

SHRINKRAPTTM

Manages your practice, maintains your sanity.



Demo

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ShrinkRapt® 2018.0 Demo Manual

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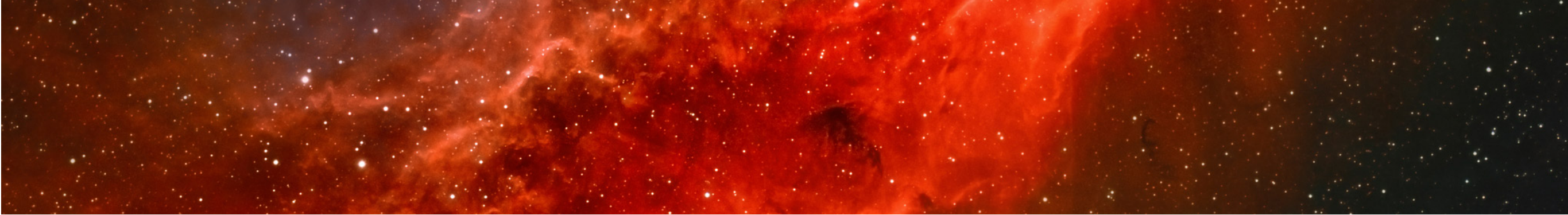
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Saint Charles, IL 60175



Welcome

Welcome to ShrinkRapt 2018!

Thank you for your interest in ShrinkRapt™ 2018. In this manual you will learn how to use ShrinkRapt to keep a complete patient EMR, enter billing information, prepare patient statements and submit insurance claims.

ShrinkRapt 2018 creates an electronic claim file and completes the CMS paper form. ERAs (Electronic Remittance Advice) can be imported directly into ShrinkRapt. The importing and auto posting of ERAs to patient accounts is a huge time and money saver.

At Saner Software we understand the needs of today's small medical/therapy office. We have provided billing and insurance software for over 25 years and have listened carefully to our many customers to improve ShrinkRapt and stay in touch with the rapidly changing requirements of insurance companies.

Lets get started learning about ShrinkRapt. We begin with a description of the ShrinkRapt™ Demo program and how to use the manual. There is lots of information in this manual so feel free to jump around and only look at the information you need to confidently decide that ShrinkRapt is a good choice for your practice.

Michael K. Johnson, President

Saner Software Inc.

PS - Please email me directly if you have any questions. My email address is mike@sanersoftware.com. I hope to hear from you soon!

About The ShrinkRapt 2018 Demo

The ShrinkRapt Demo program is a complete version of the ShrinkRapt program. We have entered 12 patient records and you can enter a few of your own.

This manual focuses on keeping a complete electronic medical record (EMR), creating patient billing statements and preparing insurance claims for paper or electronic submission.

How To Use This Manual

This manual is divided into chapters and sections that provide instructions and discuss specific features of the program such as keeping a comprehensive electronic medical record, preparing billing statements, and submitting insurance claims.

The first page of each chapter describes the chapter content. On the first page of each section, you will find simple steps to accomplish a specific task. These steps do not address every screen or dialog that may appear on your computer so you will want to also pay attention to what is occurring on your screen. The section text will go into varying degrees of an in-depth description of the topic and is often combined with screen shots from the program.

Links

Colored text is used to let you know that clicking on the word or words will take you to another location in the book, open your email program or take you to a designated web address.

Images

Touching or clicking on a small image will cause it to expand into a larger image for easier viewing.

Videos Links

Whenever you see this YouTube icon, it means there is a video tutorial available on the ShrinkRapt YouTube Channel for the topic.



Help Tips

Holding the cursor over a field in the ShrinkRapt program will display help messages that explain what to enter and/or how the information is used by ShrinkRapt

CMS Insurance Form References

Throughout the manual we will reference boxes on the CMS 1500 insurance claim form. They will be referred to as CMS box and then the appropriate number. Each CMS box referenced will be included in the glossary with a description of how the box is used by insurance companies. The glossary index is a great place to locate areas of this manual that describe how ShrinkRapt completes boxes on the CMS form. If CMS Box is in bold letters, the words are linked to the glossary and clicking on the text will take you to the glossary.

NOTE: Signifies a tip, suggestion, or general note.

About The PDF Version

Some features that are available in the eBook version of the manual will not be available in the PDF version. If you have an iPad, the manual is best viewed on the iPad.

About Support

Knowing that professional assistance is just an email away is a valuable part of your buying decision. At Saner Software we pride ourselves in being able to quickly and efficiently answer your questions using email.

Technical support is free, there are no annual or monthly fees.

Throughout the year we release free updates that will fix problems that were discovered and/or add new features to the current version. If a free update is available to download, you will be notified when opening ShrinkRapt.

Technical support is available from 8:30 AM to 4:30 PM central time Monday through Friday.

All support and sales of the ShrinkRapt program is done by email. You may ask questions by sending an email message to TechSupport@SanerSoftware.com.

Email is a very efficient way to ask questions, and is the best method of receiving technical assistance. You never have to wait on hold, you can simply ask your question and move on to doing something else, keeping an eye on your email for a response. Because all support is done by email, it is where we focus our time and as a result, most emails are answered within a few minutes.

Video Help and Tutorials

Our video tutorials are an excellent way to receive technical support in an audio visual format. Visit the [ShrinkRapt YouTube Channel](#) to see the videos currently available.



Saner Software maintains a mailing list to keep you up to date with what's happening with ShrinkRapt. If you have not already signed up, click [here](#) to signup now.

System Requirements

Windows

- Intel© CoreDuo or above
- Windows 7 or higher
- 4GB RAM, 8GB Recommended
- 1280x1024 minimum screen resolution

Mac OS

- Intel© CoreDuo or above
- Max OS X 10.9.5 or higher (Mavericks)
- 4GB RAM, 8GB Recommended
- 1280x1024 minimum screen resolution

Lets Get Started

In this chapter you will learn how to download and install the ShrinkRapt Demo program.

Macintosh installation instructions can be found in [Section 1](#).

Instructions for Windows users can be found in [Section 2](#).

Installing On A Macintosh

QUICK STEPS



1. **Click here** to go to the ShrinkRapt Demo download web page (Figure 1.1).
2. Click the Download Now button.
3. Click the Downloads icon in the upper right hand corner of your browser. 
4. Double click the ShrinkRapt 2018 demo.dmg to display the installer window. 
5. Drag the ShrinkRapt 2018 Demo folder to the applications folder.
6. Double click the Applications folder icon.
7. Double click the ShrinkRapt program icon.
8. If a dialog box appears asking you to select a data file, click the Open button, choose Demo Data from the list and click Open.

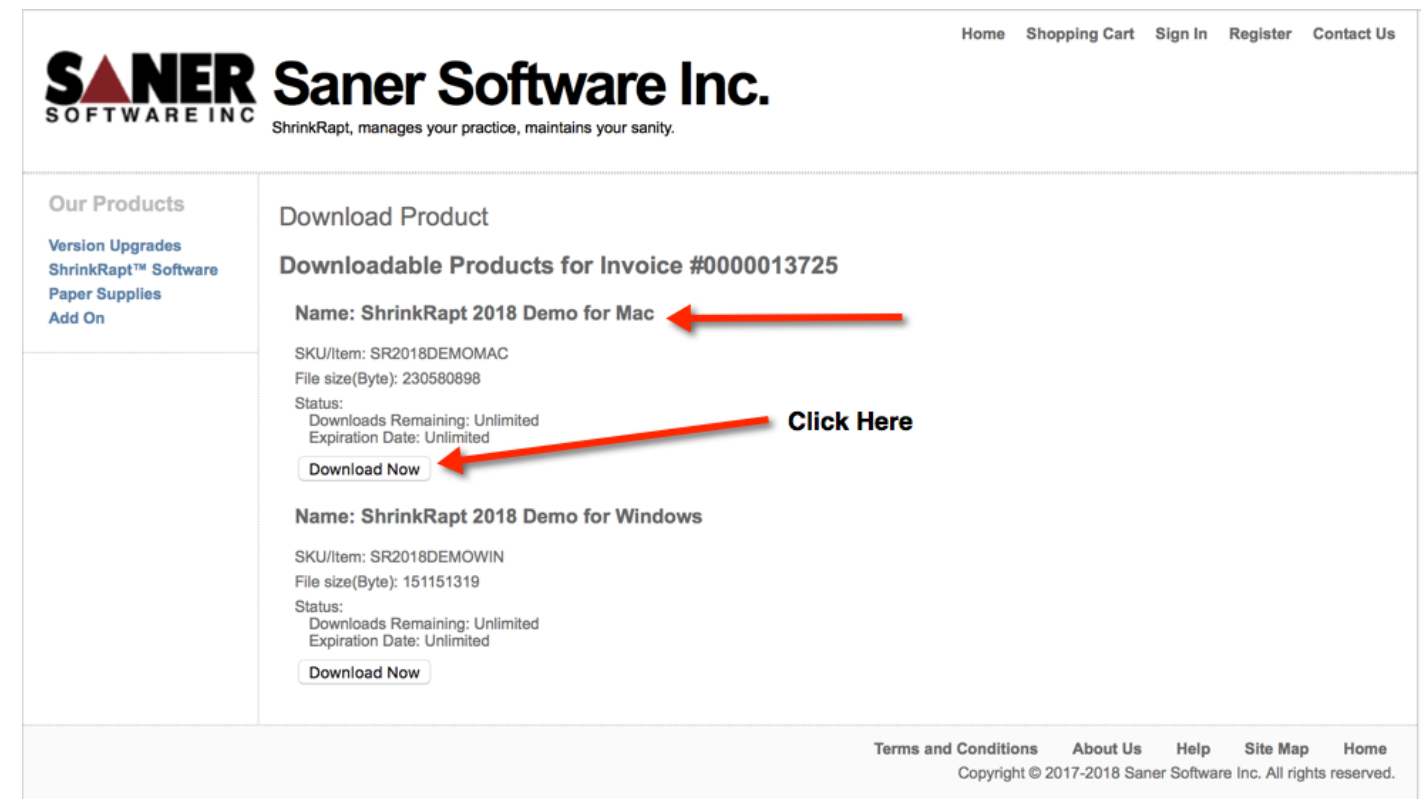
If you would like to watch a video of the installation process, **click here**.

To install the ShrinkRapt Demo program, follow the steps provided on the left or below to install it on your Macintosh computer now. If you have already downloaded and installed the demo, go to Chapter 2, the **Patient List**.

If you would like to watch a video of the installation process, **click here**.

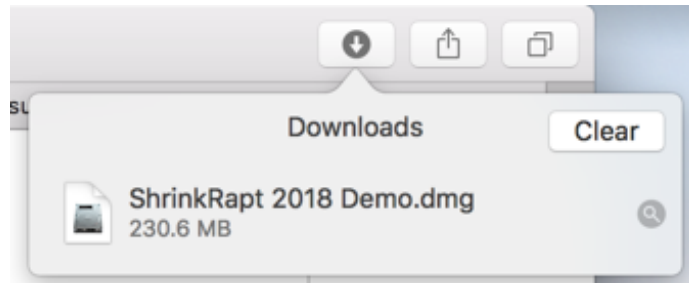
1. **Click here** to go to the ShrinkRapt Demo download web page.
2. Click the Download Now button below the Macintosh Demo choice.

Figure 1.1 Mac Demo Download Page



- Click the Downloads icon in the upper right hand corner of your browser.
- Double click on the ShrinkRapt 2018 demo.dmg to display the installer window

Figure 1.2 Browser Downloads Button



- Drag the ShrinkRapt 2018 folder to your applications folder.

Figure 1.3 ShrinkRapt Installer



- Double click the Applications folder as shown in figure 1.3 and locate the ShrinkRapt 2018 Demo folder.

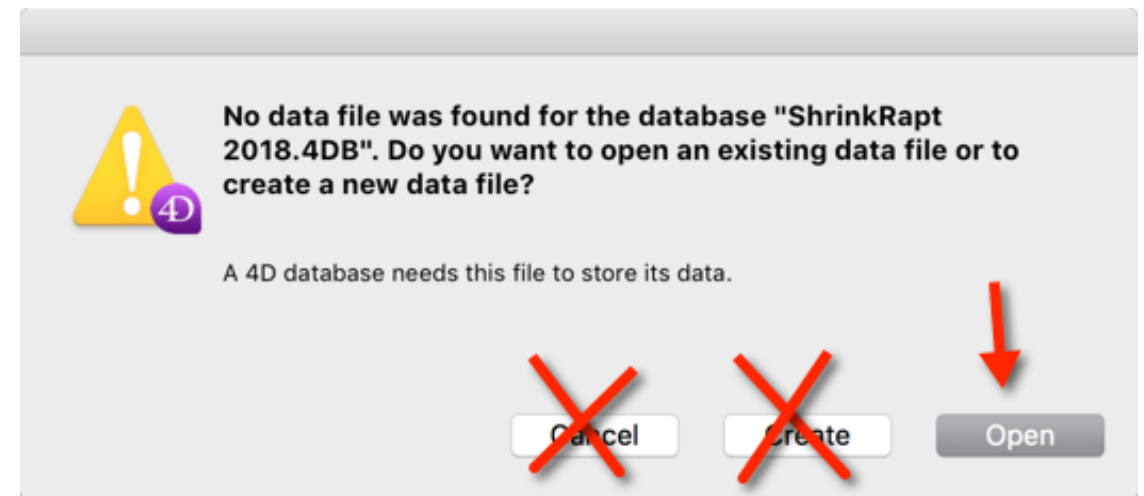
- Double click on the ShrinkRapt program icon (figure 1.4).

Figure 1.4 Program Icon



- If the dialog box shown in figure 1.5 appears, click the Open button, choose Demo Data from the list that appears and click Open. If it does not appear, skip to the next step.

Figure 1.5 Open Data File Dialog



- Choose if you want to view the demo as a solo practitioners of a multi practitioner office (figure 1.6).

The



The

The

The

Installing On Windows

QUICK STEPS



1. **Click here** to go the ShrinkRapt Demo download web page (Figure 1.8).
2. Click the Download Now button below the Windows Demo choice.
3. When the download is complete, there will be a file titled ShrinkRapt Demo Installer on your computer. Depending on the browser you are using, the file may be displayed at the bottom of the browser window.
4. Double click on the installer icon. The window shown in figure 1.9 will be displayed.
5. Click the Next button and follow the on-screen instructions.
6. If a dialog box appears asking you to select a data file, click the Open button, choose Demo Data from the list, and click Open.

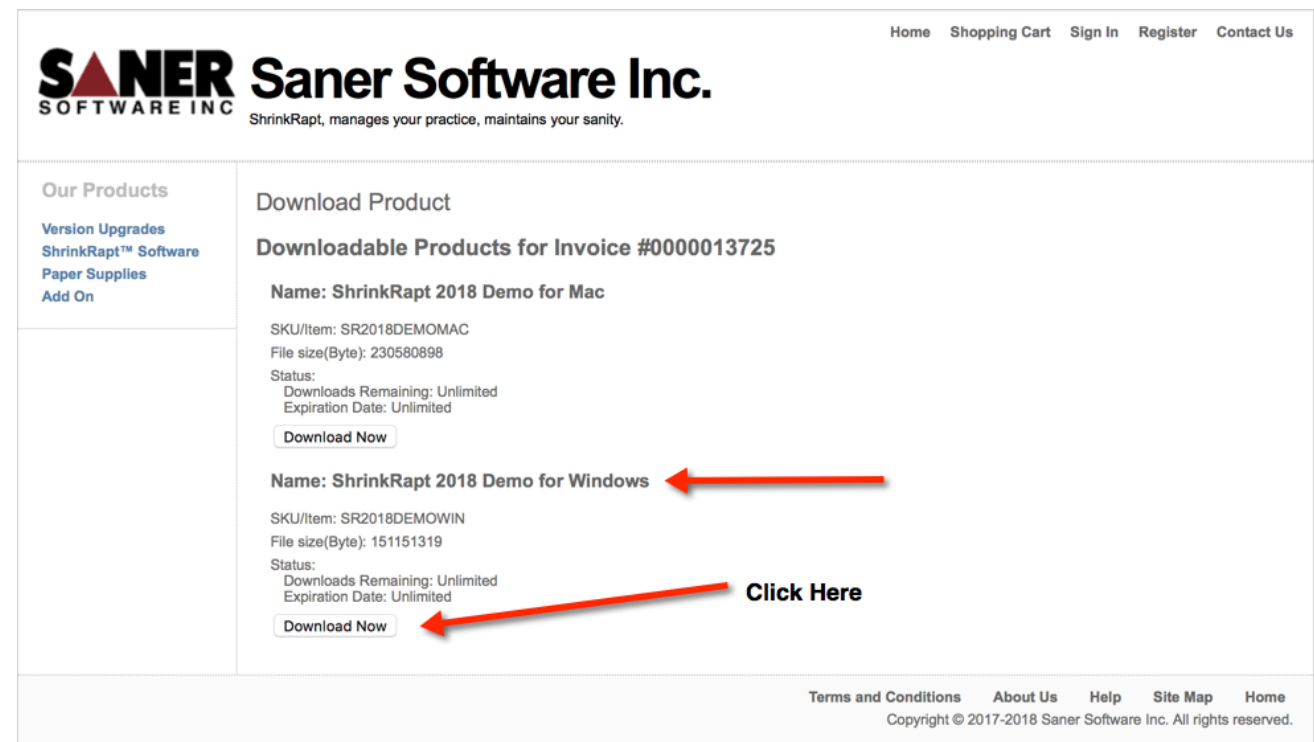
If you would like to watch a video of the installation process, **click here**.

