

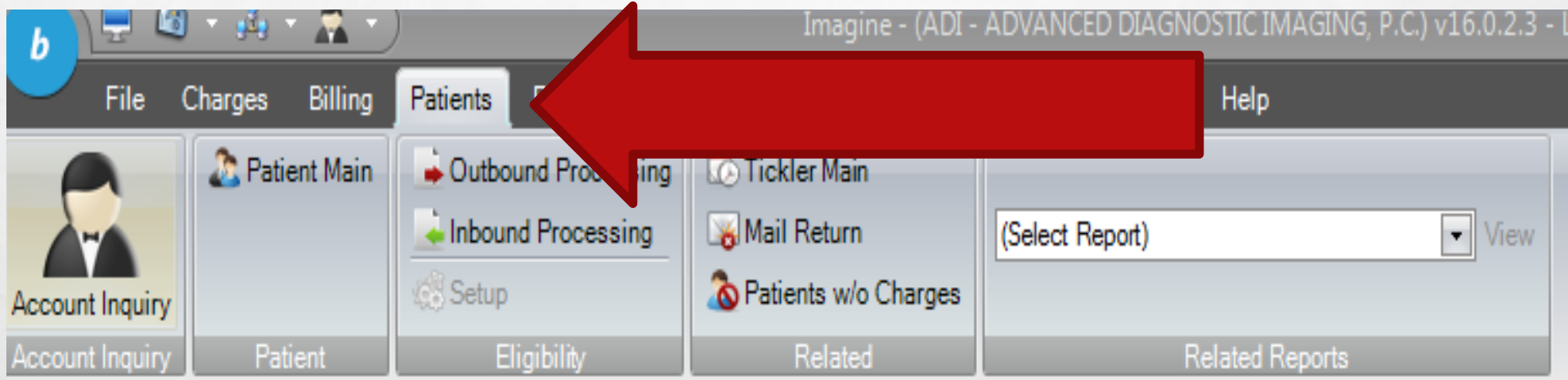
HOW TO WORK THE ACCOUNTS OUT OF TICKLER

ADVANCED HEALTH 2018



How to get to “The Tickler”

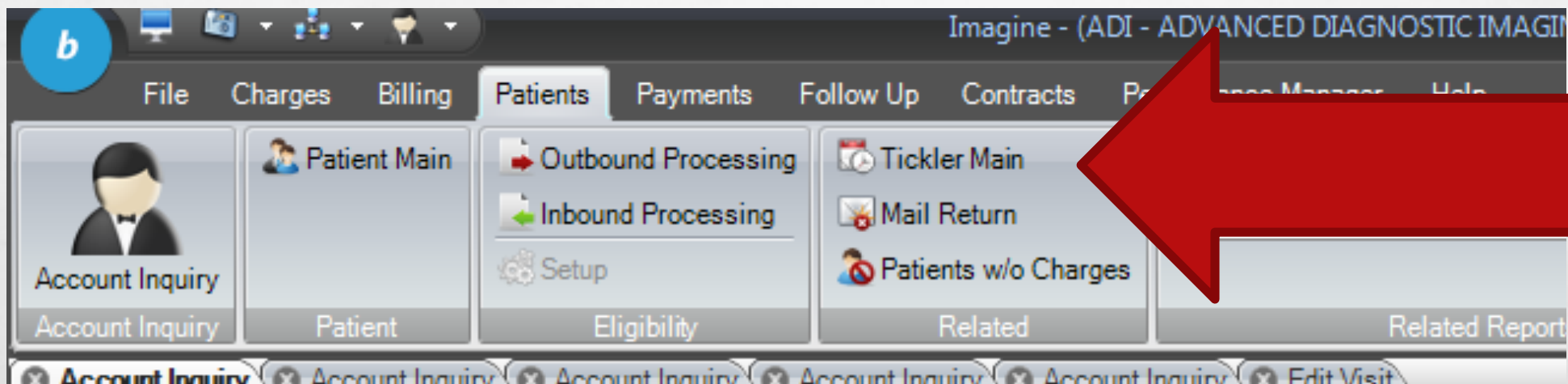
-1- select patients tab the top of the screen



