streamline HEALTH®

RevID Charge Reconciliation Reference Guide

streamlineHEALTH®

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Version #	Revision Date	Reason
1.0		Initial version
2.0	7/10/2023	Updated branding
3.0	10/29/2025	Grid Reconciliation view

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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!!
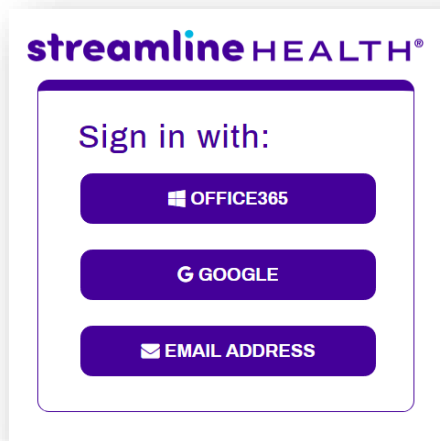
REVID APPLICATION

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.
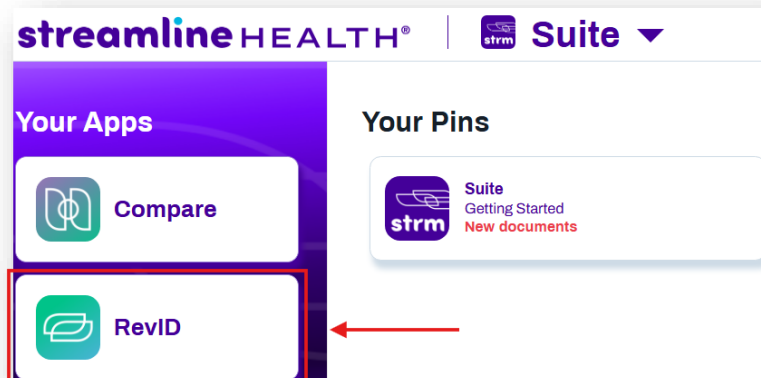
SELECT FACILITY

Select your facility from the drop-down location.
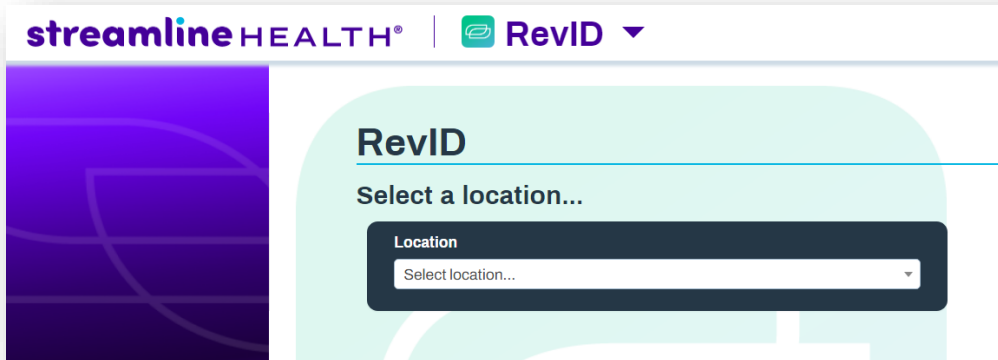
THE FRONT DESK

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.

RECONCILIATION TOOL

Daily charge reconciliation begins with the Reconciliation Tool! Select the **Reconciliation** tool from the left side of the screen.

This will bring you to the Reconciliation grid.

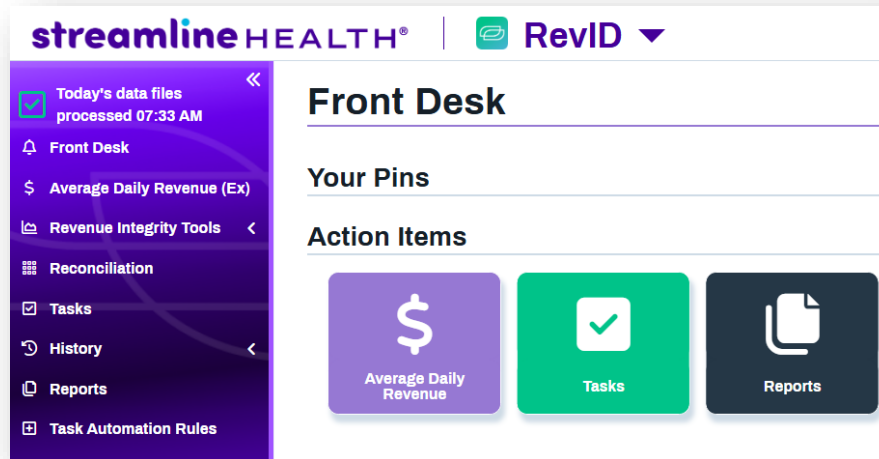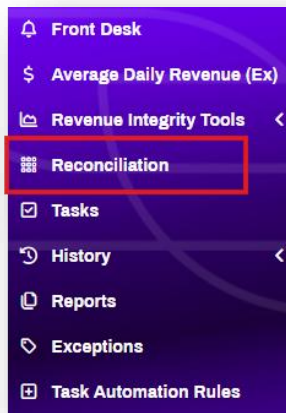## ACCESSING YOUR DEPARTMENT/COST CENTER(S)

Users will see a full list of clinical events in the grid for all of the cost centers they have access to. Users can focus in on clinical events from a specific cost center by selecting it from the **Department/Cost Center** drop down menu in the upper left-hand side of the screen.

