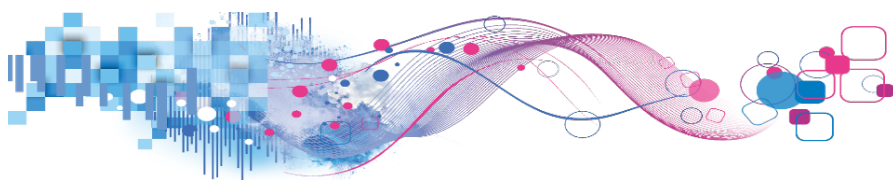


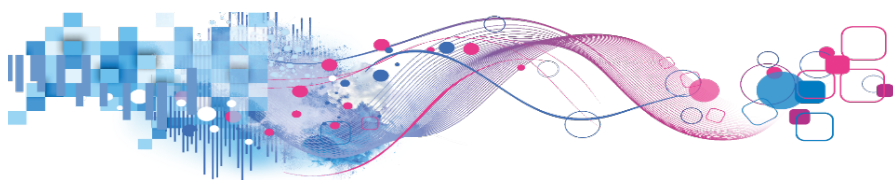
Patient Estimates

User Guide



Contents

Introduction	3
Navigation	4
Search Options	7
Chargemaster Search	7
Chargemaster Search, Specific	8
Template Search	10
Grouped Procedures	11
Easy Search	12
Claims Search	13
Estimate Results	15
Patient	16
Notes	16
Services	17
Discounts	18
Benefits	19
Out-of-Pocket Options	21
Representative Script	22
Reference Number	22
“Shopper” Estimates	23
Professional Estimates	27
Chargemaster/Template/Easy Search	27
Claims Search	29
Combined Estimates	31
Chargemaster/Template/Easy Search	31
Claims Search	33
Estimate Lookup	36
Troubleshooting	38
Missing Benefits	38
Change Coverage	40
Customer Support	41

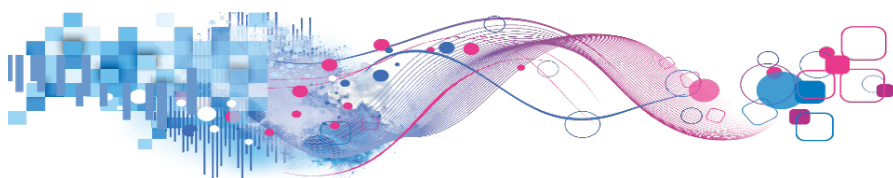


Introduction

Patient Estimates (PE) is a user-friendly product that allows patient cost estimates to be generated by utilizing information from the charge description master (CDM), payer contracts, claims data, and eligibility response data such as copay, deductible, and coinsurance. Multiple search options and customized templates make it easy for users to find the right procedure, while easy-to-read estimate breakdowns allow for transparency so that users and patients can understand how the estimate was calculated.

PE is able to calculate different types of estimates based on a facility's needs. Available estimate types include **hospital** (facility) estimates, **professional** (physician) estimates, and **combined** estimates of both hospital and professional charges. Unless otherwise noted, the instructions on the subsequent pages will use examples from a hospital estimate. Hospital, professional, and combined estimates all follow the same general steps detailed in this guide. However, there are slight differences in professional and combined estimates that will be covered in dedicated sections beginning on page 28. Please note that the types of estimates implemented varies by facility. Not all estimate types are available at all facilities.

The following guide will instruct readers on the use of PE within the **eCare NEXT (eCN)** platform. The settings shown in this manual are provided as examples only and may not be reflective of the configuration at your facility.



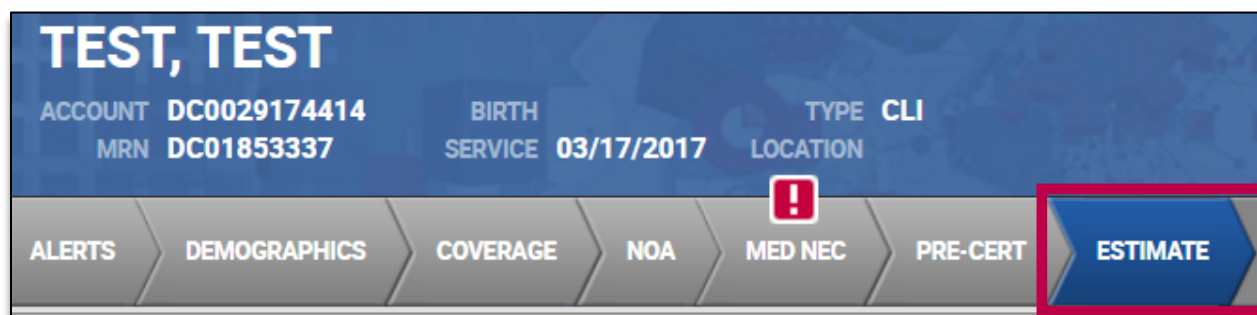
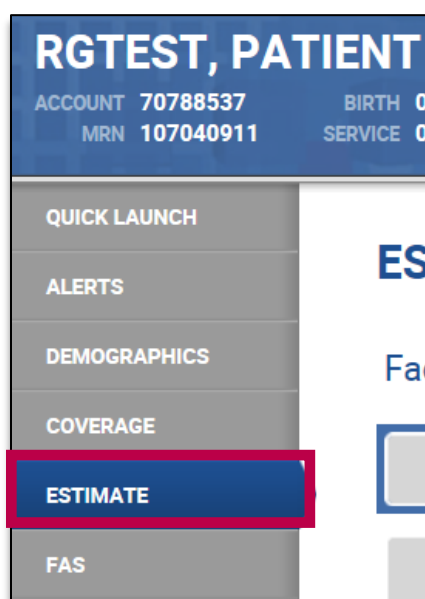
Navigation

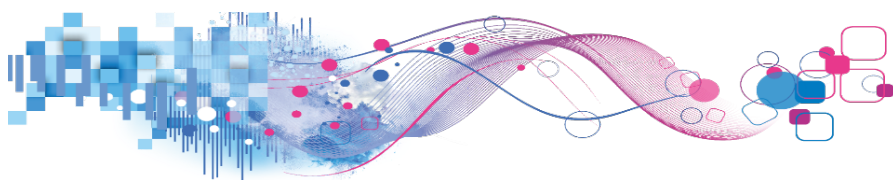
Estimates may be generated as soon as active eligibility for the patient has been received by eCare NEXT. Users may access PE through the NEXT Bar or by clicking on the **Estimate** chevron in eCare NEXT.

To access PE from the NEXT Bar, click the **EST** button. "EST" stands for Estimate.



Depending on an individual facility's settings, the chevrons may appear at the top of the eCare NEXT page or the left side of the page.





The estimate screen will display.

ESTIMATE

Facility:

☐

Step 1: Pick Procedures

LAUNCH

☐

Step 2: Estimate Results


Select Procedures first to run an estimate.

Users at facilities with multiple sites may have a dropdown menu allowing them to select a specific site. For most clients, a default facility may already be selected. This facility is chosen based on the location data sent in messages from your registration system.

If a facility has not been selected or you desire to choose a different facility, make a selection from the dropdown menu.

Facility:

The page will refresh to allow the available procedures to update in accordance with the specified facility's CDM, commonly referred to as the **chargemaster**.

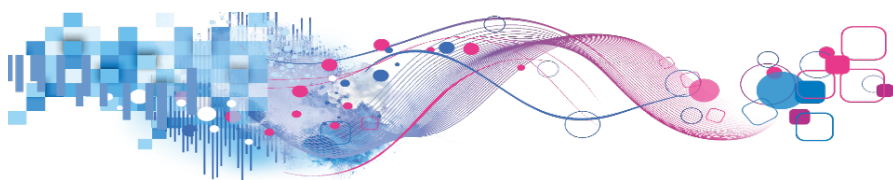
Please wait while procedures are updated... 

Click anywhere on the **pick procedures** banner to begin.

☐

Step 1: Pick Procedures

LAUNCH



A new pop-up window will display. Select the procedures or services that the patient will be receiving during their visit to your facility using one of the search options on the left side of the screen.

Select Procedure(s)

CHARGEMASTER SEARCH

CLAIMS SEARCH

TEMPLATE SEARCH

EASY SEARCH

GENERIC PROCEDURES

CARDIOLOGY

CT SCAN

CT SCAN WITH & W/O CONTRAST

CT SCAN WITH CONTRAST

EMERGENCY SERVICES

INPATIENT PROCEDURES A-D

INPATIENT PROCEDURES E-J

INPATIENT PROCEDURES K-O

INPATIENT PROCEDURES P-S

INPATIENT PROCEDURES T-Z

LAB (A - D)

LAB (E - J)

LAB (K - P)

LAB (Q - Z)

MRA

MRA WITH & W/O CONTRAST

MRA WITH CONTRAST

MRI

MRI WITH & W/O CONTRAST

MRI WITH CONTRAST

NEUROLOGY

NUCLEAR MEDICINE

NURSERY

OUTPATIENT PROCEDURES A-E

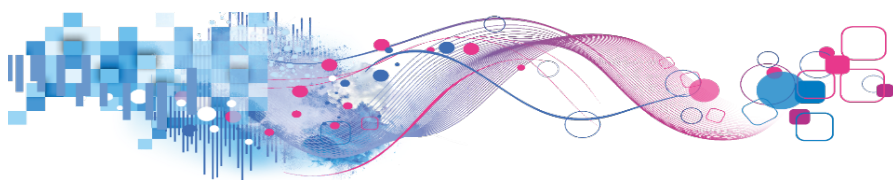
OUTPATIENT PROCEDURES F-L

OUTPATIENT PROCEDURES M-P

Start Page

Please select a search or a category on the left to start

Selected Procedures



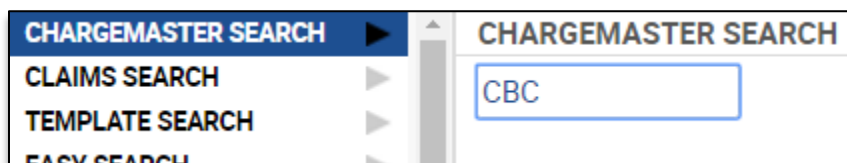
Search Options

PE offers several search options to help you easily locate the procedures that you need for the estimate. Search options include the **Chargemaster Search**, **Template Search**, **Easy Search**, and **Claims Search**.