To install the ShrinkRapt Demo program, follow the steps provided on the left or below to install it on your Windows computer now. If you have already downloaded and installed the demo, go to Chapter 2, the **Patient List**.

If you would like to watch a video of the installation process, **click here**.

1. **Click here** to go to the ShrinkRapt Demo download web page.
2. Click the Download Now button below the Windows Demo choice.

Figure 1.8 ShrinkRapt Demo Download Web Page



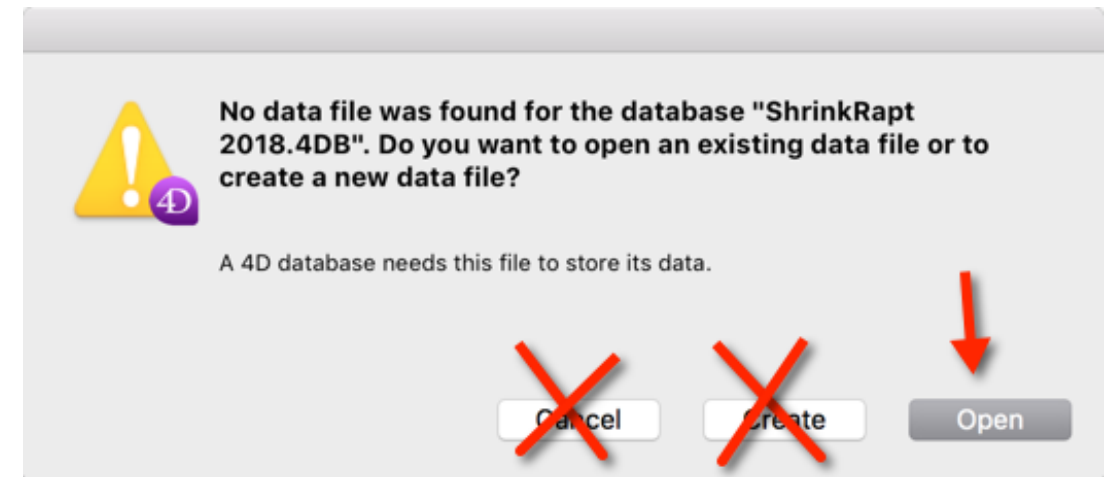
3. When the download is complete there will be a file titled ShrinkRapt Demo Installer on your computer. Depending on the browser you are using the file may be displayed at the bottom of the browser window.
4. Double click on the installer icon. The windows shown in figure 1.9 will be displayed.
5. Click the Next button and follow the on-screen instructions.

Figure 1.9 Windows Installer Window



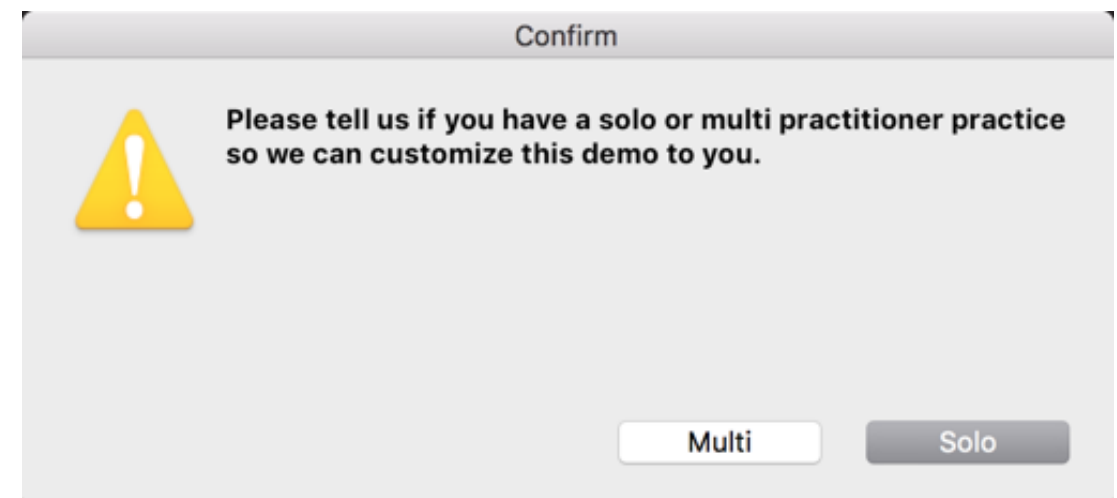
6. If a dialog box appears asking you to select a data file, click the Open button.

Figure 1.10 Open Data File Dialog Box



7. Choose Demo_Data from the list of files displayed and click Open.
8. Click Solo or Multi to select the mode you will like to use for using the demo.

Figure 1.11 Choose Solo Or Multi Dialog Box



The Patient List will appear as show in figure 1.12, In the next chapter we will discuss how to use the Patient List to bill patients, prepare insurance claims, record treatment plans, enter visit notes and more.

Figure 1.12 Patient List

Name	Last Visit	Home	Cell	Responsible Party	Ttl Balance	Insured
Abby, Fred W.	03/14/18		(708) 555-6598	Abby, Fred W. - \$1,845.00	\$1,845.00	Y
Burnett, Brooke	02/24/18		(708) 555-4913	Burnett, Jerry - \$260.00	\$260.00	Y
Cencio, Rigoberto H.	02/24/18		(708) 555-9636	Cencio, Rigoberto H. - \$170.00	\$170.00	
Dogherty, Howard	02/24/18		(708) 555-3579	Dogherty, Howard - \$85.00	\$85.00	
Farnes, Ken	09/10/17		(708) 555-4466	Farnes, Ken - \$170.00	\$170.00	
Masterson, Gail S.	08/13/17	(708) 555-7793	(312) 555-6340	Masterson, Gail S. - \$180.00	\$180.00	
Ramsey, Bill	02/24/18		(798) 555-3359	Ramsey, Bill - \$95.00	\$95.00	
Rook, Curtis F.	09/10/17		(708) 555-6315	Rook, Curtis F. - \$570.00	\$570.00	Y
Scruggs, James	12/01/17		(708) 555-0381	Scruggs, James - \$475.00	\$475.00	Y
Shire, Susan	09/06/17		(708) 267-7296	Shire, Susan - \$85.00	\$85.00	Y
Smith, Buster	09/06/17		(708) 555-9999	Smith, Jonathan - \$135.00	\$135.00	Y
Terry, Michael M.	08/29/17	(708) 555-4604	(708) 555-6818	Terry, Michael M. - \$85.00	\$85.00	

Patient List

In this chapter we discuss the Patient List and all you can do from this window. The buttons that border the Patient List provide a quick and easy way to handle practice paperwork.

You should now be viewing the Patient List. If you have accidentally closed the Patient List, choose Home from the Navigation menu to open it now.

After you are done playing, continue to chapter 3 where you will learn how to enter a patient record of your own.

Figure 2.1 Patient List

The screenshot shows the EMR software interface with several red arrows pointing to specific features:

- Calendar:** Points to the top-left calendar icon showing January 9th.
- Search Bar:** Points to the search bar at the top.
- Navigation Icons:** Points to the row of icons below the search bar, including a person icon, a folder icon, a umbrella icon, a red flag icon, a factory icon, a car icon, and a red circle with a white 'X' icon.
- EMR Tab:** Points to the 'EMR' tab in the top navigation bar.
- Orgs Tab:** Points to the 'Orgs' tab in the top navigation bar.
- Reports Tab:** Points to the 'Reports' tab in the top navigation bar.
- Mail Tab:** Points to the 'Mail' tab in the top navigation bar.
- Deactivate Tab:** Points to the 'Deactivate' tab in the top navigation bar.
- Delete Tab:** Points to the 'Delete' tab in the top navigation bar.
- Report Tab:** Points to the 'Report' tab in the top navigation bar.
- Labels Tab:** Points to the 'Labels' tab in the top navigation bar.
- Print Tab:** Points to the 'Print' tab in the top navigation bar.
- Bill Tab:** Points to the 'Bill' tab in the left sidebar.
- Add Tab:** Points to the 'Add' tab in the left sidebar.
- Codes Tab:** Points to the 'Codes' tab in the left sidebar.
- See list of ICD and CPT Codes:** Points to the text 'See list of ICD and CPT Codes' in the bottom right area.



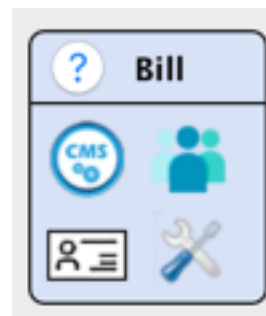
List Views

There are seven list views that can be displayed. When you click on one of the icons in the list area, the list of people will change. From left to right, the list views are patients, patients and responsible parties, insurance policy holders, people with active alerts, people who will soon have a birthday, households and deactivated patients/responsible parties.

Go ahead and click on each of the icons in this area now and see how the list changes. If you double click on a name in the list, the complete record for the person will be opened.

Bill

The Bill area is where you will go to print or email patient statements and insurance claims. ShrinkRapt is setup to bill Agencies for multiple patients and the business card icon is what you will use to bill Agencies. Click on the icons now to see what happens. How to use each of the lists will be explained in later chapters.



Add

Adding new patients, visits, payments and downloading ERAs is done from this area of the Patient List. To add a new visit, highlight a patient name in the list and click the Visit button.

We have setup 12 Patient records and you can enter several of your own. In the next chapter we will discuss in detail how to add a patient record.



Codes

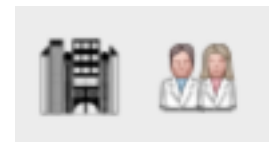
ShrinkRapt comes with a complete list of ICD 10 codes that has been organized by chapter. To see the list of codes, click the ICD button.

ShrinkRapt comes with a limited number of CPT codes but also provides the ability to enter and or import new codes as you need them. The AMA sells the complete list of codes and that can be imported to ShrinkRapt.



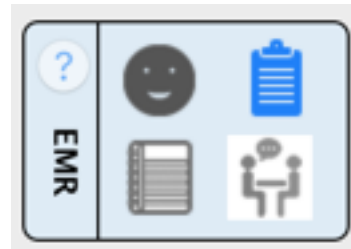
Practice and Practitioner

These two icons, located in the lower left hand corner of the Patient List, take you to the information you have entered about you, the practitioner and your practice. This is where you will add your address, your NPI number, and other relevant information. In this demo version you will not be able to change the practice name or the practitioner name.



EMR - Electronic Medical Record

The EMR area is where you will go to view visit notes, print a face sheet, review treatment plans and look at the patients medical history. To view notes or treatment plans for a specific person in the list, highlight a name before clicking the button.



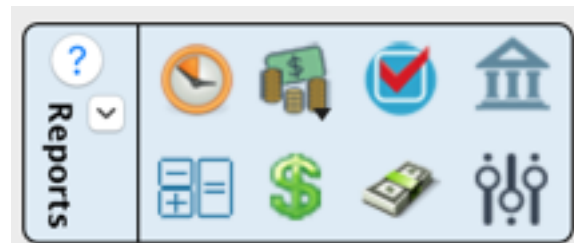
Orgs

Organizations include lists of insurance companies, employers, agencies and referral sources. Click the umbrella icon to see the insurance company list. Be sure to checkout all the information provided in the list. Click the graph button at the top of the list to see a pie graph of visits by insurance company.



Reports

There are many reports in ShrinkRapt that will help you keep track of billing information and practice results. Click the downward pointing arrow next to the Reports label to display a list of additional reports.

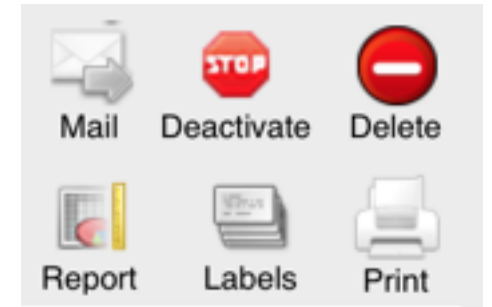


Mail

Patients can be emailed from within ShrinkRapt. When emails are sent using ShrinkRapt, a copy of the email is saved with the patient record.

Deactivate

Patient records can be deactivated so their name no longer appears on the active Patient List. If they return at a later date, it's easy to reactivate the record and put them back on the patient list.



Report

The custom report editor allows you to design reports that have the specific information you want in a report.

Labels

The mailing label feature lets you have complete control to create mailing labels with the size and font you like.

In the chapters that follow you will learn how to add a patient record and enter the information necessary for ShrinkRapt to record a visit, print a statement and prepare an insurance claim.

Patient Records

This chapter will explore the patient electronic health record in detail. Each section describes a page of the record. Information entered here will be used to automatically fill out entry windows when you record visit and payment information. It will also be used to prepare billing statements and complete insurance forms.

Adding A Patient

QUICK STEPS

1. Click the Patient button located in the Add grouping on the left side of the Patient List.
2. Enter information about your patient on the Address page (Figure 3.1).

We have made setting up patient records easy by providing pop-up choice lists, automatically capitalizing information if you forget, and looking up the names of insurance companies. Patient records can be imported from other billing programs making setup faster. Section 11 of this chapter provides detailed instructions for importing patient records. You can also email techsupport@sanersoftware.com for assistance.

Figure 3.1 Patient Entry

NOTE: The Face Sheet button in the EMR area of the Patient List will print the patient electronic health record onto paper.

To print a blank form to use for patient intake, make sure no name is highlighted the list and click the Face Sheet button.

Here are a few things that will speed entering your patient records.

- Have the patient information organized on paper before you begin.
- You may find it helpful to print out the Patient Intake Form and organize your patient information like it is on this sheet.
- The first page of the Patient record displays the patient's name, address, birthday, and other information needed to prepare a billing statement and insurance claim.
- ShrinkRapt has the capacity to store a great deal of patient information, but you only need to enter as much as is required by your practice. You are in charge and you decide what is important to you. As an example, if you do not file insurance for patients, you will not need to enter policy information.
- On the lower right side of this window there is an area where you can record notes and contacts for a patient. This is different from visit notes which we will discuss later. If you send an email to a patient, the email will be stored in this area.

Most of the requested information on the Address page is self explanatory but the following explains other fields.

- **Role** describes the person's role in a family unit. The information is not used in any billing or insurance and is for your reference only.
- **Field 1-2-3** are fields that can be used to keep information about a patient that is specific to your practice. You can change the label for each of these fields in Preferences. As a silly example, you could change the Field 1 label to "Shoe Size" and then enter 9 in the field.

Holding the cursor over a field will display help messages that explain what to enter and/or how the information is used by ShrinkRapt.

The Setup Page

QUICK STEPS

- 1. Click the Setup tab at the top of the Patient record window.
- 2. Enter information.

In the next section we will discuss entering information required to complete the CMS insurance form.

NOTE: The insurance authorization tracking feature helps you keep track of the many demands of managed care companies. Note how ShrinkRapt® automatically counts the number of visits that have been applied to each authorization.

The Setup page shows the patient's default billing information. The information entered on the Setup page of the patient's record will be used to automatically complete a visit record entered for this patient. Of course you can change the information at any time.

Figure 3.2 Patient Record Setup Page

Abby, Fred W.

Address Setup Account Visits CMS Patient Info Policy Medications Treatment Notes History Documents

Practitioner Elliot, Samuel C.

