

## Patient Information

- Family Billing
- Responsible Party
- Planned Visits
- Transcription Feature
- Automatic Dunning Messages
- User-defined Patient Categories
- Patient Search by Name, ID, SS Number, DOB, Phone, Responsible Party, or Insured Name
- Global search for patients through all practices in the system
- Medical Alert Information
- Appointment History
- Automatic Account Aging
- Multiple Primary/Secondary Plans Using Plan Sets
- Effective Dates of Plans
- Easy Input of Insured's Info
- Tracks Chronic Diagnoses
- User-defined Search Arguments
- General/Encounter-specific Notes
- Tracks History of Patient Bills
- Tracks History of Claims Filing
- Tracks Referrals In and Out
- Patient E-Mail Address
- Store Patient Pictures
- Scan Insurance Cards
- Specify Required Fields
- Five User-Defined Patient Fields on the Misc tab

**P**atient information is kept in five tabs within the patient's detail. They include:

- **Detail Tab:** This tab displays complete demographics including personal messages, medical alerts, and financial information.
- **Plan Sets Tab:** This tab displays complete insurance plan information. Plans can be grouped into "sets" and may include multiple primary, secondary, or tertiary plans with effective dates.
- **Cases Tab:** This tab displays chronic diagnoses, injury dates, last x-ray date, and disability dates. Each patient can have many cases which are linked to plan sets.
- **Notes Tab:** User-created notes can be stored within the patient's detail. Each one is dated and can contain any amount of text.
- **Misc Tab:** This tab displays emergency contact information for the patient, the patient's last four diagnoses, search arguments of the patient, and the patient's e-mail address.

**P**lan Sets are groups of the patient's insurance plans. The patient can have multiple primary, secondary, and tertiary plans—even with overlapping effective dates—by utilizing plan sets. **Cases** are used to record chronic diagnoses and employment information for the patient that automatically defaults when posting charges. Each case is linked to a plan set to separate patient illnesses or injuries that need to be billed to different insurance plans (such as worker's compensation). When charges are posted for a particular case, the default plan set for that case determines the primary insurance plan.

Posting	Service	Code	Diagnosis Desc	Provider
05/24/2002	09/10/2001	285.9/0	ANEMIA	1 -KUMAR, AJIT W
05/24/2002	09/10/2001	780.6/0	FEVER/HYPERPYREXIA	1 -KUMAR, AJIT W
06/08/2002	06/01/2002	402.90/0	HYPERTENSION/HEART UNSPECIFIED	1 -KUMAR, AJIT W
06/08/2002	06/01/2002	780.6/0	FEVER/HYPERPYREXIA	1 -KUMAR, AJIT W
06/16/2002	06/16/2002	842.00/0	SPRAIN/WRIST	1 -KUMAR, AJIT W
06/17/2002	06/17/2002	285.9/0	ANEMIA	1 -KUMAR, AJIT W
06/17/2002	06/17/2002	402.90/0	HYPERTENSION/HEART UNSPECIFIED	1 -KUMAR, AJIT W

Count: 7

**D**iagnosis History can be recalled and printed right from the **Patient Detail**. As illustrated to the left, all diagnosis codes entered to the patient's account display in a window, including the posting and service dates for the diagnosis.

# More Patient Information Features

**T**rack codes: This feature allows user-specified procedure codes (or groupings) to be tracked and recalled. The system displays the posting date, service date, code, fee, and provider associated with the procedure.

## MEDICAL RECORDS

Account NO.: 1001.0  
 Name: SMITH, ANTHONY I.  
 Address1: 897 E. MAIN ST.  
 Address2:  
 Name: BOARDMAN, OH 44512  
 Phone: (330) 758-3345  
 SS#: 528759957  
 Chart No: M1001.0  
 DOB: 09/21/1933  
 Provider: 1 - KUMAR, AJIT W  
 Responsible Party: JONATHAN R. SMITH  
 RP Phone# (330) 533-0998  
 Chronic Diagnosis: 402.900 285.90

## HISTORY

Date: 04/03/2001  
 Tony passed out at home today. Slight contusion--right side scalp.  
 Not serious. Working on tests to determine cause.

## Date: 05/23/2001

Showing signs of elevated blood sugar. Confining diet to exclude sweets.  
 Schedule follow-up in one week.

