

Revenue Cycle

Patient
Accounting

Charge
Services

Scheduling

Registration

HIM

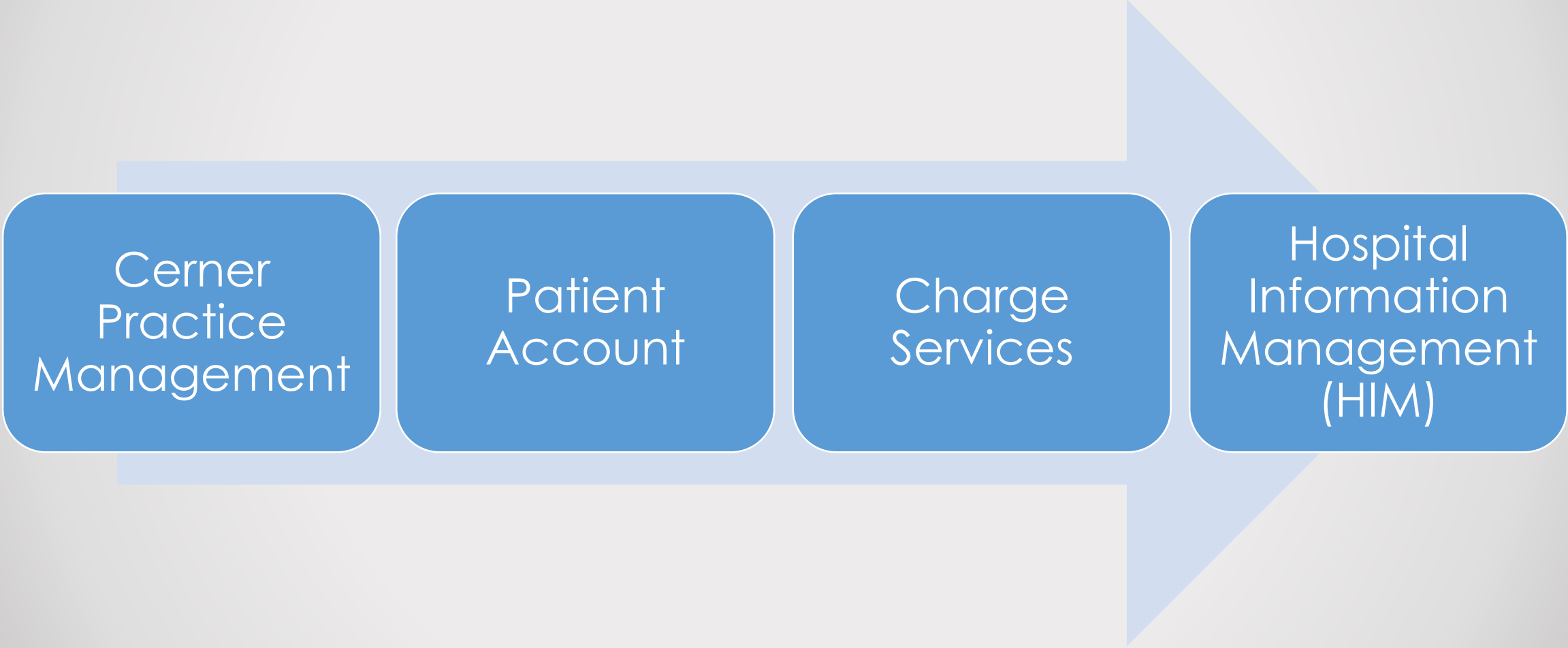


Cerner Revenue Cycle Solution

The Cerner Revenue Cycle solution is where you can access and review a patient's account.

This solution provides perspectives on the essential information you need for completing your daily tasks.

Main Areas Covered In This Course:



Cerner
Practice
Management

Patient
Account


Charge
Services

Hospital
Information
Management
(HIM)

Cerner Practice Management (CPM)

- Registration and Scheduling is an essential feature of Revenue Cycle that provides robust functionality to automate the physician office, clinic or large physician organization process. This solution provides capabilities for registration, scheduling, patient check in, patient check out and reporting.
- *Cerner Practice Management* makes all Registration and Scheduling workflows accessible from one framework and that allows the user easy navigation through entire solution.

Let's get started!



User name:

Password:

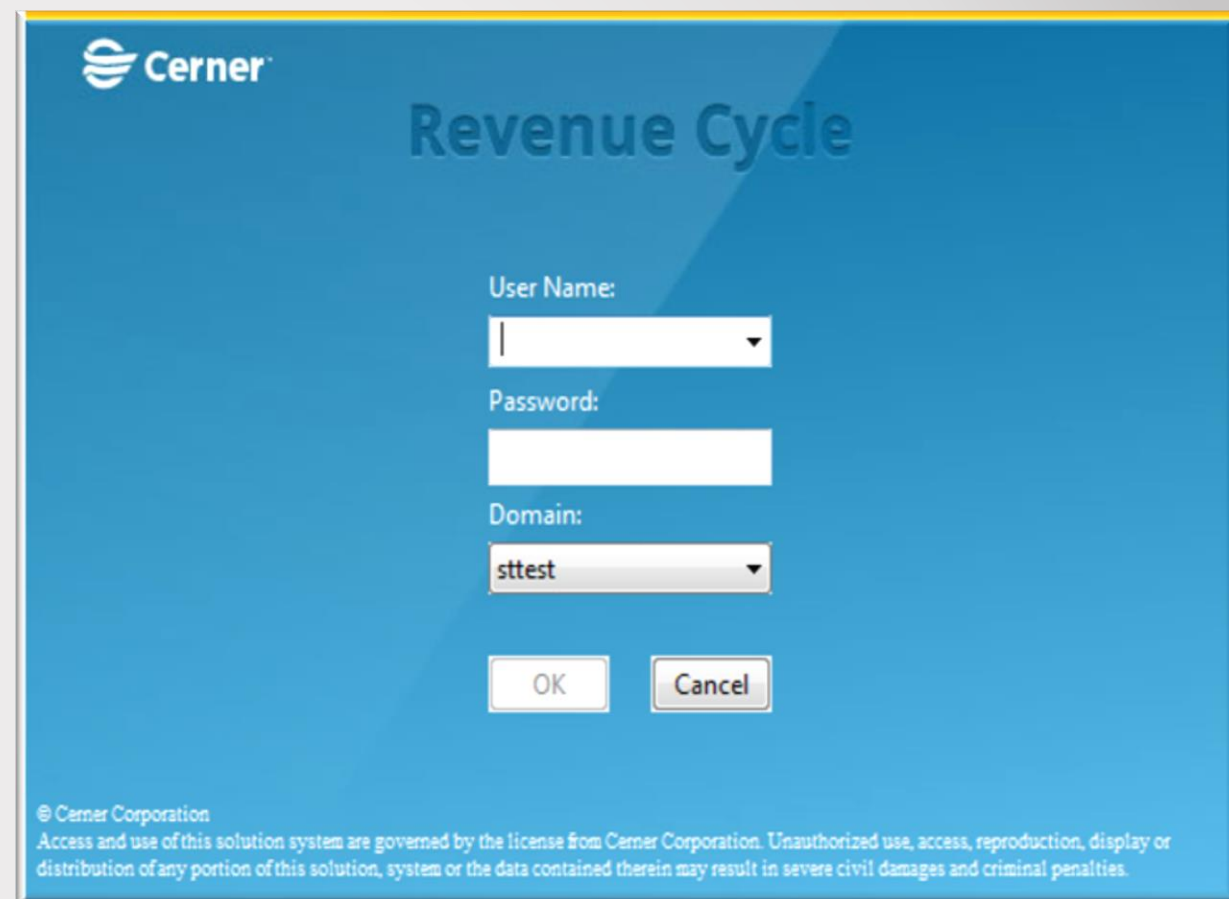
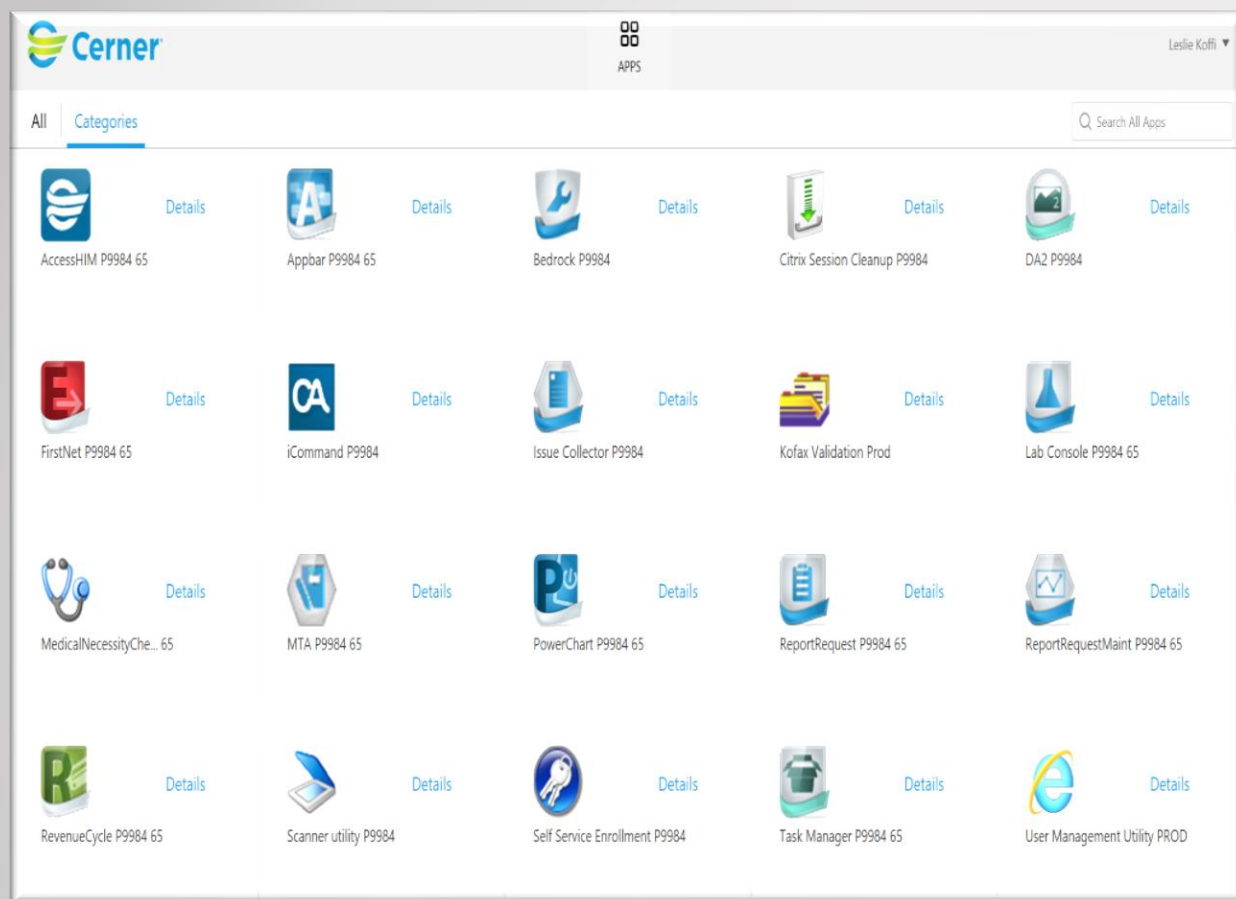
Domain:

[Log On](#)

[Account Self-Service](#)

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First, you must login to your
Citrix account.



Next, locate the Revenue Cycle application, and type your login credentials.