CPT Code	Fee	Modifier	Units	ICD 1	ICD 2	ICD 3	ICD4
1 90834	\$95.00		1	F32.9	F13.15		
2	\$0.00		0				
3	\$0.00		0				

Ttl Fee \$95.00

Payment \$25.00

Adjustment \$0.00

Description Co-Payment

? Responsible Party/Insured Ttl Amt Resp Party Amt

Abby, Fred W.	\$95.00	\$25.00

Add Delete

Place of Service Associates in Family Counseling Code 11

2345 North Michigan St. Charles IL

Authorization Period Allowed Max Used

138540	08/04/17	07/04/18	30	19

Add Modify Delete

Current Authorization 138540

Cancel OK

You can set default amounts for payments, adjustments and fees.

The patient is automatically setup to be the responsible party but you can change who the responsible party is by typing a different name in the responsible party insured area.

ShrinkRapt will handle complex billing scenarios such as multiple responsible parties and policy holders.

CMS Patient Info

QUICK STEPS

- 1. Click the CMS Patient Info tab
- 2. Enter information as you want it to appear on the CMS 1500 form.

In the next section we will discuss entering insurance policy information.

This information entered on this page of the patient record is used to complete **CMS box 6, 8, 10, 10d, 12, 14, 15, 16, 18, and 19**. The CMS column shows where the information you enter will appear on a CMS 1500 form.

Figure 3.3 CMS 1500 Patient Info Page of Patient Record

Abby, Fred W.

AddressSetupAccountVisitsCMS Patient InfoPolicyMedicationsTreatmentNotesHistoryDocuments

Patient Information For CMS 1500 Form

	CMS
Relation to Insured Self	6
Reserved For NUCC	8
Condition Related to ☐ Employment ☐ Auto Accident State ☐ Other Accident	10
Claim Codes (Designated by)	10d
Signature On File ☒ Yes ☐ No	12
Date of Illness Qualifier	14
Other Date Qualifier	15
Unable to Work to	16
Hospital Dates to	18
Additional Claim	19
Lab Charges \$0.00 20	

CancelOK

1. Click the **Policy** tab to go to the policy page of the patient record.
2. Click the **Yes** button and enter the policy information.

You must complete the policy page of the record of the insured if you plan to file insurance for the patient. If the patient is not the insured, do not complete this page in the patient record.

Abby, Fred W.

Address Setup Account Visits CMS Patient Info **Policy** Medications Treatment Notes History Documents

Policy ☒ Yes ☐ No

Form ☒ Send Claim To ☐ Client ☒ Insurance Co.
☒ Signature On File ☒ Accept Assignment

Type ☐ HMO ☐ Exclude From Electronic Claims

Company

Plan Name

Id Number Policy or Group#

Ref No. Resubmission #

Card Image

Zoom

Secondary Policy ☒ Yes ☐ No (Box 9 CMS 1500 Form)

Insured Name

Company

Policy# Group#

Reserved NUCC

Employer

Plan Name

Card Image

Zoom

Cancel OK

Entering The Insurance Company

ShrinkRapt comes loaded with a large list of insurance companies with their payor id number. This demo has only a view insurance companies entered To choose an insurance company from this list, type @ in the Company field on the policy page and press the tab key on the keyboard. This will cause a list of insurance companies to appear (Figure 3.5) where you can select from the list by clicking on a name.

Figure 3.5 Insurance Company Choice List

Insurance Company List					
Name	Payor ID	Address	City	St	Archived
Aetna	60054				☐
Aetna Affordable Health Choices	57604				☐
Aetna Better Health PA Medicaid	23228				☐
Aetna Better Health Connecticut	23225				☐
Aetna Better Health of Kentucky	128KY				☐
Aetna Better Health of Louisiana	128LA				☐
Aetna Better Health of Michigan	128MI				☐
Aetna Better Health of Missouri	128MO				☐
Aetna Better Health of Nebraska	42130				☐
Aetna Better H...of New Jersey	46320				☐
Aetna Better Health of New York	34734				☐
Aetna Better Health of Ohio	50023				☐
Aetna Better Health of Virginia	128VA				☐
Aetna Better H...f West Virginia	128WV				☐

Create

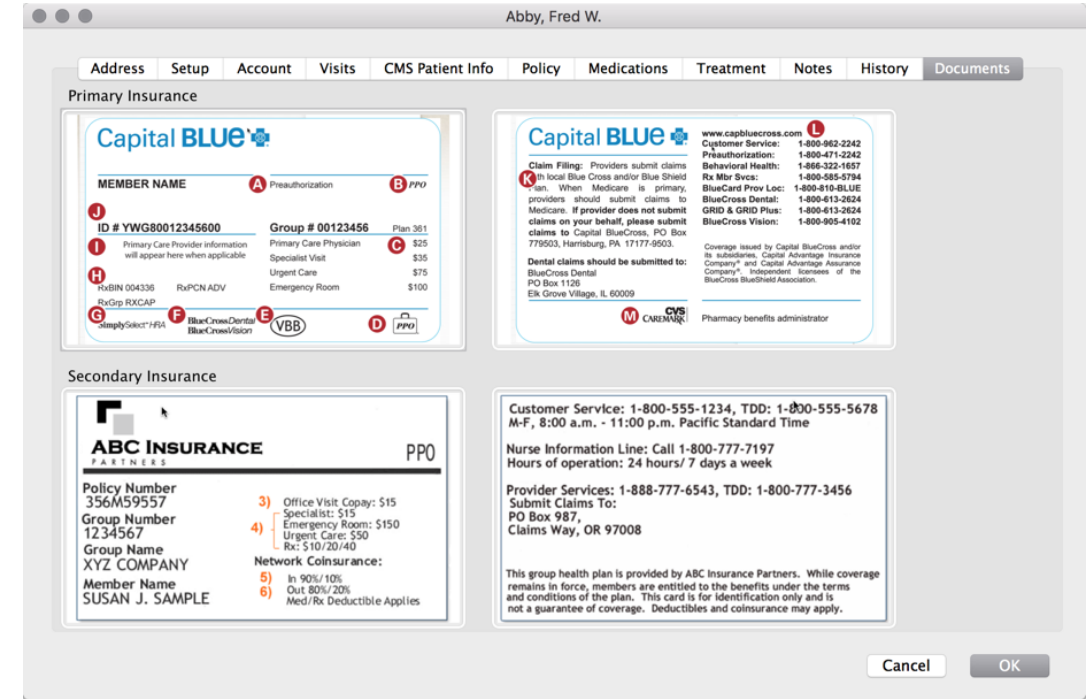
Show All

Cancel

Adding Insurance Card Image

You can use a scanner to get an image of the patient’s insurance card. Copy and paste the image into the card image area on the policy page of the insured’s record. Click the Zoom button to view a larger image (Figure 3.6). A scan of the back of the insurance card can be pasted on the insurance card zoomed page.

Figure 3.6 Insurance Card Zoomed



Viewing Transactions

QUICK STEPS

- 1. Click the Account tab at the top of the Patient Record.

In the next section we will discuss entering and viewing medications.

NOTE: ShrinkRapt allows you to specify what portion of a visit fee is the patient's responsibility. With this feature, you can print a patient balance only statement. This type of statement is discussed later in this manual.

The Account page (Figure 3.7) displays a list of fees, payments and adjustments you have entered or that have been added using the import ERAs feature.

ShrinkRapt provides you with a great deal of flexibility when printing billing statements. On the Account page you can tell ShrinkRapt to print or not print a statement for this patient. You can even select a specific statement format. This is an important consideration if you use ShrinkRapt's batch printing feature to print statements. If the Send Statement radio button is set to No, this person will be excluded from the batch printing. You can even enter a personalized message to be printed on this person's statement.

You will use this window to correct payment and adjustment entries, print a list of transactions, and age the balance to quickly see if the account needs special attention.

Figure 3.7 Account Page

The screenshot shows the 'Account' tab for patient 'Masterson, Gail S.'. The interface includes a top navigation bar with tabs: Address, Setup, Account (selected), Visits, CMS Patient Info, Policy, Medications, Treatment, Notes, History, and Documents. Below the navigation bar, there are several settings sections. The 'Display On Screen' section has radio buttons for 'Client Transactions' (selected) and 'All Transactions'. The 'Send Statement' section has radio buttons for 'Yes' (selected) and 'No', and a 'Statement Style' dropdown menu. The 'Transaction Type' section has radio buttons for 'Patient Balance Only' (selected) and 'All Transactions'. To the right, there are input fields for 'Start-up Balance' (\$0.00), 'Date' (00/00/00), and 'Client Portion' (\$0.00). The main area contains a table of transactions with columns: Date, Statement, Claim, Patient, Description, Check #, T, Credit, and Debit. The table lists several transactions, including psychotherapy sessions and payments. At the bottom right, there are 'Totals' for Credit (\$160.00) and Debit (\$340.00), and a 'Balance' of \$180.00. Below the table, there are buttons for 'Modify', 'Delete', and 'Print'. A 'Statement Message' text area is also present. At the very bottom, there is an 'Age Balance' section with a table showing balances for different age groups: Over 90 (\$0.00), 61-90 (\$0.00), 31-60 (\$0.00), and 0-30 (\$0.00). 'Cancel' and 'OK' buttons are at the bottom right.

Date	Statement	Claim	Patient	Description	Check #	T	Credit	Debit
08/13/17		11/09/17	Masterson, Gail S.	Psychotherapy, 45 minutes with patient ar		F		\$85.00
08/13/17			Masterson, Gail S.	Payment	190	P	\$40.00	
08/06/17		11/09/17	Masterson, Gail S.	Psychotherapy, 45 minutes with patient ar		F		\$85.00
08/06/17			Masterson, Gail S.	Payment	174	P	\$40.00	
07/30/17		11/09/17	Masterson, Gail S.	Psychotherapy, 45 minutes with patient ar		F		\$85.00
07/30/17			Masterson, Gail S.	Payment	160	P	\$40.00	
07/23/17		11/09/17	Masterson, Gail S.	Psychiatric diagnostic evaluation		F		\$85.00
07/23/17			Masterson, Gail S.	Payment	152	P	\$40.00	

Totals	
Credit	\$160.00
Debit	\$340.00
Balance	\$180.00

Age Balance	Over 90	61-90	31-60	0-30
	\$0.00	\$0.00	\$0.00	\$0.00

1. Click the Medications tab to go to the Medication page of the patient record.
2. Click the Add button at the bottom of the page to enter a new medication.

On the Medication page of the patient record you can keep track of the patient's pharmacy, the phone number and list of the medications that have been prescribed by either you or other prescribing clinician.

Cencio, Rigoberto H.

AddressSetupAccountVisitsCMS Patient InfoPolicyMedicationsTreatmentNotesHistoryDocuments

Medication

Pharmacy

Phone

Known Allergies

Prescriptions

Date	Medication	Dosage	Refills	Prescribing Doctor

AddModifyDeletePrint

CancelOK

Treatment Plans

QUICK STEPS

1. Click the Treatment tab to go to the treatment page of the patient record.
2. Click the Add button at the bottom of the page to enter a new treatment plan.

In the next section we will discuss entering and viewing medical and social history.

When using ShrinkRapt's treatment plan feature you can enter treatment plans and set alerts to remind you to update the plans as needed. This page also shows a list of ICD codes that have been used in recording visits. If you enter an alert date, ShrinkRapt will display a list of patients and an alert message.

Figure 3.9 Patient Record Treatment Plans Page

Abby, Fred W.

Address Setup Account Visits CMS Patient Info Policy Medications **Treatment** Notes History Documents

Next Report Due 09/30/17 Message
Alert Date 09/24/17

ICD/DSM Codes Used

DSM/ICD Code	Description
F1315	Sedative, hypnotic or anxiolytic abuse w psychotic disorder
F329	Major depressive disorder, single episode, unspecified

Plan List

Date	Plan Title
02/01/18	Stress Management

Add Modify Delete Print Plans

Cancel OK

1. Click the **Notes** tab to go to see a list of visits and the notes you have entered for the patient.

The Notes page of the patient record will display a list of visits, the reason for the visit and the first view characters of the note. Double click on a date in the list to see the complete note.

[illegible]

History

QUICK STEPS

1. Click the History tab.

In the next section we will discuss how stored scanned documents in the Patient's record.

The History page is where you will record information such as reason for seeking treatment, general health, social history and family history.

Figure 3.11 History page of patient record

Cencio, Rigoberto H.

Address Setup Account Visits CMS Patient Info Policy Medications Treatment Notes History Documents

Reason Seeking Treatment

General Health Information

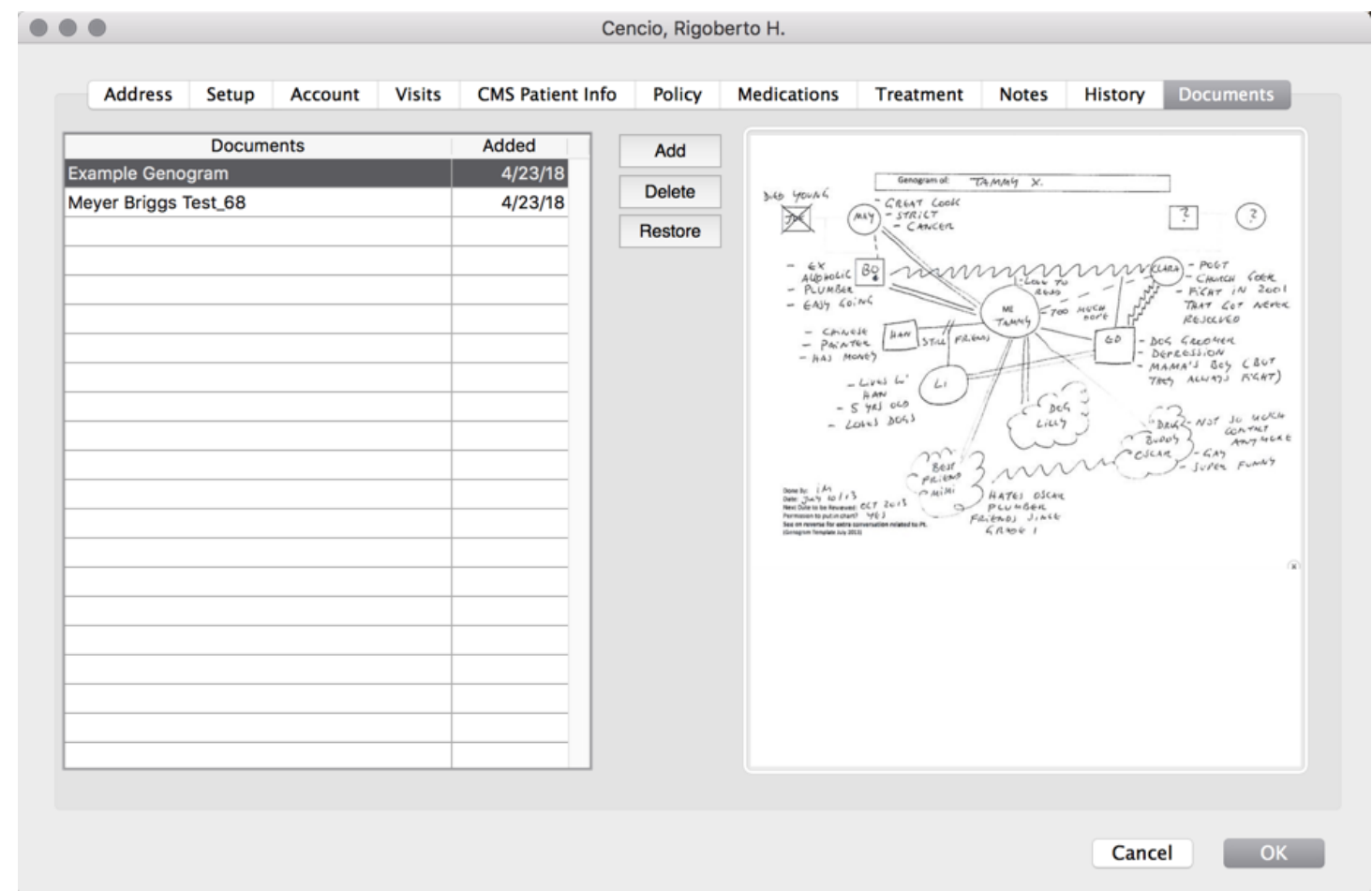
Social History

Family History

Cancel OK

1. Click the **Documents** tab to open this page of the patient record.
2. Click the **Add** button to select an image file or PDF to add to the list. On the left side of the window is a list of documents that have been added.
3. Click on the document name in the list to see an image of the first page displayed on the right.

