CBS NAVICERT V1.97

CBS Navicert Instruction Manual



© Complete Billing Systems Box 401 Regina, Sk. Canada S4P 3A2 Phone 306.569-1434 • Fax 306.789-6614

Last Revised: June 24, 2007

© 1984 - 2007 Complete Billing Systems All Rights Reserved

Technical Support: Regina Area: 306.569.1434 Province Wide Toll Free: 800.563.4666

Copyright Notice and Warranty

Information in this document is subject to change without notice. Companies, names, and data used in examples herein are fictitious unless otherwise noted. No part of this document may be reproduced or transmitted in any form or by any means, electronic or mechanical, for any purpose, without the expressed written permission of Complete Billing Systems Inc.

© 1984 - 2007 Complete Billing Systems Inc. All rights reserved.

The CBS Navicert EMR License Agreement, included with the product, specifies the permitted and prohibited uses of the product. Any unauthorized reproduction or use of the product, or breach of the terms and conditions of the License Agreement, is forbidden. The Navicert License Agreement sets for the only warranties applicable to the product and documentation. All warranty disclaimers and exclusions set forth therein apply to the information contained in this document.

Navicert License Agreement and Limited Warranty

You should carefully read the following terms and conditions. Your use of this software package indicates your acceptance of them. If you do not accept and agree to all of these terms and conditions, you should promptly contact Complete Billing Systems and arrange to return the software and your license fee will be refunded.

CBS Navicert EMR is a proprietary product of Complete Billing Systems Ltd and is protected by copyright laws. Title to the software shall at all times remain with Complete Billing Systems. The software is licensed by Complete Billing Systems to you for your use strictly in accordance with the following terms and conditions. Source code licenses are not available. This agreement supersedes any previous agreements with Complete Billing Systems Ltd.

License :

Use the software on a single computer or single computer network to serve the needs of a single doctor or a group of doctors operating at one physical address for one year from the date of purchase. Following the initial year of use you may apply for an additional license either month by month or for a full year. Complete Billing Systems Ltd is under no obligation to issue additional licenses. Should Complete Billing Systems elect to issue an additional license, Complete Billing Systems Ltd will charge a fee for this license. Complete Billing Systems Ltd reserves all rights with regards to the amount of this fee. Complete Billing Systems Ltd. The hours of operation for telephone support are set at the sole discretion of Complete Billing Systems and may be altered without notice as necessary. In addition, Complete Billing Systems Ltd may, at their sole discretion, provide other forms of support (fax, internet, e-mail).

You may make backup copies of the software and store these copies away from the physical address but you may not concurrently run these copies without paying for and obtaining a license for the use of the software. You may transfer the license to use this software to another party at another physical location provided you obtain the prior permission of Complete Billing Systems Ltd for the transfer however you may not continue to operate the software once the software has been transferred.

- You may not loan or rent your software to any third party.
- You may not modify, decompile, disassemble, reverse engineer or translate this software.
- You may not reproduce, modify or translate this software documentation without permission of Complete Billing Systems Ltd.
- You may not remove copy write notice.
- You may not distribute any component part of the software or databases supplied by Complete Billing Systems Ltd.
- You may not use your software at more than one physical location without purchasing an additional software license.

If you do any of the foregoing, your license and this agreement are automatically terminated. Such termination shall be in addition to and not in lieu of any criminal, civil or other remedies available to Complete Billing Systems Ltd.

Term:

You may terminate your license and this agreement at any time by destroying the software and any documentation together with all copies in any form. The license will also terminate automatically if you fail to comply with any term or condition of this Agreement, in which event you agree to destroy the Software together with all copies in any form, and to provide us upon our request with written certification of such destruction.

Limited Warranty/Limitations of Remedies:

Except as specifically stated in this agreement, the software and software documentation is provided and licensed "As Is" without Warranty of any kind, either expressed or implied, including but not limited to the implied warranties of merchantability and fitness for a particular purpose.

Complete Billing Systems Ltd warrants for a period of 90 days from the date of delivery to you that (1) the Software will substantially conform to the Software documentation and specifications published by Complete Billing Systems Ltd, and (2) the media on which the Software is furnished and the documentation will be free from defects in materials and workmanship under normal use. Download links for the software will remain valid for this period of time. Complete Billing Systems Ltd. Does not warrant that the functions contained in the Software will meet your requirements or that the operation of the Software will be either error free or appear precisely as described in the Software documentation. The Software must be used with the computer hardware and operating system for which it is designed, and in accordance with the Software documentation and specification requirements.

Complete Billing Systems Ltd will replace defective media and make software available for electronic delivery during the period of time the software is under license.

In no event will Complete Billing Systems Ltd be liable to you for any damages, including without limitation lost profits or revenues, loss of data, business interruption loss, recovery or substitution costs, or claims by third parties, or other indirect incidentals or consequential damages, arising out of the use of or inability to use the Software, even if Complete Billing Systems Ltd has been advised of the possibility of such damages. In no case shall Complete Billing Systems Ltd liability exceed the amount of the license fee paid by you for the Software.

This limited warranty gives you specific legal rights. Some jurisdictions provide other rights, and some jurisdictions do not allow the exclusion or limitation of implied warranties or limitations of liability for incidental or consequential damages. As a result, the above limitations and/or exclusions may not apply to you.

General:

This agreement is governed by the laws of the Province of Saskatchewan and the country of Canada. By using this product, you acknowledge that you have read this agreement, and by using this software package indicate your acceptance of it's terms and conditions. You also agree that it is the complete agreement between us and that it supersedes any prior information or representations you received relating to the subject matter of this agreement.

Table of Contents

Section I - Billing

Overview	1
Starting Navicert	2
Signing In to Navicert	2
Creating New Users	2
The Navicert Main Menu	4
Toolbar	5
Patient File Menu	6
Enter Services	6
Entering a New Patient	7
Adding a Photo	9
Patient Chart System	9
Patient Notes	10
Referrals	11
Appointments	13
Billing History	13
Additional Patient Information Buttons	11
Recall Eurotion	1/
The Medical Billing Screen	14
Peferring Dester	15
Adding a new referring deater	10
Tracting Depter	10
Discussion Carla (ICD Carla)	10
Diagnostic Code (ICD Code)	10
Adding a new Diagnostic Code	10
Location Code & Premium Billing	1/
Visit Date	18
Paying Agent	18
Service Code	18
Looking up a service code	18
75% and 50% Rule	19
Remarks	19
Third Party Billing	20
Printing Invoices	21
Quick Keys	21
Quick Calculator	21
Chiropractic Billing Screen	22
Chiropractic DPAY & 99U Code	23
Hospital In-Patient Services	24
Out of Province Patients	•
25	
List/Correct Services	26
MSP Menu	27
Prepare Billings (Send billings to MSP)	27

Section I – Billing (Continued...)

Prepare Third Party Claims	27
Starting a new billing period	27
Transfer Billings to MSP	28
Submission Methods	29
Internet Submission	29
Validation Report	32
PC-Anywhere	34
Resending Billings	36
Return File	37
Internet Return	38
PC-Anywhere	39
Printing The Return File	40
Parts of the Return File	40
Resubmitting a Claim	42
Third Party Menu	43
Reconcile Payments	43
Accounts Receivable	45
Duplicate Receipt	46
Misc. Menu	47
Examine History	47
Find Claim By Number	48
Help Menu	48
Check for On-Line Updates	48
Contact Technical Support	49
Visit Us On-Line (Web Site)	49
Section II - Appointments	
Appointment Tab	50
Setting up a schedule	50
Set Individual Days	53
Booking an Appointment	54
Selecting a Doctor	54
Entering a New Patient via the Appointment System	55
Right Click Menu	55
Bill	55
Block	55
Unblock	57
Сору	57
Delete	58
Edit	58
Insert	58
Paste	58

Move

Wipe

59

59

Section II – Appointments (Continued)	
Scrolling Through A Day	59
Arrived and Seen Buttons	59
Additional Notes	60
Selecting The Appointment Date	60
Today Button	60
Month Button	61
Clinic Calendar	61
Tool Bar Items	62
Find Appointment	62
Print	62
Preview of Appointment Sheet	63
Waitlist	64
Search	64
Add Patient	64
Remove Patient	64
Fdit	64
Book Appointment	64
Dook Appointment.	64
Find Type	65
Freed Wey	65
Uow 7 Dave	65
View / Days	05
VIEW / DOCLOTS	00

Section III

Electronic Medical Records Tab	67
Select The Patient	67
Start New SOAP Note (Using the Wizard)	68
Presenting Complaint Button	69
Subjective Symptoms	70
Objective Physical Exam Findings	70
Vitals	71
Assessment	71
Plan	72
Medication	73
Print Prescription	74
Specialist Referral	75
Treatment	76
Lab Tests	76
Print Lab. Req	76
X-Ray	77
Print X-Ray Req	77
Other Treatment	78
Completed SOAP Note	78
Clinic Note	79
Templates	80
Creating New Template	80

Section III - EMR (Continued ...)

Questions	80
Answers	80
Creating New Template Note	82
Review Recent Visits	83
Patient Notes	83
Current Summary	84
Past Summary	84
Additional Info	85
I abe	85
Scope	86
Import Scons	87
Eaves	88
Mise Documents	88
	00
Section IV - Word Processing	89
File Menu	90
Fxport	90
Page Setup	90
Drint Draview	90
Drint	00
F dit Many	90
Maaraa	90
Macros	91
view Menu	92
Insert Menu	92
Envelope Printing	92
Format Menu	93
Table	93
Options	93
Window	94
Word Processing Templates	94
Template Field Names	96 - 97
Making a Template	98
Working with Fields (Template Menu)	99
Select a Base Template	99
The <blank></blank> field	99
Section V - Utilities	
Utilities Tab	100
Address Labels	100
Backup / Restore Database	101
Check for Updates	108
Cull Data	109
Data Import / Export	110
Edit Data Files	112
Merge Charts	114
Quick Keys	115

Section V – Utilities (Continued...)

Recall List (Physician)	115
Reindex Database	. 117
Repair/Reindex Database	. 117
Site Certificate	117
Statistics	118
Submission Manager	119
System Settings	121
Update Staff	122
Section VI Messages	127
Sending Messages	127
Message History	127
Receiving Messages	128

Navicert - "A Clean Bill Of Health"

CBS Navicert is a well-tested and simple to use package. In just a few minutes you will know enough to use the basic features of this package.

Navicert is a simple to use package. This manual will assume that your Navicert package has been installed on your computer for you. If you need assistance installing your package please contact our technical support line.

This manual assumes that you are familiar with the basic features of Microsoft Windows. You should already know how to start a program in Windows and how to turn your computer on and off safely. Terms like "double-click", "Right Click" and "drag-and-drop" should be familiar to you. If you are not familiar with Windows you may wish to review the documentation that came with your computer or even sign up for an introduction to Windows course.

Overview:

CBS Navicert is a full featured Office management package. Navicert has a number of modules including Billing, Appointments, Word Processing, Messaging and Paperless Office features.

Section I: Billing

Be ach time a patient sees a doctor, the doctor provides a "service" to the patient. Each service must be typed into Navicert. Usually this is done daily. Navicert stores the details of the service for about 2 weeks and then sends the list of services (submission file) to Sask Health. About a week later Navicert will connect with Sask Health and pick up a list of what was paid and what was rejected (return file). Once you know how to enter services, prepare a billing file and read a return file you will know the basics of Navicert billing. Naturally there are a number of other features in the program and these are covered later in the manual. There is one critical function that you MUST DO every single day without fail. You must make a backup of your data files. This function is described in this manual. If you have any questions about Navicert or problems with the program please do not hesitate to call our office at any time.

Starting CBS Navicert



To Start CBS Navicert find your CBS Navicert icon on your desktop and double click on it. You can also click on the START button then click on Programs, click on the Navicert folder and finally click on CBS Navicert.

Signing In to Navicert



When you first start Navicert you will be asked to sign in. While it is possible to disable sign-in and use Navicert without a password it is not recommended. Legal requirements require health professionals to make every reasonable effort to protect health care records and that starts with a password to access the data. When you first start Navicert you will have only one user – ADMIN. The password for the ADMIN account is also ADMIN. Clearly this is not secure. Anyone who knows

anything about computers will instantly guess this password. As a first order of business you must change the ADMIN password and set up your user accounts.

Type ADMIN then click the Add/Edit Users button. You will see this screen:

i Add/Edit User	
ADMIN	•
User Name	ADMIN
Initials	RBH
Password	RANNAN
Confirm Password	
	 Administrator Level Standard User Level
Save Save	Delete

Click the drop-down and select the ADMIN account. Next you must enter the new ADMIN password. Confirm it in the Confirm Password box then click SAVE.

Please do not forget the ADMIN password because there is NO WAY to recover it if it is ever lost. You will be forever locked out of your data and that's that. No more billings. No more appointments. All patient records lost forever. Your only hope would be an old backup with a password you remember.

Honest... we can't emphasize this enough. DO NOT forget your ADMIN password.

You will notice that there are two levels for accounts. One is the Administrative level and the other is Standard User Level. Generally you should only have one Administrative Level account (the Admin account) and all other accounts should be Standard User Level accounts.

The Admin account can create new users, change passwords and delete users. Only the highest level administrative people at your clinic should have access to this account. All other accounts should be Standard Level. There have been unfortunate cases of disgruntled ex-employees causing harm to a business because they were given an Administrative password. Likewise innocent ex-employees have been suspected of causing problems at a business because they had access to Administrative passwords. For safety of all concerned it is best that only the highest level users have access to the Administrative Level password.

Once the ADMIN account has been secured with a password you can set up the various user accounts for your staff. Each user of the system should be given an account with a password. Note that it is possible to assign an account with a blank password but this is not recommended because it is not secure.

🛱 Add/Edit User	
Click Save to	add this user 🗾 🛃
User Name	Sally Henderson
Initials	SH
Password	неконо
Confirm Password	HERKENEN
	Administrator Level Standard User Level
Save Save	

To create a new account just click the New User button. Enter the user name, initials and password. Set the User Level to Standard and then click SAVE. Remember that it is not usually wise to freely hand out Administrator level accounts.

Once all accounts have been added you are ready to log in and use Navicert.

Importing CBS Classic Data Files

If you are upgrading from CBS Classic you will probably want to import all your old CBS data files. When your copy of Navicert is installed, the Navicert will run a setup wizard that will import your patient data. If you need assistance upgrading from CBS Classic please call our support line for assistance.

The Navicert Main Menu



The Navicert Main Menu consists of a series of tabs across the top of the screen. Each tab will start a different section of the program. For example there is the Billing tab, the Appointment Tab, the Electronic Medical Records tab and so on. We will begin with the Billing Tab.

Above the billing tab is a pull down menu. This menu changes depending on which Tab you have selected. As you click on a menu heading, Patient File for example, a number of sub-options appear such as Enter, List and Exit. Beneath the Billing Tab is a toolbar with small pictures. The toolbar allows instant access to the most common Navicert functions. The right margin of the program usually displays "Pending Services". The body of the main screen will display a graphic. Note that your graphic may look different from the picture displayed above as this graphic may be easily changed. The graphic functions as a screen saver and is usually programmed to change every few minutes.

Each menu item can be accessed by using the mouse or with the keyboard. Using the mouse is probably the most natural and easiest way to use the menu system.

To activate the menu by keyboard, tap the $\langle ALT \rangle$ key and release it. Then press the underlined letter for the menu item you wish to access (F for File, M for Miscellaneous, etc). You should see the menu drop down. You may then tap any underlined letter – or – use the arrow keys on the keyboard to highlight the menu entry you wish to use. Finally once the menu item is highlighted press the $\langle ENTER \rangle$ key to activate your selection.

The Toolbar

🥥 CBS Navicert	EMR v1.4 Site	e #367 TERM9	Now Display	ing: PICS\TEDD	YR09.JPG	
Patient <u>Fi</u> le <u>M</u> SP	<u>T</u> hird Party <u>M</u> iso	:. <u>H</u> elp E <u>x</u> it				
	Billing	The second secon	Appoint	tments	Ele	ectronic Medical Records
Services	List/Edit Services	Prepare Billings	Send or Pickup	Read Returns	Examine History	Find Claim by Number
Contraction of the local division of the loc	105-00-00					

The toolbar allows quick access to each of the major functions in the Billing portion of the Navicert program. Each picture in the toolbar represents an action.

Note: If you are unsure of the function of any toolbar item just hold your mouse still over the picture and a small help box will pop up.

Once they are used to using the Toolbar, most people prefer it over the menu system, however you can still use the menu system if you prefer.

For example, you can select Enter Services by clicking on the small picture of a cash register. If you prefer you can click on Patient File then click on Enter Services. Either option will take you to the same place.

Again, the tool bar changes depending on which tab you have selected.

Patient File Menu



Enter Services

The feature you will probably be using more than any other is the Enter Services option. Once you select this option, Navicert will guide you through the procedure necessary to record a patient visit. Remember that the visit is recorded on your computer and will be kept on your computer until the services are submitted to MSP for processing.

Simply entering the services will NOT result in payment – they must be prepared and submitted to MSP for payment. These steps are covered later but for now we will continue to examine the process of entering services.

Once you select Enter Services you will see:



If the patient's information is already stored in your computer you may enter the name of the patient or the Personal Health Number (PHN) for the patient. If entering the name you may enter the last name or even just a portion of the last name. If you enter SMITH a list of all patients named SMITH will be displayed.

To narrow the search a bit you may wish to enter the last name **followed by a comma** and then the first initial or name of the patient.

If you enter the patient's name, Navicert will check the database. If there is more than one matching name, Navicert will display a list of matching patients displayed on the Patient Browse screen.

🖻 Searchin	g Database			
ANSELL, J	EAN	F	Mar 01, 1909	182187896
AUSER, C	DLLEEN M	F	Oct 01, 1970	160190592
BARNARD	, LOUISE AUNE	F	Dec 01, 1964	130150746
BARRIE, E	ILEEN	М	Aug 01, 1951	170101754
BARRIE, M	IARIEKA LAUREL-ANN	F	Jan 01, 1987	100189083
BEESLEY,	GAIL J	F	May 01, 1942	100080529
BENNING,	DOREEN L	м	Mar 01, 1960	170132625
BEST, DAV	/ID RANCE	F	Jun 01, 1985	180232703
BIHOLAR,	KENNETH G	M	Jul 01, 1961	180143417
Last Name	BEESLEY			
First Name	GAIL J			(MM)
Sex	F DOB May 01, 1942			607
Doctor	1			1 Crit
PHN	100080529			AN NA
Address	7344 7TH 6\/F		AUS	SA ME
City/Prov				
Postal	CAT OT 1			
Users Dissus	541 011			
Home Friohe				
Work Phone			N	ew Exit
Ref. Doctor				

Use the arrow keys on the keyboard to scroll up and down through the list. You may use the Page Up and Page Down keys to more rapidly move through the list. As you scroll through the names, detailed information on the patient you are billing is displayed at the bottom of the screen. You cannot edit this information on this screen – it is just there to help you make sure you have the right patient.

Once you have highlighted the patient you wish to bill for, press the <ENTER> key on the keyboard. Once the patient is displayed on the screen you may also click on the patient with your mouse.

Entering a New Patient

If the patient information is not already entered into your computer you will need to enter the patient as a New patient. Just click on the NEW button either on the Enter Patient Name screen or on the Patient Browse screen.



When you click on NEW you will see a blank patient entry form.

🖻 Patient Info	ormation				
			Constal Nation		Pieture
PHN			ciencial notes	~	Ficture
Last Name					
First Name					
Doctor	_			~	
Date of Birth	Male Female	Last Dill	ing Nevt Appoint	ment	
Chart #					Photo Age:
General	Family Medical Misc.	Patient Note:	s Referrals	Appoin	tments Billing History
Address 1		Date	Туре		Description
Address 2					
City					
Province	Postal				
Home Phone					
Work Phone					
Cell Phone					
E-Mail					
Family Dr					
Referring Dr					
Specialist					
Misc Info 1					
Misc Info 2		Add	Note Copy Note		•
Misc Info 3		This area is for c	quick patient notes. U:	se EMR tab	for detailed patient records.
<u>B</u> ill	Label Edit New Save [elete <u>H</u> isto	ry <u>R</u> ecall P	<u>T</u> hird arty Info	Next Pt. Prev. Pt. Exit

Complete each line of the form by typing the required information and pressing ENTER or TAB to move to the next field.

The area at the top of the screen on the left consists of the most basic patient information. You must fill in the PHN, Last Name, First Name, Sex, Date of Birth and Doctor. You do not need to fill in a chart number but you may do so if you wish. All other information on this form is for clinic use only. It is not sent to MSP and entering it is optional.

The spot for DOCTOR is reserved for a number. The number is assigned to the doctors in your clinic at the time the program is installed. The first doctor entered will be doctor #1 while the next doctor will be #2, etc. If you know the doctor numbers in your clinic just type in the number. If you would like to see a list of the doctors in your clinic you may click on the drop down box to the right of the doctor list box.

The Birth Date is entered either by typing the number of the month (1) or the name of the month (January) or the abbreviation for the month (Jan). Next type the day the patient was born on. If the day isn't known just type 1 and the service will still be processed. Finally type the year the patient was born (63 or 1963).

E	i Patient Info	rmation
	PHN	J
	Last Name	
	First Name	
	Doctor	•
	Date of Birth	Male Female
	Chart #	
	General	Family Medical Misc.
	Address 1	
	Address 2	

Note: Two address lines are supplied but usually only the first line will be needed.

We should spend a moment and examine the various tabs and options on this screen in a bit more detail.

There are 4 tabs for information. General, Family, Medical and Misc. As you click each tab you will see additional fields you can fill in if you wish.

The Misc. tab allows you to make up your own fields and store them on the patient chart.

You will notice that Navicert allows you to enter a Photo into the patient's chart. For this feature you will need a Web Cam or similar camera attached to your computer.



Adding a Photo to the Patient Chart:



To add or update a patient photo just click the Photo Button. You will see a screen like this (well hopefully your patient will look a bit nicer than that):

Navicert works with any Windows compatible camera or input device. You can select your input device from the drop-down. You should instantly see a picture of some sort provided your device is working. If you do not see a picture in this box you will need to consult the manual that came with your web camera for help.

Have your patient pose against a neutral background and click Save Picture when you are ready.

Once you have saved the picture, it will display on the patient's chart. As with any change to the chart the picture will not be saved unless you click the Update or Bill button. If you click EXIT then all changes, including updated photo's, will be lost.

Patient Chart System



The patient chart system is optional. The information is not sent to Sask Health and is only for your own use.

The Patient Chart System is used to keep track of anything from general notes and some exam details. It is backward compatible with Classic CBS. Please note that Navicert contains a much more powerful full featured EMR package which will be discussed later in this manual.

The General Notes control appears at the top right hand side of the Patient screen. To use this box, just click in the General Notes box and type whatever note you like.

Patient Notes

Patient Notes	Referrals	Appointments	Billing History
Date	Туре	Descri	ption
Add N	ote Copy Note		•
This area is for q	uick patient notes. Us	e EMR tab for detaile	ed patient records.
Delete	<u>H</u> istory <u>R</u> ecal	I Inird Party	E <u>x</u> it

In addition to a General Notes box, you can select a number of different note categories from a drop down box at the bottom of the screen.

Note		•
otes. Use	General Notes Problem Summary	rds.
	Progress Notes Present History	
<u>R</u> ecall	Social History Review of Systems	
	Discolar at Discolar	~

Select the category you wish to make an entry for (ie Problem Summary). Once the entry is selected you may click on the Add Remarks button to fill in an entry under the selected heading.

Depending on the entry selected you may see a number of different items to complete. Just fill in the blanks as you wish and hit SAVE.

🛢 Problem S	ummary	×
Patient: Date	ADAMS, WENDY 140144269 Jan 23, 2007	
Doctor	4 EUGENE JACKSON	
General	Headache	
Details	The patient describes mild temporal head ache for the past 24 hours.	
	Save Print Clear Exit	

Patient Notes Continued...

As entries are made the heading will be displayed in the patient notes area. To examine, modify or delete any of the entries just double click on the line you wish to edit. The system will display the note for that date.

Patient Note:	s Referrals	Appointments	Billing History
Date	Туре	Descrip	otion
Jan 23, 2007	Problem Summary	Headache	
Add N	lote Copy Note		•
This area is for q	juick patient notes. U	se EMR tab for detaile	d patient records.
<u>D</u> elete	<u>H</u> istory <u>R</u> eca	II <u>T</u> hird Party Info	E <u>x</u> it

Important Note: When you edit a patient note you will need to click SAVE to place the information onto the Patient Screen. When you click BILL or SAVE on the patient screen the note is recorded in the patient's chart. If you press EXIT on the patient screen the note will **not** be saved.

Once you have completed the new patient form you may click SAVE or BILL. If you click SAVE the patient information will be saved and the system will return to the Enter Patient Name screen. If you click BILL the system will SAVE the patient then move to the patient billing screen. Usually you will click BILL.

Referrals

CBS Navicert includes a powerful utility to keep track of referrals to specialists. To access this feature, click the Referrals tab:

Any pending referrals will be listed in this box. You can quickly use this feature to set up a referral. First, contact the specialist in question and book the referral date. Next, click the ADD button at the bottom of the Referrals tab.



Referrals Continued...

			Double Click to Select	
Date Booked	Jan 23, 2007			_
loctor				_
Name	Dr. CHRISTOPHER E U EKONG	Browse		_
Address	122, MEDICAL OFFICE WING, RGH			
City/Prov	REGINA	Doctor		_
Postal Code	\$4P 0w5	C Lob C Other		_
Phone	[306] 781-7229 Fex [306] 352-0499			
Apt. Date:	Jan 23, 2008			
Гуре	NEUROLOGICAL SURGERY			_
Patient Instructions				
instructions	FOR 12 HOURS PRIOR TO APPOINTMENT	Add to		
				_
comment				
	Save This Referral to the Summary List			
0			C Instant Bird	
Save	Elear 📇 Print	Egid	Ote Default P Ote Default P Ote Default P Ote Default P	IN NOT

To add a referral to the list, first you must select Doctor, Lab or Other. You might be sending your patient for some lab work or you might be sending your patient to a specialist physician.

Once that is done, click Browse and select the doctor or lab from the list provided.

Next, fill in the Apt. Date.

You can fill in any pertinent instructions for your patient. For example, instructions not to eat before a blood test.

If you think you may need to use these same instructions again for another patient you can click Add to List and Navicert will save the instructions in the list to the right. The next time you use this feature you will see the previously saved instructions on the right hand side of the screen – just double click and Navicert will copy those instructions to the Instructions box.

Once your referral information is complete you can click the Print button to print out the referral slip as a reminder for the patient:

leferral		
	Happy Medical Clinic Date Printed: Jan 23, 2007 123 Test Street Inues 947 124 Phone: (306) 555-1212 Fax (306) 555-2121	
- Patient	nt Date: Jan 23, 2000	_
Name	ADAMS, WENDY	
PHN	140144269 DOB 1/1/1963	
Doctor		Ξ́
Name	Dr. CHRISTOPHER E U EKONG	
Address	122, MEDICAL OFFICE WING, RGH	
City/Prov	, REGINA	
Postal Co	ode S4P 0w5	
Phone	(306) 781-7229 Fax (306) 352-0499	
Appointm	NEUROLOGICAL SURGERY	-
Patient Instru	ctions	
Instructio	ns DIAGNOSTIC TEST - DO NOT TAKE ANYTHING BY MOUTH FOR 12 HOURS PRIOR TO APPOINTMENT	
	Bint Egt	

Appointments Tab:

Patient Notes	Re	ferrals	Appointments Billing His	tory
Date	Time	Dr.	Comment	~
Jan 29, 2007	10:10 AM	4	REVIEW	
Jan 23, 2007	08:30 AM	4	REVIEW CARDIAC FUNCTION	
Jan 22, 2007	08:50 AM	4		
Jan 22, 2007	08:50 AM	4		

Clicking on the Appointments tab will show all past and future appointments for the selected patient.

Billing History Tab:

Patient Notes		Referr	als	Appointm	ients	Billing	g History
Date	Code	Dr.	Claim #	Billed	Paid	H EX	Run
Jan 23, 2007	005B	1	×	\$26.40			
Jan 23, 2007	012V	1	×	\$10.20			
Jan 23, 2007	018V	1	×	\$4.30			
Jan 23, 2007	052T	1	×	\$15.00			
			Deta	ails			

From the detailed view screen you can print a statement for the patient. Just select the Start and End date for the statement. Check the desired options under "Print Claim Selection" then click View Statement. The system will bring up the patient statement and allow you to print it.

Clicking the Billing History tab will allow you to instantly review previous and pending services which have been billed on this patient.

To view the services in more detail just click the Details button and the system will display a more detailed view.



Additional Patient Information Buttons:

<u>Bill Label Edit New Save Delete History Recall Party Info Prev. Pt.</u>	<u>B</u> ill	<u>L</u> abel	<u>E</u> dit	<u>N</u> ew	<u>S</u> ave	<u>D</u> elete	<u>H</u> istory	<u>R</u> ecall	<u>T</u> hird Party Info	Next Pt. Prev. Pt.	E <u>x</u> it
--	--------------	---------------	--------------	-------------	--------------	----------------	-----------------	----------------	-----------------------------	-----------------------	---------------

Along the bottom of the patient information screen you will see a number of buttons. Their function is as follows:

Bill	Saves the patient information then moves on to the billing screen. To be discussed shortly.
Label	Brings up the patient Label function. Note that before this function works you must contact CBS Technical Support and have a Label Template designed.
Edit	Places the cursor in the Last Name field and allows you to make changes to the chart.
New	Clears the existing patient and allows you to enter a new patient.
Update	Saves the patient information
Delete	Deletes the displayed patient.
History	Displays detailed billing history as described above
Recall	Activates the Patient Recall function to be discussed shortly.
Third Party	This button allows you to edit the WCB or SGI claim details on this patient.
Next/Prev Pt	These buttons let you move to the next or previous patient in the database.

Recall Function



This function allows you to place the patient into the Recall system. You can enter a Recall Code and a date to be recalled. Please be consistent with your Recall codes or they will be much less useful later when you bring up the patient recall list.

