streamline HEALTH®

Quick Guide for RevID Charge Reconciliation

StreamlineHealth.net

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Version #	Revision Date	Reason
1.0		Initial version
2.0	7/10/2023	Updated branding

TABLE OF CONTENTS

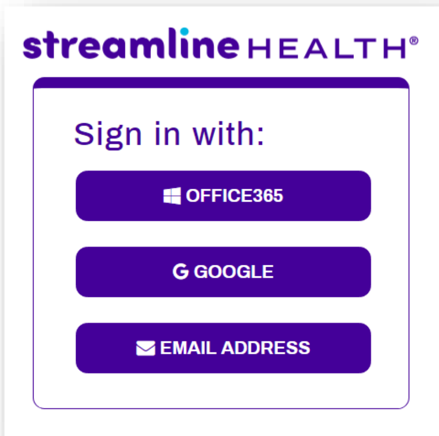
THE STREAMLINE HEALTH SUITE

WEBSITE ACCESS

Open Google Chrome or Microsoft Edge web browser and enter the following link: https://mbat.avelead.com

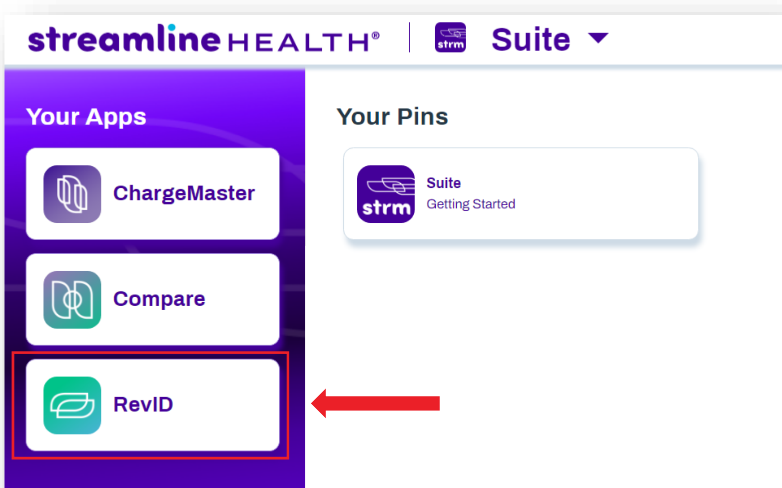
LOGIN PAGE

Depending on your platform, click on Icon at the bottom of the Sign In page. You will then be prompted to enter your Login ID (Facility Email Address) and password. For an easy user experiencee, we have integrated MBATs user authentication process with a few SSO options. This means you can access MBAT using your work credentials, if you use either Office365 or Google. For quick access, you should add this as a favorite!!



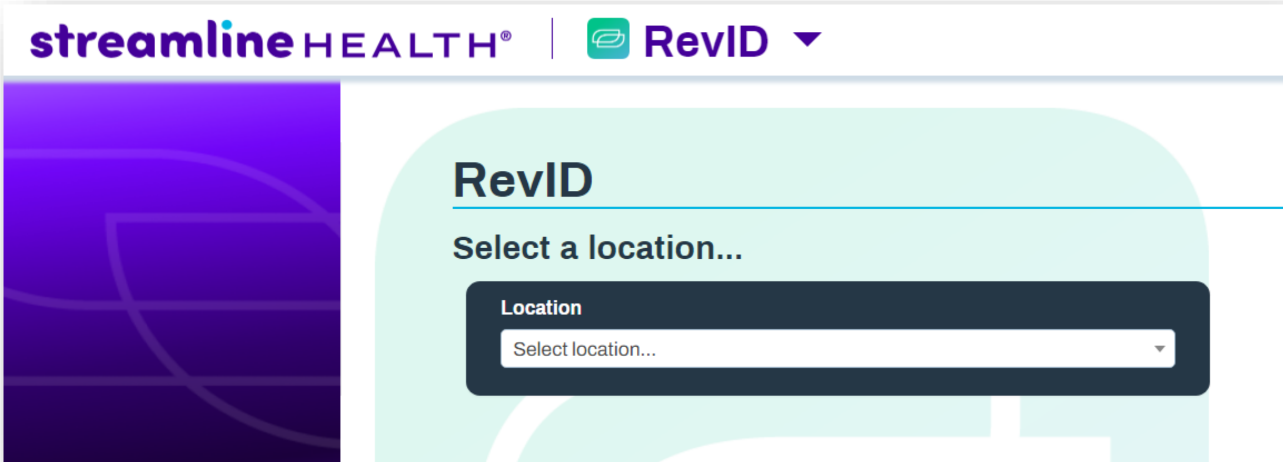
REVID APPLICATION

RevID is the application that will be used to complete your daily Charge Reconciliation and what you should select from the Streamline Health Suite homepage.



