

Transaction Editing System (TES) Workfiles



Centricity[®] Business 4.3

Patient Services
Scheduler
Appt Manager
Fin Comments
General Comment
View Fee Schedul
BAR-Dict. Inq
Sched-Dict. Inq.
Referrals
TES Workfiles
Ins. Links
Payment on Acct
Web Credit
Reports
Dailies/Masters

Select Patient ▼
TES Encounter/Transaction Editing

Patient/Encounter Selection

Patient:

Encounter: Alt Ent:

Transaction:

Patient/Encounter Filters

Workfile:

Batch:

OK Cancel

MSU Health Team Training and Education (M-F 8a - 5p)

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Course Objectives

After completing this course, you will be able to:

- Edit encounters and transactions in a work file.
- Edit registration information within a work file
- Change the Status of an edit
- Inquire into encounters.

Introduction to TES

The Transaction Editing System (TES) is a front-end transaction suspense system designed to capture, evaluate, correct, and extract charge and claim transactions into the Centricity Business Billing and Accounts Receivable application.

TES helps to streamline workflow and prevent incomplete or incorrect information on insurance claim forms by:

- Allowing information be entered as it is available.
- Testing for missing or incorrect information.
- Filtering transactions into work files for efficient editing.
- Allowing transactions to be edited for completeness and retested before they are entered into BAR.

TES performs edit evaluations to check the data entered at two points.

- TES checks each encounter with the attempt to file the encounter.
- TES checks encounters during a nightly edit evaluation.

TES provides two options for correcting charges.

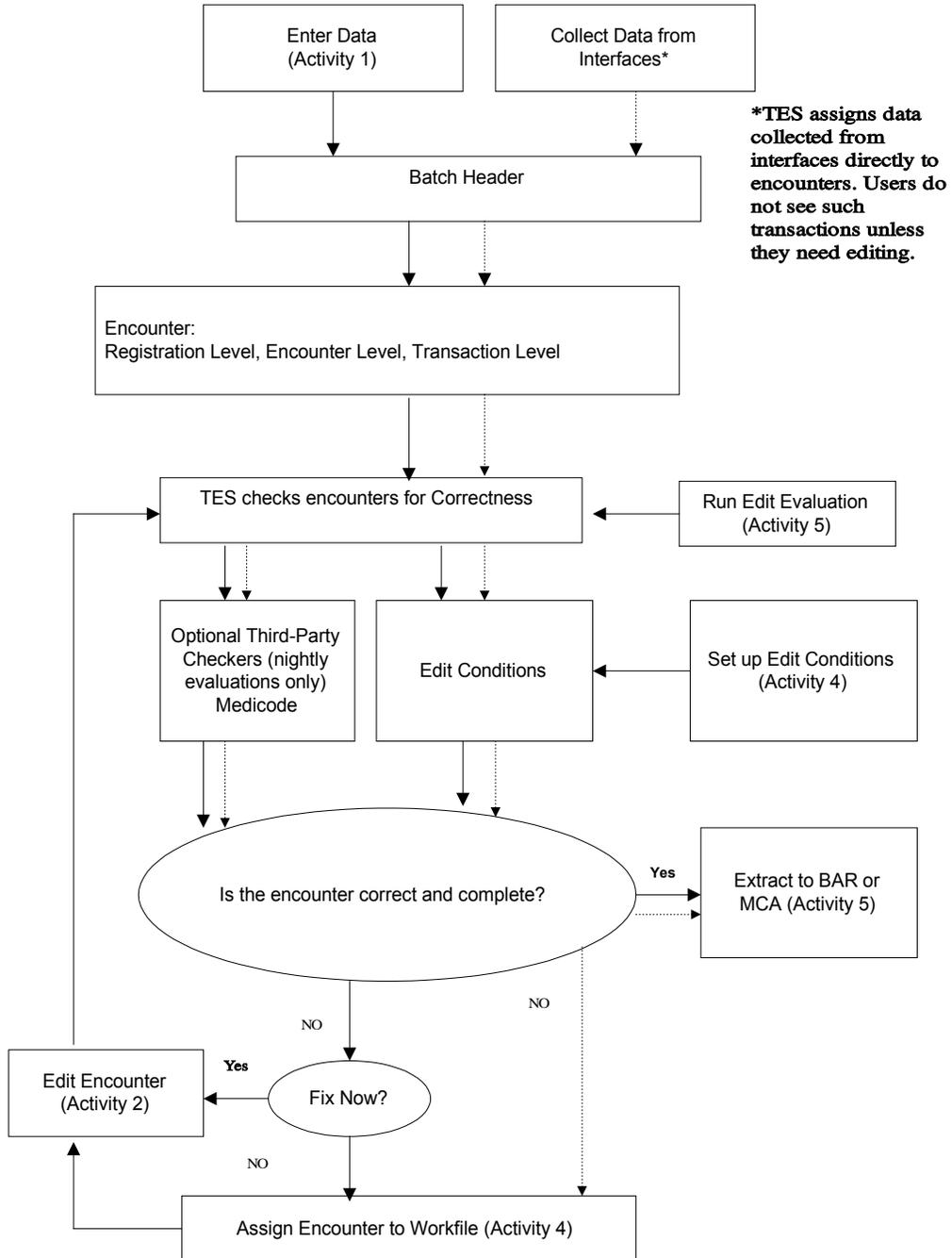
- TES prompts for edits for each encounter with the attempt to file the encounter.
- TES allows the encounter to be filed with the edit to be worked through a work file at a later time to streamline charge entry and to assign the work files to individuals with specific knowledge about the information needed to edit and complete the transaction.