Please note that not all search options are enabled at all facilities.

Chargemaster Search

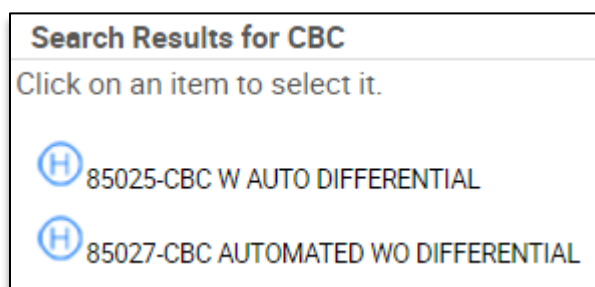
The **Chargemaster Search** searches the facility's chargemaster by keyword, CPT code, or charge code for procedures that have a **fixed price** in the CDM. Please note that CDMs may contain codes or charges with similar or identical names. Without knowing the charge code, entries such as these may appear to a user to be duplicates. This search option is often recommended for users that know the exact charge code, or for procedures that aren't in the template. To use the Chargemaster Search, type your search criteria into the search field and press enter.





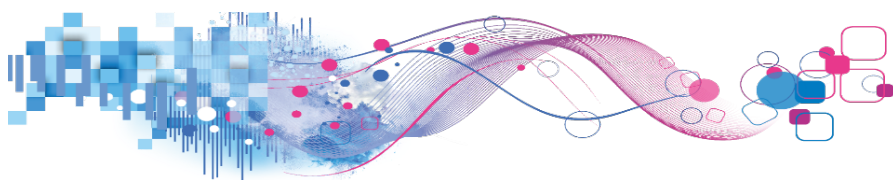
CHARGEMASTER SEARCH	CHARGEMASTER SEARCH
CLAIMS SEARCH	<input type="text" value="CBC"/>
TEMPLATE SEARCH	
EASY SEARCH	

All matching results will be displayed. The  next to the results in the example below indicates that these procedures are considered hospital (facility) procedures.

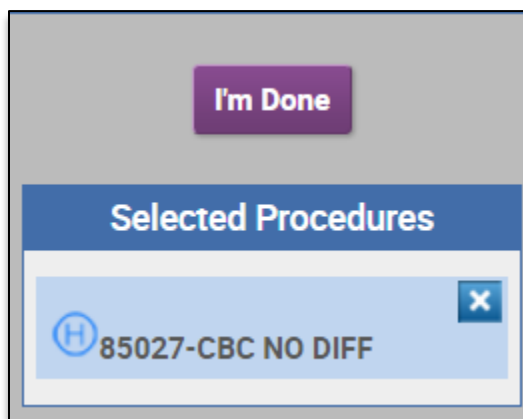
Click on the desired procedure.



Search Results for CBC	
Click on an item to select it.	
	85025-CBC W AUTO DIFFERENTIAL
	85027-CBC AUTOMATED WO DIFFERENTIAL



The procedure will now be listed on the right side of the screen under the **selected procedures** section. This section can be thought of as the patient's "shopping cart". To remove an item from the cart, click the **x** next to the procedure name. To "check out" and run the estimate, click **I'm done**.

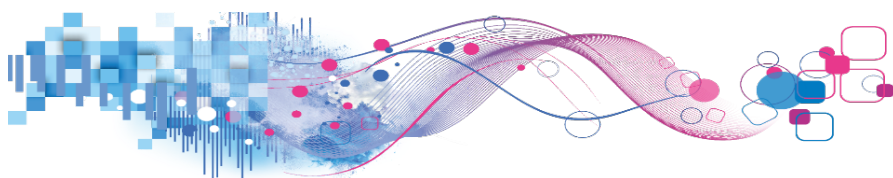


Chargemaster Search, Specific

Chargemaster Search, Specific contains all of the functionality of the regular Chargemaster Search, but allows for searches to be more precise by providing separate fields to search by CPT code, description, charge code, and rev code.

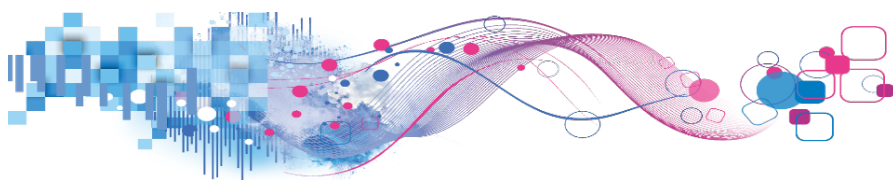
For example, when searching the regular Chargemaster Search for CPT 71020, a user may notice that in addition to results with the CPT 71020, there may also be some seemingly unrelated results. This can be due to "71020" being a part of the charge code. Chargemaster Search, Specific would ignore the charge code results and only show CPT code results if the search criteria was entered into the "CPT code" field.

CHARGEMASTER SEARCH, SPECIFIC	ChargeMaster Search, Specific
HISTORICAL SEARCH, ENHANCED	CPT Code: <input type="text"/>
GENERIC PROCEDURES	Description: <input type="text"/>
BREAST CENTER	Charge Code: <input type="text"/>
CARDIAC CATH	Revenue Code: <input type="text"/>



Search criteria may also be combined. For example, CPT code of 71020 with a revenue code of 320.

ChargeMaster Search, Specific		Click on an item to select it.
CPT Code:	<input type="text" value="71020"/>	71020-LM CHEST, 2V
Description:	<input type="text"/>	71020-XR CHEST, 2 VIEW
Charge Code:	<input type="text"/>	
Revenue Code:	<input type="text" value="320"/>	



Template Search

The **template** is a list of predefined categories of frequently-used procedures custom-built for each facility to make it easier for users to find and pick the correct procedure. The template is intended for procedures that have a **fixed price** in the CDM.

To browse the template, click on any of the categories listed below the search options, such as CT, MRI, or Ultrasound. Template categories will vary by facility.

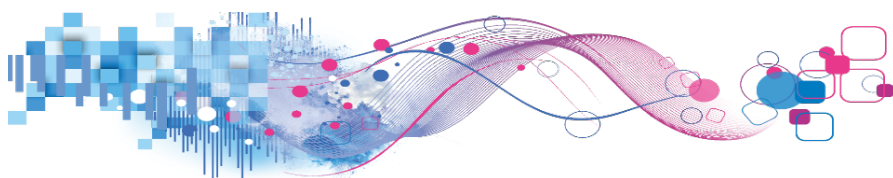
Click on a category name to display the procedures for the selected category. Click on the desired procedure name to add the charge to your list of selected procedures.

CHARGEMASTER SEARCH	▶	CT W & W/O CONTRAST
CLAIMS SEARCH	▶	
TEMPLATE SEARCH	▶	
EASY SEARCH	▶	
GENERIC PROCEDURES	▶	
AUDIOGRAM	▶	
AUDIOLOGY	▶	
CARDIOLOGY	▶	
CT W & W/O CONTRAST	▶	
CT W/ CONTRAST	▶	
DEXA SCAN	▶	

		CT CERVICAL SPINE W/O & W CONTRAST
		CT CHEST W/O & W CONTRAST
		CT HEAD OR BRAIN W/O & W CONTRAST
		CT IAC W/O & W CONTRAST
		CT LUMBAR SPINE W/O & W CONTRAST

The template may be quickly searched and sorted via the **template search**. Enter your search criteria in the search field and press **enter**.

CHARGEMASTER SEARCH	▶	TEMPLATE SEARCH
CLAIMS SEARCH	▶	
TEMPLATE SEARCH	▶	<input type="text" value="71020"/>
EASY SEARCH	▶	
GENERIC PROCEDURES	▶	



Results will be displayed. Click on an item to make a selection.

CHARGE MASTER SEARCH	▶	Search Results for 71020 Click on an item to select it. Ⓜ 71020-CHEST PA LAT (PRE SURG) 2V Ⓜ 71020-CHEST PA LATERAL 2V
CLAIMS SEARCH	▶	
TEMPLATE SEARCH	▶	
EASY SEARCH	▶	
GENERIC PROCEDURES	▶	
AUDIOGRAM	▶	
AUDIOLOGY	▶	

The procedure will now be listed on the right side of the screen under the **selected procedures** section. This section can be thought of as the patient's "shopping cart". To remove an item from the cart, click the **x** next to the procedure name. To "check out" and run the estimate, click **I'm done**.


I'm Done

Selected Procedures


Ⓜ 71020-CHEST PA LATERAL 2V **x**


Grouped Procedures


Procedures that will always be performed together may be **grouped** on the template. This functionality saves time and ensures procedures aren't missed by allowing users to select multiple procedures with a single click.

A group is identified by a  icon next to the procedure name. Hover the mouse over the desired procedure to view the items that are a part of the group. Click on an item to make a selection.

CT W & W/O CONTRAST







Ⓜ  CT CERVICAL SPINE W/O & W CONTRAST

 CT CERVICAL SPINE W/O & W CONTRAST
* 72127-CT CERVICAL SPINE WO/W CONTRAST
* CT CONTRAST

 CT HEAD OR BRAIN W/O & W CONTRAST

Easy Search

Easy Search combines the functionality of the Chargemaster Search and the Template Search to allow users to search both at the same time. Users may also use Easy Search to search just the Chargemaster or just the template by making a selection from the search type dropdown. To use this search option, type a code or keyword into the search field. Results will automatically begin to populate below.