Revenue Cycle - History - ZZTEST, DARBY

File View Task Help

Search by Name






Appointments Registration Encounters Patient Account Charge Entry History ZZTEST, DARBY












ZZTEST, DARBY Male 27 years DOB: Oct 10, 1990 MRN: 252347

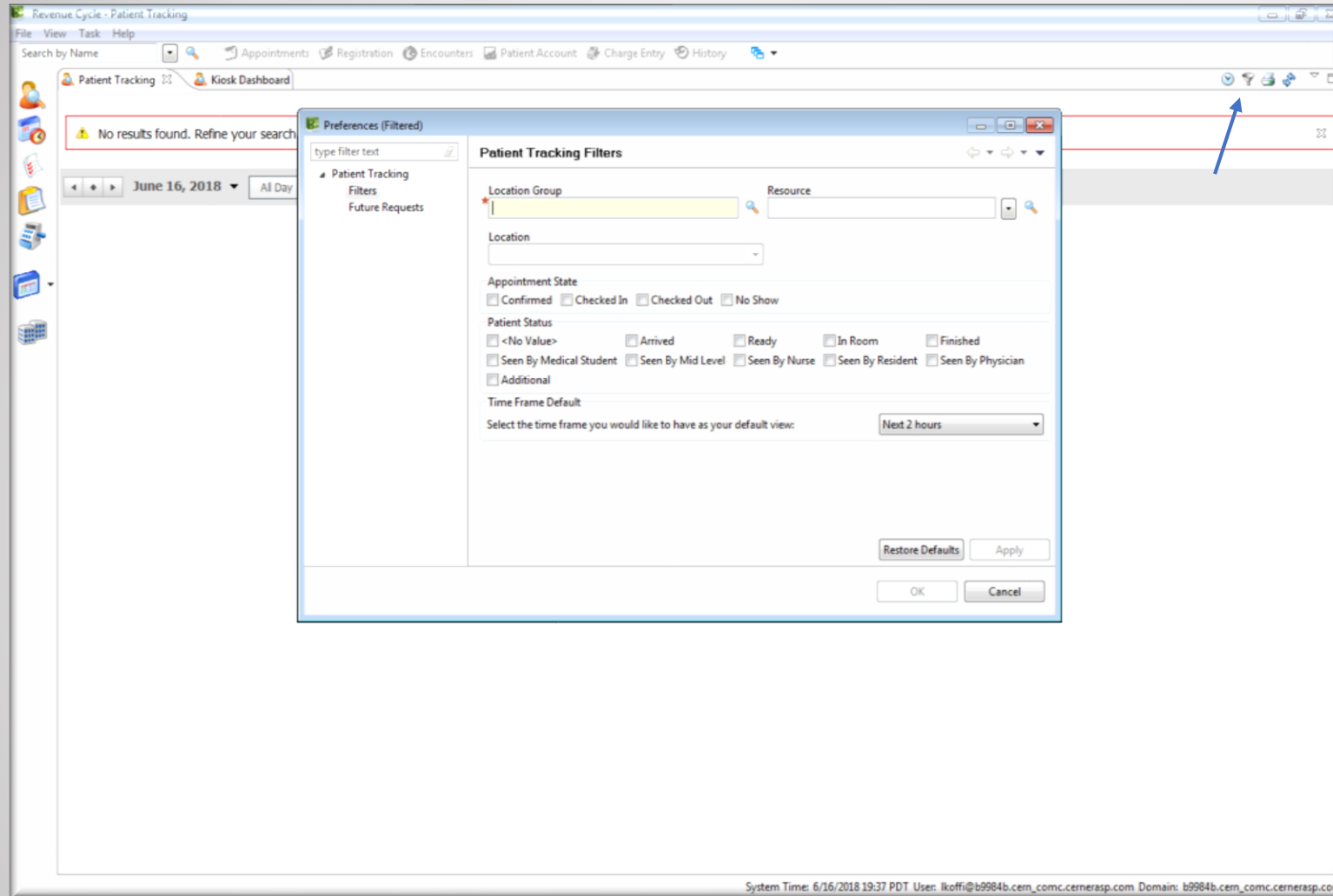
Accommodation Request Urgency Code Financial Class Admitting Physician

Encounter: 5045686

No data recorded

Button	Action
	Search Opens the Person Search window and allows you to locate a patient record. Click  beside the Find button to select the search filter you want to enter in the search box (such as Name or MRN) and to select the perspective you want to open after you have selected a patient.
 Charge Entry	Charge Entry Allows you to enter specific charges for a patient whose record is open.
 Patient Account	Patient Account Opens the Patient Account perspective and allows you to manage account information.
 Appointments	Appointments Opens the Appointments perspective and allows you to create appointments. This patient-specific perspective contains Future Appointments, Past Appointments, Requests, Add Appointment, Demographic Summary, Balance Summary, and Guarantors views. It is recommended for adding or modifying appointments and verifying patient demographic information.

