Revenue Cycle

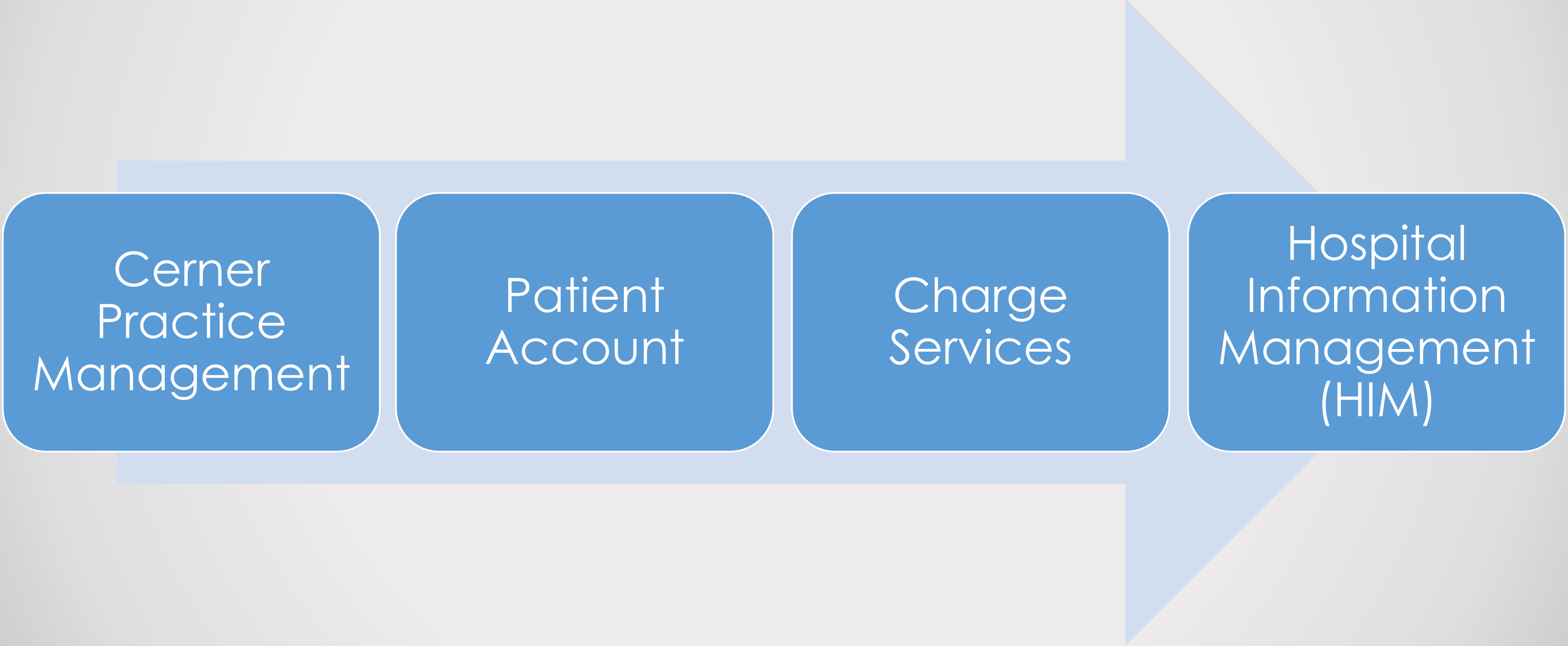
- Patient Accounting
- Charge Services
- Scheduling
- Registration
- HIM

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.

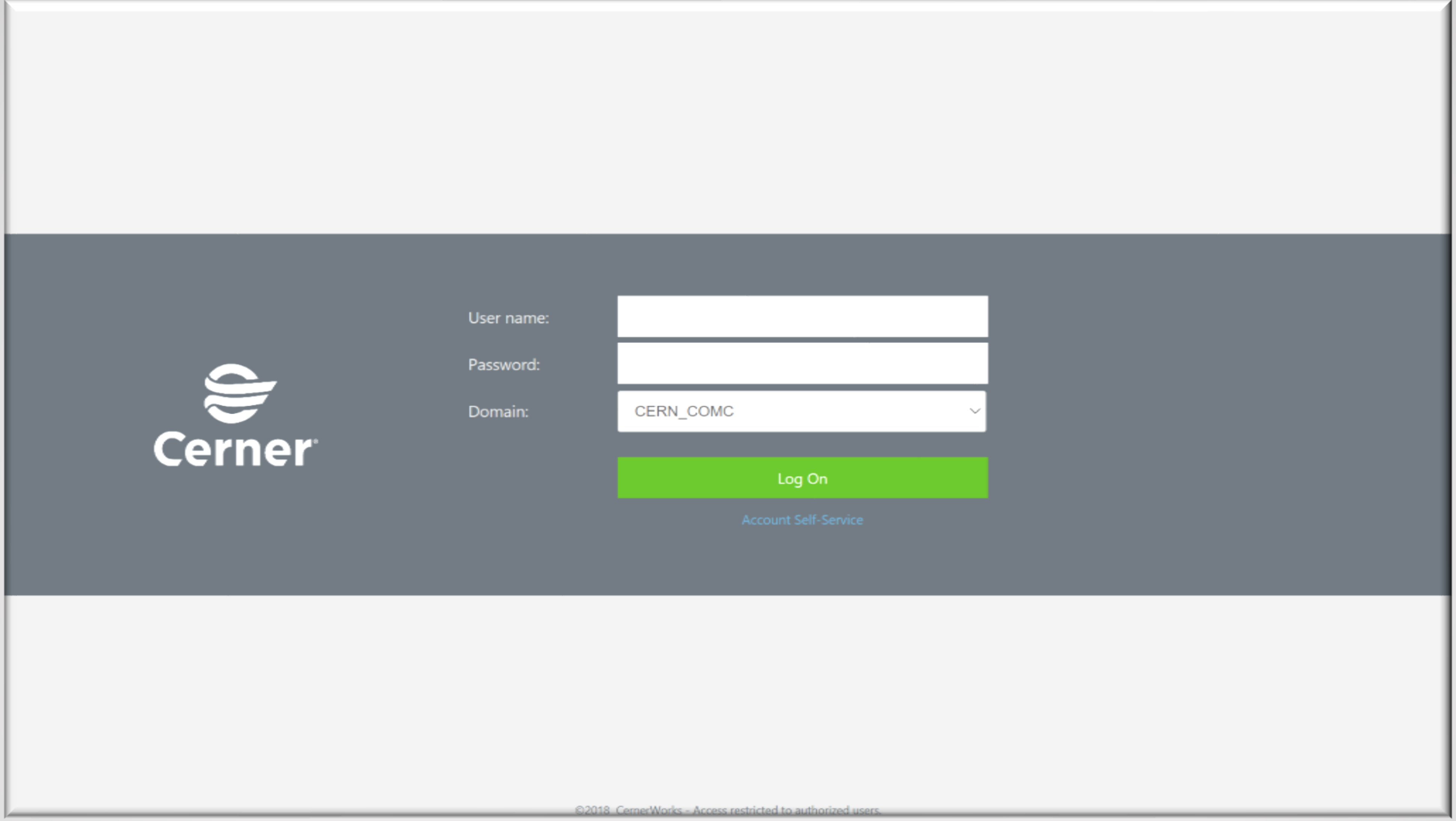
Main Areas Covered In This Course:



Cerner Practice Management (CPM)