EASY SEARCH							
Search: <input type="text" value="71020"/>		Search Type: <input type="text" value="BOTH"/>					
Category	CDM Group	Proc Code	Description	Rev Code	CDM Code		
		71020	XR CHEST INSPIRATN/EXPIRATN 2V	324	84600519		
		71020	XR CHEST PA/LAT (PRE-SURG) 2V	324	84600642		
		71020	XR CHEST PA AND LATERAL 2V	324	84600733		
		71250	CT CHEST WO CONTRAST	352	84710201		
	RADIOLOGY	71020	CHEST PA LAT (PRE SURG) 2V	324	84600642		
	RADIOLOGY	71020	CHEST PA LATERAL 2V	324	84600733		

Legend:



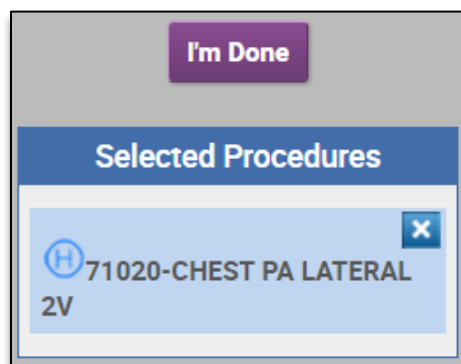
Chargemaster Result

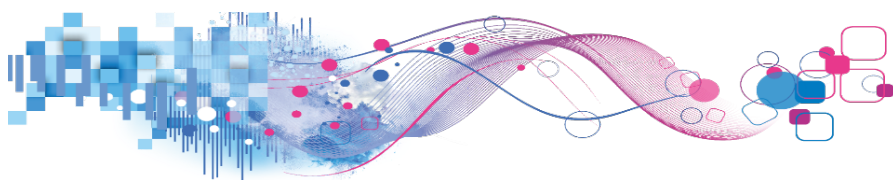


Template Result

In addition to the procedure code and description, Easy Search results will also display the procedure's template category, CDM group, revenue code, and CDM code.

Click a result to make a selection. The procedure will now be listed on the right side of the screen under the **selected procedures** section. To run the estimate, click **I'm done**.





Claims Search

Claims Search uses data collected from the facility's 837 claim files to provide a historical claim price when a procedure is searched. This search option allow for estimates to be given on procedures that do **not** have a fixed price in the facility's CDM, such as outpatient surgeries and inpatient stays.

To begin, select a patient type from the dropdown menu, then search by CPT or ICD. Additionally, users may search by DRG for inpatients. In the example below, a search for CPT 45380 is shown with a result of 811 hits. The number of **hits** is the number of claims that match the specified CPT code.

The screenshot shows a web interface for 'Claims Search'. At the top, there is a 'Patient Type' dropdown menu set to 'Outpatient'. Below this is a 'Search' section with a 'CPT/HCPC' label and a text input field containing '45380'. A dropdown menu is open below the input field, displaying the text '(45380) (811 hits) COLONOSCOPY, FLEXIBLE; WITH BIOPSY, SINGLE OR MULTIPLE'. A mouse cursor is pointing at this dropdown result.

If desired, enter any additional inclusions or restrictions, such as diagnosis, provider, or location. Click **search**.

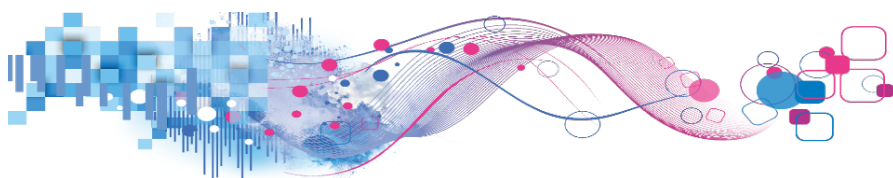
The screenshot shows the full 'CLAIMS SEARCH' interface. At the top, the title 'CLAIMS SEARCH' is followed by a 'Patient Type' dropdown menu set to 'Outpatient'. Below this is a 'Search' section with three input fields: 'CPT/HCPC', an empty field, and another empty field. Below these is an 'ICD Procedure' input field and a checkbox labeled 'Primary Only'. Below the search section is an 'Additional Restrictions' section with two checkboxes: 'Include ER Results' and 'Include Modifiers/POS Details'. Below these is a note: 'Note: Diagnosis codes with * denote ICD-10'. Below the note are three input fields: 'Diagnosis', an empty field, and a checkbox labeled 'Primary Only'. Below these are two dropdown menus: 'Attending Provider' set to 'All' and 'Location' set to 'All'. At the bottom right of the form are two buttons: 'Search' and 'Reset'.

The results page will break down the claims by revenue code and diagnosis. If a user does not know the diagnosis code, Experian Health best practice is to pick the top result. Click on the desired result to proceed.

Claim Search Results					
Showing 49 entries					
#	Description	CPT/HCPC	Rev Code	Diagnosis	Total
264	(45380) COLONOSCOPY, FLEXIBLE; WITH BIOPSY, SINGLE OR MULTIPLE	45380	360	V7651	6265.82
84	(45380) COLONOSCOPY, FLEXIBLE; WITH BIOPSY, SINGLE OR MULTIPLE	45380	360	V1272	6310.06

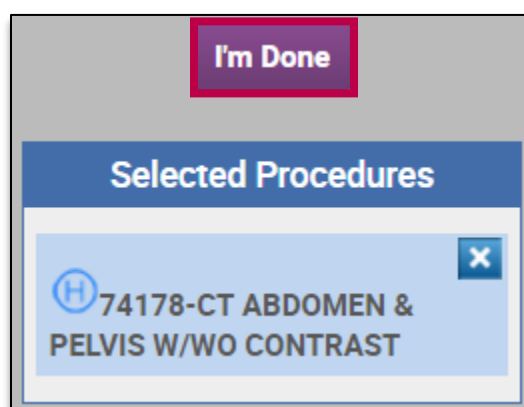
The next screen will show a breakdown of all associated charge line items that are present on at least 70% of the claims searched. Users may uncheck any line items that they do not wish to have included in the estimate. If the user is unsure of which line items should be included, it is recommended that they leave all lines checked. Click **select** to add the procedure to the estimate.

Showing 6 entries						
Diagnosis: V7651						
Total Charges: \$6265.82						
All of these Charge Line items came back associated with your search. Review and uncheck the Charge Line item if it is not applicable to the patient.						
				Select Back		
Description	CPT/HCPC	Modifiers	Rev Code	Units	Charge	Use <input checked="" type="checkbox"/> All
MED SUR-SUPPLIES			270	1	122.82	<input checked="" type="checkbox"/>
LEVEL IV - SURGICAL PATHOLOGY, GROSS AND MICROSCOPIC EXAMINATION ABORTION - SPONTANEOUS/MISSED ARTERY, BIOPSY BONE MARROW, BIOPSY BONE EXOSTOSIS BRAIN/MENINGES, OTHER THAN FOR TUMOR RESECTION BREAST, BIOPSY, NOT REQUIRING MICROSCOPIC EVALUATION OF SURGICA	88305		310	2	996.84	<input checked="" type="checkbox"/>
COLONOSCOPY, FLEXIBLE; WITH BIOPSY, SINGLE OR MULTIPLE	45380		360	1	4241.11	<input checked="" type="checkbox"/>
INJECTION, MIDAZOLAM HYDROCHLORIDE, PER 1 MG	J2250		636	1	23.75	<input checked="" type="checkbox"/>
INJECTION, FENTANYL CITRATE, 0.1 MG	J3010		636	1	21.87	<input checked="" type="checkbox"/>
RECOVERY ROOM			710	1	859.43	<input checked="" type="checkbox"/>



Estimate Results

Once all services have been selected, click **I'm done** to run the estimate.



After a brief calculation, the estimate results will display. The estimated patient responsibility will be listed at the top of the estimate, with a detailed explanation below. In the example below, the estimate result is \$293.

Selected users may see a red delete estimate button located near the top of the screen. This function can be useful when running test estimates during user-acceptance testing and training. This function is permissions-based and is only visible for select users.

Step 1: Pick Procedures **Resubmit** **LAUNCH**

Step 2: Estimate Results **\$293.00** **DELETE ESTIMATE**

Patient

Patient Name: Test Training
Insurance: UNITED HLTHCR PPO/POS/OA 87726 - UNIHPP00
Account Number: [REDACTED]
Policy Number: [REDACTED]
Status: Verified
Subscriber Number: [REDACTED]
Processed On: [REDACTED]

Characters remaining: 2000
account notes ...

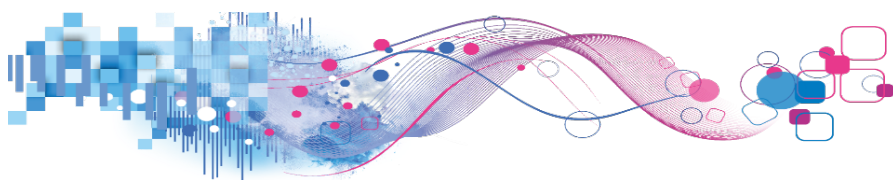
Characters remaining: 2000
printed notes ...

Update Notes

Services

Charge Code	Service Definition	Charge Description	Svc Charge	Adj Charge	Quantity	Total
93307 483	Hospital Outpatient	(H) ECHO W/2D & M MODE	\$1,221.00	\$825.40	1	\$825.40
Total Charges						\$825.40

The estimate results are broken into four sections: **patient**, **services**, **benefits**, and **representative script**.



Patient

The **Patient** section displays account overview information, including the patient's name and policy number. This section also displays the name of the insurance plan that is being used to value the estimate.