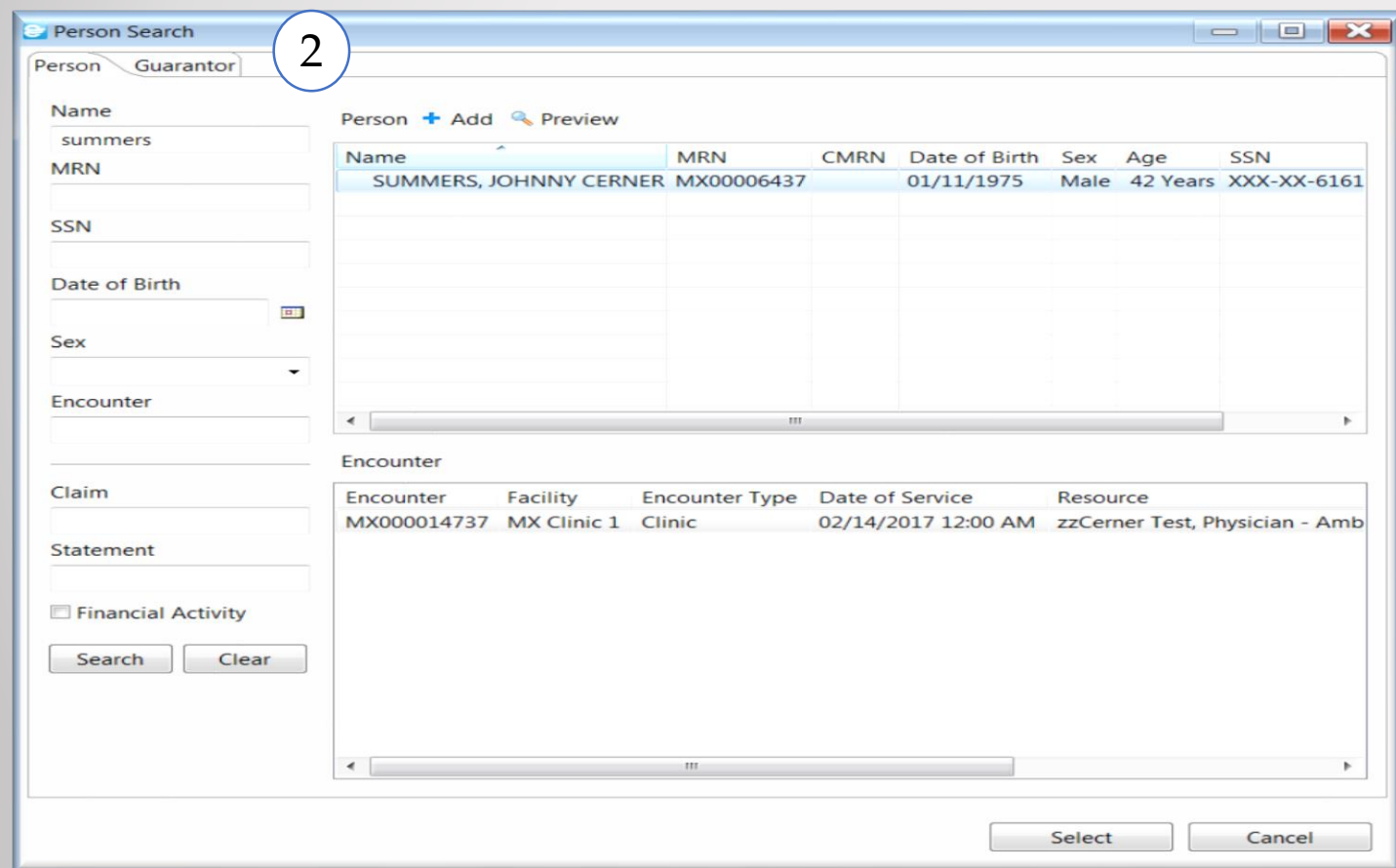
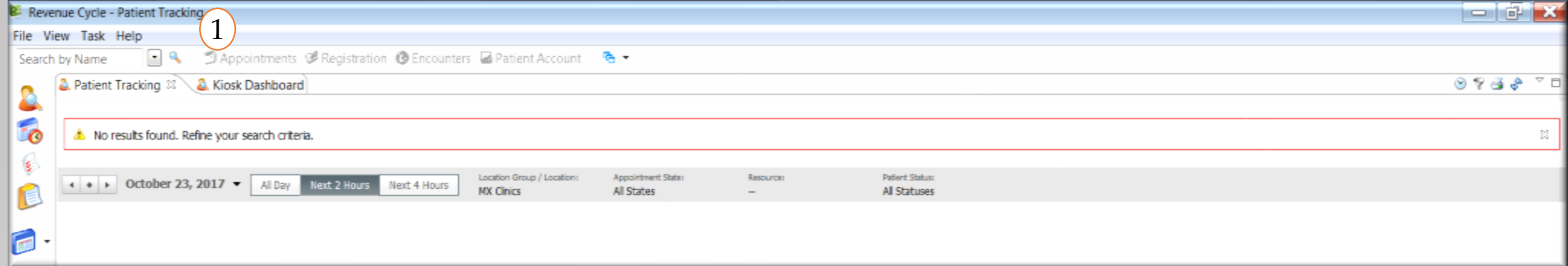
	Check In / Out Opens the Check In/Out perspective and allows you to take actions on the selected patient. (You can perform the actual checking in and out or indicate a no show from the patient list in Patient Tracking). This patient-specific perspective contains the Demographic Banner, Demographic Summary, Future Appointments, Past Appointments, Encounter Summary, Insurance Summary, Guarantors, and Add Appointment views. This perspective is recommended for when the patient arrives and also when they depart.
	Registration Opens the Registration perspective and allows you to view, enter, or modify patient, related person, guarantor, employer, and insurance information.
	Encounters Opens the Encounters perspective and allows you to add an encounter and enter information about the encounter. You can also view details for a selected encounter. This perspective is recommended for monitoring and maintaining the encounter information associated to the patient, including submitting and viewing eligibility and benefits.
	Open View Allows you to open a selected view. The views available for selection depend on the perspective that is currently open.
MOORE, JACK	Allows you to open a perspective with a menu command instead of a toolbar button. You can select Keep Open when you have a patient record open (for up to a maximum of five records). The patient name remains on the toolbar when you open a different record. You can click the name to retrieve the record you were looking at previously. If you click Close , the patient record is closed.
	My Workflow Allows you to view work lists to facilitate patient accounts.
	Charge Batch Entry Allows you to enter charges in batch.
	Patient Tracking Allows you to view a patient list of patients with scheduled appointments for today and take the following actions: check a patient in and out, no show a patient, and track wait times. It is recommended for use at the front desk and nurse stations to keep track of the patient while they are in the office.
	Resource View Allows you to select a resource and view and maintain its schedule. It can be used to start the process of scheduling a patient.
	Appointment Queues Allows you to select a date range and resource and then view a list of appointments that must be rescheduled or canceled. There are separate views for displaced appointments and standby appointments. It is recommended for managing appointments and for patients needing further action.
	Consumer Activity Allows you to update patient information without having to open each individual record.
	Alerts Allows you to schedule persons on a standby list. When you click Alerts on the toolbar, a list of persons on standby who can be scheduled now is displayed. Select a person from the list, and the Appointments perspective is opened. If you do not set up <u>standby preferences</u> , you will not get alerts.
	Create New Remittance Opens the Create New Remittance dialog box.




