



Monthly Software Update

July 2017



All New This Month

- Billing Filters Added and Updated
- Links to ERA list resources from Billing
- New Generic Insurance Log in Billing
- New Corrected Claims Button
- Supervision Report Updated
- Notes and Authorizations are Classified and can be Auto-Shared
- Notes allow only one user at a time
- New Filter on Notes Templates
- Share Private Library Template

New Filters on Billing

- Filtering by denial code, and unconverted mismatch, as well as improved overlapping filters, will help users find missing payments. Billing and Timesheet filters are now in left sidebar, which matches other pages, and provides improved mobile optimization for filtering.
- Read the Help Articles below for greater detail on these features

[Help Article on Find Missing Payments on Billing Screen](#)

[Help Article on Using in-converted match](#)

▼ Audits

Origin	From Appointment	Manual
Duplicates	Find Duplicates	
Overlap	By Provider	By Client
Un-Converted Match	Choose ▼	

- Client / Day
- Client / Day / Code
- Client / Day / Auth

Has Admin Note	Yes	No
Has Service Note	Yes	No

▼ Payments

Last Paid	Choose ▼		
Has Payment(s)	Yes	No	Custom
Type of Payment(s)	Choose ▼		
Has Copay Payment	Yes	No	
Has Copay or Copay Payment	Yes		

Adjustment Group Choose ▼

- CO - Contractual Obligations
- CR - Correction And Reversals
- OA - Other adjustments
- PI - Payor Initiated Reductions
- PR - Patient Responsibility

▼ Payments

Last Paid	1
Has Payment(s)	1 - Deductible amount
Type of Payment(s)	10 - The diagnosis is inconsistent with the patient's gender.
Has Copay Payment	100 - Payment made to patient/insured/responsible party.
Has Copay or Copay Payment	101 - Predetermination: anticipated payment upon completion of services or claim adjudication.

✖ Adjust Reason

Search

Link to Resource Files on ERA List from Billing

- New links have been added so you can now easily navigate to specific files available in the ERA list while on the Billing screen.

The screenshot displays the Billing screen interface. On the left, a table lists billing entries with columns for WORK, RATE, DRIVE, CHARGES, and AMOUNTS. A red arrow points from a file link in the table to a modal window on the right. The modal window shows file details for '437124600_ERA_STATUS_5010_20170708.zip' and includes a 'Download (25.03 KB)' button. Below the modal, there is a 'Document Management' section with fields for 'File Number' and 'Document Template'.

WORK	RATE	DRIVE	CHARGES	AMOUNTS										
Units	Billed	Agreed	Hrs	Rate	Mls	Rate	Billed	Agreed	Calc Adj	Copay	Adj	Paid	Owed	Options
1	40.00	26.29	0.00	0.00	0.0	0.00	40.00	26.29	13.71	2.60	0.00	23.43	2.86	

Reference: C171
Notes: Claim: 1741343 - Claim Pmnt: 180458 - Adj: PR - Patient Responsibility | 2 - Coinsurance amount | 2.60 - Notes: Updated the copay to \$2.60 3 files

Reference: C17
Notes: Claim: 1741343 - Claim Pmnt: 180458 - Notes: PR - Patient Responsibility | 2 - Coinsurance amount | 2.6, CO - Contractual Obligations | 45 - Charges exceed your contracted/ legislated fee arrangement | 13.97 3 files

VIEW OR DOWNLOAD

zip	437124600_ERA_S...	2.86	Add
835	437124600_ERA_...	2.86	
txt	437124600_ERA_S...	0.26	

437124600_ERA_STATUS_5010_20170708.zip

Download (25.03 KB)

System ID: 7653207
Added: Jul 09 2:10 am by
Description: This contains payment information for a claim.
 Medical Record

Document Management

File Number:

Document Template: Select a template...

New Generic Insurance Log in Billing

- Pull the info you want to track, including signatures, service codes and more, into a generic insurance log.
- Request this new insurance log from your Customer Success Lead or email careteam@centralreach.com
[Help Article](#)

Service Log

Reset

Save As

Print





Page 1 of 2

1. Consumer Name: Member id:
 (First) (Last)

2. Vendor Name: Subscriber id:

3. Authorization Start Date: 4. Authorization End Date:

5. For Services Provided: Month Year Payor:

Date	Location	Description of Service Provided	Service Code	Start Time	End Time	Provider	Provider Signature	Guardian	Signature of Parent or Legal Guardian
6/29/2017		Therapy 20-home	0361T	12:00 PM	12:30 PM	Diana's Therapy 1212121,2121,21 2,121,2212			
6/29/2017		Therapy 20-home	0361T	12:00 PM	12:30 PM	Diana's Therapy 1212121,2121,21 2,121,2212			
6/30/2017		Signature	0362	4:30 PM	5:00 PM	Diana's Therapy 1212121,2121,21 2,121,2212		Vuugb	