Patient

Patient Name	Test Training
Insurance	UNITED HLTHCR PPO/POS/OA 87726 - UNIHPP00
Account Number	██████████
Policy Number	██████████
Status	Verified
Subscriber Number	██████████
Processed On	

Characters remaining: 2000
account notes ...

Characters remaining: 2000
printed notes ...

Update Notes

Notes

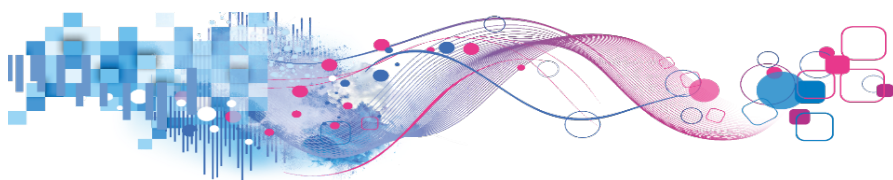
This section also contains two text boxes. The box labeled **“account notes”** (left) is intended for internal notes. These notes will be visible to any user who accesses the patient estimate via eCN. The box labeled **“printed notes”** (right) is intended for patient-facing comments. Notes typed in this field will be displayed on the printed PDF estimate that can be provided to patients.

After entering notes in either box, click **update notes** to save the changes.

Characters remaining: 2000
account notes ...



Characters remaining: 2000
printed notes ...

Update Notes



Services

The **Services** section lists the procedures and services on the estimate. Each service will be listed on a separate line.

Services						
Charge Code	Service Definition	Charge Description	Svc Charge	Adj Charge	Quantity	Total
93307 483	Hospital Outpatient	 ECHO W/2D & M MODE	\$1,221.00	\$825.40	<input type="text" value="1"/>	\$825.40
Total Charges						\$825.40 

Charge Code – The first value listed in this column is the procedure's CPT, ICD-10 or DRG code. The number in purple in the example above is the revenue code.

Service Definition – The specific benefit category that the procedure falls under. The service definition drives the logic that pulls the applicable benefits from the coverage response for the estimate calculation.


Charge Description – The name of the procedure or service.

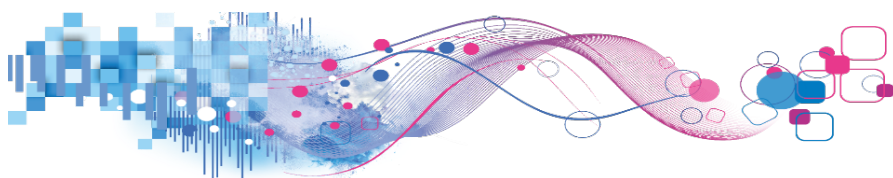
Service Charge – The unadjusted price of the procedure as reflected in the facility's CDM.

Adjusted Charge – The insurance-adjusted charge once the applicable payer contract has been applied, commonly referred to as the payer's **allowable amount**.

Quantity – The quantity will default to 1. Users may manually change the quantity value when needed. If adjusting the quantity, click the **recalculate** button located near the bottom of the estimate.

For an explanation of how the charges were calculated, click on the yellow information icon. The details of the calculation will be displayed below.

Total Charges	\$825.40 
The Outpat term has fired for RevCharg type. Adding 67.60% of \$1,221.00 = \$825.40 * 1 unit = \$825.40 * 1 visit = \$825.40 for CPT code 93307.	
The MISC99 term has fired.	
The total reimbursement is \$825.40.	



Discounts

PE has the ability to automatically calculate applicable **self-pay** and **prompt-pay** discounts. When applicable, these discounts will appear as part of the estimate results just below the service breakdown.

Discounts are custom-programed in accordance with each facility's financial assistance policies. The patient responsibility and discount percentage fields may be manually adjusted when appropriate. If making adjustments to these fields, click the **recalculate** button to allow the system to make any changes to the estimate total.

Discounts

Patient Responsibility	Discount	Savings	Amount Due
<input type="text" value="\$2970.00"/>	Self-Pay <input type="text" value="40%"/>	\$1,188.00	\$1,782.00

Benefits

The patient's individual benefits are applied in the **Benefits** section. The values listed in these fields are taken from the eligibility response located under the **Coverage** chevron, and include copay, coinsurance, deductible, and out-of-pocket (OOP) amounts.

Please note that the overall deductible and out-of-pocket amounts are listed for information only. Only the deductible remaining and out-of-pocket remaining are used in the calculation of the estimate.

If making manual changes to the information in this section, click on **recalculate** to allow the estimate total to reflect the changes. Previously run estimates can be viewed by clicking on **previous**.

To view a copy of the estimate in PDF format, select a language from the dropdown menu and click **print estimate**. You may print this document and provide it to your patient for their reference. Estimate print-outs are available in English and Spanish. Additional languages may be available if a translation is provided to Experian Health by your facility.

Benefits

Out of Pocket Options

Deductible Applies to OOP ☐ Yes ☒ No

Co-Pay Applies to OOP ☒ Yes ☐ No

Service Categories: Hospital Outpatient

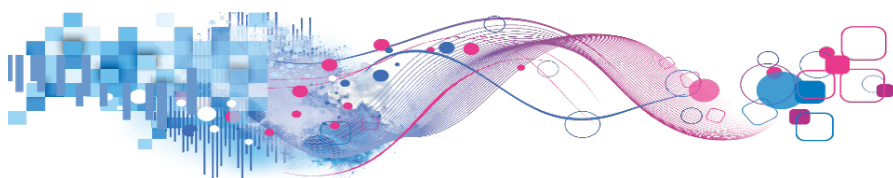
Payer

Primary


Total Adj Charges	\$825.40
Co-Pay	\$200.00
Co-Insurance	15.00%
Individual Deductible	\$0.00
Individual Deductible Remaining	\$0.00
Family Deductible	\$0.00
Family Deductible Remaining	\$0.00
Individual Out of Pocket	\$5350.00
Individual Out of Pocket Remaining	\$4509.60
Family Out of Pocket	\$10700.00
Family Out of Pocket Remaining	\$8094.39
Estimated Patient Responsibility	\$293.81

Recalculate Previous

English Print Estimate

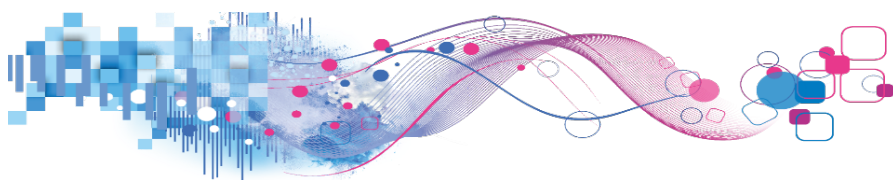


For a detailed breakdown of the estimate calculation, click on the yellow "i" next to the estimated patient responsibility.

Service Categories	Hospital Outpatient
Payer	Primary
Total Adj Charges	\$825.40
Co-Pay	\$200.00
Co-Insurance	15.00%
Individual Deductible	\$0.00
Individual Deductible Remaining	\$0.00
Family Deductible	\$0.00
Family Deductible Remaining	\$0.00
Individual Out of Pocket	\$5350.00
Individual Out of Pocket Remaining	\$4509.60
Family Out of Pocket	\$10700.00
Family Out of Pocket Remaining	\$8094.39
Estimated Patient Responsibility	\$293.81 

The information shown in the estimate explanation can help you and your patient to understand how the estimated amount is determined.

Estimate Explanation			
START	\$825.40	Insurance Adjusted Charges	
-	\$0.00	subtract Individual Deductible Remaining	
-	\$200.00	subtract Co-Pay	
=	\$625.40	equals Subtotal	
x	15.00%	multiply Co-Insurance Percentage	
=	\$93.81	equals Co-Insurance Amount	
This estimate is set to Exclude Deductible and Include Co-Pay from OOP Calculation			
+	\$200.00	add Co-Pay	
=	\$293.81	equals Subtotal	
Compare to OOP, Use \$293.81 since it's the lesser of \$293.81 and \$4,509.60			
+	\$0.00	add back Individual Deductible Remaining	
=	\$293.81	equals Subtotal	
FINISH	\$293.81	Estimated Patient Responsibility	



Out-of-Pocket Options

At the top of the Benefits section, some users may have the option to choose whether or not the deductible and copay apply toward the out-of-pocket (OOP) amount. By default, the deductible does not apply toward OOP, but the copay does apply. If a payer response indicates otherwise, users with this option may alter the estimate settings by clicking on the applicable radio button and clicking **recalculate**. Please note that this option is permission-based and may not be present for all users.

Out of Pocket Options

Deductible Applies to OOP ☐ Yes ☒ No

Co-Pay Applies to OOP ☒ Yes ☐ No

Representative Script

The final section of the estimate contains the **representative script**, which includes suggested language that users are encouraged to use when speaking with patients about their estimate. This script will vary by facility, but generally includes a reminder that the patient is being provided with an estimate, not a guarantee of final billed charges. The **script language** may be changed to the patient's preferred language using the dropdown menu. The representative script is customizable and may vary by facility.

Click the **yes, I read this script to the patient** button to confirm that you have read this information to the patient.

Representative Script

Script Language English

The estimate provided is not a guarantee of final billed charges. Final billed charges may vary due to unknown circumstances or complications and the patient's medical condition. Additional fees may apply, that are not included in this estimate from physician, radiologist, anesthesiologist and pathologist. Benefits and eligibility are provided from your insurance company within the last 30 days or the date of this estimate and is subject to change.

We accept all major credit cards, debit cards and personal checks. How would you like to handle this payment today?

MEDICARE OUTPATIENT:

Since Medicare does not cover at 100% we are asking for an estimate of "x" today. We accept all major credit cards, debit cards, and personal checks. How would you like to handle this payment today?"

