  |  |
| 14 | Add ‘Procedure’ | Procedure light box will be opened |  |  |
| 15 | Search any CPT Code | Required CPT Code will be searched | CPT Code |  |
| 16 | Click ‘Save’ | CPT code along with its description will be saved on provider note as SOAP text |  |  |
| 17 | Click on ‘Medication’ |  |  |  |
| 18 | Add ‘Medication’ | Medication component will be open in light box |  |  |
| 19 | Search the required medication from search panel | Required medication will be searched |  |  |
| 20 | Add following for the selected medication |  | CPT Code |  |
| 21 | Click ‘Save’ | Medication will be saved on provider note as SOAP text |  |  |
| 22 | Provider will ‘Sign’ the note | Provider note will be signed with electronic stamp of the provider at the bottom of the note |  |  |
| **ESuperbill**   * User log in to the application using biller’s account to create eSuperbill from provider note * All Diagnosis and CPTs added on provider note should automatically populate on eSuperbill | |  | |  |
| **Step #** | **Action to Perform** | **Expected Outcome** | **Keywords** | **Notes/Definitions** |
| 1 | Click Diagnosis – ICDs link | Diagnosis pop up screen will display | ICD |  |
| 2 | Search and select the required ICD code | ICD code will be added to eSuperbill | eSuperbill |  |
| 3 | Check the E&M code checkbox. | E&M code will be added to eSuperbill | E&M |  |
| 4 | Click Procedures-CPTs link | Procedure Pop up screen will display | CPT |  |
| 5 | Add modifiers against CPT | Modifier should be added against CPT and modifier’s count should increase | Modifiers |  |
| 6 | Add Diagnosis Pointers (Dx. Ptr\*) | CPT should point to one or many pointers | Dx Ptr, Diagnosis Pointers |  |
| 7 | Enter Comments |  | eSuperbill comments | Checking/unchecking “Display Comments on Charges” field will display/hide eSuperbill comments on Charge page |
| 8 | Click Save & Sign | eSuperbill should get electronically signed | Electronic signature |  |
| 9 | Click Report button | eSuperbill report will print | eSuperbill report |  |
| 10 | Click “Create Charge” | Charge page will open up | Charge |  |
| **Charge**   * All Diagnosis and CPTs added on eSuperbill should automatically populate on Charge * Provider and Location are also added on Charge from eSuperbill | |  |  |  |
| 11 | Select Primary & Secondary Insurances |  | Primary Insurance |  |
| 12 | Select Rendering Provider from “Rendering” dropdown | Rendering provider name will appear in Rendering field | Rendering Provider | If Rendering Provider is also Billing Provider then click the checkbox against billing |
| 13 | Select Billing provider from “Billing” dropdown | Billing provider name will appear in Billing field | Billing Provider |  |
| 14 | Click “Diagnosis” link | Diagnosis pop up screen will display | Click Diagnosis – ICDs link | Diagnosis pop up screen will display |
| 15 | Search and select the required ICD code | ICD code will be added to eSuperbill | Search and select the required ICD code | ICD code will be added to eSuperbill |
| 16 | Click “Procedures” link | Procedure Pop up screen will display | CPT |  |
| 17 | Add modifiers against CPT | Modifier should be added against CPT and modifier’s count should increase | Modifiers |  |
| 18 | Add Diagnosis Pointers (Dx. Ptr\*) | CPT should point to one or many pointers | Dx Ptr, Diagnosis Pointers |  |
| 19 | Select Insurance from “Responsible Plan” dropdown |  |  |  |
| 20 | Click “Save” | Charge will get save | Charge |  |
| 21 | Select “Payment” from Payment dropdown | Post Payments page will open | Payments |  |
| 22 | Select “Professional” from Claim dropdown | Generate Claim page will open | Claim |  |
| **Claim Generation**   * Different types of claims can be generated depending upon the type of Insurance | |  |  |  |
| 23 | Click “EDI Claim” | Claim will generate | EDI claim | EDI claim button will appear only if Insurance supports Electronic claims. Generate HCFA claim for Paper based claims |
| 24 | Select HCFA type from dropdown |  |  |  |
| 25 | Click “Preview button” | HCFA claim form will open | HCFA |  |
| **Post Payments**   * All CPTs and their charged amount should populate on Payment page | |  |  |  |
| 26 | Select “Primary Insurance” from Payment By dropdown |  |  | By default the Plan selected in “Responsible Plan” dropdown from charge page is selected in Payment By dropdown |
| 27 | Select Payment method |  | Payment methods |  |
| 28 | Enter allowed amount |  | Write-off | Total amount allowed against CPT is entered. Any difference in the amount is auto populated in the Write-off column |
| 29 | Enter Paid amount |  |  | Actual paid amount is filled |
| 30 | Enter Transfer amount |  | Transfers | The amount entered in this column is transferred to the next responsible party |
| 31 | Select next responsible |  | Next responsible |  |
| 32 | Click “Save” | Payments will gets save, all the transferred amounts will display against CPT and the Next responsible will be get auto populate in “Payment By” dropdown | Payments |  |
| 33 | Repeat step 28 to 32 to complete the payments |  |  |  |
| 34 | Click “Statement” button | Patient Statement popup will display |  |  |
| 35 | Select statement template from “Template” dropdown |  |  |  |
| 36 | Check “Statement” radio button |  |  |  |
| 37 | Click “Preview” button | Patient Statement Report will open | Patient Statement |  |