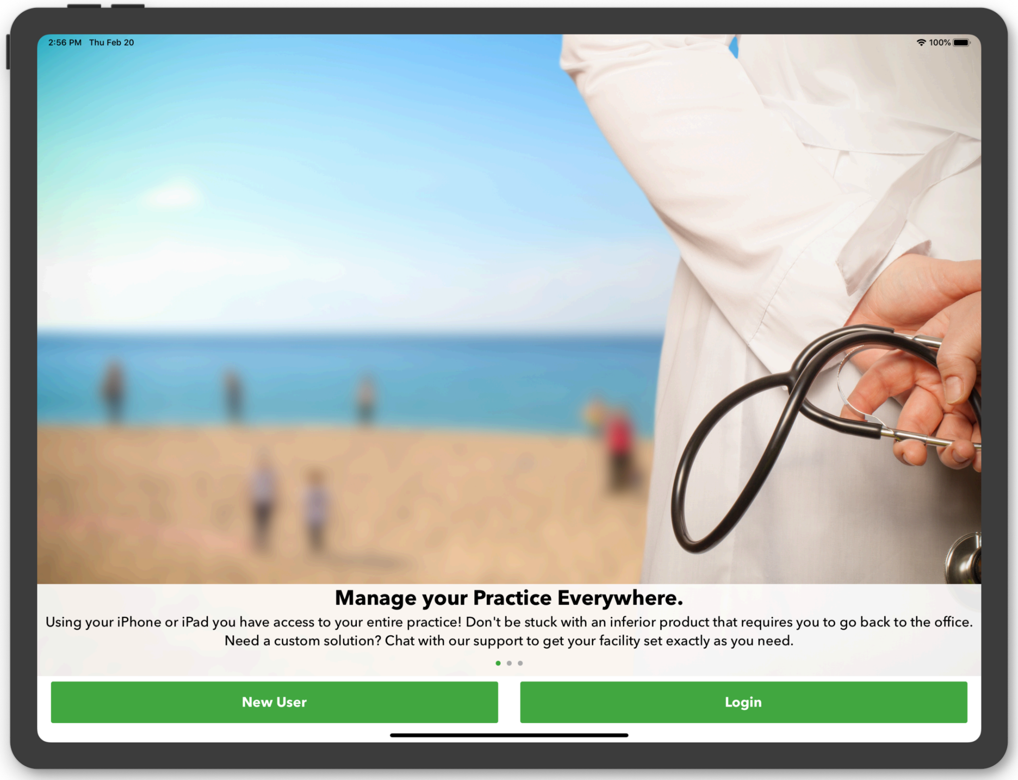
by: Jaafar Al-Maliky

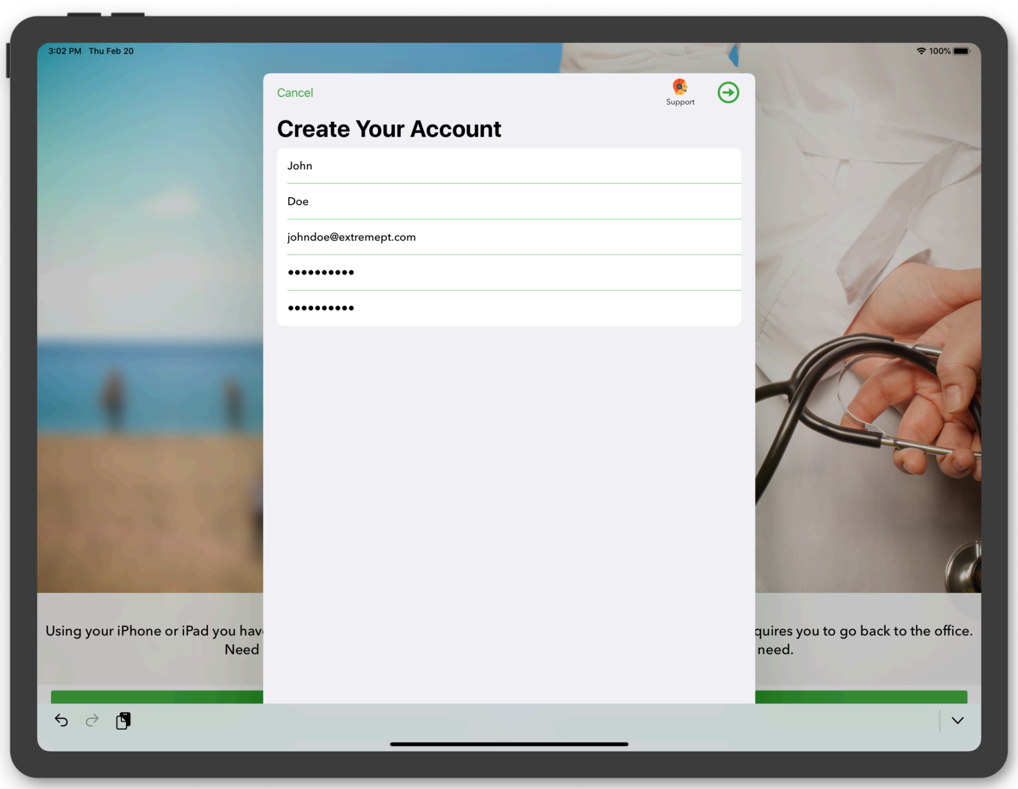
ETC PRACTICE MANAGER

USER GUIDE

A)



B)

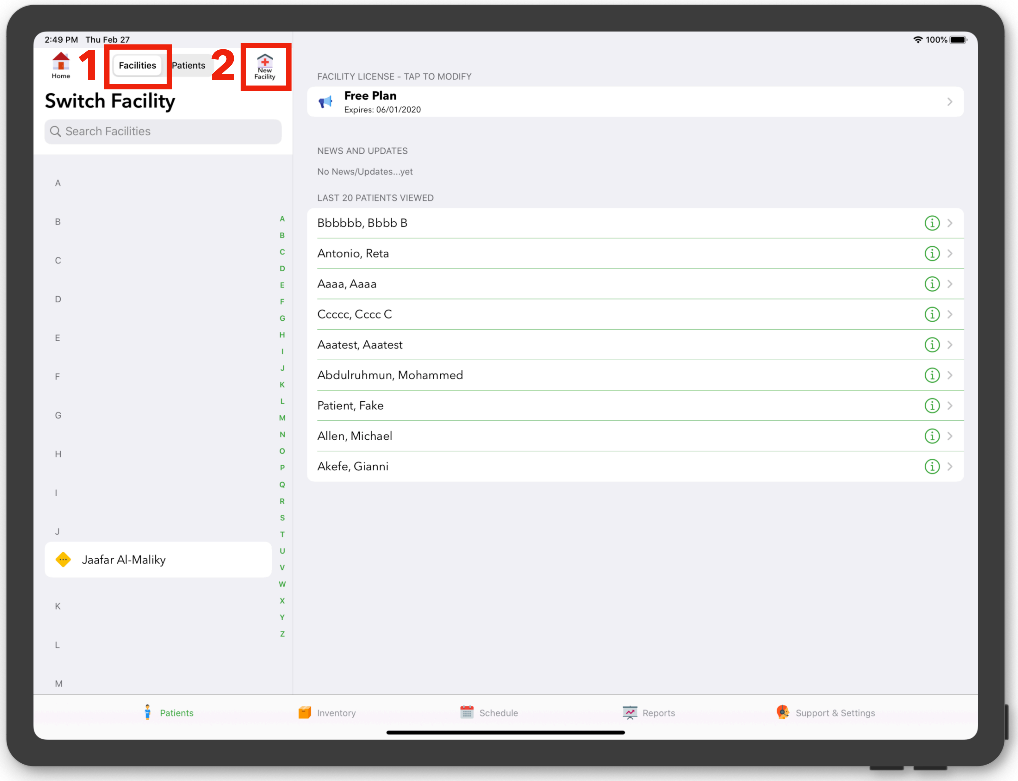


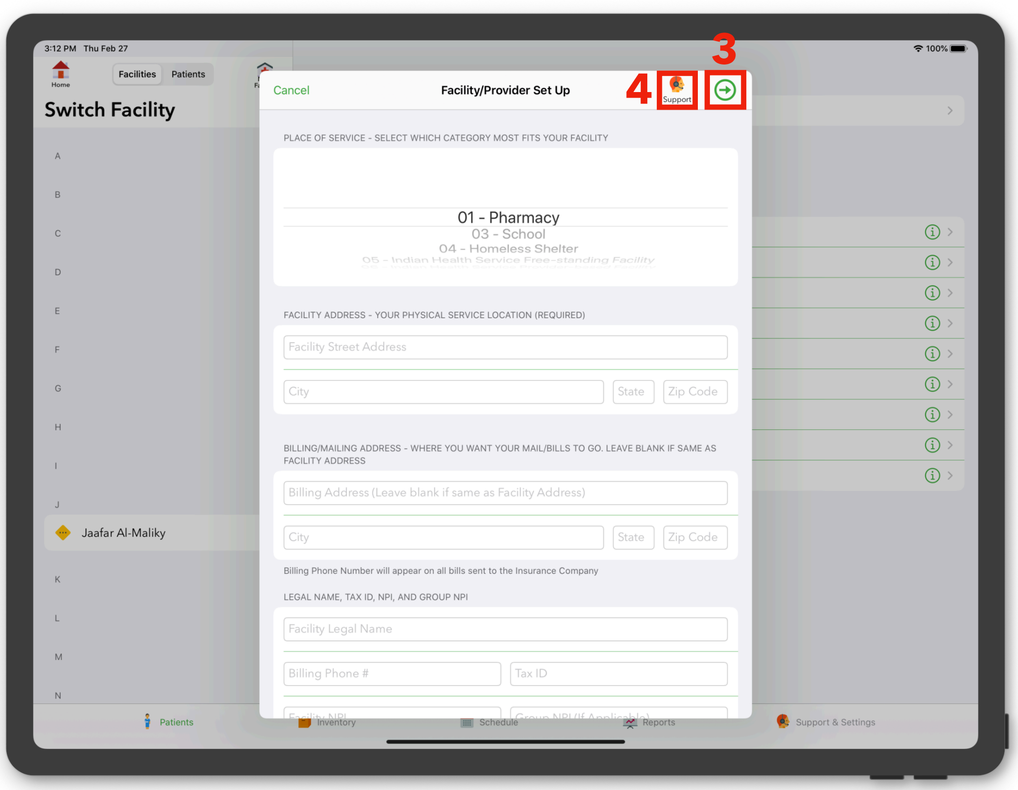
1. SIGNING UP

A) After downloading the app, tap to open the app, then tap '**New User**'.

