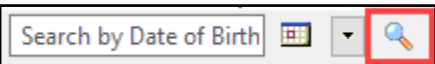
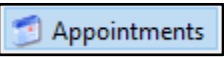
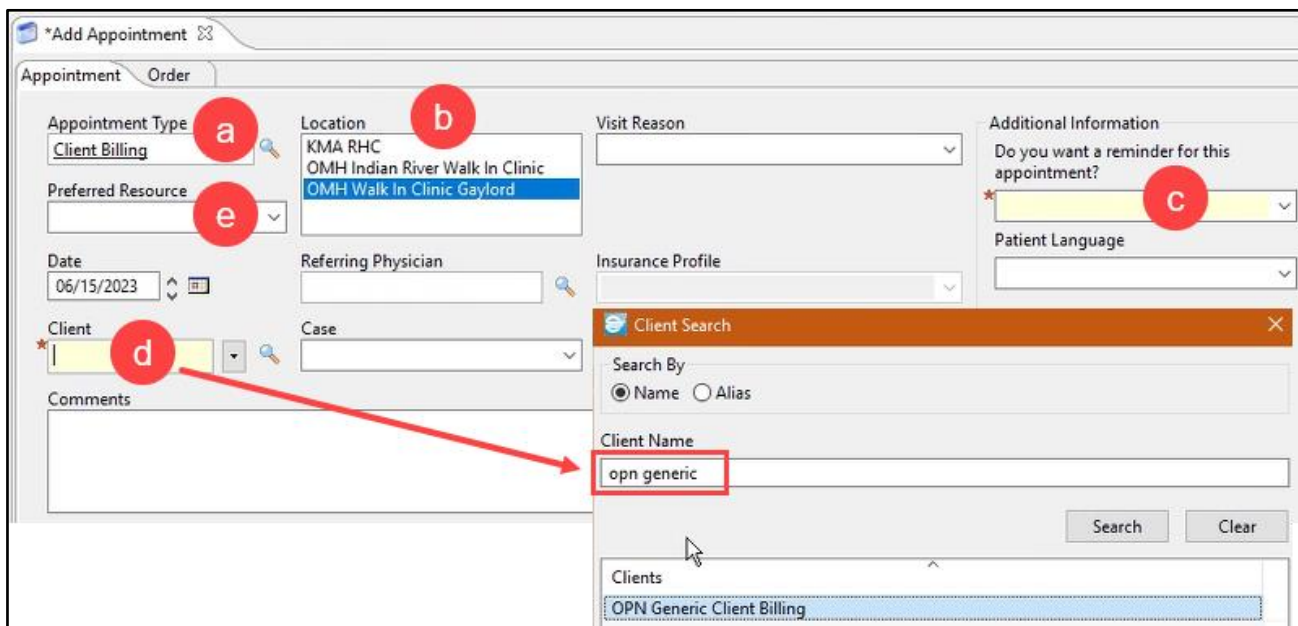


Generic Client Billing is used when a patient needs to be seen the same day at the request of their employer and the employer is a Client Billing Organization of the Otsego Provider Network (OPN), but the Organization is not built in the system. The clerical staff member must collect information about the Organization from the patient and call the Help Desk to request the Client Billing Organization to be built into the system. After the Client Billing Organization has been built, the clerical staff member will be notified. The clerical staff member must create a new encounter in the patient's chart with the correct Client Billing Organization and the encounter date as the date of service. The clerical staff member will email the MPI Group and request the two Client Billing encounters to be combined.

## Generic Client Billing Workflow

To use Generic Client Billing within Revenue Cycle:

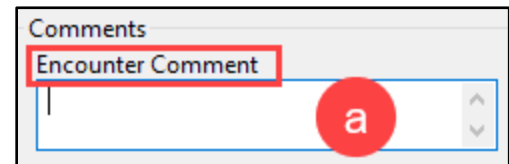
1. Search for the patient. 
2. Highlight the correct patient from the search list and click Select.
3. Select the **Appointments** perspective. 
4. In the **Add Appointment** section enter the appointment details:
  - a. **Appointment Type:** Client Billing.
  - b. **Location:** select the appropriate location.
  - c. **Additional Information:** select an appropriate response for a patient appointment reminder.
  - d. **Client:** search **opn generic**, then select **OPN Generic Client Billing** from the Clients list.
  - e. Preferred Resource: is not required but is available to narrow scheduling search options.



