Centricity Business (CB) – Patient Services eBinder

This eBinder has links to quick reference guides (QRGs) that are specific to the work you perform in the Patient Services (PS) 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

Dictionaries – accessing and understanding the most commonly used dictionaries in CB.

Guides Specific to your Role

Statement and Budget Plans—steps for viewing statements and setting up budget plans

BAR Case Management—step by step instructions for creating a case and attaching to a visit

Payment Posting (Part 1) User Guide—step-by-step instructions for payment posting using Line Item

Payment Posting (Part 2) User Guide—step-by-step instruction for payment posting using Additional Transactions

Invoice Inquiry—numerous actions and methods to inquire about invoices in CB

Demand a Claim— reasons why and steps to demand a claim in CB

Unlink and Link an Invoice and Visit—steps for unlinking an invoice from an incorrect visit and steps for linking an invoice to a visit

Viewing More than Four Dx Codes—shows you the steps to view Dx codes 5-10 if applicable

Viewing Fee Schedules—steps for viewing fee schedules

Viewing a TES Audit Trail—steps for viewing a TES Audit Trail

Processing Refunds Workflows for Patient Services

Refund Process User Guide - PSD

Refund Process User Guide - PSD Transplant

EDM (Electronic Document Manager)

EDM Scanning a Document (for document scanners only)

EDM Indexing a Document (for document scanners only)

EDM – Invoice and Batch Level Documents

ETM (Enterprise Task Manager)

ETM: Customer Service – steps to navigate the Customer Service tab in ETM

ETM: Filtering Task Notes – Steps to filter out system generated notes.

ETM: VM Alerts Transplant – Steps to process transplant tasks in ETM

Handouts

Patient Lookups and Date and Time Formats

Navigation using Keyboard Shortcuts

VM Action Codes and Descriptions

ETM Note Types

Invoice Inquiry Action Q Filter Commands

Notes Job Aide

5.3 Upgrade User Guide