How to get to “The Tickler”

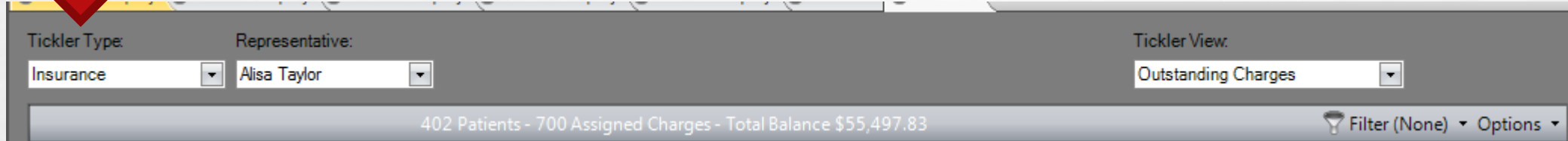
How to get to “The Tickler”

-2- Select Tickler Main



How to get to “The Tickler”

TICKLER TYPES



A screenshot of a software interface showing a header bar with several filters. On the left, there is a 'Tickler Type' dropdown menu with 'Insurance' selected, and a 'Representative' dropdown menu with 'Alisa Taylor' selected. On the right, there is a 'Tickler View' dropdown menu with 'Outstanding Charges' selected. Below these filters, a status bar displays '402 Patients - 700 Assigned Charges - Total Balance \$55,497.83' and a 'Filter (None)' dropdown menu.

AT THE TOP OF THE SCREEN TICKLE TYPE :

Insurance

Patient

Denial

Messaging

Other

You can select from the 5 different types by selecting the drop down box

TICKLER TYPE :INSURANCE

- CLAIMS FALL IN THE INSURANCE TICKLER ONCE THEY HAVE BEEN BILLED OUT OF IMAGINE (ALL CHARGES)
 - TO VIEW CLAIMS THAT HAVE BEEN BILLED TO THE INSURANCE AND HAVE NOT RECEIVED RESPONSE
- CHANGE THE TICKLER VIEW :OUTSTANDING CHARGES

Account Inquiry Patient Eligibility Related Related Reports

Account Inquiry Account Inquiry Account Inquiry Account Inquiry Account Inquiry Ticklers

Tickler Type: Insurance Representative: Alisa Taylor

Tickler View: Outstanding Charges

Tickler view: Outstanding Charges

TICKLER TYPE :INSURANCE

OTHER OPTIONS UNDER TICKLER VIEW

- **WORKED TODAY**
- **REVIEW INSURANCE**
- **NOT IN TICKLER**

DENIALS

- TO SWITCH TO THE DENIAL TICKLER
- USE THE DROP DOWN BOX TO SELECT > DENIAL

The screenshot shows a software interface for 'Imagine - (ADI - ADVANCED DIAGNOSTIC IMAGING, P.C.) v16.0.2.3'. The user is logged in as 'tayloral'. The interface includes a menu bar with 'File', 'Charges', 'Billing', 'Patients', 'Payments', 'Follow Up', 'Contracts', 'Performance Manager', and 'Help'. Below the menu bar are several toolbars with icons for 'Account Inquiry', 'Patient Main', 'Outbound Processing', 'Inbound Processing', 'Setup', 'Tickler Main', 'Mail Return', and 'Patients w/o Charges'. A search bar with '(Select Report)' and a 'View' button is also present. The main window displays a 'Ticklers' tab with a 'Tickler Type' dropdown menu. The dropdown menu is open, showing options: 'Insurance', 'Patient', 'Denial', 'Messaging', and 'Other'. A red arrow points to the dropdown menu. The 'Tickler View' is set to 'Outstanding Charges'. Below the dropdown menu, a summary bar shows '402 Patients - 700 Assigned Charges - Total Balance \$55,497.83'. A table of charges is displayed with columns: Patient First..., C., Balanc..., Max Date O..., Max Cl..., Min. Ne..., Date of Service, Insurance Plan, R..., Max ..., Insura..., and Doctor. The table contains several rows of data, including one for 'PERKINS TOMMY' with a balance of \$38.52.