For more details on the Recall system consult the section towards the end of the billing portion of the manual under Utilities.

The Medical Billing Screen

Note: The Chiropractic Billing Screen has a slightly different appearance and is discussed in the section on chiropractic billing.

At first glance the billing screen may seem a bit complex however you will quickly become very proficient in it's use.

The patient name and health number appear at the top of the screen. You may not change them on this screen.

The next item on the screen is the Referring Doctor line. Specialists will need to supply a referring doctor in order to receive full payment for services. General practitioner's will only need to supply a referring doctor when they are performing a consultation (9B), interpreting an X-Ray or Ultrasound for another doctor, when billing for a surgical assist, or in other rare cases.

B Dhysician Billing	Form									
Physician Billing Patient Information Last Billing: Patient Name: Ref. Doctor: Doctor: Diagnosis: Location Visit Date:	Jan 23, 2007 ADAMS, WE 1 CARDIAC - A 1 Jan 23, 2007	NDY DR. V. RI RRHYTHM 1) Office	Next Vis NINSLAND	sit: Jan 2 1401	29. 2007 44269 44269 4427 427 •	Prin Prin V Age Clai	rd Party- © Enab © Disab at Options to Options to Options to Select Pr select Pr select Pr select Pr to B	led oled int (No Preview) inter Each Time Medical Care I Clair	Change In Doctor C Temporary Permanent Ask Each Time nsurance Branch n Date: rd Party Info	
	c ·	C 1	в.		c · Di				A	
Label Listory Lear Listory Listo					Jen 23, 2007 Jen 23, 2007					
Fee C Descri <u>R</u> ema (80 Char Maxim	rks	Code S	earch: DPROFILE	(INCLUE	DES HB, WBC, SM	EAR	AND D	Total:	\$36.60 L) (NOT TO	

Referring Doctor:

owse Referring	Doctors			
JABS, CORRINE	FI	2069	REGINA	(306) 586-3120
JACHAK, SHREE	DHAR R	7017	REGINA	(306) 757-4114
JACKSON, EUGE	NE	6355	MOOSE JAW	
JACOBS, TERRY	'R	4331	LA RONGE	(306) 425-3582
JACOBSON, ROO	ER SAMUEL	7032	CARONPORT	(306) 756-2262
JAHNKE, THEOD	ORE H J	7025	SASKATOON	(306) 382-5854
JAMES, MARK L	ISUE	7045	SASKATUUN	(306) 956-3637
JAMES, MICHELI	.t	2024		(200) 652 2405
Last Name	JACHAK			
Lastinallie	INCELIOD.			
First Name	SHREEDHAR R			1214
First Name Address 1	SHREEDHAR R BROADWAY MEDICA	AL CLINIC		
First Name Address 1 Address 2	SHREEDHAR R BROADWAY MEDICA 1319 BROADWAY AV	AL CLINIC VE		Add
First Name Address 1 Address 2 City	SHREEDHAR R BROADWAY MEDIC 1319 BROADWAY AV REGINA	AL CLINIC VE	Prov SK	
First Name Address 1 Address 2 City Postal Code	SHREEDHAR R BROADWAY MEDIC 1319 BROADWAY A' REGINA S4P 1E5 Bi	AL CLINIC VE Iling Number	Prov SK : 7017	Add <u>Save</u>
First Name Address 1 Address 2 City Postal Code Specialty	SHREEDHAR R BROADWAY MEDIC 1319 BROADWAY A' REGINA S4P 1E5 Bil GENERAL PRACTICI	AL CLINIC VE Iling Number E	Prov SK : 7017	Add Save
First Name Address 1 Address 2 City Postal Code Specialty Phone	SHREEDHAR R BROADWAY MEDIC 1319 BROADWAY AN REGINA S4P 1E5 Bi GENERAL PRACTICI (306) 757-4114	AL CLINIC VE lling Number E Fax (30	Prov SK 7017 16) 565-2237	<u>A</u> dd <u>S</u> ave Delete
First Name Address 1 City Postal Code Specialty Phone E-Mail	SHREEDHAR R BROADWAY MEDIC 1319 BROADWAY AV REGINA S4P 1E5 Bi GENERAL PRACTICI (306) 757-4114	AL CLINIC VE lling Number E Fax (30	Prov SK : 7017 66) 565-2297	<u>A</u> dd <u>S</u> ave <u>D</u> elete

To enter a referring doctor you may enter either the doctor's 4 digit Medicare billing number or the doctor's name. Make sure to enter the last name first. It is usually not necessary to enter a first name. A list of all matching doctors will be displayed. Highlight the doctor you want and press <ENTER>.

If you wish to add a referring doctor just click the ADD button then fill in the blanks and click SAVE.

If you wish to update a doctor's address, phone number, etc just click on the appropriate field, make the change then click SAVE.

Treating Doctor

The next item you must supply when billing a patient is the Doctor in your clinic who provided the service. Navicert provides a quick way of selecting the treating doctor. Each doctor in your clinic will be assigned a number (1, 2, 3, etc.). Just enter that number or click the drop down box to pick the doctor by name.

ICD Codes

D Code Browse	
Diagnosis	ICD
CARDIAC - ARRHYTHMIA	427
CARDIAC - DECOMPENSATION	429
CARDIAC - INFARCTION	410
CARDIAC - ISCHEMIA	414
CARDIAC - NEUROSIS	306
CARDIAC ARRYTHMIA	427
CARDIOMEGALY	429
CARDIOMYOPATHY	425
CARDIO-PULMONARY ARREST	427
Diagnosis CARDIAC - ARRHYTHMIA	
ICD Code 427	CIL
Add	

The next item is the Diagnosis. You must provide the 3 digit ICD code to MSP in order to receive payment. You may type in the code if you know it or you may enter the description of the diagnosis. The system will search the ICD code database and display all matches. Select the best match from the list.

To add a new code just click the ADD button, fill in the blanks then click SAVE. Note that it is perfectly fine, even preferable, to have the same code entered into the system under a number of different descriptions. This makes finding the code much easier. For example you may wish to enter code 401 under both Hypertension and High Blood Pressure. This way, whichever description you enter the system

will be able to locate code 401. It is the numeric code that MSP requires. Once you have added the code just click SAVE to save the code in the ICD code database.

Location Code and Premiums

The location code has a dual purpose. MSP, for unknown reasons, decided to use the location code to indicate where a service takes place and also uses this code to indicate when a premium payment is due.

During normal office hours a doctor uses one of five numbers to indicate the location where the service was delivered.

A doctor may bill a premium for any service delivered which was delivered outside his office and also was provided outside normal office hours. For more details on the rules governing Premium services please consult the MSP fee schedule manual. To indicate a premium service the doctor uses a letter code.

To see a list of available location codes just click the Location button on the billing screen.

Normal Office Hours	5PM - Midnight, Weekend, Stat Holiday	Midnight to 7AM
 1) Office 	🔿 B) 25% Premium In Patient	🔿 K) 50% Premium In Patient
🔘 2) In Patient	🔘 C) 25% Premium Out Patient	M) 50% Premium Out Patient
🔘 3) Out Patient	🔿 D) 25% Premium Home	P) 50% Premium Home
🔘 4) Home	C E) 25% Premium Other	🕥 T) 50% Premium Other
🔘 5) Other		

The system will watch the date of service and prompt the user to select a premium code on weekends but since the time of service is not provided, Navicert has no way to know when to suggest a premium code for after hours services during the week. It is up to the user to make sure the right code is selected.

Note that although you may select a 25% or 50% premium code the fee displayed on the screen remains the same. MSP will notice the premium code and issue extra payment.

Visit Date

Next you will need to enter the visit date. All dates in Navicert are entered in the format Month, Day, Year. You may enter either the number of the month (1), the written form of the month (January) or the short form of the month (Jan). Next enter the day of the month the service was provided on. Finally comes the year. If you leave off the year, Navicert will default to the current year.

When you enter a visit date, Navicert will set that date as the last date used. The next patient you enter will display this visit date. This is very convenient when you wish to enter a number of patients one after the other all seen on the same day. You may change this date by typing over the date.

Paying Agent

The paying agent field will only be displayed if "Enable 3rd Party Billing" is selected on this screen. For this example we will use MCIB (MSP) however Navicert is capable of generating an invoice which may be sent to any 3rd party agent. See the 3rd party billing information after this section.

Service Code

Next we enter the service code. Navicert has a full list of the thousands of MSP codes and fees. Please consult your fee schedule to determine the right code to use for your situation.

You may type in the code and press <ENTER>. For example you may enter a 5B (routine office visit). Once you press <ENTER> the remainder of the line is filled in including the fee.

Instead of pressing <ENTER> you may press the <TAB> key to move across the fields and make changes as necessary.

Navicert has the ability to assist you in finding the right code. Just click in the Fee Code Search box and type in a word to search for. Navicert will search the Fee Schedule and locate as many matches as possible. Please be aware that while every attempt has been made to insure the accuracy of our Fee Code list, we take no responsibility for errors or omissions. Always consult the official MSP Fee Schedule guide for official rates and codes.

Clear					
Save					
E <u>x</u> it			_		
	Fee Code Search: CATHE	TER	Total:	\$84.20	

After you enter your key word, Navicert will display a list for you to pick from:

Fee Code Continued...



You can further refine your search by including more terms. Each word you type must be found in the description of the fee code in order for a code to be displayed.

When you see your code just double click on it to select it.

Remember – read and always refer to the official printed MSP fee schedule guide. Use the Navicert guide only as a memory aid to assist you in locating codes.

75% and 50% Rule

Some services when billed together invoke MSP's 75% rule. Navicert is programmed to catch these situations and will cause the percent box to be filled in when necessary. You may manually select 75% by clicking the drop down box in the percent column. In certain rare cases the 75% rule may not apply to a given situation even though Navicert has selected that rule. Please contact us if this occurs but use the drop down box to clear the 75%.

There are only a very small number of services which are to be billed at 50% (usually orthopedic codes). If you wish to bill a code at 50% just click the drop down box and select 50% from the list.

Multiple services provided on different days may be entered on the same form. Use the TAB key to move across the form and adjust the date.

Using the TAB key you can also move across the form to select the location or even the billing MODE. (Normally you will NEVER change the mode – if you are in doubt please call the support office.)

In rare cases where it is necessary to adjust the fee you will need to click in the fee box with your mouse.

Remarks

The REMARKS field is used to send a message to MSP. You may type up to 78 characters in this box. MSP staff will be able to read this comment and act upon it as necessary. Remarks are often used to provide information MSP requests such as the time a procedure was completed or to indicate that a bilateral procedure was billed, etc.

Third Party Billing

As previously discussed, Navicert is able to bill 3rd party agents. You will only see this field if you have selected the ENABLED option under Third Party on this screen. Some offices bill a lot of 3rd party claims and have the option enabled while others rarely bill 3rd party claims and have this option disabled for faster billing.

To bill a 3rd party agent, once the option has been enabled, select the 3rd Party Agent field with your mouse. Agents that are already entered into the system are MSP, WCB and 0001 (Cash). To see list of agents put your cursor in the Agent field and type a ? then press <ENTER>. A list of all available agents will be displayed.

Select Third Party Agent	
Agent De	scription Agent
OTHER PAYER	OPAY
PAYMENT METHOD NOT SPECIFIED	PAID
ROYAL CANADIAN MOUNTED POLICE	RCMP
SASKATCHEWAN GOVERNMENT INSURAN	ICE SGI
SGL& SULIAL SERVICES	561+
SUCIAL SERVICES	55
VISA CREDITI CARD	VISA
WURKERS COMPENSATION	WLB
Agent Code: WCB (4 Digits/Lette	18]
Agent Name Workers Compensation	and a second second
Agent Address	
Agent City/Prov	
Agent Postal Code	
Misc Note:	
Add 2000 20	Egit

Some 3rd Party Agents require additional information. For example, WCB or SGI claims require information about the injury date, etc. When it is necessary Navicert will prompt you for this information.

If the agent you wish to bill for has not been entered you may enter the information into the system. Just click the ADD button and fill in the blanks. The Agent code or number must be a 4 digit number selected by the user.

When billing for a 3rd party agent you may use standard MSP billing codes and fees or you may enter your own fee code items (See Utility Menu – Edit Data Files).

Third Party Information						
	ADAMS, WENDY - WCB Information					
Date of Injury	Jan 01, 2007					
Area of Injury	LOW BACK					
Claim Number	12345					
Employer Name	HAPPY SHOPPING CENTRE					
Employer Address	123 12TH AVE E.					
Employer City	REGINA, SK.					
Employer Postal	S4V 2J9					
Save	Delete Clear Exit					

Agent	
WCB Workers Compensation	
Claim # 12345 Claim Date: Jan 01, 2007	
Update Third Party Info	

You can view or edit Third Party Claim information by clicking the Update Third Party Info button on this screen.

Printing Invoices

CBS Receip	t							
Happy Medical Clinic 123 Test Street Ituna S4T 1A9 Phone: (306) 555-1212 Fax:(306) 555-2121 Official WCB Invoice					Patie ADAMS 215 HA REGIN/ S4R 1S Date F	ent: 3, WENDY LLIFAX ST A, SK 19 Printed: Jar	n 23, 2007	
Send Form To: Employ Workers Compensation Board HAPPY SHI Claims Department 220 - 1881 Scarth St. Regina, Sk. S4P 4L1 S4V 2J9				nformation: IG CENTRE	(Ir C A D	Claim Deta njury Date: J Ilaim # 1 rea: L IOB: J	ails: an 01, 2007 2345 OW BACK an 01, 1963	
Date Jan 23, 2007 Jan 23, 2007 Jan 23, 2007 Jan 23, 2007	Service 0058 012V 134A 606X	Des Medical Service or Re Medical Service or R Medical Service or Re Medical Service or Re	Description Dr. 2e or Report DR. V. RININSL2 2e or Report DR. V. RININSL2		r	Reg. # 8637 8637 8637 8637	Billed \$26.40 \$10.20 \$47.60 \$72.00	Paid
			T	otal Billed: Total Paid: Total Paid:		\$156.20 \$0.00 \$156.20		<u>Print</u> E <u>x</u> it

After entering the service code and saving the service you will be given the option to print an invoice immediately or print it at a later time.

When you elect to print the invoice later, it will be printed the next time you prepare a submission to MSP. If you decide to print the invoice it will print right away.

Note: You are responsible for sending the invoice to the 3rd party in question. Navicert can not send WCB or SGI claims electronically – that's why Navicert prints the invoice – so you can mail it.

Quick Keys

Take a moment to set up your Quick Keys – covered later in this manual under the Utilities section. You can program your quick keys to help you quickly enter common service codes and diagnostic codes with the tape of a button.

Quick Calculator

The quick calculator function allows Navicert to assist in the entry of certain service codes – mostly for Anesthesiology. Check the Quick Calc box to enable this feature. After you enable this feature, Navicert will watch the first service you enter. If you enter, for example, a 500H Navicert will pop up a form requesting additional information. Just fill in the start and end times of the operation and Navicert will calculate the 501H codes.

Chiropractic Billing

Patient Information Patient Information Patient Name: Doctor: Diagnosis: Visit Date: Last Billing: Jan 23.	Imp, Form [ADAMS, WENDY [T [DR. I. M. HAPP [ABDOMINAL PAIN OR SWEL Jan 23, 2007 2007 Next App	Y Y UING NOT OTHERWI Update Third Pa pointment: Jan 29, 2007	_▼ arty Info	Receipt Printing C Enabled Disabled Instant Print (No Preview) Select Printer Each Time Copayment Method / Agent Print Invoices Immediade Print Invoices Immediade Payment Method	Change In Doctor Change In Do
Label Label Listory Clear Save Egit	Service Code	Service Date	Age	nt Copay	Fee
(80 C M	Characters aximum)			i otai:	

Chiropractic billing is very similar to medical billing however there are a few important differences.

Service codes are the standard Chiropractic codes (1U, 5U, 53U, etc). The diagnostic codes are "C" codes (ie C14, C15, etc.) The Visit Date is entered in the usual Month/Day/Year format. The Paying Agents are alphabetic rather than numeric. If you are unsure of the agent to use, type a question mark and press <ENTER> to see the full list.

Select Third Par	ty Agent						
	Agent Description	Agent					
AMERICAN EX	AMERICAN EXPRESS						
CASH PAYMEN	CASH PAYMENT						
CHEQUE - EDI	ſ	CHEQ					
CREDIT CARD	• OTHER	COTR					
DEBIT CARD P	AYMENT	DC					
DEPARTMENT	OF INDIAN AFFAIRS	DIA					
DEFERRED PA	YMENT	DPAY					
DEPARTMENT	OF VETERAN AFFAIRS	DVA					
MASTERCARD	PAYMENT	MC					
Agent Code:	COTR (4 Digits/Letters)						
Agent Name	Credit Card - Other	-					
Agent Address	0						
Agent City/Prov	900 900	our s					
Agent Postal Code		bring (
Misc Note:							
Add	Garco Garcol Exit						

Navicert will automatically apply the right fee schedule for the agent selected. For example, selecting SS uses the Social Services fee schedule and WCB will select the Workers Compensation fee schedule.

Chiropractic DPAY & 99U Code:

Usually when a patient presents to the Chiropractic office he will be paying for his service at the time of his visit and the agent selected would be CASH or CHEQ, etc. On occasion a patient will request the ability to pay at a later date. A deferred payment is entered into Navicert by using the DPAY paying agent. Navicert will record the service exactly like any other service however the patient's account will be debited for the amount of the copayment.

When the patient pays for his service you must enter the payment into Navicert to credit the patient's account. This is done by billing a 99U service code. Just type 99U on the service line and Navicert will ask the amount of the payment and method of payment. Type in the amount and Navicert will credit the patient's account with that amount.

Note that you may enter a credit (99U) code at any time. It does not have to be made in conjunction with a service. In some cases a payment may be made prior to a visit resulting in a credit balance on the patient's account.

Just remember, the DPAY agent used with a 5U service code is for Deferred Payment (Debit). A 99U service code is for payment (Credit).

Hospital In-Patient Services

For Physicians, billing for hospital days is simple with Navicert. Either select an existing patient or enter a new patient as previously described. Move to the billing screen and enter the referring doctor, treating doctor, location code and date as previously discussed. Make sure to use the first date of hospital in-patient days as the Date.

For the service code just enter the hospital in-patient days code for your specialty. General practitioners, for example, use 25B.

Once you press <ENTER> you will be asked to confirm the first date in hospital and to enter the last date of service. This done you will see the hospital days form displayed.

If necessary you may adjust the items on this screen. The first 10 days of in-patient are billed as 25B. If the doctor was not caring for the patient for the full 10 days of 25B, you can use your mouse to click on a date. Navicert will then remove that date from the days being billed.

Pressing the NEXT button will cause Navicert to move to 26B, 27B and finally 28B for all remaining days.

			A	AMS, WENDY	140144269			
anuary 2001	6	1						
Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Service:	025B
1	2	3	4	5	6	7	Agent:	MCIB
8	9	10	11	12	13	14	Start Date:	, Jan 01, 2006
15	16	17	18	19	20	21	End Date:	Jan 10, 2006
22	23	24	25	26	27	28	Days Billed:	10
29	30	31					Total:	\$220
							Remarks:	
ebruary 200	J6 	Tuesday	Wedneedeu					
Sunday	Monday	ruesuay	weunesuay	Thursday	Friday	Saturday		
Sunday	Monday	Tuesuay	1	Thursday 2	Friday 3	Saturday 4		
Sunday 5	Monday 6	7	1 8	2 9	Friday 3 10	Saturday 4 11		
Sunday 5 12	6 13	7 14	1 8 15	2 9 16	Friday 3 10 17	Saturday 4 11 18		
5 12 19	6 13 20	7 7 14 21	1 8 15 22	Participation 2 9 16 23	Friday 3 10 17 24	Saturday 4 11 18 25		
5 12 19 26	Monday 6 13 20 27	7 7 14 21 28	1 8 15 22	P 2 9 16 23	Friday 3 10 17 24	Saturday 4 11 18 25		

Sometimes a physician will share responsibility for a patient during a 10 day period. Take the example of a patient who was seen by Doctor 1 and Doctor 2. Doctor 1 saw the patient from Monday through Friday and Doctor 2 took over for Saturday and Sunday then turned care of the patient back over to Doctor 1. When Doctor 1 bills the patient he must make sure not to bill Saturday or Sunday or Doctor 2 won't be able to bill the services. Doctor 1 would just click on Saturday and Sunday to unhighlight them. The system will then not submit claims for those days. Doctor 2 could then submit his claims for Saturday and Sunday.

Out of Province Billing

Physicians are able to bill for patients from most other provinces and territories directly. The only exception at this time is the province of Quebec. You will need to bill Quebec patients directly, issue them a receipt and allow them to be reimbursed when they return home.

To bill for an out of province patient you only need to know the billing number for the patient's provincial health plan and province of origin. Just enter the patient as you would any other patient. The only difference is in the PHN. Enter the two letter province code from the list below and follow it directly with the EXACT number on the patient's health card. If the health card shows letters in the health number those letters must be included. Do NOT enter spaces or dashes in the health number.

BC	British Columbia	AB	Alberta
MB	Manitoba	NB	New Brunswick
ON	Ontario	NS	Nova Scotia
PE	Prince Edward Island	NF	Newfoundland
ΥT	Yukon Territories	NT	North West Territories
NU	Nunavut	XX	No Coverage (can't bill to MSP)

List/Edit Services

Once you select List/Edit Services from the Patient File menu you will see:

List Services - Double Click #	any Patient to Ed	lit Services			
Printing Patient:		Search:			
Doctor:		-			
Date Order	Start Date	Time	<u>Options</u>	A Tod	ll Postings ays Postings
Alphabetical Order of Entry Date of Service	Print Report		 Instant Print Preview First 	To	days Visits E <u>x</u> it
	Double (Click Service to Edit			
Name	DATE	CODE	S	AGENT	TOTAL
ADAMS, WENDY	Jan 23, 2007	005B 012V 01	8V 052T	MCIB	\$55.90
ADAMS, WENDY	Jan 23, 2007	005B 012V 13	4A 606X	WCB	\$156.20
ADAMS, WENDY	Jan 01, 2006	025B		MCIB	\$220.00
ADAMS, WENDY	Jan 11, 2006	026B		MCIB	\$176.00

Note: This is a bit different from CBS Classic. In CBS Classic there were two separate menu items. One to list and one to edit services. Both functions have been combined into one function with Navicert

Although this screen may appear a bit complex at first glance it's really fairly easy to use. In most cases you will want to print a list of all services entered so far during the day. To do that, just click the Today's Postings button.

You may wish to list all services entered since the last submission to MSP. To do this, just click the All Postings button.

There are a number of options on this screen you may wish to use. The Date Order option is very useful. You may wish to list services ENTERED on a certain date – use Post Date. You may wish to list services PROVIDED on a certain date – use Visit Date.

You may select either Alphabetical or Order of Entry or Date of Service in the Report order box.

Once all options have been selected just click the Print Report button.

Editing Services:

To edit a service and correct an error you must first locate it on the List Services screen. In the Search box (top right) type in the last name of the patient. Once you see the patient, double click on that patient and the billing information will appear on the screen. From there you may make any necessary changes to the services.

Note: You can not edit Hospital services. You must delete them then re-enter them.

MSP

Every few years MSP changes names so this title may be confusing. First we had MCIC then MCIB then MSP and I believe we are now on MSB. Parts of the program may refer to MCIB and other parts may refer to MSP. Both of these terms refers to Medicare services in Saskatchewan. Whatever the government calls themselves at the time you read this manual, this menu item refers to sending and receiving billings back from the government. The MSP menu will allow the Navicert user to prepare and send claims to Sask Health, pick up and print out return files from MSP and examine patient history information.

CBS National Control (National Control Control (Control (Contro) (Control (Contro) (Contro) (Contro) (Contro	vice	rt EMR v1.4 Site	e #367	TERM9	Now	Display	ing: Pl	CS\TEDD	YR04.	IPG	
Patient Eile	MSP	Third Party Mise	. Help	Exit							
		Prepare Billings			Appointments				Electronic Medical Recor		
Ent Servi		Iransrer Read Returns	Ŷ	Prepare Billings	P	Send or Pickup	\$	Read Returns	Q	Examine History	Find Claim by Number

Prepare Billings

🖣 Prepare Billings 📃 🗖 🔀								
cat Aller	Doctor: Patient: Status:							
 Report by Paying Agent Report by Location 	Prepare Billings							

As of this writing, MSP processes the files every other Tuesday. They require the submission to be received by 9am Tuesday morning. Late submissions are processed with the next run two weeks later. Although we know some die-hard last minute customers will ignore this suggestion, give yourself a bit of extra time in case there is a problem. We usually suggest making the submission on the Thursday or Friday of the week prior to processing. If you are unsure as to the next submission date please contact our office for assistance.

To make your submission, click on MSP then click on Prepare Billings.

Navicert will ask you to confirm that your printer is ready. Click OK when the printer is ready.

Navicert will then print out all MSP services.

3rd Party Claims Printing

If there are unprinted 3rd party services you will see the third party printing menu. Navicert will ask how many copies of the 3rd party invoices you wish to print. Often offices will wish to print 2 copies – one to mail and one to keep.

Please note that while MSP services are sent through the modem or Internet, 3rd party services need to be sent by mail or by fax.



Starting a New Billing Period

Once Navicert has finished printing all services it will confirm that all the services have printed correctly. This is an important question. If you answer YES, Navicert will move all the services into the history area and start a new billing period. You will no longer be able to easily correct or re-print the services once they are in the history area.



If you notice a problem with your print-out, such as a paper jam, you should make sure to click on NO. You will then be able to fix any problems with your printer and prepare the services again.

Transfer Billings to MSP

After you have started a new billing period, Navicert will bring up the Transfer screen. From this screen you will be able to send your MSP billings through the modem, by Internet or place them on a computer diskette.



Submission Methods:

At the time of writing there are three supported methods of billing submission. You may submit your claims by internet, by using MSP's PC-Anywhere software or on diskette. While MSP no longer allows new clinics to select diskette billing there are some grandfathered clinics which use this method. In addition there may be cases where your modem or internet may not be working and you will need to select this method. Make sure to contact our office before you change your submission method.

Whatever submission method you are presently using, make sure it is selected from the list of displayed options. Once selected, click on START TRANSFER. Navicert will then close all databases and suspend all functions until the submission is complete.

Internet

When you have this option selected, Navicert will place a copy of your submission file in the AW folder in the root of the drive where your Navicert program is located. Your submission file is called CLAIMSIN. For Windows XP, your submission file is usually located in C:\AW. For Windows Vista your file is located in C:\USERS\PUBLIC\AW

In the case of a network system, your Navicert program may be loaded on a different computer than the one you use. In cases like this, the server drive is referred to by a drive letter such as F: and so your submission file will be in F:\AW or \\SERVER\AW

You will need to know where your submission file is stored before you begin. Navicert displays this information on the Transfer screen.

When you click your Start Transfer button, Navicert will bring up Internet Explorer and set it to the MSP submission page. From this point forward you are on your own – Navicert can not tell what you are doing or offer help. If you fail to select the right file for submission or encounter an error, Navicert will have no idea that a problem occurred and can not warn you of the problem.

When you first go to the Sask Health web site, you will be asked to click on your certificate. This pop-up box will list your name or clinic name. You probably only have one certificate but in rare cases you may have certificates for other web sites. Click on the certificate issued by Sask Health – it usually lists your clinic name or doctor's name. Once selected, click Continue. This process identifies your computer to Sask Health and logs you into the Sask Health system. You will see "I agree – Log me on". You are agreeing to the information displayed – basically agreeing to use the system in a legal manner according to Sask Health regulations. You must click "I agree" to gain entry to the site.


Once you are logged in, you will see: (Note: The MSP web page appearance will likely change from time to time however the basic functions will remain the same) The second secon

Click the Submit Claims button and you will see the next page.

The Submit Claims screen is displayed below.

🚰 ICS - Submit Claims - Microsoft Internet Esplorer	18 X
File EJK Yew Fervilles Turb Help	A
😮 text + 🕥 - 🛋 😰 🐔 🔎 Search 👷 Favorites 🔗 🔗 - 😓 🔤 + 🥅 🖏	
Address 1 http://heathd05/peeula/or-dev/UpisadClains.aspx	💌 💽 60 Links **
Saskatchewan HFAITH	
ICS Home	
Select Claims File to Upload	
Drowse	
Submit Claims	
granter granter	
	×

You will see a line that asks you for the submission file name. You can type in C:\AW\CLAIMSIN or C:\USERS\PUBLIC\AW

(When working on a network, make sure to change the C: to an F: or whatever your server drive letter is).

Make sure to get your backslash key \ usually located above your enter key rather than the forward slash / which is located under the question mark. Also make sure to use the full colon : rather than the semi-colon;

If you type it in properly it will look like this: C:\AW\CLAIMSIN

If you would rather, you can also click the Browse button and search your hard drive for your CLAIMSIN file. Make sure you locate the file in your AW folder. When you click Browse you will see a box pop up on your screen that allows you to navigate your hard drive to select your AW folder and your Claimsin file.

One advantage of using the Browse button is that Windows will remember the last place you browsed. If you don't often browse on your computer, your system will likely still be pointing to your C:\AW folder. This can save you some time. Naturally if you select the wrong file or can't find your AW folder MSP won't get the submission and won't pay the claims.



To get to your AW folder and Claimsin file using Windows XP or Vista follow these steps:

- Click Browse on the Sask Health web page
- Click on My Computer (left hand panel of the screen)
- Double Click on Local Disc C (it may have another name but it will always have C: in the name)
- Double Click the AW folder. When it opens you should see something like the picture above. Note that at the top of the screen there is a small box that says Look In: AW when you have selected the AW folder.
- Double Click the file named CLAIMSIN

After selecting your Claimsin file from your AW folder you will see something like this:

ILS - Submit Llaims - Microsoft Internet Explorer		_1@1×
Ele Edit Yew Favorites Iools Help		
🔾 back + 🕥 - 🖹 😰 🐔 🔎 Search 👷 Pavorites 🚱 🎰 😓 🐻 -	🔜 🚜	
Addross 📳 http://healthd05/jsesula/ics-dev/UploadClaiws.aspx		💌 🛃 Co Linis »
ICS Home	Submission	
Select Claims File to Upload		
C:\AW\CLAIMSIN	Drowse	
Submit Claims		

Once you have your submission file selected, click the Submit Claims button below the submission file name.