Service	Code	Pos	M1	M2	M3	Description	Fee	Provider
09/07/2001	99203	11				OFFICE VISIT-NEW PT DETAILED	76.00	1-KUMAR, AJIT W
09/07/2001	93000	11				EKG	56.00	1-KUMAR, AJIT W
09/07/2001	85025	11				CBC w/ DIFF	21.00	1-KUMAR, AJIT W
09/22/2001	80019	11				SMAC	51.00	1-KUMAR, AJIT W
09/22/2001	99203	11				OFFICE VISIT-NEW PT DETAILED	76.00	1-KUMAR, AJIT W
06/17/2002	93000	11				EKG	56.00	1-KUMAR, AJIT W
06/17/2002	81000	11				URINALYSIS w/ WITH MICRO	16.00	1-KUMAR, AJIT W
06/17/2002	85025	11				CBC w/ DIFF	21.00	1-KUMAR, AJIT W
06/17/2002	99203	11				OFFICE VISIT-NEW PT DETAILED	76.00	1-KUMAR, AJIT W
06/17/2002	80019	11				SMAC	51.00	1-KUMAR, AJIT W

Count: 10

**P**atient medical records can be created and electronically stored on the computer.

- The records can be accessed by simply clicking the chart icon to the side of the patient's detail screen.
- MicroMD allows the record to be launched with the WordPad program included in Windows or Microsoft Word, if it is installed on your system.
- Default information automatically displays on the upper portion of each patient's record. MicroMD dates the last line and allows the operator to edit or include new text.

**R**esponsible Party information can be entered into the screen at the left. This allows the bill or statement to be sent to someone other than the patient. The person does not need to be included in the system as a patient, only the information on this screen is needed to ensure that the patient's bill or statement is sent to this address.

Save		Cancel		Delete	
Last Name	SMITH				
First Name	JONATHAN	MI	R		
Address	906 SPRING ST.				
	CANFIELD, OH 44406 -				
Home Phone	(330) 533-0998				
Work Phone	(330) 755-9088				

Order #	Placer Order No.	Filler Order No.	Status	Ordering Provider		
0001700	0001703	TP003096T	Complete			
Results						
#	Result Date	Service ID	Service Description	Status		
2	08/29/2000	63995B=	CBC (INCLUDES DIFF/PLT)	Final		
Tests						
#	Code	Observation Description	Value	Units	Flags	Status
1	30000000	WHITE BLOOD CELL COL	11.2	THOUS/M	High	Final
2	30000100	RED BLOOD CELL COUN	4.56	MILL/MCL	Normal	Final
3	30000200	HEMOGLOBIN	13.2	G/DL	Normal	Final
4	30000300	HEMATOCRIT	45.2	%	Normal	Final
5	30000400	MCV	33.3*	FL		Final
6	30000500	MCH	44.4	PG	High	Final
7	30000600	MCHC	55.5	G/DL	High	Final
8	30000700	RDW	33.4	%	High	Final
9	30000800	PLATELET COUNT	233	THOUS/MM	Normal	Final
10	30004600	MPV	DNR	FL		Cancelled
11	30001700	ABSOLUTE NEUTROPHIL	3808	CELLS/MC	Normal	Final
12	30000900	NEUTROPHILS	34	%	Normal	Final

**L**ab Results displays all of the lab results for the given patient from the file provided by the lab interface. MicroMD reads the XML file downloaded from the lab software and translates that to a user-friendly format.

Several reports are available within this module. You can:

- Generate a report with the order information, result information, and test information that pertain only to the individually selected test or result
- Generate a report with the order information, all results pertaining to that order, including every test performed for any of the results

**W**hen the insurance plan has authorized a set number of visits for a certain procedure or diagnosis to be done within a specific period of time, *planned visits* can be tracked through the *patient's detail screen*, *charges screen* or from the *appointment screen*. MicroMD tracks these items as they are posted to the patient's account and will display the remaining number of visits and the date range.

CPT	Procedure Desc	ICD	Diagnosis Desc	Date From	Date To	V	R	Authorization	Notes
90788	INJ/INTRAMUSC	939999	ALL	2/22/02	1/21/03	12	8	AU99876	
939999	ALL	477.9/0	ALLERGY/RHIN	3/22/02	3/21/03	12	10	9877123	REQUIRES ANNUAL TESTING

## OTHER FEATURES:

- Assign a chart number to a patient in addition to system-assigned account number
- Custom Recall—able to set up recall based on procedure, diagnosis, provider and location. Another recall option allows a recall to be set up based on the patient's age, birth date, provider or location
- Ability to flag duplicate patient information that is being entered into the system.