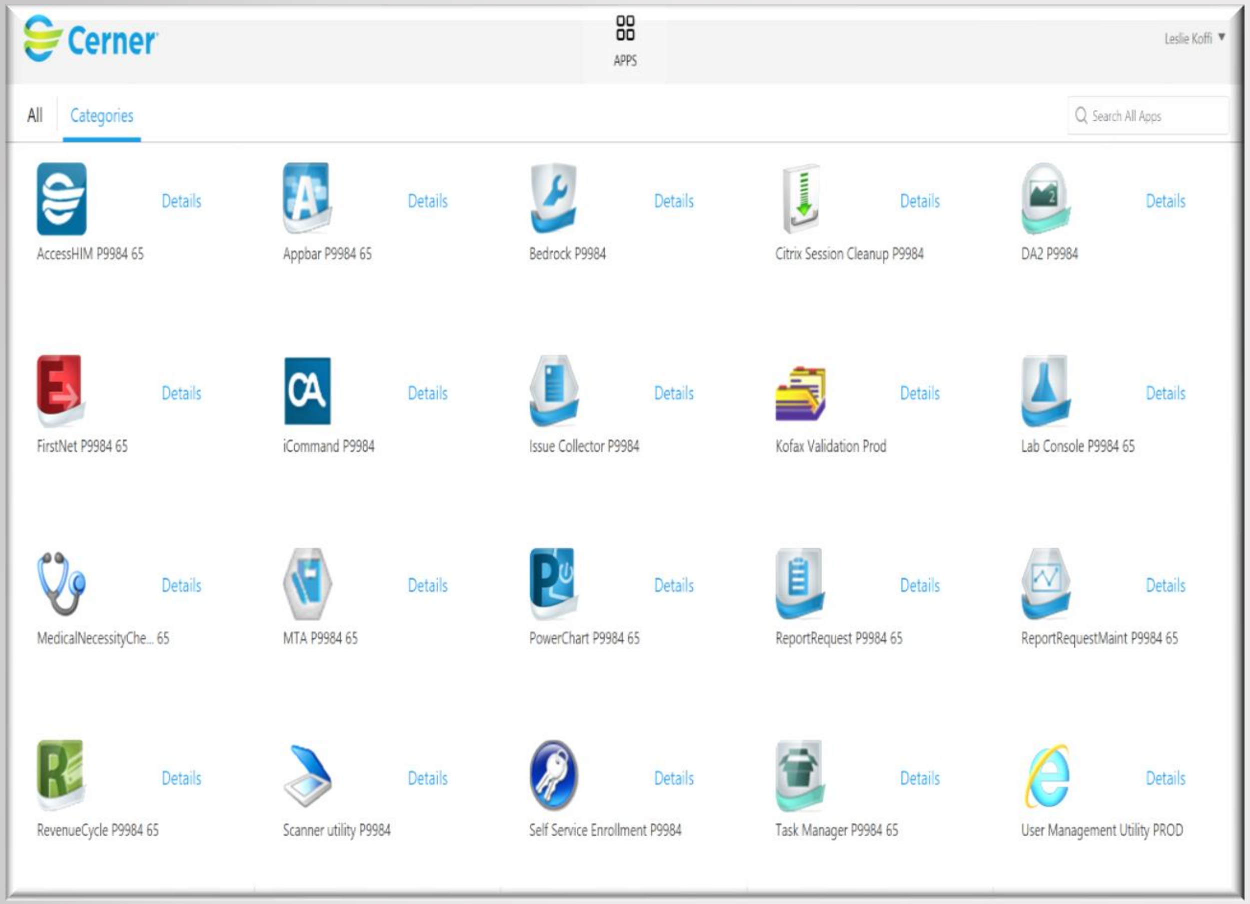
- Registration and Scheduling is an essential feature of Revenue Cycle that provides robust functionality to automate the physician office, clinic or large physician organization process. This solution provides capabilities for registration, scheduling, patient check in, patient check out and reporting.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

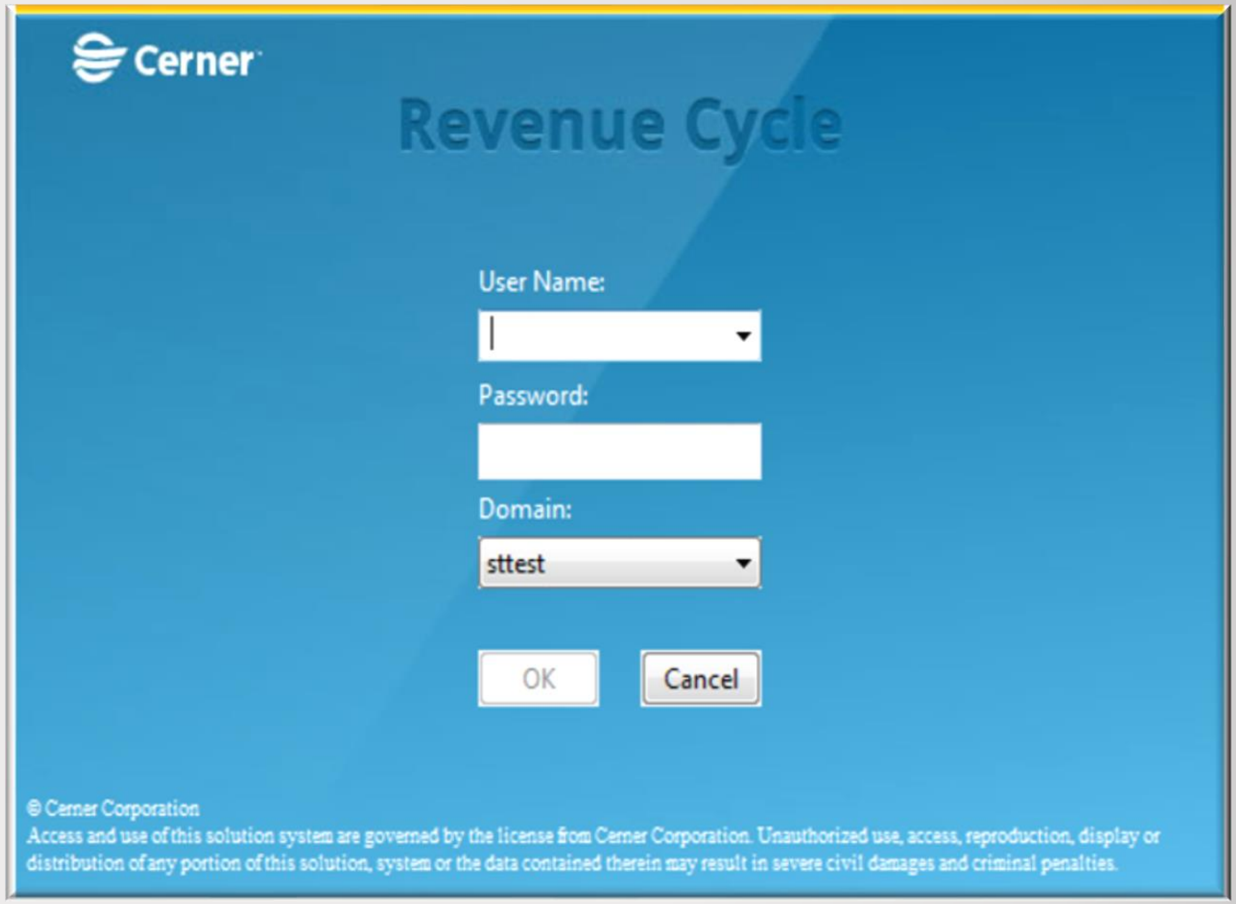
Let's get started!



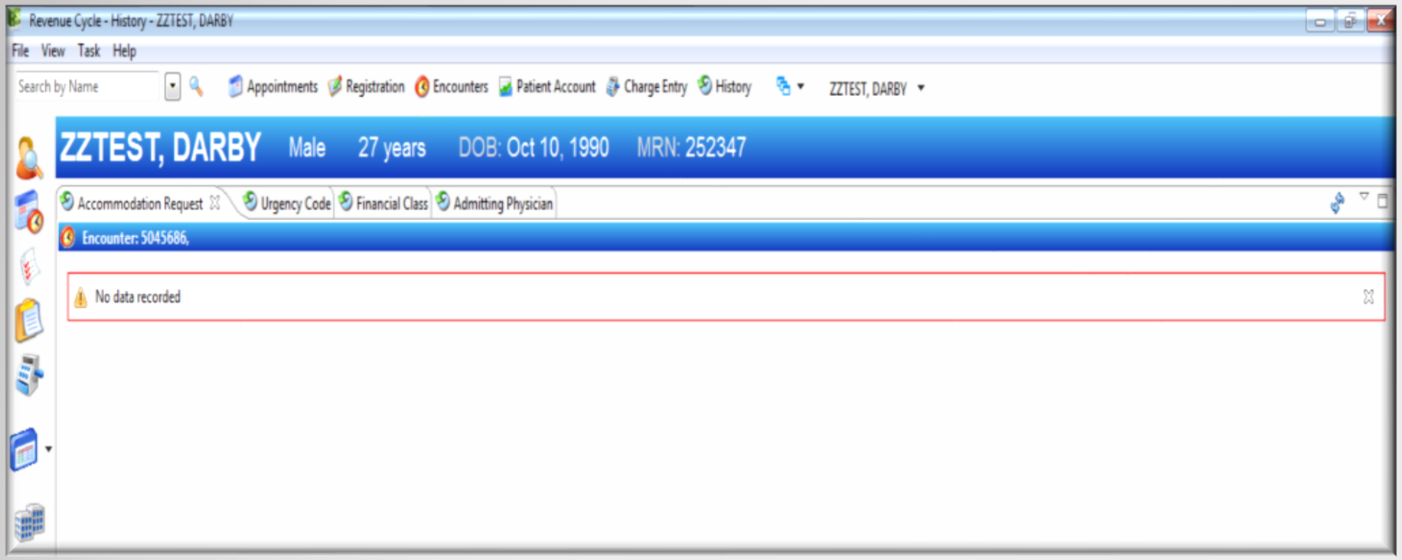
First, you must login to your

Citrix account.