B) Fill out the required information, then tap the arrow button in the top right hand corner of the create your account screen.

C) If you need any further assistance during the sign up process tap the Support 'Support'.





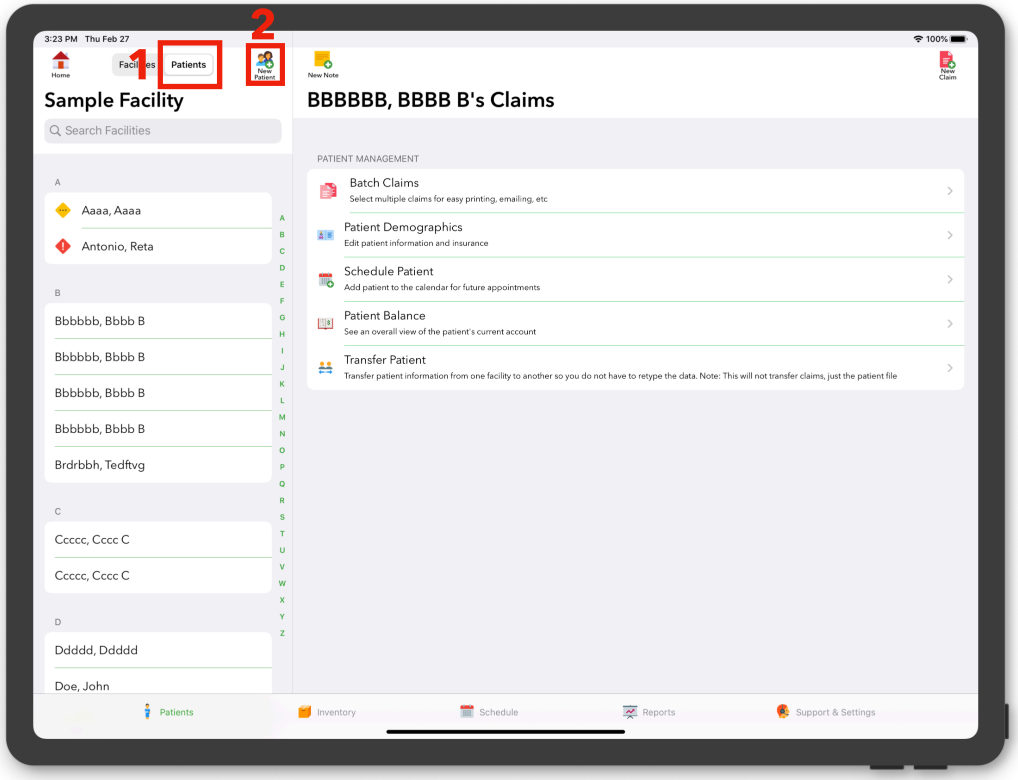
2. ADDING A FACILITY

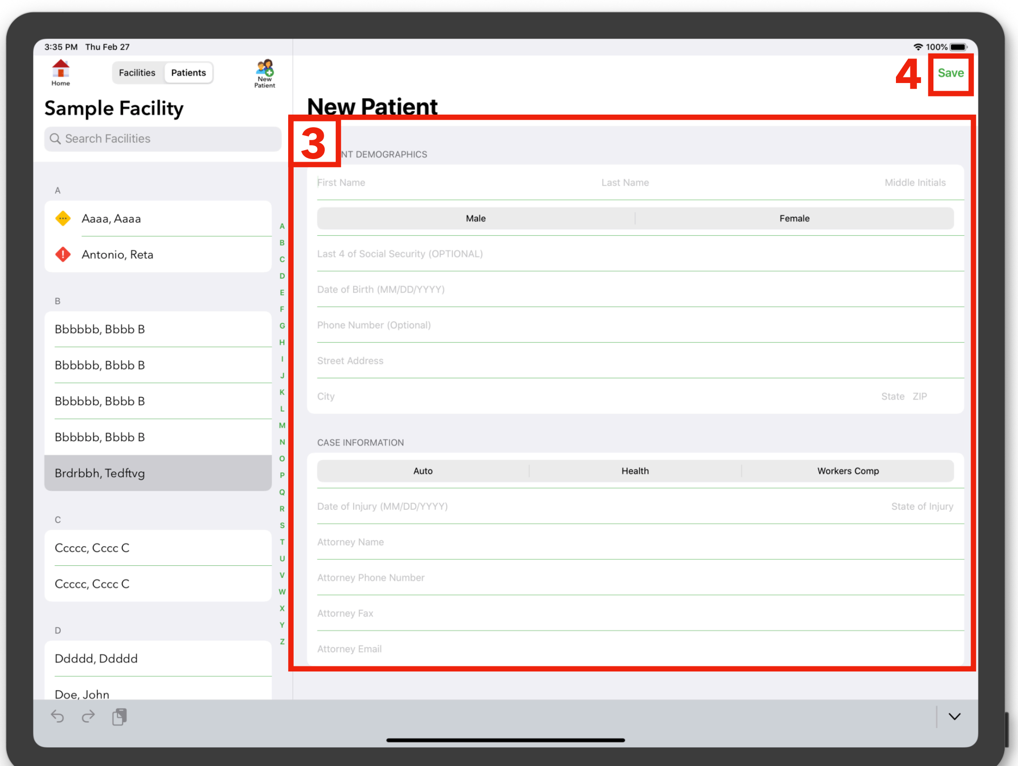
1. Highlight facilities by tapping the facilities/patients switch located on the top let hand corner near the home button.

2. Once highlighted, tap 'New Facility' to the right of the switch.

3. Enter the required information and tap the arrow in the top right hand corner.

4. If you need any assistance tap the support button to the left of the arrow and you will be connected with a support agent briefly.