Set your locations filters

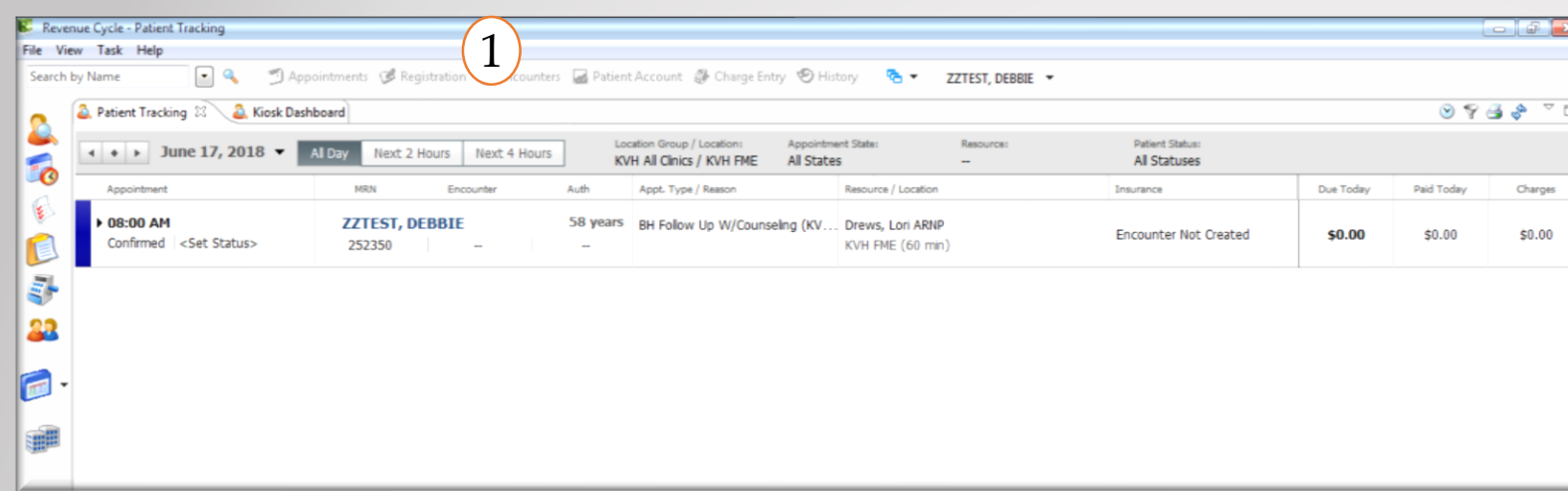
First, click the **funnel button** located at the top right corner to retrieve the **Patient Tracking Filters**. The location needs to be set for the user's preferences .

Select your organization in the **Location Group field** and select the current department you reside in the **Location and Resource field**, then click **Apply** and **Ok**. Patient's from your selected department should populate.

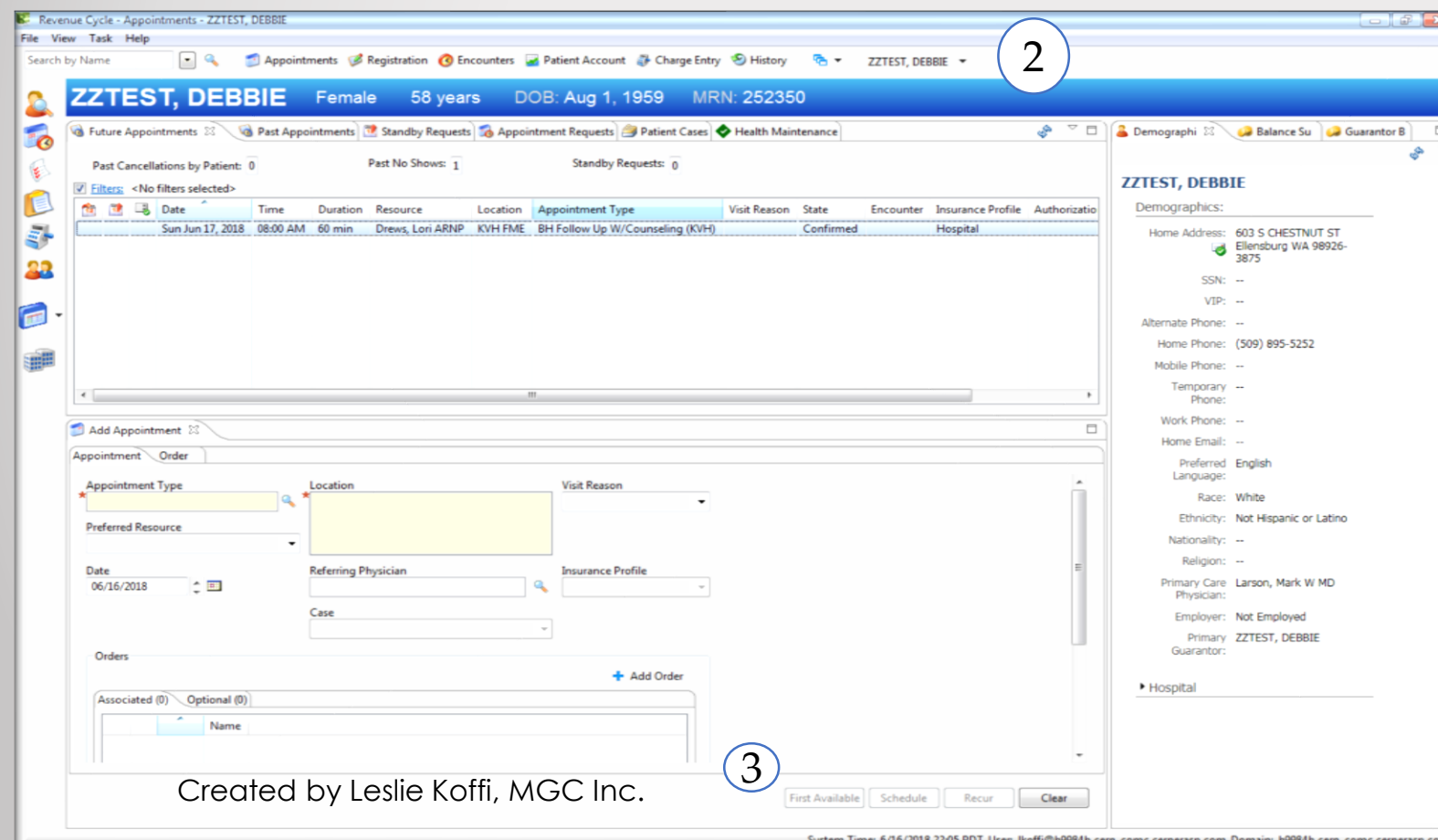


Let's learn how to schedule an appointment for an already existing patient!