Terminology

Below is a list of terms commonly used in TES:

Term	Description
TES	Acronym for the Centricity Business Transaction Editing System. TES is a charge suspense file that checks data entered up front before they ever enter BAR.
BAR	Acronym for the Centricity Business Billing and Accounts Receivable system. Once TES transactions and encounters are clean and have no edits, they are extracted into the BAR application and filed into the receivables.
TES Edit	System edits are built in the system in order to check data entry. Edits can be specific to a department or specific to a FSC, such as Medicare.
Batch	Encounters can be batched into a logical grouping for balancing and editing purposes.
Work file	TES Edits can be worked through TES work files. A work file is a logical grouping of TES edits.
Encounter	An encounter is usually related to a patient voucher or visit. In BAR, it is called an invoice.
Transaction	A voucher encounter can contain many transactions or services. A transaction is a CPT code entered on the encounter.
Header	The encounter header contains visit level information related to all transactions.
Action Code	One character code that allow you to enter more information.

TES Flowchart



TES Editing

When an encounter is filed, TES automatically checks the data entered against a set of user-defined edit conditions that have previously been entered into the system. Any problems that TES uncovers at this point can be fixed immediately, or the encounter can be filed for someone to fix the edit at a later time. This allows for a more efficient workflow of continuing entering data without having to stop to research incorrect or missing information.

The ability to “save” edits is the core of TES efficiency. TES edits are either worked at the time of charge entry or may be sent to a work file to be worked on later by a specialist or another unit. In this document edits are worked in a work file.

For a complete list of the TES edits MSU will be using, please refer to the Appendix at the end of this document.

Signing into the TES Module

Once you have logged on to the Centricity Business system, Click on **TES Workfiles** on the Vertical Tool Bar.

The screenshot shows the 'TES Encounter/Transaction Editing' window. On the left is a vertical toolbar with the following items: Patient Services, Scheduler, Appt Manager, Fin Comments, General Comment, View Fee Schedule, BAA-Dict. Inq, Sched-Dict. Inq, Referrals, **TES Workfiles** (highlighted), Ins. Links, Payment on Acct, Web Credit, Reports, and Dailies/Masters. The main window has a title bar 'Select Patient' and a subtitle 'TES Encounter/Transaction Editing'. It is divided into two sections: 'Patient/Encounter Selection' and 'Patient/Encounter Filters'. The 'Patient/Encounter Selection' section contains fields for Patient, Encounter, Alt Ent, and Transaction. The 'Patient/Encounter Filters' section contains fields for Workfile and Batch. A large black arrow points to the 'Workfile:' field. At the bottom right are 'OK' and 'Cancel' buttons.

To enter a work file:

Click on the look up button to the right of the “Work file:” field and select the work file to be worked from the list displayed. The work file name, number or Mnemonic could also be entered into the field.