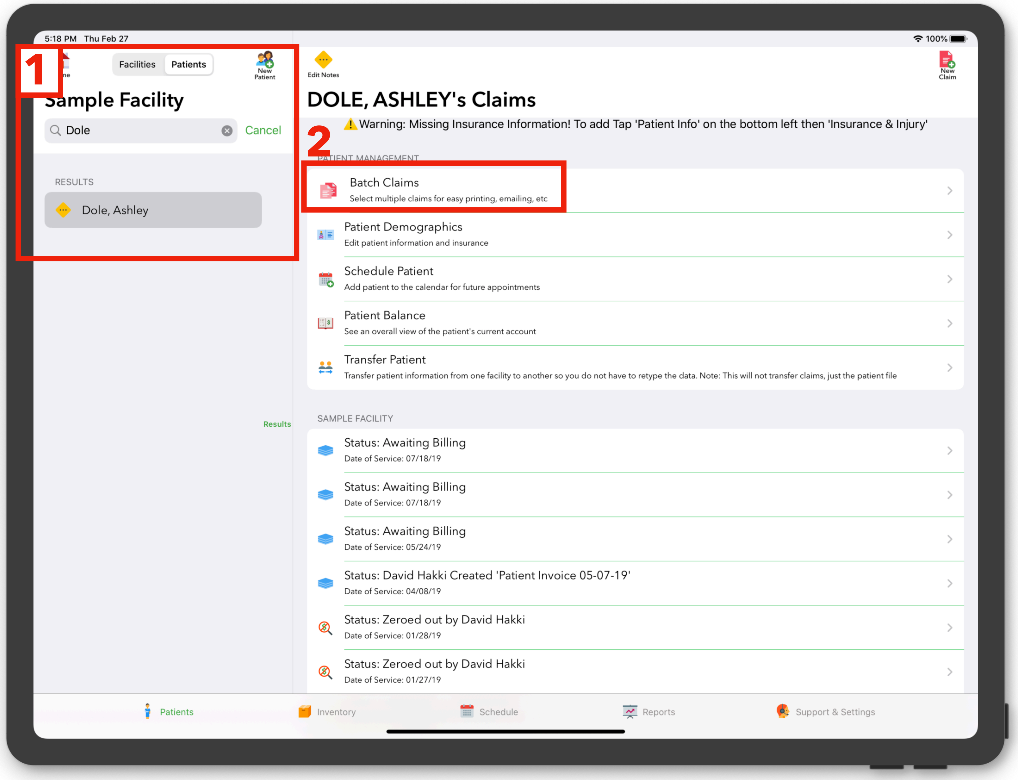
3. ADDING A PATIENT

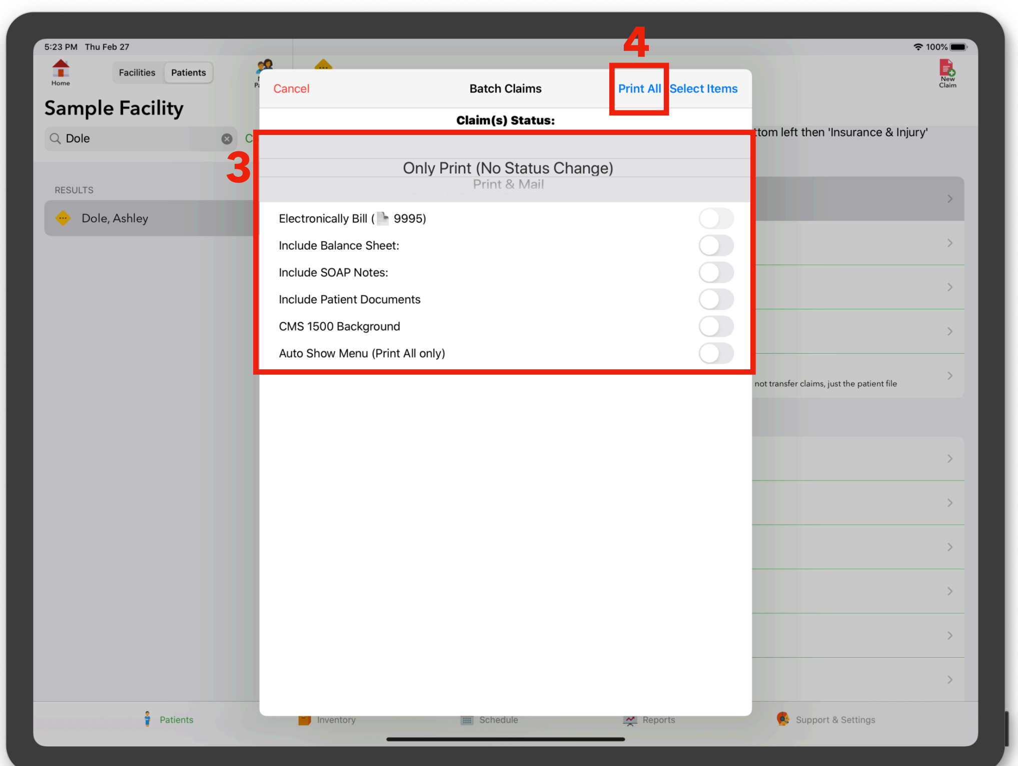
1. Highlight patients by tapping on the patients tab located at the top left hand corner near the home button.
2. Once highlighted, tap 'New Patients' located to the right, by the switch.
3. Enter the patient demographics & case information.
4. Tap the 'Save' button in the top right hand corner.

4. BATCHING CLAIMS

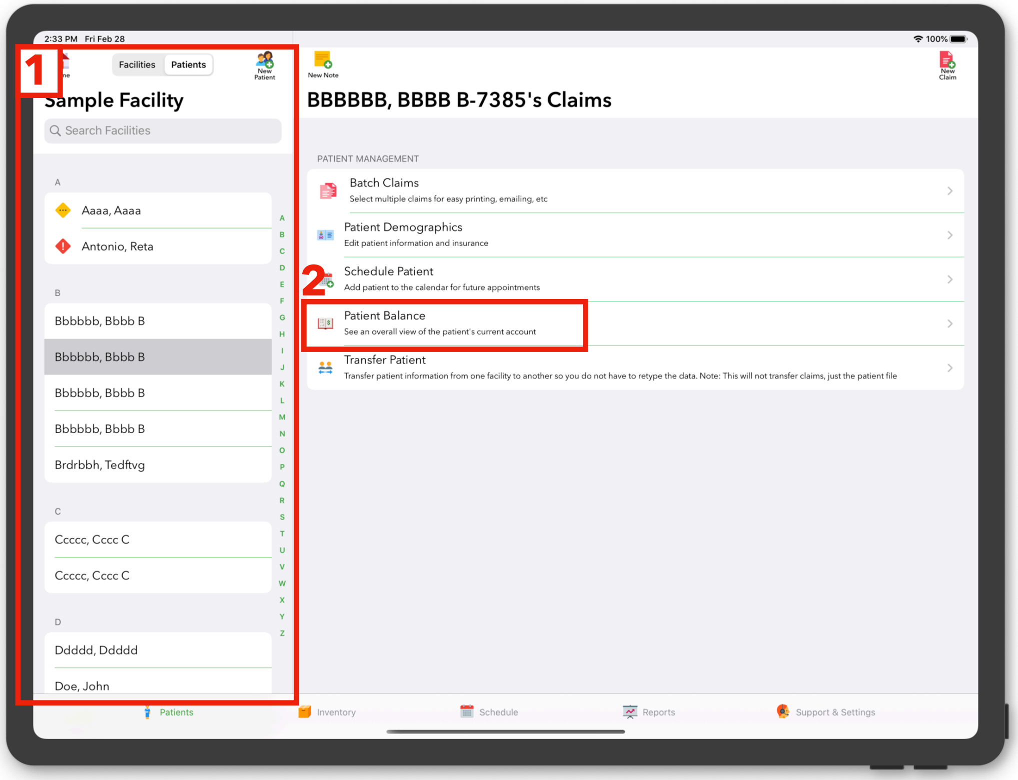
Selecting multiple claims for printing, e-mailing, or sharing.

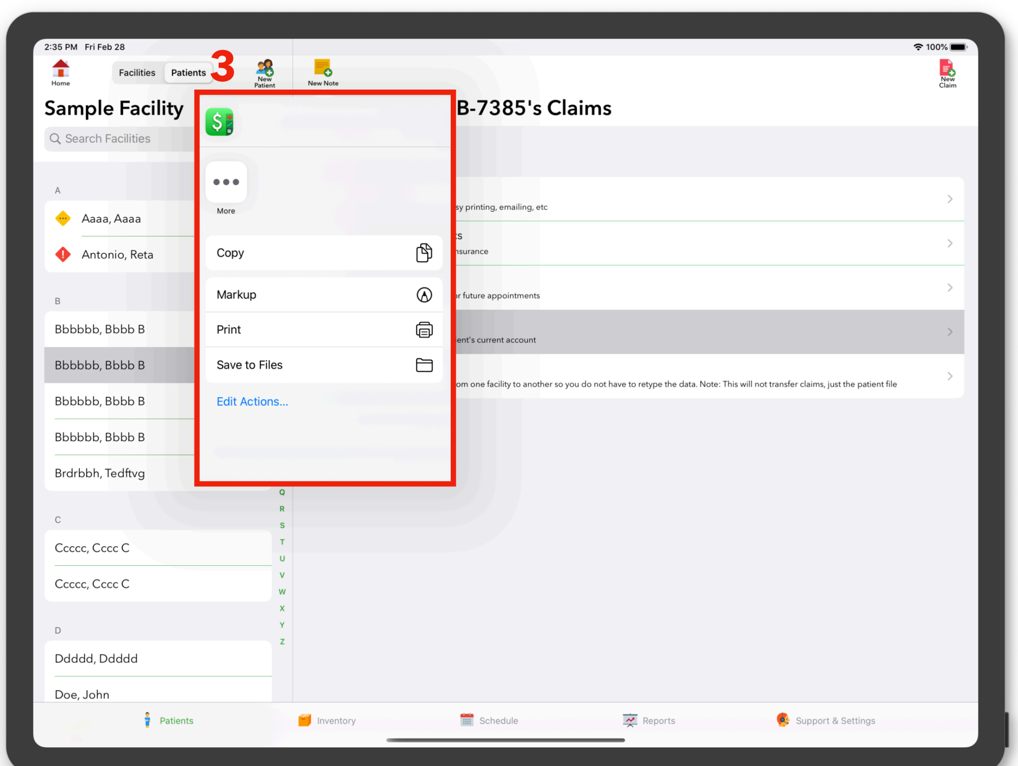
1. In the left column search for and select the patient you would like to view.
2. Then on the right hand side under patient management tap 'Batch Claims'
3. Set the claim status & documentation to be included.
4. Tap the 'Print All' in the top right hand corner to either print or send bills.