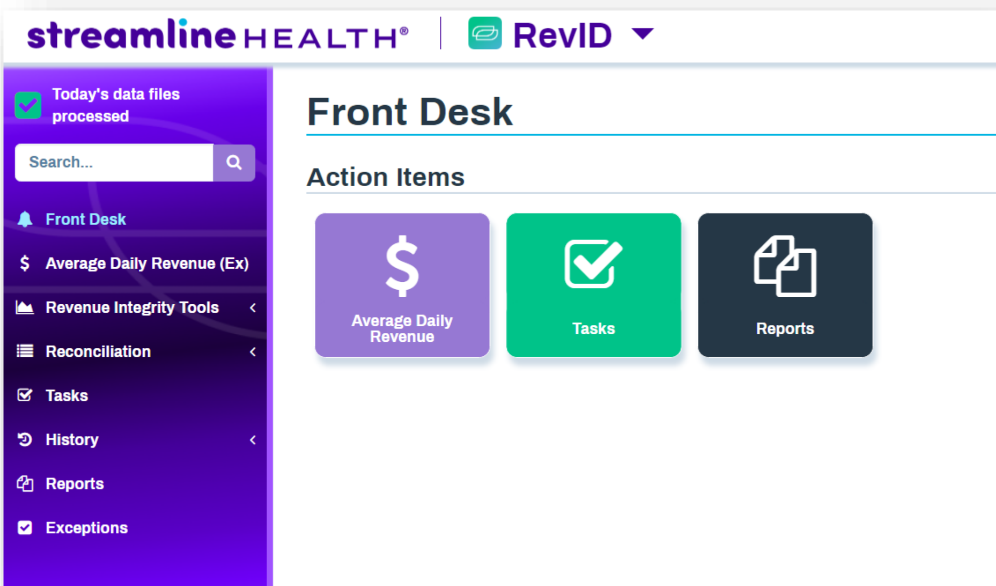
SELECT FACILITY

Select your facility from the Location drop-down.



THE FRONT DESK

The Front Desk displays the list of tools that all users have access to within RevID. A short description of what each tool does is listed below to provide better clarity on the functions of each.



Average Daily Revenue

This tool allows all users to review the monetary performance for their assigned department. Normally used at the Executive level but also available for all users.

Reconciliation

Used to complete the daily charge reconciliation for the enduser's assigned department(s) by viewing clinical events and verifying that the charge(s) posted to the clinical events are correct.

Tasks

This tool will allow users to assign a task to individuals as well as track progress to allow swift charge reconciliation within the application. Example: Documentation was not completed before mid-night. This will cause the charges to post the following day. You will assign this task accordingly and once the charge posts the task will automatically resolve.

History

A repository of all reconciliations. Can be used as a reference for previously signed off charges but is also used as an auditing tool when needed.

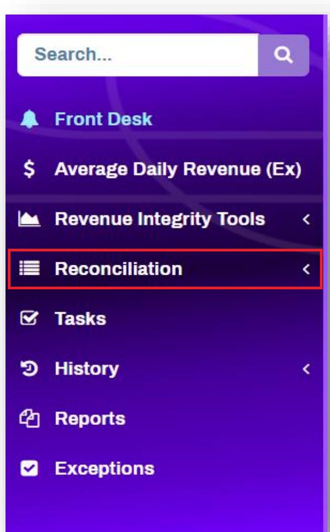
Reports

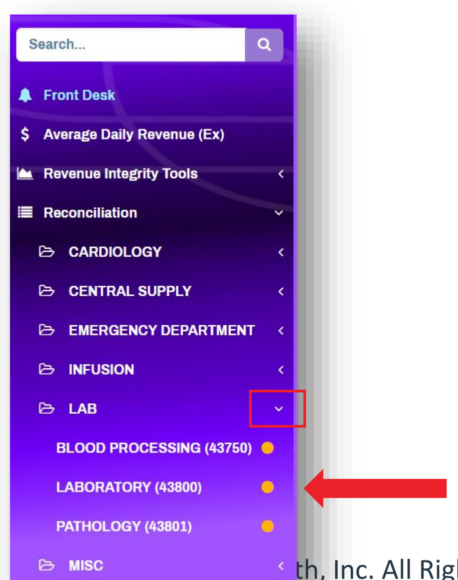
A combination of reports used by the clinical departments, revenue integrity and the executive office.

RECONCILIATION WORKFLOW

Daily charge reconciliation begins with the Reconciliation Tool!