Patient First...	C.	Balanc...	Max Date O...	Max Cl...	Min. Ne...	Date of Service	Insurance Plan	R...	Max ...	Insura...	Doctor
MARITIMA	1	\$386.60	49	44		08/29/2016	5002 - CIGNA SEL SOUR PL H...	NO		Primary	137 - GEORGE, DEHO
8	3	\$143.15	49	44		08/29/2016	3000 - AETNA HEALTH	NO		Primary	* Multiple *
2.	2	\$112.87	50	44		08/28/2016	5002 - CIGNA SEL SOUR PL H...	NO		Primary	15 - Jonathan, Gordon
79391	PERKINS	TOMMY	1	\$38.52	51	45	08/27/2016	* Multiple Plans *	NO	Primary	8 - Michael, Cian

FILTER

FILTERS ARE THE BEST WAY TO FOCUS ON A PARTICULAR DENIAL OR PAYER. THIS IS ONE OF THE BEST “TOOLS” FOR THE JOB. YOU CAN SAVE COMMONLY USED FILTERS AS WELL.

Filter

How to edit and save filter options

Click the upside down triangle /drop down box

Outstanding Charges

Filter (None) Options

anc...	Ma...	Max Cl...	Min. Ne...	Date of Service	Insurance Plan	R...	Max ...	Insura...	Doctor	Loc
2.68	261	211		12/27/2015	8999 - COMMERCIAL GENERIC	NO		Primary	* Multiple *	9 - V
.93	203	133		02/23/2016	93930 - Quality Medical Resear...	NO		Primary	102 - Steven, SP	90 -
.43	107	99		05/29/2016	95324 - WC ALLIANZ RESOL...	NO		Primary	22 - Michael, Lev	3 - S
376.97	288	63		* Multiple *	* Multiple Plans *	NO	Rebill	* Multip...	* Multiple *	8 - U
9.85	99	73		* Multiple *	* Multiple Plans *	NO		* Multip...	* Multiple *	* Mu
.25	365	357		* Multiple *	1004 - AMERIVANTAGE MEDI...	NO	Under...	Primary	* Multiple *	9 - V
.34	244	50		* Multiple *	6008 - TENNESSEE MEDICAID	NO	Requ...	Secon...	* Multiple *	42 -

-Then choose edit current filter

Imagine - (ADI - ADVANCED DIAGNOSTIC IMAGING, P.C.) v16.0.2.3 - Logged in as: tayloral - [Ticklers]

File Charges Billing Patients Payments Follow Up Contracts Performance Manager Help

Account Inquiry Patient Eligibility Related Related Reports

Account Inquiry Account Inquiry Account Inquiry Account Inquiry Account Inquiry Ticklers

Tickler Type: Insurance Representative: Alisa Taylor Tickler View: Outstanding Charges

402 Patients - 700 Assigned Charges - Total Balance \$55,497.83

Filter (None) Options

SELECT EDIT CURRENT FILTER

Patient ID	Insurance	Effective Date	Plan Name	Primary
73922				
84012				
22596	50	44	08/28/2016	5002 - CIGNA SEL SOUR PL H... NO
79391	51	45	08/27/2016	* Multiple Plans * NO
83984	51	46	08/27/2016	6999 - MEDICAID GENERIC NO
20683	52	46	08/26/2016	6002 - UHC COMMUNITY PLA... NO
74376	52	46	* Multiple *	3000 - AETNA HEALTH NO
775605	52	46	08/26/2016	5002 - CIGNA SEL SOUR PL H... NO

Primary 3 - Enrique Arevalos

Filter by Insurance

Filter Setup

Name: Ad Hoc Filter

Details

Additive Type	Column Name	Operator	Value
0 Filters			

Move First
Move Previous
Move Next
Move Last

Select "add"

Add Edit Delete

OK Cancel

Filter Setup

Additive Type: And

Field: Insurance Plan

Operator Type: Contains

Value:

OK Cancel

Field = Insurance plans

Operator Type= Contains

Value will be the different insurance plan based on the number they are listed in under imagine

