When Do I Use Claim sets, Coded Notes, Comments , ETC . . . .?

Centricity Group Management (aka IDX/GPMS/Groupcast) is a very customizable product. This provides great opportunity for you, the customer but it also can lead to confusion. And, over time, a practice may lose sight of why or how a customized field was used.In this FAQ we will review the fields that are available to you, pros and cons of those fields and reports you can run to find out what is in those fields today.

What fields are available?

Customizable fields for data are available in Registrations and in Charges:

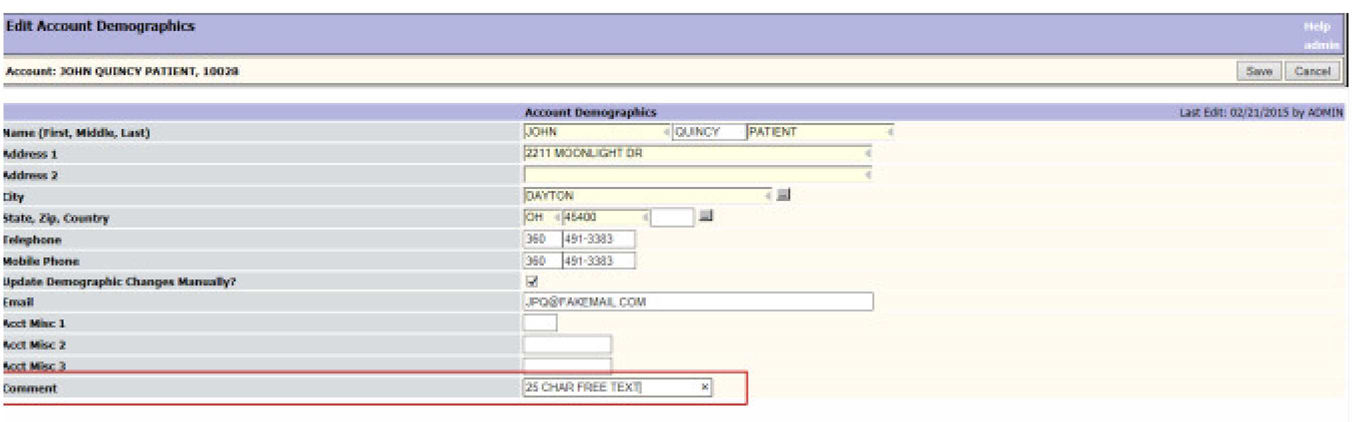
Registrations:
- What's under Comments?
- Patient Data Sets (Think Registrations)
- Coded Notes Versus Patient Notes
- Account Notes

Charges
- Claim Sets (Think Charges)

Registrations Fields: Comments

COMMENTS versus Comment!

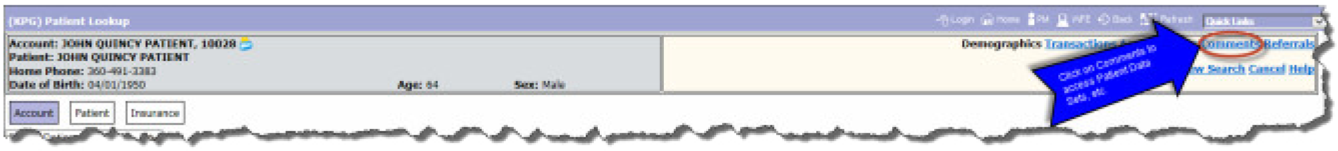
There is a field on the Account Registration screen labeled '"Comment". This field is a free text



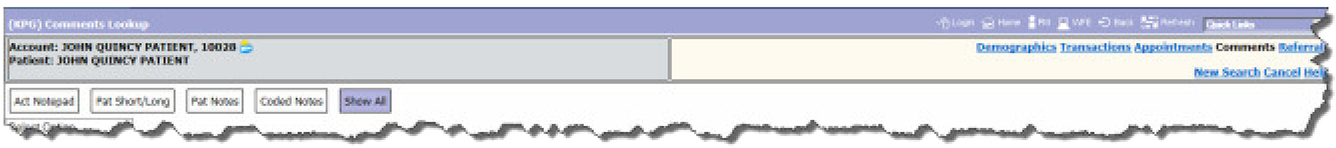
field that can be used to store up to 25 characters of data at the account level. It is not date, time or user stamped. If you have an account that you do not want to ever be purged from the system, entering DD in the first two positions in this field will prevent this account from being deleted form the system. The field name cannot be changed.

COMMENTS is the area in Centricity Group Management © where all of the customized fields are accessed when you are in the Group Management Practice Portal (GPP).

