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# Revenue Cycle Overview for all Healthcare Team Members

Cerner Revenue Cycle Ambulatory EDUCATION

APPS

Revenue Cycle

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HOME

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Revenue Cycle Cerner Practice Management is used by ambulatory practices for patient registration, scheduling, check in, and referral management.

Oitrix Workspace

citrix StoreFront

## How to Access Revenue Cycle

- 1. Navigate to the Citrix Workspace and locate Cerner Revenue Cycle from either APPS or HOME.
  - a. **APPS** displays all applications available.
  - b. **HOME** displays only favorited applications.
  - c. Click the magnifying glass to search for an application.
  - d. Click on the star icon to favorite an application. Favorited applications display with a gold star.
- 2. Click on Revenue Cycle to open.

## **Revenue Cycle Toolbar**

### File:

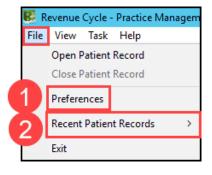
- 1. Preferences:
  - a. Preferences is used to set individual preferences for each healthcare team member's experience, including location settings.
  - Clicking on Preferences launches a separate window. Update preferences as needed and click Apply or Apply and Close to save changes.
- 2. Recent Patient Records
  - a. Displays the last five patient names that have been opened in Revenue Cycle.
  - b. Hover over Recent Patient Records to display the patient names.

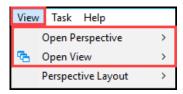
### View:

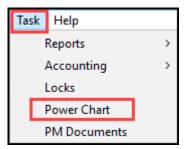
- 1. View is a Revenue Cycle navigation tool.
  - a. Open Perspective allows opening of both non-patient perspectives and patient perspectives.
  - b. Open View displays options to open view tabs that are non-patient related or patient related if a patient's chart is open.

### Task:

- 1. Access additional Revenue Cycle options including Scheduling Reports.
- 2. Click on PowerChart to open PowerChart. If a patient's chart is open, clicking on PowerChart will directly open the patient's chart in PowerChart.









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### **Opening and Closing a Patient's Chart**

### **Opening a patient's chart:**

- 1. Search for a patient using the Patient Search bar.
  - a. Change the Search by terms by clicking on the drop-down arrow.
- 2. Enter the search criteria into the Patient Search bar and click the magnifying glass to search.
- 3. Enter additional patient identifiers to narrow the search results and verify the correct patient.
  - a. Use three patient identifiers when searching for a patient before registering a new patient to make sure they are not already in the system.
  - b. The Search Quality indicates the accuracy of the search results based on the number of patient identifiers entered.
  - c. Click the Search button to re-run the search after entering information.
- 4. Open the patient's chart by selecting the correct patient and clicking the Select button.

		Reve	enue Cycle - Practice Ma	anag
	Fil	e V	'iew Task Help	2
1		Sea	rch by Name	- 🔍
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			Encounter	
			Claim	
			Statement	
			Guarantor Name	
			Health Card Number	
			Phone Number	

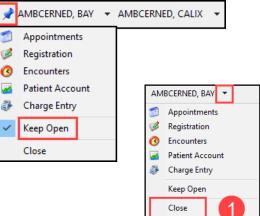
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First Name		Name		Date of Birth	Sex	Age	MRN	CMRN	SSN	Deceased
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Encounter Identifiers										
Birth Date	]									
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Any Phone Number		Encounter	Facility		1	Encounter	Type D	ate of Servio	e	Resource
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Search	Clear	AT0056128015	Munson Fa	amily Practice C	Center	InBetween	Visits 0	9/28/2022 12	2:00 AM	Lambert D
Search Quality	b									

#### Pinning a patient's chart open:

1. Click on the arrow next to the patient's name on the patient perspective toolbar and select Keep Open to pin the patient's chart open on the toolbar.

### Closing a patient's chart:

1. Click on the arrow next to the patient's name on the patient perspective toolbar and select Close.





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## **Non-Patient Perspectives**

The non-patient perspectives are icons located on the left side of the application.