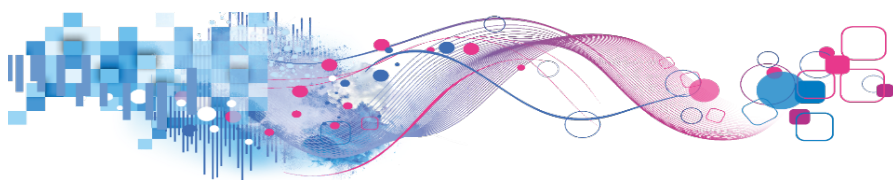
*Reminder: If patient becomes admitted, remember the 60-day rule and refer to scripting in register resources.

Yes, I read this script to the patient

Reference Number

The bottom of each estimate contains a unique reference number as well as the name of the user who ran the estimate. When contacting Customer Support about an estimate, please include the reference number.

Reference #: 34M1YDZO
Estimate run by Heather Kalapodis



“Shopper” Estimates

With the rising cost of healthcare, patients have become increasingly savvy at shopping around for their healthcare. As consumers, they want to know how much they’re going to owe for their care, so many facilities have seen an increase in inquiries from “**window shoppers**” – patients calling around to multiple facilities to see where they can get the best value before scheduling a procedure.

Since these patients will not yet have a scheduled visit for their procedure in your registration system, their information won’t be automatically available in eCare NEXT. However, you can still run an estimate by manually adding a patient to eCare NEXT via the **Quick Launch** function.

Quick Launch can be accessed by clicking on **create a new patient** in the work queue.

STATUS	DOS	MRN	ACCOUNT	OVERVIEW
No status...	01/11/2017	0000001	0000001	Registered by: Chase Pilkington Created by: Chase Pilkington Updated by: Chase Pilkington Facility: Patient Email Test:

Manually key in the patient’s information. Name and birthdate are required fields for patient registration. By default, you will see tabs for **demographics**, **coverage**, and **encounter**. To turn off tab mode and display all fields on one page, turn off the tabs mode.

Demographics | Coverage | Encounter | **TABS ON**

Account Number: [] MRN: []

Patient Information

Date of Birth * [] Sex: ☐ Male ☐ Female

Home Phone: []

Patient Last Name * [] Address 1: []

Patient First Name * [] Address 2: []

Patient Middle Name: [] City: []

Patient SSN: [] State: [] ZIP Code: []

Guarantor Information ☒ same as patient

Date of Birth [] Sex: ☐ Male ☐ Female

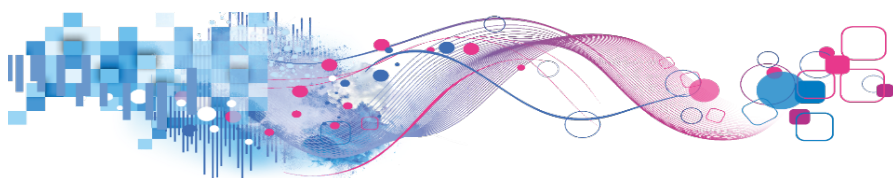
Home Phone: []

Guarantor Last Name: [] Address 1: []

Existing Account Search

Minimum Data For

- Patient Registration ☐ Highlight minimum data
- Address Verification ☐ Highlight minimum data
- Eligibility Verification ☐ Highlight minimum data
- PayNav ☐ Highlight minimum data
- Estimates ☐ Highlight minimum data
- Pre-Certification ☐ Highlight minimum data
- Medical Necessity ☐ Highlight minimum data



Navigate to the coverage tab and enter the patient's insurance information, if applicable. eCN will use this information to run a verification of the patient's eligibility so that their benefits may be factored into the estimate. Required fields for running an estimate on an insured patient are shown in gold below.

Demographics **Coverage** Encounter TABS ON

Insurance 1 required fields

Insurance Type **Commercial** Payer

Plan Code

Service Type

Subscriber Information ☒ same as patient

Subscriber Relation to Patient **Self**

Subscriber Date of Birth

Subscriber Last Name

Subscriber First Name

Subscriber Middle Name

Subscriber SSN

Group Number

Subscriber ID

Subscriber Address 1

Subscriber Address 2

Subscriber City

State

ZIP Code

Add Insurance

If the patient is uninsured, select **self-pay** from the **insurance type** dropdown. Leave the other insurance dropdown menus and fields blank.

Insurance Type **Commercial** Payer

Medicaid

Medicare

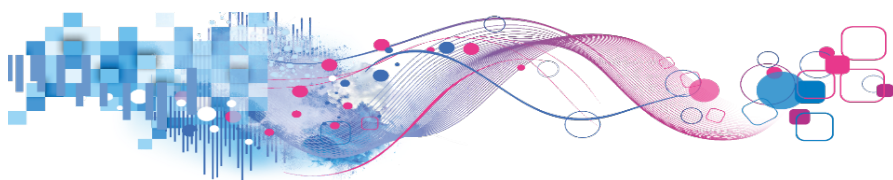
Military

CHIP

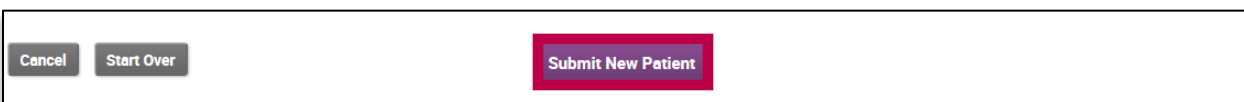
TPA

Self-Pay

types

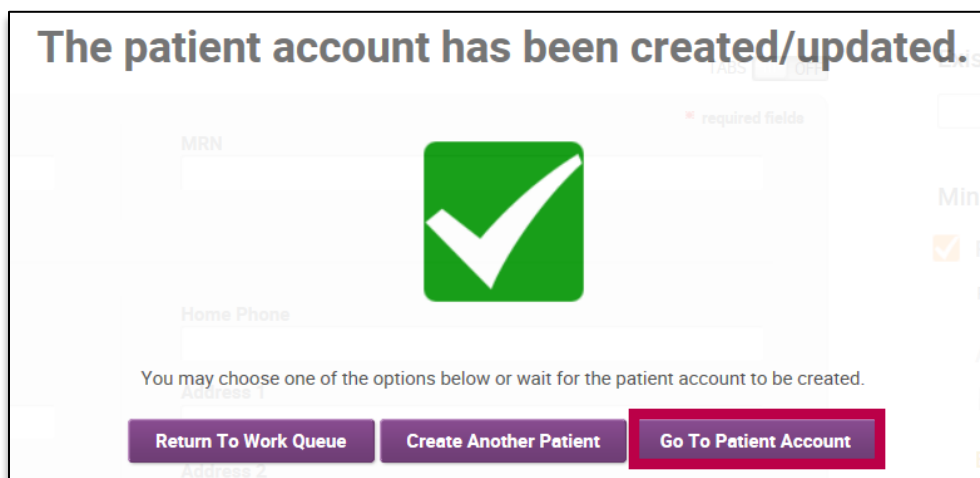


After filling out all required information, scroll to the bottom of the screen and click on **submit new patient**. Alternatively, you may select the **cancel** button to back out of the account creation process, or the **start over** button to clear the form.



Cancel Start Over Submit New Patient

The following message will appear after the successful creation of a new patient:



The patient account has been created/updated.

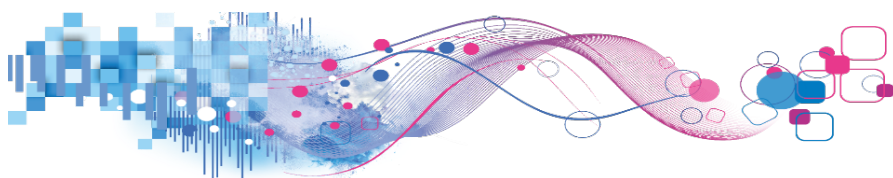
MRN

Home Phone

You may choose one of the options below or wait for the patient account to be created.

Return To Work Queue Create Another Patient Go To Patient Account

The user may choose to **return to the work queue**, **create another patient**, or **go to the patient account** using the buttons provided. If no selection is made, the user will automatically be redirected to the patient account page in eCN.



If needed, patient information may be modified under the Quick Launch chevron by clicking **edit patient account**.

Click the **estimate** chevron to run an estimate and follow the steps for estimate creation detailed in the previous sections of this guide. Please note that before running the estimate, it is suggested that users check the status of the eligibility request to ensure that it has returned an eligible response from which benefits can be utilized.



TEST, PATIENT

ACCOUNT PHC_10a577c2-4377-4c1e-a5b5-667fb96d51a6 BIRTH 03/08/2017 TYPE
MRN PHC_7608f384-16c2-41d2-a3a6-11c3acd03234 SERVICE 03/16/2017 LOCATION

status enter com
EDFU

QUICK LAUNCH

ALERTS

DEMOGRAPHICS

COVERAGE !

NOA

AUTH

MED NEC

PRE-CERT

ESTIMATE

TRIAGE

ACCOUNT SUMMARY

Demographics Coverage Encounter

[Edit Patient Account](#)

Patient Information

Name: Test, Patient

Address:

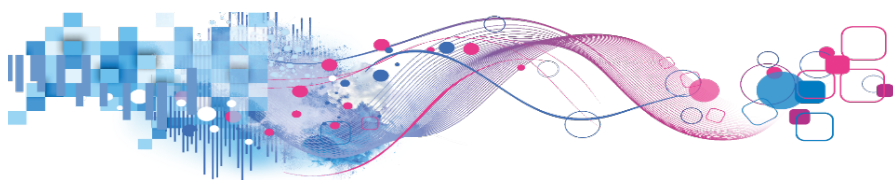
Home Phone:

Date of Birth: 03/08/2017

Sex:

SSN:


Guarantor Information



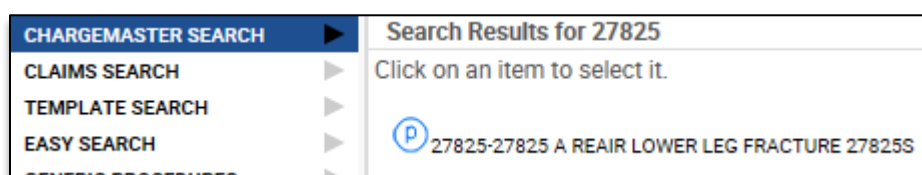
Professional Estimates

Facilities utilizing PE's **professional estimates** functionality will have access to the same search options detailed earlier in this guide. However, when utilizing these search options for professional estimates, users will be prompted for additional information.