Figure 3.12 Stored Documents



Importing Patient Records

QUICK STEPS

1. **Create a list of patients, their insured and responsible parties by exporting the information from your current billing software.**
2. **Open the list you created with a spreadsheet program such as Microsoft Excel or Apple numbers.**
3. **Rearrange the columns of the information as needed so it matches the exact order in the example provided in figure 4.1 and the list example provided.**
4. **Save the spreadsheet as a tab delimited text file.**
5. **Close the Patient List in ShrinkRapt and choose Import Patients from the File menu.**
6. **Select the text file you created and open it.**
7. **Review the list of people and make any changes needed.**



Patients, their responsible parties and insured can be added to ShrinkRapt manually using the Patient List or by importing them from a list created by your current billing program. Exporting and importing this information into ShrinkRapt, which will save time.

Exporting From Your Current Program

Your current program should be able to export your patient information to a file that can be opened and viewed by a spreadsheet program such as Microsoft Excel or Apple Numbers. Check your current program user manual or help files for instructions for how to export information. See the example in figure 3.13 to choose what information to export.

Preparing The List For Importing

The best way to view the information you exported is to open the file you created with a spreadsheet program. The spread sheet should look something like figure 3.13. You should rearrange the order of the information so the columns are in the exact order shown in the example and in the description provided below the picture.

If you do not have information shown below (because it was not available to export from your current program) you should insert blank columns as needed.

Figure 3.13 Patient List Spreadsheet For Importing

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T	U
1	Patient	First	Middle	Last	Address 1	Address 2	City	State	ZIP	Home Phone	Office Phone	Cell Phone	DOB	Gender	SSN	Employer	Insurance Co	Payor ID	Policy #	ID #	Balance
2	No	Jonathan		Smith	1201 Joshua Ct.		St. Charles	IL	60000	7085553258		7085553359	05/15/71	Male	555555555	Delta Airlines	Delta Health Care	DHS01	ABC45	xyz56	540
3	Yes	Buster		Smith	1201 Joshua Ct.		St. Charles	IL	60000				03/29/02	Male	555555555	Marino High	Delta Health Care	DHS01	cba45	zyx56	0
4	Yes	Curtis	F.	Rook	2336 Oakmont	Apt B	Bedford	IL	60596	7085559368			02/09/69	Female	555555555	Basden Industries	BCBS Illinois	621	ABC45	xyz56	380
5	Yes	Susan		Shire	2400 Mesquite Ct. East		Cranston	IL	60554			7085553359	11/02/70	Male		Logistics		44054	ABC45	xyz56	0
6	No	Kevin		Shire	2400 Mesquite Ct. East		Brandon	IL	60598	7085554562			07/15/77	Female		Rhoden Electric Co.	Humana Behavioral		ABC45	xyz56	340
7	Yes	Bill		Ramsey	1514 Brentwood Tr.		Miller	IL	60532	7085553359			11/11/58	Male		Service Merchandise					0
8	Yes	Ken		Farnes	Rt. 2 Box 27		Wheaton	IL	60125	7085554466	7085556632	7085553359	11/23/66	Male	555555555	Keebler Co.		adsfadf	ABC45	zyx56	85
9	Yes	John		Blackstone	3014 Pitkin Dr.	Apt B	Arlington	IL	60555	7085559875	3125559632		12/29/54	Male	555555555	American Airlines					0
10	Yes	Gail	S	Masterson	1400 Park #116		Naperville	IL	60594			7085553359	02/25/81		555555555	Frymire Engineering					0
11	Yes	Rigoberto	H.	Cencio	2815 Clinton		Longbrook	IL	60215			7085553359	12/01/64	Male	555555555						0
12	Yes	Stanley		Denford	601 W. College Street #6		Grapevine	IL	60012	7085555467	7085557719		06/03/45	Male	555555555	Miller Brewing Co.					0
13	Yes	Michael	M.	Terry	1707 Dove Loop #1312		Grandstand	IL	60559		7085556818	7085553359	07/02/53	Male	555555555	IBM					0
14	Yes	Fred	W.	Abby	302 E Owens		Ford	IL	60523	7086685555			07/23/63	Male	555555555	AllTex Chemical	BCBS Illinois	621	ABC45	zyx56	110
15	Yes	Brooke		Burnett	2509 Rollingshire Ct	Apt B	Ford	IL	76021				12/11/93	Female	555555555						0
16	No	Jerry		Burnett	2509 Rollingshire Ct	Apt B	Ford	IL	76021	7085554913	7085557003	7085553359	09/30/75	Male	555555555	Al's Formal Wear	Rush HMO	36389	ABC45	zyx56	380
17	Yes	Kenny		Garnett	3321 Sunday Street		Oregon	IL	60556	3085551817	3085554905		06/02/51	Male	555555555	ACF Tarp & Awning					85
18	Yes	Howard		Dogherty	1859 E. Broad		Mansfield	IL	60636	7085553579		7085553359	12/16/78	Male		G.R.C. Associates					0
19	Yes	James		Scruggs	3205 Shady Brook Dr.		Ford	IL	60596	7085550381	7085552161		09/24/46	Male		G.R.C. Associates	Advantage Preferred		ABC45	zyx56	0
20																					
21																					
22																					
23																					
24																					

The following is a description of the information that should appear in each column:

Column A: Insert a column before the first name and enter Yes to designate this person as a patient or No if they are the responsible party or insured but not a patient.

Column B: First Name of the person

Column C: Middle Name/initial of the person

Column D: Last Name of the person

Column E: Address 1

Column F: Address 2. If you do not have an address two column, you should insert an empty column

Column G: City

Column H: State, change as needed so the state abbreviation is showing, e.g.. IL not Illinois

Column I: Zip, use 5 or 9 digit zip

Column J: Home Phone, format as all numbers, e.g. no dashes or parenthesis

Column K: Office Phone, format as all numbers, e.g. no dashes or parenthesis.

Column L: Cell Phone, format as all numbers, e.g. no dashes or parenthesis

Column M: Date of birth, format as mm/dd/yy

Column N: Gender, enter Male or Female

Column O: Social Security Number, format as all numbers, e.g. no dashes or parenthesis

Column P: Employer, name of the company.

Column Q: Insurance Company, name of insurance company. ShrinkRapt will try to find a match with the insurance company records in ShrinkRapt. If none is found, a new insurance company record will be added.

Column R: Payor Id - if you have the insurance company payor Id, this is the best way to identify an insurance company and you should enter it in the list. When the id number is imported, ShrinkRapt will search it's list of existing insurance company records and match the company record to the person's record.

Column S: Policy Number, policy number of the insured. The number should be entered only if that person is the insured. If they are the patient, but do not own the policy, leave this field blank. Put the Policy number in the row of the person who is the

insured. If you do not have the name and address of the insured in the list, you will be able to enter this information after importing the patient information.

Column T: Insured Id No from insurance card. The number should be entered only if that person is the insured. If they are the patient, but do not own the policy, leave this field blank. Put the Id number in the row of the person who is the insured. If you do not have the name and address of the insured in the list, you will be able to enter this information after importing the patient information.

Column Z: Beginning Balance, balance owed before you started entering transactions in ShrinkRapt

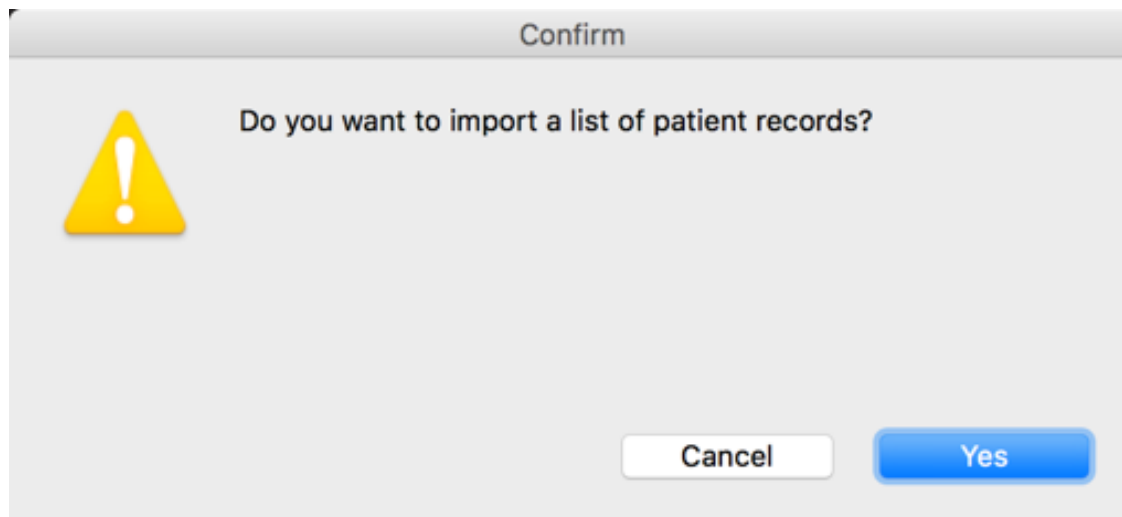
After rearranging the columns of information and inserting blank columns where necessary, save the spreadsheet as a tab delimited text file. It is important to use tab delimited text as the file type when saving so ShrinkRapt can properly import the information. Pay close attention to where you are saving the file on your hard drive so you can easier locate it for importing.

Importing The List

To import patient records, close the Patient List in ShrinkRapt and choose Import Patients from the file menu. The following window will appear:

Click Yes and navigate to the location of the text file you created, select and open it to begin the importing.

Figure 3.14 Confirm Importing



Reviewing The List In ShrinkRapt

After ShrinkRapt completes importing, the Patient List window will appear as shown in figure 4.3. Anyone that was designated as a patient, will have your name in the practitioner column. Anyone without your name shown as the practitioner has been designated as a responsible party or insured. Double click on a name in the list to review and make changes to the information.

Figure 3.15 Patient List After Importing

Client List: 19 of 19

Name	Address	Cell	Home	Practitioner
Last, First M.	Address 1, Address 2, City, Sta ZIP	(Cel) I P-hone	(Hom) e P-hone	Johnson, Michael
Smith, Jonathan	1201 Joshua Ct., St. Charles, IL 60000	(708) 555-3359	(708) 555-3258	
Smith, Buster	1201 Joshua Ct., St. Charles, IL 60000			Johnson, Michael
Rook, Curtis F.	2336 Oakmont, Apt B, Bedford, IL 60596		(708) 555-9368	Johnson, Michael
Shire, Susan	2400 Mesquite Ct. East, Cranston, IL 60554	(708) 555-3359		Johnson, Michael
Shire, Kevin	2400 Mesquite Ct. East, Brandon, IL 60598		(708) 555-4562	
Ramsey, Bill	1514 Brentwood Tr., Miller, IL 60532		(708) 555-3359	Johnson, Michael
Farnes, Ken	Rt. 2 Box 27, Wheaton, IL 60125	(708) 555-3359	(708) 555-4466	Johnson, Michael
Blackstone, John	3014 Pitkin Dr., Apt B, Arlington, IL 60555		(708) 555-9875	Johnson, Michael
Masterson, Gail S.	1400 Park #116, Naperville, IL 60594	(708) 555-3359		Johnson, Michael
Cencio, Rigoberto H.	2815 Clinton, Longbrook, IL 60215	(708) 555-3359		Johnson, Michael
Denford, Stanley	601 W. College Street #6, Grapevine, IL 60012		(708) 555-5467	Johnson, Michael
Terry, Michael M.	1707 Dove Loop #1312, Grandstand, IL 60559	(708) 555-3359		Johnson, Michael
Abby, Fred W.	302 E Owens, Ford, IL 60523		(708) 668-5555	Johnson, Michael
Burnett, Brooke	2509 Rollingshire Ct, Apt 8, Ford, IL 76021			Johnson, Michael
Burnett, Jerry	2509 Rollingshire Ct, Apt 8, Ford, IL 76021	(708) 555-3359	(708) 555-4913	
Garnett, Kenny	3321 Sunday Street, Oregon, IL 60556		(308) 555-1817	Johnson, Michael
Dogherthy, Howard	1859 E. Broad, Mansfield, IL 60636	(708) 555-3359	(708) 555-3579	Johnson, Michael
Scruggs, James	3205 Shady Brook Dr., Ford, IL 60596		(708) 555-0381	Johnson, Michael

Labels

Report

Sort

Modify

Delete

Show All

Select

Print

Done

Matching Patients and Insured

To make someone the responsible party or insured for a patient follow these steps:

- 1. Double click on a patient name in the list.
- 2. Click the Setup Tab. You will see that the patient's name is listed in the responsible party insured area.
- 3. If someone else is the responsible party, highlight the name, type a few characters of the person's last name and press the tab key.

- 4. ShrinkRapt will locate the record of the responsible party and link it to the patient.
- 5. If someone else is the insured but not the responsible party, click the Add button and enter the name of the insured in the responsible party insured area.

In the next section you will find more information about the patient record, how to enter policy information, CMS patient information, treatment plans, and medications.

Figure 3.16 Changing the responsible party

Abby, Fred W.

Address Setup Account Visits CMS Patient Info Policy Medications Treatment

Practitioner: Elliot, Samuel C.

CPT Code	Fee	Modifier	Unit	ICD 1	ICD 2	ICD 3	ICD 4
1 90834	\$95.00		1	F329			
2	\$0.00		0				
3	\$0.00		0				

Ttl Fee: \$95.00
Payment: \$25.00
Adjustment: \$0.00

Description: Co-Payment

Change As Needed

Responsible Party(s)/Insured	Ttl Amt	Resp/Insured
Abby, Fred W.	\$95.00	\$25.00

Place of Service: Family Counseling Practice Code 11
2345 North Michigan
St. Charles IL

Authorization	Period Allowed	Max	Used
138540	02/11/16 01/10/17	10	4

Current Authorization: 138540

Buttons: Add, Delete, Modify, Cancel, OK & Next

Entering Visits and Payments

In this chapter we will discuss how to add visits, payments and adjustment records that are used to prepare billing statements and print insurance claims forms.

Add A Visit

QUICK STEPS

- 1. Click on a name in the Patient List.
- 2. Click the Visits button on the left side of the Patient List window (in the "Add" area). ShrinkRapt completes the visit entry with information saved on the Setup page of the patient record.
- 3. Make any changes needed.
- 4. Click OK & Next to save the visit or click the Notes tab to enter a visit note.

Entering a visit record is easy. ShrinkRapt uses the information you entered on the Setup page of the patient record to automatically enter information into the visit record. You can change what has been entered at any time.

The Visit record has three pages, the Detail page (Figure 4.1), the Notes page and the Insurance Payments page. The information entered on the Detail page of the will be used on the Billing Statement and the CMS 1500 insurance claim form.

Figure 4.1 Visit Entry

The screenshot shows the 'Visit Entry' window with three tabs: 'Detail', 'Notes', and 'Insurance Payments'. The 'Detail' tab is active. The form contains the following fields and sections:

- Visit Date:** 04/14/18
- Start:** 00:00:00
- Stop:** 12:00 AM
- Number:** (empty field)
- Visit Attendee(s):** A list box containing 'Abby, Fred W.' with 'Add' and 'Delete' buttons.
- Responsible Party/Insured:** A list box containing 'Abby, Fred W.' with 'Total' (\$95.00) and 'Resp Amt' (\$25.00) columns.
- Patient:** A list box containing 'Abby, Fred W.' with a 'Remaining' amount of \$0.00.
- CPT Code Table:**

	CPT Code	Fee	Modifier	Units	ICD 1	ICD 2	ICD 3	ICD 4
1	90834	\$95.00		1	F32.9	F13.15		
2		\$0.00		0				
3		\$0.00		0				
- Total Fee:** \$95.00
- Reason For Visit:** Self
- Place of Service:** Associates in Family Counselin
- Code:** (empty field)
- ER:** (checkbox)
- Practitioner:** Elliot, Samual C.
- Authorization:** 138540
- Remaining:** 11
- Claim Last Submitted:** (empty field)

At the bottom are buttons for 'Duplicate', 'Cancel', and 'OK'.

Detail Page

The following is a description of some of the fields on the detail page and where the information will appear on the billing statement and insurance claim forms.