Once the Sask Health web site will now take the claim file that you have sent and begin processing. You will see this screen:



The notice says to be patient but in practice the processing is usually complete in just a few seconds. There have been cases where the process fails or "hangs" down at Sask Health and this screen remains up for a long period of time. If your submission takes more than a few minutes, it has probably failed. In this case, call Navicert for assistance.

Claims Valdeda Decembra Universed Valdeda Update Porter 2000 Port

Validation Report:

Provided all goes well you will see a validation report. Make sure to print the validation report and carefully compare the results with your Navicert report. Make sure the totals match and all doctors are listed. If there is a discrepancy you may have submitted the wrong file. Please call for assistance if this is the case.

You will notice in our example above there is a list of Rejected claims. If you see any rejected claims you must deal with it immediately. Don't wait for 2 weeks only to discover you will not receive a payment! Call us as soon as you notice the error.

Notice that there is a Pickup button on this screen. MSP takes a week to process your file so don't be fooled into thinking you can pick up your return file right away.

Once you have printed your validation report, close Internet Explorer. You will see the Navicert transfer screen. Just click EXIT.

After a successful submission you will notice 3 things.

- You will have a print-out for each doctor listing the totals and with a place to sign. Make sure the doctor signs the form it's part of his MSP agreement.
- You will have a validation report printed that matches the signed print-out.
- When you return to your main Navicert menu you will note the pending services box is back to zero for each doctor indicating the claims have been moved to the history area.

If you are missing any of these three items, please call for assistance.

	_	
/les	sages	
	- Ponding Co	n licco
	Fending Se	
	1) HD	0
	2) MB	0
	3) AK	0
-	4) EJ	0
2		

• PC-Anywhere

Note: We do NOT recommend the use of PC-Anywhere with Navicert. DOS based applications require specialized hardware. Modems often fail to connect properly. The use of this transfer method will result in frustration and difficulties that are simply unnecessary. If you are using PC-Anywhere it's time to switch to modem submission.

If you are a die hard PC-Anywhere users, here are the instructions for it's use:

MSP supplies a program called PC-Anywhere which is used to dial the telephone modem and submit claims. MSP supplies a detailed instruction manual for use with this software. Where that manual conflicts with this manual, please use the instructions in THIS manual. Call our office if you have any questions regarding the use of Navicert with PC-Anywhere.

Before you begin you should insure that your modem has access to the telephone line and that any other device which shares the line (such as a fax machine) is turned off.

When you select this option you should see the PC-Anywhere screen. Look for the words "Initializing modem" and "last modem response 'OK". These are indications that PC-Anywhere is communicating with your modem properly.



. 0 ×

PC-Anywhere will dial the telephone and connect to MSP. You will then be asked for a password. Enter the password

assigned to your clinic. Navicert does not have this password so if you have lost the password you will need to contact MSP for assistance.

Once your password is entered, PC-Anywhere will hang up the telephone and display "Waiting for call-back" in the upper left hand corner of the screen.

MSP will then call your office. Make sure to let your modem answer this call. If a staff member, answering machine or fax machine answers the call it will prevent the PC-Anywhere software from working properly.

PC-Anywhere will answer the telephone and present you with a menu. Select option 1 (by typing 1) to submit your claims to MSP.

Important: MSP will briefly review the claims you have submitted and send back a short report. This report lists all doctors in your clinic with dollar totals. The report will then print on your printer. If you do not get this report or if the totals on this report do not match the doctors in your clinic your submission was probably not received. Make sure to examine the details of the report. If you see "Doctor ineligible to submit" this indicates the doctors claims were not accepted for processing. Make sure to contact MSP immediately about any rejected doctors. After a successful submission you will notice three things:

- You will have a print-out for each doctor listing the totals and with a place to sign. Make sure the doctor signs the form it's part of his MSP agreement.
- You will have a validation report printed that matches the signed print-out.
- When you return to your main Navicert menu you will not the pending services box is back to zero for each doctor indicating the claims have been moved to the history area.

If you are missing any of these three items, please call for assistance.

Disk Submission:

If you are submitting claims by diskette you will need to have two good quality blank disks handy. Note that Navicert has a Format function available. Click this button if you need to format (erase) your diskettes. Note that diskettes wear out. Make sure to replace your disks on a regular basis.

Once you click on Start Transfer, Navicert will ask you for the MSP disk then a backup disk. Send the MSP disk to MSP for processing. Keep the backup disk incase the MSP disk is lost or damaged in the mail.

After a successful disk submission you will notice three things:

- You will have a print-out for each doctor listing the totals and with a place to sign. Make sure the doctor signs the form it's part of his MSP agreement.
- You will have an MSP and a BACKUP disk. Make sure to send your MSP disk to MSP and keep the backup disk incase something happens to your MSP disk.
- When you return to your main Navicert menu you will not the pending services box is back to zero for each doctor indicating the claims have been moved to the history area.

If you are missing any of these three items, please call for assistance.

Resending PC-Anywhere Modem Billings

Since there are several hundred offices all submitting at roughly the same time it is quite possible that you may occasionally encounter a busy signal or a crashed server and a failed submission. Sometimes modems, like fax machines, fail to communicate with each other. Sometimes a staff member will pick up an extension phone causing the submission to fail. Whatever the reason for the failed submission, the result will be the same: You will usually not receive a validation report after the submission.

If you know that the submission has failed you should send the claims again.

After a submission Navicert will display this box:

CBS for Windows		\times
Are you finished with	the modem tran	sfer?
Yes	<u>N</u> o]

To send the claims in again just click on NO then click on START TRANSFER to try the submission again.

If you have tried a number of times and are constantly getting a busy signal or can't connect with the server you may wish to try the transfer at a later time. In this case, even though you are not really finished with the modem transfer you may click on YES. Navicert will return to the main menu.

When you have time to try your submission again it's a fairly simple process. Navicert keeps your most recent submission on file until you prepare your billing files again. For this reason it is important NOT to click on Prepare Billings again until you have succeeded in sending the previous file. When you are ready to try the modem transfer again click on MSP – Skip over Prepare Billings – and pick "Modem / Disk / Net" then click on Start Transfer to send the files in again. Hopefully it will work this time. Note: Since you are coming in from the main menu rather than going through Prepare Billings, Navicert has no way of knowing that you are trying to make a submission. As a result, trying to be helpful, Navicert will ask if you wish to read a return file when you are finished. Just answer No.

If you are having on-going problems there may be a problem with your modern hardware, telephone line or software set-up. In some cases MSP may have had computer problems. Simply waiting and trying your transfer at a later time will resolve the problem. Navicert does not supply modern hardware or software but we may be able to assist in some cases. Feel free to call for help but please recognize that if the problem is with your equipment or with your service provider we may have to direct you to another party for assistance.

Return File



When a claim is sent to MSP, Navicert keeps a copy in the history area. Navicert tracks these claims until they are returned. Until a claim is returned, it is listed as outstanding. MSP payment listings can be received in electronic format. If you are using disk submissions you will receive the disk in the mail. If you are using modem submissions you must instruct your computer to dial into MSP and pick up the return file.

Before you can read your return file you must pick it up from MSP. To pick up a return file click on MSP then click on Modem/Disk/Net. You will see the Transfer screen displayed. Make sure your transfer method is selected. Click on Start Transfer.

Transfer Files to or From MSP	
MCIB Web Site	tps://ics.health.gov.sk.ca
	Transfer Method Internet PC-Anywhere Drive A: Drive B:
Submission File	aw\claimsin
Return File	\aw\returns.txt
Start Transfer	Egit

• Disk Return Files

If you are using disk submission then your return file will generally be returned to you on disk. In this case you may skip the following and select Read Return File directly from the main menu.

• Internet

If you are using Internet submission you will have to pick up your return file through the internet before you can read it. When you click the Navicert Start Transfer button, Navicert will take you to MSP's site. You will first see a security warning – click OK. Next you must identify yourself to MSP by clicking on your Certificate and finally log in by clicking "I agree".

Once you are logged into MSP's web site you will see a menu with a button marked Pick Up Returns. Click that button to begin downloading your return file.

At this point you will see a pop up box that asks if you want to Open or Save the file. Select SAVE.

The next question is where will you save your file. It is really important you answer this properly. Usually you will place your RETURNS.TXT file in the root directory of your C drive in your AW folder (usually C:\AW for Windows XP or C:\USERS\PUBLIC\AW for Windows Vista).

If you are using a network your AW folder may be on a different drive letter such as F, etc. You MUST KNOW where to put your return file or Navicert won't be able to find it and read it.

 $\mathbf{2}$

Make sure to browse your drive, find your AW folder usually
located in the root of drive C (C:\AW or
C:\USERS\PUBLIC\AW for Windows Vista). You can find
your C drive by clicking on My Computer then select Local
Disk C (it may have another name but it always has C: in the
name somewhere)

Locate the AW folder just below C:. Don't change the return file name – it should be RETURNS and don't change the file type – it should remain Text Document.

Your system will likely ask you if you wish to overwrite the existing file – Click YES to allow the new file to be saved.

Once you have saved your file to your hard drive, **close your Internet Explorer** and click the Exit button on your Navicert Transfer screen. **I know it's tempting but do not click OPEN – close and let Navicert open the file later**. Navicert will notice the new return file and will take you to read your return file. If you don't pick up your return file or if you don't place it in the right place, Navicert won't be able to read it so please be careful to select the right location and avoid changing the return file name. Note that different versions of windows will show a slightly different browse screen.





Look in:	🛅 aw			v	🔰 🔍	× 🖆 [📰 🕶 Too	ļs •	
	Name 🔺						Size	Type	^
	AW.AL1						1 KB	AL1 File	
My Recent	🖬 AW.AP1						4 KB	AP1 File	
Documents	🖬 AW.HI1						6 KB	HI1 File	
	🖬 AW.HW1						6 KB	HW1 File	
	AW.RC1						3 KB	RC1 File	
Desktop	AWR.EXE						331 KB	Application	
	AWR.MSG						212 KB	Outlook Ite	n
	AWREMOT	E.EXE					403 KB	Application	
	BTRIEVE.E	XE					42 KB	Application	
My Documents	🖬 daimsin						2 KB	File	
	MCIBTELE	BAT					1 KB	MS-DOS Ba	t
	🖬 ret1.old		Type: File				131 KB	OLD File	
	🖬 ret2.old		Date Modif	ied: 2/16/2	004 9:15 AM		8 KB	OLD File	
my computer	🖬 returns	returns Size: 1.75 KB						File	~
S	<		ш					>	
My Network	File name:	RETURNS			×	Range		In <u>s</u> ert	•
Places	Files of type:	All Files (*.*)		*		(Cancel	

PC-Anywhere

Once you have selected Start Transfer the PC-Anywhere software will dial MSP. PC-Anywhere will ask for your password. The program will hang up and MSP will call you back. You must make sure to allow the modem to answer the call – don't let staff, answering machines or fax machines answer the call. Once your modem has answered the call you will be presented with a menu. Select 2 to pick up a return file.

On occasion, MSP will transmit a message to your clinic which will be printed by your computer. When there is no message, MSP sends an empty box which will be printed on your printer. Don't be confused by this empty box – it is normal.



Once the transfer has finished, Navicert will ask if you wish to read a return file. Just click on YES.

CBS for Windows		\times
Do you wish to print your	MCIB Return File	Now?
Yes	<u>N</u> o	

Printing The Return File

The return file is created by MSP and lists all services which have been processed in the most recent submission run. Most claims are paid without any difficulty but some claims have error codes. Any claims with error codes must be investigated and resubmitted if necessary.

🖻 Read Return File	
	Return File Name: \AW\RETURNS.TXT
	Returned Doctor:
	Returned Patient:
	Claim Number:
	<u>Bead Returns</u>

The return file name will be displayed at the top of this screen. For PC-Anywhere users it should read \AW\RETURNS. For Internet customers it should read \AW\RETURNS.TXT. For disk users it will read A:GROUP123.RET (or B:GROUP123.RET) where 123 is replaced by your group number. If your return file name isn't right please call Navicert support for assistance.

The Returned Doctor field will display each doctor in turn as Navicert processes returned claims for that doctor.

The Returned Patient and Claim # field will each display information about returned claims one by one as they are processed..

Parts of the Return File

The main body of the report contains only Paid lines. At least that's what MSP calls them. But be careful – a paid line can be paid at a rate other than the amount submitted. In fact a Paid Claim might be "Paid" at zero dollars! Any time a claim is paid at an amount other than the amount submitted there will be a two letter code in the "EXPLAN" column. These Explanatory codes help you to determine the problem with the claims. You will need to use the MSP payment guide to look up the explanatory codes.

Some codes are for information only. They may indicate that you need to update a date of birth or a PHN number. These codes will be paid in full and do not need to be resubmitted but you will want to update the patient's chart for future use.

Some codes indicate the claim has been rejected, perhaps because of an error in the patient information (sex, name, PHN, etc). These claims will be "paid" at zero dollars. You must investigate the claim, check the patient information then re-enter the claim and submit it with the next billing period.

Some claims are paid at zero dollars but should not be resubmitted. One such example would be a BA error code which indicates the claim has already been paid on a previous run. Other codes may indicate that the patient is not covered by Sask Health and will not be paid regardless of the number of times submitted.

Following the body of the report is the total line. This line indicates the total payment to the doctor.

Following the total line comes rejected lines. These lines contained more serious errors and could not be processed by MSP. They must be handled in the same way as claims paid at zero dollars.

Navicert then re-prints all claims with explanatory codes from the body of the report. The rejected lines combined with the summary of explanatory codes forms a concise report of all claims which need to be examined and resubmitted.

Each doctor in the clinic will have a similar report printed.

After all the return files have been printed Navicert will compile a list of claims which have not been returned. That is to say the claims have not been paid and they have not been rejected. They have not been returned at all.

Navicert will print these claims based on the length of time since the claim was first submitted. Claims that are over 60 days old will be printed on a separate report and must be dealt with in a special way.

Any claim that has been outstanding for 60 days or more should be investigated. Often these claims have been paid under another claim number or another PHN causing Navicert to leave the claim unreconciled. For example, you may submit a claim for a new baby under the mother's PHN. MSP may pay the claim under the baby's new PHN. Navicert won't be able to reconcile this claim.

Sometimes it is possible for you to locate these claims based on the claim number and a careful examination of your previous return files. In other cases it is necessary to contact MSP to inquire as to the claim's status.

Once a claim has reached the 60 day outstanding report, Navicert will mark the claim so it will no longer print out on future reports. The patient history will show the claim as unpaid. The run code will be shown as ?? since Navicert has no idea which run code the claim was paid on. If you examine the claim and find that it has been paid there is nothing further that needs to be done. Of course, if you wish, you may edit the history file to mark this claim manually paid. See the section on Manual Reconciliation later in this manual for more information on this topic.

In some rare cases a claim may be submitted to MSP and simply vanish. MSP claims this can not happen but in any system there are bound to be errors. In the case of an unpaid claim that has been outstanding for more than 60 days the claim should be resubmitted.

Exceptional Circumstances

Generally there is little to go wrong with a return file however on occasion there is a problem. You may notice that there are a very large number of outstanding claims on one report. For example the 30 to 45 day report may contain several hundred outstanding claims. Since MSP usually processes claims within 2 weeks you know there is a problem. What could it be?

- 1) MSP didn't get the submission file in the first place and thus the claims were never paid.
- 2) MSP got the submission file but rejected it because a doctor was not eligible to submit.
- 3) MSP got the submission file and processed it but you failed to pick up a return file.

The best way to sort out this kind of mystery is to follow these steps:

- Find the printed submission report that matches the outstanding claims and get the exact date of submission.
- Check through your return files. Each return file has a two letter Run Code. The first Run Code was AA followed by AB, AC, etc. Make sure you have each run code in sequence. If you are missing a return file you will need to contact MSP to see if the return file is still available. The sooner you notice a problem the more likely you will be able to get your return file. MSP only keeps the past two return files.
- If you have all your return files, call MSP and see if they got the submission file in the first place. If they didn't get the file call CBS Support we will help you retrieve the submission and resubmit it.

If you still can't figure out the problem call the CBS office and we can give you further suggestions.

Note: Navicert keeps all submissions. If MSP didn't get a submission you DO NOT have to type it in again. Give us a call and we will help you resubmit the entire submission.

Resubmitting an Individual Claim

To resubmit a claim, just enter the claim as if it were a new claim. Select Patient File and Enter Services then proceed to enter the patient's name or PHN and fill in the blanks in the Services screen. Make sure to use the original date of service when resubmitting the claim. If necessary, fill in the comment area at the bottom of the claim screen with an explanation. This explanation line will be sent to MSP and may help an assessment officer to process the claim.

Third Party



The Third Party menu allows you to deal with claims that are not handled through the electronic submission portion of the program. For example WCB or SGI claims. Because these claims are submitted on paper, there is no way for Navicert to know when the claims are paid. That is unless you reconcile the claims. When you receive payment from a Third Party agent you must reconcile the claims (mark them paid).

To reconcile 3rd party claims click on Third Party then on Reconcile Payments. Identify the patient and bring the billing history up on the screen.

E	i Reconcile Paym	nents												
								. 1 401 44	000					
					ADAM	15, WENI	JT PHN	. 140144	269					
					CTD	• I			- 1 4 142	-1-1				
				Hold the	e «СТRI	.> key dow	n when you	I CIICK TO S	elect multi	pie lines.				_
	Date	Claim	Serv	Units	Location	Billed	Paid	Premium	Total Paid	Explan Code	Doctor	Run Code	Agent	^
	Jan 23, 2007	10907	0058	1	1	\$26.40			\$0.00		1		MCIB	
	Jan 23, 2007	10907	012V	1	1	\$10.20			\$0.00		1		MCIB	_
	Jan 23, 2007	10907	018V	1	1	\$4.30			\$0.00		1		MCIB	_
	Jan 23, 2007	10907	052T	1	1	\$15.00			\$0.00		1		MCIB	_
	Jan 23, 2007	00000	0058	1	1	\$26.40			\$0.00		1		WCB	_
	Jan 23, 2007	00000	012V	1	1	\$10.20			\$0.00		1		WCB	Ξ
	Jan 23, 2007	00000	134A	1	1	\$47.60			\$0.00		1		WCB	
	Jan 23, 2007	00000	606X	1	1	\$72.00			\$0.00		1		WCB	
	Jan 11, 2006	10909	0268	8	2	\$176.00			\$0.00		4		MCIB	
	Jan 01, 2006	10908	0258	10	2	\$220.00			\$0.00		4		MCIB	
														~
	MÅ Se	elect Patient	.	Select Age	ent 🗋 🚵	- Unselec	t All 🛛 🦰	Mark Unp	aid 🚺	Delete Clai	m V	E dit Cla	im	
	R R					<u></u>					X			
		View Full	V/54 C	hange Ag	ent 🚵	Select	All 1	Mark Pa	id 🔼	Add Item		Exit		
	1	ristory				#1	V							

Click on the service you wish to mark. You can select multiple services if you hold the <CTRL> button down while clicking.

Once the claim or claims have been selected click the PAID button and the services will be marked as paid.

In addition you can do the following:

Change Agent

The Change Agent button allows you to change the paying agent for a particular service. First click on the service or services you wish to change. Next click Change Agent then type in the new agent.

Mark Services Unpaid

In the rare event that a patient's cheque bounces or a WCB claim is first paid then later rejected you may wish to take a service, which had previously been marked as paid, and then mark it unpaid. Just highlight the services you wish to work with then click the Unpaid button.

Delete Services

Be very careful with the Delete Services button because once a service is deleted there is no automatic way to undelete it. To delete a service first highlight the service(s) then click the Delete button.

Edit Service

If you wish to make a change to an already billed service you may do so with the Edit Service button. First highlight ONE service then click Edit. You may make any changes you wish then click on the SAVE button. Remember that you are only editing patient history. The service will not be reprinted or resubmitted. If you have made changes to the patient history and wish to send these changes to a third party you must print the claim again.

Add/Edit Claim History		
Date	Jan 23, 2007	
Claim Number	0	
Service Code	005B	
Units	1	
Location	1	
Amount Billed	\$26.40	
Amount Paid	\$26.40	
Premium Paid		
Total Paid on Claim	\$26.40	
Explanatory Code		
Doctor	1	
Run Code		
Agent	WCB	
Save	Egit	

Select Agent

On occasion a patient will have a number of paying agents on history. You may wish only to work with one agent at a time. Click on Select Agent then type in the agent you wish to work with (ie WCB). Only services for that agent will be displayed.

Select All

If you wish to select all displayed services, perhaps to change agent or mark as paid, click the Select ALL button. All displayed services will be highlighted just as if you had clicked on each one.

View Full History

After editing, deleting or marking services paid or unpaid it may be necessary to re-print the patient's invoice.

Add Service

If for some reason you wish to make a manual entry into the patient's history file just click the Add button. Navicert will allow you to add a service to the history area. Please note that this entry will go into the patient's history file but will NOT be sent to any third party agent for payment. Using this method of adjusting the patient's history is very unusual. The more common method would be to use the Enter Services function as previously described.

Accounts Receivable

🛎 Third Party - This Ft	inction ONLY deals with History N	OT pending Services 🗙
Start Date	9	
End Date	Feb 28, 2007	
Docto	r All Doctors	
O Printer 1 Printer 2	IX <u>A</u> ll Agents ☐ WCB	Reprint Invoices Detailed Summary Agent Summary Totals Only
O Dot Matrix O Laser I Windows	Select Other	Prepare Exit

Note: The Chiropractic Accounts Receivable screen will appear slightly different and will display a number of agents not displayed above however all functions work exactly as described here.

The Accounts Receivable screen allows you to check for unpaid accounts. Once you have identified unpaid accounts you can contact the patient or third party payer to determine the cause of the delay in payment.

By default, Navicert picks the last day of the previous month for the End Date. You may change this if you wish. The Start Date, by default, is left blank. If you wish you may type in a Start Date however services provided prior to the Start Date will be ignored by Navicert.

Once you have selected your Start and End dates you may select either All Doctors or select one specific doctor in your clinic to work with. Use the drop down box beside DOCTOR to select your choice.

Next you must select the agent(s) you wish to work with. You may wish to work with All Agents (which is the default choice) or you may wish to only work with, for example, WCB. If you check the Select Other box, Navicert will ask you to enter the agent that you wish to work with (ie 0001, 0004 or 0008). Agent 0001 is defined as Cash Payment for medical offices. Other numbers have no predefined meaning – they are agents which have been previously entered by your office.

Finally you must pick the type of report you wish to print.

- Reprint Invoices will reprint the full invoice for all matching data.
- Detailed Summary will print a summary of outstanding totals by patient.
- Agent Summary will print out a summary of the amounts outstanding by agent.
- Totals Only prints an aged accounts receivable for each doctor listing only the dollar totals outstanding.

When you have finished making your selections click the Prepare button. Navicert will ask the number of copies you wish to print. Usually if you are Reprinting Invoices you will want to print 2 copies (one to send, one to keep for your records). Otherwise you will likely only require one copy.

Duplicate Receipt

On occasion you will wish to issue a duplicate receipt to a patient for a service which has already been billed. Note that this function will simply print out the data you enter. Navicert does not check the validity of the data nor is any entry made in the patient's history regarding this receipt.

To issue a duplicate receipt you will first click on Third Party then click on Duplicate Receipt. Navicert will have you identify a patient. Next, fill in the blanks and click Next. Navicert will then print your invoice.

Usually duplicate receipts are used only for cash services. For this reason Chiropractors will generally enter the agent CASH while medical offices will enter the agent code 0001 (cash

payment by patient). While this is the usual method of using this function it would be possible to use the Duplicate Receipt function for any paying agent.



ADAMS,WENDY

Duplicate Receipt

O Reprint In	voices
O Detailed S	Summary
O Agent Sur	nmary
O Totals On	Iy
Prepare	E <u>x</u> it

Misc.



The Misc. Menu allows you to examine a patient history files or a series of patient history files. You can also locate claims by claim number.

To examine a patient history file clike on Misc. then on Examine History. You will be asked to identify the patient then you will see the patient's billing history screen.

As we have seen in previous sections of this manual you can print the patient history from this screen.

🛪 Examine P	atient His	tory											
Pre	evious Patie	ent			ADA	AMS,WE	NDY				*	<u>N</u> ext Pa	atient
Date	Claim #	Serv	Units	Loc.	Billed	Paid	Premium	TotalPaid	ICD	EX	Dr.	Run	Agent
Jan 23, 2007	10907	005B	1	1	26.40				616		1		MCIB
Jan 23, 2007	10907	012V	1	1	10.20				616		1		MCIB
Jan 23, 2007	10907	018V	1	1	4.30				616		1		MCIB
lan 23, 2007	10907	052T	1	1	15.00				616		1		MCIB
Jan 23, 2007	0	005B	1	1	26.40	26.40		26.40	Z07		1		WCB
Jan 23, 2007	0	012V	1	1	10.20	10.20		10.20	Z07		1		WCB
Jan 23, 2007	0	134A	1	1	47.60	47.60		47.60	Z07		1		WCB
lan 23, 2007	0	606×	1	1	72.00	72.00		72.00	Z07		1		WCB
an 11, 2006	10909	026B	8	2	176.00				Z07		4		MCIB
lan 01, 2006	10908	025B	10	2	220.00				Z07		4		MCIB
Agent: WC Print Statement Printer	B Options Selection	- Pri] Tor	tals: Selection	\$156.20	\$156.20	\$0.00	\$156.20					
⊂ Use ● Sek	Default Print ect Printer ptions		Print MC Print WC Print SG Print Th	IB Claim CB Claims I Claims ird Party	s	Start Date		Total Bil Total Pa Balance	led: id: :		\$156 \$156 \$0	.20 .20 .00	
Inst C Pre	ant Print view First		Print Ca:	sh Claims k All		End Date		<u>S</u> tat	ement			E <u>x</u> it	

Find Claim By Claim Number

If you are searching for a specific claim by claim number just click on Misc. then on Find Claim By Number. You will be asked for the claim number. If Navicert is able to locate a claim by that number it will display it. There are often multiple service codes under one claim and all matching claims will be displayed.

	Enter Clain	n To Search for: 109)7		<u>S</u> earch		E <u>x</u> it	
Patie	nt	PHN	Date	Claim Serv	Billed	Paid EX	Dr Run	Agent
ADAMS,	WENDY	140144269	Jan 23, 2001	7 10907 005B	26.40		1	MCIB
ADAMS .	WENDY	140144269	Jan 23, 2001	7 10907 0120	10.20		1	MCIB
ADAMS,	WENDY	140144269	Jan 23, 2001	7 10907 0180	4.30		1	MCIB
ADAMS .	WENDY	140144269	Jan 23, 2007	7 10907 052T	15.00		1	MCIB

Note that claim numbers are recycled. When you start the system, the first claim you bill is 10,000. The system continues billing up to 99,999 then returns to 10,000. For this reason large clinics that have been using the program for many years will likely have more than one claim number 10,000. Navicert will display all matches to the claim number you enter.

Hellp Menu:



The help menu allows you to check for on-line Updates, Send an E-Mail message to technical support, visit the CBS Web Site and read the About screen for Navicert.

Check for Update:

The Check For Update function allows you to connect to the CBS Navicert Web Site and make sure you have the latest version of the program. Navicert will remind you at least once a month to check for updates but you can certainly check more frequently if you wish. Just click the Check For Update button and Navicert will download and install the latest version of the program.



Updates and networks: It is generally a good idea to make sure that all terminals have exited from Navicert before installing a new update. Once one terminal downloads and installs the update, it will alert all the other terminals that they need to exit and update too. Each terminal will need to install the Navicert update to the local hard drive. It is never a good idea to run different versions of the software on several terminals at once.

Contact Technical Support:



The best way to reach technical support is by telephone. We do accept E-Mail messages and will attempt to deal with them in a timely manner but telephone support is our number 1 priority. If you want fast service, pick up the phone. You can always reach us at:

(800) 563-4666 or 569-1434 in Regina.

If you wish to send us an E-Mail you can click the E-Mail button or send your E-Mail to <u>cbshelp@gmail.com</u>.

Visit Us On-Line:

When you visit our web site you will be able to see all the latest information, download additional screen savers, updates to this manual and more. Come visit us any time.

Section II

Appointments

When you click the Appointments tab you will see the main appointment screen.

It's an action packed screen with many new features. CBS Customers upgrading from CBS Classic will certainly enjoy these new features after a brief adjustment period.

TERM9 Now Displaying:	PICS\SUNSET1.JPG						
Appointmer	nts	Electronic Medical	Records		Word Processing	Ì	Utilities
Paste	int 📥 Insert 🌂 Delet	• Pt. 😑	Block Slot		ait Phind Expl ist Type We Vie	and Ug g	Setup
1) DR. I. M. HAPPY	2) DR. JOE BROW	N (3) DR.	ADAM WEST	j́4)।	DR. T. HUBER		Ĭ
Copy Patient Browse	Patient Count:	AM 5 PM 0	Total: 5	•	octors Move Patient		ue, Jan 23, 2007 💌 🚺 Clinic Calendar
Drag Patient Here Remai	rk:				Drag Patient	Here	🖄 🛋 📥 📥 📥
Time Type Status	Name	Home	Work	Chart	Comment		oday Day Week Month Year
07:30A							
07:50A							Aonth Day Week Month Year
08:00A P/0 AU	ARCON, IRENE					_	
08:10A P/0 BA	RNARD, LOUISE AUNE					F.	Patient Details
08:20A P/0							lame
08:30A P/0 AD	IAMS, WENDY				REVIEW CARDIAC FUNCTIO	IN F	
08:40A P/0						E	amilu Dr
08:50A P/0 LA	MPBELL, ARCHIBALD					F	lef Doc
09:104 P/0						Ľ	
09:20A DE	SCHNER, CHARLOTTE				CHECK FOR ANEMIA	- E	This Appointment
09:30A NP							me
09:40A						C	reated
09:50A						A	mived
10:00A 1YR						S	een
10:10A						В	ooked By
10:20A						r	
10.30A NP							
10:504						- 4	Additional Notes:
11:00A 1YB						1	
11:10A							
11:20A							
11:30A NP							
11:50A							Arrived Seen Save Notes
01:00P 1YR							
01:10P						~	NextApt
							Last Apt
)							

Setting Up a Schedule:

To set up an appointment schedule for a doctor just click the Setup Schedule toolbar item or click File and Setup Schedule. You will see:

This screen looks a bit intimidating but it's very easy to use.