1. First, your account should open to **Patient Tracking perspective** and if the Patient Tracking perspective does not open, click . Next, we need to locate the patient by typing his/her name in the Search by **Name field**.
2. Once you have located the patient, click Select.



Patient Tracking Perspective



- Once you are in the **Patient Tracking Perspective**, you should see a list of patients by either double clicking the patient's name or searching for the patient via **Search by Name field**. The patient's **Appointment Perspective** will be launched.
- After the **Appointment Perspective** is launched, in the Add Appointment section, select an Appointment type, Location, Referring Physician, Visit Reason, and Insurance Profile if available.
- Next, click the **scheduling type**.

First Available Times

SUMMERS, JOHNNY CERNER Male 42 years DOB: Jan 11, 1975 MRN: MX00006437 SSN: XXX-XX-6161

There are additional suggested times available that meet the entered criteria. Refine your suggest criteria.

Search By

☒ Date Range: Begin Date End Date

☐ Schedule In: 10/23/2017 11/23/2017

Time Restrictions

☒ None ☐ AM Only ☐ PM Only

☐ Time Range Start: 12:00 AM End: 11:59 PM

Patient Duration

☐ Override Patient Duration

15 Minutes

Day Exceptions

☐ Sunday ☐ Monday ☐ Tuesday ☐ Wednesday

☐ Thursday ☐ Friday ☐ Saturday

Location/Resource Restrictions

Location: MX Clinic 1 Resource:

Suggest Clear

Suggest Results

Location	Appointment Date	Start Time	Primary Resource	Slot Type	Patient Duration	Resource Duration
MX Clinic 1	Mon Oct 23, 2017	04:15 PM	Applegate, Cristina MD	MX Clinic 1 Est Pt	15	15
	Mon Oct 23, 2017	04:30 PM	Applegate, Cristina MD	MX Clinic 1 Est Pt	15	15
	Mon Oct 23, 2017	04:45 PM	Applegate, Cristina MD	MX Clinic 1 Est Pt	15	15
	Tue Oct 24, 2017	08:00 AM	Parreño, Ari MD	MX Clinic 1 Est Pt	15	15
	Tue Oct 24, 2017	08:15 AM	Parreño, Ari MD	MX Clinic 1 Est Pt	15	15
	Tue Oct 24, 2017	08:30 AM	Parreño, Ari MD	MX Clinic 1 Est Pt	15	15
	Tue Oct 24, 2017	08:45 AM	Parreño, Ari MD	MX Clinic 1 Est Pt	15	15
	Tue Oct 24, 2017	04:00 PM	Parreño, Ari MD	MX Clinic 1 Est Pt	15	15

Previous Set Next Set **Select** Cancel

Example: First Available

Choosing the **First Available option** will launch a list of suggested appointments with the nearest date/time possible. Click Select when finished.

Appointment Confirmation

1. Under the **Appointment Tab**, you can see the details of the appointment with the option to Modify, Print and View Resources(Scheduling Type) before clicking Confirm.
2. Next, you'll see the details of the appointment displayed in the **Future Appointments** tab as confirmed.

The screenshot displays a software interface for appointment management. At the top, a tab labeled 'Appointment' is selected, indicated by a circled '1'. Below this, various appointment details are shown in a form-like layout, including Appointment Type (FM ROV Routine Office Vis), Location (MX Clinic 1), Visit Reason, Preferred Resource, Referring Physician (Carter, Kristin Cerner), Insurance Profile (All Insurances), and Case. A 'Confirmation Information' section at the bottom left of the form shows the Date (Mon Oct 23, 2017), Patient Time (04:15 PM), Patient Duration (15 min), Resource Time (04:15 PM), Primary Resource (Applegate, Cristina MD), and Associated Orders. Buttons for 'View Resources', 'Modify', and 'Print' are located below this information. To the right of the form, 'Confirm' and 'Clear' buttons are visible, with 'Confirm' highlighted by an orange box.

Below the form, a patient information bar displays 'SUMMERS, JOHNNY CERNER' (Male, 42 years, DOB: Jan 11, 1975, MRN: MX00006437, SSN: XXX-XX-6161). Below this bar, a series of tabs are shown: 'Future Appointments', 'Past Appointments', 'Standby Requests', 'Appointment Requests', 'Patient Cases', 'Health Maintenance', and 'Guided Scheduling'. The 'Future Appointments' tab is selected and highlighted with an orange box, indicated by a circled '2'. Below the tabs, a message states: 'The patient has outstanding health maintenance recommendations. Click [here](#) to view.' Below this message, statistics are shown: 'Past Cancellations by Patient: 0', 'Past No Shows: 0', and 'Standby Requests: 0'. A 'Filters' section shows '<No filters selected>'. At the bottom, a table displays appointment details, with the first row highlighted by an orange box:

Date	Time	Duration	Resource	Location	Appointment Type	Visit Reason	State	Encounter	Insurance Profile	Authorizations	Case
Mon Oct 23, 2017	04:15 PM	15 min	Applegate, Cristina MD	MX Clinic 1	FM ROV Routine Office Visit		Confirmed		All Insurances		

Revenue Cycle - Patient Tracking

File View Task Help

Search by Name Appointments Registration Encounters Patient Account SUMMERS, JOHNNY CERNER

Patient Tracking Kiosk Dashboard

October 23, 2017 All Day Next 2 Hours Next 4 Hours Location Group / Location: MX Clinics Appointment State: All States Resource: --

Appointment	MRN	Encounter	Auth	Appt. Type / Reason
<p>04:15 PM</p> <p>Confirmed <input type="button" value="Set Status"/></p> <p><input type="button" value="Arrived"/></p>	SUMMERS, JOHNNY CERNER MX00006437	--	42 years --	FM ROV Routine Office Visit

Patient Check In

Once a patient arrives at facility, the user will be prompted to check-in the patient. Patient Check-In is located in **Patient Tracking**. However, we must first confirm that the patient has Arrived and hence complete the following patient demographic and insurance verification process before a formal Check-In.