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



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.

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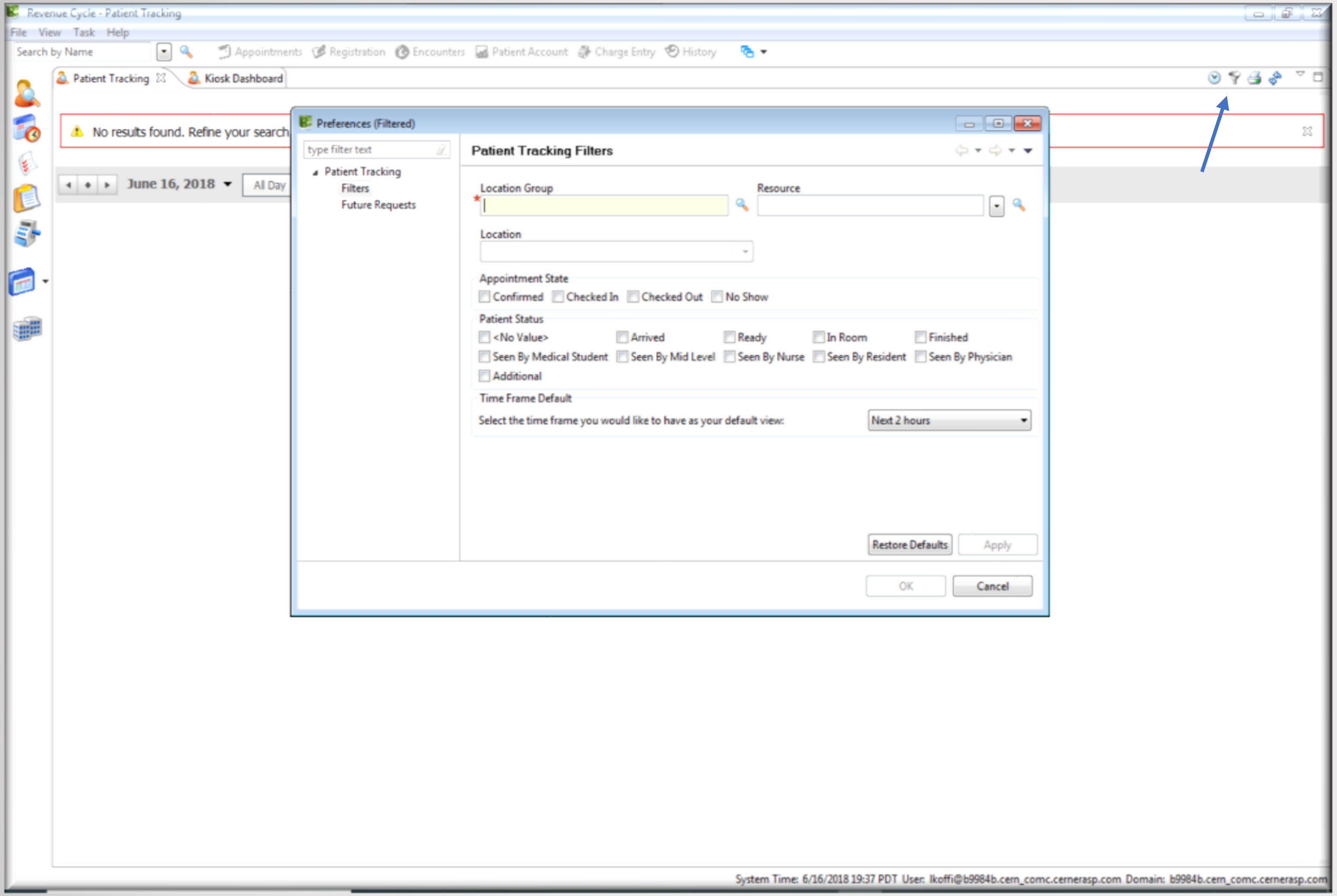
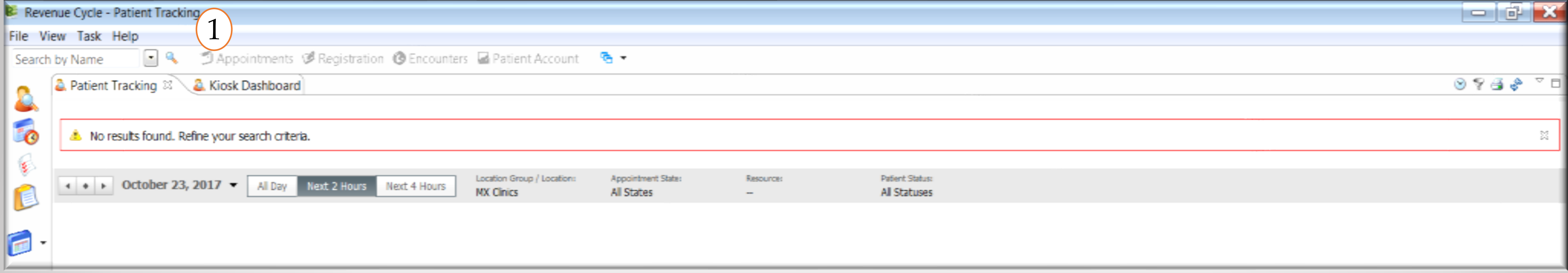
Check In / Out	**Check In/Out** Opens the Check In/Out perspective and allows you to take actions on the selected patient. (You can perform the actual checking in and out or indicate a no show from the patient list in Patient Tracking). This patient-specific perspective contains the Demographic Banner, 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	**Registration** Opens the Registration perspective and allows you to view, enter, or modify patient, related person, guarantor, employer, and insurance information.
Encounters	**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 Entry	**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 standby preferences, you will not get alerts.
	Create New Remittance Opens the Create New Remittance dialog box.

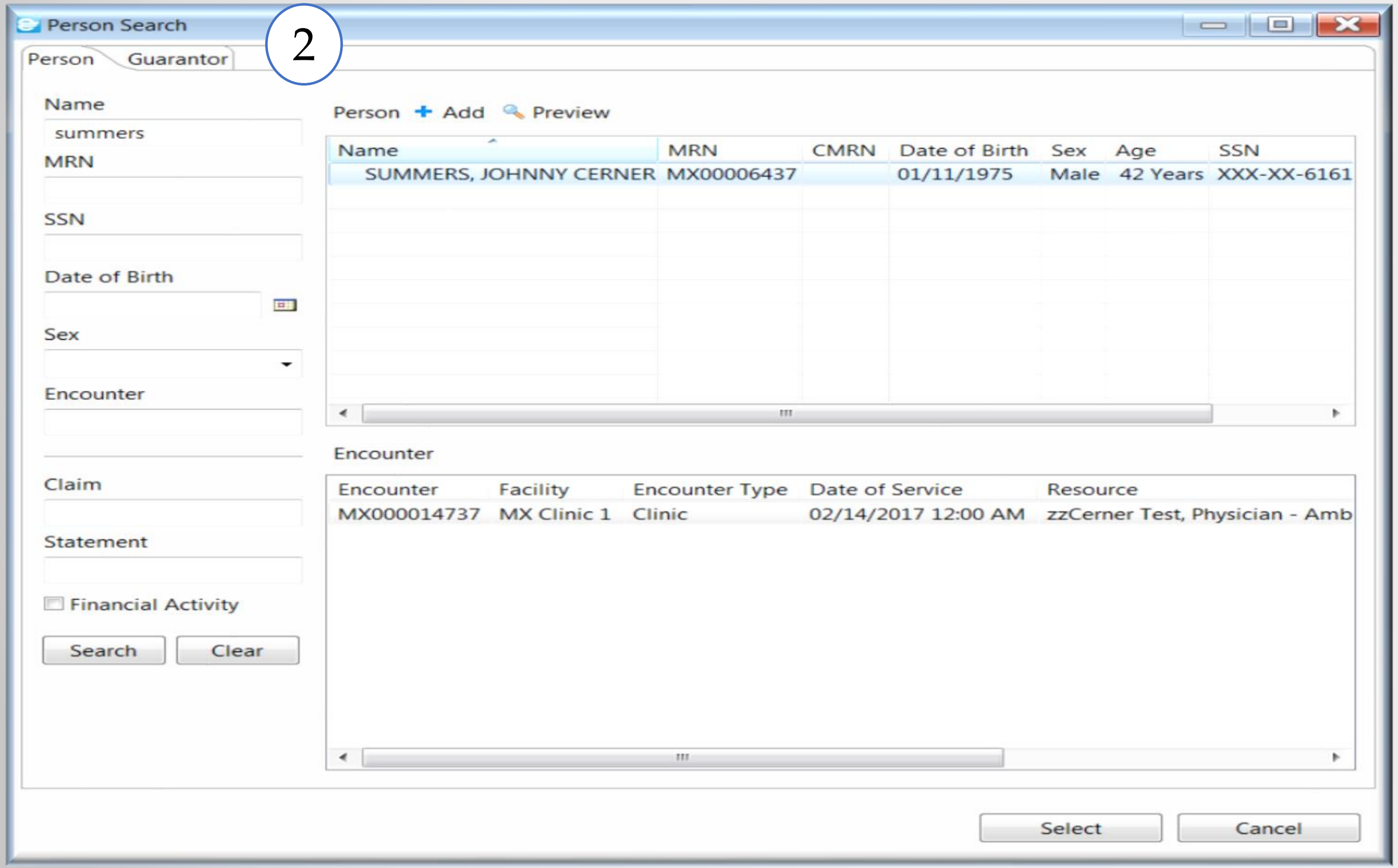


Set your locations filters

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 .