			نا (ت) (ت
📀 Set Tem	plate		
🔿 Set Indiv	ridual Days		
	ED		
4) Dr. T. HOL	,En	4	
All Days		-	
Start Time:	08:00 AM		
End Time:	05:00 PM		
Interval:	15		
Slots/Interval:	1	-	
		-	
	<u> </u>	-	

Step 1 is to click on Set Template. Pick the doctor from the Drop-Down box. Next set the system to All Days.

Put in the Start Time and End Time. Next put in the interval – this is the time between the appointments. Finally put in the number of slots per interval. For example, you may want one or two slots every 15 minutes.

When each of these settings is in place, click the Generate Schedule button. Your schedule will appear on the left side of the screen. You can now customize the schedule further. Click on a time slot then click the Delete button to remove that slot (for example, you may wish to remove the lunch hour slots).



You can insert slots if you wish to have extra slots at a specific time.

CBS Classic allowed you to block selected slots in Red. Navicert allows a range of colors and makes the selection process much easier. For example, if you wished to have a slot reserved for new patients at 8:45 you could mark the TYPE column with NP for New Patient. You may wish to have more time with a new patient so you may wish to block off the 9:00am slot. Just click at 8:45 and hold the mouse down. Drag your mouse across the 9:00am slot and both slots will be highlighted. You can highlight as many slots as you like in this manner. Once the desired slots are highlighted, click the BLOCK button. You will see:

🛢 Block Ap	opointment S	lots		
Set Ac	tion when boo blocked slo	iking in a t	Click to select a ne w Block Color	Block Selected Slots
None	C Warn	C Lock	Set Type	¹ Cu- <u>Unblock</u> Selected Slots
C None	🖲 Warn	C Lock	Set Type	STOP Block Entire Day
None	C Warn	C Lock	Set Type	<u>Unblock All</u>
None	C Warn	C Lock	Set Type	Exit
C None	C Warn	 Lock 	Set Type	Current Block Color
 None 	C Warn	C Lock	Set Type	
			Set Types	
V	lf a Patient	has been b	villed, Highlight with this color:	

Oh no! Another confusing screen. Don't worry – this one is really simple.

Just click the color you want (Light Green) then click the Block Selected Slots button. The slots you have selected will appear Green. We will cover blocking slots in more detail later in this manual.

🖻 Select Doc	tor Firs	t	
Time	Туре	Comment	~
08:00			
08:15			
08:30			
08:45	NP		
09:00			
09:15			
09:30			
09:45			
10:00			
10:15			
10:30			

Our appointment schedule is starting to take shape. We have a basic model for the average day in the clinic.

Don't forget to click the SAVE button or all your hard work will be lost.

But what about Wednesday afternoon when every good doctor goes out on the golf course? Sadly those days are long gone but it is likely that you will have some days that look a bit different from other days.

To set up a different schedule for (as an example) Wednesday, we would:

🛢 Select Do	ctor First								
Time	Turn	Constant							
I Ime	Type	Lomment							
08:15					Set Ter	nplate			
08:30					C Set Indi	vidual Days			
08:45									
09:00					4) DR. T. HU	BER	-		
09:15					A) Wednesda		-1		
09:30					(4) Wednesde	v .	<u> </u>		
09:45					Start Time:	08:00 AM	_		
10:00					E 17:	11.45.444	_		
10:15					End Time:	11:45 AM			
10:30					Interval:	15			
10:45					Slote /Interual:	1	-		
11:00					Siots/Interval.	<u> </u>	_		
11:15									
11:30							_		
11:45						· · · · ·			
	+ +					1			5
				a	Save		enera	te	
					_	 ,	cneu	lie	
					Plack	Sel	Doc	tor's	
					DIOCK		Color	S	
					Cot Status	~			ĩ.
				- -	Items	I In	sert S	lot	
							-	-	1
					Delete		Exit		
							_		
				Die:	bla Smart Cured				
			~	1 Disa	able small curso	4			

Click the drop-down and select Wednesday. Insert a Start and End time. Put in a Slots per interval value then click the Generate Schedule button.

From this point you can further customize the schedule by adding and removing slots, blocking with various colors, setting types and comments.

Again, once you are done, don't forget to hit the SAVE button.

Some systems pre-book a mountain of empty appointment slots. You need to manually pre-set up each month in advance or you can't use it. CBS does not use this process. That would make your database huge and it takes a lot of time. A Template is the basic way every Wednesday (for example) looks. You could go to the year 2050 and bring up a Wednesday and it will look like the one you have in your template.

But what if you want to change the template? No problem. Just go in and change your template at any time. Previously booked appointments will stay where they are and the rest of the day will change. Be a bit careful though. If you change from an interval of 15 minutes to an interval of 15 minutes, all the previously booked 15 minute appointments will remain. As an example you might have a 9:00, 9:10, a previously booked 9:15 appointment then a 9:20 appointment.

Set Individual Days Option:

What if you only want to change your template for a few weeks. Say for example the doctor wants to finish up early on Friday nights for the month of July and August to get out to the lake (wouldn't that be nice!).

In this case you don't want to change your Friday template because it will change the template for July, August and September, October and every month from that point on.

Instead you want to use the Set Days feature. PLEASE use this feature with great caution. This feature will pre-book empty appointment slots that take precedence over your regular template. There is no way to undo this except to use Set Days and book a different set of empty slots. Using this feature improperly will ruin your nice flexible template system. Changes to the regular template will have no effect on days that have been pre-booked with Set Days. Give us a call and talk it over if you like.

In general, only use Set Days for short periods of well defined time that have a definite start and stop date. When in doubt use Set Template – it's a lot easier to fix mistakes with Set Template.

Click on Set Individual Days. Next select the doctor and day (ie Friday). After that, put in the start Time and End Time. Insert your Interval time and slots per interval.

Now you need to enter your Start Date and your End Date.

Click Generate Schedule and further customize the schedule as you need.

When the schedule on the left of the screen looks exactly the way you want click SAVE. Navicert will override the template for the selected days and make blank appointment slots for the times selected.



Please double check the schedule before you save it – fixing an error is a bit tough.

To fix errors made using Set Days, the only method available is to start over using all the above steps and being careful to select the proper Start Date and End Date.

The appointment templates will not apply to days that have been set up this way but previously booked appointments will remain unchanged. Careful - if the doctor had a patient booked at 5pm then used Set Individual Days to book off at 2pm that 5pm appointment will remain in place.

Booking an Appointment:

Time	Туре	Status	Name	Home	Work	Chart	Comment	^
07:30A								
07:40A	NP	Missed	ADAMS, WENDY	(306) 555-1212	(306) 555-2121	456	NEW PATIENT	
07:50A								

Booking an appointment in Navicert is easy. Just click in the Name column and type the last name of your patient. You can also type the last name, a comma and then the first name. You can also type the PHN of the patient.

After entering the patient name you will see the patient information screen. You can edit patient information on this screen before you click the book button.

After the appointment is booked your patient will appear in the slot you selected. At this point you can enter an appointment type in the Type column. Appointment types must be no more than three letters. You may wish to make up a few standard appointment types for your office such as NP for New Patient or R for Review. The use of the Type column is optional – you do not have to use it.

You can enter a comment in the comment column if you wish. This is again optional.

You can not type directly in the Home, Work or Chart columns. These columns are filled in from the patient chart. If you wish to edit the phone numbers you will need to edit the patient chart. Just double click on the patient to bring up the chart, enter the information you wish and click Book or Update.

There is a column marked Status. This feature is included for backwards compatibility with CBS Classic. You can click on this slot to assign a status to the patient. For example you can change the status to Missed if a patient misses an appointment.

Selecting a Doctor

Selecting a Doctor is easy. Just click the tab with the doctor's name displayed. The system displays 6 doctors at a time. If your clinic has more than 6 doctors you will need to click the appropriate doctor button or pick a doctor from the drop-down menu.

Entering a New Patient In the Appointment System:

You can easily enter a new patient from the appointment screen. Just click in the Name column and type the word NEW then press <ENTER>. You will see the new patient screen appear.

Quite often when people book a patient over the telephone they don't get every last bit of information. When you are billing a patient you must enter all information in the first section of the screen (Name, Sex, DOB, PHN). When you are booking a patient from the appointment section this is not necessary. You only need to enter the first and last name to book the patient then click the Book button.

Of course before you are able to bill the patient you will need to enter the rest of the critical information.

Right Click Menu:



Navicert has a number of special short cut functions built into the Right Click menu. Just place your mouse over the patient and click with the right mouse button.

Most of these functions are also found on the tool bar at the top of the screen for backwards compatibility with CBS Classic.

Bill

One of the nicest new features of Navicert is the ability to quickly bill a patient from the appointment screen. Just right click on the patient and select Bill. Once the patient has been billed his appointment slot will change to bright green. At the end of the day you can quickly see at a glance which patients have been billed and which are left to bill.

Block

When we were setting up the initial patient schedule we took a brief look at the Block function. We will now go into this function in a bit more detail.



You will remember that you can click on just one slot or you can click on one slot and hold the mouse down as you drag over several slots. Once the slots are selected you can either click the Block toolbar item or you can right click and select Block. This will bring up the Block form: Take a look at the button marked Set Types near the bottom of the screen. This button allows you to change the meaning of the colors on the screen.

For example you could set light green to mean New Patients. You could set Blue to mean a visit with another health professional or Drug Rep.

🛱 Block Ap	pointment S	lots	
Set Act	ion when boo blocked slo	oking in a t	Click to sel
 None 	C Warn	C Lock	
C None	🖲 Warn	C Lock	
 None 	C Warn	C Lock	
 None 	C Warn	C Lock	
C None	C Warn	Cock	
 None 	C Warn	C Lock	

Take a look at the Action options. When a slot is "blocked" it is really just highlighted with a color. This doesn't really DO anything at all.

That is it doesn't DO anything unless you tell Navicert you want it to do something. What could a color do?

Warn is used to display a small warning message on the screen when a person starts billing a patient in a blocked slot.

Lock will totally disable the highlighted slot so that it can not be used.

In our example to the left, Orange $(2^{nd} \text{ from the top})$ is set to Warn while Light Magenta $(2^{nd} \text{ from the bottom})$ is set to Lock. None of the other colors do anything at all – except highlight the slot in color.

What else can we do? When we click the top button Block Selected Slots Navicert will block the highlighted slots on the appointment screen.

When we click Unblock Selected Slots, any previously blocked slots that are selected will become unblocked.

We can block the entire day with the selected color regardless of which (if any) slots are selected.

We can unblock all slots on the day by clicking Unblock All. Be careful – when you unblock All slots you can not undo the changes.



Previously in the Bill section we mentioned that the slot would be highlighted in Bright Green when it had been billed. You can actually turn this feature on or off by checking or unchecking this option:

🔽 If a Patient has been billed, Highlight with this color:

Unblock

Unblock also brings up the Block Screen to allow you to unblock the selected slots.

Copy

We should spend a moment looking at the copy function.

Let's take the example of a patient who sees the doctor. The doctor tells the patient to come back in two weeks. You can go in and book an appointment two weeks later BUT wouldn't it be nice if you could use a couple of mouse clicks to duplicate the appointment in the new spot? That's what Copy is for.

Step one is to select the patient appointment you wish to copy and get it into the Copy bin.

You can right click on a patient and select Copy or you click the Copy Toolbar Item. Navicert will take a copy of the patient and place them in a special holding bin located at the top left hand corner of the screen.

You can also click on the patient and while holding the mouse button down you can drag the patient into this holding bin. If you have a photo of the patient on file, that photo will appear on the screen. Otherwise a graphic will appear there. The patient name will appear under the picture.



There's one more way to add a patient into the Copy bin. If there is no patient already in the bin you can click the Browse button located in the top left hand corner.

Now what do you do with a patient in the holding bin? First find an empty appointment spot on the day you want. Now click on the picture in the copy bin and holding your mouse drag the appointment to the empty appointment slot.

You can also right click on the empty slot and click Paste.

Instantly the appointment will be booked in the slot you have selected.

Delete

To delete an appointment just right click on the appointment and click the Delete menu item.

Double Slot

Creates another appointment slot at the same time as the one selected.

Edit

When you right click and pick Edit the system will display the patient information. You can edit the information however you like then click the Update or Book button to save the changes. This is exactly the same as clicking the Edit toolbar icon or double clicking on the patient.

Insert

Even the best planned schedule needs a bit of a tweak now and again. You can insert an empty appointment slot anywhere in the day at any time. Just click the Insert toolbar item or right click anywhere on the appointment sheet and click Insert. You will see the Insert Appointment screen pop up.

🖻 Insert Ap	pointment Slot	
Time:	09 • 00 AM	
Туре:		
Comment:		
ſ		
	Save	E <u>x</u> it
	O <u>bave</u>	Exit

You do not have to fill in a type or a comment if you wish. Navicert will use a small > character to show inserted slots if you leave the Type blank.

Paste

We have previously discussed the Copy function. Past the a quick way to take a copy of the patient information in the Copy bin and paste them into the selected appointment slot.

Note that you can easily paste several appointments for the same patient. Sometimes it is necessary to set up 3 or 4 appointments for one patient.

When you are done making appointments for that patient you can copy another patient or you can click the Clear button to clear that patient out of the copy bin.

Move

Move is very much like the Copy function. Take a moment to review the copy function described above.

Move will take a copy of the patient and place them in the Move bin located at the top right hand corner of the screen. Once you click Paste or drag the patient out of the Move bin the original patient appointment will be deleted and a new one at a different time will be created. Basically the appointment will be moved to a different time and/or date – Moved.

Wipe

Wipe is used to remove an appointment time slot from the screen. It can be used to fine tune an appointment sheet. If you find that you are constantly wiping and inserting slots you probably need to go back to the Appointment Schedule setup function and adjust your template.

If there is an appointment booked in the slot you select to wipe, that appointment will be deleted.

Scrolling Through a Day

Patient Details
Name JONES, FRED
PHN 123456789
Dob Jan 01, 1963
Family Dr
Ref. Doc
This Appointment
Time Jan 23, 2007 07:40 AM
Created Jan 23, 2007 11:37 AM
Arrived
Seen
Booked By RBH
NEW PATIENT
Additional Notes:
Arrived Seen Save Notes
Next Apt Jan 29, 2007 Last Apt Jan 22, 2007

As you scroll up and down through the day you move the cursor over booked appointments. You should notice information on the right hand side of the screen changes.

Information like the PHN and DOB will be displayed along with the Family Dr. and Referring Doctor.

You will be able to see when the appointment was created and the initials of the person who booked the appointment (provided the appointment wasn't imported from CBS Classic during your upgrade).

If you wish there are a few more options you can use.

Arrived and Seen Buttons:

When a patient arrives in the clinic you can click the Arrived button. Navicert will record the time the patient arrived in the Arrived slot.

When the patient is seen by the doctor, just click the Seen button and the Seen slot will be filled in with the time the patient was seen.

Additional Notes:

You can also type in additional notes if the comment field isn't large enough and these notes will be tagged onto the patient appointment. Once you have typed the notes, don't forget to click the Save Notes button or the notes will be discarded once you click on another time slot.

Next Appointment / Last Appointment:

Next Apt Last Apt	Jan 29, 2007 Jan 22, 2007	
----------------------	------------------------------	--

The next and previous appointments for the highlighted patient are displayed in the bottom right hand corner of the screen.

Selecting the Appointment Date:



You can easily move around your appointments by clicking on the Day, Week, Month or Year buttons. The buttons with the right facing arrow move ahead through the calendar while left facing arrows move back.

You can click the drop down date at the top to see a calendar and instantly pick the day you wish or move to a different month.

Clicking the Today button instantly selects the current date.

•		Janu	ary 2	2007		►
Sun	Mon	Tue	Wed	Thu	Fri	Sat
31	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	ත	24	25	26	27
28	29	30	31	1	2	3
- 4	5	6	-7	8	9	10
Ő	Tod	lay: 1	1723/	/200	7	

Month Button

Clicking the Month Button displays the month at a glance showing a calendar that has a count of all appointments for the selected doctor. This will help you find a day that has a bit of free space.

S Month At A Glance						
January 2007	4) DI	R. T. HUBER				
Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
	1 Patiente: 0	2 Patients: 0	3 Patients: 0	4 Patientz: 0	5 Patients: 0	6 Patients: 0
7 Patients: 0	8 Patients: 0	9 Potients: 0	10 Patients: 0	11 Patients: 0	12 Patients: 0	13 Patients: 0
14 Patients: 0	15 Patients: 0	16 Patients: 0	17 Patients: 0	18 Patients: 0	19 Patients: 0	20 Patients: 0
21 Patienta: 0	22 Patients: 1	23 Patients: 7	24 Patients: 0	25 Patients: 0	26 Palients: 0	27 Patients: 0
28 Patients: 0	29 Patients: 1	30 Patients: 0	31 Patients: 0			
Total Monthly Cour	nt: 9	4) DR. T. HUBER		💌 🔶 Previa Mont	h Next Month	Egit

You can change doctors by clicking the doctor drop-down at the bottom of the screen.

You can select different months by clicking the Next or Previous Month buttons.

You can click on any displayed day and the system will take you to that date.

Clinic Calendar:



button in the upper right hand corner of the screen to open the screen.

Navicert comes with a handy Clinic Calendar. Just click the Clinic Calendar

This screen allows you to add scheduling items to a list for each day. You can add items to one specific doctor or for all doctors.

This is a great way to schedule your staff meetings, days off, OR days, etc.

You can put a heading in the light cyan area on by each day and click the Add button at the bottom of the screen to add individual items.



You will see that each day of the month is displayed along with a count of the number of items for that day. The selected day is highlighted in light pink. There is a print button both for the month as a whole and for the list of individual items.

Tool Bar Items:

Many of the tool bar items are also included in the right click menu and have already been discussed. There are a few very useful toolbar items that we still need to look at:

🗭 CB	S Navicert EMR v1.4 Site #367 TI	RM9 Now Displaying: PICS\SCENE33.	JPG		
Eile					
	Billing	Appointments	Electronic Medical Records	Word Processing	
	Bill Selected Patient Find Patient Apt.	Paste Rove Apt.	Notelete Pt. 😑 Block 🐼 Wipe	Wait Pind H Expand III	Setup Schedule
				····· · · · · · · · · · · · · · · · ·	

Find Appointment

The Find Appointment function is very helpful. Just click this button. Navicert will ask you to enter a patient name or PHN. After that, Navicert will display all appointments for the selected patient with the newest appointment at the top of the list.

			J	DNES, FRED	
Date	Time	Doctor	Туре	Reason	/
Jan 29, 2007	10:10 AM	4		REVIEW	
Jan 23, 2007	08:30 AM	4	P/0	REVIEW CARDIAC FUNCTION	
Jan 23, 2007	07:40 AM	4	NP	NEW PATIENT	
Jan 22, 2007	08:50 AM	4			
					1
	1	1		1	
				Print E	Evit
					<u>- x</u> it

Print

This function allows you to print appointment sheets.

First select the doctor (or All Doctors) you wish to print for. Next, select the appointment date or select a range of dates.

You can elect to skip empty appointment slots or print them.

You can print an appointment sheet in Portrait (Up and Down) or in Landscape (Sideways) format. Navicert prints slightly more information on each line when you select Landscape but obviously fewer lines per page. You can elect to split the AM and PM into two separate reports.

Finally you can elect to instantly print to the default printer or to select the output printer and you can select the number of copies to print. You can elect to double space the report for easier viewing.

Print Appointment Sh	eet 💶 🔀									
Doctor: All Doctors	_									
Start Date: Jan 23, 2007 End Date: Jan 23, 2007										
 Print Empty Slots Skip Empty Slots 	 Instant Print Preview First 									
 Portrait Landscape 	 Default Printer Select Printer 									
Split report AM/PM	Double Space									
Copies: 1										
Print	E <u>x</u> it									

Preview of Appointment Sheet Print-Out

Landscape:



Portrait:

a CB	S R	eceipt									
Doct	and	NOT USED	Hap Phone: (36	99 Sa 16) 1	Medi 123 Tes skatoon 3 555-1212 1	cal Clin tSt. 34V 2J9 Fax(306) 55	ic 5-2121	Date Printed: Feb Appointment Date	22, 2007 : Feb 22,	2007	
				0	0.00			We want to a	2005		1.01
Time	Pgp+	Patient Name	PHN	Sex	DOB	Home	Woth	Bemative	ICD	Fee Codes	_^
00:30J		AADLAND, DONNA	230112900	8	Aug 20, 1950	(306)295-3645	(306)297-3669				_
30:452											_
19:00.8											_
19:15.8											
19:30.8		BAAN, HARRY	250030004	м	Sep 01, 1907	(305)135-2542					
19:452		CARALHIN, VIRGINIA	500691762	F	Not 14, 1945	(306) 505-6165					
10:00.8		D ANTOU, EVE	391306999	F	04.03, 1971	(306)775-1470	(306)700-7903				
10:15#											
10:304											
10:454				-							_
11-00.4	_		-	-							- 1
11-144	_		-	-							-
11.102	-		-	-							-
11.507	-		-	-							- 11
_	-		-	-							-1
	_			-					+ +		-1
	_			-	-						-1
	_			-							-1
				_							_
				_							_
				L							
				L							
-											
								Print		Egit	

Waitlist

Navicert has two related features. One is the Waitlist and the other is the Recall List which was discussed in the billing section.

The waitlist is for patients you would like to book an appointment for but don't presently have an empty appointment slot.

🖣 Waiting Lis	it						
		D	octor: All D	octors		<u>•</u>	
Date Added	Name	PHN	Home	Work	DR	Reason	Remark
M <u>S</u> e	arch	Patient	Remove Patient	 I 	E_dit	Book Apt.	Print Exit

The Waitlist shows all patients who are presently waiting for an appointment. You can add patients to the list, delete them from the list and give them an appointment (thus removing them from the waiting list).

Search:	Allows you to locate one individual patient on the list
Add Patient:	Add a patient to the waiting list.
Remove Patient:	Remove the patient from the waiting list.
Edit:	Edit the patient's waiting list entry.
Book Apt:	Takes the patient off the list and inserts the patient into the appointment sheet.
Print:	Prints the waiting list

Tool Bar Items Continued...

Find Type

CBS Navicert EMR v1.4 Site #367 TI	ERM9 Now Displaying: PICS\SCENE33.	JPG									
<u>F</u> ile											
Billing	Appointments	Electronic Medical Records	Word Processing								
🧼 Selected 🚡 Find 🖺 Copy 📝 Paste 🕞 Move 👍 Print 🦳 Insert 🗞 Delete 🔎 Edit 🖨 Block 🐼 Vipe 😰 Wait 🔎 Find 👬 Expand 🖾 Setup Patient											
			····· · · · · · · · · · · · · · · · ·								

This toolbar item lets you search the appointment system to find an empty appointment slot of the type you specify. For example if you were looking for an empty New Patient slot you would type NP. Navicert would search for the next empty slot with NP in the type column.

Expand View

The Expanded View function brings up an overview form that lets you view a full week at a glance or patients for up to 7 doctors at once:

View 7 Days: This shows a full week at a glance for one doctor.

You can click on the arrow's under Select Doctor to change from one doctor to another. You can do the same thing with the arrows under Select Week. You can also click the Print button to print the sheet. You can click on any appointment slot and the system will take you to that day and time.

