Table of Contents

**Attachment Processing1**

**Billing2**

**Facility Notify4**

**Account List5**

**Manual Charges6**

**Setting Email Addresses6**

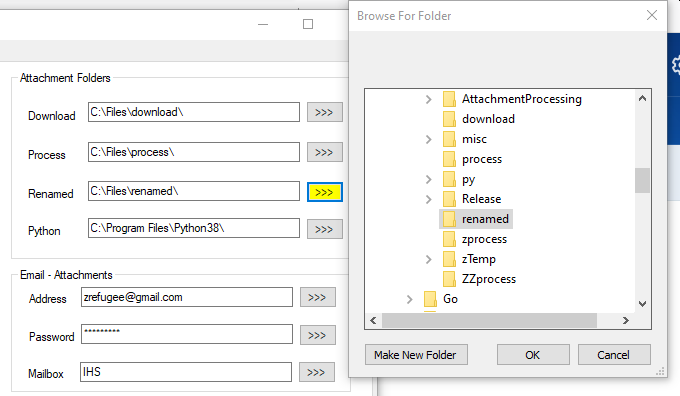
**Report Export by Facility8**

**Codes10**

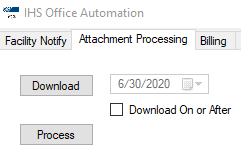
**Application Settings11**

**Attachment Processing**

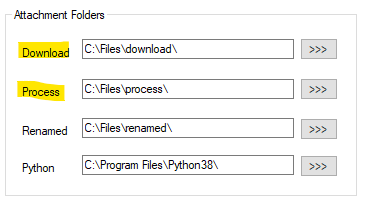
* Before bringing in any documents, go to the “Settings → Attachment Folders” tab and set the “Renamed” folder for the final location of the processed PDF documents.



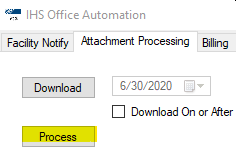
* Go to the “Attachment Processing” tab and set the date where any documents in the designated “Mailbox” (folder) on the date before and after the one set will be downloaded. Then click the “Download” button.



* After all the documents have been downloaded to “Settings -> Attachment Folders -> Download”, move all the files to “Settings → Attachment Folders -> Process”



* After moving the files, click the “Process” button in the “Attachment Processing” tab.



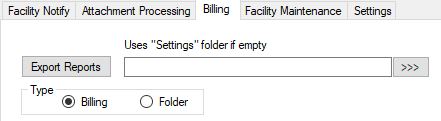
* After processing the files will be in the renamed folder (Settings ->Local Folders->Renamed) in the format “facility.pdf”, eg: 1F99999999.pdf. If you see a file like “02072020095642\_1C99999999.pdf”, that means there was another file assigned to that facility account. On files like “INVALID1.pdf”, it means the program was not able to read the facility code and you need to rename it manually.

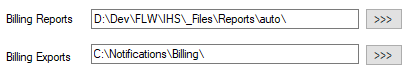
**Billing**

* It’s probably best to run the “Attachment Processing” functions first before going into the “Billing” tab since those documents will be needed to complete the billing process.
* For the reports to be assigned to a particular facility they need to have the facility group code set a prefix to the file name of the report. For example using“AIKEN(AI) CO DET CTR SC (SHP)”, the file name would something like “IHSBILLING\_AI.rpt since the group code is “AI”. If the report use CIPS wholesale database. The format would be like “IHSBILLING\_ZWS\_AI.rpt” using the identifier in “Settings/Wholesale ID.

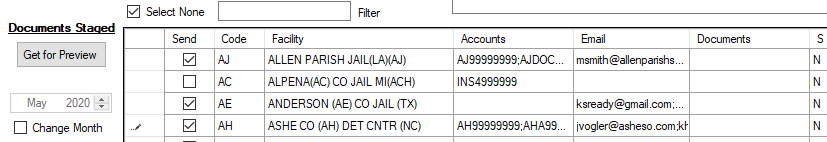


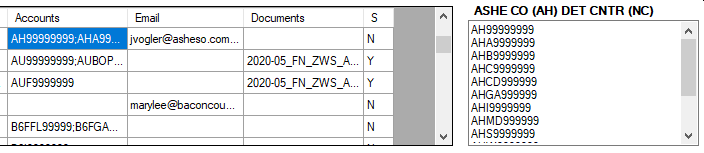
* The “Export Reports” function will run through the three main monthly billing reports if “Billing” is selected. If “Folder” is selected it run through the folder in “Settings -> Billing Reports” export them as PDF to “Settings -> Billing Exports”. If “Folder” is selected, the reports cannot have a parameter to be used.