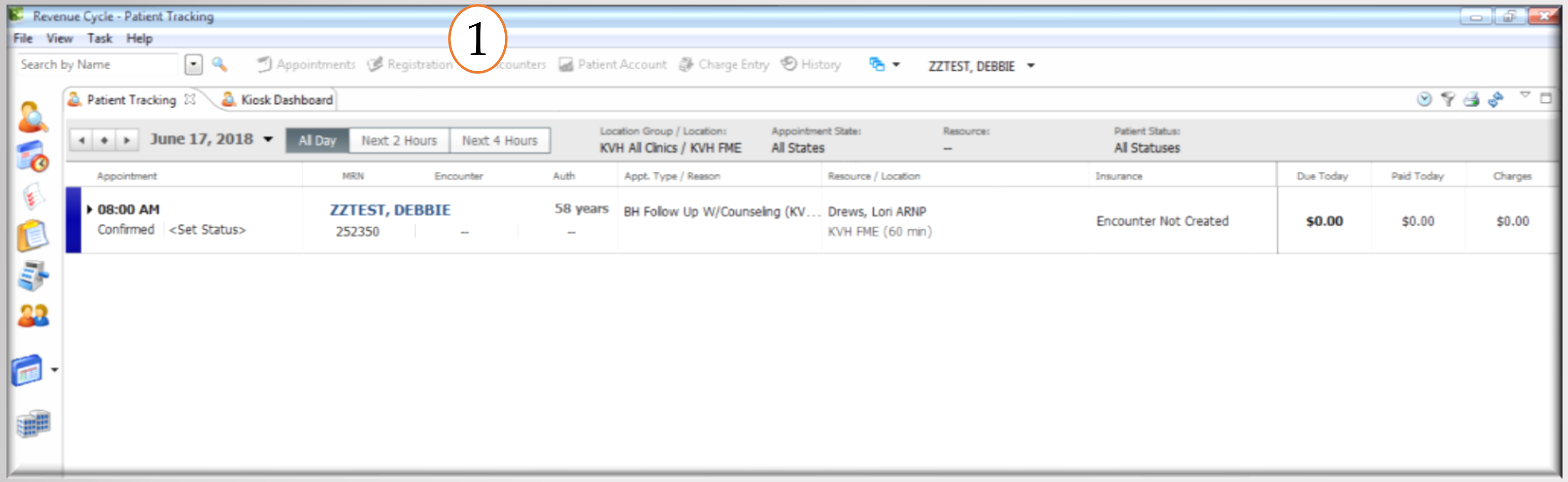
Select your organization in the **Location Group field** and select the current department you reside in the **Location and Resource field**, then click **Apply** and **Ok.** Patient's from your selected department should populate.

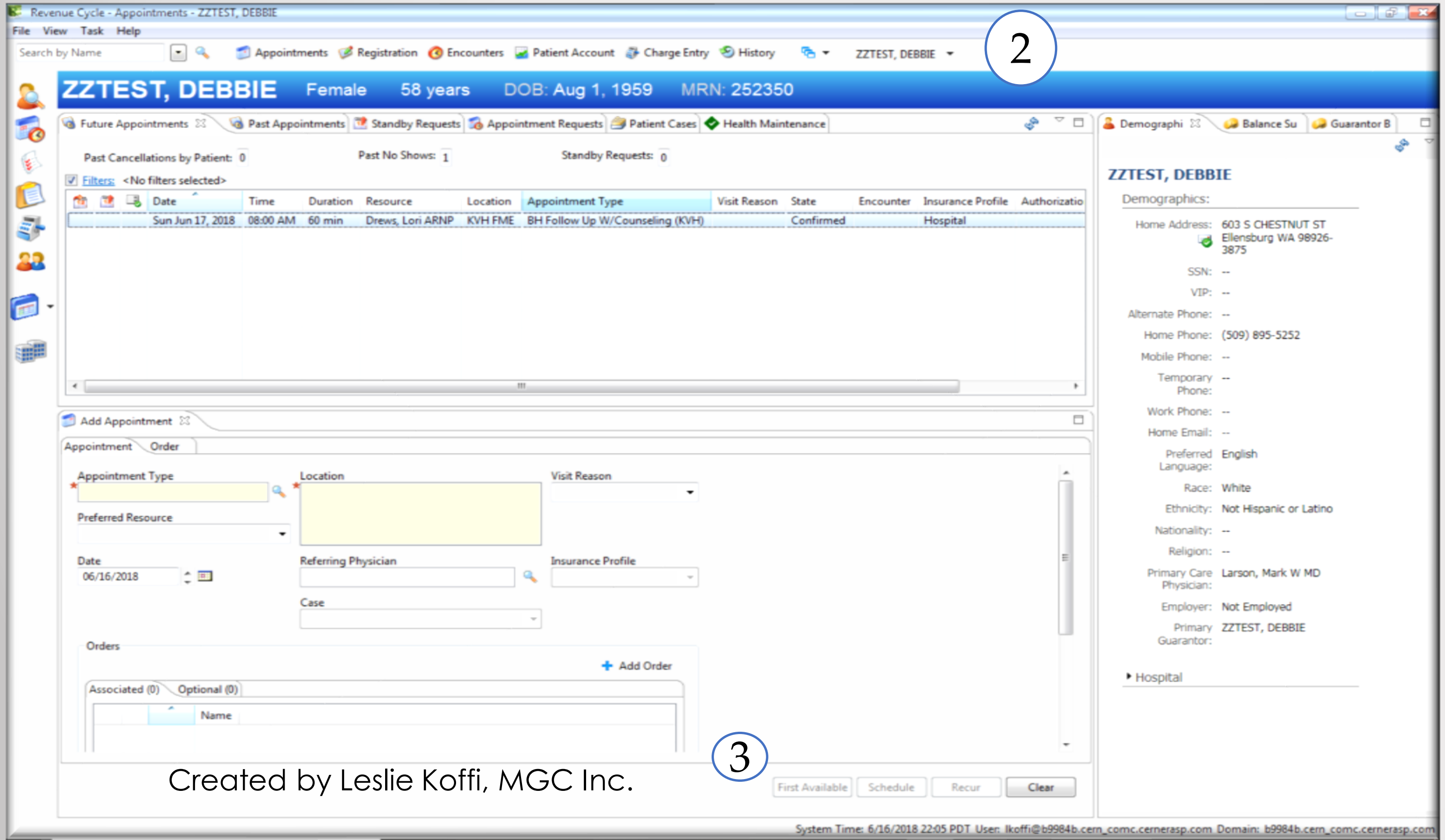




Let's learn how to schedule an appointment for an already existing patient!

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.