Select Doctor Select Week Image: Select Week Image: Select Week Image: Select Week	🖨 Expa	Expanded Appointment View															
Image: Substrate State Image: State State Image: State State				Select D	octor		Sel	ect Week									
<th <="" colspan="2" th=""><th></th><th></th><th></th><th></th><th>_</th><th></th><th><i>A</i></th><th></th><th></th><th></th><th></th><th>C View</th><th>v 7 Docto</th><th>ors</th><th></th></th>	<th></th> <th></th> <th></th> <th></th> <th>_</th> <th></th> <th><i>A</i></th> <th></th> <th></th> <th></th> <th></th> <th>C View</th> <th>v 7 Docto</th> <th>ors</th> <th></th>						_		<i>A</i>					C View	v 7 Docto	ors	
Interview List List Sunday Jan 22, 2007 Tuesday Jan 23, 2007 Flutady Jan 25, 2007 Finday Jan 25, 2007 Sunday Jan 22, 2007 Sunday Jan 22, 2007 Sunday Jan 22, 2007 Finday Jan 25, 2007 Finday Jan 25, 2007 Sunday Jan 22, 2007 Time Name Time Name Time Name OVER 10, 2007 08:100A OVER 2006 OVER 2006 OVER 2006 OVER 2006 OVER 2006 OVER 2007 Sunday Jan 22, 2007 OVER 2006 OVER 2007 Sunday 2007 <th colspan<="" td=""><td></td><td colspan="8"></td><td></td><td></td><td></td><td>v 7 Days</td><td></td><td></td></th>	<td></td> <td colspan="8"></td> <td></td> <td></td> <td></td> <td>v 7 Days</td> <td></td> <td></td>													v 7 Days			
Intercept (1) DR. T. HUBER Link Link			_		_		_							E-ih			
Sunday Jan 21, 2007 Monday Jan 22, 2007 Tuesday Jan 23, 2007 Thursday Jan 24, 2007 Thursday Jan 25, 2007 Finday Jan 26, 2007 Saturday Jan 27, 2007 Time Name Name Time Name Name Name		4) DR. T. HUBER												Exit			
Time Name Time Name <th< th=""><th>Sund</th><th>lay Jan 21, 2007</th><th>Mon</th><th>iday Jan 22, 2007</th><th>Tues</th><th>:day Jan 23, 2007</th><th>Wedne</th><th>esday Jan 24, 2007</th><th>Thur</th><th>sday Jan 25, 2007</th><th>Frid</th><th>ay Jan 26, 2007</th><th>Saturd</th><th>ay Jan 27, 200</th><th>7</th></th<>	Sund	lay Jan 21, 2007	Mon	iday Jan 22, 2007	Tues	:day Jan 23, 2007	Wedne	esday Jan 24, 2007	Thur	sday Jan 25, 2007	Frid	ay Jan 26, 2007	Saturd	ay Jan 27, 200	7		
08:00A 09:00A 07:30A 07:30A 07:30A 07:30A 08:15A 07:40A 07:50A 07:40A 08:40A	Time	Name	Time	Name	Time	Name	Time	Name	Time	Name	Time	Name	Time	Name	^		
10e 15A 09:15A 07:40A 07:40A 07:40A 07:40A 08:30A 09:30A 07:50A 07:50A 07:50A 07:50A 08:45A 08:45A 08:00A 07:50A 07:50A 07:50A 09:00A 09:50A 00:00B 08:45A 08:45A 08:00A 09:00A	08:00A		08:00A		07:30A		08:00A		08:00A		07:30A		07:30A				
108.30A 08.30A 07.50A 07.50	08:15A		08:15A		07:40A	JONES, F	08:15A		08:15A		07:40A		07:40A				
10845A 08.00A 0.08.00A 0.08.00A <t< td=""><td>08:30A</td><td></td><td>08:30A</td><td></td><td>07:50A</td><td>SMITH, F</td><td>08:30A</td><td></td><td>08:30A</td><td></td><td>07:50A</td><td></td><td>07:50A</td><td></td><td></td></t<>	08:30A		08:30A		07:50A	SMITH, F	08:30A		08:30A		07:50A		07:50A				
19900A 09:00A 09:00A 09:00A 09:00A 09:10A 09:10A 09:15A 09:00A 09:15A 09:15A 09:20A 09:15A 09:20A	08:45A		08:45A		08:00A	ALARCON, I	08:45A		08:45A		08:00A		08:00A				
19:15A 09:00A 09:20A 09:15A 09:15A 09:20A	09:00A		08:50A	JONES, F	08:10A	BARNARD, L	09:00A		09:00A		08:10A		08:10A				
19:30A 09:30A 09:10A 09:00A 00:00A 00:00A	09:15A		09:00A		08:20A		09:15A		09:15A		08:20A		08:20A				
19343 09304 09404 09454 09454 09404 09404 09404 101004 09304 09004 10004 09004 09504 09504 09504 10154 10104 09004 10154 10154 09104 09104 10304 10154 10154 09104 09104 09104 104554 10304 09104 09104 09104 09104 104554 10454 10454 09104 09104 09104 11454 10454 10454 09204 09204 09204 11454 11454 11454 11454 09304 09304 11454 11154 09504 11454 11454 09504 09304 11454 11454 11454 11454 10004 10004 10004 11200P 11454 11454 11454 10004 10004 10004 12200P 10404 12459 1240P 10004 10004 10004 1230P 1230P 10304 10204	09:30A		09:15A		08:30A	JONES, F	09:30A	PACHOLKO, S	09:30A		08:30A		08:30A				
10:00A 09:45A 09:50A 09:50A 09:50A 09:50A 10:15A 10:00A 09:00A 10:15A 09:00A 09:00A 09:00A 10:30A 10:15A 09:00A 09:00A 09:00A 09:00A 09:00A 10:30A 10:15A 09:00A 09:00A 09:00A 09:00A 09:00A 10:45A 10:30A 09:20A DESCHNER, C 10:45A 09:30A 09:30A 11:15A 11:00A 09:30A 11:15A 09:30A 09:30A 11:30A 11:30A 09:30A 09:30A 09:30A 09:50A 11:30A 11:30A 09:50A 09:50A 09:50A 09:50A 11:30A 11:30A 10:30A 09:50A 10:00A 10:00A 12:00P 11:45A 11:45A 11:45A 10:00A 10:00A 12:00P 10:10A 12:20P 10:00A 10:00A 10:00A 12:30P 10:30A 12:30P 10:30A 10:30A 10:30A </td <td>09:45A</td> <td></td> <td>09:30A</td> <td></td> <td>08:40A</td> <td></td> <td>09:45A</td> <td></td> <td>09:45A</td> <td>JACOBS, T</td> <td>08:40A</td> <td></td> <td>08:40A</td> <td></td> <td></td>	09:45A		09:30A		08:40A		09:45A		09:45A	JACOBS, T	08:40A		08:40A				
1015A 10.00A 09.00A 10.15A 10.15A 09.00A 09.00A 1033A 10.15A 09.10A 10.30A 09.10A 09.10A 10.30A 10.15A 09.20A DESCHNEP, C 10.45A 09.20A 09.20A DESCHNEP, C 10.45A 09.20A 09.20A DESCHNEP, C 10.45A 10.45A 09.20A 09.30A 09.30A 09.30A 09.30A 09.30A 09.30A 09.30A 11.35A 11.15A 11.15A 09.40A 09.40A 0.50A 09.40A 09.40A 0.50A 09.40A 01.40A 01.40A 01.40A 10.4	10:00A		09:45A		08:50A	CAMPBELL, A	10:00A		10:00A		08:50A		08:50A				
10:30A 10:15A 09:10A 10:30A 10:30A 09:10A 09:10A 11:045A 10:30A 09:20A 09:20A 09:20A 09:20A 11:045A 10:45A 10:45A 10:45A 09:20A 09:20A 09:20A 11:10A 10:45A 09:30A 11:00A 09:30A 09:30A 09:30A 11:15A 11:00A 09:40A 11:15A 09:40A 09:40A 09:40A 11:30A 11:15A 09:40A 09:50A 09:50A 09:50A 09:50A 11:45A 11:30A 10:00A 11:45A 11:45A 10:00A 10:00A 12:20P 11:45A 11:45A 11:45A 10:00A 10:00A 12:20P 12:20P 10:20A 12:20P 10:10A 10:20A 12:20P 12:20P 10:30A 12:30P 10:30A 10:30A 12:30P 10:20A 12:30P 10:30A 10:30A 10:30A 11:45A 01:00P 01:00P 10:40A 11:40A 10:40A 01:45P 12:45P 10:424P 1	10:15A		10:00A		09:00A		10:15A		10:15A		09:00A		09:00A				
10.45A 10.30A 09.20A DESCHNER, C 10.45A 09.20A RICHARDS, R 09.20A 11.100A 10.45A 09.30A 11.100A 09.30A 09.30A 11.15A 11.00A 09.40A 11.15A 09.40A 09.40A 11.13A 11.15A 09.40A 09.40A 09.40A 09.50A 09.50A 11.13A 11.15A 11.30A 11.30A 09.50A 09.50A 09.50A 11.45A 11.45A 11.45A 11.45A 10.00A 11.45A 10.00A 10.00A 12.00P 11.45A 10.10A 12.00P 10.10A 10.10A 12.30P 12.15P 10.20A 12.15P 10.20A 10.20A 12.30P 12.30P 10.30A 12.30P 10.30A 10.30A 12.45P 12.45P 10.40A 10.40A 10.40A 10.40A 01.00P 12.45P 10.40A 01.00P 10.50A 10.50A 01.00P 11.20A 01.15P 11.10A 11.40A 11.40A 01.45P 11.45A 01.45P	10:30A		10:15A		09:10A		10:30A		10:30A		09:10A		09:10A				
11:00A 10.45A 09:30A 11:00A 11:00A 09:30A 09:30A 11:15A 11:15A 11:15A 11:15A 09:40A 09:40A 11:30A 11:15A 09:50A 11:30A 09:50A 09:50A 11:45A 11:30A 11:30A 09:50A 09:50A 10:00A 11:45A 11:30A 10:00A 11:45A 10:00A 10:00A 11:45A 11:30A 10:00A 11:45A 10:00A 10:00A 12:00P 11:45A 10:10A 12:00P 10:10A 10:00A 12:30P 12:20P 10:20A 12:30P 10:20A 10:20A 12:30P 12:30P 10:30A 12:20P 10:30A 10:30A 11:45A 11:00A 01:00P 10:20A 10:30A 11:23P 10:30A 12:20P 10:30A 10:30A 12:30P 12:30P 10:40A 10:40A 10:40A 01:15P 11:00A 01:15P 11:00A 11:50A 01:15P 01:10P 11:00A 01:15P 11:00A 11:00A<	10:45A		10:30A		09:20A	DESCHNER, C	10:45A		10:45A		09:20A	RICHARDS, R	09:20A				
11:15A 11:00A 09:40A 11:15A 11:15A 09:40A 09:40A 11:30A 11:30A 09:50A 11:30A 09:50A 09:50A 11:45A 11:30A 10:30A 09:50A 09:50A 10:00A 11:45A 11:30A 10:30A 10:30A 09:50A 09:50A 11:45A 11:30A 10:00A 11:45A 10:00A 10:00A 12:00P 11:45A 10:10A 12:00P 10:10A 10:00A 12:15P 12:00P 10:20A 12:30P 10:30A 10:30A 12:45P 12:30P 10:30A 12:30P 10:30A 10:30A 11:45A 01:00P 10:50A 01:00P 10:40A 10:40A 01:15P 11:00A 01:15P 11:00A 10:50A 01:15P 01:00P 11:00A 01:15P 11:00A 11:00A 01:45P 01:30P 01:45P 11:20A 11:20A 11:20A 01:45P 01:30P 01:45P 11:20A 11:20A 11:20A 02:00P 01:30P 01:45P<	11:00A		10:45A		09:30A		11:00A		11:00A		09:30A		09:30A				
11:30A 11:15A 09:50A 11:30A 11:30A 09:50A 09:50A 11:45A 11:30A 10:00A 11:45A 11:45A 10:00A 10:00A 11:45A 11:45A 10:00A 11:45A 10:00A 10:00A 10:00A 12:00P 11:45A 10:10A 12:00P 10:10A 10:10A 12:30P 12:00P 10:20A 12:30P 10:20A 10:20A 12:30P 12:30P 10:30A 12:30P 10:30A 10:30A 12:30P 12:30P 10:30A 12:30P 10:30A 10:40A 11:23P 12:30P 10:40A 12:45P 10:40A 10:40A 01:00P 12:45P 10:40A 10:40A 10:40A 10:40A 01:00P 11:50A 01:15P 11:15P 11:10A 11:00A 01:30P 01:15P 11:10A 01:30P 11:10A 11:00A 01:45P 01:45P 01:45P 11:43A 11:40A 11:40A 02:00P 01:45P 11:30A 02:15P 02:145P 11:40A	11:15A		11:00A		09:40A		11:15A		11:15A		09:40A		09:40A				
11:45A 11:30A 10:00A 11:45A 11:45A 10:00A 10:00A 12:00P 11:45A 10:10A 12:00P 10:10A 10:10A 12:15P 12:00P 10:20A 12:15P 10:20A 10:20A 12:30P 12:15P 10:30A 12:30P 10:30A 10:30A 12:45P 12:30P 10:30A 10:30A 10:30A 11:45A 10:00P 10:30A 10:30A 10:30A 11:45P 12:30P 10:40A 12:45P 10:40A 10:40A 01:00P 12:45P 10:40A 10:40A 10:40A 10:40A 01:15P 01:00P 10:00A 01:15P 11:10A 10:60A 01:30P 01:15P 01:15P 11:10A 11:00A 11:00A 01:30P 01:15P 01:30P 11:10A 11:00A 11:00A 01:30P 01:30P 11:10A 01:30P 11:20A 11:20A 02:00P 01:30P 11:30A 02:00P 11:30A 11:30A 02:15P 02:00P 11:30A 02:00P<	11:30A		11:15A		09:50A		11:30A		11:30A		09:50A		09:50A				
12:00P 11:45A 10:10A 12:00P 10:10A 10:10A 12:15P 12:00P 10:20A 12:15P 12:15P 10:20A 10:20A 12:30P 12:15P 10:20A 12:15P 10:20A 10:20A 12:30P 12:15P 10:30A 12:30P 10:30A 10:30A 12:45P 12:30P 10:40A 12:45P 10:40A 10:40A 10:00P 12:45P 10:40A 10:40A 10:40A 10:40A 10:00P 12:45P 10:40A 10:40A 10:40A 10:40A 01:00P 10:40A 01:00P 01:00P 10:50A 10:40A 01:15P 01:00P 11:50A 01:15P 11:00A 11:00A 01:45P 01:45P 01:45P 01:45P 11:40A 11:20A 02:00P 01:45P 01:45P 01:45P 11:20A 11:30A 02:00P 01:45P 01:45P 01:45P 11:40A 11:40A 02:00P 01:45P	11:45A		11:30A		10:00A		11:45A		11:45A		10:00A		10:00A				
12:15P 12:00P 10:20A 12:15P 12:15P 10:20A 10:20A 12:30P 12:15P 10:30A 12:20P 12:30P 10:30A 10:30A 12:45P 12:30P 10:40A 12:45P 10:40A 10:40A 10:40A 01:00P 12:45P 10:40A 01:00P 10:50A 10:50A 01:15P 01:10P 10:50A 01:00P 10:50A 10:50A 01:15P 01:10P 11:10A 01:30P 11:10A 11:00A 01:45P 01:30P 11:10A 01:45P 11:20A 11:00A 02:00P 01:45P 11:20A 01:45P 11:20A 11:20A 02:00P 01:45P 11:30A 02:00P 11:30A 11:40A 02:15P 02:00P 11:50A 02:15P 11:40A 11:40A 02:30P 02:15P 02:30P 11:50A 11:50A 11:50A 02:30P 02:15P 02:30P 01:40P 12:00P 12:00P	12:00P		11:45A		10:10A		12:00P		12:00P		10:10A		10:10A				
12.30P 12.15P 10.30A 12.30P 12.30P 10.30A 10.30A 12.45P 12.30P 10.40A 12.45P 12.45P 10.40A 10.40A 01.00P 12.45P 10.40A 01.00P 10.50A 10.50A 01.15P 01.00P 11.50A 01.15P 11.60A 11.50A 01.15P 01.15P 11.10A 01.15P 11.10A 11.10A 01.45P 01.30P 01.15P 11.10A 11.10A 01.45P 01.30P 01.45P 11.20A 11.20A 02.00P 01.45P 11.30A 02.00P 11.30A 11.20A 02.00P 01.45P 11.30A 02.00P 11.30A 11.30A 02.30P 02.00P 11.30A 02.00P 11.30A 11.40A 02.30P 02.00P 11.30A 02.00P 11.30A 11.40A 02.30P 02.00P 01.30P 02.30P 11.40A 11.40A 02.30P 02.30P 01.00P	12:15P		12:00P		10:20A		12:15P		12:15P		10:20A		10:20A				
12.45P 12.43P 10.40A 12.45P 10.40A 10.40A 01:00P 12.45P 10.50A 01:00P 10:50A 10:50A 01:15P 01:00P 10:50A 01:00P 10:50A 10:50A 01:15P 01:00P 11:00A 01:15P 11:00A 11:00A 01:30P 01:15P 11:10A 01:30P 11:10A 11:10A 01:45P 01:45P 01:45P 11:44SP 11:20A 11:20A 02:00P 01:45P 11:30A 02:00P 11:30A 11:30A 02:20P 01:45P 01:45P 01:45P 11:40A 11:40A 02:20P 01:45P 01:45P 01:45P 11:40A 11:40A 02:20P 01:45P 02:20P 11:50A 11:50A 11:50A 02:30P 02:15P 02:30P 02:15P 11:50A 11:50A 02:30P 02:15P 01:00P 02:30P 11:50A 11:50A 02:30P 02:15P 02:45P	12:30P		12:15P		10:30A		12:30P		12:30P		10:30A		10:30A				
[01:00P] 12:45P 10:50A 01:00P 01:00P 10:50A 10:50A 01:15P 01:00P 11:00A 01:15P 01:15P 11:00A 11:15P 01:30P 01:15P 11:10A 01:30P 01:30P 11:10A 11:00A 01:30P 01:30P 11:10A 01:30P 11:10A 11:00A 02:00P 01:30P 11:10A 01:45P 11:20A 11:20A 02:00P 01:30P 11:30A 02:00P 11:30A 11:30A 02:00P 01:30P 02:00P 02:30P 11:30A 11:40A 02:30P 02:00P 02:30P 02:15P 11:40A 11:40A 02:30P 02:15P 02:30P 11:50A 11:40A 11:40A 02:30P 02:15P 02:30P 11:50A 11:50A 11:50A 02:30P 02:15P 02:45P 01:00P 12:00P 12:00P 03:00P 02:20P 03:00P 03:15P 01:00P 12:10P	12:45P		12:30P		10:40A		12:45P		12:45P		10:40A		10:40A				
[01:15P] 01:00P 11:00A 01:15P 01:15P 11:00A 11:00A 01:30P 01:15P 11:10A 01:30P 11:10A 11:10A 01:30P 01:15P 11:10A 01:45P 01:30P 11:10A 11:00A 01:45P 01:30P 11:20A 01:45P 01:45P 11:20A 11:20A 02:00P 01:45P 01:45P 01:45P 11:30A 11:30A 02:15P 02:00P 11:50A 02:15P 11:40A 11:40A 02:20P 02:15P 01:00P 02:30P 11:50A 11:50A 02:30P 02:15P 01:00P 02:30P 11:50A 11:50A 02:30P 02:15P 01:00P 02:30P 11:50A 11:50A 02:30P 02:30P 01:00P 02:45P 01:00P 12:00P 03:00P 02:45P 01:00P 03:00P 01:10P 12:10P	01:00P		12:45P		10:50A		01:00P		01:00P		10:50A		10:50A				
[11:30] 01:15P 11:10A 01:30P 01:30P 11:10A 11:10A 01:45P 01:45P 01:45P 01:45P 11:20A 11:20A 02:00P 01:45P 11:30A 02:00P 11:30A 11:20A 02:00P 01:45P 11:30A 02:00P 11:30A 11:30A 02:30P 02:15P 02:30P 11:50A 11:45A 11:40A 02:30P 02:15P 02:30P 02:30P 11:50A 11:50A 02:30P 02:15P 01:00P 02:30P 11:50A 11:50A 02:30P 02:15P 01:00P 02:30P 11:50A 11:50A 02:30P 02:15P 01:00P 02:30P 11:50A 11:50A 02:30P 02:15P 02:30P 01:00P 12:00P 12:00P 03:00P 02:30P 03:00P 01:00P 12:00P 12:00P	01:15P		01:00P		11:00A		01:15P		01:15P		11:00A		11:00A				
[11:3P] (11:3P] (11:2A] (11:4P] (11:2A] (11:2A] 02:0P 01:45P 01:45P 01:45P 11:20A 11:20A 02:0P 01:45P 02:0P 11:30A 02:0P 11:30A 11:30A 02:15P 02:0P 01:45P 02:15P 01:45P 11:40A 11:40A 02:30P 02:15P 01:0P 02:30P 11:50A 11:50A 02:30P 02:15P 01:0P 02:30P 11:50A 11:50A 02:30P 02:10P 02:30P 02:30P 11:50A 11:50A 02:30P 02:30P 01:0P 02:30P 02:45P 01:00P 12:0P 03:00P 02:45P 01:20P 03:00P 03:00P 01:10P 12:0P 03:15P 03:00P 01:35P 03:15P 01:20P 12:20P	01:30P		01:15P		11:10A		01:30P		01:30P		11:10A		11:10A				
102:00P 01:45P 11:30A 02:00P 102:00P 11:30A 11:30A 02:15P 02:00P 11:50A 02:15P 02:15P 11:40A 11:40A 02:30P 02:15P 01:00P 02:30P 02:15P 11:40A 11:50A 02:30P 02:30P 01:00P 02:30P 02:30P 11:50A 11:50A 02:45P 02:30P 01:00P 02:45P 01:00P 12:00P 03:00P 02:45P 01:00P 03:00P 01:10P 12:10P 03:15P 03:00P 01:30P 03:15P 01:20P 12:20P ✓	01:45P		01:30P		11:20A		01:45P		01:45P		11:20A		11:20A				
[02:15P] 02:00P 11:50A 02:15P 11:40A 11:40A 02:30P 02:19P 01:00P 02:20P 02:30P 11:50A 11:50A 02:45P 02:30P 01:10P 02:45P 02:20P 11:50A 11:50A 02:45P 02:30P 01:10P 02:45P 02:20P 11:50A 11:50A 03:00P 02:30P 01:10P 02:45P 01:00P 12:00P 03:05P 01:20P 03:00P 03:05P 01:10P 12:10P	02:00P		01:45P		11:30A		02:00P		02:00P		11:30A		11:30A				
[02:30P] 02:15P 01:00P 02:30P 02:30P 11:50A 11:50A [02:45P] 02:30P 01:10P 02:45P 01:00P 12:00P [03:00P] 02:45P 01:00P 03:00P 03:00P 01:10P 12:10P [03:15P] 03:00P 01:30P 01:15P 01:20P 12:20P ✓	02:15P		02:00P		11:50A		02:15P		02:15P		11:40A		11:40A				
[02:45P] 02:30P 01:10P 02:45P 02:45P 01:00P 12:00P 03:00P 02:45P 01:20P 03:00P 03:00P 01:10P 12:10P 03:05P 03:00P 01:30P 03:15P 01:00P 12:20P ✓	02:30P		02:15P		01:00P		02:30P		02:30P		11:50A		11:50A				
03:00P 02:45P 01:20P 03:00P 03:00P 01:10P 12:10P 03:15P 03:00P 03:15P 03:15P 01:20P 12:20P ✓	02:45P		02:30P		01:10P		02:45P		02:45P		01:00P		12:00P				
03:15P 03:00P 01:30P 03:15P 03:15P 01:20P 12:20P 🛩	03:00P		02:45P		01:20P		03:00P		03:00P		01:10P		12:10P				
	03:15P		03:00P		01:30P		03:15P		03:15P		01:20P		12:20P		~		
View 7 Doctors:

			Calaat D			0-1	t We - t							
			Felect D			Æ					© Viev C Viev	v 7 Doct v 7 Day:	ors 3	
				Tue	sday Jan 23,	2007					Print		E <u>x</u> it	
1) DR.	I. M. HAPPY	2) DF	I. JOE BROWN	3) D F	R. ADAM WEST	4)	DR. T. HUBER							
Time	Name	Time	Name	Time	Name	Time	Name	Time	Name	Time	Name	Time	Name	
09:00A		08:00A		08:30A		07:30A								
09:00A		09:00A		08:45A		07:40A	JONES, F							
09:15A		10:00A		09:00A		07:50A	SMITH, F							
09:154		11:00A		09:15A		08:00A	ALARCON, I							
09:30A		12:00P		09:30A		08:104	BARNARD, L							_
09:3UA		01:00P		09:45A		08:2UA	101150 5							_
09:454		02:00P		10:00A		08:304	JUNES, F							_
10.004		03:00P		10:134		08:404	CAMPBELL A							-
10:00A		04.001		10.30A		00.304	CAMI DELL, A							-
10:154				11.004		09:104								-
10:154				11.154		09:204	DESCHNER C							-
10:30A				11:30A		09:30A								-
10:30A						09:40A								-
10:45A						09:50A								-
10:45A						10:00A								
11:00A						10:10A								
11:00A						10:20A								
11:15A						10:304								
11:15A						10:40A								
11:30A						10:50A								
11:30A						11:00A								
11:45A						11:10A								
11:45A						11:20A								_
12:00P						11:3UA								_
12:00P						11:5UA								_
12:15P						01:00P								4
12.10F						01:10P								-
12.30						TOT:20P								4

Clicking this menu item will display up to 7 doctors for the selected day.

You can click on the arrow's under Select Doctor to change from one doctor to another. You can do the same thing with the arrows under Select Day. You can also click the Print button to print the sheet.

You can double click on any appointment slot to view that appointment day and time.

Section III

Electronic Medical Records

Patient: ADAMS, WEN	Patient: ADAMS, WENDY PHN: 14014				39 DOB: Jan 01, 1963 Last Visit:				<u>s</u>		
Height: 5'10" Weight:	148lbs	B.P. 120/68	Age: 44	Sex:	F Pulse: 62		Nex	tt Visit:		<u></u>	
Current Summary Past Sum	mary /	Additional Info	Recent Vis	its	Labs	Scans		Faxes		Forms	Misc
Current Problems	Presenting (Complaint :: LOW BACK	PAIN				_	Doctor: 1	Visit	Date: Jun 2	23, 2007
Current Medications Jun 23, 2007 - FLEX-10 TABLETS Alernies	Visit Da	te COW BAC	Complaint X PAIN	E	Subjective PAIN ON FORWA FLEXION Objective REDUCED LUME ABNORMAL GAIT REFLEX	RD BENDING, AR RANGE OF , INCREASED	PAI FMO LEF	DITION, T PATELLAR		SOAP Note Template Note Print Height: 51 Weight: 14 B.P.: 12 Temp: 98 Pulse: 62 Vision: 20 Alcohol: 5c	Clinic Note Edit Delete 0" 8lbs 0/68 .6F
CAT FUR DUST					Plan Medication:			-		Drugs: no Smoking no Misc:	ne
Notes: Sample SDAP note				Ŧ	FLEX-10 TABLET Lab Tests Ordere Lumbar spine	S 10MG, d:				Created O Record has Reco	n: Jun 23, 2007 s not been edited ord is Valid

CBS Navicert EMR is a paperless office solution designed to manage patient medical information. It is simple to use, inexpensive and very full featured.

First Step: Select the Patient



The first step in any Electronic Medical Record is to identify the patient. Click the Toolbar Item that says Select Patient. Once your patient has been selected you are ready to begin.



Next Step: Start a New Soap Note: Just click the Toolbar Icon New S.O.A.P. Note



As you go through the following pages we will outline each section in detail. You will notice there are a lot of buttons to click on. To speed things up we suggest you use the Wizard button to quickly construct your SOAP note. The Wizard

takes you through each of the following steps one after the other with a minimum of effort. You will find the Wizard button at the bottom of the screen:

S.O.A.P. stands for:

Subjective:	The patient's complaint described in their own words
Objective:	The objective and relevant clinical findings of the Physician.
Assessment:	The physician's diagnosis or differential diagnosis
Plan:	The physician's treatment plan.

This is the organizational format taught by many medical colleges. Notes organized in this manner are generally concise and easy to follow.

To enter a new SOAP note just click the New Soap Note toolbar item. You will then the SOAP Note entry screen:

S.O.A.P. Note	
Presenting Complaint	Summary
Complaint:	Presenting Complaint
Doctor: 1 DR. I. M. HAPPY Visit Date: Jan 23, 2007	Comprant
Subjective	Subjective
Symptoms, patient description, etc.	Subjective
Objective	Objective
Physical Exam Findings	Dbjective
Height: Weight: Smoking: Drugs:	
BP: V Temp: Pulse Vision: V/ V Alcohot Misc:	
Assessment	Assessment
Diagnosis or differential Diagnosis	Assessment
Plan	Plan
Tests. Use free form text to outline your treatment plan - or - use the Medication and Referral/Tests buttons. Heferals, Medications, etc.	Image: Medication Specialist Image: Medication Image: Medication Image: Medication Image: Medication
Save Wizard Clear Print SOAP Egit	X- <u>R</u> ay 😵 <u>O</u> ther

Presenting Complaint Button:

Presenting Complaint

The first item that must be entered is the presenting complaint. This should be a very short summary of the patient complaint. For example "Headache" or "Low Back Pain". The terms entered here will show up on the patient visit summary form which will be discussed later. You may type any word or phrase into this box.

Note the Presenting Complaint button? Cl	licking this	button	will	bring	up	a	"Pick
List" of commonly used presenting complain	nts.						

Presenting Complaint			
Presenting Complaint	Presenting Complaint Selection List		
Jan 23, 2007	Double Click to Select	A	N
	COMMON COLD	В	0
	HEAD ACHE	С	Р
	LOW BACK PAIN	D	Q
	NAUSEA	E	R
		F	S
		G	T
		H	U
		<u> </u>	
		J	W
		ĸ	×
		느	ľ,
		-	1-3
Search for Items that Start With C Contain the word	Save Clear		

You may type any presenting complaint you wish into the Presenting Complaint search box at the top left. As you type, the list of matches on the right will appear. If you see the word or phrase you are searching for you can stop typing, highlight the word and press <ENTER> or click on the word or phrase.

If the presenting complaint you are entering is not in the list, when you click the SAVE button, Navicert will add the presenting complaint to the pick list for the next time. In this way, the presenting complaint list will be quickly tailored to your practice. In just a few weeks you will have very little typing to do!.

Note the column of grey letters on the far right? If you quickly want to jump to the presenting complaints that start with the letter S for example you can click the S button and the Pick List will jump to that spot in the database.

At the bottom of the screen you have an option. "Start With" or "Contains the word". For example, if you select Start With and then type in the word LOW you will see LOW BACK PAIN appear on the list because Low Back Pain starts with the word LOW.

If you select "Contains the word" and then type the word ACHE you would see BACK ACHE and HEAD ACHE. In the pick list because both phrases contain the word ACHE.

Once you have selected your presenting complaint just click SAVE. While it is recommended to stick with just one presenting complaint you could press the Presenting Complaint button and add another presenting complaint if you wished.

Subjective Symptoms:



The Subjective Symptoms are the detailed description of the patient's condition as they describe it. Once again we have the Subjective Button to bring us a quick pick list of common Subject Symptoms. Navicert will first examine the Presenting

Complaint and then pick all Subjective Symptoms associated with that complaint to give you a reasonable list to select from.

Subjective Complaint			
New Subjective Complaint	Subjective Complaint Selection List		
NAUSEA	Double Click to Select	Α	N
PRESSURE OVER LEFT EYE	BLURRED VISION	B	0 P
TENSION AT THE BASE OF SKULL	NAUSEA	D	Ō
	PRESSURE OVER LEFT EYE	E	B
	PRESSURE OVER RIGHT EYE	F	S
	RINGING IN EARS	G	T
	TENSION AT THE BASE OF SKULL	н	U
			V
		J	W
		ĸ	×
		늪	<u> </u>
	×	M 0	-9
Search for Items that	Save Clear Exit		

As you add new Subjective Complaints they will be saved with the presenting complaint you entered for the next time a patient with a similar condition presents to the office. Over a short period of time your Quick Pick list will be very detailed and you will have little typing to do.

Once you click SAVE, Navicert saves the Subjective Complaints and returns to the SOAP Note form.

Objective Physical Exam Findings



Objective Physical Exam findings are the findings the doctor makes during his examination of the patient. By now you should be familiar with the quick pick lists. Clicking the Objective button will bring up the Pick List.

Double Click to Select 🔨	Α
SCULAR HYPERTONICITY	В
	С
	D
	E
	F
	G
	H
	<u> </u>
	J
	<u> </u>
	는
~	M
Q	🖌 📴 Exit

Vitals

Height: 6'2'' Weight: 175lbs	Smoking: None	Drugs: None
BP: 120 💌 / 💷 💌	Temp: 98.6 💌 Pulse 🚾 💌	Vision: 🗵 💽 / 🗵 💽
Alcohol: Social drinker	Misc:	

An important part of any physical exam is a record of the vital statistics. The patient's height, weight, BP, temperature, pulse, vision plus smoking, alcohol and drug habits are all part of a good clinical note. Navicert records these stats on the patient's chart and automatically brings them forward when you create a new SOAP note. All you need to do is record any changes.

You can record your height and weight in English or Metric systems according to your preference and training but the drop-down temperature scale is in Celsius.

Assessment

Assessment

You can type your assessment (Diagnosis) in free hand or you can click the Assessment button. If you select the Assessment button, Navicert will bring up the MSP supplied ICD9 Code list that you will have seen in the billing section of the manual. This list is reasonably complete but you can still add new diagnoses to the list. If you are adding a diagnosis you will need to have the ICD9 code. Coding manuals can be obtained from MSP.

🛤 ICD) Code Browse						
	Diagnosis	ICD					
	HEADACHE - MIGRAINE	346					
	HEADACHE - TENSION						
	HEADACHE NOT OTHERWISE SPECIFIED						
	HEARING LOSS	389					
	HEART - BLOCK	426					
	HEART FAILURE - UNDEFINED	428					
	HEATSTROKE	992					
	HEEL LACERATION	892					
	HEMANGIOMA	228					
	Search For: HEADACHE						
	Diagnosis HEADACHE - TENSION						
	Add Carro Cancel Exit						

To add a new diagnosis just click the ADD button. Fill in the diagnosis and ICD code then click the SAVE button.

Plan

Keep in mind you can type your Treatment Plan (or any of the other items described above) free hand. You do not need to use the quick pick lists if they are not applicable. You may, for example, want to monitor the condition and not offer any specific treatment. In that case it is much quicker to type "follow-up visit 2 weeks" than it would be to go through the various quick pick lists.



The treatment plan for the patient should outline any medications, recommendations, tests specialist referrals or other treatments as the physician prescribes. Navicert makes it easy to select these options. Further, Navicert will assist the physician by printing Lab Requisitions, X-Ray Requisitions, Referral slips and prescriptions.

If you are using the Wizard to construct your S.O.A.P Note you will be able to select which items you wish to use. Just click the options you wish to add to the plan and click NEXT to fill each in.

Select Plan Items	
Medication X-Ray Lab Test Plan Image: Medication Image: Medication <	

We will go over each option in detail but in reality you would rarely use all options available on one patient.

Medication

Medication

Disclaimer: The Navicert Prescription list was obtained from a variety of public domain sources. The list is very large but may not include every medication the physician wishes to use. The dosages listed for each medication may not include every dosage available for each medication and some dosages listed may not be available, applicable or even safe – physicians MUST carefully assess the dosage and medication name for accuracy. Some medications listed may no longer be available. Navicert makes no attempt to assess if the medication being prescribed is appropriate for the condition being treated. Navicert DOES NOT include any information regarding harmful drug interactions. Improper prescriptions may harm or even kill a patient. Complete Billing Systems assumes no liability for prescriptions made using the Navicert software – we are not experts in prescription medications – that is the area of expertise of the physician. It is the physicians responsibility to carefully check each prescription for accuracy – Navicert is a helpful tool but it in no way replaces the skill of a physician.