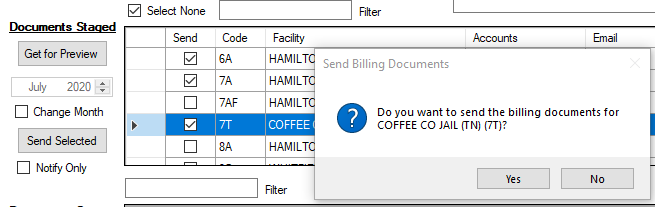




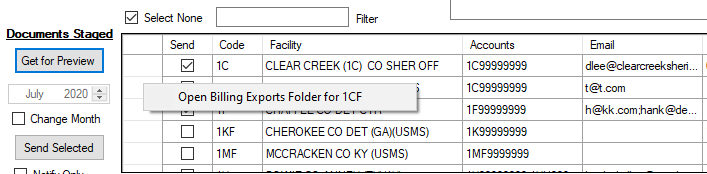
* The PDF documents created in the “Attachment Processing” process need to be copied to “Settings -> Billing Exports” folder before sending any emails to facilities but you can preview facilities in the “Documents Staged” grid before bringing the documents over.
* The “Get for Preview” button will load all facilities set up in database along account id numbers, assigned email addresses and documents for that facility in the “Settings -> Billing Exports” folder.



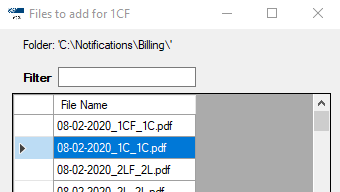
* All Accounts, Email addresses or Documents assigned to the facility can viewed by clicking on the cell
* The “Send Selected” button will send emails and documents for all facilities with the “Send” field checked or you double click on a row header to send a single facility. Check “Notify Only” to send emails without attachments.



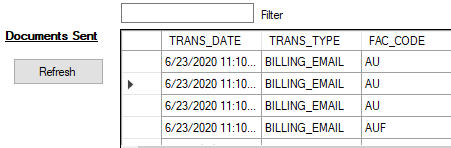
* To attach files that do not sync with a particular facility, right-click on the row header.



* A file dialog will pop up from the folder containing accounting statements and patient detail billing. Click on the row header to rename the file to make available to the facility for email export.

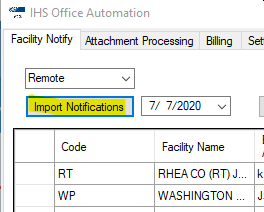


* In the “Documents Sent” grid you can view previously send emails by clicking the “Refresh” button.



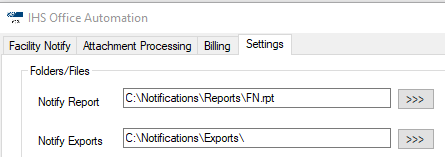
**Facility Notify**

* For ARX reminders, set the reminder date and click the “Import Notifications” button to load the calendar reminders, associated email addresses and fax numbers.



* Click the “Facility Export” button to create PDF files from the ARX report. If you want to view the documents before you send them they will located in the folder set in “Settings → Folders/Files → Notify Exports”. And the report used will be at “Settings → Folders/Files → Notify Report”.





* Click the “Send Email” button to send reminders to all associated email addresses for the facility.