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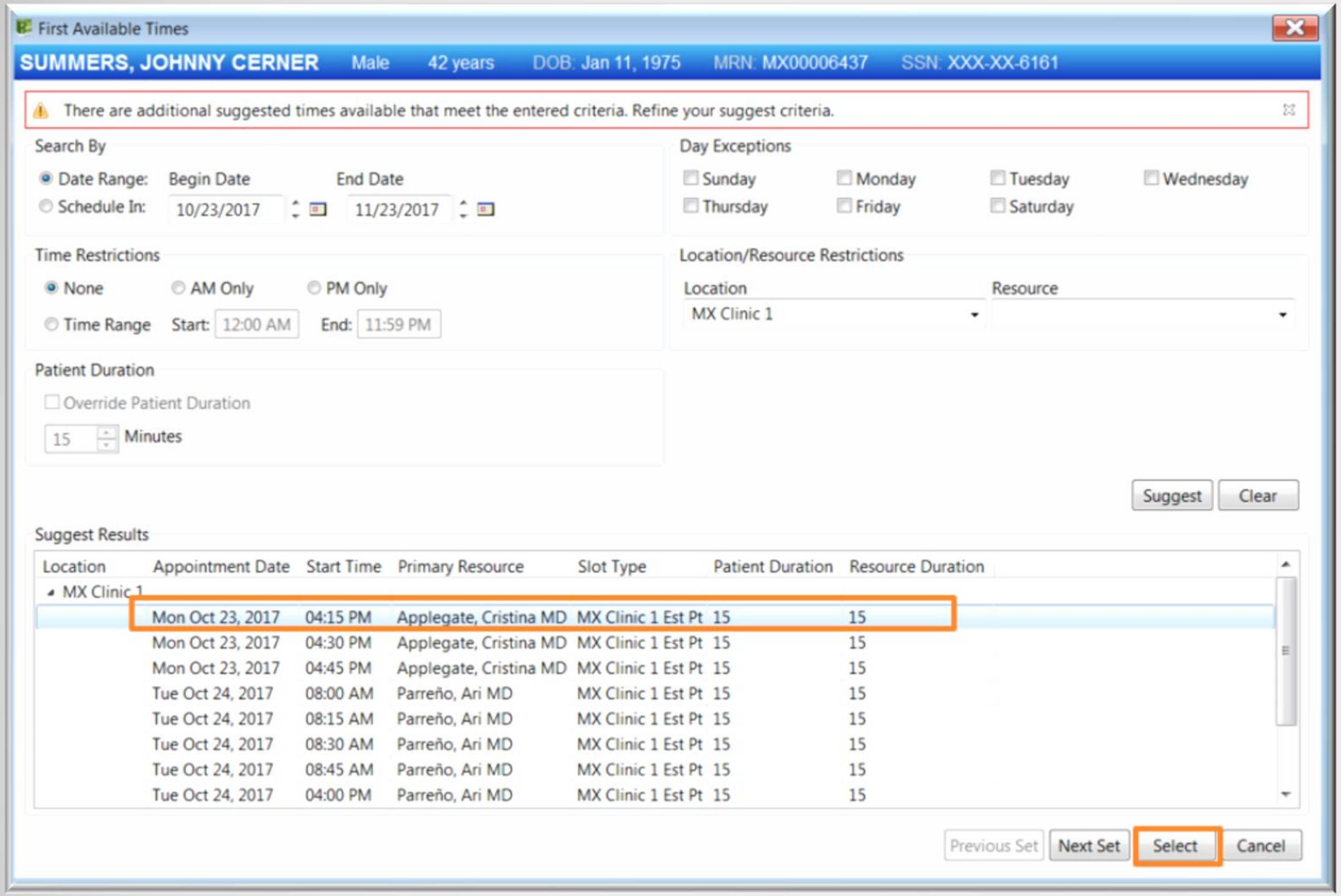
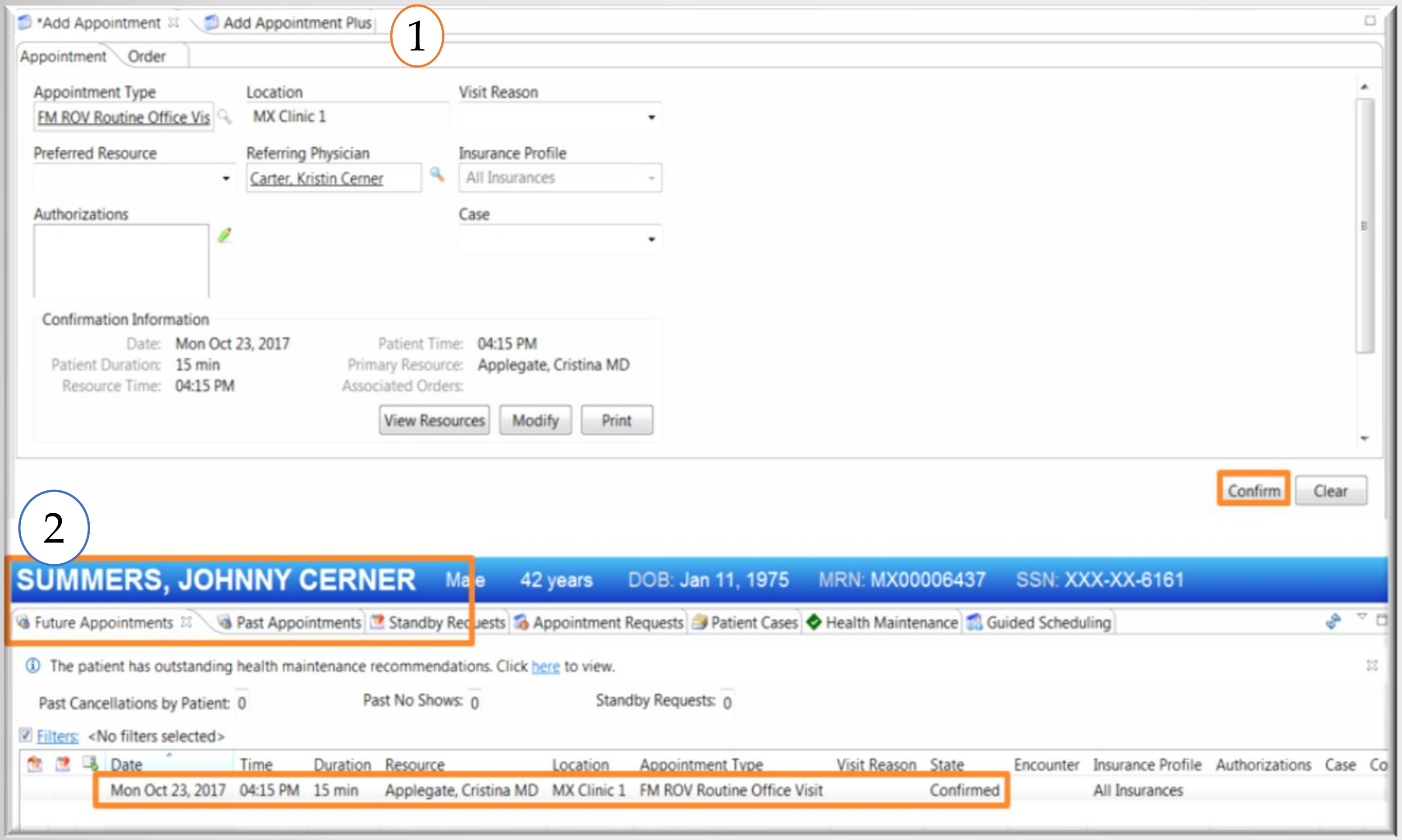
Patient Tracking Perspective

1. 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.
2. 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.
3. Next, click the **scheduling type**.