Workfile	Num	Mnemonic	Compiled	Edts	Enc Count	All
BRESLIN CANCER CTR-CP-CBO	62	BCCCCBBO	Not Done	211	0	N
BRESLIN CANCER CTR-FRONT DESK	64	BCCINS	Not Done	43	0	N
BRESLIN CANCER CTR-SENDBACKS	63	BCCSB	Not Done	211	0	N
BRESLIN CANCER IN/OUT REG	8	BREIN/OUT	Not Done	41	0	N
CARDIOLOGY CHM-CP-CBO	59	CARDCHMCPC	Not Done	211	0	N
CARDIOLOGY CHM-FRONT DESK	61	CARDCHMINS	Not Done	43	0	N
CARDIOLOGY CHM-SENDBACKS	60	CARDCHMSB	Not Done	211	0	N
CARDIOLOGY-CHM IN/OUT	408	CARD	Not Done	41	0	N
Charges with ClaimsManager Edits	3	CMEdits	Not Done	0	0	N

At the bottom of the window are 'Actions', 'OK', and 'Cancel' buttons.

Select a work file and click **OK**.

Select Patient▼

TES Encounter/Transaction Editing

Patient/Encounter Selection

Patient:

Encounter: **Alt Ent:**

Transaction:

Patient/Encounter Filters

Workfile: CNS-FRONT DESK

Batch:

Patient Name	Encounter	Alternate	Status	ServDate	Txns	Total
DUCK,DAFFY DUFFY	1056		Open	12/06/2010	1	177.00

TES Function Menu

Once the work file is entered, the action code menu displays at the bottom of the screen.

I Move Encounter	I Invoice Inquiry	R View Reg	W Workfiles
A Edit Reg	M Move Encounter	S Change Ent Status	X Delete Encounter
B More Actions...	P Patient Inquiry	T Ent Totals	Y Audit Trail
C Edit Trans	Q Display Edits	V View Header	Z Display Trans
E Edit Header			

Your TES Activity menu may have different options than those shown above, depending upon your security access.

Work files will consist of encounters (a visit) and one or more transactions (services provided such as an office visit and an injection. Some Edits are worked on both the encounter (header level) and a transaction level. These will be discussed later in this document.

Editing TES Encounters and Transactions

- Highlight an encounter listed in the work file by pressing the up or down arrow or clicking on the line of the encounter and then pressing enter. (Note: The patient name is a hyperlink and will take you to the registration pop up screen.)
- Use the action codes displayed at the bottom of the screen to perform the desired action.
- To see what the encounter is in the work file click on the “Q” action code to display the edit(s).

Select Patient▼

TES Encounter/Transaction Editing

Patient/Encounter Selection
Patient:
Encounter: Alt Ent:
Transaction:

Patient/Encounter Filters
Workfile: CNS-FRONT DESK
Batch:

Patient Name	Encounter	Alternate	Status	ServDate	Txns	Total
DUCK,DAFFY DUFFY	1056		Open	12/06/2010	1	177.00

Actions:

- I Move Encounter
- A Edit Reg
- B More Actions...
- C Edit Trans
- E Edit Header
- I Invoice Inquiry
- M Move Encounter
- P Patient Inquiry
- Q Display Edits
- R View Reg
- S Change Ent Status
- T Ent Totals
- V View Header
- W Workfiles
- X Delete Encounter
- Y Audit Trail
- Z Display Trans

Actions ▼ OK Cancel

Highlight the work file encounter and click on “Q” action code. Note this work file one encounter with one transaction.

The Edit Selector Screen will display all edits connected to the encounter

Edit Selector Header

Patient: DUCK,DAFFY DUFFY **Encounter:** 1056 **Alt Ent:**
Created: 12/07/2010 11:08A **TES User:** MSUTRAIN01 **Status:** Open

<input type="checkbox"/> Edit Condition	Sys	Edit Group	Type	Lev	Txn	Action
<input type="checkbox"/> REG-MISSING PATIENT ADDRESS	TES	INSURANCE	STA	Txn	1	
<input type="checkbox"/> REG-MISS PATIENT ZIP CODE	TES	INSURANCE	STA	Txn	1	
<input type="checkbox"/> REG-MISSING/INVALID PATIENT CITY/STATE	TES	INSURANCE	STA	Txn	1	

[Display Edit Description](#)

To view the detail regarding a particular edit, highlight the edit and click on the “D” action code button at the bottom of the screen.

TES Encounter/Transaction Editing

Edit Condition Description

You need to have a patients street address. Please go into registration and enter the patient's address.

When you have viewed the Edit detail, click “OK” to return to the edit list screen.

In the above example the edit requires a registration edit action.