The Medication button will bring up the Medication Quick Pick list.

dd Modioption			ALABCON JBENE	This Prescription
uu Medication		A		
		B	·	
octor: 1	DR. I. M. HAPPY	C	TYLENOL CODEINE NO 2 TABLETS	
I auffan staar Niemaan	THENO	D	TYLENOL TABLETS	-
redication in ame:	TYLENUL	E	TYLENOL WITH CODEINE	
ate Prescribed:	Jan 24, 2007	F	TYLENOL WITH CODEINE NO 3 TABLET	
		G	TYLENOL WITH CODEINE NO 3 TABLETS	
ose:	300MG	H	TYLENUL WITH CUDEINE NO 4 TABLET	
ia:	1 po twice dialy PBN		TYLENUL WITH CUDEINE TABLETS	
·g.	T po twice dialy 1111	1	TYLENUL WITH CODEINE TABLETS NO 3	
isp. Number/Amt.:	30 days	K	TYLENUL WITH CUDEINE TABLETS NU 4	
- CU		- <u>-</u>		
Brills:	U	M		
harmacy Instructions:		N		
		<u>U</u>		
		P		
		4		
		n c		
		<u>э</u> т		
	Add to This	-		
	Prescription	V		
		w w		
		T Y		
		Ŷ		
 All Medicati 	ions 🛛 🔿 Most Common Medications	7		
		0-9		
		0-3	p	1
1 0		SUBSIDE	Medication Search	

As you type the name of a medication in the medication field, Navicert searches it's database and finds the best matches to display on the pick list. If you see the medication you are looking for you can stop typing and just click on it.

If you do not find the medication you are looking for just type in the name. Navicert will save it to the list for the next time.

Navicert locates all dosage information on the drug you have selected and loads it into the dose dropdown box. You can use the drop-down box to select the dosage from the available dosages listed. If the dosage you wish is not listed, just type in the dosage and Navicert will save it along with the medication information for the next usage.

The SIG portion of the prescription lists the method and frequency the medication should be taken. Click on the SIG you wish or type your own SIG into the field and let Navicert save it for next time.

Type in the Disp Number or amount (for example "300 tablets" or "1 month supply").

Enter the number of refills or enter 0 if there are to be no refills.

Enter any instructions for the pharmacy.

When you are finished, click the "Add to This Prescription" button. You can now add another medication if you wish using the above steps.

When you are finished prescribing medication click the SAVE button. Navicert will ask if you wish to print the prescription.

Note that Saskatchewan pharmacies will not accept prescriptions unless they are signed by a physician so please make sure to sign the prescription when it prints.



Specialist Referral:

Add Patient Referral			Same as
Date Booked	Saturdau Jun 23, 2007		Double Click to Select
Doctor			
Namo	Dr. ALAN W B JONES		
Addross		Browse	
CityDrev	BEGINA	C Destar	
		C Lab	
Postal Code	541 IA3	C Other	
Phone	(306) /66-/3/7 Fax (306) /66-/3/4		
Apt. Date:	Saturday Jun 23, 2007	AM	
_			
Type	ORTHOPAEDIC SURGERY		
Patient Instructions			
msuucuons	APPOINTMENT.	Add to List	
Comment			
Comment			
	Save This Referral to the Summary List		
6			C Instant Print C Lice Default Printer
Save	Elear Print E	<u>x</u> it	Preview First C Select Printer

The Referral screen was discussed in the billing section but as a reminder, you can select a physician, lab or other location (Massage, Chiropractic, Physiotherapy, etc).

Once you have completed the referral form you can click the SAVE button and Navicert ask if you wish to print the referral form.

Referral		
Appointment	Happy Medical Clinic Date Printed: Jan 24, 2007 123 Test Street hunne S4T 149 Phone: (306) 555-1212 Fax:(306) 555-2121	
Patient		
Name AL	ARCON, IRENE	
PHN ¹⁸	3%24Z3 DOB 8/1/1897	
Doctor		
Name	Dr. CHRISTOPHER E U EKONG	
Address	122, MEDICAL OFFICE WING, RGH	
City/Prov	REGINA	
Postal Code	S4P 0w5	
Phone	(306) 781-7229 Fax (306) 352-0499	
Appointmen Patient Instruction Instructions	Type NEUROLOGICAL SURGERY	
	Epint Egit	

Treatment:

The treatment button will bring up the familiar pick-list form allowing you to add any appropriate treatment. Any treatment you add will be stored along with the condition for the next time you use the system.

New Treatment to be Add	ed Treatments Selection List
BEDREST	Double Click to Select
	BEDREST
	COLD COMPRESS
	=
	M
	Save to Summary Page
tems that	

Lab Test:

Caboratory Rev	quisition	
Date:	Jan 24, 2007	Double Click To Add (Select Heading to add all Sub-Items)
Tests:	Double click to Remove Item Read Powel Units Date Date Date Date Date Date Date Date	BLUCOSE A Faring Glucose A Part PC Glucose A Hahl C Glucose A John PT Spa A MAT Spg. TAP MAT Spg. TAP MAT Spg. TAP A Mat Spg. TAP A
Special Instructions		Cestrine Lipid Penel Fasting Thyroid Screen (TSH) Thyroid Followup TSH
Instructions:	र () () ()	F14 F13 Uroe Panel T.B.B Ab Prop. ALT
Comment		🔓 Save 🔍 Dear Print Lab

Navicert will allow you to quickly fill in a lab requisition and print it. Click the Lab Test button. You will notice that lab tests are grouped together under main headings that are bold. If you double click the bold item, all indented items under that heading will be selected. You can also just select individual tests or even write in your own free-hand tests.

When you have entered any additional instructions for the lab you can click the SAVE button. Navicert will ask if you wish to print the lab requisition.

_	Laboratory F	lequisition
	Clinic Information:	Doctor Information:
	Happy Medical Clinic 122 TestSheet June 547 143 Phone (306) 555-1212 Fax(306) 555-213	DR. I. M. HAPPY 121HAPPY ROAD REGNA SK. 54542 Phone (206) 555-1212 Pax
Patient	ALARCON FIENE 2D-NER SK 505.90	Date Printed Jan 24 2007
PHIN 180362 Home: Work	RD SEICM	
lests Ord	ered	Instructions
		Comments:
		Collected By:
		Date:

X-Ray

🖻 X-Ray Requisition	n	
	Double click to Remove Item	Double Click to Select
X-Rays:	Cervical Spine	Chest
		Sinuses
		Lervical Spine
		Lumbar spine
		Shoulder (Specify)
		Elbow (Specify)
		Knee (Specify)
		Ankie (Specify)
WCB Claim #		Abdominal Series
		KUB
Pregnant?	C Yes • No C N/A	Other (Specify)
Clinical Info	Head ache for 2 daud	
onnour nito.		
	v .	×
_		
Comment:		Save Clear Print X-Ray Exit

Navicert lets you quickly select from a list of X-Ray types. If the X-Ray you are looking for isn't on the list you can type your own in.

If the patient is under WCB, it is helpful to include the WCB claim number.

For

female patients, Navicert will ask you to fill in the pregnancy portion of the form (it is generally not recommended to take X-Rays of pregnant females).

When you click SAVE Navicert will ask if you would like to print the X-Ray requisition.

Other Treatment:

If there is a type of treatment you wish to prescribe not covered by the above categories you can use this quick pick list to select it.

	New Treatment - OTHER	New Treatment - OTHER - Selection List		
CRYS	TAL HEALING	Double Click to Select	Α	N
ARON	1A THERAPY	-	B	
<u> </u>		-	D	Q
i –		-	E	R
		-	F	S
		-	H	Ū
			Ţ	V
			J K	×
			L	Y
		<mark>、</mark>	M	
		Save to Summary Page	_	
i for Items that Start With	C Contain the word	Save Clear Exit		

Completed SOAP Note:

S.O.A.P. Note	
Presenting Complaint	Summary
Complaint: HEAD ACHE	Presenting
Doctor: 1 DR. I. M. HAPPY Visit Date: Jan 24, 2007	Complaint
Subjective Symptoms, patient description, etc.	Subjective
Objective Physical Exam Findings	Objective
Height: 1.5m Weight: 75kg Smoking: none Drugs: none BP: 102 • / 33 • Temp: 55 • Pulse 120 • Vision: 56 • / 25 • Alcohol: Social Misc:	
Assessment Diagnoiston Diagnoiston Diagnoiston	Assessment
Plan Tests. Medication: A Procedures, TryLENOL 300MG, B Referrady, Specialist Referral; B Dr. CHRISTOPHER E U EKONG - NEUROLOGICAL SURGERY COLD COMPRESS, BEDREST Lab Tests Ordered;	Plan Medication Specialist Referral Image: Construction of the second sec
Save Wizard Clear Print SOAP Egit	X- <u>R</u> ay 🥸 <u>O</u> ther

When you have completed your SOAP note you can manually edit it further or click SAVE to save the record into the patient's chart.

Clinic Note:



The Clinic Note feature allows doctors to enter notes in a less structured format. It is ideal for touch typists who find little need for Pick Lists. It is also ideal for people using Dragon Medical Dictation software.

As with the S.O.A.P. note you need to enter the patient's presenting Complaint at the top. You can use the Presenting Complaint button to bring up a pick list.

🖪, Clinical No	te	
Patient		Summary
Name:	ADAMS, WENDY PHN: 1	401 44269
Sex:	F DOB: Jan 01, 1963 AGE: 4	4 Patient
 Presenting Co 	mplaint	Summary
Complaint:	Low Back Pain	Presenting
Doctor:	DR. W. S. ELLIOTT	Visit Date: jan 10 2007
11-Sector	Et10" Visible 125ba Cashing News	Printing
BP.	110 ▼ / 72 ▼ Temp: 98.6 ▼ Pulse	Print Clinic Note
Alcohol:	Social Drinker Misc:	vision: jui, jui
Clinical Note		
	Use CBS Word EMR I Emplate: Sample Form	Processor
		Clear
		Medication
		X- <u>H</u> ay
		Specialist Beferral
		<u>Save</u>
		Exit

The Clinic Note goes in the large box. At any point you can bring up a pick-list for lab tests, X-Ray, referral, medication or any other Pick List shown down the right hand side of the screen.

The Clinic Note function is idea for touch typists who can very quickly fill in detailed reports. It is also ideal for people who use Dragon Voice dictation.

If you wish you can select the "Use CBS Word EMR" check box. When you do this you will be able to use the built in word processor that comes with CBS EMR. Using the built in Word processor offers the advantage of access to the spell check and macro functions. In addition if you have created a template in the Word Processing tab it will appear in the Template drop down. You can select any template you wish prior to clicking the Word Processor button and Navicert will use the selected template to help create the clinic note.

Once you have completed your clinical note, click the Save button.

Templates

The SOAP format is great for most patient notes but there are cases where you may wish to enter notes in a very specific format. For example, you could create a template to record notes on patients with diabetes or heart disease in a specific format. You may have specific information you wish to record on new patients and this information may follow a specific format. Templates must first be designed but once they have been created they can be used to easily and rapidly enter patient notes.

Creating Templates

To create a new template, first select the Create Template toolbar item or click FILE then Create Template.

🏈 CB	S Navicert EMR v1.45 Sit	e
Eile		
	Billing	
ŶŶ	Select Create Patient Template	'n

You will then see the Template creation screen.

EMR Template			
		EMR Templates	
Template Name:		Template Names.	0
Template Number:			=
P			_
Question:		Question	*
Question Number:			=
_			=
			-
Possible Answer:		Antiwers	^
Answer Number:			=
			_
			~
	Template Question Answer	Contraction Constant East	

Templates consist of three basic parts:

• The template name – used to select the proper template. For example you might use Initial Visit or Diabetes Follow up as template names.

- Questions Questions are the main points the doctor wishes to cover with the patient. They can be
 actual questions that the doctor asks the patient such as "When did you first notice the problem".
 Questions can also be questions the doctor wishes to answer such as "Does the patient appear
 agitated?". Questions can also be headings on a form that the doctor wishes to fill in such as "Blood
 Pressure".
- Answers These are possible responses to the question. By putting in the most likely response you will save a great deal of time later when you are filling in the template. Answers are attached to the specific question selected.

We will go through the steps involved in creating a very basic template called "Warts". This example is intended to show the basic steps however you will almost certainly not use our template in your practice without significant modification.

Template Creation Continued...

Step 1 is to click in the New Template button. Now type the template name Warts.

Step 2 is to enter a series of questions. Let's start with Location. Click the New Question button and type in the word Location.

Step 3 is to enter a series of possible answers.

- Click the New Answer button and type in Hand.
- Click the New Answer button and type in Foot
- Click the New Answer button and type in Arm

You can now enter more questions and more answers. For example Size. Go to step 2, click on New Question then type in Size. Now click New Answer and enter "Less than 1cm". Click New Answer and type in "1 - 2 cm" and finally click New Answer and type in "Greater than 2cm".

In this way you can continue to add as many questions and possible answers to your template as you like. It should be noted that you may not be able to anticipate every possible answer when you are building your template. Don't worry. You can always add additional answers later when you are actually filling in your patient notes.



You can modify any question you wish by just clicking on it in the yellow grid at the right side of the page. Once you have selected it you can change the question by clicking in the cyan box on the left side of the screen and making the change there. Likewise you can modify any answer in the same way.

You can use the Delete Answer button to remove a single answer. You can use Delete Question to remove an entire question and all answers attached to it. Finally you can use the Delete Template button to remove the entire template, all associated Questions and all associated Answers.

New Template Note

🏈 CB	S Navic	ert EMR v	1.45 \$	iite #3	67 TERA	49
Eile						
		Billing				
ŶŶ	Select Patient	<u>ل</u> ا	Create Implate	à	New Template Note	è

To add a note to the patient's chart using one of your pre-made templates just click the tool bar item that says "New Template Note".

You will see:

🖨 Template	í									
Patient Name:	AADLA	AND, DONNA		PHN:	230112900		DOB:	Aug 28, 1950	Sex:	F
Presenting Co Complaint: Doctor:	omplaint	NOT USED		•	Visit Date:	Feb 22, 2007		Presenting Complaint	Selected Tem	plate:
								Click a	Template to E	Begin
							1	2	Template Names:	^
							2	Warts		
							8	8		
							2			
							8	8		
							2	8		
								<u> </u>		
								<u></u>		
<u> </u>										
								2		
								2		~
Lie	eatment	Specialist <u>R</u> eferral	<u>O</u> ther X-	Bay	Lab Test	Meds	Prin Clin Not	nt ic e	Save	Exit

The first step is to enter a presenting complaint. You can type in a presenting complaint in the Complaint field or you can use the Presenting Complaint button to bring up a list of presenting complaints to select from.

Once you have entered a presenting complaint you are ready to select a template. All templates are displayed in the grid at the right. Just click on the template you wish to use.

Once you have selected a template the questions will fill in along the left hand side of

the screen.

To fill in the form just Click in the cyan box to the right of a question. As you do this your previously entered answers will be displayed in the yellow grid. You can select any of these answers by clicking on them or you can type in your own answer.

If there are more than 10 questions you will see Previous Page and Next Page displayed at the bottom of the template. Use these buttons to move back and forth through the questions.

Ireatment Specialist 😵 Other	X-Ray	Print Clinic Note	Save Exit

Along the bottom of the screen are a number of buttons which can be used to bring up the forms for various items such as Treatments, Referrals, X-Ray, Labs and Prescriptions.

When you are finished filling in the template just click SAVE and the information will be stored in the patient's file.

Recent Visits

Patient	ALA	RCON, IRENE			PHN: 16036	242	23	DOB:	Aug 01, 1897	Last Visit: Jan 23	1 <mark>, 2007</mark>	
Height.	1.6m	Weight 75k	g B.P. 12	0/80	Age: 109	Sea	*: <mark>M</mark>	Pulse	120	Next Visit:		
Current Summ	ary 丫	Past Summary	Additional Inf	0 Ĭ	Patient Notes	ľ	Recent V	visits	Labs	Scans	Faxes	Misc.
 Presenting Co Complaint: Subjective Symptoms, patient description. Objective Physical Exam Findings 	MUS	D ACHE SEA PRESSUR	E OVER LEF	T EYE,	TENSION A	л ті	HE BASE	OFSK	ULL	Doctor: 1	Visit Date: J Previous Height: 1.6m Weight: 75kg B.P.: 120/8	an 24, 2007
Alcohol:	Socia	1	Smo	oking: n	none			D	ugs: none		Temp: 37 Pulse: 120	Edit Visit
Misc:	<u> </u>			21					- ,		Vision: 20/20	
Assessment Diagnosis or differential Diagnosis	HEA	DACHE - TENSI	DN									~
Plan Tests, Procedures, Referrals, Medications, etc.	Med TYLE Spec Dr. C	ication: ENOL 300MG, cialist Referral: HRISTOPHER E	U EKONG - M	IEURC	DLOGICAL S	UR	GERY					

After creating your clinical notes you can view them any time. Navicert actually defaults to this screen to display the most recent clinical note when you click on the Electronic Medical Records tab.

You can browse through patient records one at a time by clicking the Previous and Next buttons. You can click the Last Visit button any time to return to the most recent visit.

If you wish to update a record you can click the Edit Visit button.

Patient Notes:

Current Summary	Past Summary	Additional Info	Patient Notes	Recen	t Visits	Labs	Scans	Fa	ixes	Misc.
			_				•			
			Patient Notes							
Visit Date	Complain	ł	Assessment (Diagno	sis)		Treatme	nt Plan	~	2000	
Jan 24, 2007	HEAD ACHE	HEAD	ACHE - TENSION		Medication	n:				SUAP Note
								_		
								_		Clinic Note
	-							_	<u>•</u> =	
								_	2 pr	
									×.	Edit Note
								~		Delete
								_		
									II.	
										Print Notes
								_		
								_		
								_		
								_		
								_		
								_		
								~		

You can quickly see an overview of all patient visits by clicking the Patient Notes tab. There you will see the date, complaint, assessment and the first few lines of the treatment plan. You can double click any visit to see the full visit details.

You can also create a new SOAP Note or Clinic Note by clicking on the button at the right hand side.

urrent Summa	y Past Summary	Additional Info	Patient No	tes Recent Visits	Labs		Scans		Faxes	Misc.
	Current Problems				Current Medica	ation				
Date	Descriptio	n	Date	Medication	n 🗌	Dose	Disp.	Refills		Sig.
Jan 24, 2007	HEAD ACHE		Jan 24, 2007	TYLENOL		300MG	30 days	0	1 po twice dialy F	BN
			L							
New	Edit Delete	Past		New Edit	Delete	Refi		Print	Past]
	Current Treatments			R	ecent Referrals				R	lemarks
Date	Descriptio	n 🔥	Date	Туре	C	octor, Lab	or Facility		^	
Jan 24, 2007	COLD COMPRESS		Jan 24, 2007	NEUROLOGICAL SURGE	RY Dr. CHRIST	OPHER E	U EKONG			
Jan 24, 2007	BEDREST		L						≡ .	
		~							~	
Now	Edit Delete	Paet		New	Edit Dele	to				
HUH	L'ait D'élèté	1 0 00		Item	Dele					Jave

Current Summary:

The Current Summary tab gives you a quick review of the patient's current problem, current medications, current treatments and any pending medical referrals. When a medication expires or a treatment is no longer current you can click the "Past" button. This will move the item from the current summary area into the Past Summary area. You can add to, edit or delete any of these items by clicking the appropriate button.

Past Summary



The past summary area outlines previous problems, medications, treatments and referrals.

You can renew a past medication by clicking the "Refill" button.

Additional Info



The Additional Info form allows you to track allergies, family history and social history, immunizations.

Labs

Current Summary	Past Summary A	dditional Info 👔 Patie	ent Notes	Recent Visits	:	Labs	2	Scans	Fax	BS	N N	disc.
Visit Date Jan 24, 2007	Test Renal Panel	Result	Ad	d New Lab	Ac	ld to Existi Bea	ing	Delet	e All Tests This Date	X	Del	lete ed Test
Jan 21, 2007	Electrolytes							<u> </u>				
	Urea	10										
	Creatinine	.6	Lirea		Creatinine		-					
			1		1 1					1		
			10T			· · · · · · · · · · · · · · · · · · ·	.1	[11		1	1
			1									
			J	7			1				1	
			8									
			1									
			7-									
			+									
			6-					•••				•
			1									
			5-	• • • • • • • • • • • • • • • • • • • •	••••							•
			1,									
			*I				1				1	
			3									
			1									
			2-									
			+									
			1-									•
			+			•						
			04									-
			1	2	3	4	5	ь	/ 5		э	10

Lab results are displayed on this screen. The first column shows the date of the lab test. The next column shows all tests on that date.

As you click on each date you will see the lab tests on that date.

At the moment it is necessary to enter lab values manually. In the near future we expect to be able to interface electronically and pick up lab results over the internet.

You can quickly graph lab results. Just click one of the drop-down boxes to select the lab result you wish to graph. You can select up to 4 independent lab values to graph however be aware that lab values with widely different scales can distort the graphed results.

You can also add new lab requisitions from this page, add to a requisition, delete and edit tests.

Scans

Patient: AADLAND, D	PONNA	HN: 230112900	DOB: Aug 28, 1950	Last Visit: Feb 22	2, 2007	2
Height Weigh	ht B.P. A	ge: <mark>56</mark> Sex F	Pulse:	Next Visit		YD.
Current Summary Past Sum	nmary Additional Info P	atient Notes Recent V	isits Labs	Scans	Faxes	Misc.
Document Date Date Scanned Nov 16, 2005 Nov	Flename 2011200_00053.PG 2011200_00054.PG	Description Sample 2	Scarned Do	<section-header><section-header><section-header><text><text><text><text><text></text></text></text></text></text></section-header></section-header></section-header>	<image/> <image/> <image/> <text><text><text><text><text><text></text></text></text></text></text></text>	Print

The scans tab is used to store and view scans on the patient's chart.

In order to scan a document, for example, a letter that you have received in the mail, you will need a scanner. Scanners come in many types but fortunately there is a standard way for scanners to communicate with PC's. The scanner manufacturer will small interface supply а program which Navicert will use.

From the drop down menu, select your scanner. Load your document in the scanner and click the Scan Document button. Navicert will start the scanner interface. Each scanner comes with it's own interface software so it's impossible to say exactly what you will see. In general you will be able to select color or black & white, point size or DPI and a number of other features. One constant is that there will be a Start Scan button or some similar button that starts the scan process. Once it is complete, Navicert will display the picture. When you confirm that you wish to save the picture, Navicert will bring up the date and ask for a brief description of the document. Once this information is provided, the scan will be attached to the patient's file.

You should be aware that anything you scan is stored as a picture, even if it is a picture of a letter. You can not edit the document the way you can edit a word processing file. Likewise there is no way to search the file for words or phrases. Some customers have suggested scanning old charts into Navicert. While this does do away with paper and some storage issues it really isn't the best way to maintain a computerized patient record. Scans should be used to store the occasional correspondence or report.

While you can't edit the document you can edit the description of the document to make it easier to find. Just click the Edit Document button.

You can view your document on the screen but it is a bit small and it could be hard to read. You can click the Full Screen button to view the entire document or you can click the Zoom In and Zoom Out button to look at parts of the document. When you are zoomed in you can scroll around the picture. Just click the picture and while holding your mouse down move the mouse and drag the picture around.

You can print the document back out if you need to. Just click the Print button.

Import Scans



The Import Scans button allows you to attach a large number of previously scanned documents to a patient's chart.

🖣 Import Scans	
Import Scans Nov 10, 2005 06:13 PM background bmp Nov 10, 2005 09:03 AM PUPPY_RESCUE_PAGE_1GIF Nov 10, 2005 09:03 AM PUPPY_RESCUE_PAGE_2GIF Sep 05, 2002 06:26 PM SigNATURE_BMP Import Scans Import Scans Import Scans Import Scans Import Scans Import Scans Import Scans Import Scans Import Scans Import Scans Import Scans Import Scans Import Scans Import Scans Import Scans Import Scans Import Scans Import Scans Import Scans Import Scans Import Scans Import Scans Import Sca	Image: Select Controls UE Image: Select Controls
b) 1% to leader the maximum of the second s	And the distance ways, the fast way and the second

The first step is to select the folder to import from. Just click the Change Folder button, browse your hard drive and locate the folder you wish to import from.

You can now view the documents by scrolling up and down through them on grid on the left hand side.

Along the right hand side of the screen you will see a number of buttons. You can Zoom In or Zoom Out. When Zoomed In you can scroll around the picture by clicking on the picture and moving your mouse. You can also click Full Screen to view the entire document and you can Print the document out if you wish.

Once you have selected the document you wish to add you can select the desired patient by clicking the Select Patient button.

Navicert will take a copy of the document and store it in a shared folder so all computers on the network can access it. But what to do with the original file? You can leave it untouched or you can delete it once the copy has been made. If you wish to delete the document just check the Delete Scan After Adding To Chart option box.

When you are ready just click the Add Scan To Chart button.

Faxes

Patient 🖡	ADLAND, E	ONNA	\	PHN: 2301	129	00	DOB:	Aug	28, 1950	Last Visit: Feb	22, 2007		
Height:	Weig	nt 📃	B.P.	Age: 56	S	ex F	Pulse:			Next Visit:		N.	YD
Current Summar	y Past Sum	mary 🎽	Additional Info	Patient Note:	s	Recent Vi	isits		Labs	Scans	Faxes	M	lisc.
Document Date Nov 16, 2005	Date Scanned Nev 15, 2005		Filename 000_000055.TIF	Sample f	ite	Description	Edit		Peceived Fr	At the Praise Whether the Att	FUPPY ISSUE The The The The The The The The The The	The second secon	Pint

Navicert comes with a separate program discussed later in this manual which can receive faxes directly to your computer. That program can be used to attach faxes directly to the patient chart. This is by far the more preferable way of dealing with faxes.

Some customers wish to receive faxes the old fashioned way – on a fax machine. In these cases you will want to be able to store the fax in the patient's chart.

Navicert allows you to scan a received fax into your computer through your scanner. Other than the change in tab heading (Faxes) everything on this tab is identical to the Scans tab so we won't bother going over it all again. Just be aware that you can view and print any documents stored in this area and you can import faxes stored in a hard drive folder using the Import Faxes button at the top of the screen.

Misc Documents

This feature is very similar to the Scans and Faxes tab. You can view either scans or faxes in the exact same way as described previously. In addition you can view Microsoft Word compatible documents produced with a word processor. Navicert's Word processing program is Microsoft Word compatible so you can also store Navicert produced documents in this tab although it probably makes more sense to store them in the word processing tab.



If you have a number of old reports that you wish to organize and store in Navicert you can do so with the Import Misc. Document button at the top of the screen. It operates in exactly the same way as the Import Fax or Import Scan button works with the

exception that it is able to view and import Microsoft Word documents as well as almost any type of picture or scan.

Other Formats:



You can also import DICOM medical images such as retinal scans, diagnostic X-Ray or ultrasound. Navicert also allows you to import the popular Adobe PDF file format. These Misc. documents are stored in the patient's chart under the Misc. tab.

Section IV

Word Processing

Billion		Appointments	Electron	ic Medical Becords	Wor	d Processing	Υ	Itilities	
Select New Document	Existing Document	Review Documents					1		1
	Patient: AAD Category: Pati	DLAND, DONNA	•	PHN: 230112900 Template: Blank Docur	nent 🔽	Templates	Edit Template	Delete Template	New Catego
	Date	Path	File Name	Description	ı	Reviewed	Sent 🔨	Document	
							Doc	cument Viewing Control	

Most customers will already have a word processor but don't be too quick to dismiss using the Navicert EMR Word Processor. There are a number of features you will want to examine:

- Navicert comes with a 120,000 word medical dictionary
- Navicert produces Microsoft Word compatible .DOC files
- Navicert allows you to use templates
- Navicert organizes your documents and stores letters in the patient's file.

Let's get started with a simple example of a basic letter to a patient:



First, click Select Patient and identify a patient in your system you wish to create a document for. Next click New Document.

Navicert will ask for a document description then it will launch the Navicert EMR Word Processor. If you are familiar with Microsoft Word, Works, Word Perfect or any other word processor you should have no problems with the Navicert EMR Word Processor.

Word Processing Continued...



File Menu



Close – Closes the current document and discards any changes you have made.

Save – Saves the document.

Spell Check – checks the current document for spelling errors. Navicert also has background spell checking. As you type your document Navicert will check your typing and underline misspelled words in red. You can right click on the word to bring up a list of possible corrections.

Export – allows you to save the document in .PDF format. PDF is a compact file format created by Adobe to allow users to easily exchange documents or manuals in read-only format.

Page Setup – allows you to set the margins and page size.

Print Preview - allows you to view how your document will look before you print it.

Print... - allows you to print the document

S Word EMR Version - [C:\PR Edit View Insert Format Ta Undo insert text Ctrl+Z Nothing to redo п Cut Copy Paste Ctrl+V Macro Delete Del Ctrl+A Select All Find.... Ctrl+F Rep<u>l</u>ace.. Chrl+H

Edit Menu

Undo/Redo – used to reverse changes made while editing. Cut – Removes highlighted text Copy – Places a copy of highlighted text onto the "clipboard" Paste – Places the contents of the clipboard into the document Delete – Deletes selected text Select All – Selects all text in a document Find – Searches the document for text Replace – Goes through the document and replaces selected text with new text.

Macro

The Macro feature really extends the power of Navicert Word EMR. With a few keystrokes you can instantly insert words or phrases. We will take the simple example of inserting the phrase "Thank you for asking me to see this patient."

First type the phrase. Next, highlight the text using your mouse. Finally you need to bring up the macro menu. Click on Edit then click on Maco. Alternately you can right click on the selected text then click Add Macro.

nsert Macro	
-1-2	The second birth
CDZ	Cleast were bright
fhm	Criest study is totally normal!
	This is injulately bold type indeto.
108	
- ·	
Search:	Code: 🕅
Thank you for a	sking me to see this nationt
Thank you for c	Sking no to see this patient.
	Update
	Delete
	Delete
	Exit
Ľ	

You will see a spot on the screen marked Code. Just fill in a short code phrase that you will use to insert your macro phrase. We will use "ty" to stand for our phrase. Now click the SAVE button and our macro will be added to the database.

Next time you wish to use the phrase "Thank you for asking me to see this patient." All you do is type ty and then press the space bar. The program will instantly change ty into our macro phrase.