- **Visit Date** can include a start and stop time but is not required. The start and stop times are for your reference only and not used on statements or insurance forms.
- **Visit Attendees** is where you will list who was present at the visit. This area allows you to keep track of who was present other than the person considered to be the patient for insurance purposes. To list a name you must also create a record for the person.
- **CPT Code 1, 2, and 3** fields will print on the billing statement and in CMS box 24d. You can enter up to three codes per visit and a fee for each code.
- **ICD** describes the diagnostic codes you have chosen for this visit and or patient. You may enter up to four codes per CPT code.
- **Modifier** describes the modifier for the code on the same line. The modifier will print in **CMS box 24d**.
- **Units** describes the number of units or days for the CPT codes listed. One is most commonly used for units. The number entered will print will print in **CMS box 24G**.
- **Reason For Visit** describes the purpose of the visit such as Marriage Counseling. This information is for your use only and does not print in on the Billing Statement or CMS form.
- **Place of Service** describes the location of where the visit is occurring. You must use one of the locations you have entered

as a place of service in ShrinkRapt. A place of service was automatically setup when you entered your practice information. You can add new places of service (such as a hospital) by using the place of service button on the Patient List.

Visit Notes

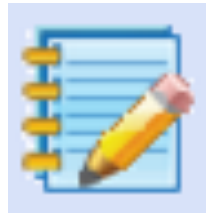
QUICK STEPS

1. Click the Notes Tab on the Visit Entry window.

Or

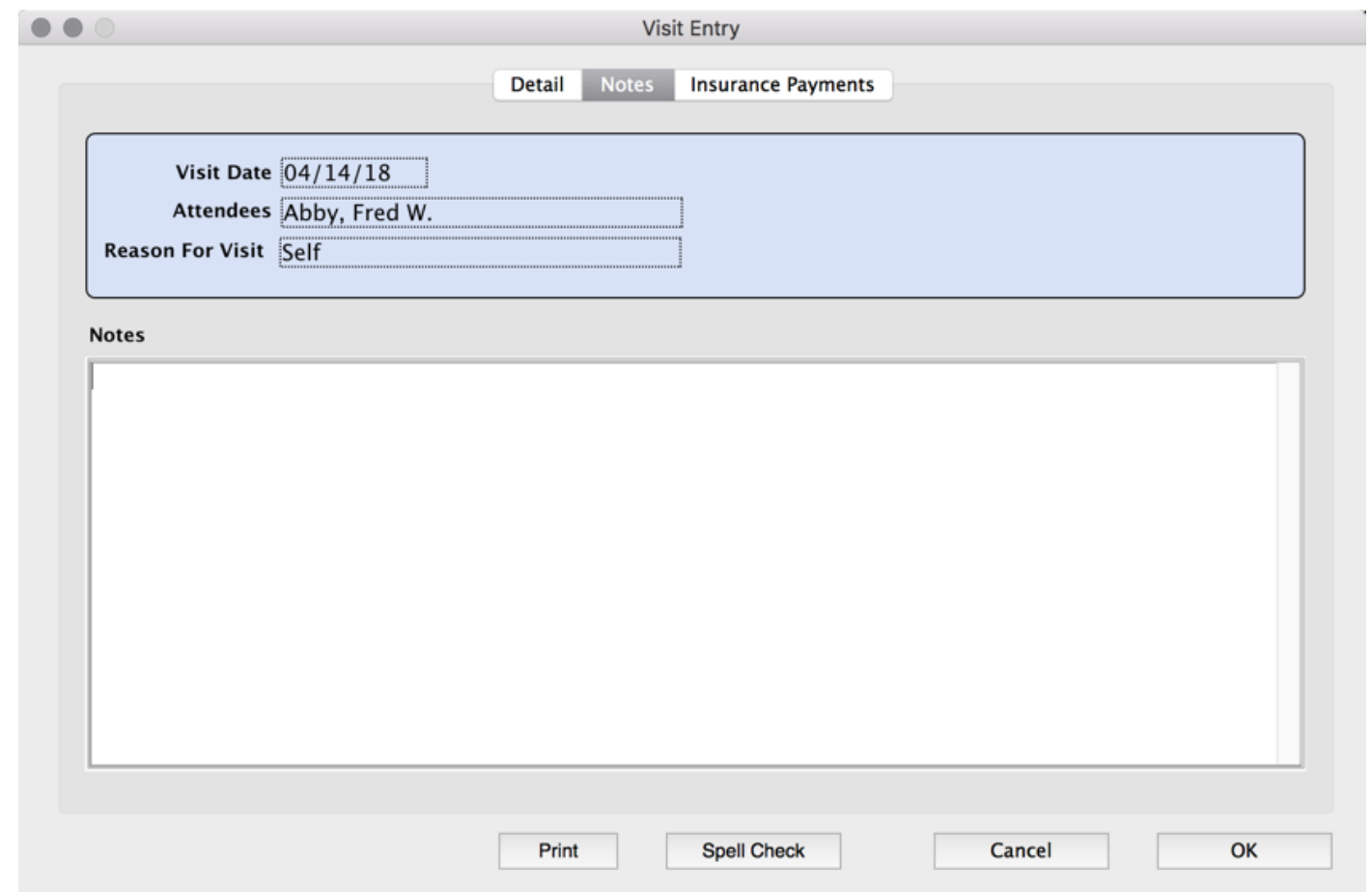
2. Click the Notes button on the Patient List (Figure 4.3)
3. Click OK & Next to save the changes or click another tab to enter more information.

Figure 4.2



Visit notes can be entered at the same time you enter the visit record or afterwords using the Notes button on the Patient List. Notes can be easily reviewed and edited from the Patient List.

Figure 4.3 Visit Note

A screenshot of a software window titled "Visit Entry". The window has three tabs: "Detail", "Notes" (which is selected), and "Insurance Payments". The "Notes" tab contains a large text area for entering notes. Above the text area, there are three input fields: "Visit Date" with the value "04/14/18", "Attendees" with the value "Abby, Fred W.", and "Reason For Visit" with the value "Self". At the bottom of the window, there are four buttons: "Print", "Spell Check", "Cancel", and "OK".

Add A Payment

QUICK STEPS

- 1. Click on a name in the Patient List.
- 2. Click the Payment button located on the left side of the Patient List window.
- 3. Click the Receipt button to print Super Bill/ Receipt to give to the patient.
- 4. Click OK & Next to save the payment entry.

The payment entry screen is automatically completed with the payment information that has been entered on the setup page in the patient record. If you enter a check number, you will be able to use ShrinkRapt's Deposit Slip feature and save having to write check numbers and amounts on your bank deposit slip.

When you use the auto importing of ERAs, ShrinkRapt will automatically enter insurance payments and apply them to the appropriate visit dates. This makes tracking unpaid claims a snap.

Figure 4.4 Payment Entry

Payment Entry

Payment

Patient: Abby, Fred W. Practitioner: Elliot, Samuel C.
Account: Abby, Fred W. 302 E Owens Ford IL 60523-1000

Payor: Abby, Fred W. Date: 04/12/18
Method: ☒ Check ☐ Cash ☐ CC ☐ ePay ☐ Other Amount: \$25.00
Description: Co-Payment Check No.: 3467
Payor Type: ☐ Insurance ☒ Client or Agency ☐ Returned NSF

Insurance Payment Detail ☐ Secondary Insurance Payment

Company: Payor Id: ERA #:

✓	Visit	Claim	ERA DOS	CPT	Billed	Adj	ERA Code	Ded	Co-	Ins Paid

Add Delete Show All

Receipt Cancel OK & Next

A receipt to be printed and given to the patient when the payment is entered. If you don't file insurance claims for your patients, this receipt has all this information they need to submit the claims themselves.

Figure 4.5 Patient Payment Receipt and Super Bill

Payment Receipt
04/12/18

Associates In Family Counseling
2345 North Michigan
Suite 345
St. Charles, IL 60175
(708) 555-1212

Practitioner

Elliot, Samuel C.
NPI: 1111111112

Account

Abby, Fred W.
302 E Owens
Ford IL 60523-1000

Patient

Abby, Fred W.

Payment Detail

Payor	Abby, Fred W.
Payment Method	Check
Number	3467
Amount	\$25.00

Today's Charges

Code	Description	ICD 10	Charge
90834	Psychotherapy, 45 minutes with patient and/or family member	F32.9 F13.15	95.00
Total			95.00

Billing & Insurance

ShrinkRapt® will handle all your billing and insurance needs. Billing statements can be printed to plain paper or on preprinted statements available from Saner Software. Insurance claims can be printed on paper or filed electronically using a claims clearinghouse. In this chapter we will walk you through preparing a billing statements and insurance claims.

- 1. Click the three person icon in the Bill area of the Patient List.**

Figure 5.1 Statement List

Billing Statements

Filter List To Get Exactly What You Need

Find In List

Transaction Range
 to

Remove
 Subset
 Remove
 Remove
 Restore
 Update

Date

Message

 Preview
 eMail
 Print

Last Statement

Print Cancel

Name	Patient	Billing Address	Phone	Balance	Last Sent	eMail
Abby, Fred W.	Abby, Fred W.	302 E Owens, Ford, IL 60623-1000		\$90.00	10/01/17	☒
Burnett, Jerry	Burnett, Brooke	2509 Rollingshire Ct., Ford, IL 76021	(708) 555-4913	\$190.00		☐
Cencio, Rigoberto H.	Cencio, Rigoberto H.	2815 Clinton, Longbrook, IL 60215		\$85.00	09/08/17	☐
Dogherty, Howard	Dogherty, Howard	1859 E. Broad, Mansfield, IL 60636		\$0.00		☐
Farnes, Ken	Farnes, Ken	Rt. 2 Box 27, Wheaton, IL 60125		\$170.00		☐
Masterson, Gail S.	Masterson, Gail S.	1400 Park #116, Naperville, IL 60594	(708) 555-7793	\$0.00		☐
Ramsey, Bill	Ramsey, Bill	1514 Brentwood Tr., Miller, IL 60532		\$95.00		☐
Rook, Curtis F.	Rook, Curtis F.	2336 Oakmont, Bedford, IL 60596		\$285.00		☐
Scruggs, James	Scruggs, James	3205 Shady Brook Dr., Ford, IL 60596		\$95.00	10/06/17	☐
Shire, Susan	Shire, Susan	2400 Mesquite Ct....Cranston, IL 60554		\$85.00		☐
Smith, Jonathan	Smith, Buster	1201 Joshua Ct., St. Charles, IL 60000	(708) 555-3258	\$135.00		☐
Terry, Michael M.	Terry, Michael M.	1707 Dove Loop #...andstand, IL 60559	(708) 555-4604	\$85.00		☐
				\$1,315.00		

Preview On Screen - Send By Email or Print To Paper

Statement style, detail, and appearance can all be customized so you present the image you want, and provide your patients with the information they need. Statements can be printed on plain paper, **preprinted forms available from Saner Software**, or emailed to patients. ShrinkRapt is designed so you can customize the statement to the needs of your practice.

Three distinct statement types are available to choose from and you can mix and match the type of statements used by each patient. The statement types are Detailed, Simple, and Patient Balance Only.

Earlier we showed how to set the type of statement you would like to send to your patients and how it can be customized patient by patient.

Simple Statement

The simple statement choice prints fees, adjustments and payments from patients and insurance companies. This is a good statement choice if the patient is self pay. If you do not accept insurance, this statement provides all the info needed for the patient to submit a claim to their insurance company

Figure 5.2 Simple Plain Paper Statement

Associates In Family Counseling
2345 North Michigan
Suite 345
St. Charles, IL 60175

(708) 555-1212
FEIN - 59-5555555
Please make checks payable to: Associates In Family Counseling

For Professional Services of:
Barris D Jones M.A.M.F.C/M.A.R.E.
State License #

Under the supervision of:
Samual C. Elliot M.D.
State License # 09314

Gail S Masterson
1400 Park #116
Naperville, IL 60594

Statement Date: 07/21/16

Billing Period: 1/1/16 to 7/21/16

ICD Code 10: F4323

Previous Balance: \$0.00

Date	CPT	Description	Fee	Payment	Balance
5/30/16		Client Courtesy		\$45.00	\$-45.00
5/30/16		Payment		\$40.00	\$-85.00
6/6/16		Client Courtesy		\$45.00	\$-130.00
6/6/16		Payment		\$40.00	\$-170.00
6/13/16	90834	Masterson, Gail S. - Psychotherapy, 45 minutes with	\$85.00		\$-85.00
6/13/16		Client Courtesy		\$45.00	\$-130.00
6/13/16		Payment		\$40.00	\$-170.00
6/20/16	90834	Masterson, Gail S. - Psychotherapy, 45 minutes with	\$85.00		\$-85.00
6/20/16		Client Courtesy		\$45.00	\$-130.00
6/20/16		Payment		\$40.00	\$-170.00
6/30/16	90791	Masterson, Gail S. - Psychiatric diagnostic evaluation	\$85.00		\$-85.00
7/6/16	90834	Masterson, Gail S. - Psychotherapy, 45 minutes with	\$85.00		\$0.00
New Balance					\$0.00

Over 90 Days \$0.00 61-90 Days \$0.00 31-60 Days \$0.00 0-30 Days \$0.00

Detailed Statement

For patients with insurance, who want to see exactly what the insurance paid and adjusted, the Detailed Statement offers the most information. Providing a high level of detail on the billing statement can reduce billing phone inquiries from patients.

Figure 5.3 Detailed Plain Paper Statement

Associates In Family Counseling
2345 North Michigan
Suite 345
St. Charles, IL 60175

(708) 555-1212
FEIN - 59-5555555
Please make checks payable to: Associates In Family Counseling

For Professional Services of:
Samual C. Elliot M.D.
State License # 09314

Fred W. Abby
302 E Owens
Ford, IL 60523-1000

Statement Date: 07/21/16

Billing Period: 1/1/16 to 7/21/16

Previous Balance: \$0.00

Date	Patient	CPT	Description	Explanation of Benefits			Fees Payments Adjusts		Balance
				Deduct	Adjusted	Paid	Charges	Credits	
6/22/16	Fred W.	90834	Psychotherapy, 45 min	\$0.00	\$19.00	\$66.00	\$95.00		\$95.00
6/22/16			Co-Payment					\$25.00	\$70.00
6/29/16	Fred W.	90834	Psychotherapy, 45 min	\$0.00	\$19.00	\$66.00	\$95.00		\$165.00
6/29/16			Co-Payment					\$25.00	\$140.00
7/6/16	Fred W.	90834	Psychotherapy, 45 min				\$95.00		\$235.00
7/6/16			Co-Payment					\$25.00	\$210.00
7/13/16	Fred W.	90834	Psychotherapy, 45 min				\$95.00		\$305.00
7/13/16			Co-Payment					\$25.00	\$280.00
7/19/16			Insurance Adjustment					\$38.00	\$242.00
7/19/16			Insurance Payment					\$132.00	\$110.00
New Balance									\$110.00

Over 90 Days \$0.00 61-90 Days \$0.00 31-60 Days \$0.00 0-30 Days \$110.00

Patient Balance Only

Sometimes the most simple is the best. If you want a statement that shows the patient only the amount they owe and excludes the insurance detail, the Patient Balance Only statement is the one to choose.

Figure 5.4 Patient Balance Only Statement

Associates In Family Counseling
2345 North Michigan
Suite 345
St. Charles, IL 60175

(708) 555-1212
FEIN - 59-5555555
Please make checks payable to: Associates In Family Counseling

For Professional Services of:
Samual C. Elliot M.D.
State License # 09314

Fred W. Abby
302 E Owens
Ford, IL 60523-1000

Statement Date: 07/24/16

Billing Period: 1/1/16 to 7/24/16

Previous Balance: \$0.00

Date	CPT	Description	Fee	Payment	Balance
6/22/16		Visit Charge	\$25.00		\$25.00
6/22/16		Co-Payment		\$25.00	\$0.00
6/29/16		Visit Charge	\$25.00		\$25.00
6/29/16		Co-Payment		\$25.00	\$0.00
7/6/16		Visit Charge	\$25.00		\$25.00
7/6/16		Co-Payment		\$25.00	\$0.00
7/13/16		Visit Charge	\$25.00		\$25.00
7/13/16		Co-Payment		\$25.00	\$0.00
New Balance					\$0.00

Over 90 Days \$0.00 61-90 Days \$0.00 31-60 Days \$0.00 0-30 Days \$0.00

Preprinted Forms

A preprinted billing statement form is available from Saner Software for use with the simple and patient balance only statement type. These form can be bought online at www.shop.sanersoftware.com. Emailing Statements

Figure 5.5 Pre-Printed Billing Statement

[illegible]

When printing statements you can choose to save the statement as a PDF rather than printing it to paper. The Save As PDF feature is part of your computer's operating system. After saving the statement as a PDF, you can send it to your patient as an attachment to an email.

