More Patient Actions

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Merge a Patient Account

CollaborateMD allows you to merge two duplicate patient accounts. The merge looks for identical Patient First and Last Name, DOB, SSN, Member ID, Home Phone, Addresses, and Zip Codes. Merging will transfe financial data, activity, notes, and appointments from the selected accounts to the currently opened patien account.

Who can use this feature?

Users with the Patient Merge permission.

1. Select **Patient** > **Patient**.
2. Use the **Search** field to search through your patients.

   All patients that are being merged must be in an "***Active***" status.

3. Select the **Patient**.
4. Click the **Merge** button found at the top of the page.
5. Select **Merge Patients**.
6. The Patient Merge window will show all patients with matching information.
7. **Check the box** next to the patients you want to merge.
8. Click **Merge**.

Undo Patient Merge

You must have the Patient Merge permission to undo a patient's account merge.

Undoing a merge will reactivate the merged patient account and transfer the applicable financial data, activity, notes, documents, and appointments from currently opened patient account to the original patien account.

1. Select **Patient** > **Patient**.
2. Use the **Search** field to search through your patients.
3. Select the **Patient**.
4. Click the **Merge** button found at the top of the page.
5. Select **Undo Merge.**
6. The Patient Merge window will show all patients currently merged.
7. **Check the box** next to the patients you want to unmerge.
8. Click **Undo Merge**.

Check for Duplicate Patients

This action is used to verify that the patient is not already entered into the system. The system will find other patients with the same **SSN** or patients with the **same last name and date of birth.**

> You can run the Patient Duplicates Report within the report viewer to find all patients that have a duplicate record.

Follow the steps below to check for duplicate patients.

1. Select **Patient** > **Patient**.
2. Use the **Search** field to search through your patients.

   > Place a check in the "***Include inactive patients***" box to include inactive patients in your search results.

3. Select the **Patient**.
4. Click the **More** button found at the top of the page.
5. Select **Check for Duplicate Patients**.
6. A Duplicate Patients window will open showing any possible duplicate patients.
7. **Place a check in the box** next to a patient and click **Open Patient**.

8. *Optional*: If needed use the **Merge** button to combine the duplicate patients and reference the Merge Patients Help Article to learn more.

Update Claims with Current Insurance

If you've made changes to a patient's insurance, use this action to quickly update any of this patients claim with their new or updated insurance.

1. Select **Patient** > **Patient**.
2. Use the **Search** field to search through your patients.

> Place a check in the "***Include inactive patients***" box to include inactive patients in your search results.

3. Select the **Patient**.
4. Click ⋮ More found at the top of the page.
5. Select **Update Claims w/ Current Insurance**.
6. Select how to update the claims.
    1. **Update policy information only (do not change payers)**: Use this option when the Payer has <u>not</u> changed but policy information such as the member ID has.
    2. **Set the current default payers and policy information**: Use this option when both the payer and or policy information has changed.
7. Use the Date of Service to select the date range for the claims you want to update.
8. Click **Update Claims** for a dialog window to appear showing the claims that will be updated. Some claims may be re-filed.
9. *Optional*: Place a check in the **Exclude** checkbox(es) for any claims that should not be updated with th current insurance information.

Claim #	Date of Service	Total Charges	Balance	Exclude
123456789	10/16/2019	$1,027.00	$1,027.00	☐

10. Click **Confirm and Save,** then click **Save.**

> ⚠ Claim re-filing will only be completed for charges that are currently in one of the following

statuses:

- **Send to Insurance via Clearinghouse**
- **User Print and Mail to Insurance**
- **At Insurance.** If the claim is currently in this status, the claim will be re-filed to the payer that the claim is currently at unless the payer is no longer associated with the claim at the time of service.

Jpdate Claims with an Archived Insurance

f you've made changes to a patient's insurance, use this action to quickly update any of this patients claim vith their new or updated insurance.

1. Select **Patient** > **Patient**.
2. Use the **Search** field to search through your patients.

   > Place a check in the "***Include inactive patients***" box to include inactive patients in your search results.

3. Select the **Patient**.
4. Click the Insurance Info tab.
5. Click the Insurance History button.
6. **Right-click** on the archived insurance you want to update and select**Update Existing Claims**.
7. Check the box to choose what payer to update claims for:
   1. **Update Claims where (Payer Chosen) is the primary payer**. Use this option if you want to updat claim(s) where the payer chosen from the insurance history is the primary payer.
   2. **Update Claims where a specific payer is the primary payer**. Use this option when you want to update claim(s) where a different payer is the primary payer.
8. Use the **Date of Service From/To** date to select the date range for the claims you want to update.
9. ***Optional***: Select the Practice and Provider you want to update the claims for.
10. Select what payer on the claim you want to update (Primary, Secondary, Tertiary).
11. Click **Update Claims** for a dialog window to appear showing the claims that will be updated. Some

claims may be re-filed.