CHARGE RECONCILIATION

Signing off daily on your 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 (Missing)** 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 (New)** 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 (Matched)** clinical events: At least one charge item matched the clinical event. Green items should also be reviewed to ensure accuracy.

Viewing Event Details

Clinical Event Icons

Upon opening the clinical event details, you may see an icon appear above the patient's name (see example below).

- **MIPA:** 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.

- **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.
  - o 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.
  - o Example: Third-party charge interface or manual charge capture in the financial system.

- **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.

- **$ - $$$$:** Event Impact Rating. This is represented by a dollar sign scale (1–4-dollar signs) indicating the financial impact of the missing charges based on historical data for similar clinical events.

Task Assignment

Assigning a Task

Remember, all events with a red/Missing status require task assignment before you can sign off on your daily charge reconciliation. There are two ways to add a task to a Clinical Event – from the Grid view (individually or mulitple at a time) or from within the clinical event details.

Assigning a task from the grid view

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Assigning a task from the Clinical details view

Task 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:
  - o **NEW:** Task created but no research has been completed to identify issue.
  - o **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.
  - o **RESOLVED:** Task that have been resolved and require no further follow up.
  - o **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**.

Signing off on your Charge Reconciliation

This function is available to certain users depending on the role you have been assigned in RevID. Once all clinical events with a status of red/Missing are assigned a task, you may sign off on your daily charge reconciliation by clicking the **Sign Off** button at the top right-hand side of the screen.
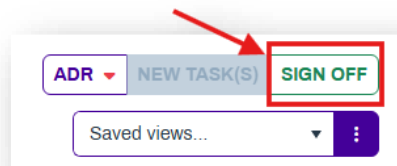

A pop-up message will appear, showing you which of the cost centers are ready to be signed off. You can select/deselect those you wish to sign off on by checking the boxes to the left of the cost center name. Selecting the box at the top of the list will select/deselect all cost centers.
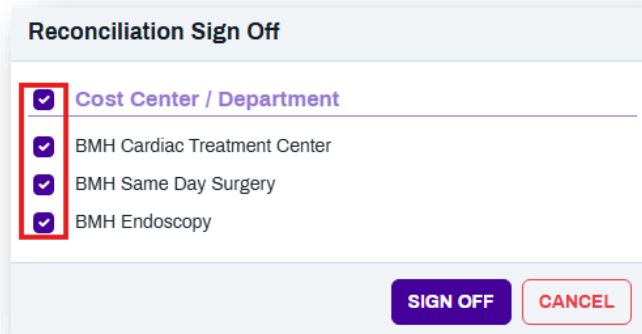
TASK TOOL

Tasks are clinical events with a red/Missing status that the enduser has marked with a NEW or IN PROGRESS status and need to be reviewed. To access them, click the **Tasks** tool from the left side of the front desk screen.
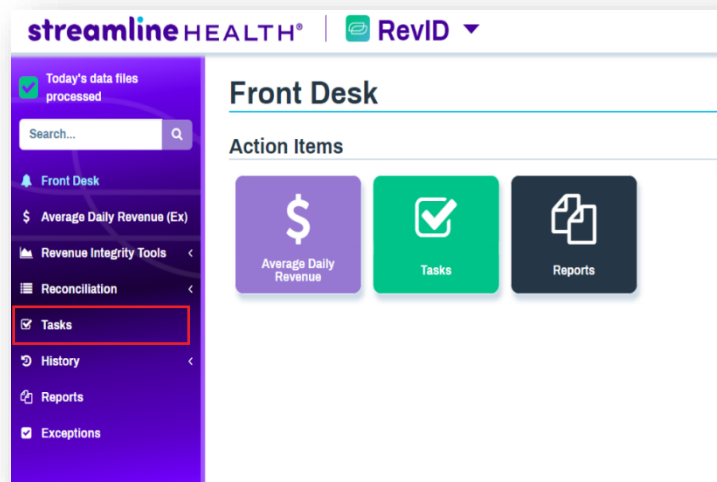
TASK TYPES

By default, each of the task filters will display 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 a Task Status of New or In Progress
2. Tasks Assigned Out (in Yellow)
   a. To see tasks that have been **created** by you
   b. These records will have a Task Status of New or In Progress
3. Open Tasks (in Green)
   a. To see **all** tasks that you can view, based on the cost centers you have access to

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SORT AND FILTER TASKS

You can sort or filter any of the columns on the task list by clicking on the ellipsis to the right of any column header. You can also adjust which columns you see in this view by selecting **Column Visibility**. Columns can be rearranged by dragging them left and right.