TES Encounter/Transaction Editing

Patient/Encounter Selection
Patient: DUCK,DAFFY DUFFY
Encounter: 1056 **Alt Ent:**
Transaction:

Patient/Encounter Filters
Workfile: CNS-FRONT DESK
Batch:

Patient Name	Encounter	Alternate	Status	ServDate	Txns	Total
DUCK,DAFFY DUFFY	1056		Open	12/06/2010	1	177.00

I Move Encounter I Invoice Inquiry R View Req W Workfiles
A Edit Req M Move Encounter S Change Ent Status X Delete Encounter
B More Actions... P Patient Inquiry T Ent Totals Y Audit Trail
C Edit Trans Q Display Edits V View Header Z Display Trans
E Edit Header

Actions ▼ OK Cancel

Click on action code “A” to add the patient’s address, city, state and zip code. The following pop-up box appears. Enter 1 in the Selection field and click “OK”. You will be taken to demographic registration where you will enter the information needed and save by clicking OK. This completes the actions to clear edit for the encounter.

Centricity® Business

Registration Edit

Registration Edit options:
 1) Reg only, 2) FSCs only, 3) Case only, 4) All

Selection:

OK Cancel

TES encounter edits that include multiple transactions (services).

Sometimes encounters that contain edits may have multiple transactions.

Again, highlight the encounter and click on action code “Q” to display the edits.

TES Encounter/Transaction Editing

Patient/Encounter Selection
 Patient:
 Encounter:
 Transaction:

Patient/Encounter Filters
 Workfile: INTERNAL MEDICINE CHM-F
 Batch:

Patient Name	Encounter	Alternate	Status	ServDate	Txns	Total
MOUSE,MINNIE	1040		Open	09/23/2010	3	99.00
MOUSE,MICKEY	1061		Open	01/07/2011	1	108.00
DUCK,DAFFY DUFFY	1062		Open	01/07/2011	1	236.00

Move Encounter
 Invoice Inquiry
 View Req
 Workfiles
 Edit Reg
 Move Encounter
 Change Ent Status
 Delete Encounter
 More Actions...
 Patient Inquiry
 Ent Totals
 Audit Trail
 Edit Trans
 Display Edits
 View Header
 Display Trans
 Edit Header

Actions ▼

This encounter has one edit for transaction # 1

MOUSE,MINNIE
 MRN: 4315216
 DOB: 01/01/1946 (F-65 yrs)
 TEL: H: (517)349-8885 W: (517)241-9966
 PCP: AD
 OLIN:
 ADD: 123 CHEESE RD
 C:
 GUAR:
 INS: BP
 CITY/ST/ZIP: LANSING,MI 48917
 UPDS: R-0

Edit Selector Header

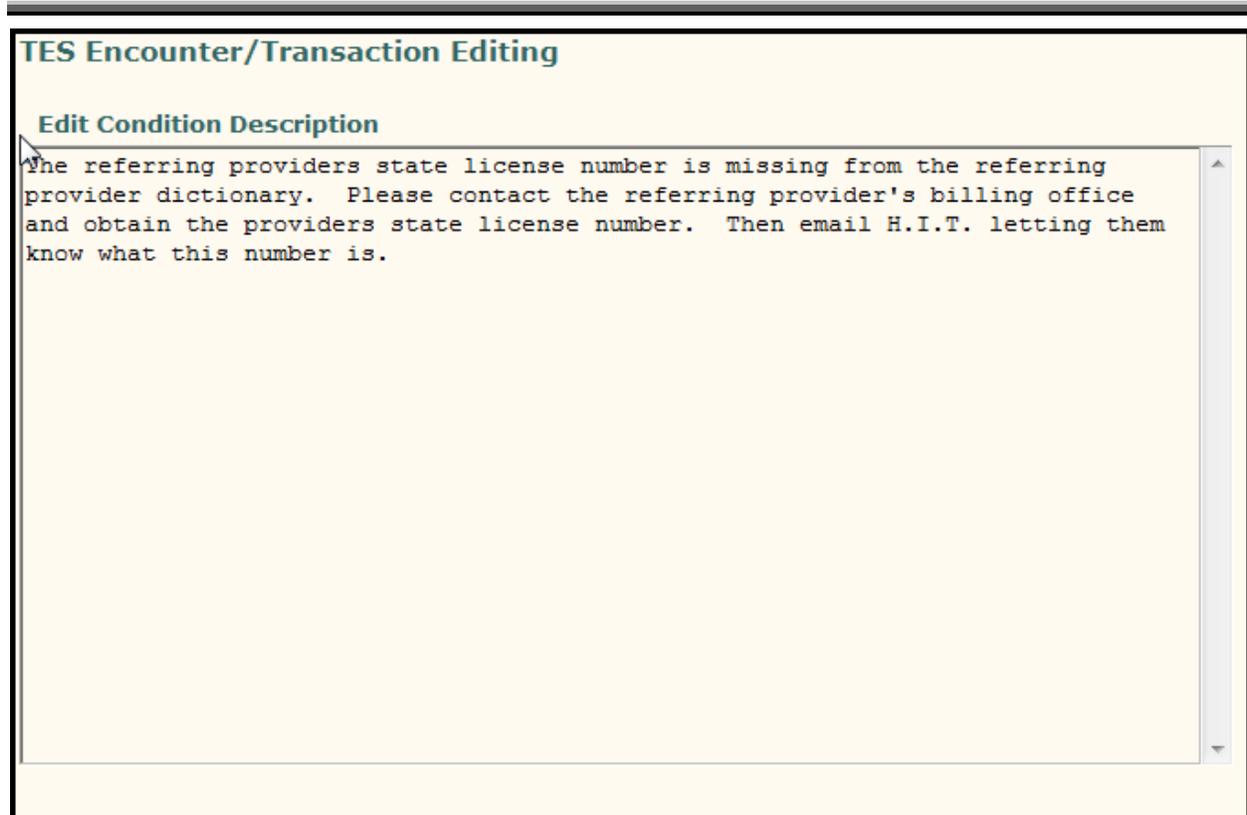
Patient: MOUSE,MINNIE
Encounter: 1040
Alt Ent:
Created: 11/12/2010 12:41P
TES User: MSUTRAIN02
Status: Open