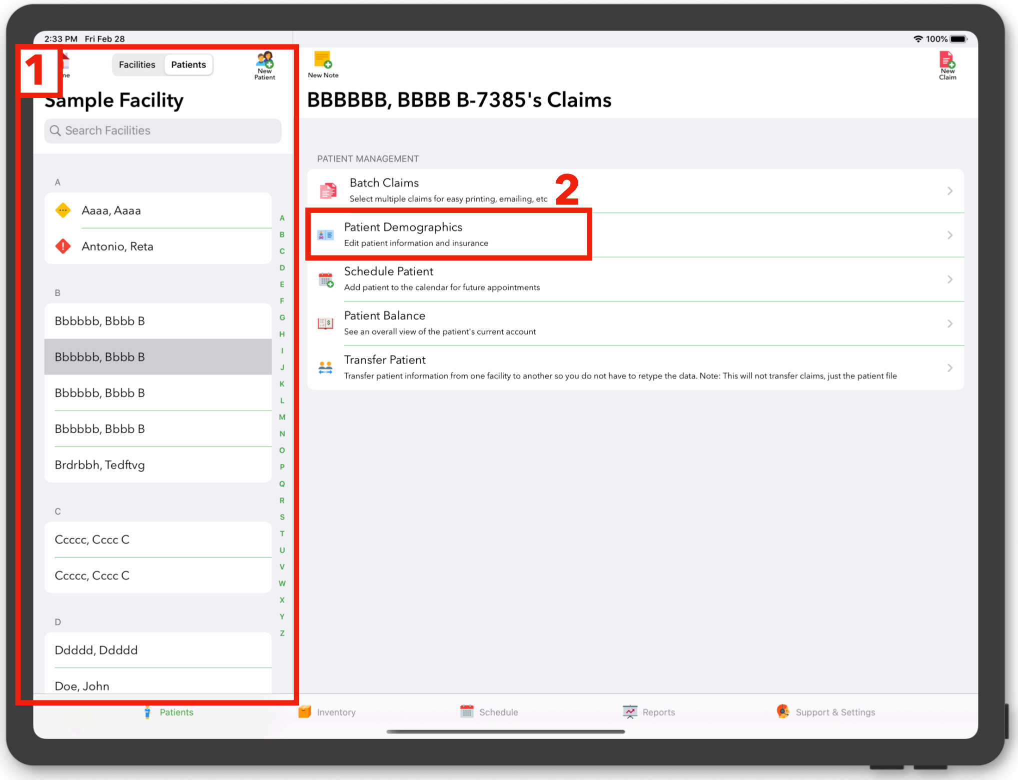


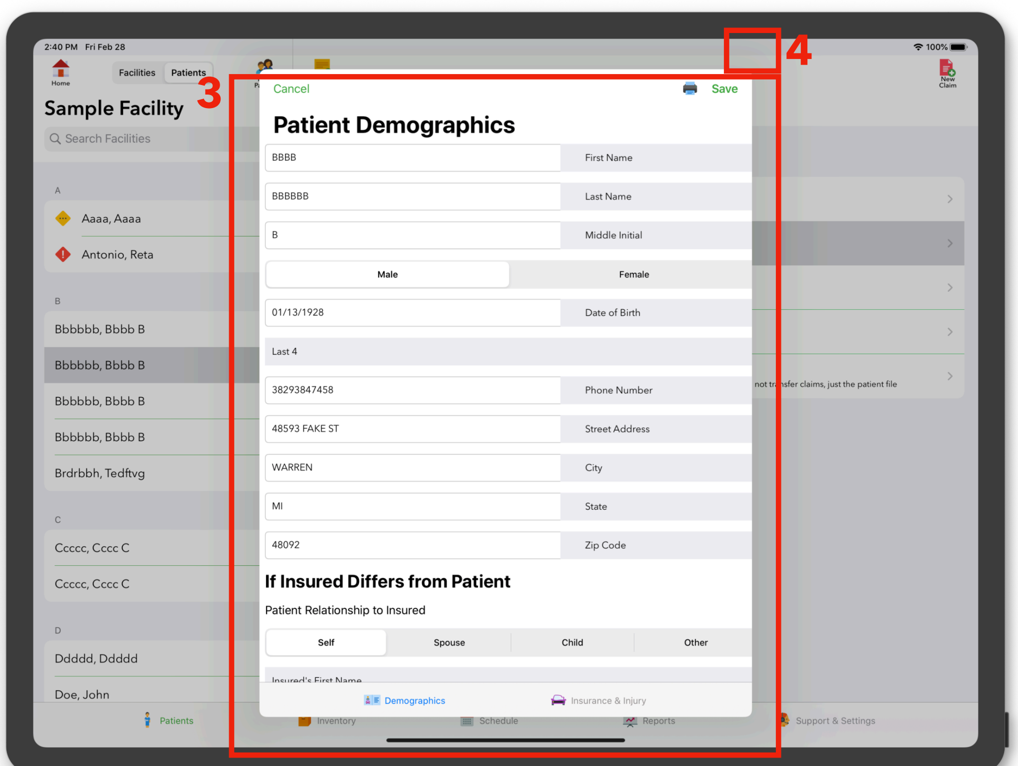
5. VIEWING PATIENT BALANCE





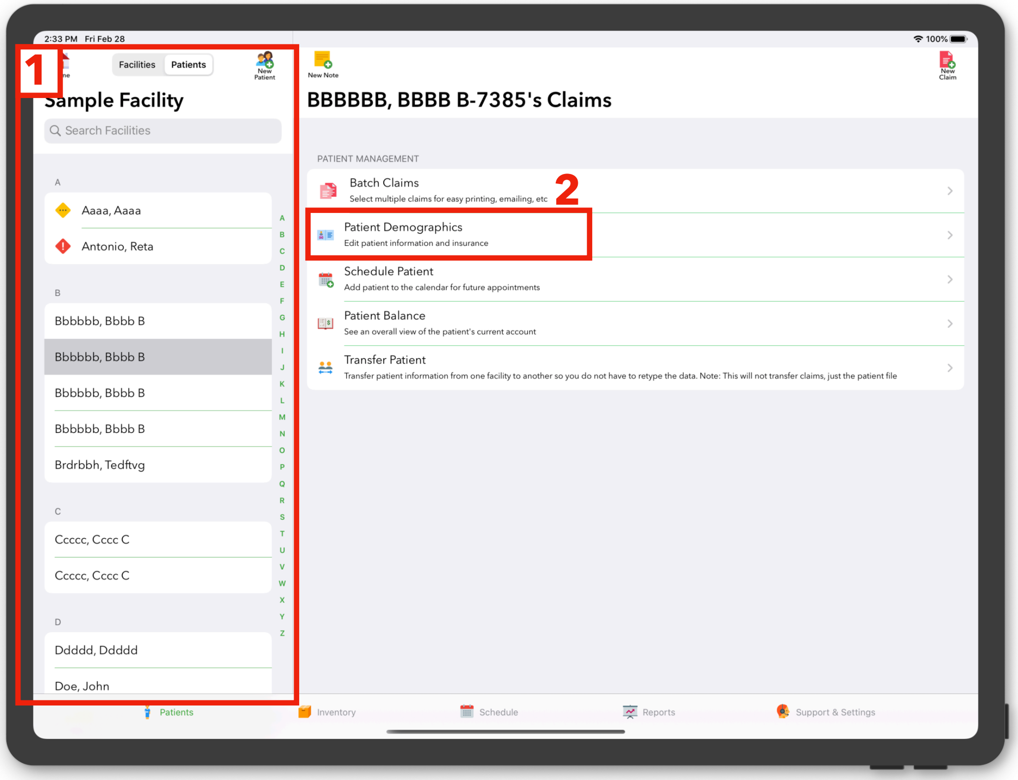
1. In the left column search for a patient you would like to view.
2. Then on the right hand side under patient management tap 'Patient Balance'.
3. Select the location of where you want the spreadsheet information go.





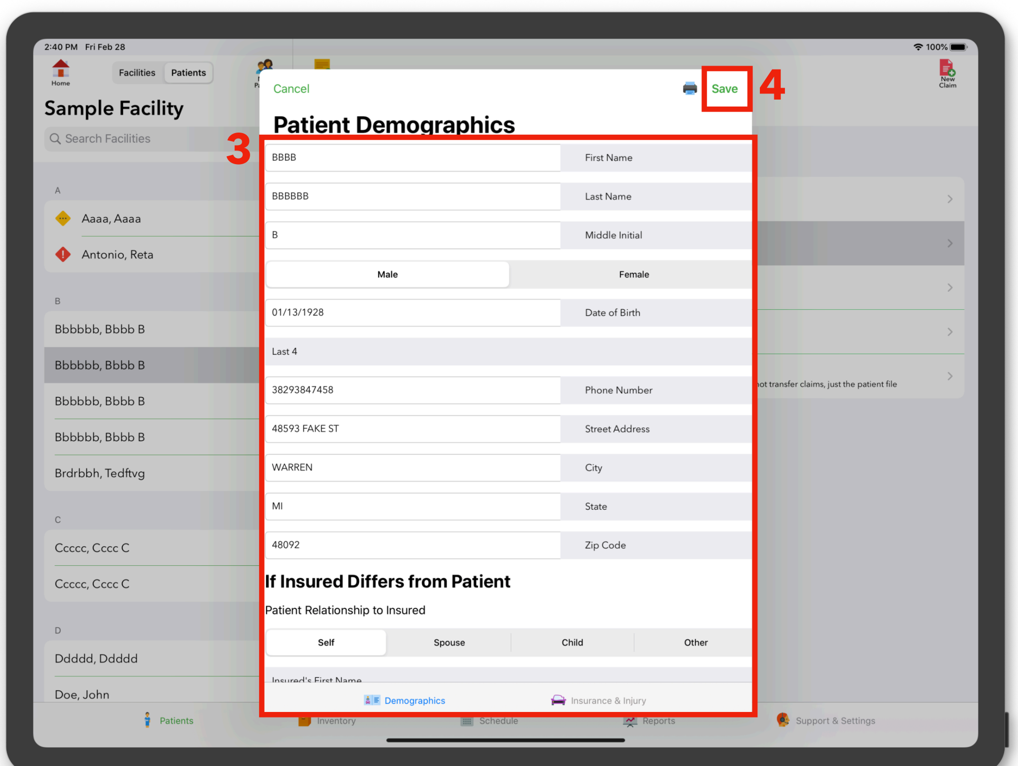
6.EDITING PATIENT/ INSURANCE INFORMATION