1. Click on PM.
2. Look up the patient's account.
3. From the patient look up screen, click on COMMENT.



4. The COMMENTS Lookup screen displays. What will be displayed will depend on your system and security setup.

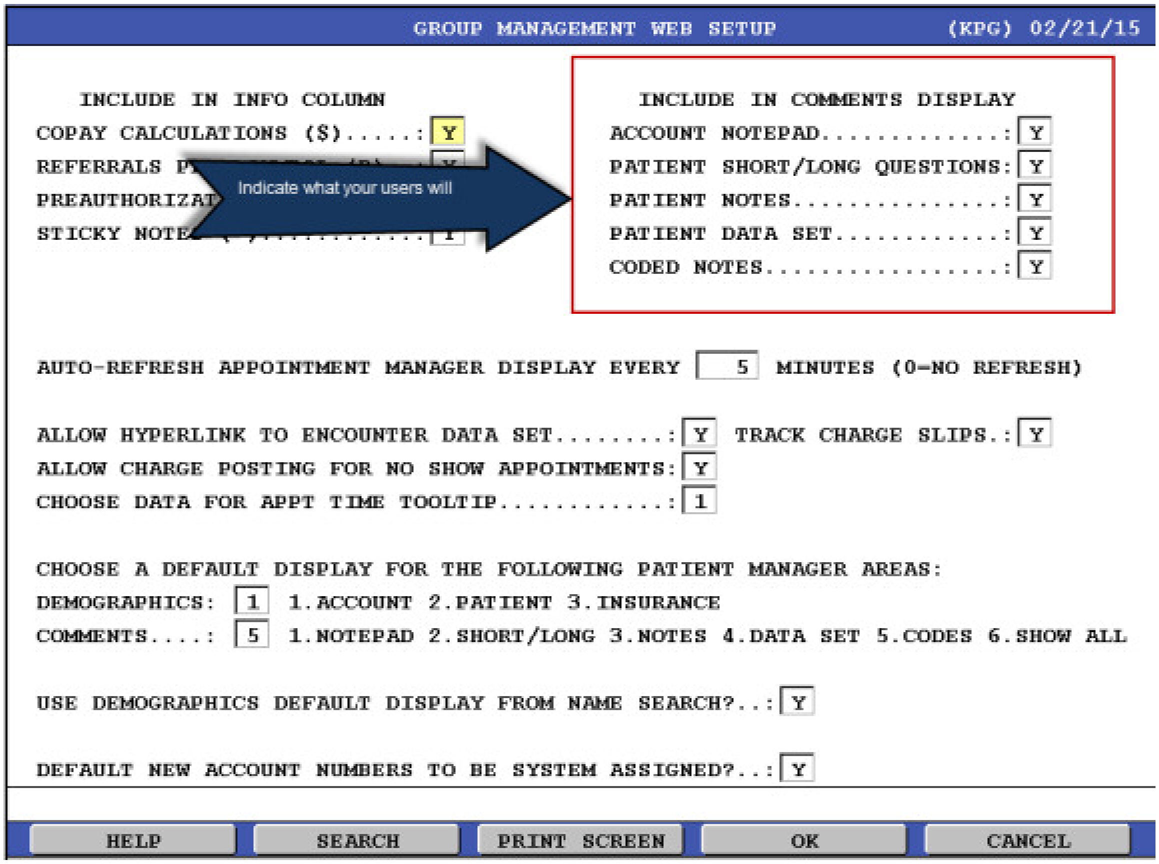


Comments: Constants Setup

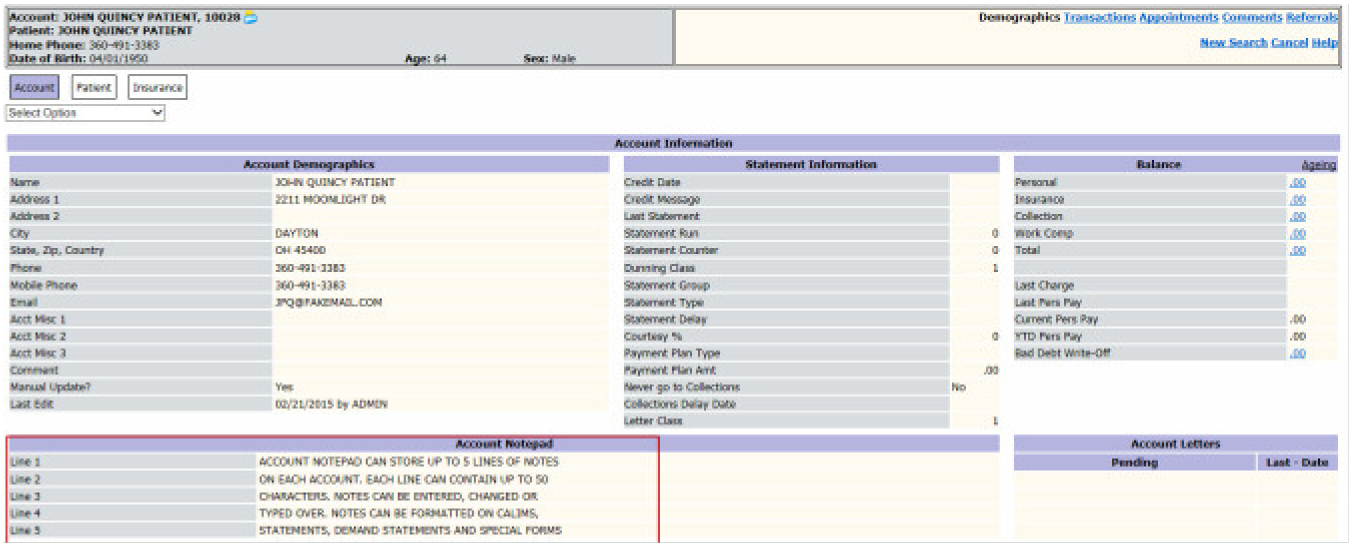
You determine what displays in COMMENTS for your users by setting up in Constants what will display in their dashboard.

1. Click on WFE to access the Group Management Menu.
2. If you are not at the Group Management Main Menu when you press WFE, press [F3] until you are at the menu that starts with 1 Enter and Post to Accounts.
3. Type 7 Set up the System. Press [Enter].
4. Type 1 Constants. Press [Enter].
5. Type 27 Web Setup. Press [Enter].