Edit Condition	Sys	Edit Group	Type	Lev	Txn	Action
FD-BS-MISSING REF PHYS SL#	TES	INFORMATION S...	STA	Txn	1	

Display Edit Description

Actions ▼

Click on D to display the edit description



The screenshot shows a software window titled "TES Encounter/Transaction Editing". Inside the window, there is a section titled "Edit Condition Description". A mouse cursor is pointing at the start of the text in this section. The text reads: "The referring providers state license number is missing from the referring provider dictionary. Please contact the referring provider's billing office and obtain the providers state license number. Then email H.I.T. letting them know what this number is."

This edit description instructs to contact referring provider for state license number. The link on the Vertical Tool Bar in Centricity Business can also be used to access the National Provider Registry for the state license number. The license number can be sent to HIT through an e-mail or the Provider Information page in Patient Demographics can also be used to complete the fields for an update request.

Some encounters in a work file have edits for multiple transactions. These may require editing a “header” (Action Code “E”) and editing one or more transactions within the encounter (Action code “C”).

The following screen shows encounter 1067 has 2 transactions with edits. The encounter is highlighted and then action code “Q” is clicked on to display the edits.

TES Encounter/Transaction Editing

Patient/Encounter Selection
Patient: MOUSE,MICKEY
Encounter: 1067 **Alt Ent:**
Transaction:

Patient/Encounter Filters
Workfile: INTERNAL MEDICINE CHM-F
Batch:

Patient Name	Encounter	Alternate	Status	ServDate	Txns	Total
MOUSE,MINNIE	1040		Open	09/23/2010	3	99.00
MOUSE,MICKEY	1061		Open	01/07/2011	1	108.00
MOUSE,MICKEY	1067		Open	01/07/2011	2	118.00
DUCK,DAFFY DUFFY	1066		Open	01/07/2011	2	85.00

Ⓜ Move Encounter
 Ⓜ Invoice Inquiry
 Ⓡ View Reg
 Ⓦ Workfiles
Ⓐ Edit Reg
 Ⓜ Move Encounter
 Ⓢ Change Ent Status
 ⓧ Delete Encounter
Ⓑ More Actions...
 Ⓟ Patient Inquiry
 Ⓣ Ent Totals
 Ⓨ Audit Trail
Ⓒ Edit Trans
 Ⓞ Display Edits
 Ⓥ View Header
 Ⓩ Display Trans
Ⓔ Edit Header

Actions ▾ **OK** **Cancel**

Here is the edit description of this encounter where there are multiple transactions with edits.

Note : Transaction 1 has an edit for missing address.