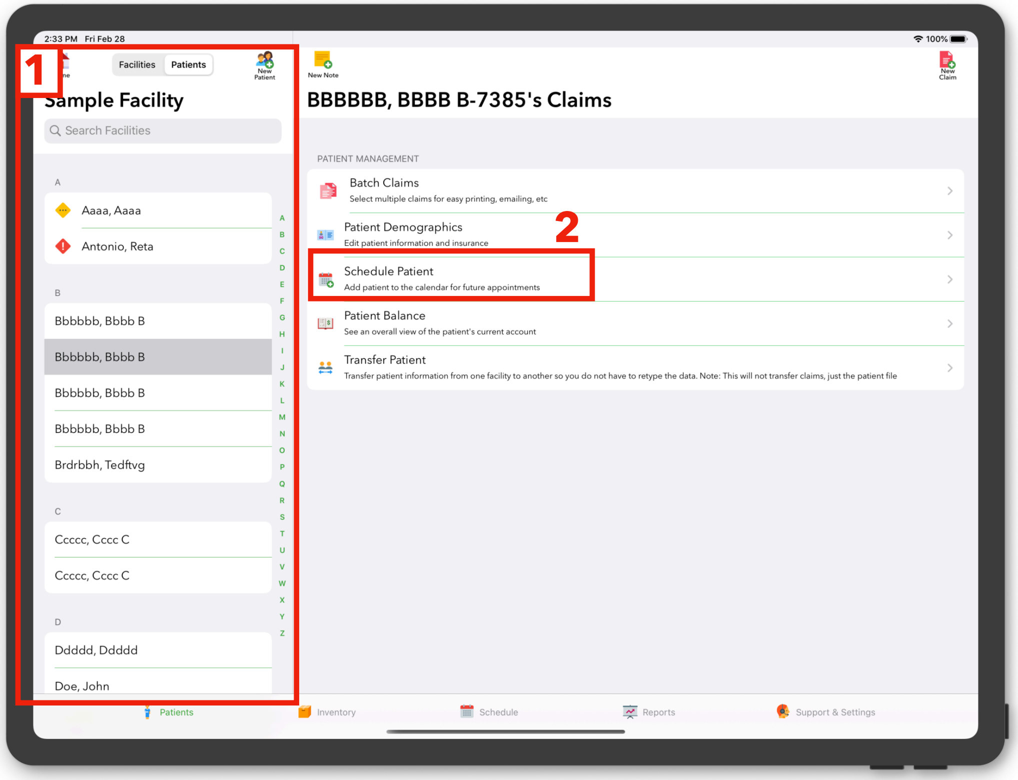
1. In the left column search for and select the patient you would like to edit.
2. Then on the right hand side under patient management tap 'Patient Demographics'
3. Make any needed changes.
4. Tap the 'Save' button in the top right hand corner.

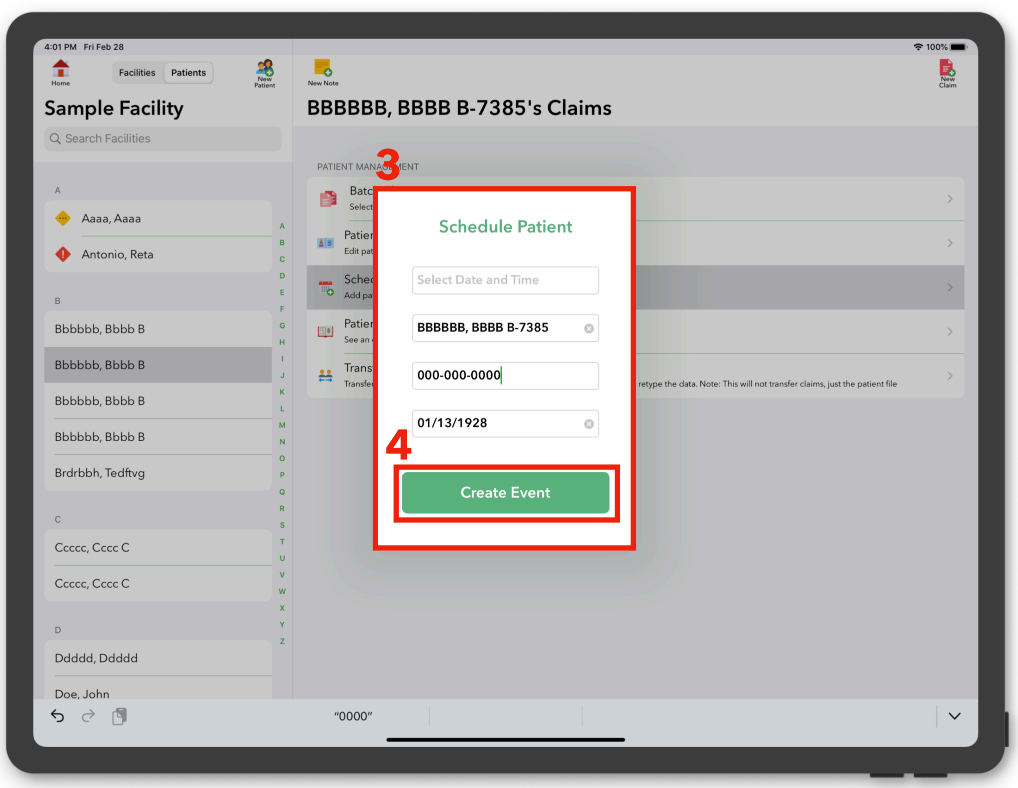


7. TRANSFER PATIENT INFORMATION

1. In the left column search for and select the patient you would like to view.
2. Then on the right hand side under patient management tap 'Transfer Patient'.
3. Scroll and select the provider for the patient to be transferred too.
4. Tap 'Transfer Patient to Selected Provider'.