6. The following screen displays:



Include in Comments Display	Y or N
Account Notepad	If you use Account Notepad, type Y. If your practice does not use Account Notepad, type N.
Patient Short/Long Questions	If you use Patient Short/Long Questions, type Y. If your practice does not use Patient Short/Long Questions, type N.
Patient Notes (9 Pages)	If you use Patient Notes, type Y. If your practice does not use Patient Notes, type N.
Patient Data Sets	If you use Patient Data Sets, type Y. If your practice does not use Patient Data Sets, type N.
Coded Notes (also Sticky Notes)	If you use Coded Notes, type Y. If your practice does not use Coded Notes, type N.



Account: JOHN QUINCY PATIENT, 10028
Patient: JOHN QUINCY PATIENT
Home Phone: 360-491-3383
Date of Birth: 04/01/1950 **Age:** 64 **Sex:** Male

Demographics Transactions Appointments Comments Referrals
New Search Cancel Help

Account Patient Insurance

Select Option

Account Information

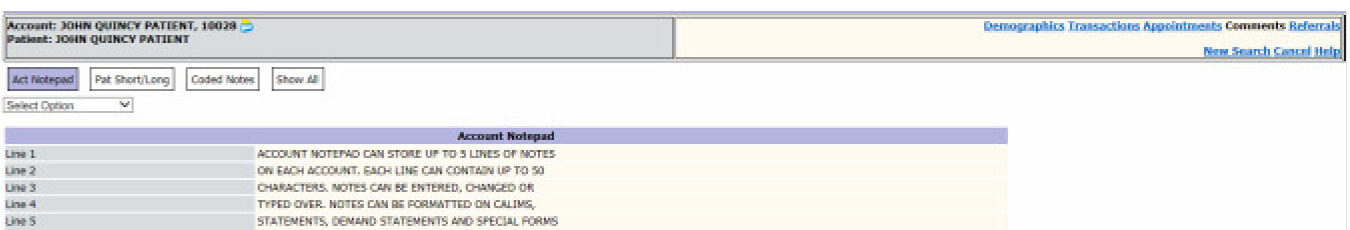
Account Demographics	
Name	JOHN QUINCY PATIENT
Address 1	2211 MOONLIGHT DR
Address 2	
City	DAYTON
State, Zip, Country	OH 45400
Phone	360-491-3383
Mobile Phone	360-491-3383
Email	JPQ@FAKEMAIL.COM
Acct Misc 1	
Acct Misc 2	
Acct Misc 3	
Comment	
Manual Update?	Yes
Last Edit	02/21/2015 by ADMIN

Statement Information	
Credit Date	
Credit Message	
Last Statement	
Statement Run	0
Statement Counter	0
Dunning Class	1
Statement Group	
Statement Type	
Statement Delay	
Courtesy %	0
Payment Plan Type	
Payment Plan Amt	.00
Never go to Collections	No
Collections Delay Date	
Letter Class	1

Balance	Ageing
Personal	.00
Insurance	.00
Collection	.00
Work Comp	.00
Total	.00
Last Charge	
Last Pers Pay	
Current Pers Pay	.00
YTD Pers Pay	.00
Bad Debt Write-Off	.00

Account Notepad	
Line 1	ACCOUNT NOTEPAD CAN STORE UP TO 5 LINES OF NOTES
Line 2	ON EACH ACCOUNT. EACH LINE CAN CONTAIN UP TO 50
Line 3	CHARACTERS. NOTES CAN BE ENTERED, CHANGED OR
Line 4	TYPED OVER. NOTES CAN BE FORMATTED ON CALIMS,
Line 5	STATEMENTS, DEMAND STATEMENTS AND SPECIAL FORMS

Account Letters	
Pending	**Last - Date**



Account: JOHN QUINCY PATIENT, 10028
Patient: JOHN QUINCY PATIENT

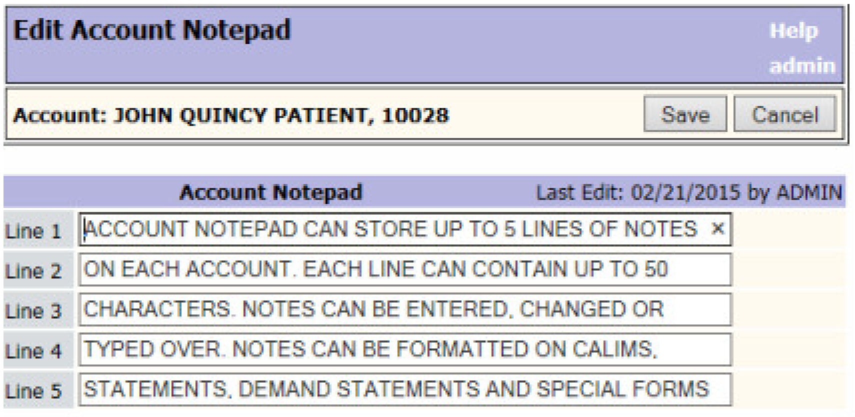
Demographics Transactions Appointments **Comments** Referrals
New Search Cancel Help

Act Notepad Pat Short/Long Coded Notes Show All

Select Option

Account Notepad	
Line 1	ACCOUNT NOTEPAD CAN STORE UP TO 5 LINES OF NOTES
Line 2	ON EACH ACCOUNT. EACH LINE CAN CONTAIN UP TO 50
Line 3	CHARACTERS. NOTES CAN BE ENTERED, CHANGED OR
Line 4	TYPED OVER. NOTES CAN BE FORMATTED ON CALIMS,
Line 5	STATEMENTS, DEMAND STATEMENTS AND SPECIAL FORMS