Chargemaster/Template/Easy Search

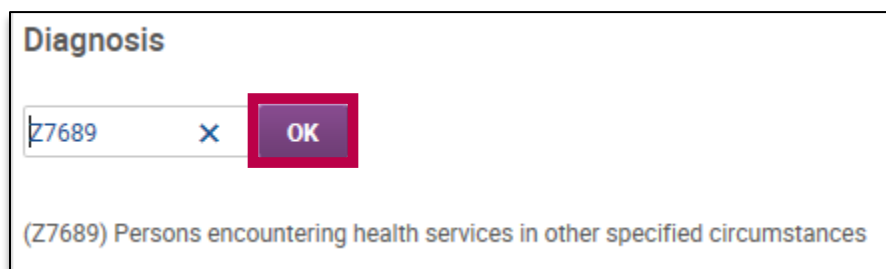
Let's take a look at the example below, which uses the Chargemaster Search. The  next to the service name indicates a professional charge.

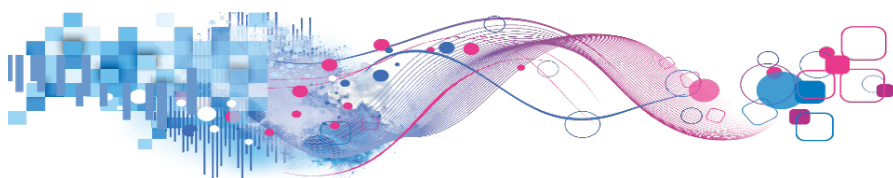
Click on an item to select it.



When using the **Chargemaster Search**, **Template Search**, or **Easy Search** for professional estimates, users will be prompted with the following screens when selecting an item.

Enter the diagnosis (if known), or leave the default diagnosis (Z7689) in the diagnosis field and click **ok**. Please note that the diagnosis screen may not display in all cases.





If known, enter the **professional details**, such as location, physician, participating/non-participating, modifier(s), type of service, and place of service. If unknown, leave the fields blank. Click **add** to add the service to the patient's **selected procedures** column.

Professional Details

Location

Select One

Physician

Par

Non Par

Modifiers

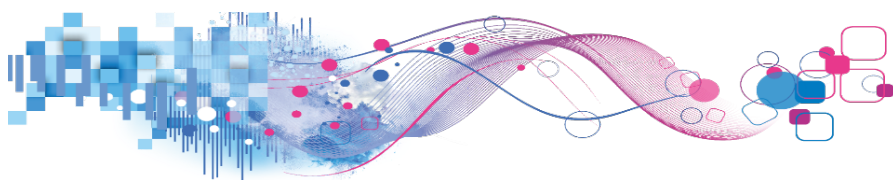
Type Of Service

N/A

Place of Service

N/A

Add



Claims Search

When using **Claims Search** for professional estimates, select a patient type of **professional** from the dropdown menu. Next, enter a CPT/HCPC code or description into the search field to begin your search. The number of **hits** is the number of claims that match the specified CPT code.

CLAIMS SEARCH

Patient Type **Professional** ▼

Search

CPT/HCPC ×

(42830) (23 hits) ADENOIDECTOMY, PRIMARY; YOUNGER THAN AGE 12

(42831) (10 hits) ADENOIDECTOMY, PRIMARY; AGE 12 OR OVER

Select a **location** (required) and choose any additional restrictions, such as **diagnosis** or **provider**. Place a checkmark in the **include modifiers/POS details** box to separate results by modifiers. Click **search**.

CLAIMS SEARCH

Patient Type **Professional** ▼

Search

CPT/HCPC

Additional Restrictions

☐ Include ER Results

☒ **Include Modifiers/POS Details**

Diagnosis

Rendering Provider **All** ▼

Location * **Select One** ▼

Search **Reset**

The results page will break down the claims by diagnosis and, if selected, modifiers. If a user does not know the diagnosis code, it is recommended that they choose the top result. Click on the desired result to proceed.

Showing 14 entries

#	Description	CPT/HCPC	Diagnosis	Total
3	(42830) ADENOIDECTOMY, PRIMARY; YOUNGER THAN AGE 12	42830	H6523,J352	2903.58
3	(42830) ADENOIDECTOMY, PRIMARY; YOUNGER THAN AGE 12	42830	J352	1161.95

The next screen will show a breakdown of all associated charge line items that are present on at least 70% of the claims searched. Users may uncheck any line items that they do not wish to have included in the estimate. If the user is unsure of which line items should be included, it is recommended that they leave all lines checked. If known, enter professional details such as modifiers, place of service, type of service, location, and physician. If unknown, leave the fields blank. Click **select** to add the service to the patient's **selected procedures** column.

Showing 2 entries

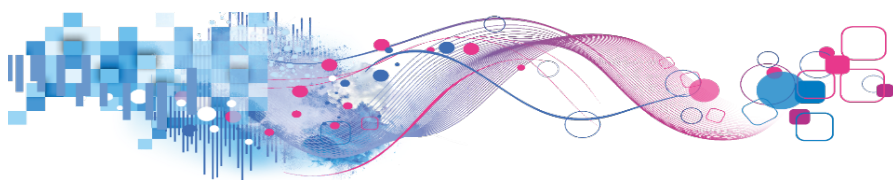
Procedure: 42830
Diagnosis: (H6523,J352)*

Total Charges: \$2903.58

All of these Charge Line items came back associated with your search. Review and uncheck the Charge Line item if it is not applicable to the patient.

Select **Back**

Description	CPT/HCPC	Modifiers	Place of Service	Type of Service	Additional Info	Units	Charge	Use <input checked="" type="checkbox"/> All
ADENOIDECTOMY, PRIMARY; YOUNGER THAN AGE 12	42830	<input type="text"/>	24	Select	Select	1	1161.95	<input checked="" type="checkbox"/>
TYMPANOSTOMY (REQUIRING INSERTION OF VENTILATING TUBE), GENERAL ANESTHESIA	69436	50	24	Select	Select	1	1741.63	<input checked="" type="checkbox"/>



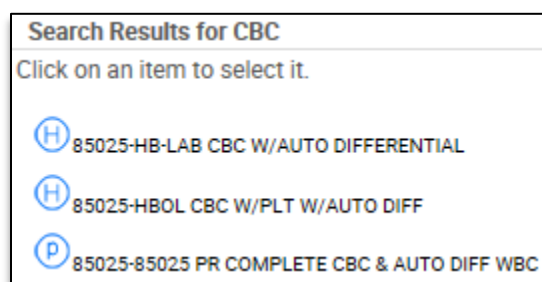
Combined Estimates

Combined Estimates allow users to add both hospital (facility) procedures and professional services to the same estimate. Facilities utilizing PE's combined estimates functionality will have access to the same search options detailed earlier in this guide. However, when utilizing these search options for combined estimates, users will be prompted for additional information.

Chargemaster/Template/Easy Search

Let's take a look at the example below, which uses the Chargemaster Search. Users at facilities using combined estimates will see results marked with either (P) for professional or (H) for hospital to indicate whether the specific result is a professional or a hospital charge.

Click on an item to select it.




Search Results for CBC

Click on an item to select it.

- (H) 85025-HB-LAB CBC W/AUTO DIFFERENTIAL
- (H) 85025-HBOL CBC W/PLT W/AUTO DIFF
- (P) 85025-85025 PR COMPLETE CBC & AUTO DIFF WBC

If the result selected is classified as a professional charge, users of the **Chargemaster**, **Template**, and **Easy Search** will be prompted with the following screens when selecting an item.

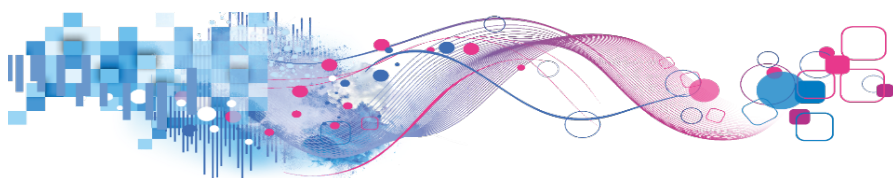
Enter the diagnosis (if known), or leave the default diagnosis (Z7689) in the diagnosis field and click **ok**. Please note that the diagnosis screen may not display in all cases.



Diagnosis

Z7689 X OK

(Z7689) Persons encountering health services in other specified circumstances



The **professional details** prompt will display. If known, enter the professional details, such as location, physician, modifier(s), type of service, place of service, and participating/non-participating. If unknown, leave the fields blank. Click **add** to add the service to the patient's **selected procedures** column.

Professional Details

Location

Select One

Physician

Par

Non Par

Modifiers

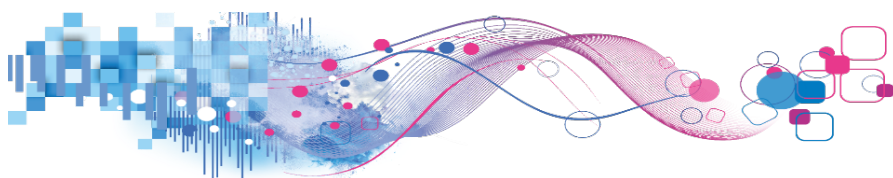
Type Of Service

N/A

Place of Service

N/A

Add



Claims Search

When using **Claims Search** for combined estimates, select a **patient type** from the dropdown menu, then search by CPT or ICD. Additionally, users may search by DRG for inpatients. In the example below, a search for CPT 45380 is shown with a result of 2921 **hits**. The number of hits is the number of claims that match the specified CPT code.