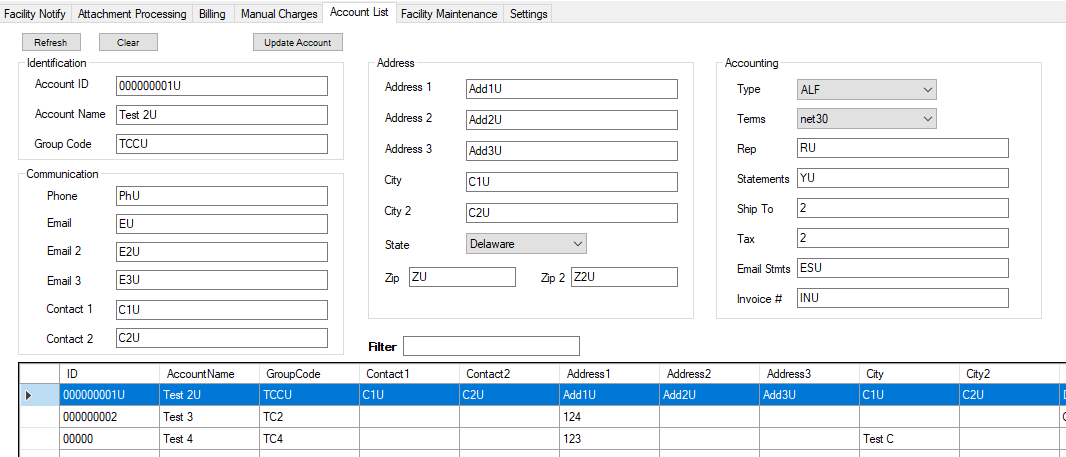


* Click the “Send Fax” button to send reminders by fax from the number assigned in CIPS.



**Account List**

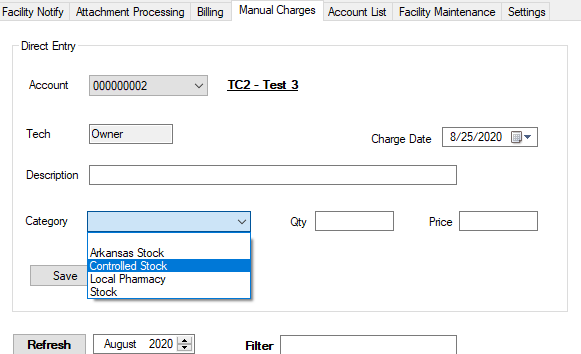
* This is area to set facility account billing addresses since the billing address may be different that one in CIPS.



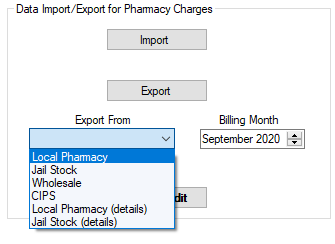
* The “Refresh” button will load existing accounts for editing. Click to the row header to load.

**Manual Charges**

* Manual charge entry for technicians



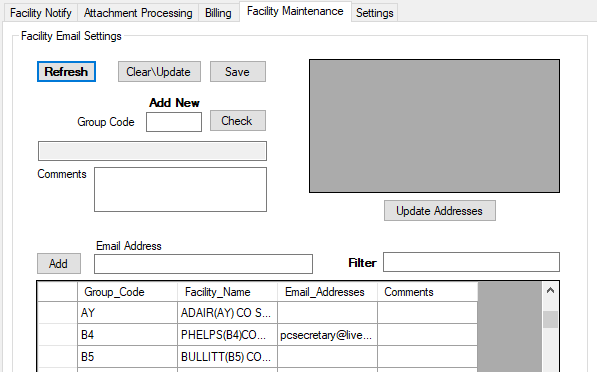
* Import for manual charges and export for all accounting charges.



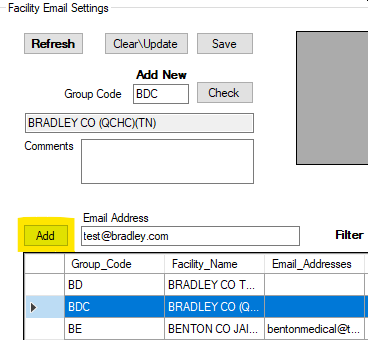
The “Bulk Edit” button you allows to remove multiple items at once.

**Setting Email Addresses**

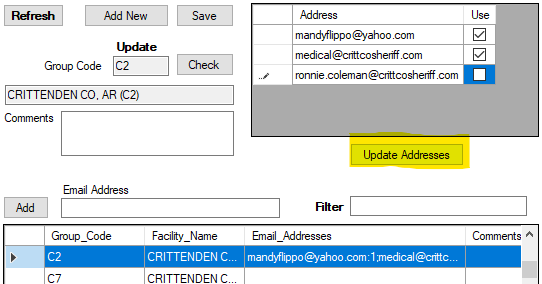
* Email addresses can be setup in the “Facility Maintenance” tab. The “Refresh” loads facilities to be managed.