3. Account Notepad is NOT HIPAA compliant because the notes are NOT DATE, TIME or USER STAMPED.

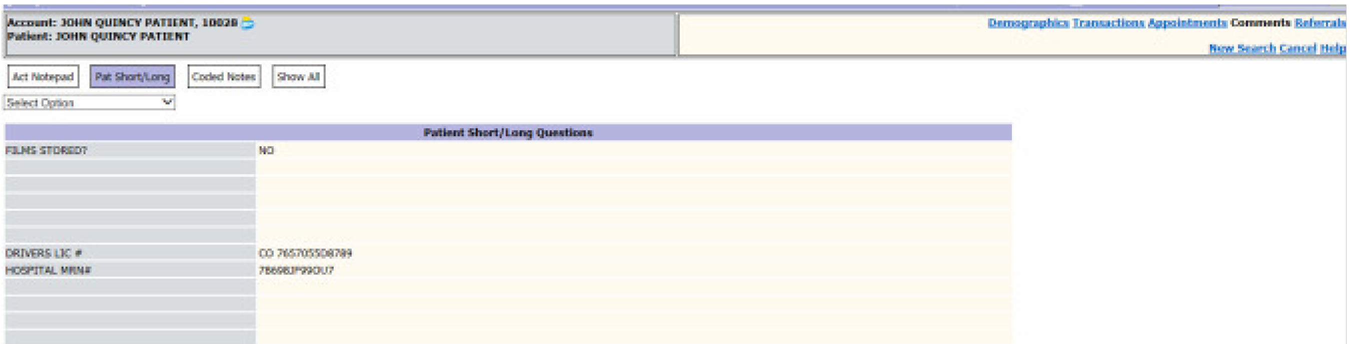


4. Additional access points for Account Notepad:

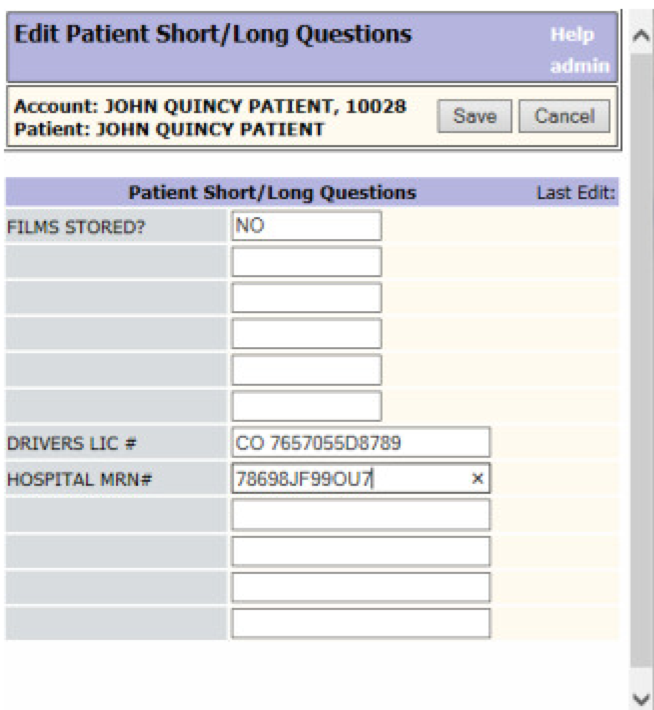
- Charges
- Payments
- Inquiry in the WFE

Short/Long Questions

1. Short/Long Questions can be edited by clicking on COMMENT and selection PATIENT SHORT/LONG QUESTIONS and selection Options and Edit PATIENT SHORT/LONG QUESTIONS.



2. PATIENT SHORT/LONG QUESTIONS are defined by your practice.



3. Additional notes about PATIENT SHORT/LONG QUESTIONS:

   - The fields are free text. Data entered is only as accurate as the data entered by end user.
   - If data is not entered consistently by all users, the data is not useful to your organization.