Patient Tracking

- Filters:
  - 1. Scheduled appointments display based on the filters selected.
  - 2. The date displayed can be changed by clicking the back or forward arrows to move to the previous or next day, or by clicking on the calendar icon and selecting a specific date.
  - 3. Navigate back to the current date by clicking the diamond.
  - 4. The timeframe displayed can be set to All Day, Next 2 Hours, or Next 4 Hours.
  - 5. The Location can be changed by clicking on the Patient Tracking Filter icon.

& Patient Tracking × 2 psk Dashb	oard 🐼 Patient Arr 👍	0	Ŷ	3	Ċ	000
••• 04 / 15 / 2024 🖨	All Day Next 2 Hours Next 4 Hours	Location Group / Location: Appointment State: Munson Family Practice Center / All States	5			Resour
(MM/DD/YYYY)						

- Navigation
  - 1. The Patient Tracking Perspective shows specific appointment details face up.
  - 2. Open a patient's chart directly from the Patient Tracking Perspective by clicking on the patient's name.
  - 3. An i icon indicates an alert has been added for the patient. Click the i to display the alert.
  - 4. The Status column is used to initiate the manual check-in or complete the check-in process for a patient who completed e-registration.
  - 5. To view additional appointment details, click on Show within the desired patient's appointment row.
  - 6. Registration information can be reviewed in the expanded view. Items with a red x indicate items to be reviewed. These items are addressed during the check-in process.
  - 7. The areas indicated may be accessed by clicking on the blue hyperlink text.

Appointment Time	Patient	2	Statu	s 🚺	Encou	nter	Appoint	ment Type	Reason	Resource	Location	Authorization	n Insurance	Payment In
07:00 AM	AMBCERNED, B MRN: AT41730 Age: 75 years	11		itment:	AT0056: 54	1280	FP Establi	shed Patient	Hypertens on	i Lambert DO, Timothy	Munson Family Practice Center (15 min)		Medicare Plus Blue	Due Today: Paid Today: Charges: (-)
		Dem	ograp	hics		De	etails			Insurance	2		Financial	
-		Date Of I	Birth:	10/10/1948		Prima		AMBCERNED,	BARBARA	Payer:	Blue Cross			\$0.00
		Home		1105 SIXTH ST		Guara					-		alance:	
		Address:		TRAVERSE CITY 49684-2345	MI	Encou Numb		AT0056128054	ł	Start Date:	Sep 22, 20 AM		nsurance alance:	\$0.00
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AMBCERNED, BARBAR	۵	Employer	r:			Date:		AM		Member	111111111	1111		
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× Address Validation	× Eligibility	✓ POS Ba	lance a	nd Payments	Images									
Hide ^ 6	0													



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- 1. Resource View is available to view the schedule for a provider, room, or resource group.
- 2. Resource View offers a view of one or more resource.
- 3. Search for a resource using the search bar and magnifying glass.
- 4. Use the calendars to navigate to a different date. 👩 Multi Day View 👩 Availability View 👩 Resource Schedule Resource View  $\, imes \,$ 5. The Recent and Search Recent Favorites Favorites tabs are Monday, April 15, 2024 ~ available. Klee MD, I 6. Multi Day View displays 7:00 AM AMBCERNORIENT, AIDEN four days at a time for the resource selected. Navigate to another date range by clicking April 2024 Þ the date on the calendar Sun Mon Tue Wed Thu Fri Sat 8:00 AM or using the back or 31 4 5 6 1 2 3 8 9 10 11 12 13 forward arrows. 17 14 15 16 19 20 18 24 21 22 23 25 26 27 28 29 30 Queues 6 5 🎙 Reschedule Requests 🛛 🛛 🎌 Standby Appointment Requests 🧟 Appointment Requests 皆 Eligibility 🊨 Consumer Demographic Updates Work Queues Requests **?** 8 Begin Date End Date Recent Viewed

MFPC Family Practice Reschedule

- 1. Queues are clinic worklists to work from.
- 2. Navigate to each queue by clicking on the tab.
- 3. Reschedule Requests Queue:

04/15/2024 👌 🛄 05/15/2024 👌 🛄

a. Provides a worklist of patient appointments that need to be rescheduled, which may occur when a resource schedule is blocked and scheduled appointments are canceled.

