

Centricity Business (CB) – Business Services eBinder

This eBinder has links to quick reference guides that are specific to the work you perform in the Business Services (BS) group. The guides are listed by topic under the headings below. To open a document click the underlined/blue link. Feel free to use the guides as an online reference or to print out for your use.

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 Useful to your Role

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

[Payment Posting \(Part 1\) User Guide](#)—step-by-step instructions for line item payment posting

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

[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

[Bad Debt Module](#)— The Bad Debt Module provides a method of managing bad-debt receivables

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

[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

[Posting to a Charge Corrected Invoice](#)—steps for posting payments to a charge corrected invoice

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

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

[Working in ETM](#)—walks you through features to utilize when 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

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)

[EDM Deleting a Batch](#)

Payment Posting Workflows

[Auto Cash Payment Posting WF](#)

[Copay Pre Payment Posting WF](#)

[Side-by-Side Payment Posting WF](#)

Pre Payment Workflow

[Pre Payment WF](#)

Processing Refunds Workflows

[Refund Process User Guide - ROD](#)

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 Job Aide](#)

[5.3 Upgrade User Guide](#)

[US Bank Payment Consolidator](#)