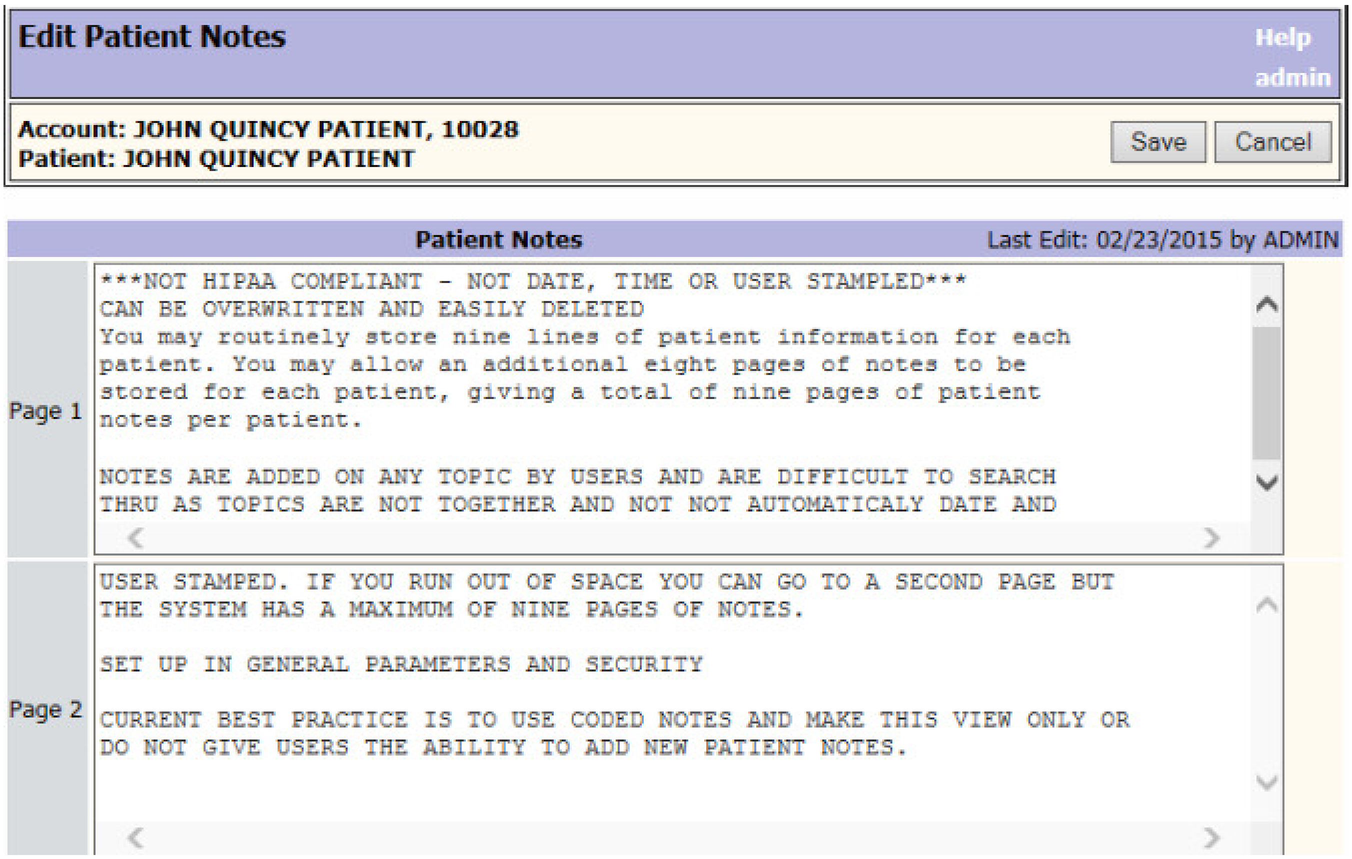
- The fields are often populated by interfaces (e.g. hospital MRN's).

Patient Notes

With the advent of new HIPAA requirement, Coded Notes were added to Group Management in 2001 and practices were encouraged to migrate Patient Notes to Coded Notes. Patient Notes are not HIPAA compliant because they are not date, time or user stamped and they can be written over thus losing the original notes. With the advent of Coded Notes, those issues were resolved. Many practices have not made the migration and are still using Patient Notes.

1. Patient Notes can be accessed by clicking on COMMENTS from the patient lookup screen. They can also be accessed from the WFE Patient search results screen.