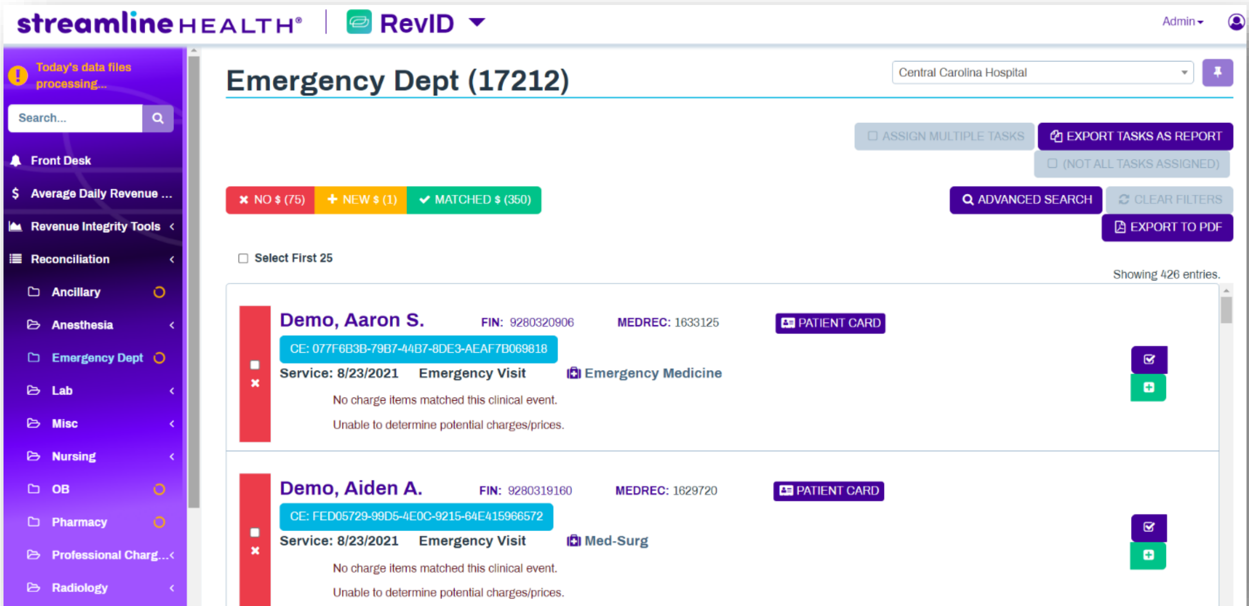
- Select **"Reconciliation"** from the list of tools on the left side of the screen.
- **Reconciliation departments**: Selecting Reconciliation reveals a drop-down list of all departments that enduser has been assigned. To display additional lines of service, click on the **"<"** to the right of the department. The orange dot means there are unreconciled charges for that department. The Enduser will only see the departments they have been given access.





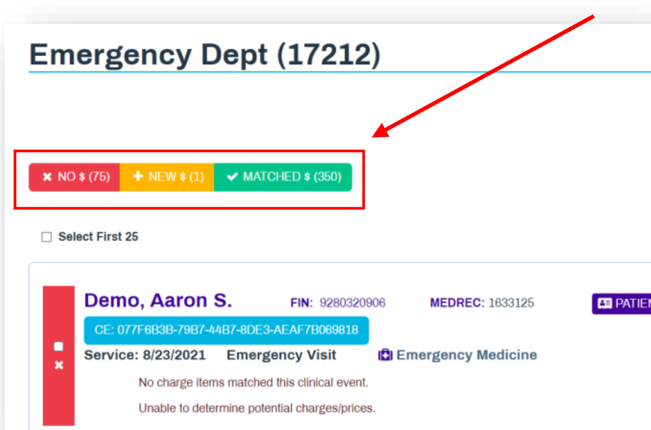
RECONCILIATION OF CLINICAL EVENTS

Clicking on a department or cost center will bring you to the reconciliation page (see screen shot below). Here you will be given a list of clinical events and posted charges for the previous day of service. In the event reconciliation is not completed daily, the enduser will be required to review and sign off on all days at the same time.



Charge Reconciliation

Signing off on daily charge reconciliation requires that each red event have a task assignment. If these parameters are not met, you will not be able to sign off. There are three colors that denote status for a clinical event.



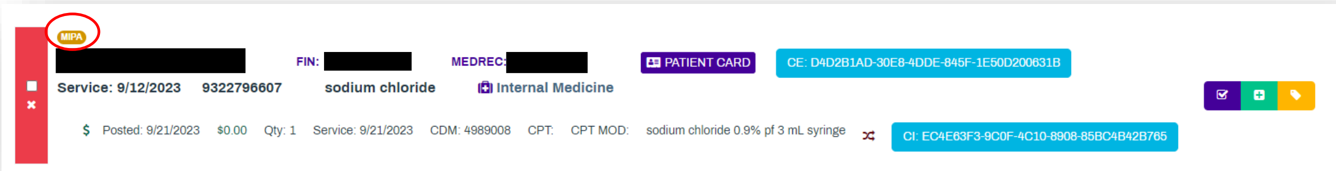
Stoplight Color Meanings

- **Red clinical events:** there are no charge items associated with the clinical event (Order or Task). You must assign a task to this event before being able to sign off. Order or task was entered prior to midnight but no corresponding charge due to not being completed. An example would be a task for Radiology that was entered at 11:30pm but was not completed until the following day.
- **Yellow clinical events:** A previous reconciled red or green event that has been modified. An example would be an event that was Red, you added a task and captured the charge. The added charge will cause the Red event to show as yellow the next day for final review.
- **Green clinical events:** At least one charge item matched to the clinical event. Green items should also be reviewed to ensure accuracy.

Different Types of Red Events

- **No charge items matched this clinical event:** The example below is an order for an exam that has not been documented as being completed in the system. In this scenario, the patient was scheduled for the test, but it has not been completed by Radiology. The order may have been placed prior to midnight but not expected to be completed until the following day. RevID recognizes this item as a RED until the order is completed and a charge is captured.