New Corrected Claim Button from ERA Screen

- Click a new button from the ERA screen to begin generating a replacement claim from the bulk merge screen.
- System will auto-set the submission reason to “7-replacement” so claim is not resubmitted as a duplicate

[Help Article](#)

← Claims 835 Details **Payments**

Payment ID	Payor	Check/EFT Number	Total Amount
3450	ANTHEM BLUE CR...	CHECK101	\$4527.5

Services Lines	Billing Labels	Client Payer	Payment Type
<input type="checkbox"/> Claim: 419 1 Actions ▾		<input type="button" value="Change Payor"/>	<input type="button" value="Change Payment Type"/>
<input checked="" type="checkbox"/>	1	ANTHEM BLUE...	Electronic
			Total:

Show/Hide Claim Info

CLAIM BULK ACTIONS

View All Billing Entries

Label All Billing Entries

Add New Task

Edit Notes

New corrected claim

Notes and Auths. can be Auto-Shared

- We have classified Notes and Authorizations as being a specific type of file, allowing Notes and Authorizations to be auto-shared at employee setup, or in connections, going forward.
- Read the Help Article below for greater detail this update.

[Help Article](#)

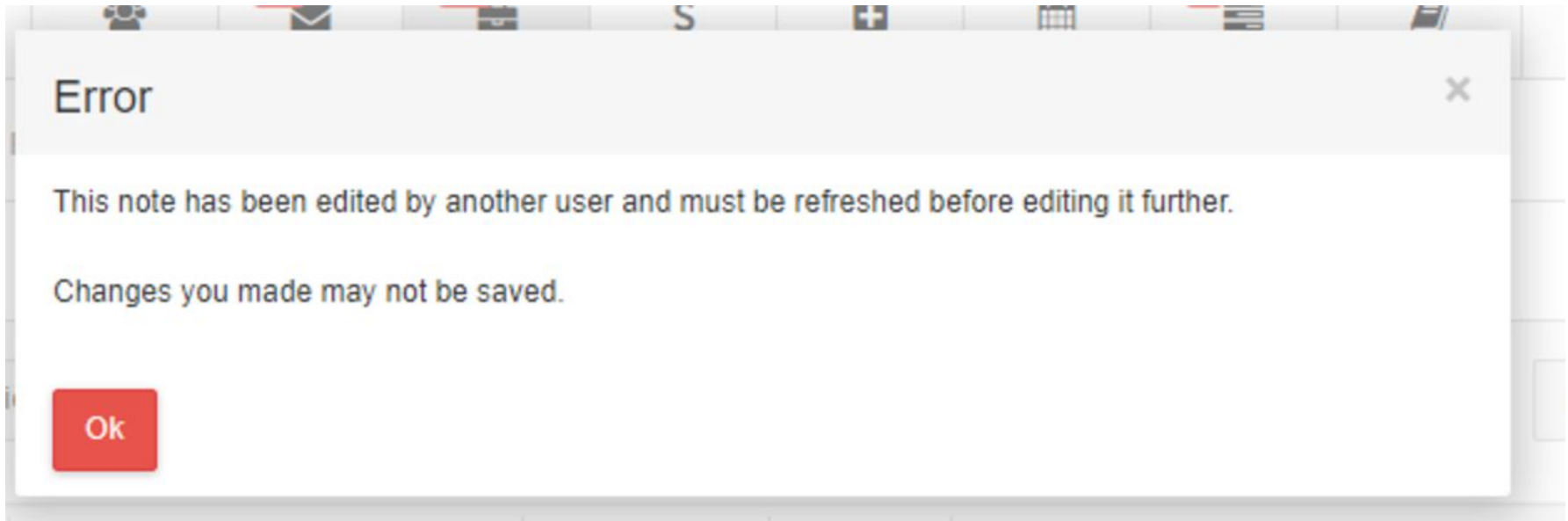
The screenshot displays the 'AUTOMATION & FILES' tab in the CentralReach interface. It features a table for 'Future Sharing' with columns for 'Documents', 'Notes', and 'Authorizations', each containing a checkbox. Below the table, there is a section for 'Contact Labels' with a text input field labeled 'Add contact label'.