12. *Optional*: Place a check in the **Exclude** checkbox(es) for any claims that should not be updated with th archived insurance information.

Claim #	Date of Service	Total Charges	Balance	Exclude
123456789	10/16/2019	$1,027.00	$1,027.00	☐

13. Click **Confirm and Save,** then click **Save.**

> ⚠ Claim re-filing will only be completed for charges that are currently in one of the following statuses:
>
> - **Send to Insurance via Clearinghouse**
> - **User Print and Mail to Insurance**
> - **At Insurance.** If the claim is currently in this status, the claim will be re-filed to the payer that the claim is currently at unless the payer is no longer associated with the claim at the time of service.

/iew All Appointments

Jse this action to see all of the past and future appointments for this patient. This action only works as lon ıas you are using the Appointment Scheduler in CollaborateMD.

1. Select **Patient** > **Patient.**

2. Use the **Search** field to search through your patients.

> Place a check in the ***"Include inactive patients"*** box to include inactive patients in your search results

3. Select the **Patient.**

4. Click **View All Appointments** found at the top of the page.

5. A list of all appointments for the patient is loaded.

> Click the Show Table button to display your results in a table format.

6. Click on the appointment and then **Edit** to edit the appointment.

View All Claims

Use this action to see all claims for this patient.

1. Select **Patient** > **Patient**.
2. Use the **Search** field to search through your patients.

> Place a check in the ***"Include inactive patients"*** box to include inactive patients in your search results.

3. Select the **Patient**.
4. Click the **More** button found at the top of the page.
5. Select **View All Claims**.
6. A list of all Claims for the patient is loaded.

Track Submission History

Use this action to track all claims sent for this patient.

1. Select **Patient** > **Patient**.
2. Use the **Search** field to search through your patients.

> Place a check in the "Include inactive patients " box to include inactive patients in your search results.

3. Select the **Patient**.
4. Click on the **More** button found at the top of the page.
5. Select **Track Claim Submission History**.

6. The claims will be opened in the Claim Tracker screen.

Create Professional Claim for Patient

Use this action to quickly create a professional claim for this patient.

1. Select **Patient** > **Patient**.
2. Use the **Search** field to search through your patients.

   > Place a check in the "***Include inactive patients***" box to include inactive patients in your search results.

3. Select the **Patient**.
4. Click the **More** button found at the top of the page.
5. Select **Create Professional Claim for Patient**
6. A newly created professional claim for this patient will open. Please reference the Claims Help Article for more information on creating claims.

Create Institutional Claim for Patient

Use this action to quickly create an institutional claim for this patient.

1. Select **Patient** > **Patient**.
2. Use the **Search** field to search through your patients.

   > Place a check in the "***Include inactive patients***" box to include inactive patients in your search results.

3. Select the **Patient**.
4. Click on the **More** button found at the top of the page.
5. Select **Create Institutional Claim for Patient**

6. A newly created institutional claim for this patient will open. Please reference the Claims Help Article for more information on creating claims.

Create an Appointment for a Patient

Use this action to quickly create an appointment for this patient.

1. Select **Patient** > **Patient**.
2. Use the **Search** field to search through your patients.

   > Place a check in the "***Include inactive patients***" box to include inactive patients in your search results.

3. Select the **Patient**.
4. Click the **More** button found at the top of the page.
5. Select **Create Appointment for Patient** and reference our Appointment Help Article for more information.

Post Payment for a Patient

Use this action to quickly post a payment for this patient.

1. Select **Patient** > **Patient**.
2. Use the **Search** field to search through your patients.

   > Place a check in the "***Include inactive patients***" box to include inactive patients in your search results.

3. Select the **Patient**.
4. Click the **More** button found at the top of the page.
5. Select **Post Payment for Patient** and reference the Payment Posting Help Article for more information.

Create a Payment Plan

Jse this action to quickly create a payment plan for this patient.

1. Select **Patient** > **Patient**.
2. Use the **Search** field to search through your patients.

> Place a check in the "***Include inactive patients***" box to include inactive patients in your search results.

3. Select the **Patient**.
4. Click the **More** button found at the top of the page.
5. Select **Create Payment Plan** and reference the Payment Plans Help Article for more information.

Open Manage Account

Jse this action to quickly open the manage account screen for this patient.

1. Select **Patient** > **Patient**.
2. Use the **Search** field to search through your patients.

> Pace a check in the "***Include inactive patients***" box to include inactive patients in your search results.

3. Select the **Patient**.
4. Click the **More** button at the top of the page.
5. Select **Open Manage Account** and reference the Manage Account Help Article for more information.

Create a Task for a patient

Use this action to quickly create a task for this patient.

1. Select **Patient** > **Patient**.
2. Use the **Search** field to search through your patients.

   Place a check in the "***Include inactive patients***" box to include inactive patients in your search results.

3. Select the **Patient**.
4. Click the **More** button at the top of the page.
5. Select **Create Task for Patient** and reference the Tasks Help Article for more information.