Obviously you would never want to use a Code that is actually a common word. For example we wouldn't want to use the code "Thank". If we did, every time we typed Thank the system would convert it into our macro phrase.

You can bring up the macro screen any time by clicking on the Edit menu or by right clicking on a highlighted word or phrase then selecting Add Macro.

View Menu:



Normal – resets the document to default view mode.

Page Layout / Centered Page Layout – Sets the screen to show the document as it will print on your printer displaying as much of the document on the screen as possible.

Headers and Footers – Sets the text to appear at the top or bottom of the page in the header or footer area.

Tool Bar – Displays or hides the program tool bar.

Paragraph Bar – Displays the font / point size, Bold, Italic, Centering and other paragraph options.

Control Characters – Displays spaces, end of lines and paragraphs characters.

Zoom – Sets the size of displayed text. 100% will display the text full sized.

Headers & Footers:

Headers and Footers are sections of text that are automatically inserted at the top and bottom of each page you type. To enable Headers you must first check Page Layout or Centered Page Layout in the View menu – Headers and Footers are disabled unless you are in Page Layout mode. After enabling page layout mode you must Headers and Footers in the View menu to enable the Headers/Footers toolbar items.

Once you have enabled Headers/Footers just double click at the very top of the page or at the very bottom of the page. You will see a box appear. Type your header/footer in this area.



When you enable Headers and Footers are enabled you will see four toolbar items enabled. They appear as green blocks just above the point size selector. The first item allows you to display Header/Footer properties. Click this item and you will see the header/footer properties box.

First Page Different Option

Notice the "First Page Different" Check Box at the bottom of this box. This option allows you to set a different Header or Footer for the first page. If you leave the first page header/footer blank then the first page will have no header/footer. This may be the best option for clinics using letter head.

Headers and Footers Prope	💶 🗖 🔀		
Distance from page border	OK		
Header 10 • mm Footer 10 • mm	Cancel		
🔽 First page different			

The second green header/footer toolbar item switches between header and footer. The Third and Fourth header toolbar items are active only if you have selected the "First Page Different" option described above. They switch between the First Page header/footer and the default header/footer.

Insert Menu



Text – Inserts a text file that you have previously typed. Image – Inserts a picture or image. Most common graphic formats are supported. Object – Allows you to insert a wide range of file types including spread sheets, video clips and even music files. Text Frame – Inserts a box that holds text. Page Break – Starts a new page

Envelope

Envelope Printing		
Happy Medical Clinic 123 Test St. Saskatoon, Sk S4V 2J9 I Pint Return Address		
	Printer Setup	Print Exit

Allows you to print an Envelope to your printer. Before you print the Envelope click the Printer Setup Screen and make sure your alignment and paper bin options are set properly.

Once that's done all you need to do is insert your address and click the Print button.

Format Menu

on - [C:VPROGRAM FILESVNA'	Character/Paragraph - Allows you to set the font and point size of selected text.
Character Paragraph T <u>a</u> bs	Tabs – Sets or deletes tab spacing in your document. Bullets and Numbering – Sets "bullets" (little round dots) or line numbers in front of lists.
Bullets and Numbering Styles Image OLE Object	Styles – Allows you to create or select a previously created style. Image – If you have selected an image you can set a number of options especially how text will wrap around your image
Te <u>x</u> t Frame ✓ Text Frame <u>M</u> arker Lines	video clip, etc).
Paragraph <u>F</u> rames <u>T</u> ext Color <u>B</u> ackground Color	Text Frame – Sets how text will wrap around your Text Frame. Paragraph Frames – Allows you to set the distance between text and the paragraph frame for the currently selected paragraph(s).

Text Color – Sets the color of selected text. Obviously only works with color printers. Background Color – Sets the background color of the page.

Table

PR	DGR	AM FILI	S₩.		
Ta	ble	Options	Win		
	Inse	ert			
	Delete 🕨 🕨				
	Splįt				
	<u>S</u> ele	ect	⇒Ē		
✓ <u>G</u> rid Lines					
	Prop	perties			

Insert – Inserts a table into your document. You must select the number of rows and columns.

Delete – Allows you to delete a row, column or the entire table.

Split – Allows you to break up your table and split it into two parts.

Select – Allows you to select a row, a column or the entire table.

Grid Lines – Display or Hide the grid lines that make up your table.

Properties – Sets many properties of your table including frame options, colors, size and formatting.

Options

AM FILESVNAVICERTVE

Options	Window	Help	
<u>H</u> TML.			
<u>P</u> DF			
Select Printers			
Set <u>D</u> ata Paths			
Set Signature Lines			
Set St	udy Types		

HTML – Allows you to write simple web pages.

PDF – Allows you to save your document in Adobe Portable Document Format Select Printers – Set the default printer and fax printer.

Set Data Paths - Sets the location where your CBS Data files are located.

Set Signature Lines – Sets the location of your Signature files

Set Study Types – Used to set the various X-Ray Study types used by some X-Ray clinics.

Window



When you have multiple documents open at the same time you can organize the documents in a number of ways. Note that for simplicity of operation we suggest you do not open multiple documents at once.

Cascade - Lays each window on top of the next.

Horizontal - Lays each document one beside the next

Vertical – Lays each document on above the next.

Arange Icons - Lines up small thumb nail pictures of each open document.

Word Processing Templates

We have seen how easy it is to make a blank document and attach it to a patient's chart. Now we are going to make our lives even easier – with Templates!

Let's look at a simple example. We want to select a patient and then start a report to his referring doctor.



We will start by clicking the New Template button.

Navicert will ask for a description of the template:

Navicert	×
Enter Description for this Template (ie Referral Letter)	OK Cancel
Referral Letter	

After that we type up the body of our letter. The only major difference is that we are able to use Fields. Fields are just bits of text that will be replaced with data from the database when we get around to actually writing a letter. Navicert knows to watch for certain fields and can fill them in – but only if we use fields that Navicert is looking for. To help Navicert, we surround each field with the < and > characters.

Valid Fields are:

<name></name>	Patient's Name	John B. Smith		
<last_name></last_name>	Patient's Last Name	Smith		
<first_name></first_name>	Patient's First Name	John B.		
<phn></phn>	Personal Health Number	908711123		
<sex></sex>	Patient's gender	М		
<dob></dob>	Patient's Date of Birth	Jan 12, 1965		
<address>, <address2></address2></address>	Patient's Address	67 Livingstone Drive		
<city_prov></city_prov>	Patient's City and Province	Regina, SK.		
<postal></postal>	Patient's Postal Code	S4V 2J9		
<clinic_phone></clinic_phone>	Clinic Phone Number	(306) 555-1212		
<clinic_fax></clinic_fax>	Clinic Fax Number	(306) 555-2121		
<treat_doc></treat_doc>	Attending doctor	Dr. I. M. Healthy		
<ref_name></ref_name>	Referring Doctor's Name	Dr. J Brown		
<ref_address></ref_address>	Referring Doctor's Address1 Field	#201 – 12 th St. E.		
<ref_address2></ref_address2>	Referring Doctor's Address2 field	#201 – 12 th St. E.		
<ref_city></ref_city>	Referring Doctor's City	Saskatoon		
<ref_postal></ref_postal>	Referring Doctor's Postal Code	Smith John B. 908711123 M Jan 12, 1965 67 Livingstone Drive Regina, SK. S4V 2J9 (306) 555-1212 (306) 555-2121 Dr. J. M. Healthy Dr. J. Brown #201 – 12th St. E. #201 – 12th St. E. Saskatoon S0J 3P0 (306) 555-2121 Mar 4, 2007 Mar 4, 2007 Mar 4, 2007 Mar 9, 2007 Tuesday Mar. 14, 2007 Happy Medical clinic 61 Happy Patient Lane Moose Jaw, SK.		
<ref_phone></ref_phone>	Referring Doctor Phone Number	(306) 555-1212		
<ref_fax></ref_fax>	Referring Doctor FAX Number	(306) 555-2121		
<date></date>	Today's Date	Mar 4, 2007		
<apt_date> (See note below)</apt_date>	Currently selected appointment date	Mar 4, 2007		
<last_apt></last_apt>	Last appointment prior to today.	Mar 1, 2007		
<next_apt></next_apt>	Next appointment after today.	Mar 9, 2007		
<long_date></long_date>	Today's date in long format	Tuesday Mar. 14, 2007		
<clinic_name></clinic_name>	Clinic Name	Happy Medical clinic		
<clinic_address></clinic_address>	Clinic Address	61 Happy Patient Lane		
<clinic_city></clinic_city>	Clinic City	Moose Jaw, SK.		

<clinic_postal></clinic_postal>	Clinic Postal Code	S0J 3P3
<clinic_phone></clinic_phone>	Clinic Phone Number	(306) 555-1212
<clinic_fax></clinic_fax>	Clinic Fax Number	(306) 555-2121
<age></age>	Inserts patient's current Age	38
<chart></chart>	Inserts the patient's Chart Number	1138
<field></field>	Inserts an empty field. Use function key F11 to jump between fields.	BP: <field> Temp: <field></field></field>
<fam_name></fam_name>	Family Doctor's Name	Dr. J Brown
<fam_address></fam_address>	Family Doctor's Address1 field	#201 – 12 th St. E.
<fam_address2></fam_address2>	Family Doctor's Address2 field	#201 – 12 th St. E.
<fam_city></fam_city>	Family Doctor's City	Saskatoon
<fam_postal></fam_postal>	Family Doctor's Postal Code	SOJ 3PO
<fam_phone></fam_phone>	Family Doctor Phone Number	(306) 555-1212
<fam_fax></fam_fax>	Family Doctor FAX Number	(306) 555-2121
<spec_name></spec_name>	Specialist Doctor's Name	Dr. J Brown
<spec_address></spec_address>	Specialist Doctor's Address1 Field	#201 – 12 th St. E.
<spec_address2></spec_address2>	Specialist Doctor's Address2 Field	#201 – 12 th St. E.
<spec_city></spec_city>	Specialist Doctor's City	Saskatoon
<spec_postal></spec_postal>	Specialist Doctor's Postal Code	SOJ 3PO
<spec_phone></spec_phone>	Specialist Doctor Phone Number	(306) 555-1212
<spec_fax></spec_fax>	Specialist Doctor FAX Number	(306) 555-2121

Note: The field <APT_DATE> needs a bit more explanation. To use this field, the staff will open the Appointment tab and locate the patient's appointment. Next the staff will open the Word Processing tab and type a letter based on the selected template. The system will search the most recently opened appointment date. If the patient has an appointment on the selected appointment date the system will insert it. If the patient does NOT have an appointment on the selected date the system will use the last appointment date prior to the current date.

You can also use the <LAST_APT> or <NEXT_APT> fields.

Making a Template:

We are now ready to type up our template. Let's start with letterhead. We will put our clinic name in nice large bold and Italic letters::

Now add the address in a smaller font:

<CLINIC_ADDRESS> <CLINIC_CITY> <CLINIC_POSTAL> Phone: <CLINIC_PHONE> Fax <CLINIC_FAX>

Notice how we mixed fields and text? We put the word "Phone" then followed it with the field <CLINIC_PHONE>. The system will leave the word Phone alone but will replace <CLINIC_PHONE> with the clinic's actual Phone Number when the template is used.

Now we want the Referring Doctor information so it's back to regular font size:

<REF_NAME> <REF_ADDRESS> <REF_CITY> <REF_POSTAL>

Let's now add the date:

<DATE>

Almost ready. Now for a bit of patient info:

Dear Dr. <REF_NAME>: Re: <NAME> Visit Date: <LAST_APT> PHN: <PHN> DOB: <DOB>



All set. Now our template is finished. Click File and Save. Now that we have finished our template, it's a snap to use. Just select a patient then select our template from the pull-down menu. Finally click the New Document button. When we do that, Navicert will create our document and fill in the fields from the database saving us a lot of time.

Working With Fields

Sometimes field names are a bit hard to remember and if you don't get the right field name then the field just won't work at all. To aid you when working with fields in a template there is a special menu called **Template**. You will only see it when you are making a new template.

Using the Template menu you can quickly insert the field you wish. Template categories are Clinic Information, Dates, Patient Demographics and Referring Doctor.

🚔 CBS	Word	i emr	Versi	on - [C:	PROG	RAM FILE	SVNAVICE	RT\EXTI)0CS\;	2007\MAY\TEM	PLATE
🔂 File	Edit	View	Insert	: Format	Table	Options	Template	Window	Help		
🗅 💕		6	ð X	h (l In	ା 💝 🕯	Select B	Base Templ	ate	1	
[Normal]				✓ Arial			Clinic Ir	nformation	•	UT	ΞI
			_	_			Dates		<u> </u>		_
L				1.			Demogr	raphics	×	Patient Name	12
_				_			Ref. Do	octor	Þ	Last Name	
										First Name	- 11
										PHN	- 11
										Sex	
										DOB	
										Address	
										Address2	
										City/Prov	
										Postal	
										Age	
										Chart	
										Treating Doctor	

Selecting a Base Template

Sometimes you will have a template already created but you will want to make a few modifications. For that we use the Edit Template button. But what if you want to take an existing template, make a few changes then keep both the old template and the newly modified template? For this function we use Select Base Template. It's a menu item under the Template menu seen above.

🗟 Select Ba	ase Template	
		1
Category:	Patient Report 💽	
Template:	Blank Document 🔹	
	Select Template	

Pick your base template then make as many changes are you like. The original template is safe and sound and you are left with a brand new template.

The Blank <FIELD>

There's one special field – the Blank Field. Inside your template just type the word <FIELD> and press the SPACE bar. This blank field doesn't connect to any data in your database. It acts as a holding spot for later. When you are using the template to create a document you can press the F11 key to quickly jump from <field> to <field>. The <field> will be highlighted so any text you type will replace the blank field. This is a great way to fill in a form quickly. While you are working in the document you can press F11 and the system will highlight blank fields and even fields you have already filled in. Once you save your document, the filled in fields will become regular text.

Section V

Utilities Tab



The Utilities tab allows you

to access a number of features.

Address Labels

🖣 Address Labe	ls 🔲 🗖 🗖
Name	
Address1	
Address2	
City	
Province	Postal
Phone	Fax
E-Mail	
Remarks	
Remarks	
	Address Database C Referring Doctor Database
Labels to 1	<u>Save</u> <u>C</u> lear <u>Look Up</u> <u>Print</u> <u>D</u> elete E <u>x</u> it

The address label database lets you enter commonly used address information for later review or to print address labels.

To add a new item just fill in the blanks and click SAVE. If you have started filling in the information and find that you wish to start over click the CLEAR button.

If you want to find a contact that you have previously entered into the system just fill in the Name field then click on Look Up. Navicert will display a list of matching entries which you may select from.

Once you have selected an address from your database you may click the DELETE button if you wish to delete the record.

The PRINT button prints the label that's displayed on the screen. Note the Labels to Print box at the bottom of the screen. You may enter a number in this box to select the number of labels to print.

Backup / Restore

Navicert supports CD or DVD backup.

Preparation:

- If you are running a network, make sure all other terminals have exited from all Navicert programs.
- Make sure your terminal has exited out of the ٠ appointment program and is only running the CBS Navicert Billing software
- Insert your CDR or CDRW into the drive wait for any windows that your operating system may open and close them.

Starting the Backup:

- Backup Size: 0.00 / 0.00MB Progress: Click on Utilities and on Backup then on CD ROM Backup – OR – Click the CD Burner Icon on your CBS Navicert toolbar (far right side).
- Select Quick for a quick backup of the most essential database files. Click Full for a complete • backup of the whole Navicert folder. You can also select or remove files as you wish and save a **Custom** set of backup files but this is usually not necessary.
- Click the Burn button and wait for Navicert to finish the backup and eject your disc. •

General Notes:

•

- Make sure you have at LEAST three backups although one backup for each day of the week is • better.
- Rotate your backup discs. Never use the same backup twice in a row. This insures multiple • backups and provides optimum protection in the event of a crash or data loss.
- Replace your CDR's when they are full and replace CDRW's at least every 6 months. •
- Unlike Diskette backup, CDRW's do not have to be formatted before the first usage. •

Most Important Note:

Make a backup every day you use your billing or appointment system. Backups must be made at regular intervals and must be current or they are useless. Follow this advice and there are very few situations that you can't recover from. Ignore it at your peril.


CBS Navicert CDROM Backup System – Detailed Instructions

Why Make A Backup?

It's not a question of IF your computer will crash, it's just a question of when. Wear and tear, computer viruses, software bugs, power failure and user errors can all cause the sudden loss of valuable data. Imagine the sudden loss of all patients, billing history, appointments, patient notes, accounts receivable and all pending data – all gone in an instant. Our only protection is a good backup system.

Diskette Backup

Navicert initially ships with a diskette backup system. This system is easy to use and inexpensive. It's perfect for at least the first few months of use. The problem is that computer diskettes only store a small amount of data. As your database grows you will use more and more disks to back up your data. Each disk holds the risk of an error. As the number of disks increases so does your chance of a bad disk and one bad disk will ruin the entire set. Waiting for each disk to finish and changing to a new disk consumes valuable staff time. When your backup set is more than 3 or 4 disks in size you should strongly consider moving to a high capacity backup system.

High Capacity Backup Systems

There are a number of backup types available. Each has it's own advantages and disadvantages. Common backup systems are CD or DVD backup, tape drive, DAT drives, Zip discs, USB memory sticks and LS-120 disc drives.

Backup System	Advantages	Disadvantages
Tape Drive	None	Expensive, Slow, low capacity
• DAT Drive	High Capacity, Faster	Expensive, Custom Software
• ZIP Drive	Widely Available, Fast	Expensive Media
USB Stick	VERY fast	VERY Expensive, Custom Software
• LS-120 Drive	Reads standard disks & 120MB	Expensive Media, discontinued
CD Backup	Fast, Cheap, High Capacity	Requires custom software

Tape drives have fallen out of favor in recent years because they are relatively expensive, slow and hold less information than other systems. DAT drives are expensive but faster and hold large amounts of data. Older Zip drives are slow and only hold 100MB of data however Zip drives have been constantly updated and new Zip Drivers now fast and hold up to 750MB of data. Blank Zip discs are relatively expensive. USB Memory sticks are quite expensive but very fast and hold anywhere from 128 to 256MB of data. They are not really designed for routine backups but can be a great way of quickly moving data from one computer to another. LS-120 drives held promise when introduced because they worked with both standard disks and with high capacity 120MB discs. They had some reliability problems and never did really catch on.

CD/DVD Backup

Recently most people are using CD or DVD backup systems. CD Writers are now very inexpensive as are blank CD's. The main problem with CD backup's is the fact that most programs can not directly write to a CD Rom. You need to purchase and learn to use a CD Rom burning program. Some common programs for CD Writers are Nero or Easy CD Creator and customers who own these programs are certainly encouraged to learn to use them. These programs can make backups, music CD's, Video CD's and more recently even DVD's.

The average Navicert user doesn't make a lot of music CD's. They want a simple reliable backup system that integrates with their Navicert software. For this reason, we have created the Navicert CD Writer Backup System.

Navicert CD Writer Backup System

To use the Navicert CD Writer Backup System you will need a compatible CD Writer. A CD ROM Drive can read CD's but can not write to them so make sure you have a CD Writer. Most CD Writers are compatible with Navicert however if your CD Writer is very old and slow you may wish to replace it with a more modern unit.

Burn Proof Technology

CD Rom drives read CD's by bouncing a low power laser off the surface of a CD. CD Writers use two lasers. The high power laser burns small pits in a blank CD and stores data. The second lower power laser is used to read the pits and retrieve the stored data just like a regular CD Rom Drive. Once the high power laser turns on, it begins burning small dots and dashes on your CD Rom. If your computer can't get data to the CD Rom drive on time or if something interrupts your CD writing software, the drive can't write the needed dots to the CD and the CD is ruined. This was a huge problem with early CD units and annoying when CD's were very expensive. New drives come with "Burn Proof" technology and large buffers which greatly reduces the number of ruined discs. The Navicert CD Writer Backup System supports "Burn Proof" technology.

CD/DVD Writers

Recently, CD Writers have been replaced by DVD Writers. DVD Writers can burn huge sums of data to blank DVD's but they can also write to CD's. Navicert will work with both CD Writers and DVD Writers, with CD's and with DVD's. Since most databases are not large enough to warrant the use of DVD's, most customers will probably use CD's for backup even if they have a DVD writer. In this document, when writing about CDR's and CDRW's you can generally apply the same information to DVD's and DVD-RW discs.

CDRW/DVDRW Discs

CD's (and DVD's) come in two types. First is the CDR which can be used a number of times. Each time data is written to the disc there is less free disc remaining. Eventually the disc is full and the disc must be replaced. The next type is the CDRW which works the same way but which can be erased and reused when it is full. We recommend the use of the CDRW with the important caveat that you MUST replace your CDRW's when they become worn out. The length of time you use a CDRW depends on the manufacturer but as a general rule, you should plan to replace your CDRW roughly every 6 months.

DVD writers come in two types. The first is the DVD –R and the second is the DVD +R format. Some DVD writers will handle both formats. If using blank DVD's, make sure to get the right type for your DVD writer.

Formatting a CDRW Disc

You may be familiar with diskette backup. Computer Diskettes must be formatted before they are first used. Most diskettes come pre-formatted from the factory. CDRW's may come formatted from the factory however they usually are completely blank. The Navicert CD Writer backup system does not require your CDRW to be formatted before first use however you may format the CDRW if you wish. It is not necessary or even possible to format a CDR disc.

If you decide to use CDR's you will need to replace them when they are full. Your CDR will hold 650MB to 750MB of data. 1MB (Megabyte) of data is roughly one million characters. Your Navicert databases will run anywhere from 5 to 150MB or more. If you are backing up 50MB of data to a 650MB CDR, you can use your CDR about 13 times and it will then be full and must be replaced with a fresh CDR. Navicert will warn you when your CD no longer contains enough free space for your backup. Your CDRW holds roughly the same amount of data but once it is full you can erase the CDRW and use it again and again.

Backup Failures and Problems:

Some computer users seem to perversely enjoy doing strange things with computer software and this invariably causes huge problems for the rest of us. The best way to avoid this sort of problem is to avoid doing the weird thing in the first place. Sadly most computer users who do weird things don't know that what they are doing is weird. This sort of computer user is both very unpredictable and dangerous. Approach with caution and get them to step away from the computer.

Things you shouldn't ever do:

- Try to erase a totally blank unformatted CDRW
- Start a backup then eject the CD before it is finished
- Click the erase button during a backup
- Any of a zillion other things I can't think of right now but I'm sure someone will try.

These actions are likely to cause unpredictable results and backup failures. Other common problems that often cause backup problems are full discs, dirty discs, dirty CD laser units, using very slow discs in very high speed CD writers, trying to use a DVD in a CD Rom Drive and probably a million other things.

In the case that your backup system seems to have become unstable and backups are failing you should reboot your computer and consider replacing the CD that you are using. Make sure your CDR or CDRW is the right speed for your CD Writer. Modern CD Writers work at very high speeds and require fast CDR's or CDRW's to keep up. You may also want to try using a CD Rom cleaning kit to clean your CD Rom drive. If you have rebooted, replaced the CD and cleaned your drive but you still have problems please call Navicert Technical Support.

Starting your Navicert CD Writer Software:

To use your Navicert CD Writer software you must make sure that it has exclusive access to all databases. If you are running on a network, make sure all other terminals have exited from all Navicert programs. Make sure your terminal has exited from the Appointment system and is only running the CBS Navicert billing module.

Next, click on the Utilities tab then click on File and finally click on Backup. Once you do this, you will see your Navicert Backup screen.

Using your Toolbar to Start your Navicert CD Writer Backup System:

You can also activate your Navicert CD Writer backup system by clicking on the CD Icon on the toolbar of the main Navicert screen.

🥥 CBS Navice	CBS Navicert EMR v1.95 Site #367 TERM1										
Eile											
	Billing		Appointments	Y	Electronic Med	lical Records	Word Processing		Utilities		Messages
Address Labels	🚟 Backup	Check For Update	Edit Data Files	Statistics	System Settings	Update Staff	Site View EMR Certificate		v Error .og Log		

Navicert CD Writer Backup System Main Screen:

Once you have started your Navicert CD Writer Software you will see:

1:0	:0,D: MATSHITA DVD	-RAM UJ-8415 1	.21	Мах	•		
	<u>E</u> rase Disc	Eject		<u>B</u> ackup			
	<u>F</u> ormat Disc	<u>A</u> bort		E <u>x</u> it			
Data Files Custom Ci\program files\navicert\data C:\Program Files\Navicert\ExtDocs				c: [Tablet C] cbs32 Backup CBSWord CBSWordDistrib Distrib	 ▲ 0D/ 1.2 1.3 1.4 150 200 200 	AY.txt Day.txt DL.LAB il2.lab	•
Delet	e <u>I</u> tem <u>D</u> elete All	<u>S</u> ave List		Add Directory		Add F <u>i</u> le	
:BS Navio	cert EMR Backup Loadec						
				_			

IMPORTANT: Selecting your Burner

Some computers have two or more CD/DVD drives. If this is the case for your computer, you must first select the drive you wish to use from the drop-down box at the top of the screen.

🔤 CBS CDWriter Backup [IDLE]

1:0:0,D: TOSHIBA_DVD-ROM SD-R2312 1905

Selecting Backup Set:

You can select to backup your Data Files or you can select a custom backup and select your own files. You can add additional files or folders to this list and you can also remove items from the list, however removing critical databases from the backup set is not recommended.

	📀 Data P	Files	00	ustom
C:\P C:\P	rogram File rogram File	s\Navice s\Navice	rt\Data rt\ExtD	a Jocs
		- ,		
			_	Ir
Del	ete <u>I</u> tem	<u>D</u> elete	e All	<u>S</u> ave List

Adding Files to your Backup Set

To add additional files to the backup set you would use the file browse. You can select either a full directory or just an individual file. If you are adding an individual file, first select the file with your mouse then click the Add File button.

If you are adding a directory, first make sure the folder is open then click the Add Directory button.

If you have selected a full directory, all files in that directory are automatically selected so there would be no point in selecting an individual file inside that same directory.

Removing Files from your Backup Set

To remove an item from the list, first click on the item then click the Delete Item button. To clear the list and start over, click the Delete All button. Remember that deleting an item will affect the list only for the current use of the program. Once you exit out of the program and start it again, the list will go back the way it was when you started the program. To save any changes you must click the SAVE LIST button.





Erasing your CDRW Discs

As mentioned earlier, CDRW discs can be erased. The information as to what data is stored on your CDRW is located in a directory track that is physically located nearest to the centre of the disc. You can erase the directory track and the disc will appear to the computer to be entirely blank and ready for use.

The more thorough method of erasing your CDRW is to format the CDRW. This process erases every track on the disc and tests the CDRW thoroughly. The format process takes much longer but does a much more thorough job. For most purposes the Erase function will be all that is required.

Inserting your CDR or CDRW Disc

When you have selected the files you wish to burn it is time to insert your CDR or CDRW into the drive. Once inserted make sure to wait a moment. Many versions of windows, in an attempt to be helpful, will bring up a window asking you if you want to view the CD, etc. If your system brings up a window like this, you must wait for that window then CLOSE it before you can use the Navicert CD Writer Backup System.

Starting the Backup

Probably the most important part of the Navicert CDWriter Backup system is the **Backup** button. When your CD Writer back up files have been selected, the proper drive has been selected and the CDR or CDRW has been inserted just click the Burn button. Navicert will display progress information at the bottom of the screen. You will also see a spinning CD displayed as the CD burn process progresses. When the backup is finished, the progress bar will be at 100% and the spinning CD will vanish.



Wait for the Backup to fully Complete

Once the backup is complete, your Navicert CD Writer Backup system must flush all hardware buffers and close the data track. Please allow the system time to complete the burning process. Do not eject the CD – Navicert will do that for you when it's time.

Rotate Your Backup Set

Remember to have at least 3 backup CD's. Better still, have one backup CD for each day of the week. Back up your data every day you use your computer. **Never** use the same backup disc twice in a row. Follow these rules and your data will be safe and sound.

Remember to make a backup every day you enter information into your Navicert software and you will have smooth sailing.

Erase CDRW Eject CD	1:0:0,D: TOSHIBA	DVD-ROM SD-R231
	Frase CDBW	Fiect CD

Check For Updates

Note: You must have an Internet connection available on your Navicert billing computer for this feature to work.

The Check For Updates feature allows Navicert to use your internet connection to connect to the Navicert server and see if a new Navicert update has been posted. We recommend you use this feature frequently after a major mail-out and at least once a month throughout the year. Just click on Utilities then click on Check For Update.

Check for Updates	
Progress:	
0%	
0 Byte(s)	Project1
ogs	You have version: 4.3f Version on Server: 4.3g. New Version Available. Do you wish to download it now?
	If a new version is available, Navice that information on the screen and wish to download it.
Check For Update Exit	Project1
	Download is finished. Do you wish to install now?
	<u>Y</u> es <u>N</u> o

After the update has been downloaded you will be prompted to install it. Just click YES and Navicert will load your update for you. Once an update is loaded on one computer on your network, it will signal all the other terminals. The next time they start Navicert each terminal will automatically update to the latest version.

Cull Data

Navicert maintains a database of all billing data and all patient data indefinitely. If data files become very large, system performance can suffer. In addition, you may fill all available storage on your and finally your backup media may no longer be large enough to hold all the data. For these reasons you may wish to delete some older data.

Caution: Improper use of this ful	nction will result in permanent data loss.
Select Doctor if Desired: All Doctors	•
Cull Patient Information	Cull Patient History
Delete Patients Not Seen Since:	Visits To Keep: Years To Keep
🔽 Keep Patients with no Billing History	Cutoff Date

WARNING: Before you begin make certain you have a very recent backup on new disks. The cull operation is NOT reversible and the only way to recover lost data will be with a backup.

First, select the doctor you wish to delete for from the drop down box at the top of the screen.

• Cull Patients

If you wish to delete patients you should use this option. Next you will wish to select the Patient options. You may wish to keep all patients seen in the past 5 years, as an example. To do so, enter the appropriate cut-off date in the box marked "Delete Patients not seen since:".