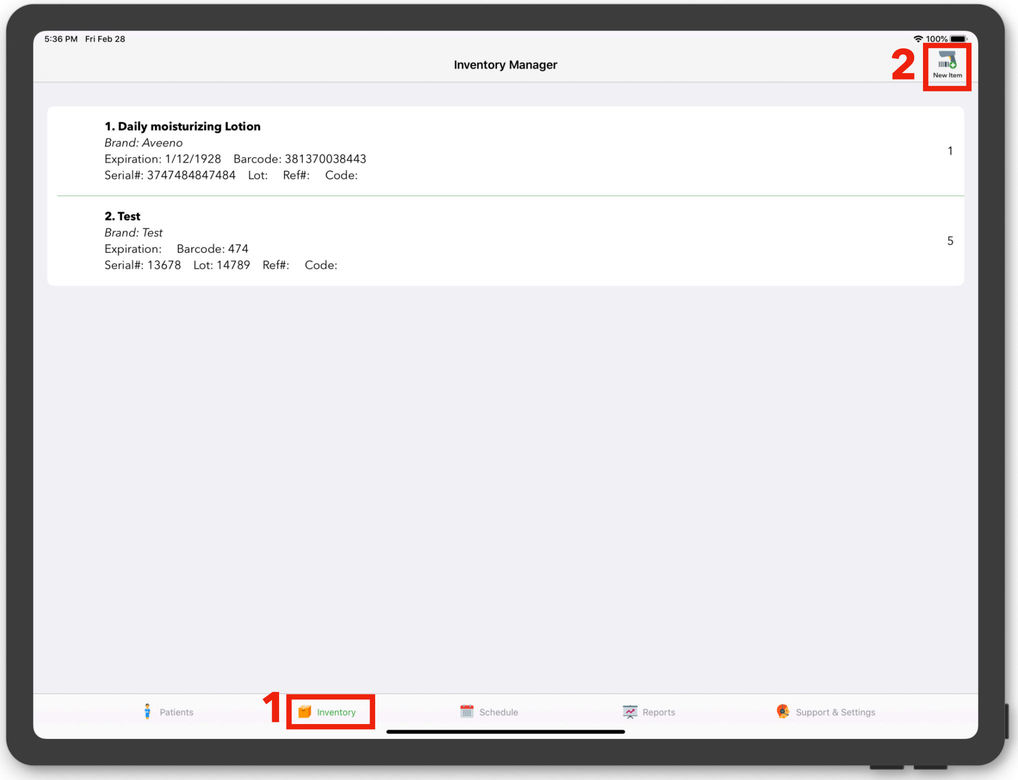


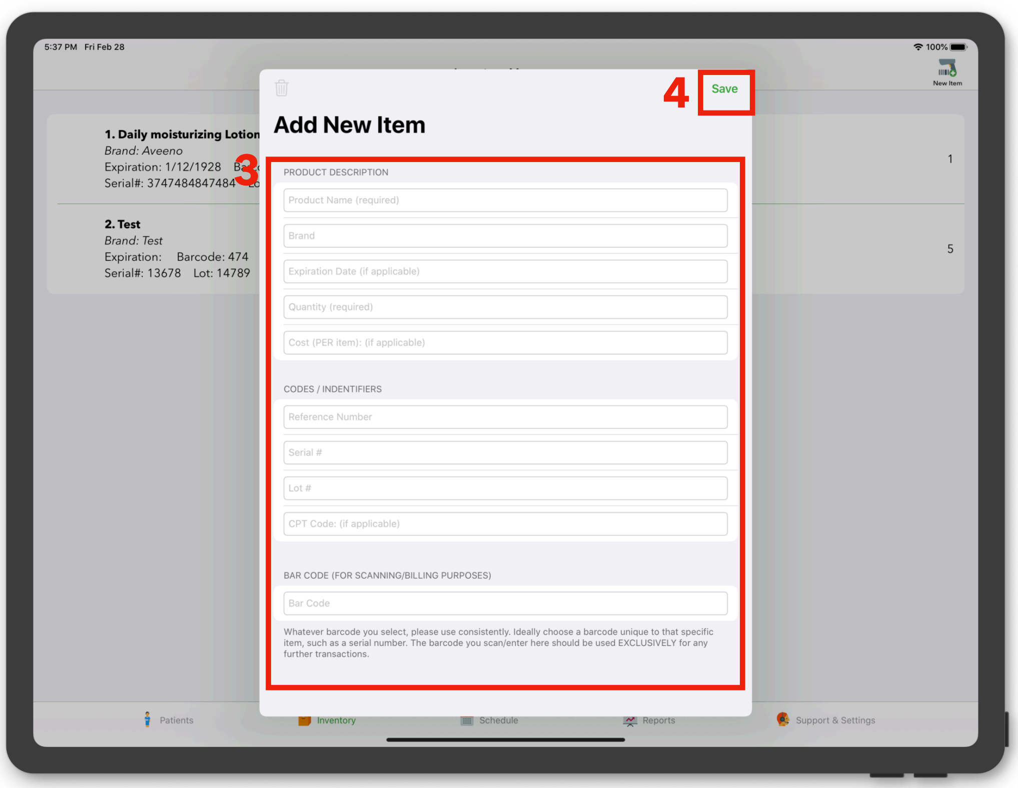




8. SCHEDULING AN APPOINTMENT

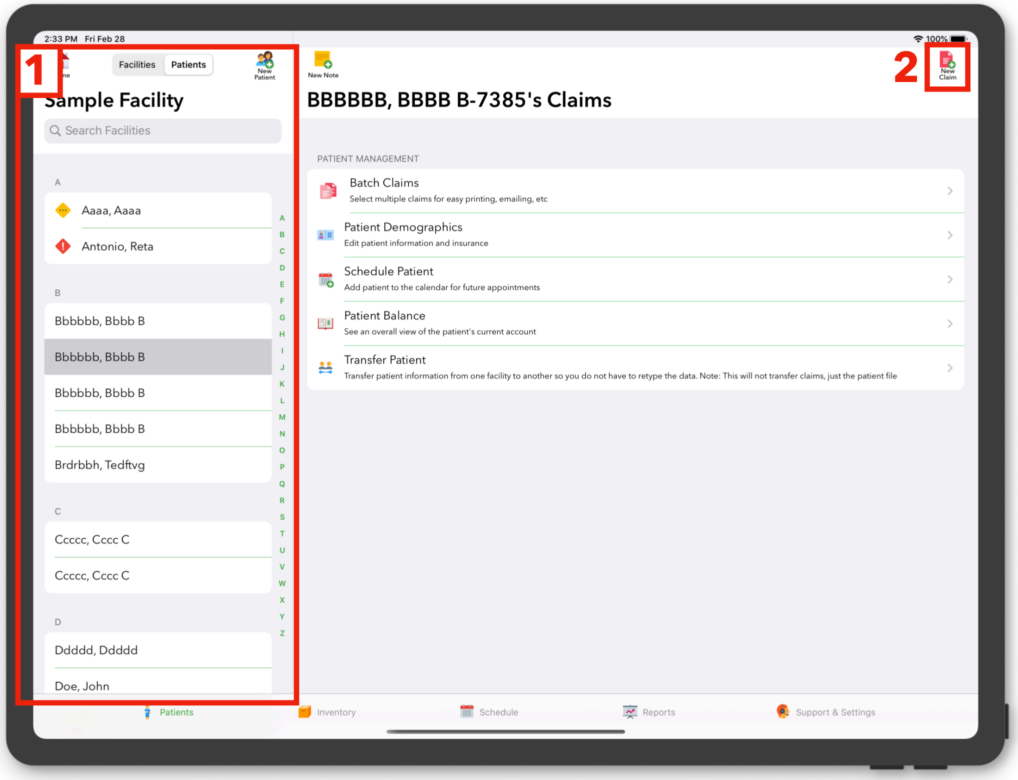
1. In the left column search and locate the patient you would like to schedule.
2. Tap on the patient being scheduled.
3. Then on the right hand side under patient management tap 'Schedule Patient'.
4. Enter the required information.
5. Tap 'Create Event'.

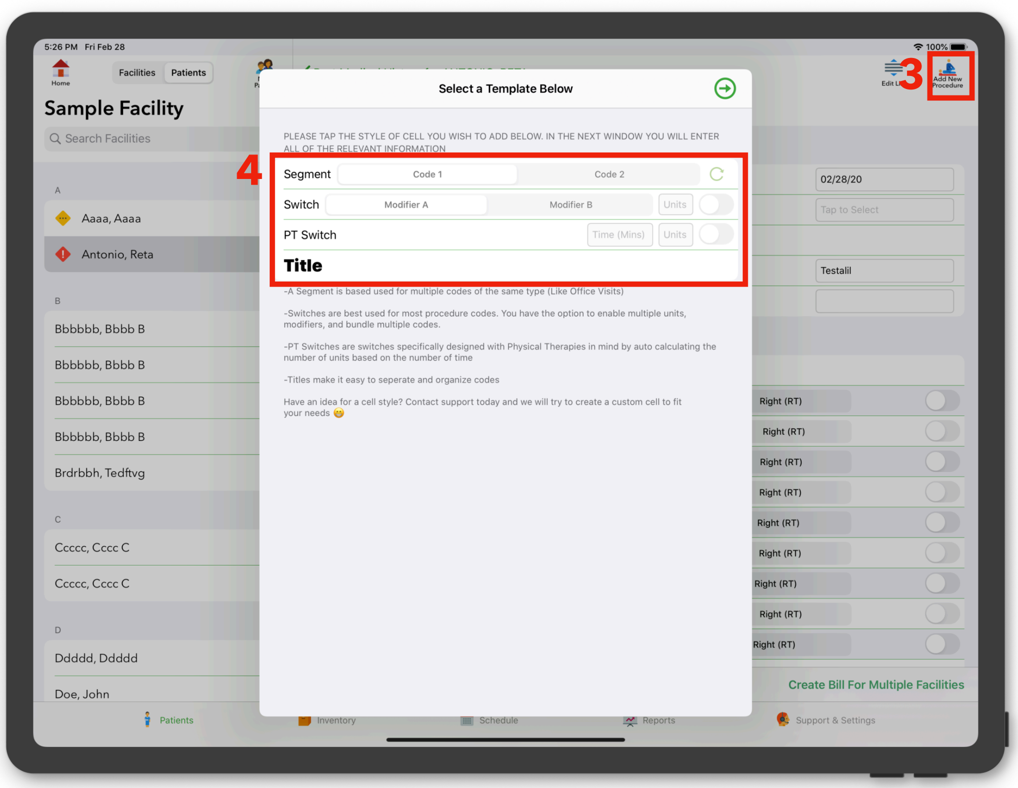




9.ADDING INVENTORY

1. Tap the ‘Inventory’ tab on the bottom of the screen.
2. Then tap the ‘New Item’ button in the top right hand corner of the screen.
3. Fill out the product information & description
4. Then tap the ‘Save’ button on the top right hand corner of the screen.