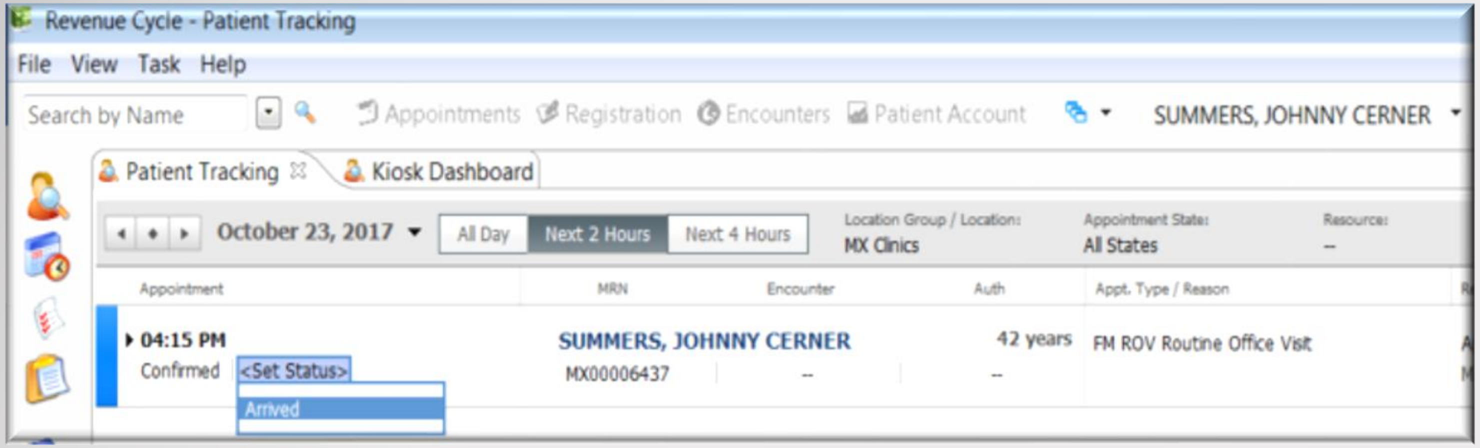
Example: First Available

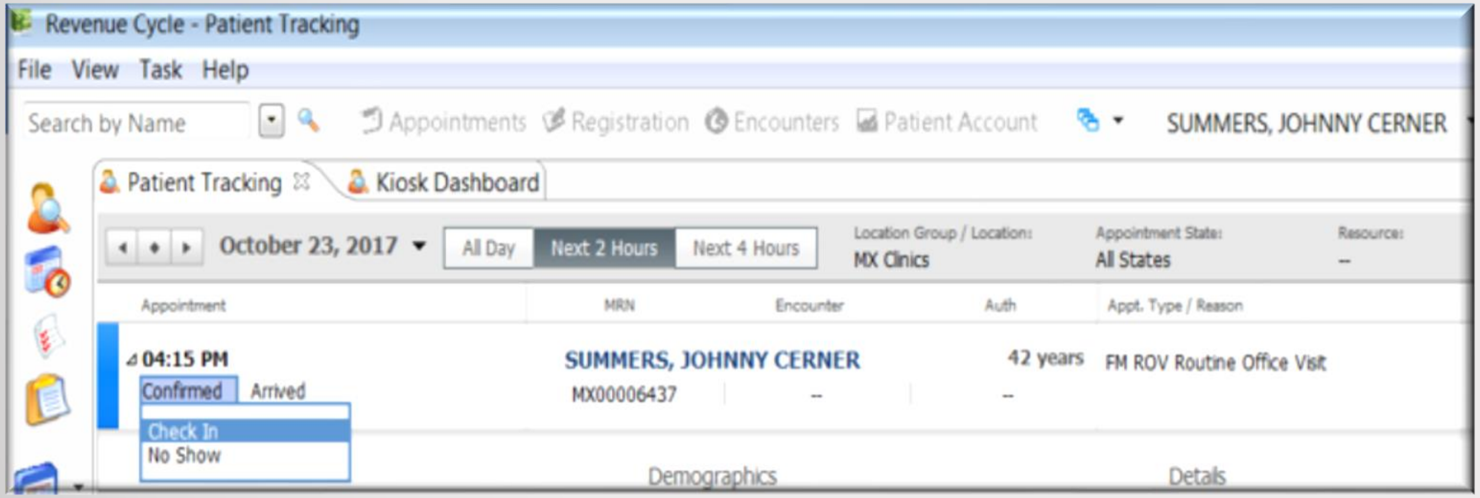
Choosing the **First Available option** will launch a list of suggested appointments with the nearest date/time possible. Click Select when finished.



Appointment Confirmation

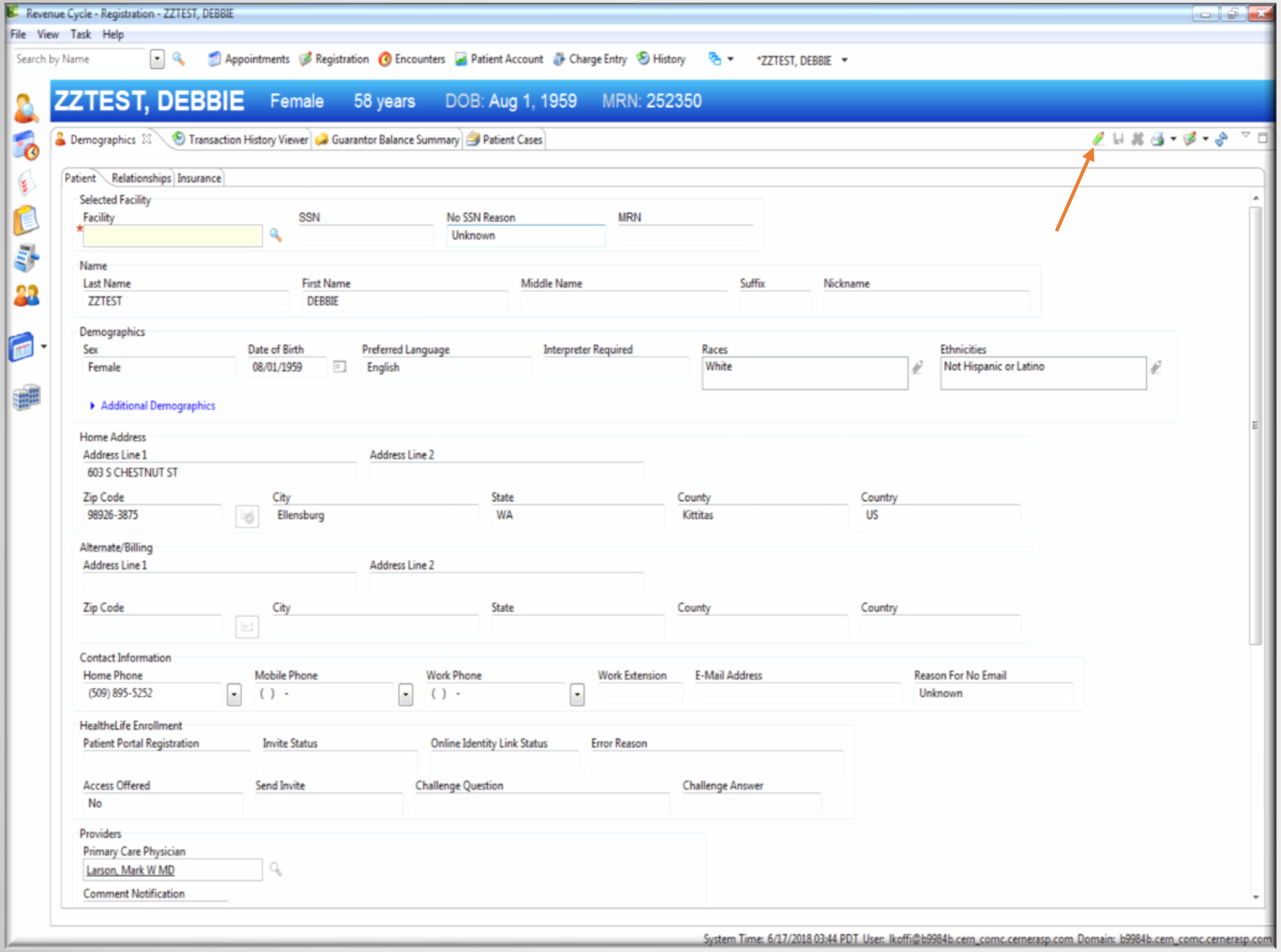
1. Under the **Appointment Tab**, you can see the details of the appointment with the option to Modify, Print and View Resources(Scheduling Type) before clicking Confirm.
2. Next, you'll see the details of the appointment displayed in the **Future Appointments** tab as confirmed.





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.



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.

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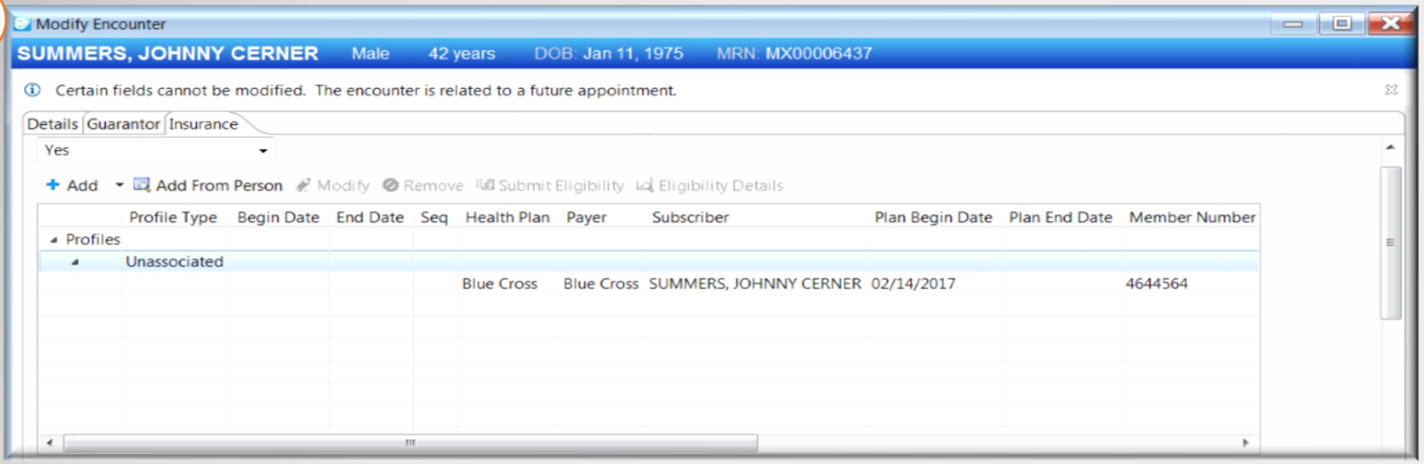