The screenshot shows the 'CLAIMS SEARCH' header. Below it, 'Patient Type' is set to 'Outpatient' with a dropdown arrow. A 'Search' box contains 'CPT/HCPC' and '45380' with a clear 'x' button. Below the search box, a dropdown menu is open, showing the result: '(45380) (2921 hits) COLONOSCOPY, FLEXIBLE; WITH BIOPSY, SINGLE OR MULTIPLE'. A mouse cursor is pointing at the dropdown arrow on the right side of the result box.

Choose any additional restrictions, such as diagnosis, attending provider, or location. Place a checkmark in the **include modifiers/POS details** box to separate results by modifiers. Click **search**.

This screenshot shows the full 'CLAIMS SEARCH' form. The 'Patient Type' is 'Outpatient'. The 'Search' section has 'CPT/HCPC' set to '45380' and two empty input fields below it. The 'ICD Procedure' field is empty, and the 'Primary Only' checkbox is unchecked. The 'Additional Restrictions' section has 'Include Modifiers/POS Details' checked (highlighted with a red box), 'Include ER Results' unchecked, and a note: 'Note: Diagnosis codes with * denote ICD-10'. Below this, 'Diagnosis' is empty, 'Attending Provider' is 'All', and 'Location' is 'All'. The 'Primary Only' checkbox is also unchecked here. At the bottom right, there are 'Search' and 'Reset' buttons, with the 'Search' button highlighted by a red box.

The search results will display. Click on the relevant procedure grouping in the search results based on diagnosis and/or revenue code. If this information is unknown, it is recommended that users pick the top result.

Claim Search Results					
Showing 50 entries					
#	Description	CPT/HCPC	Rev Code	Diagnosis	Total
666	(45380) COLONOSCOPY, FLEXIBLE; WITH BIOPSY, SINGLE OR MULTIPLE	45380	750	Z1211	2491.43
122	(45380) COLONOSCOPY, FLEXIBLE; WITH BIOPSY, SINGLE OR MULTIPLE	45380	750	D122	5072.18

A breakdown of all associated *hospital (facility)* charge line items that are present on at least 70% of the claims searched will be displayed. Users may uncheck any line items that they do not wish to have included in the estimate. If the user is unsure of which line items should be included, it is recommended that they leave all lines checked.

To view professional charges, click **professional search** to view all professional charges associated with the facility charge.

Claim Search Results

Showing 4 entries

Diagnosis: (Z1211)*

Total Charges: \$2491.43

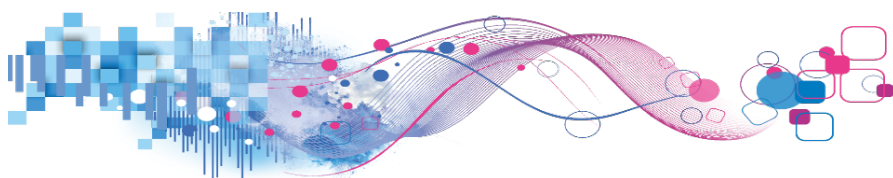
Select Back

All of these Charge Line items came back associated with your search.


Review and uncheck the Charge Line item if it is not applicable to the patient.

Description	CPT/HCPC	Modifiers	Rev Code	Units	Charge	Use <input checked="" type="checkbox"/> All
LEVEL IV - SURGICAL PATHOLOGY, GROSS AND MICROSCOPIC EXAMINATION ABORTION - SPONTANEOUS/MISSED ARTERY, BIOPSY BONE MARROW, BIOPSY BONE EXOSTOSIS BRAIN/MENINGES, OTHER THAN FOR TUMOR RESECTION BREAST, BIOPSY, NOT REQUIRING MICROSCOPIC EVALUATION OF SURGICA	88305		310	1	196.00	<input checked="" type="checkbox"/>
INJECTION, MIDAZOLAM HYDROCHLORIDE, PER 1 MG	J2250		636	6	43.44	<input checked="" type="checkbox"/>
INJECTION, FENTANYL CITRATE, 0.1 MG	J3010		636	1	11.49	<input checked="" type="checkbox"/>
COLONOSCOPY, FLEXIBLE; WITH BIOPSY, SINGLE OR MULTIPLE	45380		750	1	2240.50	<input checked="" type="checkbox"/>

Professional Search



Select a location (required). Use the checkboxes on the right to select or deselect any professional charges that should or should not be reflected in the estimate. If known, enter professional details such as modifiers, place of service, type of service, specialty, and units. If unknown, leave the fields blank.

Location * Select One 

Showing 18 entries

Professional Total Charges: \$12370.81

Description	CPT/HCPC	Modifiers	Place of Service	Type of Service	Specialty	Units	Charge	<input checked="" type="checkbox"/>
ANESTHESIA FOR UPPER GASTROINTESTINAL ENDOSCOPIC PROCEDURES, ENDOSCOPE INTRODUCED PROXIMAL TO DUODENUM	00740	P2:QS::	22	Select	Select	77	990.22	<input checked="" type="checkbox"/>
ANESTHESIA FOR LOWER INTESTINAL ENDOSCOPIC PROCEDURES, ENDOSCOPE INTRODUCED DISTAL TO DUODENUM	00810	QX:QS::	22	Select	Select	66	452.10	<input checked="" type="checkbox"/>

Click **select** to add the service to the patient's **selected procedures** column.

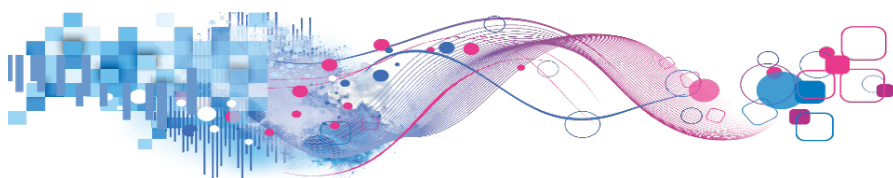
Showing 4 entries

Diagnosis: (Z1211)*

All of these Charge Line items came back associated with your search.
Review and uncheck the Charge Line item if it is not applicable to the patient.

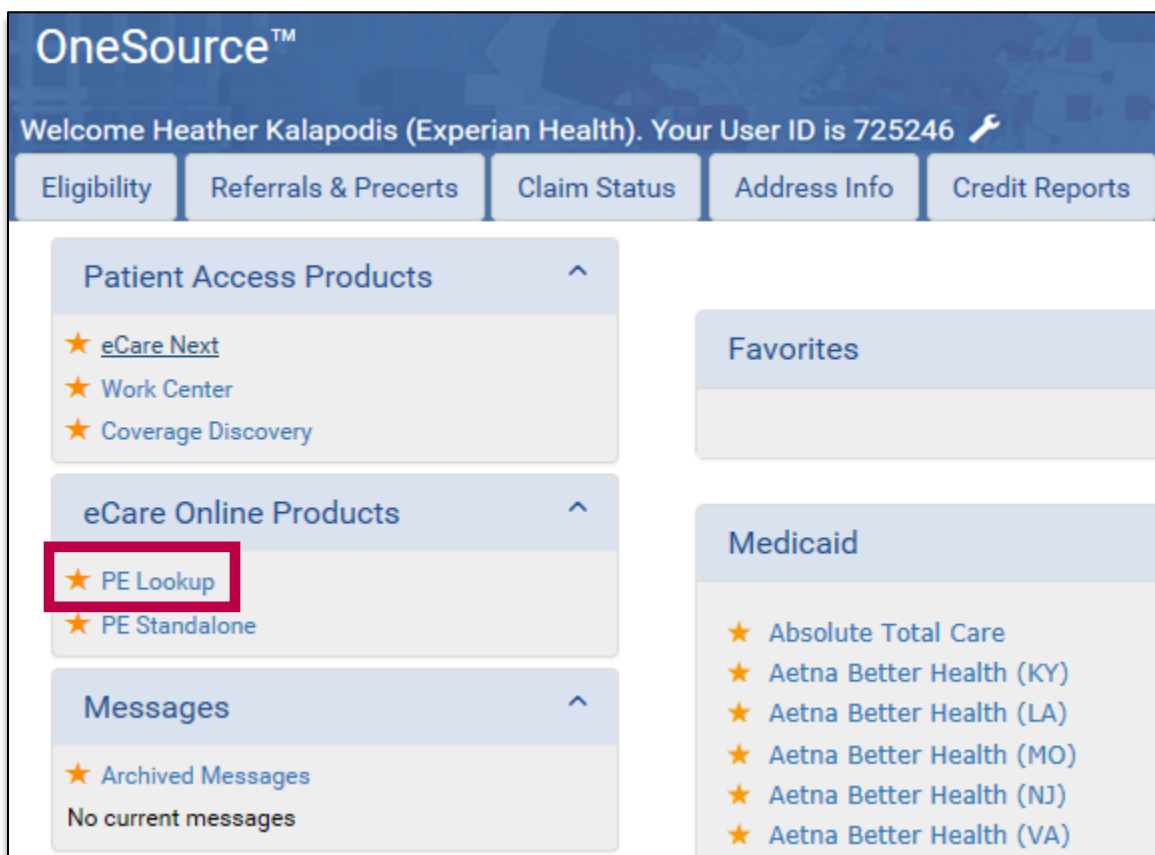
Total Charges:
\$2491.43

Select Back



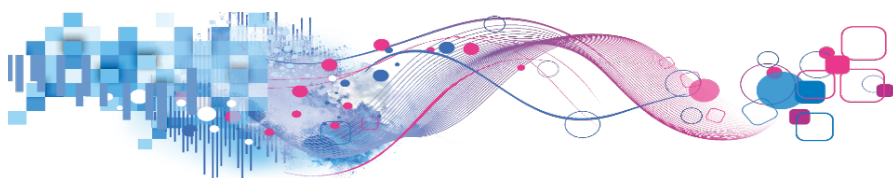
Estimate Lookup

At times, it may be necessary to reference an estimate that was previously run for a patient. For example, a patient may call with a follow-up question about an estimate that they received the other day. To look up a previously run estimate, users may search for the patient in the eCN work queue or use the **PE Lookup** link in OneSource.