- **MIPA Icon:** Missing in Patient Account (MIPA) – Occurs only if the facility is using a third-party vendor for their financial data (Example: Cerner Clinicals and Medhost Financials). If an order is completed in the clinical application and financials does not recognize the charge, it will appear in RevID as a red task and will flag this item as a missing charge with the MIPA icon. There are three reasons a Clinical event will show as a MIPA:
    1. Timing issue. If RevID receives the interface charge before the order, you will see a Green MCE(Charge) on day one and a RED MIPA the next day(with the exception of charges coming through bridge). Review the charges to ensure that the charge did drop and resolve the Red task.
    2. Charge Code does not match. Review the charge master to ensure that the charge code in the clinical application is the same as the charge code in the financial application. Update the charge code to that the charges are dropping going forward.
    3. Invalid Account: Review the patients account to ensure charge has been applied to the correct account number.



Additional Clinical Event Icons

- **MCE:** Missing Clinical Event (MCE) – MCEs are created due to a charge captured in the clinical system that are not linked to a clinical event.
  - Example: Charge entered via Powerform
- **MIC:** Missing in Clinical (MIC) **–** MICs are created due to a charge generated without a clinical event entered the clinical system.
  - Example: Third-party charge interface or manual charge capture in the financial system.
- **TASK:** Indicates that the clinical event has been reviewed and a task has been added.
- **ALERT:** Custom alerts that can be built in the system. Example: Pharmacy wants to see all patients on a particular medication. An alert can be built so that each time that medication is dispensed pharmacy is alerted. (Optional)
- **THRESHOLD:** A "Quantity" or "Dollar" amount that has been set as a standard to give an alert if exceeded. Example: Surgery OR with a threshold of 400 minutes or a cost of $100,000.
- **INTERFACED:** Charge posted via a third party. Example: Redoc
- **HL:** Indicates a interface charge.
- **PA:** Indicates the charge was posted via the patient accounting system.

Task Assignment

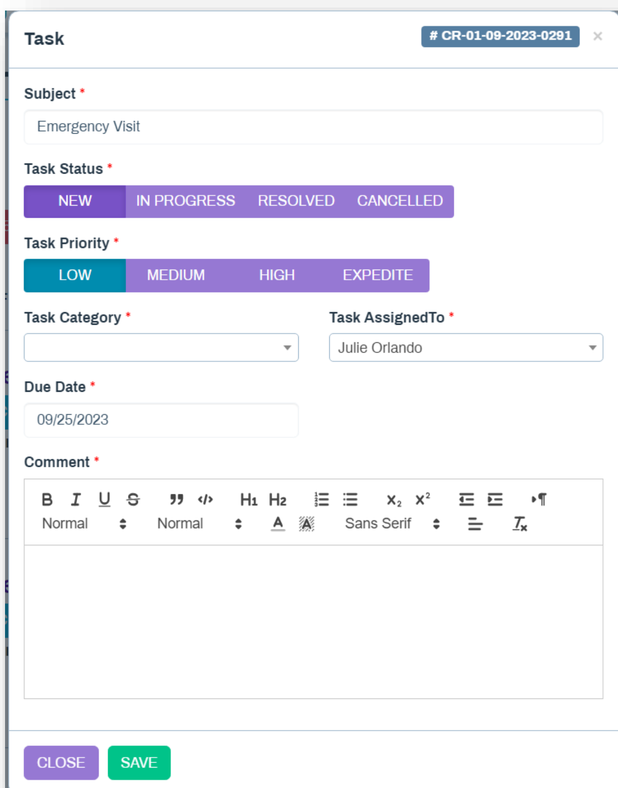
Assigning a Task:

REMEMBER, ALL RED EVENTS REQUIRE A TASK ASSIGNMENT BEFORE YOU CAN SIGN OFF ON YOUR DAILY CHARGE RECONCILIATION. There are two ways to add a task to a Clinical Event - individually or by using the "Assign Multiple Task" function. Click on the Task Icon at the end of each task.

Tasks Form

Every field on this form must be completed.

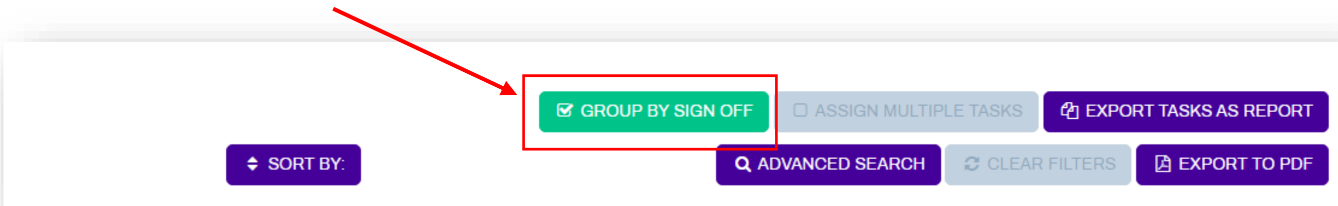
- The **subject** will automatically populate when assigning a single task.
- **Task status** can be assigned as follows:
  - **NEW:** Task created but no research has been completed to identify issue.
  - **IN PROGRESS:** A task that is in progress is a task that is missing a charge in patient accounting but is in process of being completed. Example: XR that has not been completed but on the schedule for the current day. In Progress Will auto resolve when the new charge has been processed.
  - **RESOLVED:** Task that have been resolved and require no further follow up.
  - **CANCELLED:** Order was cancelled prior to being performed.
- **Task Priority** will default to low unless changed.
- **Task Category** must be chosen from the dropdown menu. The list is customizable by facility.
- **Task Assigned To:** You can assign the task to yourself or someone else (must have access to RevID)
- The **Date** defaults to the date the task was assigned.
- And give a detailed **Comment** regarding the action taken/resolution of the clinical event.
- Once all information has been completed, Click **SAVE**.