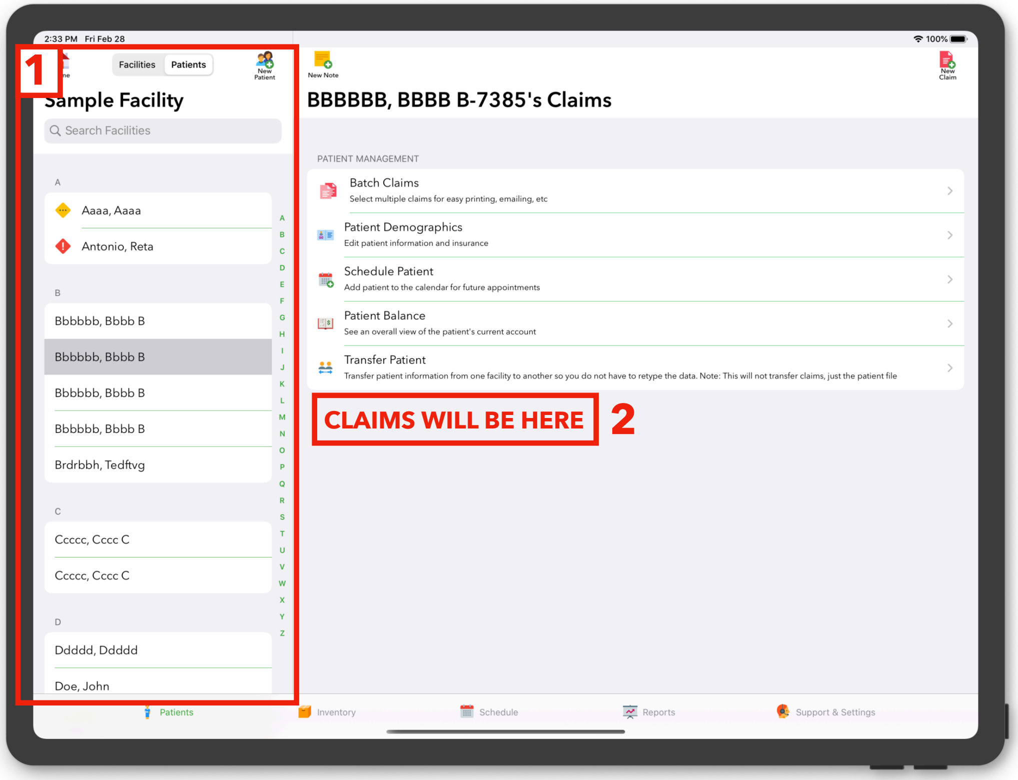
10. ADDING A NEW PROCEDURE

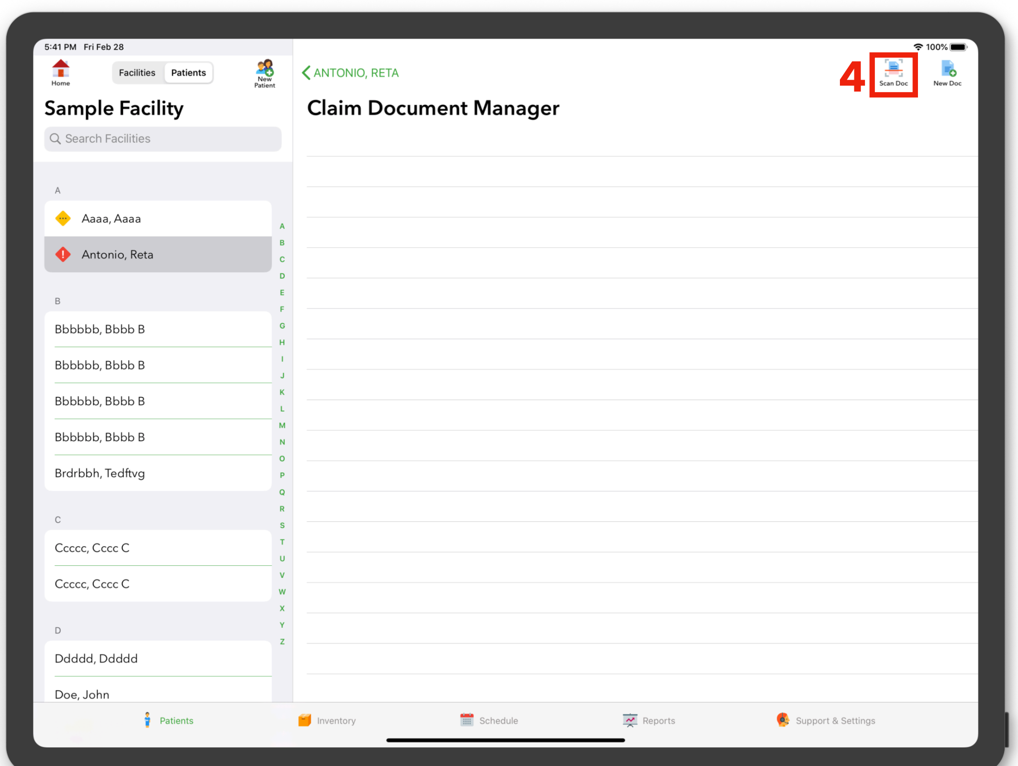
1. In the left column search for and select the patient you would like to view.
2. In the top right hand corner tap 'New Claim'.
3. In the top right hand corner tap 'Add New Procedure'
4. Select the style of segment/cell you would like to add.
   1. Segment - For codes that have the same procedure but vary in complexity. (ie - Office Visits, Evaluations, etc…) Only one code will be valid per bill.
   2. Switch - For most codes you would use this switch. A switch allows you to specify the number of units and use modifiers with a simple toggle to select the code.
   3. PT Switch - A switch more specific for physical therapy, allowing you to enter time to auto calculate the number of units.
   4. Title - Enter a title to visual separate procedures.
5. Enter the segment/cel details, the name, procedure code and price are mandatory.
   1. You can bundle codes by using a coma but you must ensure that for every code you add a come and a price as well.

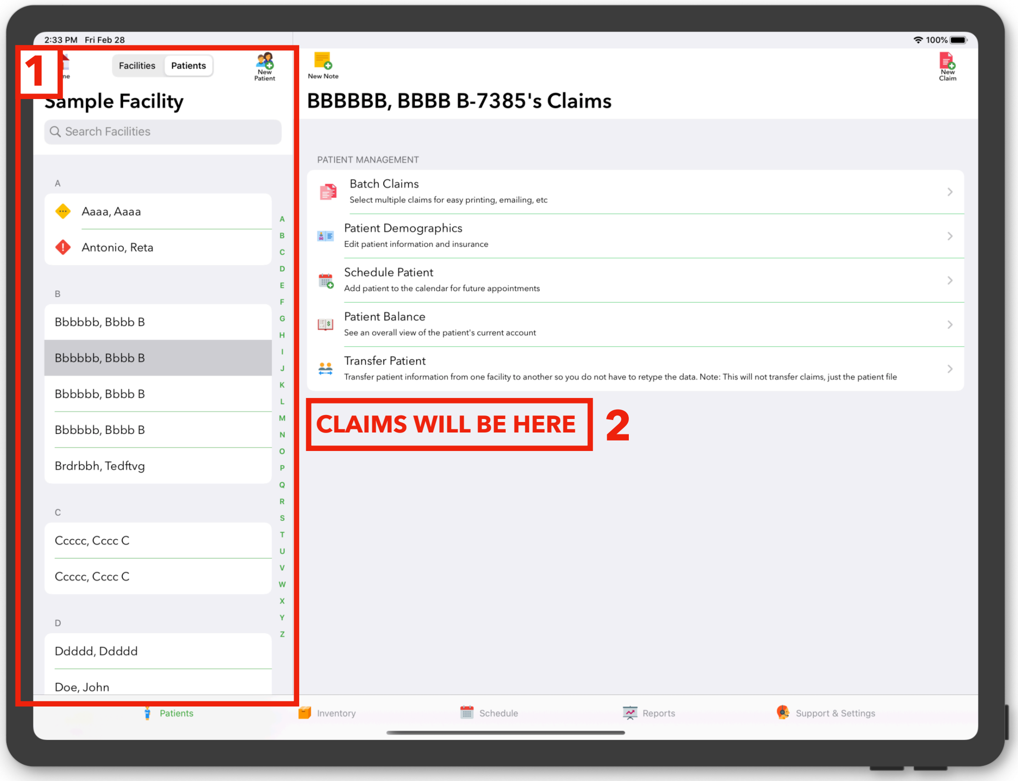
6. Tap the 'Save' button on the top right hand corner of the screen.

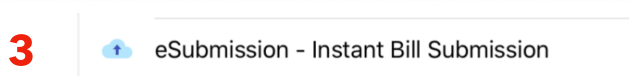
11. HOW TO SCAN PATIENT DOCUMENTS

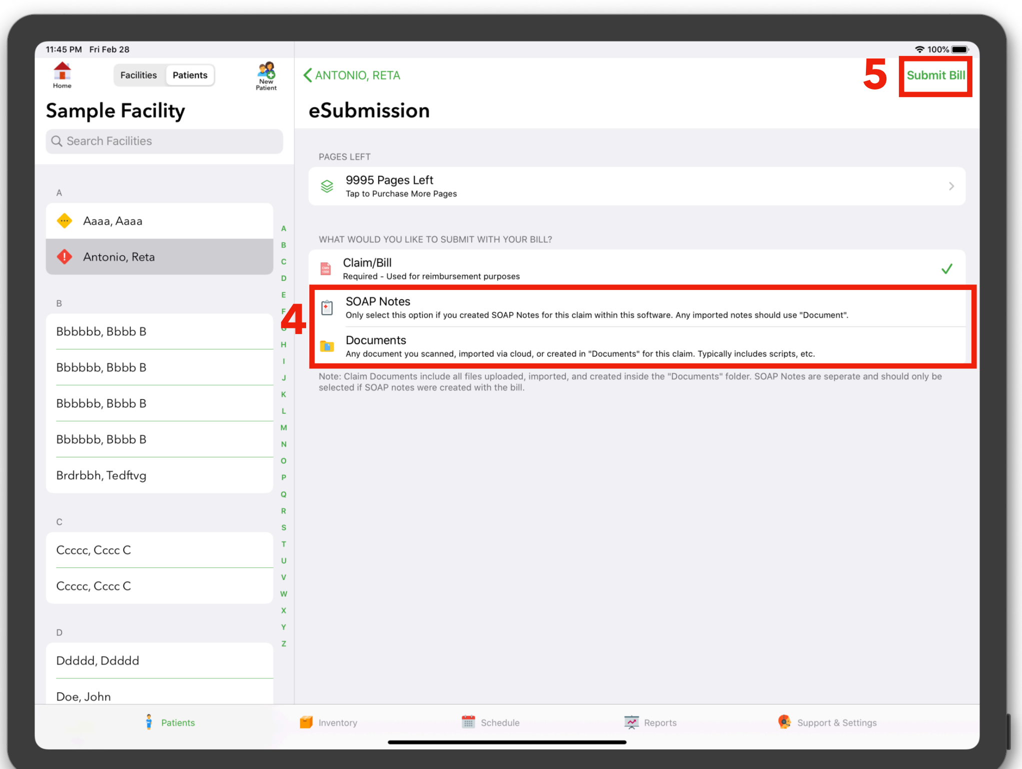
1. Tap a patient on the left side of the screen.
2. Tap a claim under a facility.
3. Under claim manager tap 'Documents'
4. Tap 'Scan Doc' on the top right hand corner.
5. Place the document under the camera to scan.