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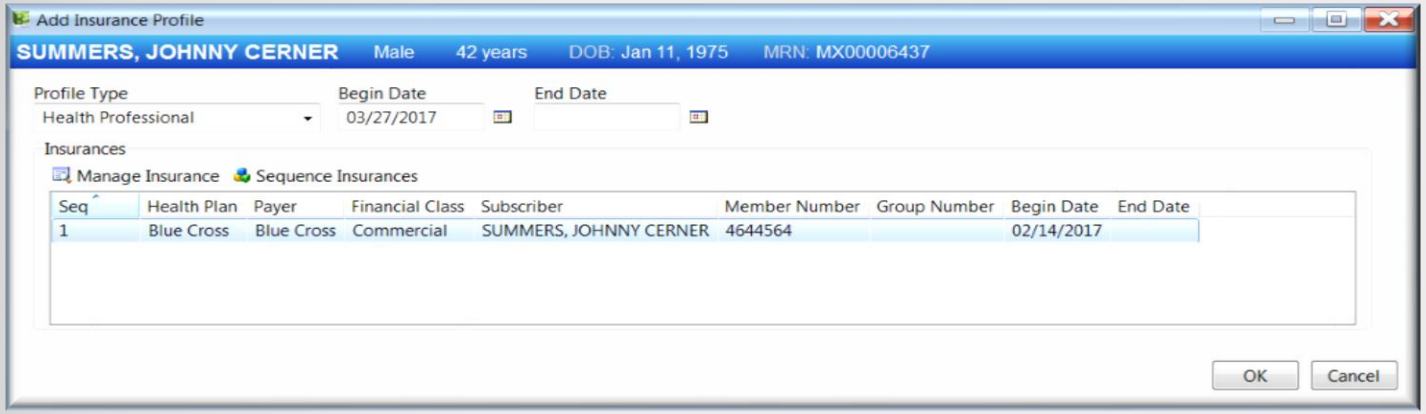

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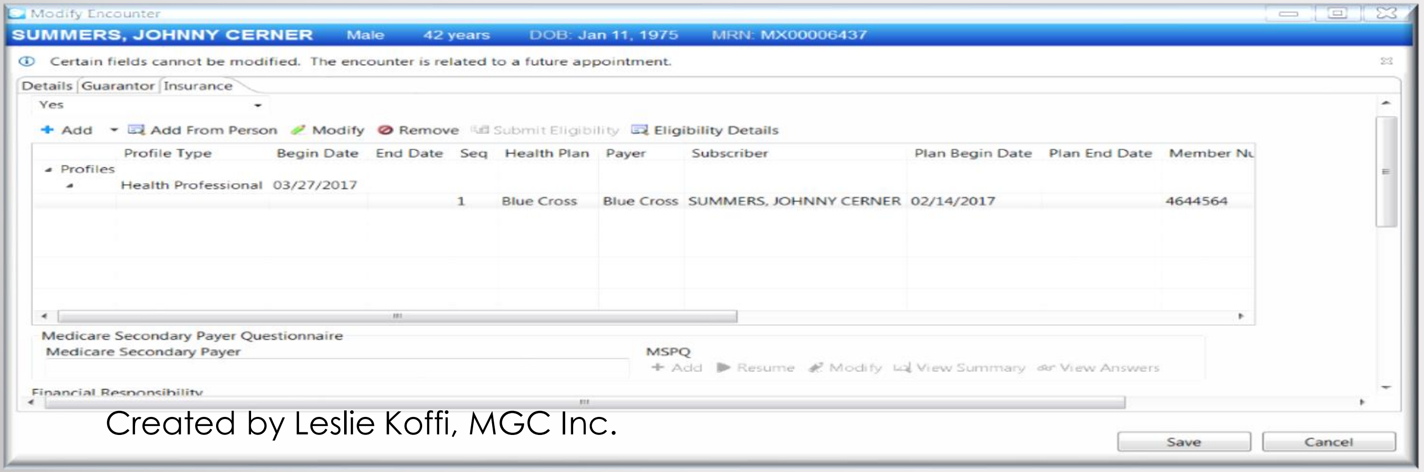

Insurance Information

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.

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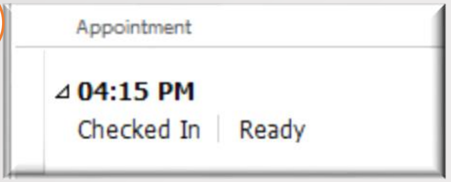

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Patient Ready/Depart

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**.

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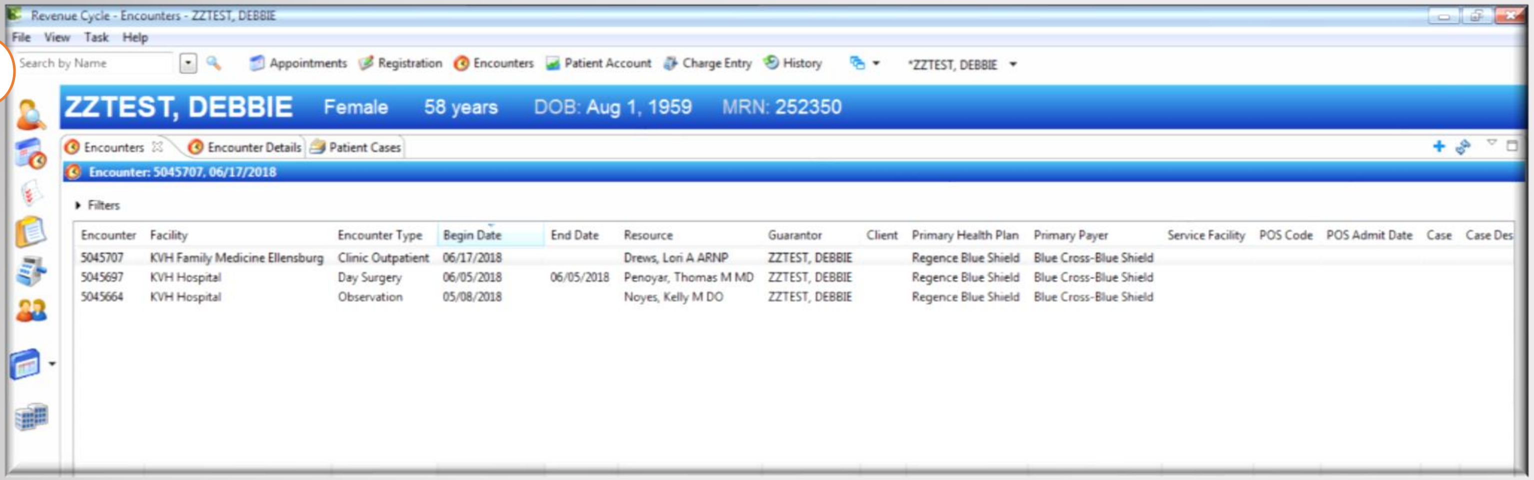