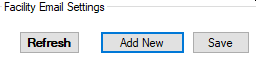
* To add an email address to a facility, click the row header to load the facility and after typing or pasting the address in, click the “Add Button”



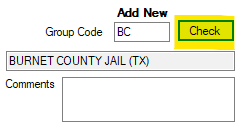
* To modify an email address for a facility, click the row header and all the addresses associated with that facility will be displayed. Check or uncheck the “Use” box by the address if it needs to be used or not. Click the “Update Addresses” button to save.

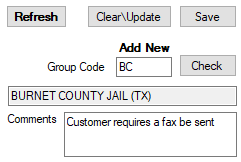


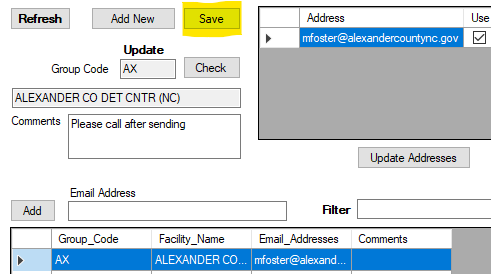
* Click the “Add New” button to add a new facility in



* The “Check” button will show if a facility is setup in CIPS.



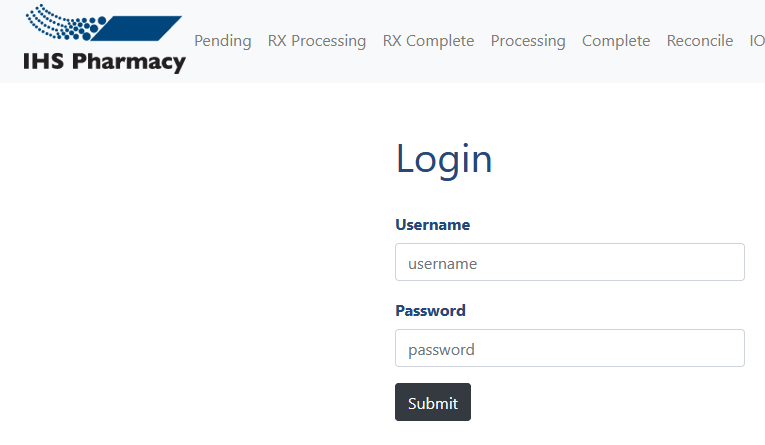
* Comments can added as well and then hit the “Save” button.
* Comments can be added to an existing facility as well.



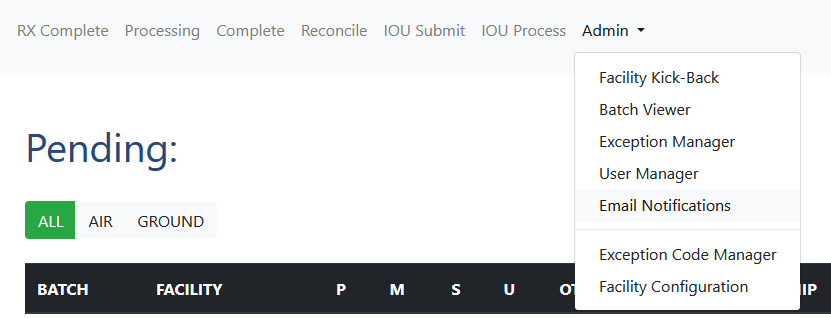
* At the bottom of “Facility Email Settings” you can set the body and subject of emails.