The screenshot shows the OneSource™ user interface. At the top, it says "Welcome Heather Kalapodis (Experian Health). Your User ID is 725246" with a key icon. Below this is a navigation bar with tabs: Eligibility, Referrals & Precerts, Claim Status, Address Info, and Credit Reports. The main content area is divided into several sections:

- Patient Access Products** (with an expand/collapse arrow):
 - ★ [eCare Next](#)
 - ★ [Work Center](#)
 - ★ [Coverage Discovery](#)
- eCare Online Products** (with an expand/collapse arrow):
 - ★ [PE Lookup](#) (this link is highlighted with a red box)
 - ★ [PE Standalone](#)
- Messages** (with an expand/collapse arrow):
 - ★ [Archived Messages](#)
 - No current messages
- Favorites** (empty section)
- Medicaid**:
 - ★ [Absolute Total Care](#)
 - ★ [Aetna Better Health \(KY\)](#)
 - ★ [Aetna Better Health \(LA\)](#)
 - ★ [Aetna Better Health \(MO\)](#)
 - ★ [Aetna Better Health \(NJ\)](#)
 - ★ [Aetna Better Health \(VA\)](#)



Enter the patient's search criteria and click **search**. Please note that it is not necessary to complete all fields. Users may search using any combination of available search criteria.

experian. health		Lookup	PPE	Worklist	Profile Manager
Patient Payment Estimator Lookup					
Reference Number	<input type="text"/>				
Patient Last Name	<input type="text"/>				
Patient First Name	<input type="text"/>				
DOB	<input type="text"/>				
Patient Account Number	<input type="text"/>				
Patient SSN	<input type="text"/>				
Generated From Date	<input type="text" value="02/19/2017"/>				
Generated To Date	<input type="text" value="03/21/2017"/>				
					<input type="button" value="Search"/>

Troubleshooting

Sometimes, an estimate result may not turn out the way you had expected. In this section, we will take a look at two issues that users may encounter when running estimates: Estimates with **missing benefits** and **changing coverage**.

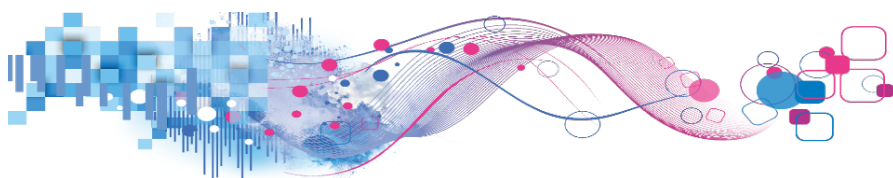
Missing Benefits

From time to time, a particular benefit may be listed on the estimate as a question mark. This indicates that no data was available on the coverage response for that particular benefit. This is considered normal, as not every payer returns every benefit for each service category, and should not in itself be cause for concern. If you have any questions about the benefits that appear in this section, you can consult the coverage chevron.

In the example below, there is a question mark listed in the co-pay field in the image on the left. A review of this patient's eligibility response on the coverage chevron (*right*) shows that this patient is subject to a 15% co-insurance for this service type, but there is no mention of a copay. One can reasonably infer from this eligibility response that the service is subject to co-insurance, but not a copay. Some payers may specifically list the copay as \$0, but others choose to not mention it, as we see here. However, PE still has enough information to generate a robust estimate in this example.

Service Categories	Hospital Inpatient >
Payer	Primary
Total Adj Charges	\$61,551.48
Co-Pay	?
Co-Insurance	15.00%
Individual Deductible	\$500.00
Individual Deductible Remaining	\$0.00
Family Deductible	\$1500.00
Family Deductible Remaining	\$1000.00
Individual Out of Pocket	\$2000.00
Individual Out of Pocket Remaining	\$1446.76
Family Out of Pocket	\$6000.00
Family Out of Pocket Remaining	\$5379.65
Estimated Patient Responsibility	\$1,446.76 ⓘ

Hospital - Inpatient [IN]	
Hospital - Inpatient	
% Co-Insurance 15 % per Visit	
Coverage	Individual
Time Period	Visit
Inpatient Hospital	DAILY ROOM AND BOARD
Deductible	
Individual	\$500.00 per Calendar Year
Benefit Begin Date	01/01/2017
Inpatient Hospital	DAILY ROOM AND BOARD
\$0.00	Remaining
Inpatient Hospital	DAILY ROOM AND BOARD
Family	\$1,500.00 per Calendar Year
Benefit Begin Date	01/01/2017
Inpatient Hospital	DAILY ROOM AND BOARD
\$1,000.00	Remaining
Inpatient Hospital	DAILY ROOM AND BOARD

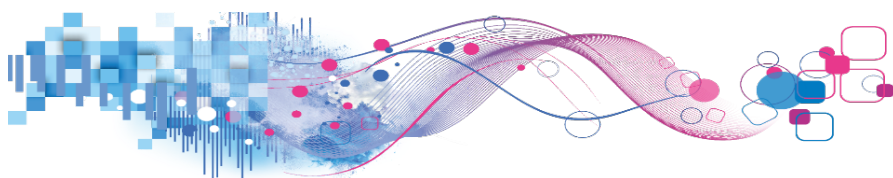


In some cases, the coverage response may lack information that is critical to the creation of an accurate estimate. This occurs when the payer does not provide detailed benefit information in their response. The affected benefit box(es) may be shaded red to help users identify crucial missing information, as shown below. In these scenarios, a phone call to the payer may be required to verify the patient's specific benefits. After obtaining the necessary benefit information from the payer, manually enter the values and click recalculate to generate an estimate.

Service Categories	Outpatient Surgical >
Payer	Primary
Total Adj Charges	\$645.00
Co-Pay	<input type="text"/>
Co-Insurance	<input type="text"/>
Individual Deductible	<input type="text" value="\$350.00"/>
Individual Deductible Remaining	<div></div>
Family Deductible	<input type="text" value="\$700.00"/>
Family Deductible Remaining	<div></div>
Individual Out of Pocket	<input type="text" value="\$2000.00"/>
Individual Out of Pocket Remaining	<div></div>
Family Out of Pocket	<input type="text" value="\$3000.00"/>
Family Out of Pocket Remaining	<div></div>
Estimated Patient Responsibility	<div></div> ⓘ

Recalculate

Previous



Change Coverage

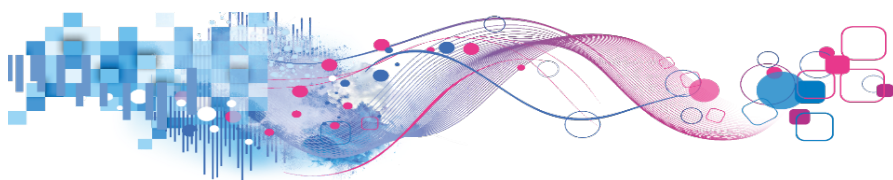
By default, PE utilizes benefit information from the first tab listed on the coverage chevron. However, there may be scenarios when it is necessary to use information from one of the other tabs. For instance, let's say that initially, Mr. Smith provided an Aetna insurance card, but upon running eligibility, we discovered that his coverage with Aetna was no longer valid. After further conversation with the patient, we find out that he has recently switched to Cigna. We run an eligibility check and find that he does have active coverage through Cigna. PE can be directed to utilize the Cigna information in the second tab on the coverage chevron (rather than the inactive Aetna information) by selecting the plan from the **coverages dropdown**.

In the example below, no response was received from United Healthcare, and the transaction was terminated.

<input checked="" type="checkbox"/> UHC Med AdvantagePPO (1860)	<input checked="" type="checkbox"/> Passport Found UHC (UHC)
No Response received - Transaction Terminated Please Resubmit Original Transaction	

However, active coverage was later found and is available under the second tab.

<input checked="" type="checkbox"/> UHC Med AdvantagePPO (1860)	<input checked="" type="checkbox"/> Passport Found UHC (UHC)
Eligible	



To direct PE to look at the benefits under this second tab, we will use the coverages dropdown to select the desired eligibility response. This dropdown will appear at the top of the estimate once the procedures have been selected. After making a new coverage selection, click **resubmit** to allow the estimate to recalculate.

Please note that this dropdown is permissions-based and may not be enabled at all facilities.



The screenshot shows a web interface titled "ESTIMATE". Below the title, there is a label "Coverages:" followed by a dropdown menu. The dropdown menu is open, showing two options: "UnitedHealthcare (1860) - TIMEOUT" and "UnitedHealthcare (UHC) - ACTIVE COVERAGE". Below the dropdown, there is a green checkmark icon, the text "Step 1: Pick Procedures", and a red button labeled "Resubmit".

Customer Support

For additional inquiries, please contact Experian Health Customer Support by creating a case in the **Customer Support Portal**, or by e-mail or phone. Customer Support is available 24/7.

E-mail: Customer.Support@ExperianHealth.com

Phone: (866) 854-6796

Experian Health Product Dashboard: <http://www.experianhealthproductdashboard.com>

Payer Status: <http://www.passportssystemstatus.com>