1008-Medicare

6008-TN Medicaid

6003-Amerigroup

1004-Amerivantage

1005-BCBS Medicare Advantage

6004-BCBS TENNCARE

1013-Healthspring

1014-Humana

1003-UHC DUAL

Filter by Insurance

Filter Setup

Name: Ad Hoc Filter

Details

1 Filter			
Additive Type	Column Name	Operator	Value
And	Insurance Plan	Contains	1008

Move First
Move Previous
Move Next
Move Last

Add Edit Delete

OK Cancel

Field = Insurance plans
Operator Type= Contains
Value will be the different insurance plan based on the number they are listed in under imagine

1008-Medicare
6008-TN Medicaid
6003-Amerigroup
1004-Amerivantage
1005-BCBS Medicare Advantage
6004-BCBS TENNCARE
1013-Healthspring
1014-Humana
1003-UHC DUAL

By using the insurance filter contains
'To hide' all other insurance plans except one insurance plan (this allows you to focus a particular plan while you work)

In the example the Filter used will only show patients with the traditional Medicare plan loaded in imagine as :1008- Medicare

If you would like to capture more than one particular insurance plan under a major insurance use the insurance name instead of plan # such as UHC or BCBS

This would pull all of the insurance plans that contain UHC in the name including UHC PPO , UHC DUAL COVERAGE , UHC MEDICAID , ETC

FILTER BY DENIALS

Filter Setup

Additive Type: And

Field: Denial

Operator Type:

Value:

- Balance Amount
- Capacity to Pay Score
- Charges
- Date of Service
- Denial
- Department
- Doctor

Select Denial for field

Filter Setup

Additive Type: And

Field: Denial

Operator Type: Contains

Value:

OK Cancel

Add Edit Delete

OK Cancel

Select Contains under operator type

In the Value box you can use an imagine for common denials or type out the denial

COMMON IMAGINE DENIALS

97-INCLUDED IN PRIMARY PROCEDURE

197-PRECERT ABSENT

119- BENEFIT MAXIMUM HAS BEEN REACHED

22 – ADJ MAY BE COVERED BY OTHER PAYER COB

50- NON COVERED SERVICE DEEMED NOT A MEDICAL NECESSITY

MA27- MISSING INCOMPLETE/ INVALID MEDICARE # OR NAME

4- PROC CODE INCONSISTENT WITH MODIFIER

252- OTHER DOCUMENTS NEEDED TO PROCESS CLAIM

24- MANAGED CARE PLAN

29- TIME LIMIT FOR FILING HAS EXPIRED

B9- PT IS ENROLLED IN HOSPICE

5- PROCEDURE CODE INCONSISTENT WITH POS

204- SERVICE / DRUG NOT COVERED UNDER PT PLAN

165- REFERRAL ABSENT OR EXCEEDED

Using multiple filters

To make the tickler view more specific you can combine filters by Selecting an insurance and denial to focus on

Medicare insurance plan is already selected

Select add

Additive Type	Column Name	Operator	Value
And	Insurance Plan	Contains	1008

Specific insurance and specific and denial

Select ok when you are finished

2 Filters			
Additive Type	Column Name	Operator	Value
And	Insurance Plan	Contains	1008
And	Denial	Contains	18

An additional filter box will populate
Field : select from the drop down box another filer such as denial
Operator type :Contains
Value : 18 (imagine denial # for duplicate)

Result

947.57 Filter (Ad Hoc Filter) Opt

i...	Denial	Insurance Plan	Max Action
	18 DUPLICATE CLAIM/SERVICE - 18	1008 - MEDICARE PART A...	
	18 DUPLICATE CLAIM/SERVICE - 18	1008 - MEDICARE PART A...	
	18 DUPLICATE CLAIM/SERVICE - 18	1008 - MEDICARE PART A...	
	18 DUPLICATE CLAIM/SERVICE - 18	1008 - MEDICARE PART A...	
	18 DUPLICATE CLAIM/SERVICE - 18	1008 - MEDICARE PART A...	
	18 DUPLICATE CLAIM/SERVICE - 18	1008 - MEDICARE PART A...	
/...	18 DUPLICATE CLAIM/SERVICE - 18	1008 - MEDICARE PART A...	CORRECTION...