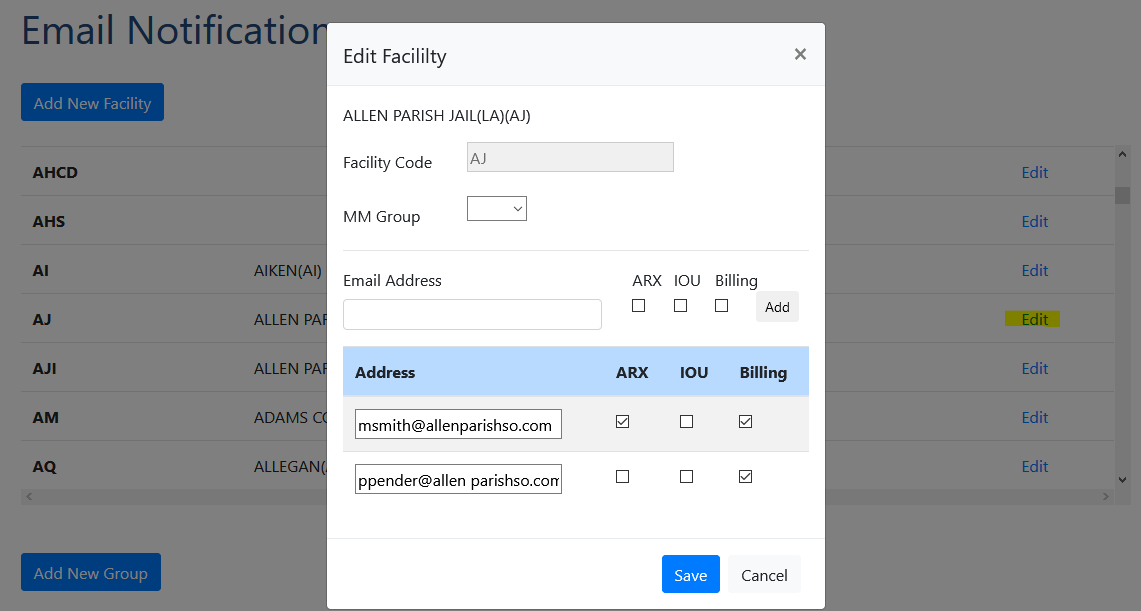
* Another way to maintain email addresses is to Go to <http://192.168.2.6:8001/login>



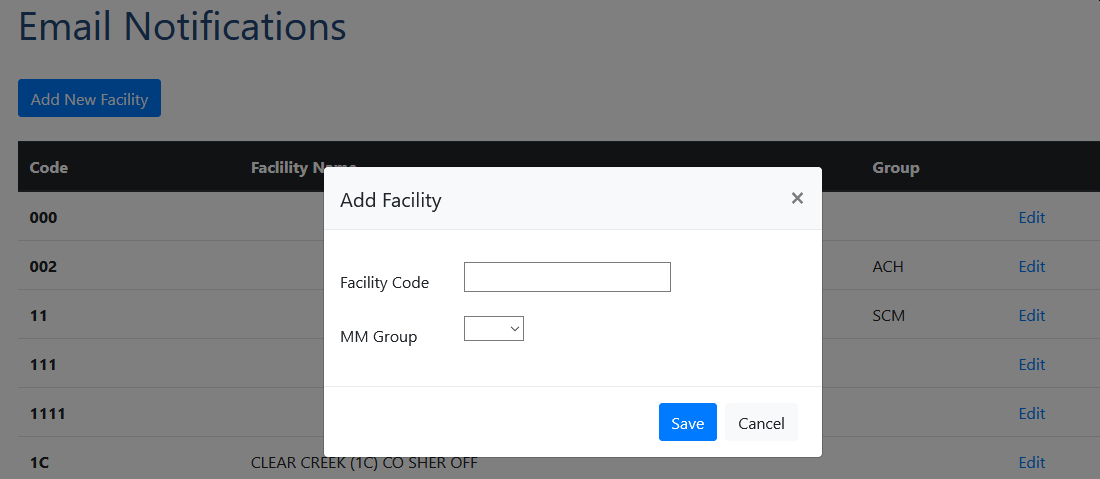
* Go to “Admin → Email Notifications”.



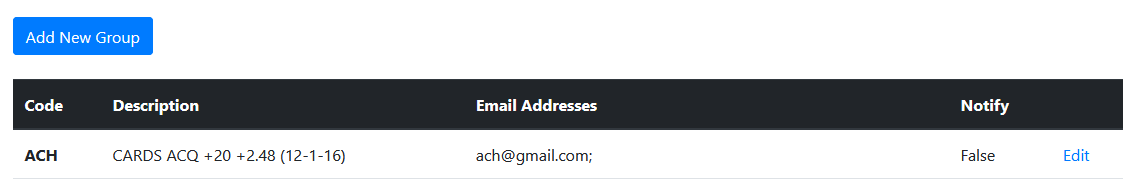
* Find the facility to add or edit an email address. An easy way to find the facility is to hold down Control and hit the letter “F”. This pop up a box to search the page. After you find the facility, click “Edit” to bring up the add/edit dialog.