Sign-off

Group By Sign Off

Group by signoff is only available at a director level role assignment. This option is available, at the top right of the screen, only after all Red items have tasks assigned to them.



Click the box and the Sign off/ Signature for your electronic Signature.

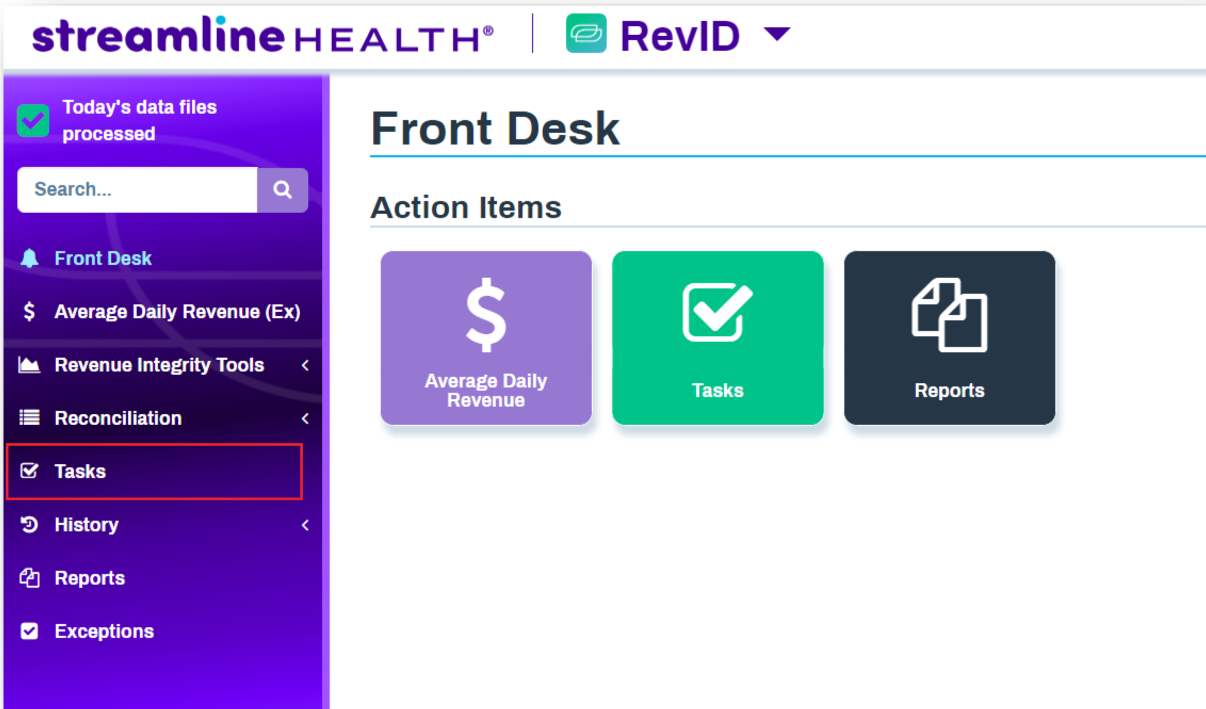
Click Continue to confirm

!!You have completed your Charge Reconciliation!!

TASK LIST

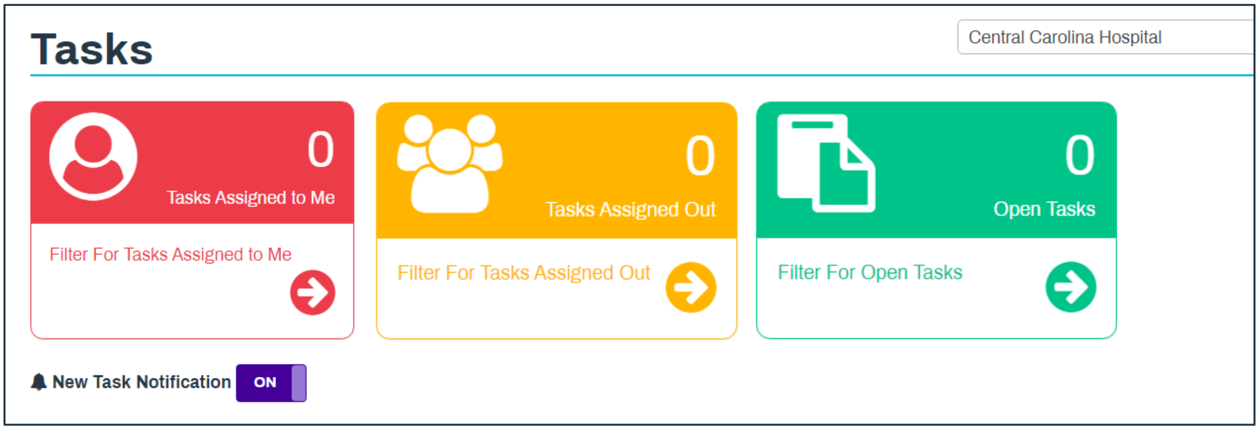
Tasks are Red clinical events that the enduser has marked with a **NEW** or **IN PROGRESS** status and needs to be reviewed. To access them, click on "**Tasks"** from the list of tools on the left side of the Front Desk screen.