2. Click on Options and select Edit Patient Notes.

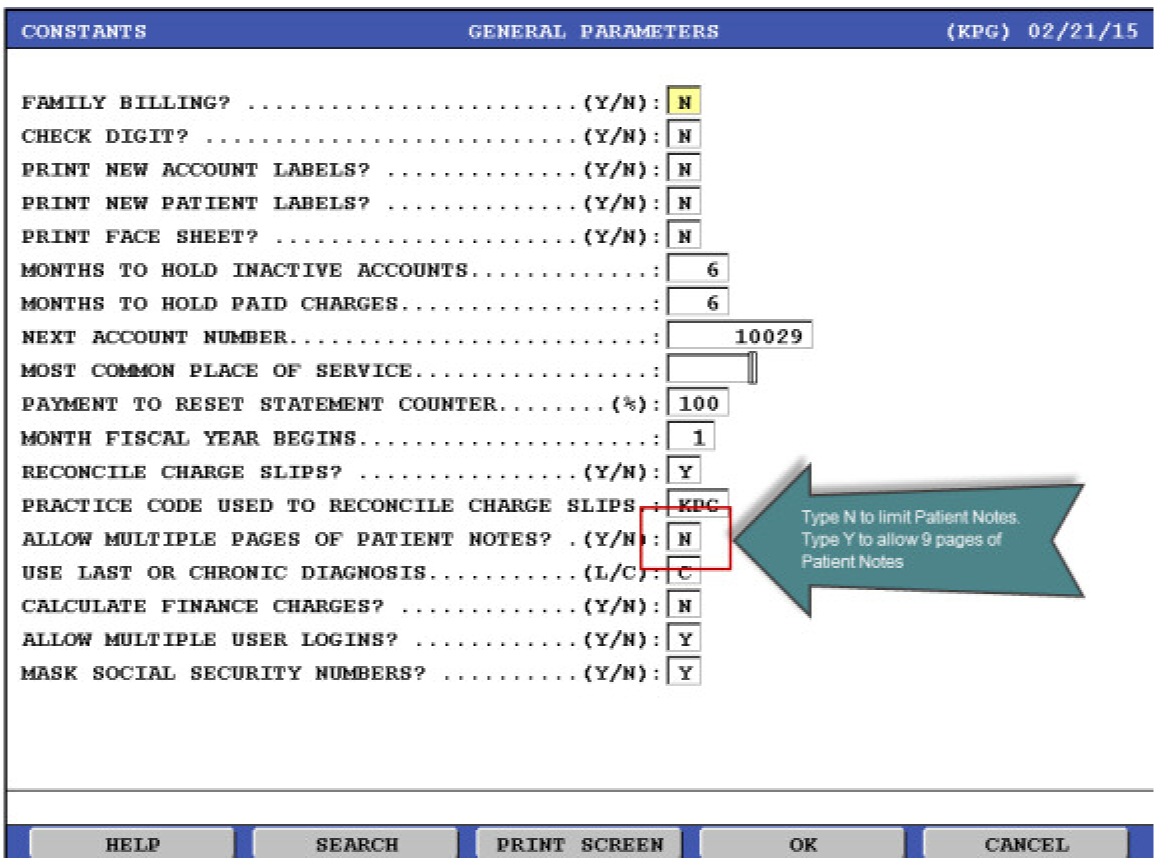


3. Additional access points for Account Notepad:
   - Charges
   - Payments
   - Inquiry in the WFE
   - Task Management (Comments)
   - Account Collections (Comments)

Patient Notes: Setup

Patient Notes can be set up a View Only for those practices that have Patient Notes that still need to be viewed but you don't want users to continue to add to the notes.

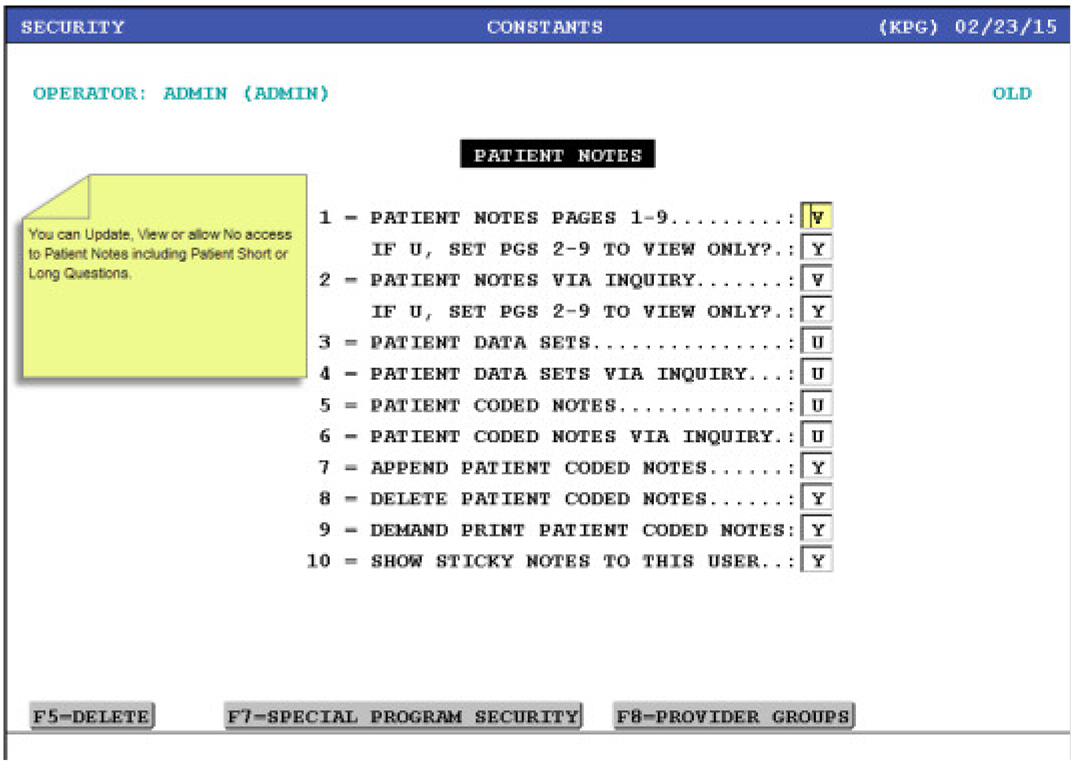
1. Click on WFE to access the Group Management Menu.
2. If you are not at the Group Management Main Menu when you press WFE, press [F3] until you are at the menu that starts with 1 Enter and Post to Accounts.
3. Type 7 Set up the System. Press [Enter].
4. Type 1 Constants. Press [Enter].
5. Type 3 General Parameters. Press [Enter].
6. The following screen displays:



7. Be aware:
   - If you have existing Patient Notes, you will still want to View the notes. Leave this parameter set to Y and change user security as noted below so new notes are not added.

- GE Healthcare does have a special program that will convert Patient Notes to a Coded note. Please contact GE Support for information.

