

# Centricity Business (CB) – Coding Services eBinder

This eBinder has links to quick reference guides (QRGs) that are specific to the work you perform in the Coding Services (CS) group. The guides are listed by topic under the headings below. To open a QRG click the underlined/blue link. Feel free to use the guides as an online reference or to print out for your use. (Utilize the zoom feature when reading online, to clearly view the graphics.)

*New Employees: Please work through the Essentials guides listed below in CB for practice. If you have not been sent a login to CB to go through the guides, contact Susan Lindgren via email or ext.37823. Watching the movies and following through the Essentials guides are required before attending new hire training.*

## Essentials

[Login/Logoff User Guide](#)—walks you through the steps of correctly logging in and out of Centricity Business

[Getting Started User Guide](#)—walks you through the basic features of using CB

[Navigation](#)—navigation tips for CB

[Advanced Search and Select Patient](#)—ways to search for a patient in CB

## Guides Useful to Your Role

[Invoice Inquiry](#)—numerous actions and methods to inquire about invoices in CB

[Filtering ETM Task Notes](#)—walks you through the steps for filtering out the system generated task notes in ETM

[Viewing More than Four Dx Codes](#)—shows you the steps to view Dx codes 5-10 if applicable

[Creating a Visit While in TES Charge Entry/Editing](#)—walks you through entering a visit from TES

[Managing Visit-Level Insurance Using IV Action Code](#)—walks you through adding, deleting, changing insurance

[Accessing BAR Dictionaries](#)—steps for accessing BAR dictionaries

[Viewing Fee Schedules](#)—steps for viewing fee schedules

[Viewing a TES Audit Trail](#)—steps for viewing a TES Audit Trail

## Enterprise Task Manager (ETM)—What It Is and Best Practices

[ETM Concepts](#)—overview of what ETM is

[Working in ETM](#)—features to utilize working in ETM

[ETM Preview Pane](#)—What is the Preview pane?

[ETM Instructions Pane](#)—What is the Instructions pane?

[ETM Notes User Guide](#)—viewing and entering ETM notes

[Steps for Working a Task in ETM](#)—fundamental steps to work a task in ETM

## TES

[TES Charge Entry](#)—entering charges into TES

[TES Editing](#)—editing TES charges in CB

## BAR Charge Correction

[Creating a Basic Visit](#)—steps for creating a new visit and adding insurance plans for charge correction

[BAR Charge Correction Basics](#)—the steps for basic BAR charge correction procedures

[BAR Charge Correction – Moving Invoices](#)—steps for moving invoices from donor to recipient account, etc.

[BAR Charge Correction – Splitting an Invoice then Performing a Charge Correction](#)—steps for splitting an invoice and then performing a charge correction

## EDM (Electronic Document Manager)

[EDM Scanning a Document](#) (for document scanners only)

[EDM Indexing a Document](#) (for document scanners only)

[EDM Viewing Scanned Documents](#) (all)

## **Handouts**

[Patient Lookups and Date and Time Formats](#)

[Navigation using Keyboard Shortcuts](#)

[VM Action Codes and Descriptions](#)

[Visit Types Used at UPI](#)

[ETM Note Types](#)

[Invoice Inquiry Action Q Filter Commands](#)

[Notes Handout](#)

[5.3 Upgrade User Guide](#)