TASK TYPES



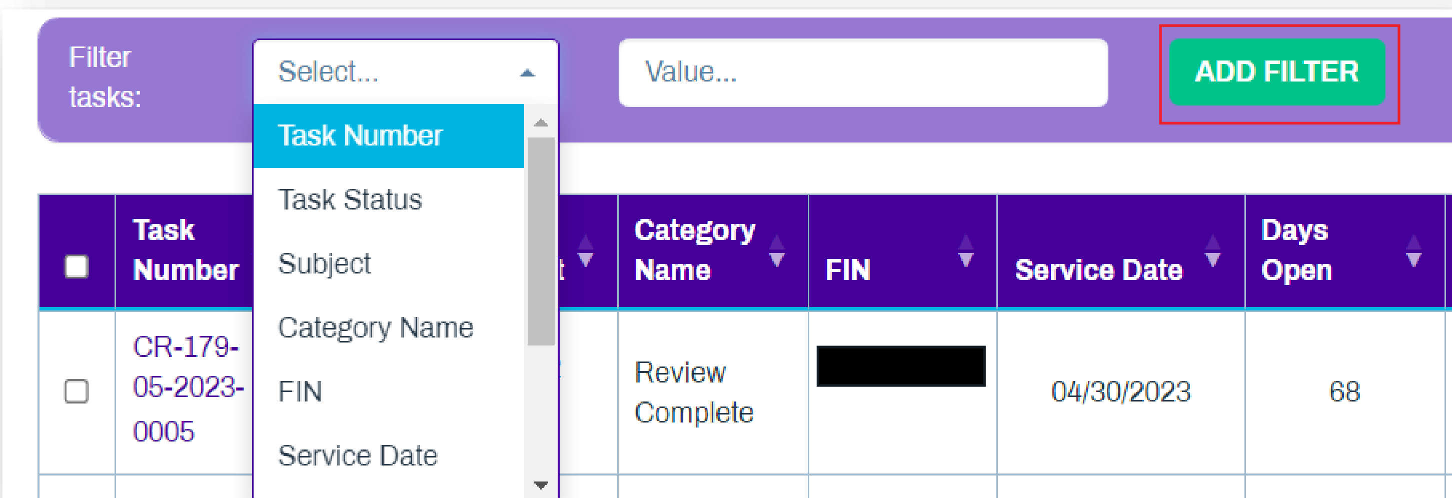
By default, each filter will be populated by the oldest records first:

1. Tasks Assigned to Me (in Red)
    a. To see tasks that are **assigned** to you
    b. These records will have the Task Status of **New** or **In Progress**
2. Tasks Assigned Out (in Yellow)
    a. To see tasks that are **created** by you
    b. These records will have the Task Status of **New** or **In Progress**
3. All Tasks (in Green)
    a. To see **all** tasks that you can view, based on the cost centers you have access to.