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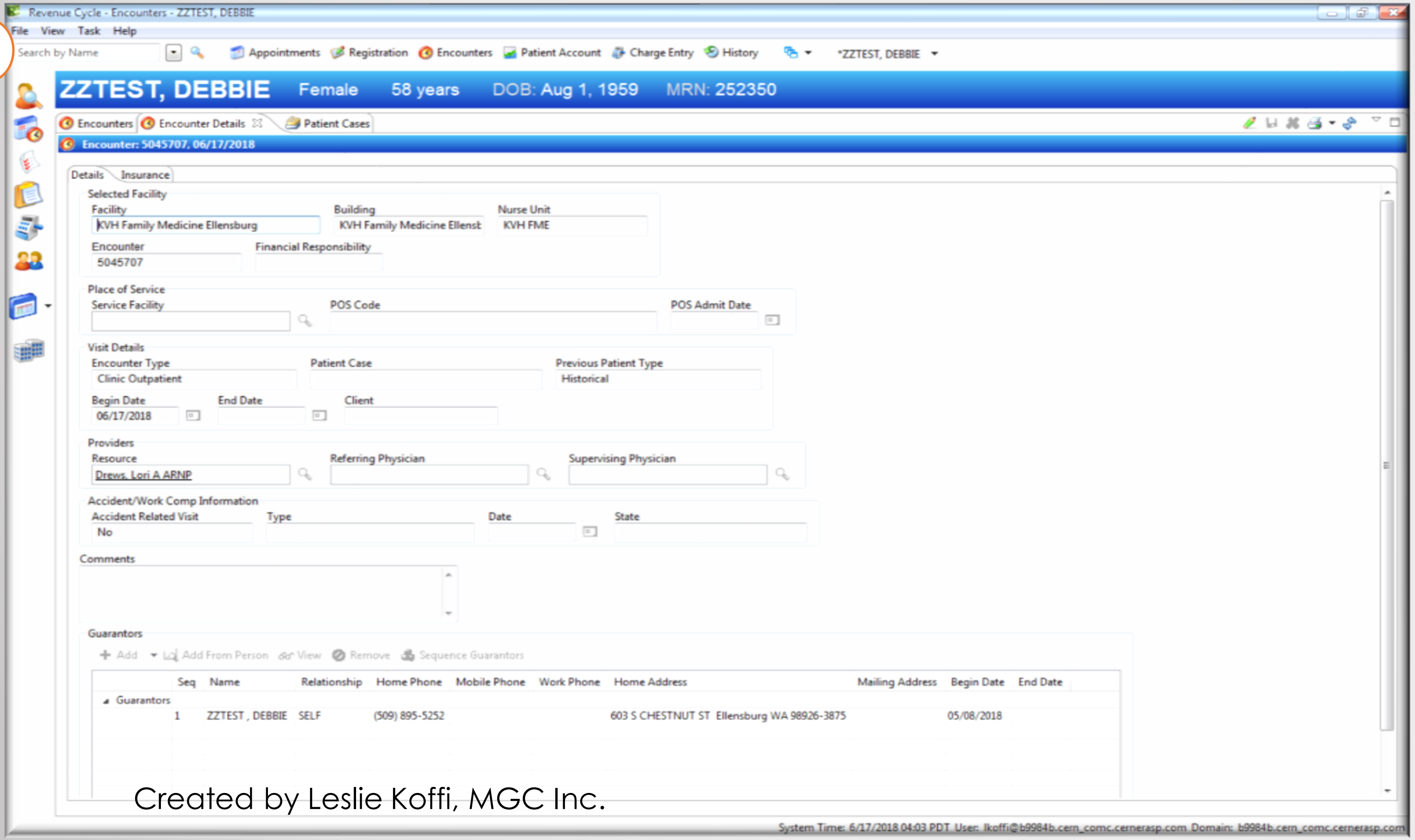

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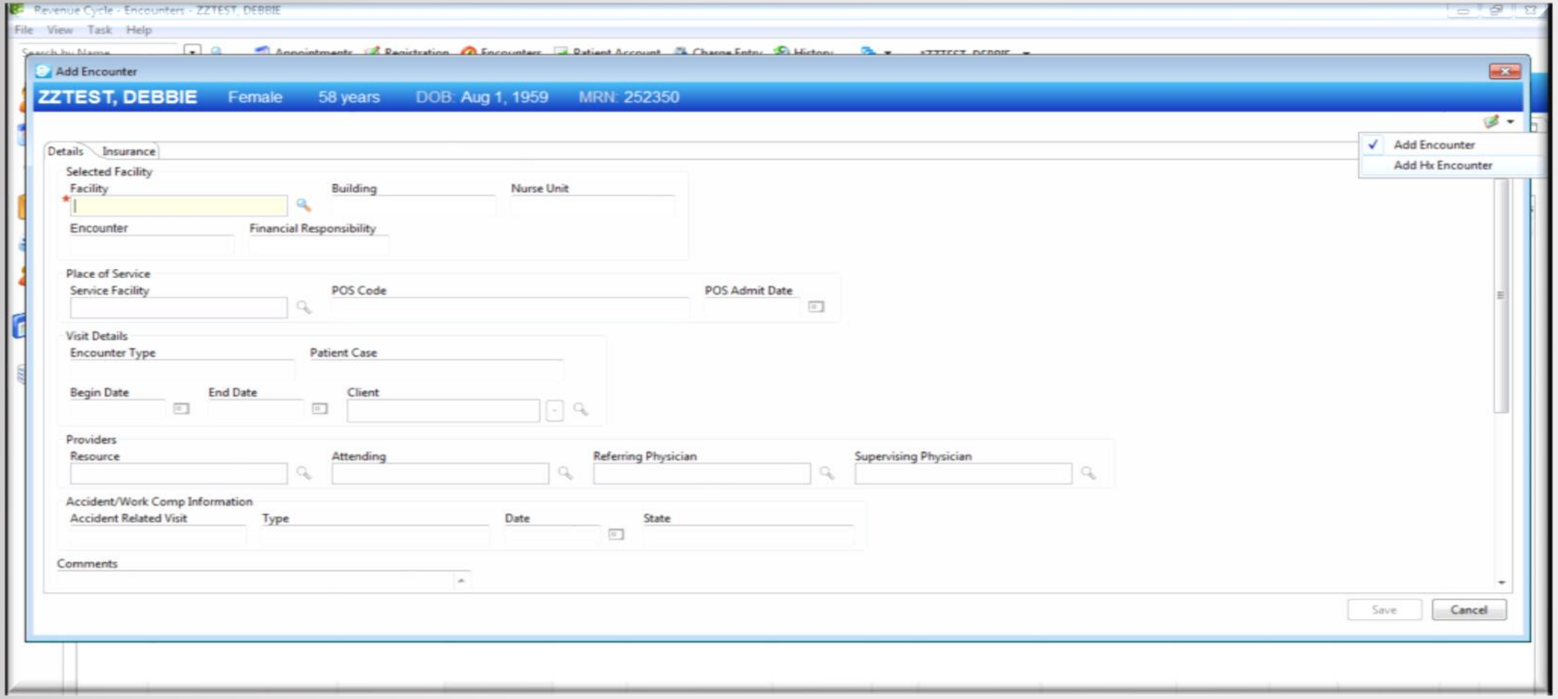
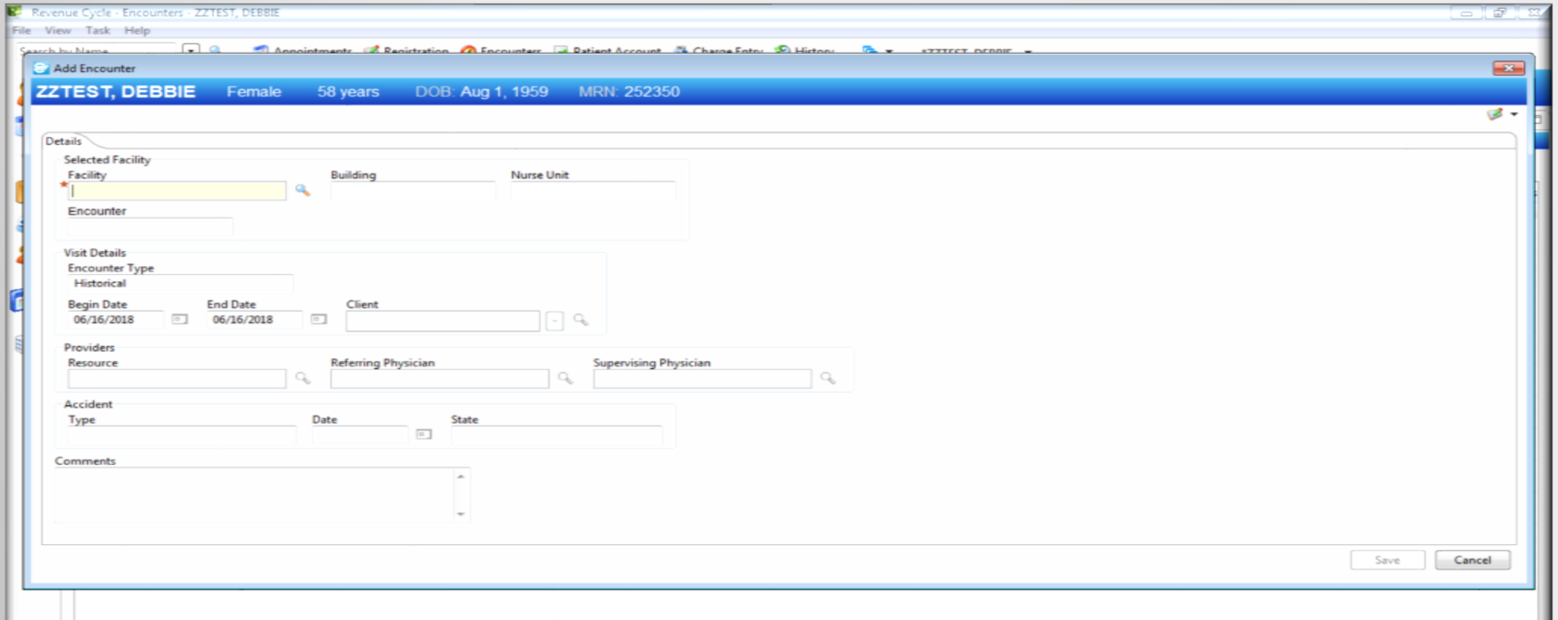
Encounter Perspective

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.





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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.

This concludes our CPM section.