Revenue Cycle - Patient Tracking

File View Task Help

Search by Name Appointments Registration Encounters Patient Account SUMMERS, JOHNNY CERNER

Patient Tracking Kiosk Dashboard

October 23, 2017 All Day Next 2 Hours Next 4 Hours Location Group / Location: MX Clinics Appointment State: All States Resource: --

Appointment	MRN	Encounter	Auth	Appt. Type / Reason
<p>04:15 PM</p> <p>Confirmed <input type="button" value="Arrived"/></p> <p><input type="button" value="Check In"/></p> <p><input type="button" value="No Show"/></p>	SUMMERS, JOHNNY CERNER MX00006437	--	42 years --	FM ROV Routine Office Visit

Demographics Details

Revenue Cycle - Registration - ZZTEST, DEBBIE

File View Task Help

Search by Name

Appointments Registration Encounters Patient Account Charge Entry History *ZZTEST, DEBBIE

ZZTEST, DEBBIE Female 58 years DOB: Aug 1, 1959 MRN: 252350

Demographics Transaction History Viewer Guarantor Balance Summary Patient Cases

Patient Relationships Insurance

Selected Facility

Facility SSN No SSN Reason MRN

Name

Last Name First Name Middle Name Suffix Nickname

ZZTEST DEBBIE

Demographics

Sex Date of Birth Preferred Language Interpreter Required Races Ethnicities

Female 08/01/1959 English White Not Hispanic or Latino

Additional Demographics

Home Address

Address Line 1 Address Line 2

603 S CHESTNUT ST

Zip Code City State County Country

98926-3875 Ellensburg WA Kittitas US

Alternate/Billing

Address Line 1 Address Line 2

Zip Code City State County Country

Contact Information

Home Phone Mobile Phone Work Phone Work Extension E-Mail Address Reason For No Email

(509) 895-5252 () - () - Unknown

HealthLife Enrollment

Patient Portal Registration Invite Status Online Identity Link Status Error Reason

Access Offered Send Invite Challenge Question Challenge Answer

No

Providers

Primary Care Physician

Larson, Mark W MD

Comment Notification

System Time: 6/17/2018 03:44 PDT User: lkoffi@b9984b.cern.com Domain: b9984b.cern.com

Demographic Details

Update any patient level information as appropriate by first clicking the green pencil located on the top right, and click **Save** when finished.

You might be brought to the other tabs within the conversation for required fields.

If prompted to search for a related person under **Relationship** tab, click **Add**. Enter a Role of **Emergency Contact** and select **Friend** as the Type if needed. Enter a phone number and click ok.

You might then be brought to the Legal Forms tab. Select **Yes** for Verify Legal Forms.

You might then be brought to the Insurance tab. Select **Yes** for Verify Person Insurance.

Click **Save** when all required fields are filled out.

Note: Pink fields are recommended fields to fill out. Yellow are required. You might be brought to the other tabs within the conversation for required fields.

1

Modify Encounter

SUMMERS, JOHNNY CERNER Male 42 years DOB: Jan 11, 1975 MRN: MX00006437

ⓘ Certain fields cannot be modified. The encounter is related to a future appointment.

Details | Guarantor | Insurance

Yes

+ Add ▾ Add From Person Modify Remove Submit Eligibility Eligibility Details

Profile Type	Begin Date	End Date	Seq	Health Plan	Payer	Subscriber	Plan Begin Date	Plan End Date	Member Number
Unassociated				Blue Cross	Blue Cross	SUMMERS, JOHNNY CERNER	02/14/2017		4644564

2

Add Insurance Profile

SUMMERS, JOHNNY CERNER Male 42 years DOB: Jan 11, 1975 MRN: MX00006437

Profile Type: Health Professional Begin Date: 03/27/2017 End Date:

Insurances

Manage Insurance Sequence Insurances

Seq	Health Plan	Payer	Financial Class	Subscriber	Member Number	Group Number	Begin Date	End Date
1	Blue Cross	Blue Cross	Commercial	SUMMERS, JOHNNY CERNER	4644564		02/14/2017	

OK Cancel

3

Modify Encounter

SUMMERS, JOHNNY CERNER Male 42 years DOB: Jan 11, 1975 MRN: MX00006437

ⓘ Certain fields cannot be modified. The encounter is related to a future appointment.

Details | Guarantor | Insurance

Yes

+ Add ▾ Add From Person Modify Remove Submit Eligibility Eligibility Details

Profile Type	Begin Date	End Date	Seq	Health Plan	Payer	Subscriber	Plan Begin Date	Plan End Date	Member Number
Health Professional	03/27/2017		1	Blue Cross	Blue Cross	SUMMERS, JOHNNY CERNER	02/14/2017		4644564

Medicare Secondary Payer Questionnaire
Medicare Secondary Payer

MSPQ + Add ▶ Resume Modify View Summary View Answers

Financial Responsibility

Save Cancel

Insurance Information

1. Click the **Insurance** tab. Verify that the correct insurance is selected for today's visit. Click **Save**. You will be brought back to the **Patient Tracking** view. The Add Insurance Profile window will launch.
2. Select **Manage Insurance** and select patient's Blue Cross plan. Click Ok to close the window. Patient's Profile Type is now populated on the Modify Encounter window. Click Save.
3. When clicking save, if you receive "Profile Association Required" window, click ok on the window. You will be then brought back to the Modify Encounter conversation. Follow the next steps associated to the Profile.