Display

Filters: Lambert DO, Timothy

b. Once the new appointment is scheduled, the patient will drop from this work queue list.

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c. Set the Recent Viewed Queue to display the queue for the desired location by searching and selecting the correct location or locations. This must be done for each Queue individually.

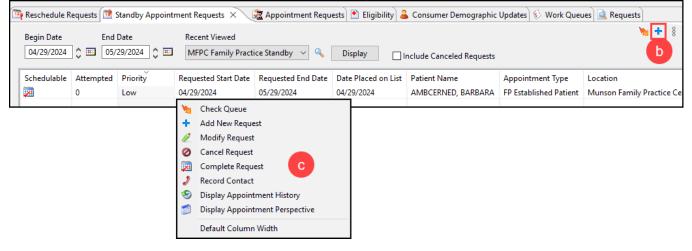
🕮 Reschedule Requests 🗙 🍱 Standby Ap	pointment Requests 🔯 Appointment Requests 🖆	Eligibility 🚨 Consumer Demogri
Begin Date End Date	Recent Viewed	С
04/28/2024 🗘 🎫 05/29/2024 🗘 🎫	MFPC Family Practice Reschedule	V 🔍 Display
Standby Attempted Date Time Reque	ested Date Requested Time Duration Patient	Resource Location Appointme

- 4. Standby Appointment Requests Queue:
  - a. Functions as a waiting list for patients requesting to be seen sooner than their current scheduled appointment.

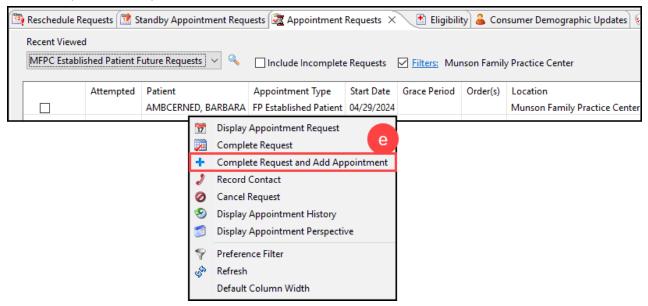


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- b. This worklist may be used to fill open appointment slots. Patients can be manually added to this queue by clicking the blue Add icon. The patient must have a future appointment scheduled before adding a standby appointment request.
- c. Right-click on an individual request to select Complete Request or access more options.



- 5. Appointment Requests Queue:
  - a. Worklist of patient appointments needing to be scheduled. Appointment requests are generated when a return to clinic order is placed by a provider or clinical health care team member.
  - b. A manual appointment request can also be made from Add Appointment Plus.
  - c. Appointments scheduled correctly from this queue will cause the patient name to drop from this work queue list.
  - d. Right-click on the patient's name to view action options.
  - e. Complete Request and Add Appointment will allow scheduling of the requested appointment and completes the request.





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6. The Work Queues tab will only be visible if there are other queues assigned to an individual. Click on the queue from the list on the left to view each individual worklist.



## My Workflow

- 1. Available to view Reports, Charge Batches, and Refunds.
- 2. The Registration Edit Failure Queue is found here, which contains any registration or insurance errors found by the billing and coding team that need to be reviewed and corrected by the practice staff.



- 1. The Referrals Perspective opens Referral Management. Referral management is used by all Munson Cerner ambulatory practices and offers a seamless workflow to manage incoming and outgoing referrals.
- 2. The Referral Management tab contains Worklists that are created and used by referral managers to process referrals.
- 3. The Patient-Centric Referrals tab within Referral Management is available for all healthcare team members to search for and view referral information for a single patient.
- For detailed information regarding Referral Management, refer to the Referral Management education resources on the <u>Clinical EHR Education</u> <u>website</u>.

## Charge Batch Entry and the Create Remittance

perspective are billing tools.