UPDATE TASKS

Tasks can be updated individually or many at a time. To update multiple, check the boxes to the left-hand side of the screen and then click the **Update Tasks** button.

This will open a new dialog box.

HISTORY TOOL

The History tool allows users to view clinical events that were signed off in the past. To access, click on **History** from the left side of the Front Desk and select the cost center to be reviewed.
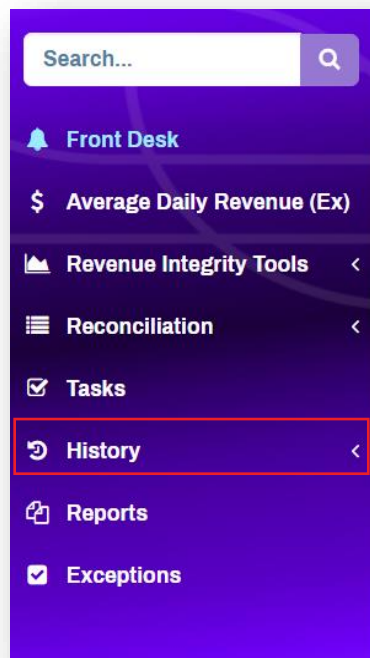
The view will default to the list of clinical events from the last day the cost center signed off. To search for a different date, click on the calendar icon in the top left of the screen and select a day in bold font to see that list of clinical events.

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.
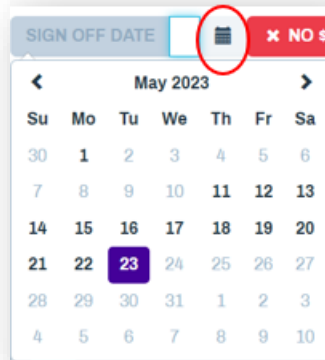
REPORTS TOOL

The Reports tool allows endusers to download reports based on a selected date range. They can be customized and downloaded in an Excel format. Select **Reports** from the left-hand side of the Front Desk.
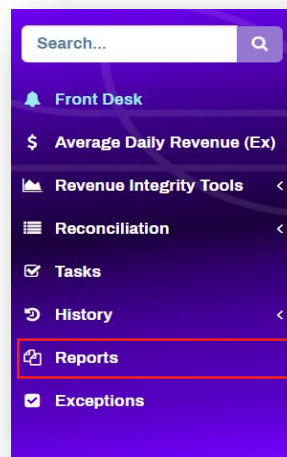
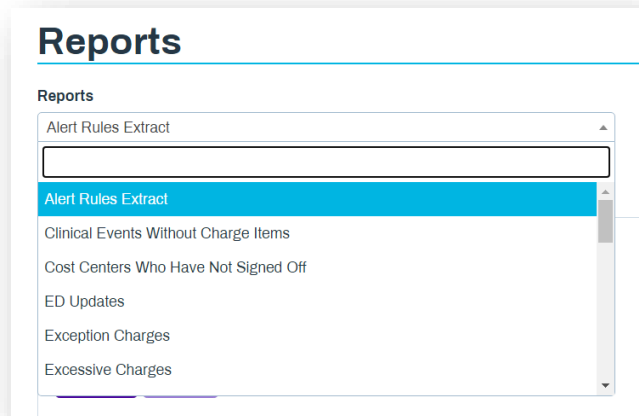Select the desired report from the drop down menu and click "Submit". This will generate an excel report which will be downloaded to your PC.

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. Select a Report to create.
2. Click the yellow Customize button on the right. Click New.
3. Enter a Template Name.
4. Select a Report Format.
5. 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 those reports to the top of the reports drop-down list and is indicated by a yellow star to the right of the report name. To tag a favorite report:

1. Select a report from the drop-down list.
2. Click the **ADD TO FAVORITES** button on the right.
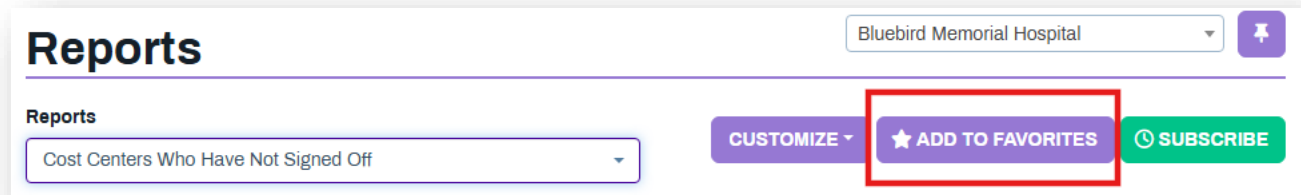
SUBSCRIBE

Users can subscribe to reports. This feature will generate and deliver the report to your email inbox at a frequency and time you select. To subscribe to a report:

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