IMPORTANT - If you choose to email statements to patients, it is important that you make yourself aware of HIPAA laws for patient email. [Click here](#) to visit the HHS web page that discusses email communication requirements.

As of this writing, HIPAA does NOT require you to use encrypted email to send patient communication. It does require you to reasonably protect privacy by limiting the amount of information disclosed.

In ShrinkRapt you can limit the information printed on a billing statement to protect patient privacy. You can choose to remove ICD and CPT codes so all that is shown is the visit charge and payments.

Customizing The Billing Statement

Billing statements can be customized so they include or exclude the following information:

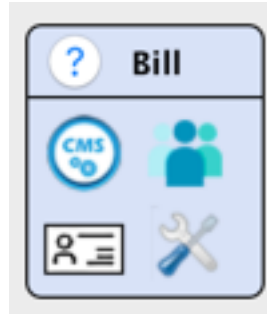
- ICD and CPT Codes.
- A line showing what part of the balance is over 30, 60, and 90 days old
- A Dunning Message for balances over 30 days old
- A line saying, "For the Professional Services of: your name and credentials".
- A line saying, "Under the Supervision of: the name and credentials of a Supervising Practitioner".
- A line saying, "Make checks payable to: the name of your practice".
- The patient's name on each line; This is important when one responsible party is paying for more than one patient's visits

As you can see, ShrinkRapt provides a great deal of flexibility to set up a billing statement to look exactly the way you want it to look!

Insurance Claims

QUICK STEPS

1. Click on CMS button in the Bill area of the Patient List
2. Choose to print claims to paper, create an eclaim file or preview claims on screen.



For a detailed description of the various claims processing options, continue reading this section.

ShrinkRapt® completes the CMS 1500 insurance claim form, ready to mail or submit as an electronic file to a clearing house of your choice.

For electronic claims, ShrinkRapt creates a Print Image file. The claims clearing house we recommend for electronic claims is [Claim.MD](#). You can contact them directly at (855) 757-6060 for pricing information. Please be sure to tell them you will be using ShrinkRapt as your billing and insurance program. When you use Claim.MD, you will be able to download insurance payments and ERA details directly into ShrinkRapt, saving you from having to manually enter payment info. If you choose a different clearing house (some are free), just make sure they accept a Print Image file.

If you choose to print claims on paper, forms and envelopes can be ordered online at the [Saner Software Online Store](#).

Claims can also be previewed and edited on-screen to check for errors before you submit the claims to an insurance company. In the pages that follow we will discuss each of these choices in detail.

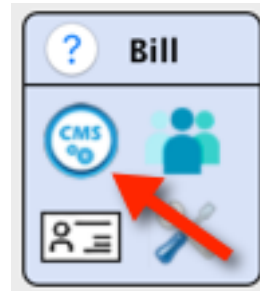
Preparing A Claim List

The first step for submitting claims is to prepare a claims list. To prepare a claims list follow these steps:

- Click the CMS button on the Patient List as shown in Figure 5.7.

A list of all claims that have not been filed (from the last 180 days) will appear as shown below in Figure 5.6. The list includes the insured's name, patient name, insurance company, number of visits on the claims and the total dollar amount of the claim.

Figure 5.7



Filtering The Claims List

The claims list can be filtered in several ways so you can process the exact claims you need.

- **Company** - Use the Company drop down menu to reduce the list to claims for a specific insurance company.
- **Remove** - To remove a claim from the list, highlight a row and click the Remove button.
- **Include Previously Filed** - Click the Yes button and then the Update button to get a list of all claim within the selected date range even if they were submitted previously. You will use this feature when you need to resubmit a claim.
- **Date Range** - To create a list for a specific date range, change the dates and click the Update button.
- **Subset** - Hold down the command key on a Mac or control key on Windows to select specific name in the list. Click the Subset button to reduce the list to the selected names.
- **Restore** - Click the restore button to return to the original list of claims.

Figure 5.6 Claims List

?

Insurance Claims

Filter

?

Date Range

09/15/17

to

05/14/18

Update

Restore

Include Previous

☐ Yes
 ☒ No

Company

Remove

Subset

Submit

Date

05/14/18

Preview

eClaim

Print

3

Records

Insured	Patient	Insurance Company	Address	Visits	Fees
Abby, Fred W.	Abby, Fred W.	Blue Cross and Blue Shield of Illinois	P.O. Box 805107, C...ago, IL 60680-4112	12	\$1,330.00
Burnett, Jerry	Burnett, Brooke	Rush Prudential Health Plans HMO	233 S Wacker Dr, Chicago, IL 60606	2	\$190.00
Scruggs, James	Scruggs, James	Advantage Preferred Plus	9045 N. River Road,...lanapolis, IN 46240	1	\$95.00
				15	\$1,615.00

Print

Cancel

Submitting Claims

When you have created the claims list you want, there are three choices for processing the list.

- **Preview** - Click the Preview button at the bottom of the claim

- **Print** - Click the Print button in the Submit area to send the claims to your printer. ShrinkRapt will complete the preprinted CMS 1500 form. These forms are available to buy at shop.sanersoftware.com. The print alignment can be adjusted mm by mm on the **Paper Choices** page in **Preferences** to get perfect print alignment on the paper for



Figure 5.8 Insurance Claim Preview

HEALTH INSURANCE CLAIM FORM
APPROVED BY NATIONAL UNIFORM CLAIM COMMITTEE (NUCC) 02/12

Blue Cross and Blue Shield of Illinois
P.O. Box 805107
Chicago, IL 60680-4112

1. MEDICARE MEDICAID TRICARE CHAMPVA GROUP HEALTH PLAN FECA BLX (LUNG) OTHER
2. PATIENT'S NAME (Last Name, First Name, Middle Initial)
3. PATIENT'S BIRTH DATE MM DO YY SEX
4. INSURED'S NAME (Last Name, First Name, Middle Initial)
5. PATIENT'S ADDRESS (No., Street)
6. PATIENT RELATIONSHIP TO INSURED
7. INSURED'S ADDRESS (No., Street)
8. RESERVED FOR NUCC USE
9. OTHER INSURED'S NAME (Last Name, First Name, Middle Initial)
10. IS PATIENT'S CONDITION RELATED TO:
11. INSURED'S POLICY GROUP OR FECA NUMBER
12. PATIENT'S OR AUTHORIZED PERSON'S SIGNATURE
13. INSURED'S OR AUTHORIZED PERSON'S SIGNATURE
14. DATE OF CURRENT ILLNESS, INJURY, or PREGNANCY (LMP)
15. OTHER DATE
16. DATES PATIENT UNABLE TO WORK IN CURRENT OCCUPATION

list to display a filled out claim form on-screen. Information on the form can be changed by clicking on it. When you click, you are taken to the source of the data in ShrinkRapt where you can change it. What you see on-screen is what will print on paper and in the electronic claim file.

Figure 5.9 CMS 1500 Form (2/12)

HEALTH INSURANCE CLAIM FORM
APPROVED BY NATIONAL UNIFORM CLAIM COMMITTEE (NUCC) 02/12

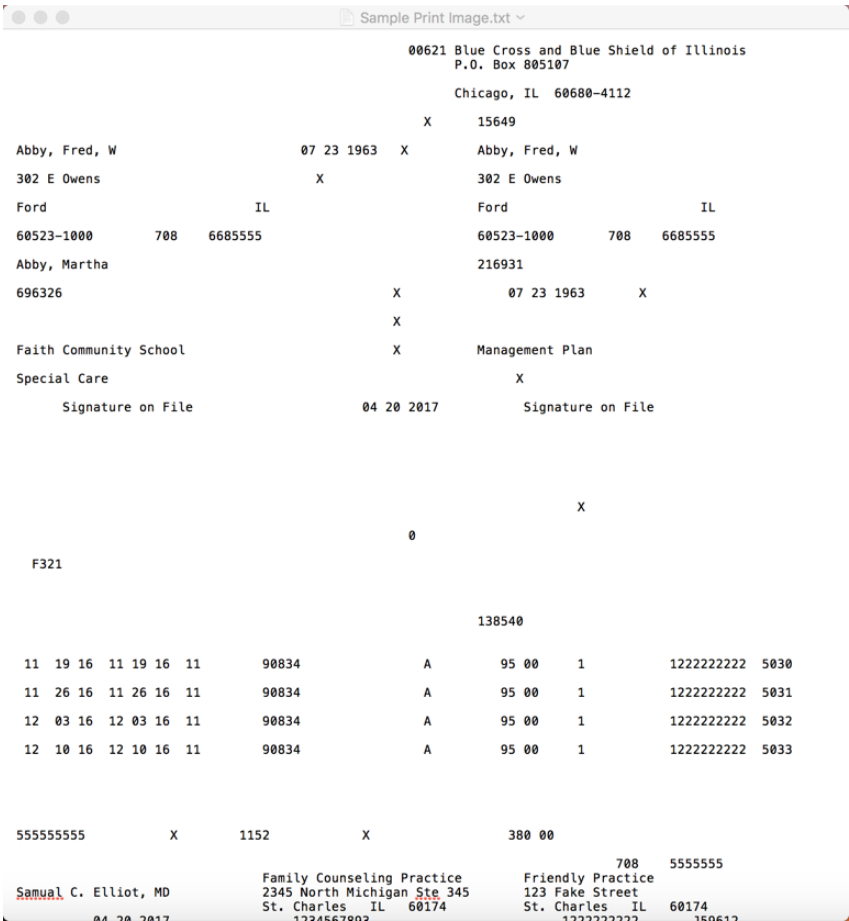
1. MEDICARE MEDICAID TRICARE CHAMPVA GROUP HEALTH PLAN FECA BLX (LUNG) OTHER
2. PATIENT'S NAME (Last Name, First Name, Middle Initial)
3. PATIENT'S BIRTH DATE MM DO YY SEX
4. INSURED'S NAME (Last Name, First Name, Middle Initial)
5. PATIENT'S ADDRESS (No., Street)
6. PATIENT RELATIONSHIP TO INSURED
7. INSURED'S ADDRESS (No., Street)
8. RESERVED FOR NUCC USE
9. OTHER INSURED'S NAME (Last Name, First Name, Middle Initial)
10. IS PATIENT'S CONDITION RELATED TO:
11. INSURED'S POLICY GROUP OR FECA NUMBER
12. PATIENT'S OR AUTHORIZED PERSON'S SIGNATURE
13. INSURED'S OR AUTHORIZED PERSON'S SIGNATURE
14. DATE OF CURRENT ILLNESS, INJURY, or PREGNANCY (LMP)
15. OTHER DATE
16. DATES PATIENT UNABLE TO WORK IN CURRENT OCCUPATION

• **eClaim** - Click the eClaim button in the Submit area to create an electronic file. The file created is a tab delimited text file. It is commonly referred to as a Print Image file and will look like the image shown below if you were to open it with a text editor.

You can choose to send your claims to any clearinghouse that accepts a print image file. The claim clearinghouse you use needs to map their software to read this file properly.

Saner Software’s preferred clearinghouse is Claim.MD and we guarantee they can properly read the file ShrinkRapt creates.

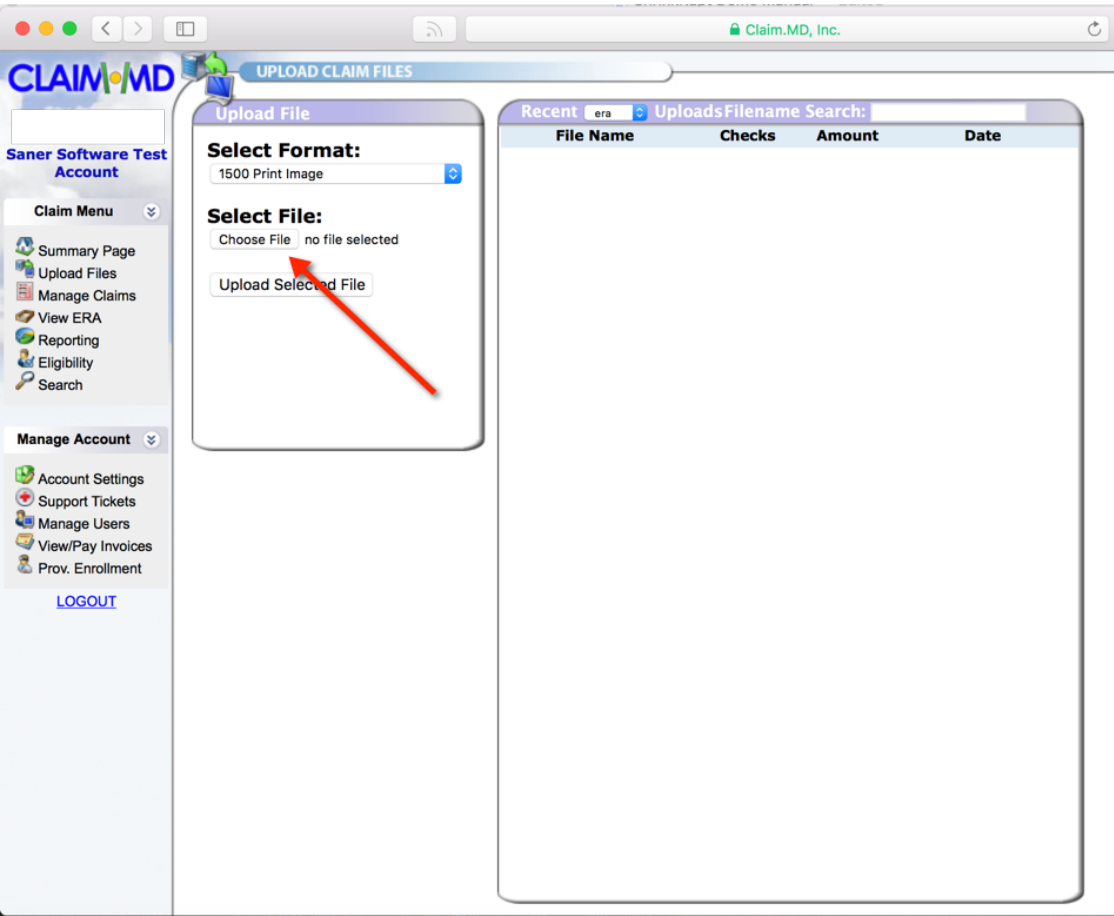
Figure 5.10 Print Image File



Sending The File To Your Clearinghouse

After saving the electronic claim file, you can upload it to your claims clearing house. It is important to choose a claims clearinghouse that will makes it easy to submit and check claims for errors. Claim.MD does this plus they have partnered with Saner Software to offer auto uploading of claims and importing of ERAs.

Figure 5.11 Uploading An Electronic Claim File



Scheduling

The scheduler is fully integrated with the billing and insurance components of ShrinkRapt. Information entered in the scheduler is automatically used by ShrinkRapt so you only have to enter the Information once.

Scheduling Module

QUICK STEPS

- 1. Click the calendar icon in the upper left hand corner of the Patient List.
- 2. Click the Create Schedule Button and follow the on-screen instructions
- 3. Click in the patient field for a time line.
- 4. Enter the first few characters of a patient's last name and press tab.
- 5. Make changes to the information as needed.
- 6. Double click on any line to view complete information for the visit.
- 7. At day's end, click the Process button to add the visit, payment and adjustment records. When the records were created, a check mark will appear in the D column on the time line.



ShrinkRapt Demo comes with a basic, straight forward scheduling program that is seamlessly integrated with it's billing and insurance capabilities. You can create a list of time slots for your schedule, add a patient name to a time slot and then post the visit's accounting to the patient account with the click of a button at the end of the day. It does not get much easier than that.

