Session 3: Telephone Checklist

- ❑ 1. Compare screen prints and lists for OnStaff 2000 and Intellect.
- ❑ 2.If your provider does NOT have a Tax ID # and is using a SSN, then **Utility →
  Provider, Utility → Provider → Provider,** and **Utility → Provider → Facility** should
  be updated. Verify SSN entered on **Utility → Provider** screen **<Social Security No>** field
  (see page 5).

- ❑ 3. Review provider names are correct on **Utility → Referring** screen as they have gone
  from 1 field to many fields in Intellect. They may need to be updated after the 'Final
  Conversion'.
- ❑ 4. New fields on the **Utility → Provider** screen (see page 5).
- ❑ 5. Anesthesia billing – inform your trainer for proper setup!
- ❑ 6. New fields in the **Utility → Insurance** screens (see page 7).
- ❑ 7. Update and verify information on **Utility → Setup →
  Parameter** screen, including statement options.
- ❑ 8. Verify the **Utility → Facility <Type>** field. When your data is converted this field will
  be set to '77' indicating this field is an office. If you bill for services provided outside of
  your office, such as in a hospital, this field will need to be updated to The appropriate
  facility code to prevent rejected claims.
- ❑ 9. **Utility → Setup → Appt → Template screen <Place of Service>**
  field should be updated before scheduling appointments in Intellect.
- ❑ 10. Verify that Appointment Groups are working properly if set up.
- ❑ 11. The data conversion will correct any out of balance accounts. This will affect your
  reports, causing them to potentially not match between OnStaff 2000 and Intellect.

- [ ] 12. Intellect has a 'Time Out' feature. When a record is kept open more than 10 minutes a warning message will display followed by the record being closed. This length of time is determined per workstation and can be modified.
- [ ] 13. Security levels can change during the conversion process and therefore should be double checked by a system administrator prior to the 'Final Conversion'.
- [ ] 14. HIPAA regulations require that passwords be encrypted meaning PCS can no longer print a list of passwords for you. However, the newest update in Intellect allows your administrator to update, delete or retire passwords without knowing the password.
- [ ] 15. Purge by group is not available in Intellect. Please purge old records before 'Final Conversion' if desired.
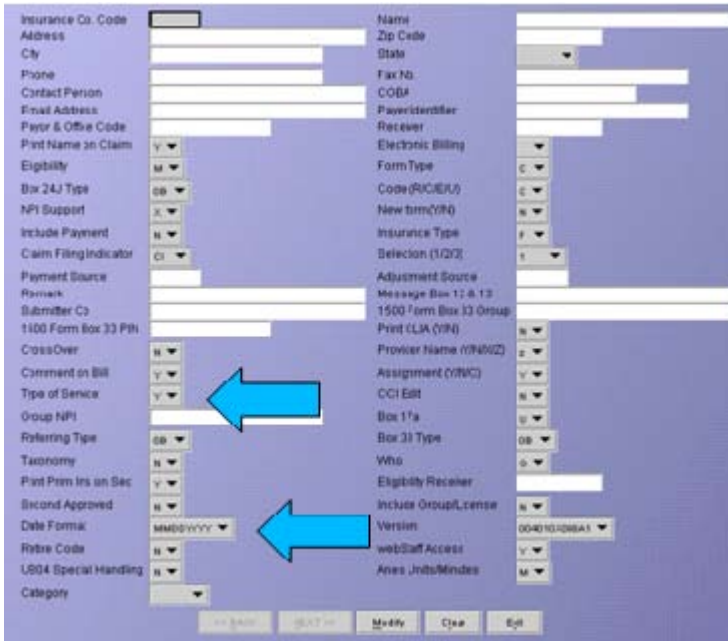
- [ ] 16. **Utility → Insurance → Modify** – Check **<Date Format>** field for insurances requiring a specific format (i.e.: Medi-Cal).
- [ ] 17. **Utility → Insurance → Modify** – Update insurances where the Type of Service **should not be sent electronically.**

Changes made to Intellect during session 3:

➤ _____

➤ _____

➤ _____

➤ _____

➤ _____

➤ _____

➤ _____

Attendee: _____Attendee:_____

Attendee: _____Attendee:_____

Attendee: _____Attendee:_____

Signature: _____ Date:_____

Print Name: _____ Title: _____

*Once complete, please fax back to your trainer as soon as possible. It is very important that ALL check lists be completed and signed in a timely manner so training can continue. Thank you.