1. An Account Search tool available to search for Client, Business, Research, and Guarantor.

🔯 Referral Management 🗦	×					
2 Referral Management	×	Patient-Cen	tric Ref	errals >	<	+
Worklist MFP Originating:	To Send	<b>~</b> (	<i>ب</i>	.ist Maintena	nce	
Patient BAU Receiving: A BAU Receiving: C		rs		1	Insura	nce
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BAU Receiving: F *AMB MFP Originating: DOB: J/ MFP Originating:	Complete Monitoring			1	Medica	are Plus Blue
MFP Originating: *AMB MFP Originating:				1	Medica	are Plus Blue
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Client Business Research Organization	Guarantor				ite La	
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Account Search     Client Business Research      Organization     Account Number     Patient Last Name	Guarantor				te La	
Account Search     Client Business Research     Organization     Account Number     Patient Last Name     Patient First Name	Guarantor				te La	
	Guarantor				te La	



Record Contact For Appointment Display Appointment History Elisplay Patient Arrival

Add Standby Appointment Request

Print Charge Ticket

Print Patient Itinerary

Preferences Default Column Width

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# Revenue Cycle Overview for all Healthcare Team Members

Appointments

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## **Patient Perspectives**

Patient Perspectives are located at the top of the screen and are viewable with a patient chart open.

Search by Name	• ٩	🧾 Appointments	🧭 Registration	O Encounters	😼 Patient Account	🐉 Charge Entry	~ 5	AMBCERNED, BARBARA 🔻
🚨 АМВС	ERNE	D, BARBA	ARA	Female	75 years	DOB: 10/1	0/1948	MRN: AT417301

### **Appointments**

The Appointments Perspective contains the selected patient's appointment information. Navigate by clicking on each tab

tub.	🔞 Future Appointm 🛛 🚺 Past App	intmen 🛛 🎊 Standby Requests 🛛 🗞 App	ointment Req 🎒 Patient Cases 🚮 🤇	Guided Schedulin
1. Future Appointments:	Past Cancellations by Patient: 1	Past No Shows: 0	Standby Requests: 1	
	🛕 🎬 遇 Date 🏠 Tim	Duration Resource	Location Ap	pointment Type
	A Mon Apr 29, 2024 05:1	PM 15 min Lambert DO, Timothy	Munson Family Practice Center FP	Established Patient
	future appointments base		<ul> <li>Modify Appointment</li> <li>Modify Appointment T</li> </ul>	
-	ing on the Filters text with ands for direct book.	a nyperiink.	<ul> <li>Reschedule Appointme</li> <li>Cancel Appointment</li> </ul>	ent
c. Right-click on an ap	pointment to access Action	options.	🗳 Check Medical Necess	ity

c. Right-click on an appointment to access Action options.

### 2. Past Appointments:

- a. Displays past appointments, including cancelled appointments and no-show appointments.
- b. Select Filters to change the displayed appointments.

	🔞 Fu	iture Ap	poin	2 🗟 <u>Pa</u>	ist Appointr	nents ×	1 Standby Reques	ts 🚮 Appoin	tment F	lequests 🎒	Patient Cases 🚮	Guided Schedulin	g
b	⊡ Fi						nter   Appointment St Appointment Type		State	Encounter	Insurance Profile	Authorizations	Case

### 3. Standby Requests:

- a. Shows patient specific standby requests.
- b. Add a new standby request for the patient by clicking the blue Add icon.

	Future App Date Range Begin Date 04/29/2024	End Da		3	Appointment Req	🎒 Patient Cases 🚮 (	Guided Schedulin
a	Attempted	Priority	Requested Start Date	Requested End Date	Date Placed on List	Appointment Type	Location
	0	Low	04/29/2024	05/29/2024	04/29/2024	FP Established Patient	Munson Family Pract



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- 4. Appointment Requests:
  - a. Displays individual patient appointment requests until scheduled from the Appointment Request Queue.
  - b. Select Filters as needed.