Transaction 2 has 2 edits, one for missing address and one for missing referring provider

Edit Selector Header

Patient: MOUSE, MICKEY
Created: 01/07/2011 3:32P
Encounter: 1067
TES User: MSUTRAIN02
Alt Ent:
Status: Open

<input type="checkbox"/> Edit Condition	Sys	Edit Group	Type	Lev	Txn	Action
<input type="checkbox"/> REG-MISSING PATIENT ADDRESS	TES	INSURANCE	STA	Txn	1	
<input type="checkbox"/> FD-REFERRING DR REQUIRED FOR LAB	TES	MISS/INVALID D...	STA	Txn	2	
<input type="checkbox"/> REG-MISSING PATIENT ADDRESS	TES	INSURANCE	STA	Txn	2	

Display Edit Description

Actions

The first edit for missing address can be corrected by using Action code "A" to edit registration and add the missing address. This will resolve the edit that displays on both transactions 1 and 2.

The edit for "Referring Dr Required For Lab" needs to be corrected on **Transaction 2** for the encounter (not transaction 1) and on the header of the encounter. Click "OK" to return to the action codes to fix the edit.

Example of an edit requiring a correction at the “Header” and Transaction” Level.

Transaction 2

Patient/Encounter Selection
Patient: Encounter: Transaction:
Alt Ent:

Patient/Encounter Filters
Workfile: INTERNAL MEDICINE CHM-F
Batch:

Patient Name	Encounter	Alternate	Status	ServDate	Txns	Total
MOUSE,MINNIE	1040		Open	09/23/2010	3	99.00
MOUSE,MICKEY	1061		Open	01/07/2011	1	108.00
MOUSE,MICKEY	1067		Open	01/07/2011	2	118.00
DUCK,DAFFY DUFFY	1066		Open	01/07/2011	2	85.00

Actions: [OK] [Cancel]

With the Encounter highlighted Click on action code “E”, Edit Header.

The following screen “Encounter Details” will display

TES Encounter/Transaction Editing - Encounter Details

Patient: MOUSE, MICKEY MRN: 4422303 Encounter: 1067
Created: 01/07/2011 3:32P User: MSUTR/ Status: Open Alt Ent:

Sch Appt: Ser Date: 01/07/11 Reg Flow: 319,91,1 FSC: 319
Provider: ZAROUKIAN M BillArea: GENERAL M Div: CHM INTER
Adm Date: 01/07/2011 Dis Date: Pri Auth: RefPhy:
Inj Date: Referral: LastEval: 01/07/2011 Location: CC Comts?: N
Group: 3

Diag 1 : 485 O: Desc: BRONCHOPNEUMONIA ORGANISM UI
2 : O: Desc:
3 : O: Desc:
4 : O: Desc:
5 : O: Desc:
6 : O: Desc:

Page: Actions... [OK] [Cancel]

Enter the referring providers last name in the “RefPhy:” field and click OK twice.

You are now back to the screen that displays the encounter that has an edit.

Click on action "E" Edit Transaction making sure you have correct encounter still highlighted.

Click "OK"

TES Encounter/Transaction Editing

Patient/Encounter Selection
Patient:
Encounter: Alt Ent:
Transaction:

Patient/Encounter Filters
Workfile: INTERNAL MEDICINE CHM-F
Batch:

Patient Name	Encounter	Alternate	Status	ServDate	Txns	Total
MOUSE,MINNIE	1040		Open	09/23/2010	3	99.00
MOUSE,MICKEY	1061		Open	01/07/2011	1	108.00
MOUSE,MICKEY	1067		Open	01/07/2011	2	118.00
DUCK,DAFFY DUFFY	1066		Open	01/07/2011	2	85.00

Actions:

- I** Move Encounter
- A** Edit Req
- B** More Actions...
- C** Edit Trans
- E** Edit Header
- I** Invoice Inquiry
- M** Move Encounter
- P** Patient Inquiry
- Q** Display Edits
- R** View Req
- S** Change Ent Status
- T** Ent Totals
- V** View Header
- W** Workfiles
- X** Delete Encounter
- Y** Audit Trail
- Z** Display Trans

Actions ▼ **OK** **Cancel**

The Transaction Detail Screen will display. Note: The first transaction displays but remember it did not have an edit for missing referring physician.

