eCW Training: Case Manager

The Case Manager function in eCW allows users to associate insurance per encounter. This function is very helpful when dealing with patients who have commercial insurance as well as an active work comp claim, multiple work comp claims, a separate DME claims address, or encounters where insurance cannot be billed.

When should I use the Case Manager function?

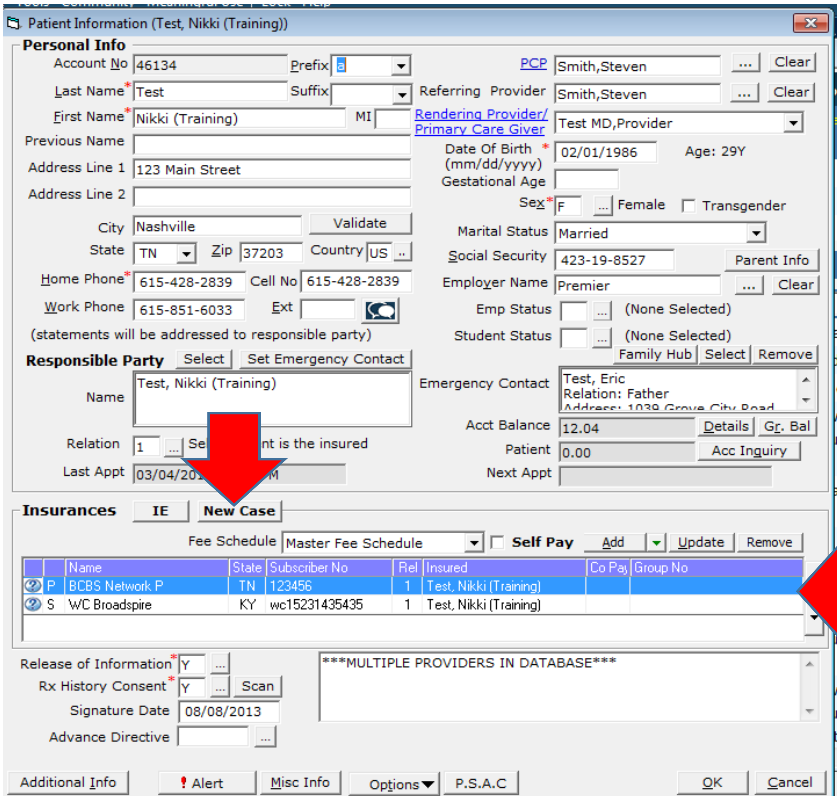
Example 1 – Health Insurance/Work Comp
Patient John Test has two plans that should be billed for separate encounters. His commercial BCBS plan should be billed for most encounters, but he also has a work comp plan that should be billed specifically for encounters related to his left knee injury. Both plans are listed in the patient's chart as active. Without using Case Manager, eCW will associate both plans to each encounter. With the Case Manager function, though, we can associate a plan to each encounter so that John's charges are billed appropriately.

Example 2 – Insurance/Bill to Patient
Patient Linda Test has insurance coverage, but for some office encounters, the treatment provided is not covered by insurance. For these visits we should apply all charges to the patient. By using the Case Manager function, we can apply "bill to patient" to specific encounters so that all charges on that visit will not be billed to the insurance plan.

Example 3 – DME
Patient Betty Test has insurance coverage, but her particular plan requires that DME charges be billed separately to a different plan name/claims address. For these patients we can add the main insurance into the patient's chart as well as the DME ONLY plan. We can then utilize the Case Manager function to apply the correct plan to the correct visit (requires one visit for the office encounter and a separate visit for the DME charges).

Using Case Manager:

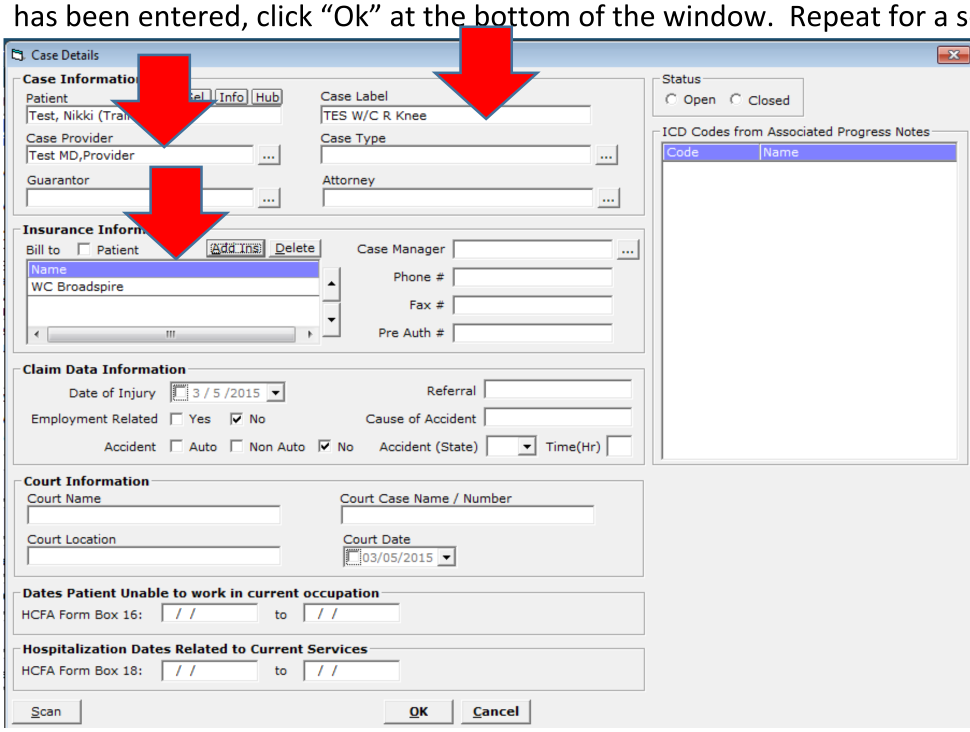
1. From the Patient Info screen, click the “New Case” button.