Figure 6.1

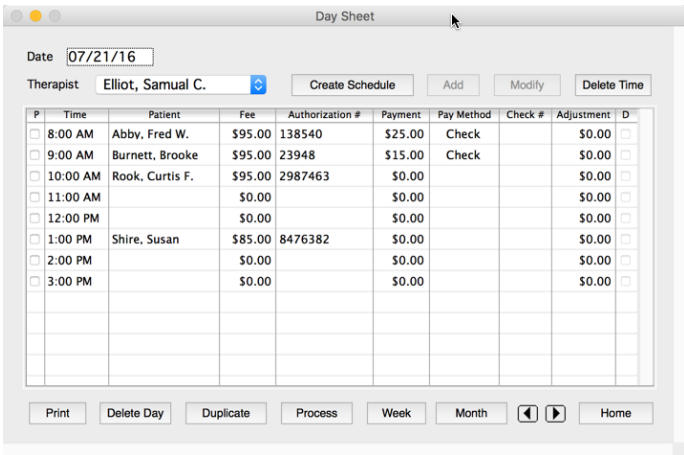


Figure 6.2

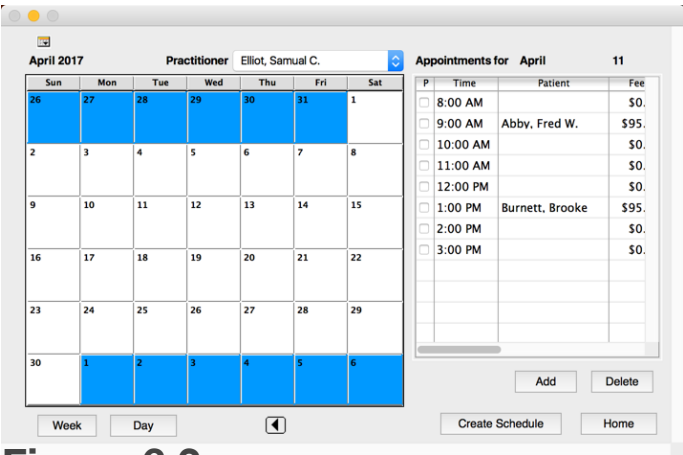
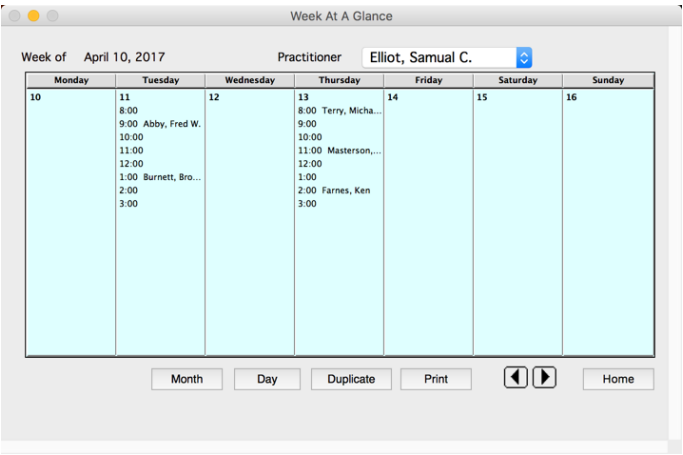


Figure 6.3



Your schedule can be viewed as a single day (the Day Sheet), a month calendar or a week.

You and Your Practice

In this chapter we discuss the information you need to enter about you and your practice to properly prepare patient statements and claims to be submitted to insurance companies.

About You

QUICK STEPS



1. Click the Practitioner button on the Patient List as show in Figure 7.1.

If you are using the Solo Practitioner version a window will be displayed (Figure 7.2) where you make changes to show your practice information.

If you are using the Multi Practitioner demo, a list with two practitioner names will appear. You can double click on a name in the list and change the information to you.

This section describes entering information about you as the practitioner using ShrinkRapt. The information you enter here will be used for patient statements and insurance claim forms.

Figure 7.1 Practitioner Information

The screenshot shows the ShrinkRapt software interface. On the left is a sidebar with buttons for 'Bill', 'Add', 'Codes', and 'Get ERAs'. The 'Add' button is highlighted with a red arrow and the text 'Click to add yourself as a practitioner.' The main area displays a 'Patient List' table with 12 records. The table has columns for Name, Last Visit, Home, Cell, Responsible Party, Ttl Balance, and Insured. The data is as follows:

Name	Last Visit	Home	Cell	Responsible Party	Ttl Balance	Insured
Abby, Fred W.	04/18/18		(708) 555-6598	Abby, Fred W. - \$2,196.54	\$2,196.54	Y
Burnett, Brooke	02/24/18		(708) 555-4913	Burnett, Jerry - \$260.00	\$260.00	Y
Cencio, Rigoberto H.	04/12/18		(708) 555-9636	Cencio, Rigoberto H. - \$520.00	\$520.00	
Dogherty, Howard	02/24/18		(708) 555-3579	Dogherty, Howard - \$85.00	\$85.00	
Farnes, Ken	09/10/17		(708) 555-4466	Farnes, Ken - \$170.00	\$170.00	
Masterson, Gail S.	08/13/17	(708) 555-7793	(312) 555-6340	Masterson, Gail S. - \$0.00	\$0.00	
Ramsey, Bill	02/24/18		(798) 555-3359	Ramsey, Bill - \$190.00	\$190.00	
Rook, Curtis F.	09/10/17		(708) 555-6315	Rook, Curtis F. - \$570.00	\$570.00	Y
Scruggs, James	12/01/17		(708) 555-0381	Scruggs, James - \$475.00	\$475.00	Y
Shire, Susan	09/06/17		(708) 267-7296	Shire, Susan - \$85.00	\$85.00	Y
Smith, Buster	04/12/18		(708) 555-9999	Smith, Jonathan - \$450.00	\$450.00	Y
Terry, Michael M.	08/29/17	(708) 555-4604	(708) 555-6818	Terry, Michael M. - \$85.00	\$85.00	

Figure 7.2 Practitioner Entry

Solo Practitioner Entry

Name

Degrees Title

NPI # State License #

Non-NPI Qualifier Non-NPI #

Signature

The following is an explanation of the information stored in each field of the practitioner record:

- **Name** describes your first and last name.
- **Degrees** describes your academic degrees such as PhD or MD. What you enter here will be appended to your name when it is printed on the billing statement and in **CMS box 31**.
- **Title** is where you should enter your professional title such as “Clinical Psychologist”.
- **The field titled License #** is a field label that can be customize to your practice. As an example, if you would like your **NPI#** to

be printed on the billing statement, replace “License #” with “NPI #” and enter your NPI number in the next field. Your NPI

Figure 7.3 Multi Practitioner Entry

Practitioner Entry

Name

Degrees Title

Address

City State Zip

Phones

eMail

NPI # State License #

Non-NPI Qualifier Non-NPI Supervisor

Signature

can then be printed on billing statements.

- **NPI#** is a unique 10-digit identification number issued to health care providers by the Centers for Medicare and Medicaid Services (CMS). The number entered in this field will be printed in **CMS box 24 J**.

- **Non-NPI Qualifier** and **Non-NPI #** are not normally used by insurance companies since an NPI number became required so you do not need to enter this information.
- In the **Signature** field you can paste a digitized signature. This signature will automatically be printed in **CMS box 31**.
- In some cases an insurance company will require that an insurance claim be signed by a practitioner with a higher level of credentials than the practitioner who has provided the service. If you have a supervising practitioner and submit claims to insurance companies with this requirement, go to [Adding a Supervisor](#) to learn how to add a supervising practitioner to a Practitioner record.

About Your Practice

QUICK STEPS

1. Click the Practice icon on the Patient List (Figure 7.4) to enter or make changes to your practice information.

When you begin using ShrinkRapt you will be prompted to enter information such as your practice name, address, and email server so you can email statements to patients. The address information you enter here will be printed in the return address area of Billing Statements and in **box 33** on the CMS insurance claim form. The information can be changed at anytime by clicking the Practice Information button on the Patient List.

Figure 7.4 Practice Information Button

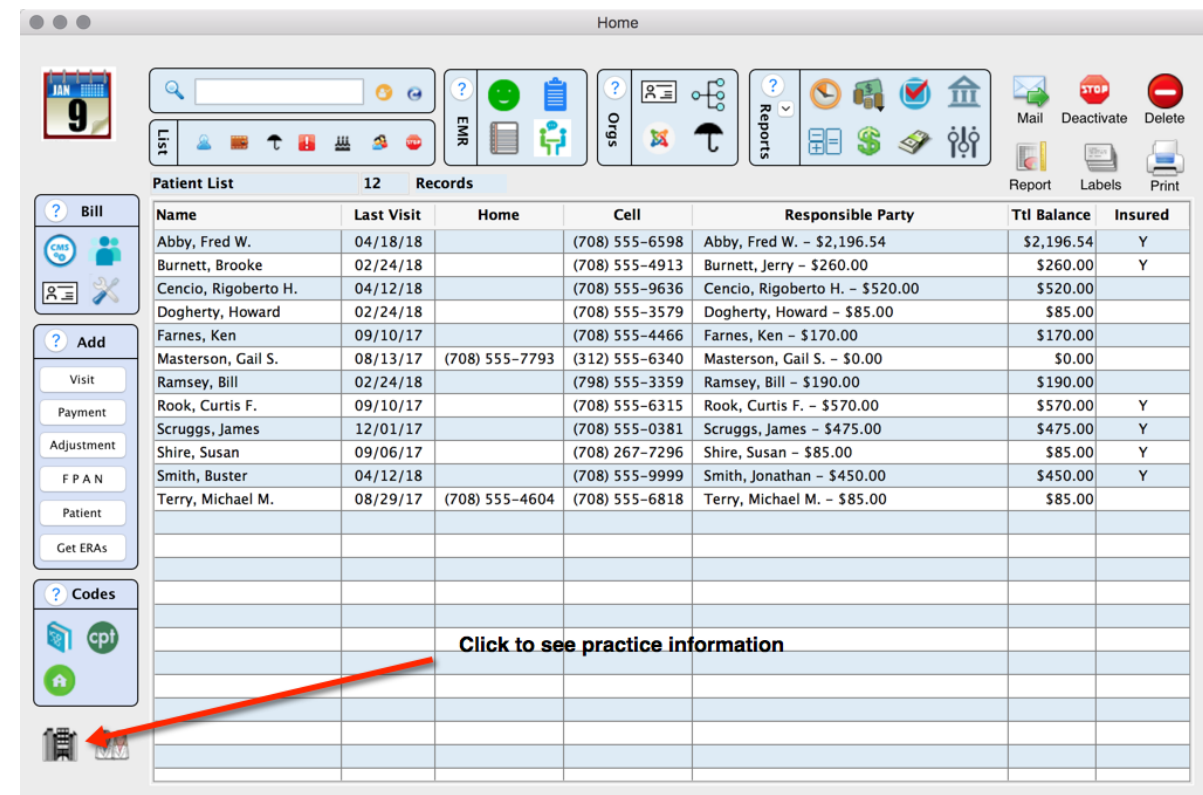


Figure 7.5 Practice Information Entry Window

Practice Information

Practice Name: Associates In Family Counseling

Address: 2345 North Michigan

Suite 345

City: St. Charles State: IL Zip: 60175

Phone: (708) 555-1212

Tax ID #: 59-5555555 ☒ FEIN ☐ SSN

Bank Account Name: My Bank Account

Number: 415-145

NPI #: 1234567893

Non NPI ID: 47Y290PW230

Non NPI Qualifier: 0B

SMTP Server: Port: 465 ☒ Use SSL

SMTP Auth Name:

SMTP Password:

eMail Address: ☒ Copy Self On All Email Sent

Signature:

Cancel OK

Email Address and SMTP field are used when sending email from within ShrinkRapt.

Non-NPI Qualifier and **Non-NPI #** are not normally used by insurance companies since an NPI number became required so you do not need to enter this information.

Below is a description of the other information that should be entered in the Practice Information area.

Tax ID # is where you enter your FEIN or social security number. You should enter the number you use for filing taxes. If you are filing insurance claims for your patients, the number will be printed in **CMS box 25**. In Preferences you can choose to have this number printed on billing statements.

NPI# is a unique 10-digit identification number issued to health care providers by the Centers for Medicare and Medicaid Services (CMS). The number entered in this field will be printed in CMS box 33.

The following fields are optional for entry and are not critical to your using ShrinkRapt for billing and insurance.

Bank Account Name and Number are used to print a deposit slip for the bank.

Preferences

QUICK STEPS

1. Click the Preferences button at the top of the Patient List.
2. Click the tabs at the top of the page to view each page and make changes.
3. Position the cursor over each item to see a description of it's function.



ShrinkRapt can be customized to your specific needs using the Preferences area of ShrinkRapt. Most, if not all, of the settings we have selected will work well for your practice. Go ahead and explore the choices you have clicking the Billing Statement, Insurance, Releases Messages and Paper Choices tab. ShrinkRapt offers the flexibility you want in a billing and insurance program.

Figure 7.6 ShrinkRapt Preferences Window - Page 1

The screenshot shows the 'Preferences' window with the 'Data Entry' tab selected. The window is organized into several sections:

- Diagnostic Code Choice List:** Includes checkboxes for 'My List' and 'Show Only Mental Health Codes'.
- Program Start-up Choices:** Includes a checked 'Check for updates' box. Below it are radio button options for 'Screen to view' (Patient List selected, ShrinkRapt Logo), 'On Screen Transaction List Sort' (Oldest First, Newest First), and 'Schedule View' (Day Sheet, Month Calendar selected).
- Entry Default Values:** Includes a checkbox for 'Auto Format Entries', input fields for 'Zip' (60175) and 'State' (IL), radio buttons for 'Transaction Entry Date' (Current, Last Entry selected), and a checkbox for 'Repeat ICD Codes For Each CPT Entry'.
- User Field Labels:** Includes labels for 'Client Record' (Field 1, Field 2, Field 3) and 'Practitioner License/NPI Label' (State License #).

At the bottom right, there are 'Cancel' and 'OK' buttons.

1. Click the CPT button on the Patient List to display the codes list
2. Click the Usage button to reduce the list to the codes you have used for patients..

The screenshot shows a toolbar with three buttons: a blue circular button with a white 'e' (likely for 'Export'), a black square button (the 'Usage' button), and a light blue circular button with a white question mark. A red arrow points to the black square button.



If your practice uses 100s of different CPT codes, you may want to purchase the complete CPT code list and import it to ShrinkRapt. Please email techsupport@sanersoftware.com for more information if you want to import CPT codes.

Figure 7.7 CPT Code List

[illegible]

Analyzing CPT Usage

ShrinkRapt makes it easy to analyze the types of procedure your practice utilizes the most. The CPT code list displays the number of patients and number of visits that have used the code during the past 12 months. When you click the Usage button, as shown figure 7.9, the code list will display only codes used in the last 12 months.

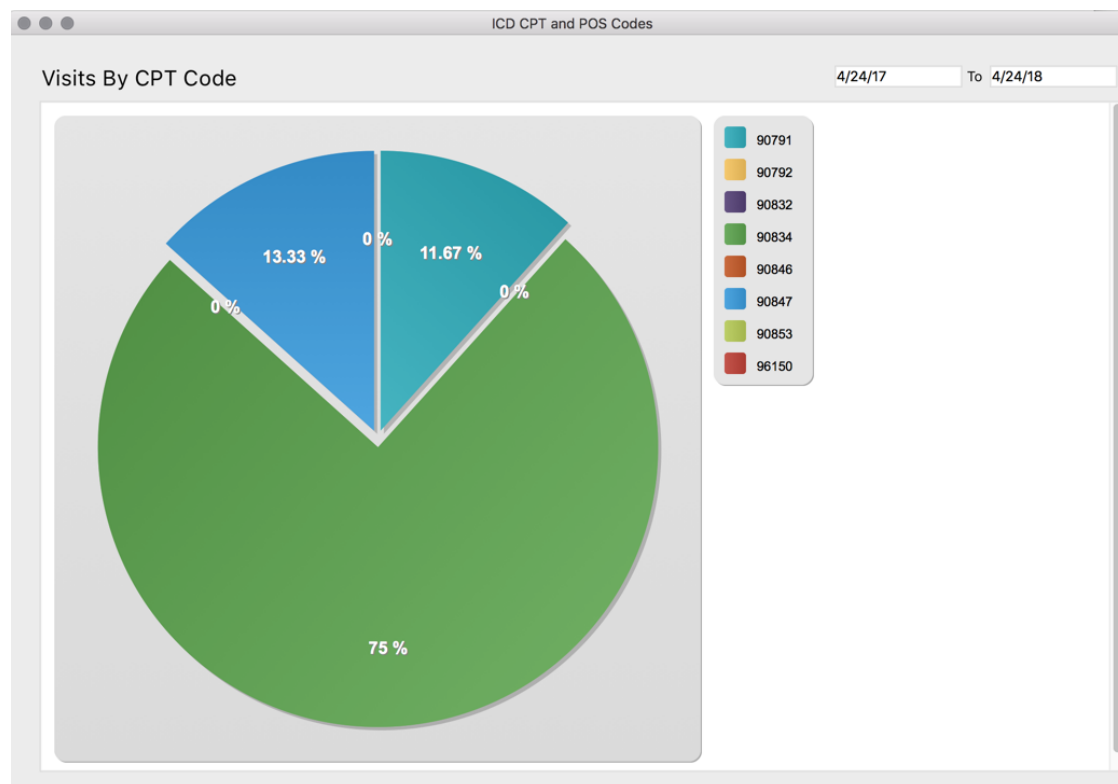
Figure 7.9
Usage Button



Graphing Code Usage

Click the Graph button to view a graph code usage by visit.