1

Appointment
▲ 04:15 PM Checked In Ready

2

Appointment	MRN	Encounter	Auth	Appt. Type / Reason
▲ 04:15 PM Checked In Ready	SUMMERS, JOHNNY CERNER	42 years	FM ROV Routine Office Visit	
MX00006437 MX000015017 --				
Reset In Room Left Not Seen	Demographics Details			

3

Appointment	MRN	Encounter	Auth	Appt. Type / Reason
▲ 04:15 PM Checked In In Room	SUMMERS, JOHNNY CERNER	42 years	FM ROV Routine Office Visit	
MX00006437 MX000015017 --				
Reset Finished Left Not Seen	Demographics Details			

4

Appointment	MRN	Encounter	Auth	Appt. Type / Reason
▲ 04:15 PM Checked In Finished	SUMMERS, JOHNNY CERNER	42 years	FM ROV Routine Office Visit	
MX00006437 MX000015017 --				
Check Out Undo Check In	Demographics Details			

Patient Ready/Depart

1. The patient has been checked in and the status bar changes to **White**.
2. In the **Status** column, select **Ready**.
Note: The next step in this workflow is when the patient goes to the room. From that point the end user would update the status to **In Room**.
3. Within **Patient Tracking**, the clinician updates the **Status** column to **Finished**.
4. Patient now goes to the Check Out desk where the Check Out Staff updates the **Appointment State** to **Checked Out**.

1

Revenue Cycle - Encounters - ZZTEST, DEBBIE

File View Task Help

Search by Name

Appointments Registration Encounters Patient Account Charge Entry History *ZZTEST, DEBBIE

ZZTEST, DEBBIE Female 58 years DOB: Aug 1, 1959 MRN: 252350

Encounters Encounter Details Patient Cases

Encounter: 5045707, 06/17/2018

Filters

Encounter	Facility	Encounter Type	Begin Date	End Date	Resource	Guarantor	Client	Primary Health Plan	Primary Payer	Service Facility	POS Code	POS Admit Date	Case	Case Des
5045707	KVH Family Medicine Ellensburg	Clinic Outpatient	06/17/2018		Drews, Lori A ARNP	ZZTEST, DEBBIE	Regence Blue Shield	Blue Cross-Blue Shield						
5045697	KVH Hospital	Day Surgery	06/05/2018	06/05/2018	Penoyer, Thomas M MD	ZZTEST, DEBBIE	Regence Blue Shield	Blue Cross-Blue Shield						
5045664	KVH Hospital	Observation	05/08/2018		Noyes, Kelly M DO	ZZTEST, DEBBIE	Regence Blue Shield	Blue Cross-Blue Shield						

Encounter Perspective

2

Revenue Cycle - Encounters - ZZTEST, DEBBIE

File View Task Help

Search by Name

Appointments Registration Encounters Patient Account Charge Entry History *ZZTEST, DEBBIE

ZZTEST, DEBBIE Female 58 years DOB: Aug 1, 1959 MRN: 252350

Encounters Encounter Details Patient Cases

Encounter: 5045707, 06/17/2018

Details Insurance

Selected Facility

Facility: KVH Family Medicine Ellensburg Building: KVH Family Medicine Ellens Building Nurse Unit: KVH FME

Encounter: 5045707 Financial Responsibility:

Place of Service

Service Facility: POS Code: POS Admit Date:

Visit Details

Encounter Type: Clinic Outpatient Patient Case: Previous Patient Type: Historical

Begin Date: 06/17/2018 End Date: Client:

Providers

Resource: Drews, Lori A ARNP Referring Physician: Supervising Physician:

Accident/Work Comp Information

Accident Related Visit: No Type: Date: State:

Comments

Guarantors

+ Add Add From Person ddr View Remove Sequence Guarantors

Seq	Name	Relationship	Home Phone	Mobile Phone	Work Phone	Home Address	Mailing Address	Begin Date	End Date
1	ZZTEST, DEBBIE	SELF	(509) 895-5252			603 S CHESTNUT ST Ellensburg WA 98926-3875		05/08/2018	

System Time: 6/17/2018 04:03 PDT User: lkoffi@b9984b.cem.com.cernerasp.com Domain: b9984b.cem.com.cernerasp.com

1. Under the encounter tab you'll see a list of all past and present encounters or patient visits.
2. Under the Encounter Details tab you'll see the information of a specific encounter.

Revenue Cycle - Encounters - ZZTEST, DEBBIE

File View Task Help

Search by Name

Appointments Registration Encounters Patient Account Change Entry History

ZZTEST, DEBBIE Female 58 years DOB: Aug 1, 1959 MRN: 252350

Details Insurance

Selected Facility

Facility Building Nurse Unit

Encounter Financial Responsibility

Place of Service

Service Facility POS Code POS Admit Date

Visit Details

Encounter Type Patient Case

Begin Date End Date Client

Providers

Resource Attending Referring Physician Supervising Physician

Accident/Work Comp Information


Accident Related Visit Type Date State

Comments

Save Cancel

☒ Add Encounter
☐ Add Hx Encounter

Adding an Encounter

In order to create a new or historical encounter, click the button  (see previous slide Fig. #1) located on top right corner. Click Details and locate the button on the top right corner and choose whichever encounter you wish to launch. Fill in the necessary details, then click Save.

Revenue Cycle - Encounters - ZZTEST, DEBBIE

File View Task Help

Search by Name

Appointments Registration Encounters Patient Account Change Entry History

ZZTEST, DEBBIE Female 58 years DOB: Aug 1, 1959 MRN: 252350

Details

Selected Facility

Facility Building Nurse Unit

Encounter

Visit Details

Encounter Type Historical

Begin Date End Date Client

06/16/2018 06/16/2018

Providers

Resource Referring Physician Supervising Physician

Accident

Type Date State

Comments

Save Cancel

This concludes our CPM section.