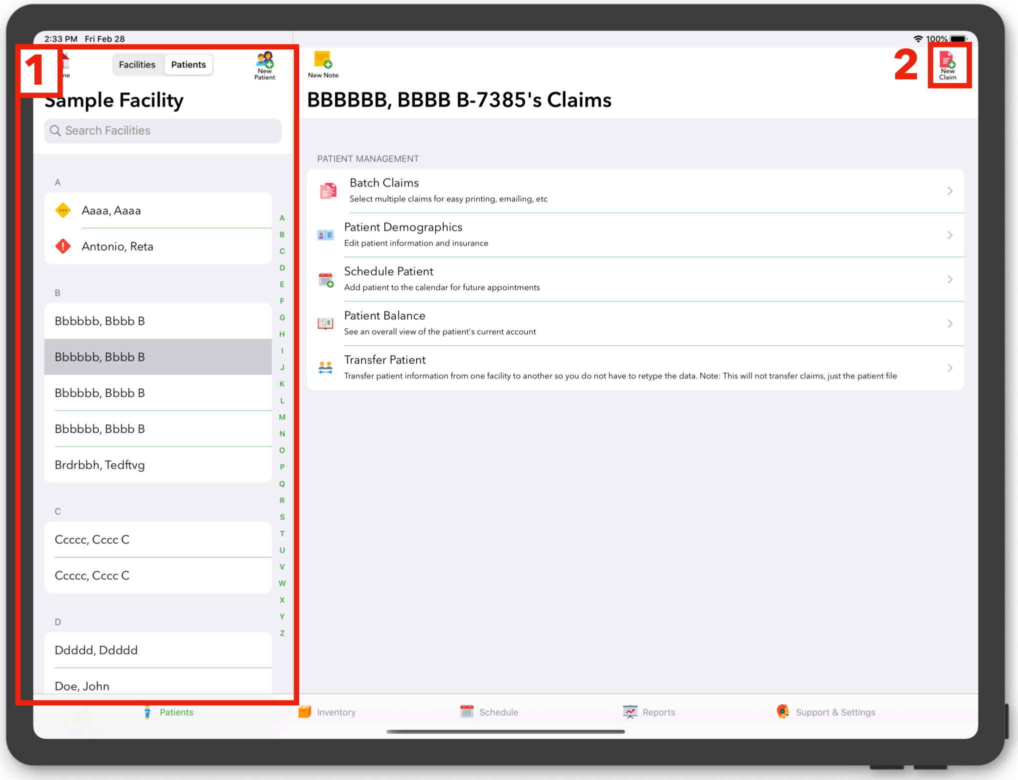






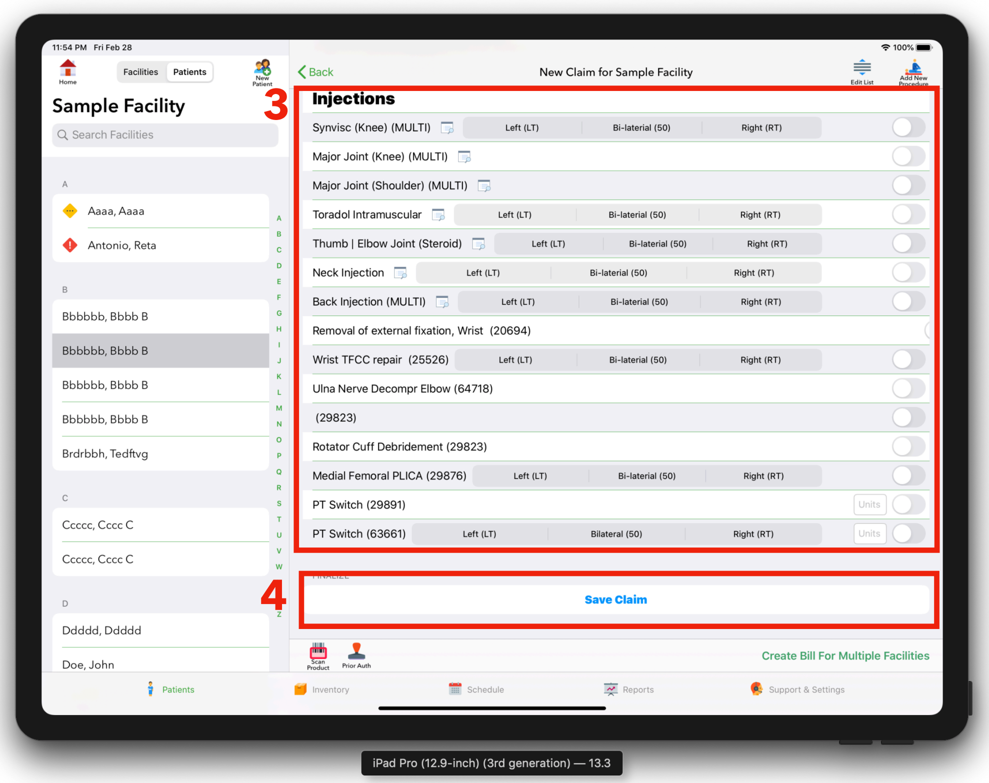
12. HOW TO E- SUBMIT BILLS

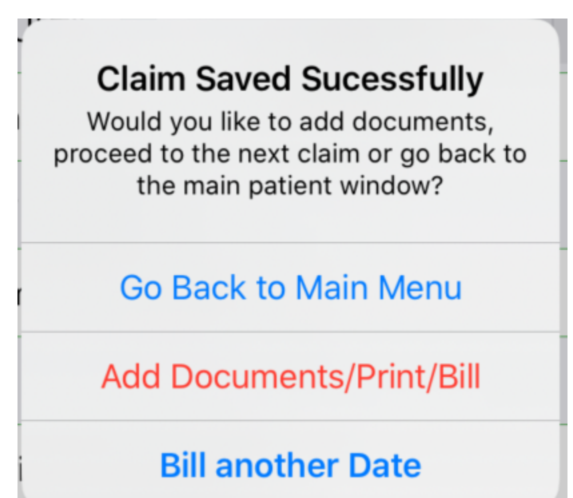
1. Tap a patient on the left side of the screen.
2. Tap a claim under a facility.
3. Tap 'eSubmission' under the billing manager.
4. Either select 'SOAP Notes' & 'Documents' if you scanned or added documents to this claim.
    1. SOAP Notes - Only select this option if you used the built-in SOAP note option.
    2. Documents - If you scanned, imported, or created for this DOS and you want it attached to the bill, select this option.
5. Tap 'Submit Bill' in the top right hand corner.

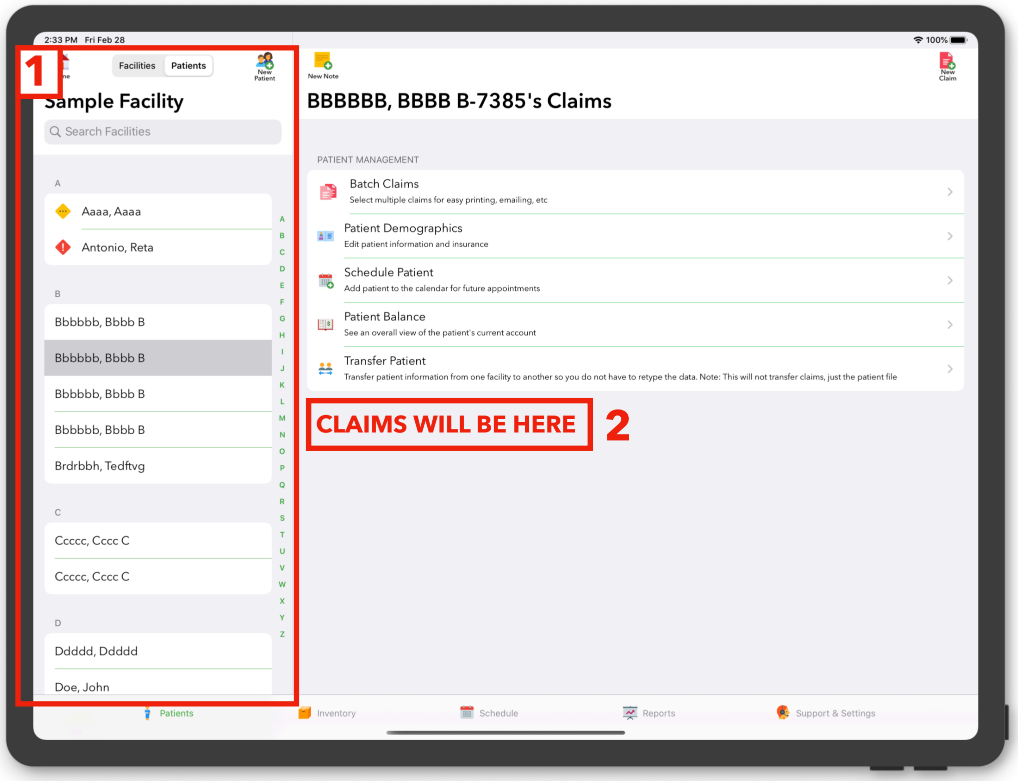


13. HOW TO CREATE CLAIMS

1. Tap a patient on the left side of the screen.
2. Tap 'New Claim' in the top right hand corner.
3. Fill out the required information.
4. Tap 'Save Claim' at the bottom of the screen.
    1. Go back to main menu - Will take you to the main patient page.
    2. Add Documents/Print/Bill - Print out bill, eSubmit or Add additional documents to the claim.
    3. Bill Another Date - Allows you to bill similar services with different dates quickly. When tapped it will present you with the exact same bill you just created, now, edit the DOS and any procedural difference then press 'Save Claim'.







14. HOW TO DELETE CLAIMS

1. Tap a patient on the left side of the screen.
2. Tap a claim under a facility.
3. Under Billing Manager, tap 'Report an issue with this claim'.
4. Then tap 'Delete Claim'.