Connect To		Future Sharing				
Contact/Label	Permission	Documents	Notes	Authorizations	Learn	Sessions
Employee (39 contacts)	View	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="text" value="Add contact or label"/>						

Contact Labels

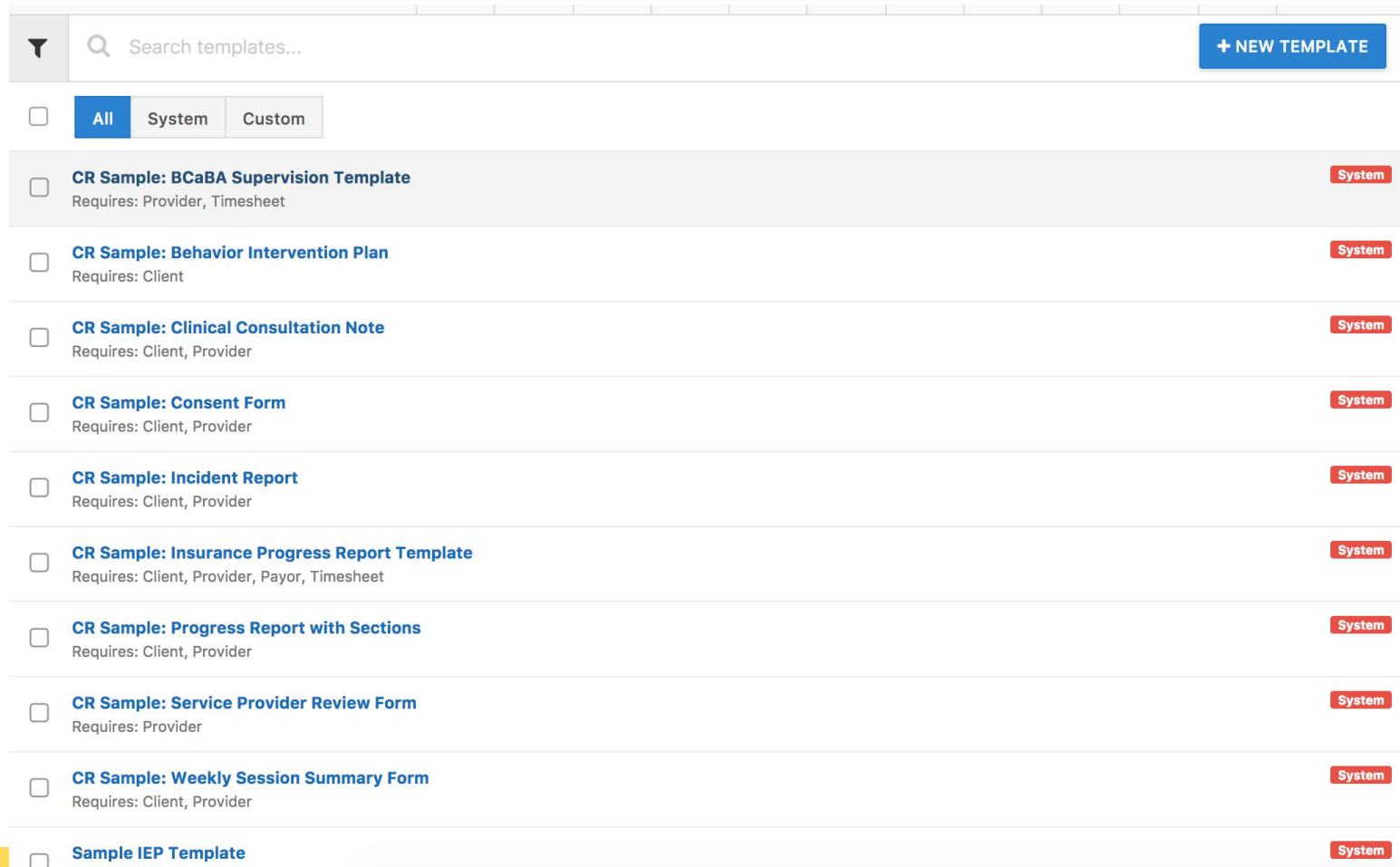
Notes & Forms Work is One at a time

- In order to make sure work is not improperly saved, we now allow only one user to work on a Note or Form at a time.
- If a user receives the below error, there is another user editing the same note or form.



Notes Templates Filters Added

- We have added simple filters that will help you save time when finding Notes Templates.
- Users can now filter their templates by System, Custom or All templates. See the image below




Share Private Library Template

- New company library workflow that promotes easier collaboration
- Users can now share private templates much easier. Easy to work on a program, course, or curriculum together before sharing it with others
- Do not need network marketplace to collaborate on library templates

[Help Article](#)

[← Learning Trees](#) [Add New](#)

Create a Learning Tree

Title	<input type="text" value="Expressive Language Curriculum"/>
Type	<p>Private Learning Tree Template For your own personal use, but can be shared with others </p> <p>Network Learning Tree Template Accessible to anyone in your network</p> <p>Marketplace Product Product for sale on http://learn.centralreach.com</p> <p>Contact Learning Tree Client Program Book, Employee Course, etc.</p>