

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.

Personal Info

Account No 46134 Prefix [B] PCP Smith,Steven Clear

Last Name* Test Suffix Referring Provider Smith,Steven Clear

First Name* Nikki (Training) MI Rendering Provider/Primary Care Giver Test MD,Provider

Previous Name

Address Line 1 123 Main Street Date of Birth* 02/01/1986 Age: 29Y

Address Line 2 Gestational Age

City Nashville Validate Sex* F Female Transgender

State TN Zip 37203 Country US Marital Status Married

Home Phone* 615-428-2839 Cell No 615-428-2839 Social Security 423-19-8527 Parent Info

Work Phone 615-851-6033 Ext Employer Name Premier Clear

(statements will be addressed to responsible party) Emp Status (None Selected)

Student Status (None Selected)

Responsible Party Select Set Emergency Contact

Name Test, Nikki (Training) Emergency Contact Test, Eric

Relation 1 Select Patient is the insured Relation: Father

Last Appt 03/04/2013 Address: 1038 Grove City Road

Acct Balance 12.04 Details Gr. Bal

Patient 0.00 Acc Inquiry

Next Appt

Insurances IE **New Case**

Fee Schedule Master Fee Schedule Self Pay Add Update Remove

Name	State	Subscriber No	Rel	Insured	Co Pay	Group No
P BCBS Network P	TN	123456	1	Test, Nikki (Training)		
S WC Broadspire	KY	wc15231435435	1	Test, Nikki (Training)		

Release of Information* Y Scan

Rx History Consent Y Scan

Signature Date 08/08/2013

Advance Directive

Additional Info Alert Misc Info Options P.S.A.C OK Cancel

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.

Case Details

Case Information Patient Info Hub

Patient Test, Nikki (Training)

Case Label TES W/C R Knee

Case Provider Test MD,Provider Case Type

Guarantor Attorney

Insurance Information Bill to Patient Add Ins Delete Case Manager

Name WC Broadspire Phone #

Fax #

Pre Auth #

Claim Data Information Date of Injury 3 / 5 / 2015 Referral

Employment Related Yes No Cause of Accident

Accident Auto Non Auto No Accident (State) Time(Hr)

Court Information Court Name Court Case Name / Number

Court Location Court Date 03/05/2015

Dates Patient Unable to work in current occupation HCFA Form Box 16: / / to / /

Hospitalization Dates Related to Current Services HCFA Form Box 18: / / to / /

Scan OK Cancel

- 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.

The screenshot shows the 'Appointment on Tuesday, February 10, 2015' window. The 'Open Cases' dropdown menu is open, and the 'Case Manager' button is highlighted in yellow. A red arrow points to this button. The patient information includes 'Test, Nikki (Training)' with DOB '02/01/1986'. The visit type is 'SX (Surgery)' and the status is 'PEN (Pending)'. The reason for the visit is 'r shoulder scope; dea...'. The 'Co-pay / Claim changes for this visit only' section shows 'Change co-pay for this visit' checked with a value of '0.00'.

- 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.

The screenshot shows the same appointment window as above, but with the 'Open Cases' dropdown menu open. A red arrow points to the dropdown menu. The dropdown menu is open, showing a list of cases: 'TES W/C R Knee', 'TES BCBS', and 'TES Self Pay'. The 'Case Manager' button is still highlighted in yellow. The patient information and visit details are the same as in the previous screenshot.

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.

The screenshot displays a medical software interface with the following components:

- Progress Notes Header:** "Progress Notes" with a dropdown arrow.
- Patient Dashboard:** A header for "Test, Nikki (Training), 29 Y, F" with tabs for "Sel", "Info", "Hub", "Allergies", and "Alert".
- Patient Information:** Address: 123 Main Street, Nashville, TN 37203; Phone: 615-428-2839; Email: nikki.trusty@phydatz.com.
- Insurance Information:** Wt: 02/12/15: 135 lbs.; Appt(L): 03/04/15(JB); PCP: Smith; Language: English; Translator: No; Ins: BCBS; Acc Bal: \$12.04; Guar: Nikki; Gr Bal: \$12.04; Ref: Smith; Ren: Test MD.
- Buttons:** "CLICK TO EDIT" (CD in office Oncologist), "SECURE NOTES", and "Settings".
- Navigation Bar:** Medical Summary | CDSS | Alerts | Labs | DI | Procedures | Growth Chart | Imm/T.Inj | Encounters | Patient Docs | Flowsheets | Notes.
- Progress Note Content:** Includes "Patient" details (DOB: 02/01/1986, Age: 29 Y, Sex: Female), "Phone", "Address", "Account Number", "PCP", "Encounter Date", "Provider", and "Appointment Facility".
- Subjective Section:** "Chief Complaint(s)", "HPI", "Current Medication", and "Medical History".
- Footer:** "Send", "Print", "Fax", "Record", "Lock", "Details", "Scan", "Templates", "Claim", "Letters", "Ink", and a refresh icon.

Two red arrows highlight the insurance information: one points to "BCBS" in the patient dashboard, and the other points to "WC Broadspire" in the progress note's "Primary Insurance" field.