MOUSE, MICKEY : *****ALERT***** DOB: 08/12/1939 (F-71 yrs) TEL: H: (517)349-5588 W: PCP: **INS: BMAD,ASI**
 MRN: 4422303 ADD: CITY/ST/ZIP: LANSING,MI 48912 C: GUAR: MOUSE,MINNIE ((517)349-8885) UPDS: R-01/07/2011, I-11/29/2010
 OLIN: Select Patient ▼

TES Encounter/Transaction Editing - Transaction Details

Patient: MOUSE, MICKEY Mrn: 4422303 Encounter: 1067

Created: 01/07/2011 3:32P User: MSUTRAIN02 TES Batch: 109
 Last Mod: 01/07/2011 4:15P User: MSUTRAIN02 Status: Edits

Procedure: 99213
 Desc Over: ▼ Proc Desc: ESTABLISHED PATIENT EXPANDED EXAM

Sch Appt: [] Prior Auth: []
 Modifier: [] Serv Date: 01/07/2011 Thru Date: []
 Hospital: [] Admit Date: 01/07/2011 Dis Date: []
 Units: 1 Unit Amt: 108.00 Total Amt: 108.00

Primary Dx: 485
 Dx List: 485

Reg Flow: 319,91,1 FSC: 319 Referral: []
 Provider: 3410 Prov Name: ZAROUKIAN MI Ref Phys: []
 Bill Area: MED Location: CC Division: CHM INTERNA
 Disc Type: [] Disc %: [] Group: 3
 Orig Amt: 108.00 Adjust Amt: 0.00 Ext Amt: 0.00

Page ▼ Actions... OK Cancel

Click on the down arrow on your keyboard and the second transaction displays.

TES Encounter/Transaction Editing - Transaction Details

Patient: MOUSE, MICKEY Mrn: 4422303 Encounter: 1067

Created: 01/07/2011 3:32P User: MSUTRAIN02 TES Batch: 109
 Last Mod: 01/07/2011 4:15P User: MSUTRAIN02 Status: Edits

Procedure: 81000
 Desc Over: ▼ Proc Desc: URINALYSIS WITH MICROSCOPY

Sch Appt: [] Prior Auth: []
 Modifier: [] Serv Date: 01/07/2011 Thru Date: []
 Hospital: [] Admit Date: 01/07/2011 Dis Date: []
 Units: 1 Unit Amt: 10.00 Total Amt: 10.00

Primary Dx: 485
 Dx List: 485

Reg Flow: 319,91,1 FSC: 319 Referral: []
 Provider: 3410 Prov Name: ZAROUKIAN MI Ref Phys: []
 Bill Area: MED Location: CC Division: CHM INTERNA
 Disc Type: [] Disc %: [] Group: 3
 Orig Amt: 10.00 Adjust Amt: 0.00 Ext Amt: 0.00

Page ▼ Actions... OK Cancel

Here you will enter the last name of the Referring provider in the field indicated.

Click "OK" twice. The edit is fixed. You are on the Work File Patient/Encounter Selection screen. Work remaining encounters not yet worked. Then Click OK to exit.

Additional Action Codes Available When Editing from Work Files

Work files are groups of edits that have been organized for efficient editing. Some work files will include only certain types of edits, and some may include only those edits in encounters created by specific users.

The action codes for the Encounter/Transaction Editing screen are described in the table below.

Action Code:	Description:
1-Move Encounter	➤ Moves an encounter from one patient account to another
A-Edit Reg	➤ Edits patient registration information, such as demographic, insurance and case data.
B-More Actions	<ul style="list-style-type: none"> ➤ Displays the following additional action codes: ➤ B-Batch Totals <ul style="list-style-type: none"> ○ Displays summary totals for a selected batch. ○ This action code only works when you display the Patient/Encounter Selector by using the Batch filter to first select a batch. ➤ W-Work file Totals <ul style="list-style-type: none"> ○ Displays summary totals for a selected work file. ○ This action code only works when you use the Work file filter to first select a work file to display the Patient/Encounter Selector.
C- Edit Transactions	○ Allows you to edit transactions within an encounter
E-Edit Header	<ul style="list-style-type: none"> ➤ Opens the TES Header Screen for editing. ➤ TES checks the encounter and displays the Edit Conditions selector if it finds errors.
I-Invoice Inquiry	<ul style="list-style-type: none"> ➤ Displays BAR invoice information for the patient. ➤ If no invoice exists, the system will display an error message.
M-Move Encounter	➤ Moves the TES encounter to another patient.
P-Patient Inquiry	➤ Displays the information from Function 49-Patient Inquiry .