* After typing a new email address and selecting where it is used, click the “Add” button.
* After editing an existing email address, click “Save”.
* If the facility is not in the database click the “Add New Facility” and type in the facility group code. After it is created, you can start adding email addresses.

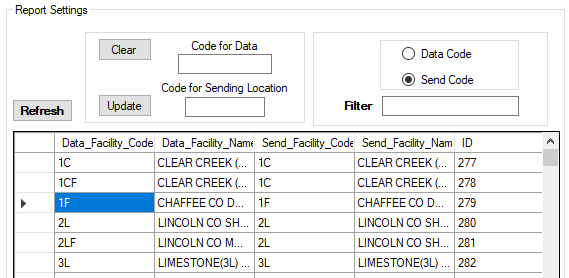


* Medical Management Groups can be assigned as well when adding a facility.
* Medical Management Groups can added and updated for IOU email notifications below the facility section

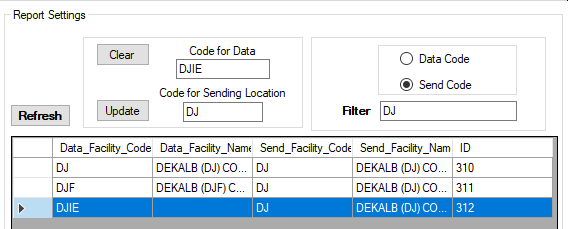


**Report Exports by Facility**

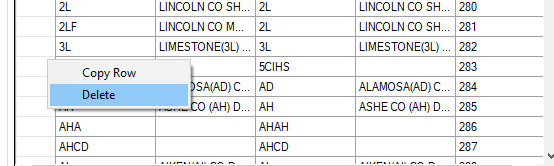
* “Facility Maintenance/Report Setting” is where the report exports by facility are setup. “Code for Data” is the group code that billing information is needed for. “Code for Sending Location” is the location the report will be send to.



* Click on the row header to edit a Data Group/Send Group combination.

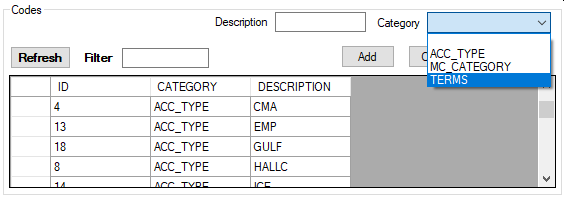


* Right click on a row header to copy or delete it.

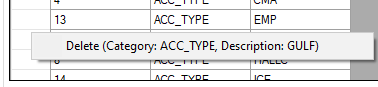


**Codes**

* This is the area for maintaining the codes used the Account List and Manual charges.
* ACC\_ TYPE – Values for the “Type” drop down for Account List/Accounting.
* MC\_CATEGORY – Categories used in Manual Charges.
* TERMS – Billing terms under Account List/Accounting



* You can delete a code by right clicking on a row header.



**Application Settings**

* All the items below are found under the “Settings” tab.

|  |  |
| --- | --- |
|  | -Location of report for ARX Reminders  - ARX PDF file export location, these files can be deleted  - Server location for ARX faxing  - Location for monthly billing reports  - Export location for PDF files that are emailed |

|  |  |
| --- | --- |
|  | - Folder statement files are downloaded to  - Move files to this folder for the renaming process  - Location for files after they have been renamed  - Python file for processing, see ‘IT’ to set up |

|  |  |
| --- | --- |
|  | - Email address and password to get accounting statements attachments  - Mailbox accounts where attachments are located |

* **Please get a person familiar with IHS database and email settings for anything below**

|  |  |
| --- | --- |
|  | - Address for SMTP to send emails  - Address/account password  - SMTP server  – SMTP port  - Forwarding address for ARX reminders |

|  |  |
| --- | --- |
|  | - Connection to the CIPS database  - Connection to the RxBackend database  - DSN connections for reports |

|  |  |
| --- | --- |
|  | - Document cropping size and screen resolution to increase efficiency of OCR reading |

|  |  |
| --- | --- |
|  | - Name of PC fax printer  - Google calendar ID for ARX reminders  - Identifier for CIPS Wholesale reports |