8. Press [F3] to the Group Management Main Menu.
9. Type 7 Setup the System. Press [Enter].
10. Type 1 Constants. Press [Enter].
11. Type 1 Security. Press [Enter].
12. Press Enter to reach the following screen:



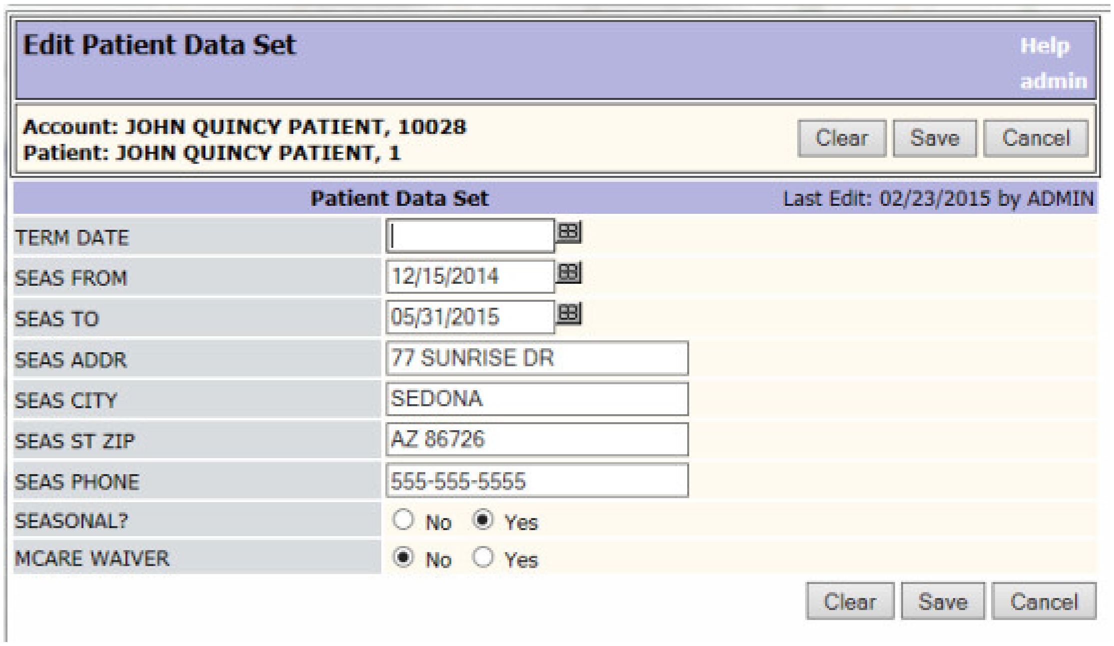
Patient Data Sets

A patient data set stores information about the patient that can be printed on claims, special forms, and custom reports. You can customize the prompts which display on the Patient Data Set screen. The customized prompts will allow you to enter information consistently for each patient, and you will know exactly where to look for it when you need it. If you change any of the prompts for patient data sets in General Parameters, this change will display in all existing patient data sets, as well as new ones.

Patient Data Sets include the following customizable fields:

Field Type	Description
Date 1 – 5	Label Up to 5 date fields may be defined. Examples of dates that might be stored at the Patient level are Termination Date; Seasonal Address Dates, etc.
Info 1 - 5	Label can be up to 12 alphanumeric characters. Data stored in these fields can be up to 9 alphanumeric characters.
Line 1 – 5	Label can be up to 12 alphanumeric characters Data stored in these fields can be up to 60 characters (per line)
Amt 1 – 5	Label can be up to 12 alphanumeric characters Data stored in these fields can be a number from 1 to 9999999.99
Data 1 – 5	Label can be up to 12 alphanumeric characters Data stored in these fields can be up to 21 alpha characters (per line) For example: Seasonal Phone: 555-555-5555
Num 1- 5	Label can be up to 12 alphanumeric characters Data stored in these fields can be up a whole number from 1 to 9999999
Y/N	Label can be up to 12 alphanumeric characters Data stored in these fields can be up a Y or N For example: Seasonal (Y/N)

Example Patient Data Set:



Edit Patient Data Set Help admin

Account: JOHN QUINCY PATIENT, 10028
Patient: JOHN QUINCY PATIENT, 1

Clear Save Cancel

Patient Data Set	Last Edit: 02/23/2015 by ADMIN
TERM DATE	
SEAS FROM	12/15/2014
SEAS TO	05/31/2015
SEAS ADDR	77 SUNRISE DR
SEAS CITY	SEDONA
SEAS ST ZIP	AZ 86726
SEAS PHONE	555-555-5555
SEASONAL?	○ No ◉ Yes
MCARE WAIVER	◉ No ○ Yes

Clear Save Cancel

Patient Coded Notes

Coded Notes are used to categorize, organize, secure, and display patient notes information. You can create different Note codes for different types of patient information. CODED NOTES were added to Centricity Group Management/GPMS/Groupcast in the last 1990's to respond to HIPAA requirements. Coded Notes added the ability to know:

- When was a note added to an account (date and time)
- Who added the note (user)
- To append to a note and keep the original note in tack.

Samples of Note Codes:

- Use APPT Note code to store appointment information
- CONSENT Note code to store consent information
- PT CARE Note code to store clinical information
- BADADDR for bad address information

Useful Features of Coded Notes:

- Easily searched and sorted for similar notes
- Easily added and appended patient coded notes information from Registrations, Inquiry, Charges, Payments, or Adjustments.
- Notes are date, time, and user stamped
- A form of Code Note called Sticky Note can be created to alert users of important patient information when accessing patient information throughout Group Management. For example, a patient may require an interpreter.

Charges: Claim Sets

What is a Charge Claim Set?

A claim set is a place to define new fields related to a charge that is used to store information that can later be added to the Primary Insurance claim. If you want information stored in a charge claim set to print on a claim form, this must be communicated with whoever writes your claim forms so it can be incorporated into the claim logic.

For example, a Worker's Compensation insurance has additional requirements when submitting claims. Some of these requirements may include physician reports on the injury, other narratives, submitting on different forms (initial, subsequent, final), and reprinting previous information sent on previous forms.

What is the best place in Group Management to setup the claim set prompts?