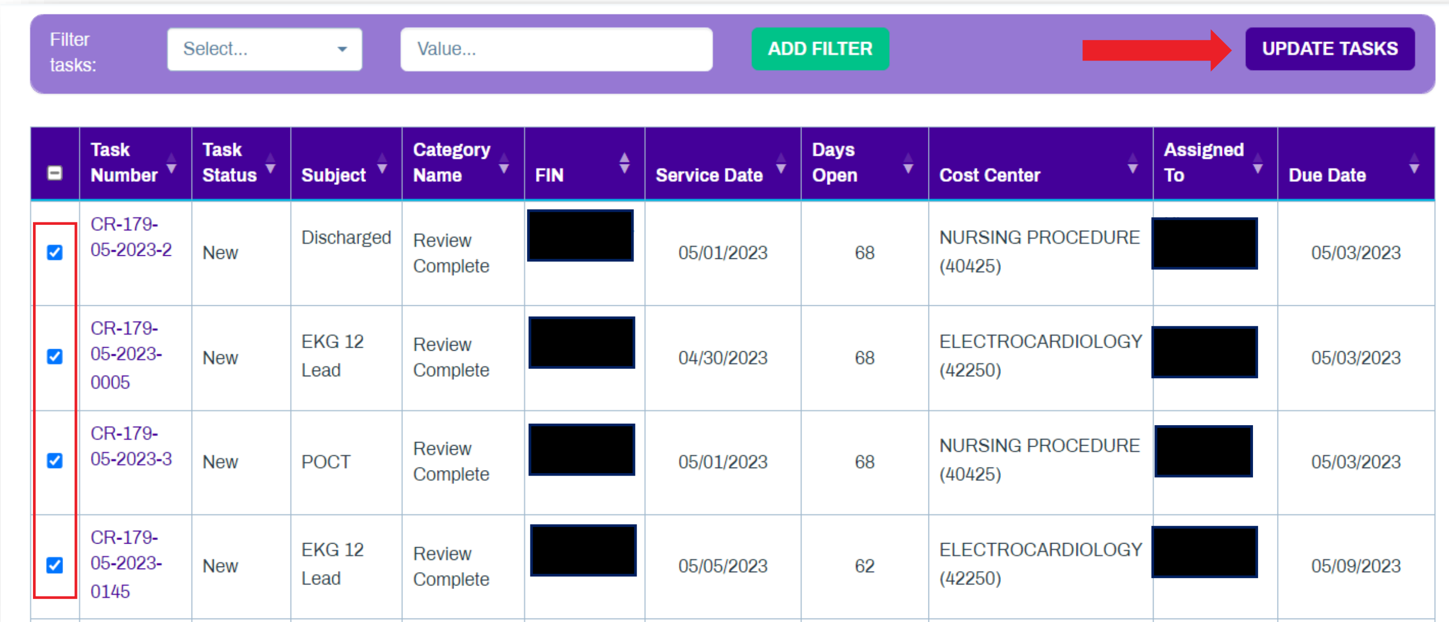
FILTERING TASKS

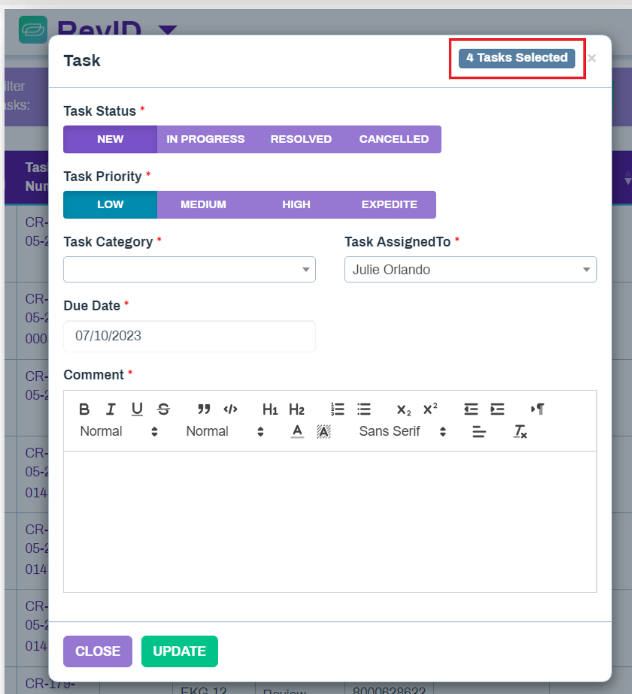
To filter the result set, first click the search box and select your desired search criteria. In the example below using **"TASK NUMBER"** from the dropdown, you would enter the last four digits of the task number in the Value field and click on "ADD FILTER" to return your search results.



UPDATE TASKS

To update multiple tasks at a time, select the tasks to the left, and then click the "Update Tasks" button that opens a dialog box.

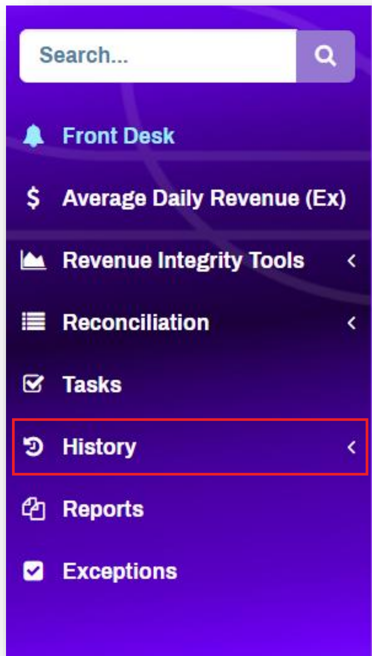




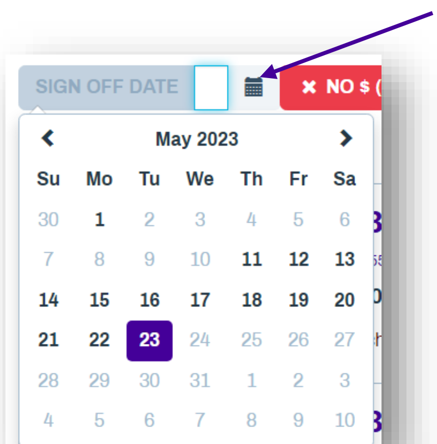
After you fill in the appropriate information in the dialog box, click "UPDATE" and a "Success!" message will appear.

HISTORY

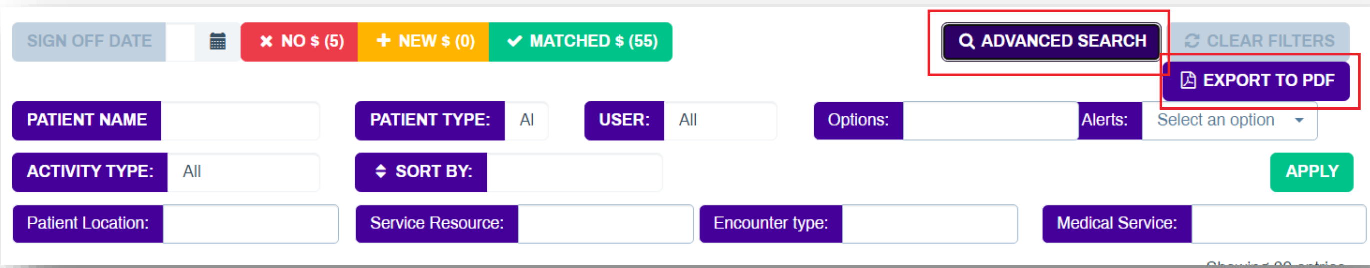
The History, or audit, tool allows users to view past clinical events that have been signed off for auditing use. To access, click on History from the left side of the Front Desk and select the cost center to be reviewed.