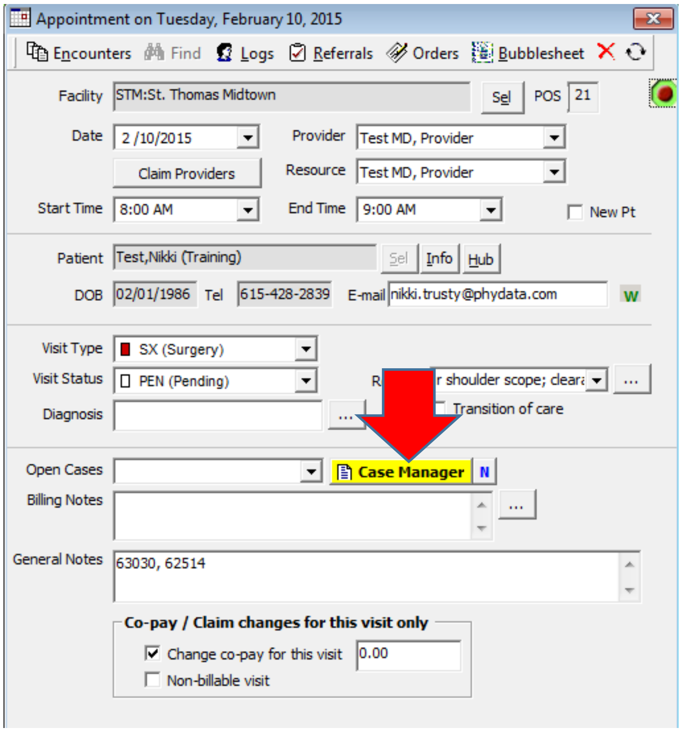
Notice in this example we have two insurances, one commercial and one Work Comp.

2. Once the New Case window opens, create your Case Label. Label names should be in the following format: Practice Initials+Insurance Abbreviation+Body Part (if applicable)

   Enter the Case Provider and choose an insurance or select “Bill Patient”. Note there are several other fields that can be utilized but are not required in order for Case Manager to work. Once all information has been entered, click “Ok” at the bottom of the window. Repeat for a second case, if needed.

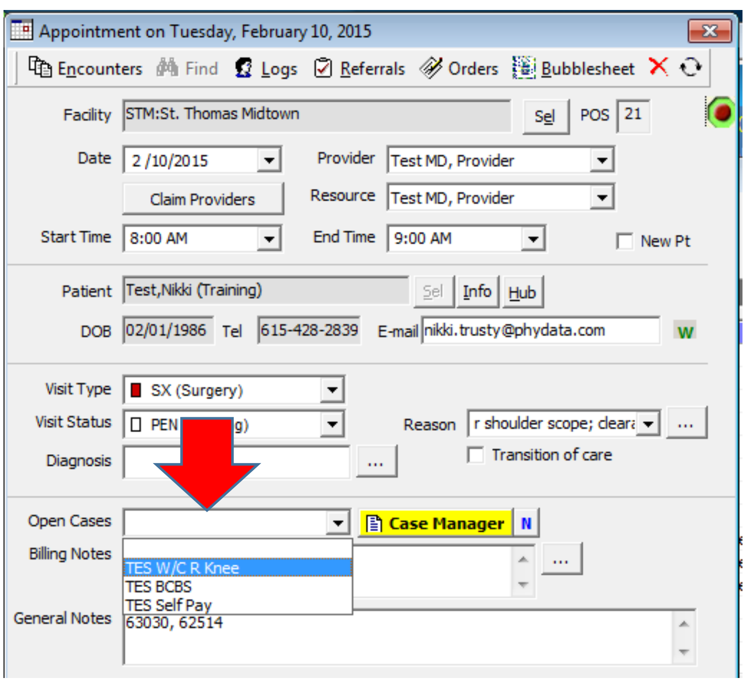


3. From the patient's appointment window, the Case Manager field will now be highlighted in yellow. This alerts the user that we have an open case(s) for this patient. When checking in a patient with a yellow Case Manager button, staff should **ALWAYS** apply the correct insurance to the encounter.



4. Choose the appropriate case from the drop-down. After the case has been selected, user can click the yellow "Case Manager" button to also view the case details and/or edit the case.

NOTE: Opening the Case will also allow the user to choose the "close" option once a specific plan should no longer be utilized, such as when commercial plans are terminated or work comp claims are closed.



5. Notice the view from the Progress Note window after a case has been applied. The Patient Dashboard still shows “BCBS” in the Insurance field since this is technically still listed as the primary plan. However, the note itself now shows “WC Broadspire” since this is the plan we applied to the encounter with Case Manager.