- General Parameters
- Insurance Code Constants
- Combination of the above

Claim set prompts can be defined in General Parameters or specific to an Insurance code. If claim set prompts are defined in both places, the Insurance code prompt takes precedence over General Parameters.

Field Type	Description
Date 1 – 15	Label Up to 5 date fields may be defined. Examples of dates that might be stored at the Claim Set level are Admit Date, Discharge Date, W/C Accident Date, etc. To require this field, type an asterisk (*) in the last position of the prompt definition.
Info 1 – 15	Label can be up to 12 alphanumeric characters. Data stored in these fields can be up to 9 alphanumeric characters. To require this field, type an asterisk (*) in the last position of the prompt definition.
Line 1 – 5	Label can be up to 12 alphanumeric characters Data stored in these fields can be up to 60 characters (per line). To require this field, type an asterisk (*) in the last position of the prompt definition.
Data 1 – 5	Label can be up to 12 alphanumeric characters Data stored in these fields can be up to 21 alpha characters (per line). To require this field, type an asterisk (*) in the last position of the prompt definition.
Amt 1 – 5	Label can be up to 12 alphanumeric characters Data stored in these fields can be a number from 1 to 9999999.99. To require this field, type an asterisk (*) in the last position of the prompt definition.

Para 1- 5	Label can be up to 12 alphanumeric characters Data stored in these fields up to 2 lines of 64 alphanumeric characters for paragraphs 1 and 2 or four lines for paragraphs 3, 4 and 5. To require this field, type an asterisk (*) in the last position of the prompt definition.
Num 1- 5	Label can be up to 12 alphanumeric characters Data stored in these fields can be up a whole number from 1 to 9999999. To require this field, type an asterisk (*) in the last position of the prompt definition.
Y/N	Label can be up to 12 alphanumeric characters Data stored in these fields can be up a Y or N. To require this field, type an asterisk (*) in the last position of the prompt definition. For example: Seasonal (Y/N)

Using Claim Sets on Charges

The claim set information can be repeated for subsequent charges by copying it to another charge. It can be edited if the existing information changes, or a new claim set can be created for a charge.

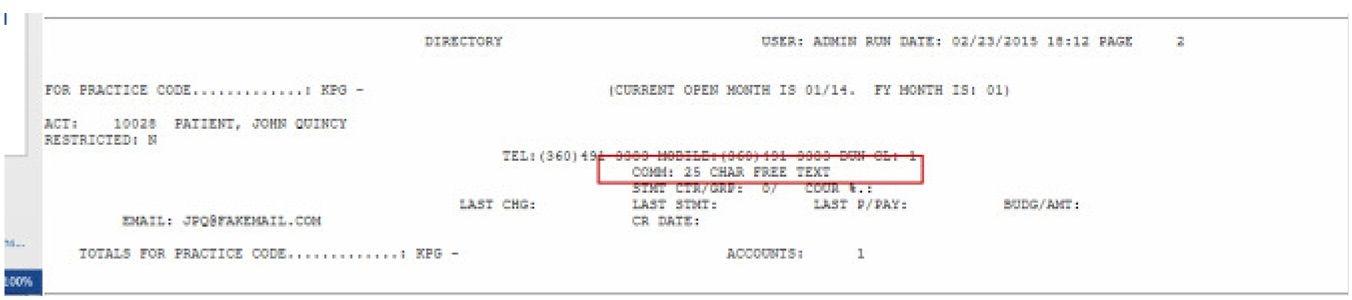
How Do I Know What Is In These Fields?

Standard Reports : Directory Report

This report will have to run for each field that you want to report because of the AND/OR requirements in the selections.

For example, if you want to know what is in Comment on the Registration: Account screen, you can run a report such as the following.

1. Select the Directory Report
2. Select G (General Selections)
3. Type Y to Account Identification and Account Information
4. Type Y to Totals
5. Press Enter
6. Type S (Sort)
7. Type 1 Account Number
8. Press [Enter]
9. Type A (Account Selections)
10. Press [F8] Page Two)
11. In Account Comment field type the question mark (?) across the field.
12. Press [Enter].
13. Run the report.
14. The report will return all the accounts with anything in the Account Comment field.



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                         DIRECTORY                    USER: ADMIN RUN DATE: 02/23/2015 18:12 PAGE     2

FOR PRACTICE CODE.............: KPG -              (CURRENT OPEN MONTH IS 01/14.  FY MONTH IS: 01)

ACT:    10028  PATIENT, JOHN QUINCY
RESTRICTED: N
                           TEL:(360)491 0000 MOBILE:(360)491 0000 DUN CL: 1
                                      COMM: 25 CHAR FREE TEXT
                                      STMT CTR/GRP:  0/    COUR %.:
                        LAST CHG:     LAST STMT:           LAST P/PAY:        BUDG/AMT:
      EMAIL: JPQ@FAKEMAIL.COM         CR DATE:

  TOTALS FOR PRACTICE CODE.............: KPG -                 ACCOUNTS:      1
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The report is a text report. You get a total number of reports but not easily imported into Excel.

You would repeat the above for each of the fields you wanted to report on.

Custom Reports: Create Your Own

It is easy to create a simple custom report that can be downloaded into Excel. Enter in the selection criteria the fields you want to report on and list them in the detail of the report.

Decision Support (Analyzer) Impromptu

Create a report in Impromptu that pulls the account and fields you want to report on. This is probably the easiest report to create. You can use this to pull reports for account or claim sets.