Figure 7.8 CPT Code Usage Graph



CPT Code Entry Window

Double click on a code in the list to open the entry window and see a list of patients.

Figure 7.10 CPT Code Entry

ICD Codes

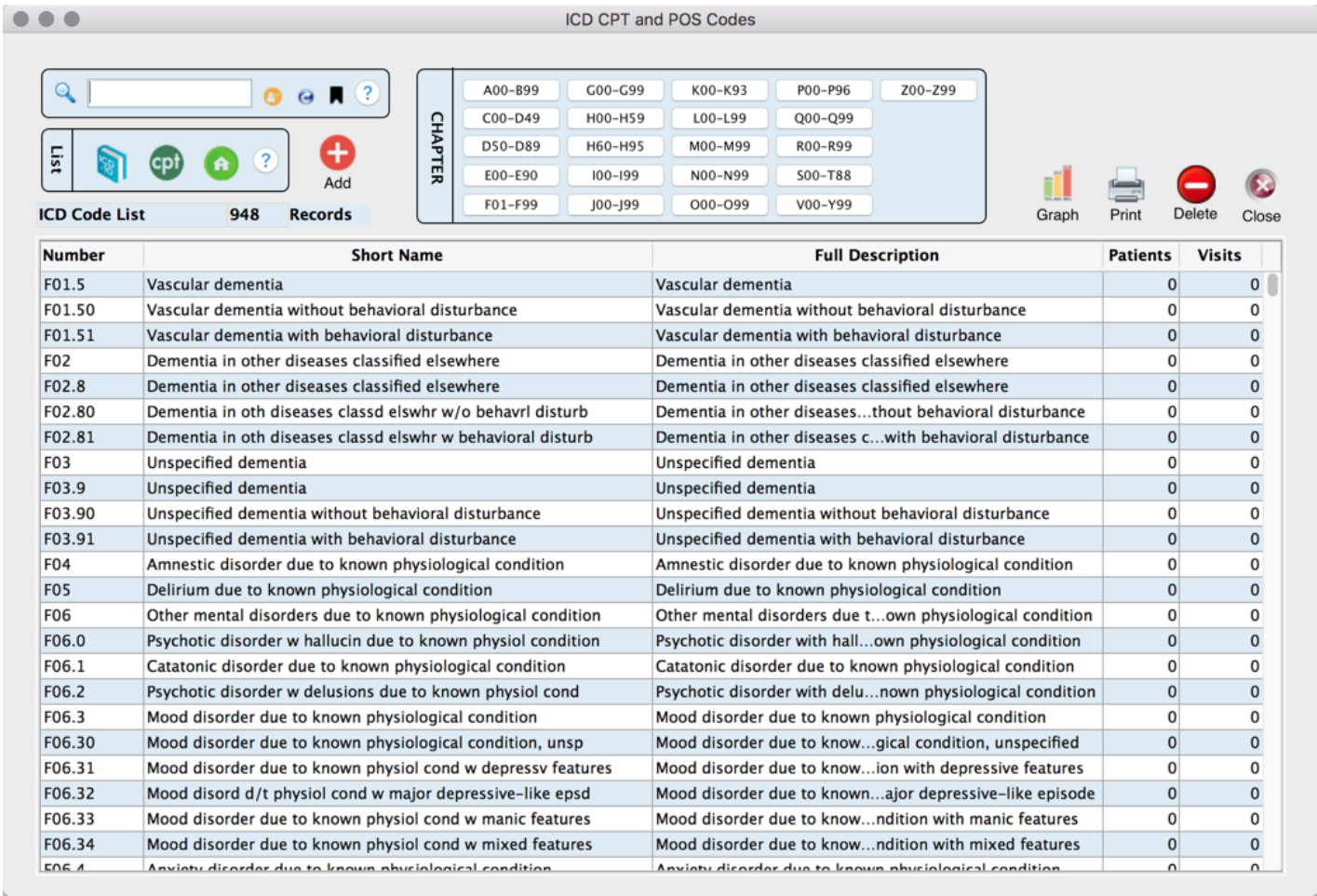
STEPS

- 1. Click the ICD button on the Patient List to display the codes list
- 2. Click the Usage button to reduce the list to the codes you have used for patients.



A complete list of ICD 10 codes comes with ShrinkRapt 2018. The codes are organized by chapters as defined by the world health organization. Click a button in the Chapter area to change the list to those codes. You can double click on any code in the list to view a list of patients with that ICD code.

Figure 7.11 ICD Code List



Analyzing ICD Code Usage

ShrinkRapt makes it easy to analyze the types of ICD 10 codes your practice utilizes the most. The code list displays the number of patients and number of visits that have used the code during the past 12 months. When you click the Usage button, as shown figure 7.13, the code list will display only codes used.

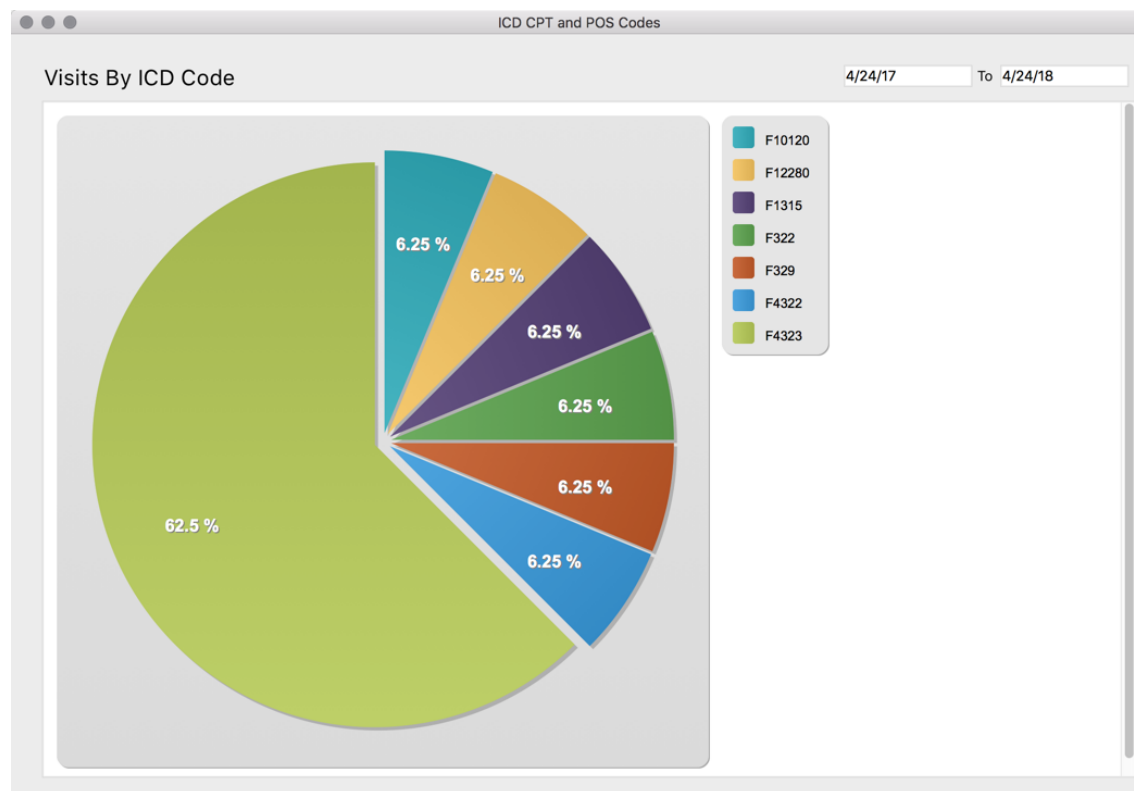
Figure 7.13
Usage Button



Graphing Code Usage

Click the Graph button to view a graph code usage by visit.

Figure 7.12 ICD Code Usage Graph



Code Entry Window

Double click on a code in the list to open the entry window and see a list of patients.

Figure 7.14 ICD Code Entry

ICD CPT and POS Codes

ICD Code

Code Number: ☐ My Codes List

Version:

Short:

Full Description:

Patients

Blackstone, John
Burnett, Brooke
Cencio, Rigoberto H.
Denford, Stanley
Dogherty, Howard
Garnett, Kenny
Masterson, Gail S.
Rook, Curtis F.
Shire, Susan
Terry, Michael M.

Navigation: [Back] [Forward] [Cancel] [OK]

Reports

ShrinkRapt has many pre-designed, ready to use reports. There is also a powerful custom report editor you can use to create your own reports.

Is there a report you need but don't see? Let us know and we might be able to add it for you.

Reports

STEPS

1. Click on an icon in the reports area of the Patient List.
2. Click the Close button to return to the Patient List.
3. Click the down area next to Reports to see more pre-designed reports.

ShrinkRapt comes with many predesigned reports to help you manage your practice. The predesigned reports that can be accessed using the icons on the report bar are:

- * Visits List
- * Aged Balance Report
- * Insurance Authorizations
- * Bank Deposit
- * All Transactions
- * Fees
- * Payments
- * Adjustments

Reports that can be accessed using the reports drop down menu are:

- Clinical Summary
- Patient Activity
- Financial Summary
- Insurance 1099

There is also a custom report creator you can use to create your own reports. Look for the icon in figure 8.2 to create your own reports. Take some time now to play and look at the various reports.

Figure 8.1 Report Bar

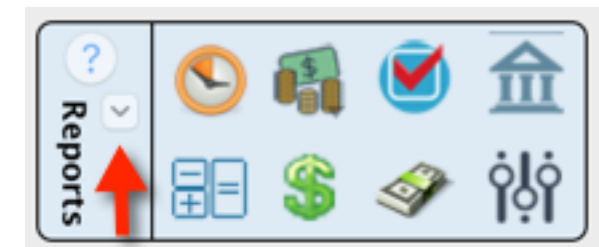
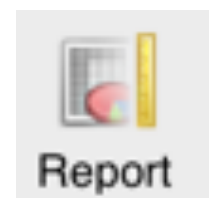


Figure 8.2



What's Next

Thank you for taking time to tour ShrinkRapt 2018. Let's review what you have learned about this powerful, yet easy-to-use, complete EMR, billing and insurance program:

- The Patient List provides an efficient way to access patient information.
- The Day Sheet in the Scheduler is an extremely fast way to enter all your billing information with just a few key strokes and mouse clicks.
- The List button on the home page makes it easy to toggle to various views of patient information including upcoming birthdays, deactivated patients, households, and responsible parties.
- Paper insurance claims are easy to print to the CMS 1500 form with perfect alignment.
- Want to file claims electronically? ShrinkRapt creates a print image file that can be submitted to a clearing house of your choice. Some clearing houses are free.
- There are no annual or monthly fees when you use ShrinkRapt.
- Several pre-designed reports are available to help you be in-touch with your practice clinical and financial well being. Plus, there is a custom report editor you can use to create your own reports.
- As you can see, ShrinkRapt is a valuable tool that no mental health care office should be without. When you put ShrinkRapt to work in your practice, client statements will be mailed sooner and insurance claims will be processed faster and more accurately. Simply put, you are paid sooner!

Thanks again for your time. To order ShrinkRapt 24 hours a day seven days a week, visit our online store at shop.SanerSoftware.com.

Order online at shop.sanersoftware.com.

To ask questions, email Sales@SanerSoftware.com . We want to hear from you!

CMS box 6, 8, 10, 10d, and 12

- Item 6 - Check the appropriate box for patient's relationship to insured when item 4 is completed.
- Item 8 - Form version 08/05: Check the appropriate box for the patient's marital status and whether employed or a student.
- Items 10a through 10c - Check "YES" or "NO" to indicate whether employment, auto liability, or other accident involvement applies to one or more of the services described in item 24. Enter the State postal code. Any item checked "YES" indicates there may be other insurance primary to Medicare. Identify primary insurance information in item 11.
- Item 10d - Use this item exclusively for Medicaid (MCD) information. If the patient is entitled to Medicaid, enter the patient's Medicaid number preceded by MCD.
- Item 12 - The patient or authorized representative must sign and enter either a 6-digit date (MM | DD | YY), 8-digit date (MM | DD | CCYY), or an alpha-numeric date (e.g., January 1, 1998) unless the signature is on file. In lieu of signing the claim, the patient may sign a statement to be retained in the provider, physician, or supplier file in accordance with Chapter 1, “General Billing Requirements.” If the patient is physically or mentally unable to sign, a representative specified in chapter 1, may sign on the patient's behalf. In this event, the statement's signature line must indicate the patient's name followed by “by” the representative's name, relationship to the patient, and the reason the patient cannot sign. The authorization is effective indefinitely unless the patient or the patient's representative revokes this arrangement.
- NOTE: This can be "Signature on File" and/or a computer generated signature.
- The patient's signature authorizes release of medical information necessary to process the claim. It also authorizes payment of benefits to the provider of service or supplier when the provider of service or supplier accepts assignment on the claim.
- Signature by Mark (X) - When an illiterate or physically handicapped enrollee signs by mark, a witness must enter his/her name and address next to the mark.

Related Glossary Terms

Drag related terms here

Index

Find Term

CMS box 24 b

Enter the appropriate place of service code(s) from the list provided in section 10.5. Identify the setting, using a place of service code, for each item used or service performed. This is a required field.

Related Glossary Terms

Drag related terms here

Index

Find Term

CMS box 24 J

Enter the rendering provider’s NPI number in the lower unshaded portion. In the case of a service provided incident to the service of a physician or non-physician practitioner, when the person who ordered the service is not supervising, enter the NPI of the supervisor in the lower unshaded portion.

Related Glossary Terms

Drag related terms here

Index

Chapter 7 - About You
Chapter 7 - About Your Practice

CMS box 25

Enter the provider of service or supplier Federal Tax ID (Employer Identification Number or Social Security Number) and check the appropriate check box. Medicare providers are not required to complete this item for crossover purposes since the Medicare contractor will retrieve the tax identification information from their internal provider file for inclusion on the COB outbound claim. However, tax identification information is used in the determination of accurate National Provider Identifier reimbursement. Reimbursement of claims submitted without tax identification information will/may be delayed.

Related Glossary Terms

Drag related terms here

Index

Find Term

Chapter 7 - About Your Practice

CMS box 31

The providing practitioners name should appear in box 31.

Related Glossary Terms

Drag related terms here

Index

Chapter 7 - About You

CMS box 32

For services payable under the physician fee schedule and anesthesia services, enter the name and address, and ZIP code of the facility if the services were furnished in a hospital, clinic, laboratory, or facility other than the patient's home or physician's office. Effective for claims received on or after April 1, 2004, enter the name, address, and ZIP code of the service location for all services other than those furnished in place of service home - 12. Effective for claims received on or after April 1, 2004, only one name, address and ZIP code may be entered in the block. If additional entries are needed, separate claim forms shall be submitted. Effective January 1, 2011, for claims processed on or after January 1, 2011, submission of the location where the service was rendered will be required for all POS codes.

Providers of service (namely physicians) shall identify the supplier's name, address, and ZIP code when billing for anti-markup tests. When more than one supplier is used, a separate CMS-1500 claim form shall be used to bill for each supplier. (See Pub. 100-04, chapter 1, §10.1.1.2 for more information on payment jurisdiction for claims subject to the anti-markup limitation.)

Related Glossary Terms

Drag related terms here

Index

Find Term

CMS box 33

Enter the provider of service/supplier's billing name, address, ZIP code, and telephone number. This is a required field.

Related Glossary Terms

Drag related terms here

Index

Chapter 7 - About Your Practice