6	Future Appoir	ntm 🔞 Past App 🛛 b	n 🔃 Star	ndby Requests	🔞 Appoin	tment Req 🗙 🍠 Patient Ca	ses 🚮 Guided Schedulin 📃 🗖
	🗌 Include Car	nceled Requests 🔽 🖪	<u>lters:</u> <no fi<="" td=""><td>ilters Selected&gt;</td><td></td><td>4</td><td></td></no>	ilters Selected>		4	
	a	Appointment Type	Start Date	Grace Period	Order(s)	Location	Request List
		FP Established Patient	04/29/2024			Munson Family Practice Center	MFPC Family Practice Future Re

5. Additional tabs may or may not be viewable, depending on the position.

### **Add Appointment Plus:**

Registration

- Add Appointment Plus is located on the bottom half of the screen within the Appointments perspective and is used for scheduling new appointments.
- For detailed information, refer to the Appointment Scheduling educational resources on the <u>Clinical EHR Education</u> <u>website</u>.

Enter Information	* Required fields marked with an asterisk		Appointments
* Add Appointment by:	03101137	î	
Appointment Type -			
* Step 1: Add Appointment Type			
Search Appointment Types	Q		
Select an appointment type		-	

- 1. Click on the individual tabs to navigate to the desired area.
- 2. Demographics contains tabs for Patient, Relationships, Guarantor, Insurance, Legal Forms, and Alerts.
- 3. To modify information:

🥩 Registration

- a. Select the Change Conversation icon to choose what to modify.
- b. Select either Modify Full Registration or Modify Patient Demographics.
- c. Click the Modify pencil icon.
- d. Add or update information as needed.
- e. Click the Save icon.

Selected Facility       Primary Care Physician       No PCP Reason       SSN       No SSN Reason         MHC Munson Family Practice Center T       Imamber DO, Timothy R       Images       Patient refused         Legal Name       First Name       Middle Name       Suffix         Last Name       First Name       Middle Name       Suffix         Demographics       Demographics       Images       Images	emographics X 🛛 🖓 Images 🧐 Transact tient Relationships Guarantor Insurance I	tion History Viewer 🥪 Guarantor Balai	nce Summary 🎒 Patient Cases	3	Modify Ful	□ II Registration tient Demogra
Last Name First Name Middle Name Suffix AMBCERNED BARBARA Preferred First Name Demographics Images	Facility MHC Munson Family Practice Center 1				No SSN Reason	
Images	Last Name AMBCERNED		Middle Name	Suffix		
Images	 Demographics	L				
insurance or identification cards.	a. View images of s		lmages			



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### Encounters

O Encounters

Encounters is a list of all patient encounters. The list may be sorted by clicking on the column headers.
 a. A new encounter is created by clicking the blue Add icon.

		,	0					
) Encounters 🗙 🕜 Encounter Details) 📓 Images 🎒 Patient Cases								a 🔸 🖻 🦑
🙆 Encounter: AT0056128054, 10/10/2022 7:00 AM								
Filters								
Encounter	Facility	Encounter Type	Pagin Date	End Data	Resource	Guarantor	Client	Primary Health Plan
Encounter	raciiity	Encounter Type	begin bate	End Date	Resource	Guarantor	Client	Primary Fleatin Plan
AT0056128054	Munson Family Practice Center	Clinic	10/10/2022 7:00 AM		Lambert DO, Timothy R	AMBCERNED, BARBARA		Medicare Plus Blue
AT0056128014	Munson Family Practice Center	InBetween Visits	09/28/2022 12:00 AM		Lambert DO, Timothy R	AMBCERNED, BARBARA		

- 2. Encounter Details contains details for the selected encounter.
  - a. Double clicking on an Encounter opens the Encounter Details.
  - b. To modify Encounter Details:
    - i. Select the Change Conversation icon to choose what to modify.
    - ii. Select the correct Modify Encounter conversation.
    - iii. Click the Modify pencil icon.

🔇 Encounters 🔇 Encounter Details 🗙 📓 Images 🎒 Patient Cases 🛛 🛛 🚺 🖉 😼	
🔇 Encounter: AT0056128054, 10/10/2022 7:00 AM	✓ Modify Encounter
Details Guarantor Insurance	Modify Encounter - Patient Accounting
Modify Encounter	Modify Encounter - Client Billing
Location Details       Encounter Number       Facility       Building       Location         AT0056128054       Munson Family Practice Cen       Munson Family Practice Cen       Munson Family Practice Cen         Encounter Type       Confidentiality Level       Medical Service         Clinic       Routine	

- iv. Add or update information as needed.
- v. Click the Save icon.