If a patient has no history on file Navicert will not be able to determine the last date the patient was seen. These may be patient's who's billing history was previously culled. In some cases these are patients moved from another billing system or Navicert for DOS. They may be patients from the initial MSP download or they may be patients who were entered using the appointment system but never billed. In any event, if you wish to keep these patients click the box "Keep Patients with no history". If this box is not checked, Navicert will delete all patients without billing history.

Naturally all billing history for any patient who is deleted will also be deleted.

• Cull History

The Cull History option will allow you to remove some or all of a patient's history. Remember that when the history is removed it can not be restored. Be very careful using this feature.

You may keep a certain number of visits or visits over a certain period of time. For example, a patient may have been seen 5 times this year 1 each year for the previous 5 years. If you elected to keep the last 3 years of history, Navicert would keep all 5 visits from this year and 1 visit from each of the previous 2 years. Visits prior to that would be deleted.

Using the same example, you may elect to keep the past 5 visits. In this case, since the patient had 5 visits this year, only the most current year would be preserved. Every visit prior to the present year would be deleted.

If you elect to keep BOTH the last 5 visits AND the last 3 years then Navicert keeps either the last 5 visits or the last 3 years, whichever is greater. In our example, Navicert will keep the past 5 visits from the current year and one visit from each of the 2 years prior to the present year.

You may also elect to use a specific cut-off date rather than a certain number of years. For example, if one doctor retires and you wish to delete all services for that doctor you could click the cut-off date box and enter his date of departure in this box. Don't forget to specify which doctor you wish to work with in the drop down box or all doctors in the clinic will be used.

Data Import / Export

The Data Import / Export option allows you to transfer data from one Navicert program to another Navicert program. Do NOT use this option to attempt to bring data into Navicert from any other source. Improperly formatted data can result in severe and permanent database damage.

The most common use for this function would be to enter data on a laptop computer or at a satellite office then bring the data to the main office on a diskette.

Import/Export Data		
Export Device Options C Drive A: C Drive B: C Hard Drive C Other	All Doctors Start Date: End Date:	×
Export/Import Options Recent Patients	<u>C</u> lear Export List	Format Disks
 Every Patient Patients + Billings 	Reset Exports	Conversion Table
C Export Patients by Date of Posting Export Patients by Date of Service	Data Export	Clear Table
Block Incomplete Records	Data Import	E <u>x</u> it

The computer sending the data out is the computer that will use the Export function. To export information you must first make a few settings. First select the doctor you wish to work with or leave the system set to All Doctors. Next select the drive you wish to export data to (usually Drive A). Next select either Recent Patients (patients seen since the last export) or Every Patient (all patients in the system) or more commonly Patients + Billings. This final option will export all recent patients plus any billings entered for those patients.

Once you have made your choices click on Data Export. Navicert will prepare the necessary file and transfer it to a diskette. Navicert will offer to make a backup disk which would be kept in case the original disk was lost or damaged.

The disk would then be taken to the other Navicert program and the user would click on Data Import to read the data into the system.

• Format Disks

The Format Disks option allows you to erase any data from a disk and test the surface of the disk for errors.

• Conversion Table

The Conversion table is used when the doctor number is different on the Exporting and Importing computers. The Importing computer would set up a conversion table. For example, if Dr. Smith is doctor #1 on the exporting computer but he is doctor #3 on the importing computer it will be necessary to set up a conversion table. Otherwise the billings from doctor #1 on the exporting computer will remain as doctor #1 on the importing computer and the wrong doctor will be paid for the services.

X

OK

Cancel

Enter Doctor on

Exporting Computer (type 0 to Exit - Type ALL to Convert All Patients)

When you select Conversion Table, Navicert will ask for the number on the exporting computer (1 in our case). Navicert will then ask for the number on the Importing computer (3 in our case).

Clear Conversion Table

If you wish to erase a conversion table and create a new one just click the Clear Conversion Table button.

• Clear Export List

This function will clear the list of patients and billings waiting to be exported. After you clear the export list, no data will be exported until new data is entered into the system.

• Reset Export List

This function will signal Navicert to export all pending services whether they have been already exported or not. This can be useful when a disk is lost and no backup is available. Be careful to avoid using this feature in error because duplicate billings may be caused if the same data is exported then imported more than once.

Edit Data Files

🛱 Edit Data Files		
 Fee Schedule Referring Doctors ICD Codes Postal Codes 3rd Pty. Agents Dental Codes 	Fee Code Specialist Fee G.P. Fee Agent Rule Units Allowed Copayment Description	0058 \$26.40 \$26.40 MCIB X - Visit No Image: State of the
🕂 an 🏚	Search	<u>Clear</u> <u>Delete</u> <u>Save</u> <u>Ex</u> it

The Edit Data Files function is a powerful utility that allows you to add, delete or edit records in a number of Navicert databases.

Editing the Fee Schedule database is one common use of this utility. On occasion MSP will issue a short update to the fee schedule. When MSP changes a large number of fee schedule items we will issue a new fee schedule update disk which will automatically make the needed changes to your database. If there are only one or two codes that are changed the customer will need to enter these changes manually.

First click on Fee Schedule to select the fee schedule database. Next click on the Look Up button. Enter the fee code you wish to edit. Navicert will then ask for the Agent. Just press <ENTER> to select MSP. The fee data will be displayed on the screen. From here you may adjust any of the items displayed except the fee code. When you are done with the changes you must click the SAVE button. You may also delete the fee code by clicking on the DELETE button.

Edit Fee Schedule Database

Description of Field	Meaning and Usual Values
Fee Code	A code (usually issued by MSP) which consists of 3 numbers followed by a letter – 005B for example
Specialist	The rate a specialist bills when seeing a referred patient
GP	The rate a General Practioner or Chiropractor bills a service at
Rule	The MSP fee schedule rule. Valid rules are: 0, 10, 42. Use X for Visits. Use A for add-on procedures. Use D for Diagnostic procedures.
Agent	The agent the fee is to be billed for. Note that if the agent is set to MSP then that code may be billed to any third party agent.
Units Allowed	Set to Y or N. Determines if Navicert will allow multiple units of a procedure to be billed. For example, 897L X 4 units.
Copayment	At present only used by Chiropractors. Set to the amount billed directly to the patient above the MSP billed amount.
Description	Optional. This field may contain the description of the service code. Useful for printed 3 rd party statements but not needed for MSP billing.
Older/Current Fee Schedule	Navicert maintains two fee schedules. Select the schedule you wish to update.

You are not limited to editing existing codes. You may enter a brand new code. For example, if you wanted to enter a code 999I to represent a special procedure that was not covered by MSP you could easily do so. Make sure to select a valid Third Party agent such as WCB or 0001 (billed directly to patient). Make sure to fill in all the fields before you click SAVE. Contact our office if you need any advice or assistance with this feature.

Other Databases

You may select another database, for example the ICD Codes database or Referring Doctor database. You may wish to enter 10 common diagnostic codes and descriptions all at once. To add a new ICD code just click ICD Code (to use the ICD code database) then click ADD. Fill in the description and code then click SAVE. Repeat for each of the remaining codes until you are finished.

It is possible to have Navicert print out all ICD codes in the system. Just click the Print ICD Codes button.

On occasion, Navicert will send out an updated list of referring doctors. To read this list into the system you will need to follow the instructions on the update disk. In general you will load the disk then click the Update Ref. Doc button.

You may also print a list of all referring doctors by clicking the Print Ref. Doc. List button.

Merge Charts



In rare cases, two charts might be created for the same patient. For example a patient may switch from an out of province patient to a Saskatchewan resident. The proper course of action is to bring up the patient, change the billing number and address then save the chart. But perhaps the staff didn't know about the out of province chart at the time and

just made up a new chart. The same thing could happen when a patient changes their name after marriage, or when a baby changes from the mother's PHN to his own PHN.

Whatever the reason, two charts for one patient is something we want to avoid. The Merge Charts feature allows you to take all the billing history, appointment history and pending services from one chart then merge them into another chart, then delete the first chart. To activate this feature, click on Utilities then on Merge Charts. Next, click on Select 1st Patient to select the first patient. The "first patient" chart will be the one that is deleted so make sure you have the right one. Next click on "Select 2nd Patient" to select the other chart. The "Second Patient" is the chart that will be left once you are done.

Finally click the Merge button. The system will take all information from the first patient and move it over to the 2nd patient then delete the first patient's chart. Note that you may now have duplicate entries in the patient history. This happens because services that were entered under the 2nd patient were sent out but MSP payment may have come in to the 1st patient chart. Now that the two are merged into one chart there could be duplicate entries. To correct this you will need to manually weed through the billing history. See the section under Third Party – Reconcile Payments. In this section you can manually delete duplicates or mark unpaid services that previously would not reconcile.

Quick Keys

The Quick Keys feature allows you to assign a Diagnosis, Service Code or Referring Doctor to one of the 12 function keys at the top of your keyboard. First, use the pull down at the top of the screen to select Diagnosis, Service Code or Referring Doctor. Next, fill in the desired value. For example, if you frequently see patients with an upper respiratory tract infection you would click in the Function Key F1 slot and type Infection. Allow Navicert to browse the diagnostic code database and click on the desired code.

You can continue this way to fill in up to 12 different diagnostic codes. When you are finished click Save.

The next time you are billing a patient, when your cursor is in the diagnosis field, just press F1 and Navicert will instantly fill in Infection – Upper Respiratory.

Assign Quick Keys	
Selected Keys:	Quick Diagnosis
	F1 is Reserved for Help Functions
Function Key F2	ACUTE LUMBAR
Function Key F3	BRACHIAL RADICULITIS
Function Key F4	
Function Key F5	
Function Key F6	
Function Key F7	
Function Key F8	
Function Key F9	
Function Key F10	
Function Key F11	
Function Key F12	
	Save Save
	Saile Field

In the same way you can assign up to 12 Referring Doctors and 12 frequently used Service Codes.

Use of the Quick Keys can certainly speed up your billing but of course you must remember which service code, diagnosis or doctor you have assigned to each key.

Recall List

The recall list is a simple feature which will allow you to place patients on a list and then view the list at a later time. A common use of this feature might be to schedule patients for follow-up visits or to use the list as a waiting list.

There are two parts to the Recall system. First the patient must be placed on the list. The easiest way to book a recall visit is from the Patient information screen. Click Patient File then Enter Services and select the patient you wish to book. You may remember that along the bottom of the patient information screen there were a

🖻 Patient Recall						
Patient	Date	Doctor	Code		Reason	^
						~
Start Date:			Doc	tor#:		
End Date:			Cod	e:		
rr	r r				r r	
<u>Add</u>	Delete	🛷 Sha	w All 😑 Clear	Old 合 Print	<u>Search</u>	E <u>x</u> it

number of buttons. One of those buttons was labeled RECALL. Just click that button.

Add Recall	
Patient:	AADLAND, DONNA
Recall Date:	Jan 01, 2008
Recall Dr.:	1 1) DR. HAPPY -
Recall Code:	RV
	<u>S</u> ave E <u>x</u> it

The other method of booking a recall is to click the ADD button along the bottom of the Recall screen. Either way, once the system has been instructed to add a recall you will see a screen displayed.

The Recall Date field should be filled in with the date, perhaps 6 months in the future, that you wish to book the recall for.

The Recall Doctor field should be filled in with the doctor you wish to book the recall with.

The Recall Code is an internal code which is used only in your clinic. You will need to decide the various reasons for a recall and what each code

means. In the example above, RG was used to indicate Recall Glaucoma. The Recall Reason is used to provide a brief description of the reason for the recall. It's not necessary to enter a Recall Reason but it can be helpful.

As each entry is made into the database the recall list will grow. It is advisable to review the recall list on a regular basis, perhaps daily. There is no point putting a patient on the recall list if the list is never reviewed and processed.

When you first select the Recall List from the Utilities menu you will see all pending recalls from the first through the last. You can limit the list by entering a Start Date and an End Date. Recalls which fall outside the selected dates will not be displayed.

You may further limit the list by selecting a doctor to work with. Finally

Patient Recall

 Patient Accul

 Patient
 Date
 Doctor
 Code
 Resson
 AdDLAND, DONNA
 Jan 01, 2008
 1 RV
 Review

 Addland
 Jan 01, 2008
 1 RV
 Review

 Acculate
 Jan
 Jan

you can enter a Recall Code in the CODE field. Only recalls which match the code you entered will be displayed.

Additional Controls:

The ADD button, as described previously, adds new entries to the recall list.

The EDIT button allows you to make changes to the highlighted recall. Just click the Recall you wish to work with then click the EDIT button.

The DELETE button is used to erase a recall once you are finished with it. Use caution – there is no automatic way to undelete an entry.

The SHOW ALL button will display all recall records.

The CLEAR OLD button will first ask for a cut-off date and then delete all Recall records prior to the cut-off date. Usually this feature is used once the Recall has expired.

The PRINT button will print a list based on the dates, doctor and recall code selected.

The SEARCH button will allow you to search the recall list for one specific patient.

Reindex / Repair Database

An Index is used to quickly locate information in a large database. On occasion it is necessary to rebuild these indexes to keep the system operating at optimal speed. Every month Navicert will automatically ask if it can reindex the databases but you can elect to reindex at any time using this menu entry. It may be advisable to reindex after a sudden loss of power.

It is only possible to reindex if the system has exclusive access to the database. If you run both appointments and billing at the same time on the same computer you must exit from the appointment system leaving only the billing system running.

If you are on a network you must make sure that all other terminals on the network have exited from the appointment and billing programs before you begin.

Site Certificate

Your Navicert Software is generally licensed to you for a period of one year. When that year has expired you will need to enter a new Site Certificate. Your new Site Certificate code is automatically faxed to you when you order and pay for your yearly Update and Support Service.

CBS Site Certificate	
Please Enter Your Site Certificate Below:	
367E0200201893	
<u>Save</u> <u>Exit</u>	

If your certificate is expired, as a courtesy, your Navicert software will continue to function normally for a period of time. During that time period, Navicert will prompt you to enter a new Site Certificate code.

Navicert will ask "Would you like to enter your new Site Certificate Code Now?". If you don't have your new code yet, click NO. When you have your new code click YES.

If you obtain your new code before the old code expires you may enter it early. You do not lose any days of support by doing so. Just click on Utilities then Site Certificate.

Enter the code number exactly as it appears on your renewal form and click SAVE. If you make an error in the number, Navicert will prompt you to re-enter the number.

Statistics

The Statistics function is a powerful utility which can be used to locate information in your Navicert database.

The use of this function is very simple. First you must determine the information you wish to find. For our purposes we will take a simple example. We will find all female patients 65 years of age or older who have had pneumonia in the past year. We will assume that today's date is July 17, 2001.

We would enter the Start and End dates to cover the previous 12 months. July 17, 2000 – July 17, 2001. The ICD code would be 486 for Pneumonia and Sex would be F for Female.

Navicert Statisti	ics	
Start Date:		Agent
End Date		Error Code
ICD Codes		Clinic Number
Service Codes		Sex
Start Name		Address 1
End Name		Address 2
Start DOB		City
End DOB		Misc. 1
Location		Misc. 2
Treating Dr.		Misc. 3
Ref Dr.		
- Selection Options -		Output Options
		Printer C Screen C Disk File
Match All	 Print Patient 	
C Match An	V C Print Convince	
	Plant Services	
	Count	<u>Start</u> E <u>x</u> it

We want to make sure that the patient is at least 65 years of age so the END DOB would be filled in to be July 17, 1935. Patients born prior to this date are at least 65 years old and since we don't want to set an upper age limit we don't need to put in a Start DOB.

We want to find only patients who match all these items so we would set the Options to Match All.

If you only want to print out the patient's name one time you would put the system to Print Patient. If you wanted to list every service for every patient matching your criterion you would put the system to Print Services. In our case we only want the name of each patient matching our criterion not a list of every visit

Selection Options	
 Match All Match Any 	 Print Patient Print Services

these patients have had so we would set the system to Print Patient.

If you only wish to know the total number of matching records you may click on the Only Print Totals box. If you are doing a search and you want to know how many unique ICD or Service codes are found for each matching patient you may click on the Count Each Service Code or Count Each ICD Code box.

Other Statistics Functions:

Patient Count will give you the total number of patients in the system. Since Navicert keeps a count of the number of records in it's database this result is presented instantly. Navicert then asks if you would like a breakdown of the total per doctor. If you would like to know how many patients are recorded for each doctor, Navicert must search through every record in the system and thus there will be a delay reporting this information.

Submission Manager

CI	ick on File then Cli	ck Reprint or Resubmit		
Folder Name	Date	Folder Type	^	
061215-1	Dec 15, 2006	Submission		Submission
061215-2	Dec 15, 2006	Submission Number 2		C Beturn File
061228-1	Dec 28, 2006	Submission		, notainnic
061228-2	Dec 28, 2006	Submission Number 2		
061228-3	Dec 28, 2006	Submission Number 3		
070111-1	Jan 11, 2007	Submission		Besubm
070123-1	Jan 23, 2007	Submission		د.
070125-1	Jan 25, 2007	Submission		
070208-1	Feb 08, 2007	Submission		E
070209-1	Feb 09, 2007	Submission		<u>H</u> eprin
070209-2	Feb 09, 2007	Submission Number 2		
070209-3	Feb 09, 2007	Submission Number 3		
070209-4	Feb 09, 2007	Submission Number 4		• E <u>x</u> it
070209-5	Feb 09, 2007	Submission Number 5	~	

Submission Manager allows you to either reprint an old submission or to resubmit the services to MSP.

Usually you wouldn't need to do either of these activities, however on rare occasion a submission file will have a doctor rejected or need to have a clinic number changed, etc.

To resubmit all claims for one or more doctors for a given submission period, first select the submission by date from the list that appears. Next, click the Resubmit button. This will bring up the following form:

POBOLD/	Doctor #	Clinic III	Mode	Corp	Total	New Doc	New Clinic	New Mode	New Corp
Yes	0001	999	1		\$38.90	0001	999	1	
Yes	8005	401	1	A	\$36,178.43	8005	401	1	
_									

First, make sure the doctor(s) you wish to submit are set to YES in the first column. Change any doctors you do NOT wish to resubmit to NO by clicking in the first column. You can now click in the New Doc, New Clinic, NewMode or New Corp column and make any needed changes.

When you are finished, click the Resubmit button and Navicert will take you to the Submission Method form and allow you to send your files to MSP with the selected changes.

You can also use Submission Manager to just reprint a previous submission without actually sending the files to MSP. First select the submission from the list. Next click the Reprint button. Navicert will reprint the submission for all doctors in that billing period.

Submission Manager can also reprint or reprocess return files.

🖻 Reprint Submission 📃 🗖 🔀
061215-1
All Doctors C Select Doctor
MCIB Submission Report
VCB Claims
🔽 SGI Claims
Other Third Party Claims
<u>Reprint</u> E <u>x</u> it

Put the dot on Return File then select the return file by date from the list that appears.

If you lost the print-out of your return file you can print it again. Just click on the return file by date from the list then click the Reprint button. Navicert will then print out the return file again. Don't lose this one! ③

System Settings

System Utilities	
Set Clinic Address Set Printers Set Data Path	s Sign In Options Require User Sign-In Disable User Sign-In Contract (Tablet PC) Save Settings Exit

The System Settings are used to determine how your system operates. Usually your Navicert system will be set to operate properly when it is installed and it will not be necessary to use this menu. Please be cautious about

the use of this screen since it is possible to make several disruptive changes to your system.

Set Clinic Address

This screen lets you set the clinic address which is used in reports and print-out's.

Set Printers

Allows you to set the printers used in Navicert.

Set Data Path

Sets the path where CBS Navicert Data files are located.

Check for Messages How Often?

Navicert allows customers to exchange messages between terminals. Navicert will check every now and again for new messages that may have been delivered. Usually once every 10 to 30 seconds is a good setting.

Sign In Options

Require Users Sign-In causes Navicert to bring up a sign-in screen that requires users to enter a password in order to use Navicert. You can disable this option by selecting Disable User Sign-In.

Set Monitor Orientation

Some lap-top computers such as Tablet PC's can be used in Horizontal or Vertical alignment. Use this option to select the way Navicert displays the page.

Note: Don't forget to click Save Settings to save any changes you have entered.

Update Staff

The Update Staff function allows you to add, remove or edit doctors registered in your clinic.

The **ADD** Button is used to add a new doctor to your clinic. Fill in each field as described below and then click SAVE. Navicert will assign a number to the doctor and inform you of the new doctor's number.

When you are entering a new doctor you may press the **CANCEL** button to erase all information you have entered and start over.

The **DELETE** button is used to remove a

Doc #	Initials	Name	MCIB	Clinic
1	DG	DR. HAPPY 11	234	401
2	MD	DR. SMILES 0	0001	999
3	RV	NOT USED 0	0002	401
4	FD	OR. FRIENDLY 9	9111	310
Name Address City/Prov Postal Code E-Mail Corp Name Corp Letter (id	DF 10 54 54	FRIENDLY Special 302111TH AVE. Declarit INA, SK Location Ultrasoc Default GST # PST #	list Y I Sex FD Initials FD und 1 I Serv. 0095	
) octor # Billina #	4	Phone (306) 555-1212 MTAS # Fax DVA #	*	
Clinic #	310	X-Ray SGI #		
	1			

doctor. Navicert does not allow gaps in the doctor's list. For that reason Navicert will only allow you to delete the last doctor in the list. If there are 4 doctors registered to work in your clinic you may only delete doctor #4. Once Doctor #4 is deleted you may delete Doctor #3 and so on.

Cauton: Each patient seen in your clinic is assigned to a specific doctor on his first visit. All history on that patient will show the treating doctor's number. If you delete this doctor it will cause problems when you attempt to print patient history. In addition, if MSP issues payment for a doctor that you have deleted from your system it will cause problems when reading the return file.

The **PRINT** button prints your doctor list.

The **UPDATE** button saves your changes.

Fields in the Doctor Registration Screen:

Name

The Doctor's name is entered in this spot. For example, Dr. I. M. Healthy.

Address

The address where you wish paper correspondence to be sent.

City/Prov

The city and province where the doctor lives. For example, Regina, Sk. or Saskatoon, Sk.

Postal

The postal code. Note that MSP does not accept spaces in the postal code.

E-Mail

Sets the doctor's E-Mail address

Corporation

If your doctor has registered a corporation in Saskatchewan he will often realize substantial tax savings. To bill as a registered corporation to MSP the doctor should first inform Sask Health as to his corporate status. He will need to inform Sask Health as to the Start Date he will begin billing as a corporate doctor. All billings before the Start Date must be submitted to MSP without the Corporation information. You will need to enter all billings and then prepare a billing file. Once the billing file has been sent to MSP you may enter the corporation information - HOWEVER – you may no longer bill for services prior to the Start Date so be sure all information has been submitted.

The other method that can be used is to enter the doctor into your system twice - once without the corporate information (doctor #1 for example) and once with the corporate information (doctor #2 for example). Billings prior to the start date would be billed under doctor #1 and billings after the start date would be billed under doctor #2.

The Corporation letter is entered first. It must be an A, B or C. The first corporation a doctor has registered will always be entered as an A. If the doctor has more than one corporation it should be entered as a B and the third corporation entered as a C. No more than 3 corporations are supported under MSP specifications.

The Corporation Name is optional. It may be a numbered corporation or a name. If the name is too long it will be truncated to fit the screen.

Doctor Number

The Doctor Number is the number assigned by Navicert to each doctor in your clinic. The first doctor is 1, second doctor is 2, etc. Do not confuse this number with the Billing Number. Note that you do not fill in this number. Navicert will assign it for you.

Billing Number

This is a 4 digit number assigned by MSP to each Saskatchewan physician. MSP may add a 5th digit to the end of the billing number as a check digit when processing manual entries. Only enter the first 4 digits.

Clinic Number

The Clinic number is assigned to a group of Physicians. It is a 3 digit number. A doctor may belong to a number of clinics at the same time. If a doctor in your office bills from multiple clinics you will need to enter him into the system once for each clinic number. Solo doctors are usually assigned a clinic number of 000. Locum doctors are often assigned the same billing number as the sponsoring doctor and a clinic number of 900 or 901.

Clinic Number Continued...

If you are unsure of the doctor's billing number or clinic number please contact MSP and clarify the information. If you bill a doctor with the wrong billing number or clinic number it will cause the doctor's billings to be rejected.

Mode

The Mode field is used to identify the type of doctor and payment method being used.

- Mode 1 is Fee for Service.
- Mode 6 is for Optometrists
- Mode 8 is for Chiropractors
- Mode 9 and Mode 0 are for alternative payment methods such as a doctor working on salary or a nurse practitioner or global budget clinics.

If you are unsure what mode to use contact the Navicert office or MSP.

Phone

The telephone number for the doctor. This number appears at the top of invoices and print-outs.

Fax

The fax number for the doctor.

X-Ray

Used by Chiropractors. Set to Y if the doctor takes X-Rays and bills the technical component. Set to N if the doctor does not take X-Rays. Set to B if the doctor bills both Technical AND Interpretive component for X-Rays. Can be left blank if the doctor is a physician or if the doctor does not take X-rays.

Default ICD

Most offices will leave this spot blank. Exceptions would be radiologists who always bill a Z21 as a diagnostic code or anesthetists who always use Z17 as a diagnostic code.

Specialist

Set to Y if the doctor is a Specialist or N if the doctor is a GP or Chiropractor.

Default Sex

Generally left blank. This field can be used by Gynecologists who see mainly female patients to speed data entry.

Initials

Enter up to 3 letters in this box. These initials will be displayed when there isn't enough room to display the doctor's full name. For this reason it is important that each set of initials be unique.

Location

This is the location where most services will be billed from. Location 1 is for the Office, 2 for Hospital Inpatient, 3 for Hospital Outpatient. There are a number of other locations but these are usually the only ones that would be used for the Default Location. Naturally you may use any location code you wish when billing but if you supply the right default location it would save you the bother of constantly changing the location code.

Ultrasound

Similar to X-Ray. If the doctor performs diagnostic ultrasound and bills the Technical component then this field is set to Y. If the doctor performs diagnostic ultrasound and only bills the interpretive component then this field is set to N. If the doctor performs both technical and interpretive components then this field is set to B for Both. This field can be left blank if the doctor bills only interpretive component or does not bill Ultrasound.

Default Service

The Default Service is designed to speed your billing process. A "Default" is what the computer will supply when no information is provided. For a GP the Default Service is 005B. When you are billing just press the enter key on the first service line and Navicert will enter the default service code. If you select the right default service it will speed up your billing process and you won't have to type the service code.

GST

Used mainly by massage therapists. Enter your GST number in this field. It is used on invoices.

PST

Used mainly by Massage Therapists. Enter your PST number in this field.

MTAS

Used by Massage Therapists. Enter your MTAS association number here.

DVA

Used mainly by Chiropractors and Massage Therapists. Enter your Department of Veterans Affairs billing number here.

SGI

Used by Chiropractors and Massage Therapists. This field contains the Saskatchewan Government Insurance payee number. Contact the Chiropractors Association of Saskatchewan for assistance in applying for and obtaining an SGI payee number.

Position Cursor in Referring Doctor Field

Foreign certified specialists will bill either a 9B or another code such as 9L when they see referred patients. If the majority of patients the doctor sees are referred you should click on this check box so the cursor on the billing screen will position in the Referring Doctor spot. This will save you the bother of constantly moving the cursor up one line every time you want to enter a referring doctor.

Section VI

Messages

ERM9										
Aj	ppointments	γ	Electronic	Medical Re	cords		Word Processing	γ	Utilities	Messages
Use	ers - Double C	lick to Se	nd Message				Double Click to Vi	ew Message	B	
Terminal	User		Status	^	Date	Time	From	Read	Subject	^
TERM1	SERVER PILLING DESK	OnLine		_	Feb 20, 2007	03:37 pm		Yes		- 11
TERM3	FRONT RECEPT	OnLine		_	5an 04, 2007	00.20 pm		165		-
TERM5	LAPTOP	OnLine								
TERM6	BACK RECEPTIC	OnLine				0				
TERM8	TYPIST	OnLine			-	4				-
				-6						
	-			_						
	-					4				
						2				_
				_		13 1				-
				~						~
From:						Eror	n:			
To:	<u> </u>					To				
Fubioct	-					Pub	inst			
Subject.	1			_		300	jeci.			
				~					<u>^</u>	
1						I.				
ſ										
	<u>S</u> end	1 Var	Clear				<u>Reply</u>	Delei	te	

Note: The message system needs to know who you are to find your messages and it needs to know who you are to tell other people who sent the message. For that reason, you can not use the message system when you have user log-in disabled.

The message system allows you to send messages from one terminal to another on your local network. When you click the Messages tab you will see a list of all terminals on the left side of the screen. You can send a message by double clicking on the terminal you wish. When you do that you will be able to enter a subject and a message. Once finished click SEND.

From:	LAPTOP	
To:	FRONT RECEPTION	
Subject:	Please bring me the Peterson File	
when you are i	inished please bling hie the neterson nile	
		~
		~
4	Send Clear	>

The right side of the screen displays your message history.

		Double Clic	k to View Mes	sage	
Date	Time	From	Read	Subject	^
Jan 18, 2007	08:11 am	BILLING DESK	Yes	COFFEE TIME	
Jan 16, 2007	03:53 pm	BILLING DESK	Yes	TESTING	
					~
	Fro To: Sub	n:			
		the Bei	oly 😣		

You can view any message by clicking on it.

Once you have selected a message, you can reply to it or you can delete the message.

When you receive a message from another terminal you will see:

🖻 Message Alert		
F		
From:	LAFTOF	
To:	LAPTOP	
Date:	Mar 04, 2007-07:50 pm	
Subject:	Coffee Time?	
	Sounds	
Reply Exit		

When a message appears you will also hear a sound played provided you have speakers on your computer. While this is useful to bring your attention to the screen you may find it distracting. If so, click the "Do Not Play Sounds" box and the system will stop playing alert tones.

The system plays small sound files called WAV files. These files are located in the Navicert folder under the MAIL directory. You can listen to the sounds by double clicking on them. If you wish, you can delete any unwanted sounds from this folder and it will no longer be played.

Once you have reviewed your message you can click the Reply button or the Exit button.