The History window will open and defaults to the last day that the department was signed off. To search a previous date, click on the calendar in the top left of the screen and select the day in question.



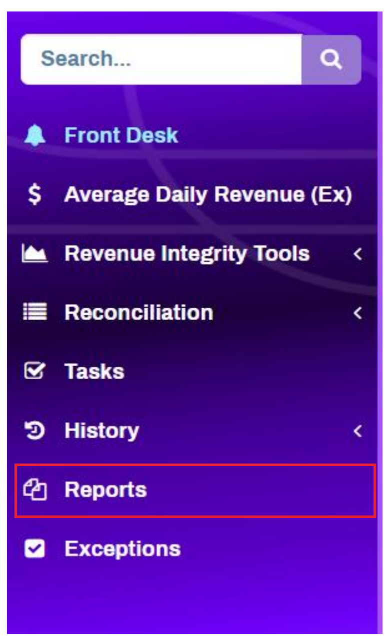
To Filter down to find a particular patient, patient type, user, activity type, etc., you can use the advanced search option. Enter your search criteria and click on "Apply". From here, you can export your executed search to a PDF report, by selecting "Export to PDF".



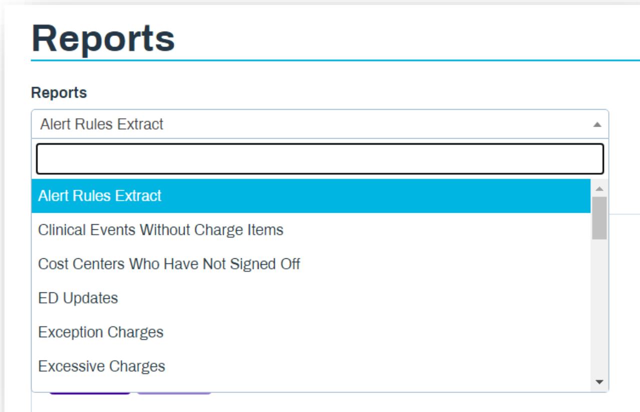
The report will populate in a PDF form and will be stamped with the Facility name, Name of Enduser that signed off, Date, and Time. For auditing purposes this report should be downloaded and emailed to the individual requesting the report for auditing.

REPORTS

Allows endusers to download reports based on a date range that can select, customize, and download in Excel format. Select Reports from the left-hand side of the Front Desk.



Select the required report. Choose the report type and posted date, then click "Submit". This will download and excel report and can be downloaded to your PC.



CUSTOMIZED REPORTS

You can also customize your reports! Each report that contains a **Customize** option can be saved. This allows users to edit the columns that will be displayed in excel. To create and save a custom report:

1. Navigate to MBAT > RevID > Facility > Reports
2. Select a Report to create.
3. Click the yellow Customize button on the right. Click New.
4. Enter a Template Name.
5. Select a Report Format.
6. Select and move the report Elements from the list.

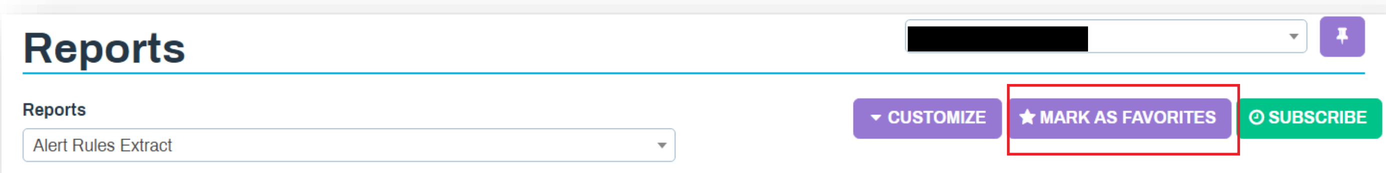
Element List: This is the list of elements not included in the excel report.

Selected List: This is the list of elements that will be included in the excel download.

FAVORITE REPORTS

Report users can mark frequently used reports as Favorites. This feature moves reports, marked as favorite, to the top of the reports drop-down list. To tag a favorite report:

1. Navigate to the MBAT > RevID > *Facility* > Reports
2. Select a report from the drop-down list.
3. Click the yellow **Mark as Favorite** button on the right.



SUBSCRIBE

Users can subscribe to reports. This feature eliminates the need for the user to manually create the report as needed. To subscribe and create a report delivery time:

1. Navigate to MBAT > RevID >*Facility* > Reports.
2. Select an eligible report from the drop-down menu.
3. Click the green **Subscribe** button on the right.
4. Click the clock to enter a **Schedule Date Time** (Central Time).
5. Click the box next to the **Day(s)** you wish to receive the report.
6. Click the box next to the **Facility** you wish to receive the report for.
7. Click the blue **Subscribe** button.