Synergistic Office Solutions, Inc.

Topic: **Transaction Entry Efficiency Tips**
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Overview

When correctly configured, most charges can be entered into OMWin with just a few keystrokes, specifically the selection of a patient and the entry of the desired service shorthand code. All other required information will usually be defaulted or calculated and entered for you.

Insurance payment entries in OMWin require that the payment be properly applied to previous charge entries, so depending on the nature of the credit being applied, these transactions can require a bit more work. Even with credits (payments and adjustments) there are more and less efficient ways to enter data.

Mouse vs. Keyboard

As a general rule of thumb, using <Tab> and <Alt> key combinations generally will result in faster data entry. Moving back and forth from the keyboard to the mouse is extremely inefficient.

Default Values

The first time you enter a charge for a patient account, you will have to specify more information than on subsequent entries for that account. OMWin "remembers" the last provider, claim setup, place of service, and sort code. As soon as you select the desired patient account, all this information will appear. Provider code will default to the most recent provider to have seen the patient, the patient's primary provider, or to blank, based on your specification in **Setup > System Options > Other**.

Specify Default Fees and Provider Fee Schedules

In most organizations there is a standard fee for each service, or at least for each service according to provider. Make sure that you specify the standard fee on the Service Form, and enter any applicable fee schedules (OMWin accommodates provider-type schedules, provider-specific schedules, and any combination of the two). You can access the provider-specific fee schedules from the Provider Form or the scheduled fees for each service from the Service Form. Properly configured fee information eliminates the need to enter fees manually.

Patient Portion Settings

If you properly configure your patient, billing, and managed care information, you rarely will have to manually modify the charge splits that OMWin creates automatically for you. Manual modification of charge splits will take at least as long as the rest of the transaction entry, so you should do whatever you can to get your copay set up correctly. Study the copay calculation flow chart in the OMWin manual and read the related text until you understand how copayment amounts are calculated. If you are dividing the patient portion among two or more private payors, be sure to set the percentages for each payor under the patient's **Billing** button.

If you are unable to set patient portions for some reason, the next best approach is to set the patient (assuming that there is some insurance coverage) to zero percent responsibility. That will force OMWin to split the entire fee to the primary insurance. When insurance payments are received, you can easily transfer the remainder to the secondary carrier or the patient. Concerns about delayed billing of patient portions may be handled by requiring a reasonable prepayment by the patient and entering that amount in OMWin as an unapplied credit (prepayment). That amount can be kept on the account for later application to fees not covered by insurance.

Type Codes When You Know Them

It is almost always slower to select from a list rather than typing the shorthand code for the desired patient, provider, service, modifier, or place of service. Use codes and ID's that are short and easy to remember so that typing them directly will be possible most of the time.

Keep in mind that OMWin allows patient ID's to be up to 20 characters, including any combination of letters and numbers. We have become accustomed to numeric ID's, but you might find it preferable to use a patient ID that consists of some portion of the last name and initials, with an added digit to avoid duplicates when necessary.

Service codes should be short mnemonics or common sense abbreviations, such as "HR" for a psychotherapy hour, "OV" for standard office visit, "IC" for initial consult, and "ICX" for initial consult - extensive. Even if you prefer to use CPT codes as shorthands because you know them thoroughly, entering those five digits is still likely to be faster than selecting from the Services List.

Finally, do not despair if you made poor selections when you initially set up your shorthand codes. Changing them is as simple as opening the form for the item you want to change and typing over the bad shorthand code with another that is easier to remember and to type. Your change will automatically appear in all previous entries in which you used that code.

Shortcuts

Whenever possible, use one of the available shortcuts to speed your transaction entry.

Copy Previous

Whenever you are entering a charge transaction that is the same as one previously entered for this patient, use the **Copy Previous** button to quickly duplicate that entry with the new date. Invoke this feature using <Alt><Y>, <F7>, or <Ctrl><Q>.

Automatic Display of Patient List

OMWin makes the assumption that your next transaction (charge or credit) will be for the same patient account as the previous one. This saves a good deal of time in organizations that frequently enter multiple services for a single patient visit, or enter a charge and two or more credits for the same patient account. If your pattern is more likely to be a new patient account for every transaction, you can save a couple of keystrokes by setting the *Popup patient table automatically* user option. This option tells OMWin to start each transaction with the Active Patient List open and ready for you to select a patient account. Note that this option is set on a user-by-user basis, so anyone who wants the program to work this way must log into the program and set the option under **Setup > User Options > Other**.

Payment Received

If you are entering a charge followed by a payment for that service, be sure to set the *payment received* mark next to the appropriate charge split(s) before saving the charge entry. OMWin will automatically open a partially completed credit form for you prior to proceeding with your indicated save option (**Next Charge**, **Next Credit**, or **Daysheet**).

You can select the charge split list at the bottom of the Charge Form by pressing <Alt><Z>. Once the list is selected, use the arrow keys, if necessary, to highlight the desired split, then press <Alt><R> to set the payment received mark. A check will appear to the left of the split.

Use "New Check" Instead of "Check"

The "New Check" selection in the *Credit Type* drop list is there for only one reason: to save you time and steps. You should always select this option rather than "Check" unless you are applying additional payments from a large check that you have already registered with the system. By selecting "New Check" you tell OMWin that you want to go directly to the Check Form to enter the details of the check. Otherwise, the check list will appear and you will have to press <Tab> then <Alt><A> to get to the same place.

Use Auto-Apply For Non-Insurance Credits

Insurance payments and adjustments must be applied to specific items in order to properly track billings. Non-insurance credits, however, in most cases will be applied to whatever has been outstanding the longest. Rather than applying these payments manually, after entering the *CreditType* and *Amount*, use the **Auto** button, <Alt><U>, to instantly apply the credit to the oldest outstanding items.