5. Schedule the patient for the appointment using **First Available** or **Schedule** options.
6. If appropriate for the scheduled appointment time, check-in the patient following the standard workflow.

**7** Modify Encounter: Modify Encounter - Client Billing

7. On the encounter level of check-in:
  - a. Add the Client Billing Organization details into the **Encounter Comment** field.
    - Official business name (**required**).
    - Street address (**required**, but if the patient doesn't know, the build team will look up).
    - Business phone number (**required**, but if the patient doesn't know, the build team will look up).
    - Business fax number (optional).
    - Business billing contact person (optional).
8. Complete the check-in workflow.



## Help Desk Work Ticket

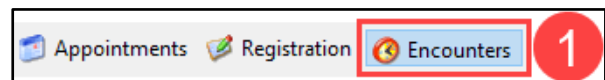
The clerical staff member **must** call the Help Desk to request that the Client Billing Organization be built into the system (may take 2-3 days).

1. Call the Help Desk at 231-935-6053 and provide the following information:
  - Munson Healthcare Clinic Name requesting the work ticket including a clinic contact name and number (the contact person will be notified when the Organization has been added).
  - Patient name, date of birth, and date of service.
  - Official business name (**required**).
  - Street address (**required**, but if the patient doesn't know, the build team will look it up).
  - Business phone number (**required**, but if the patient doesn't know, the build team will look it up).
  - Business fax number (optional).
  - Business billing contact person (optional).

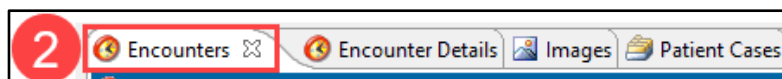
## New Client Billing Encounter Creation

When the Client Billing Organization has been built, the contact person provided in the request will be notified. The clerical staff member will need to create a new encounter in the patient's chart with the added Client Billing Organization and the **Begin Date** of the encounter as the date of service of the patient's appointment.

1. Within the patient's chart in Revenue Cycle, select the **Encounters** perspective.

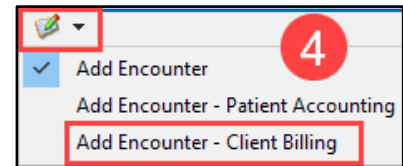


2. Select the **Encounters** tab.

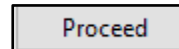


## Generic Client Billing for Clerical Staff

- Click on the **Add Encounter** icon.
- In the Add Encounter window, click on the Change Conversation down arrow and select **Add Encounter – Client Billing**.



- An Unsaved Changes alert box will pop up, click **Proceed**.



- Fill in the required encounter fields:
  - Client:** the correct Client Billing Organization.
  - Attending Physician:** the supervising physician.
  - Begin Date:** date of service of the patient's appointment.
- Click **Save**.

**a** Client Billing  
Client \*

Encounter Information  
Accident Related Visit      Onset Date  
Type      Date

Patient Case

**b** Physicians  
Attending Physician \*

▶ Referring Physician Miscellaneous Info

**c** Account Data  
Begin Date      End Date \*

### Email the MPI Group

After the new encounter has been created in the patient's chart, the clerical staff member will email the MPI Group with the two Client Billing encounter numbers to be combined.

- While in the patient's chart in Revenue Cycle in the Encounters perspective, click on the Encounters tab.
- The encounter numbers for the Generic Client Billing encounter and the new Client Billing encounter are in the **Encounter** column.
- Email the MPI Group in Microsoft Outlook at [MPIGroup@mhc.net](mailto:MPIGroup@mhc.net).
  - Include the following information in the email: the two encounter numbers, patient name, patient's date of birth, and the request to combine the encounters.