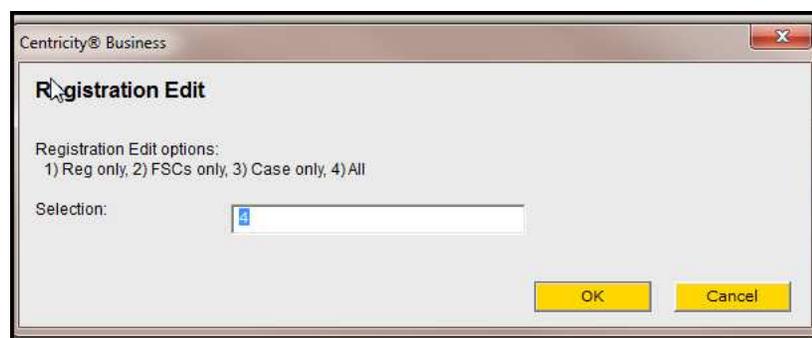
Action Code: Description:

Q-Display Edits	➤ Displays the Edit Condition Selector Screen , which lists open edit conditions for this encounter.
R-View Reg	➤ Views the patient registration information on this patient.
S-Change Ent Status	➤ Changes the status of the encounter.
T-Ent Totals	<ul style="list-style-type: none"> ➤ Displays summary information about the encounter. ➤ The system will display: <ul style="list-style-type: none"> ○ the number and dollar amount of the original transactions entered ○ open transactions ○ extracted transactions ○ deleted transactions ○ transactions on hold ○ transactions with unresolved edits ○ transactions forced to BAR ○ clean transactions waiting for extraction ○ transactions edited from their original amount ○ purged transactions ○ current transactions.
V-View Header	➤ Views the Header Screen .
W-Work files	➤ Displays a selector list of work files that apply to a selected encounter.
X-Delete Encounter	<ul style="list-style-type: none"> ➤ Deletes the encounter, providing all transactions in the encounter have been deleted first. ➤ If you try to delete an encounter that contains transactions or has been extracted, TES displays an error message.
Y-Audit Trail	<ul style="list-style-type: none"> ➤ Displays the Header Audit Trail Screen. The Audit Trail displays the screen as it appeared each time you filed the encounter, allowing you to see a history of changes made to the encounter. ➤ Use the up and down arrow keys to view earlier versions and return to later versions.
Z-Display Trans	➤ Displays the Transaction Selector Screen for the encounter.

A few of the most common action codes that are used for editing purposes are detailed below:

➤ Editing Registration Information

- Highlight the encounter to edit.
- Enter or click on action code **A** (or click on the patient name hyper link)
- The selection pop up screen will appear.



- Select: 1) **Reg only**, 2) **FSCs only** 3) **Case only** 4) **All**
- Edit the necessary information
- Click on **OK** to file the changes or **Cancel** to exit the registration area without saving changes. The system will return to the **Encounter Selector** screen.

➤ Editing Header Information

- Highlight the encounter to edit.
- Enter action code **<E>**
- Edit the necessary fields.
- Click **OK** to file the changes. If any edits are found upon filing, the **Edit Condition** selector will display the encounters.
- Select an Edit Condition.
- Press **<D>** to view a description of the edit.
- Click **OK** to return to the edit screen to make corrections.
- Click **OK** to file the encounter and return to the **Encounter Selector** without making further edits.

➤ Move Encounter

- Enter a new patient name.
- Press **Tab**.
- At the **Are you sure you want to move the encounter** prompt, enter **<Y>**.

- Press OK to file the change.

➤ Displaying Edits

- Highlight the encounter to view the edit conditions.
- Enter action code <Q>
- Highlight the edit conditions to view description of the edits.
- Press <D>.
- Press OK to display the next edit selected.
- Press OK to return to the **Edit Conditions selector screen**. OK will also return to the **Edit Conditions selector screen** after the last edit condition is selected.

➤ Changing the Encounter Status

- Highlight the encounter to view its status.
- Enter action code <S>
- Click on Magnifying Glass to display a list of the valid options. Select option
- Click to accept the change or **Cancel** to leave this form without changing the encounter status

➤ Viewing Header Information

- Highlight the encounter to view the header information.
- Enter action code <V>

Once in the Header screen you can move to different TES Data Screen pages by using the <Page> or <arrows>

Transaction Selection Screen

- Click on action code **Z-Display Trans.**

TES Encounter/Transaction Editing

Patient/Encounter Selection
Patient: DUCK,DAFFY DUFFY
Encounter: 1066 **Alt Ent:**
Transaction:

Patient/Encounter Filters
Workfile: INTERNAL MEDICINE CHM-F
Batch:

<input type="checkbox"/>	Txn	Status	Procedure	Provider	Ser Date	Fsc	Diag	Mod	Un	Unit Amt	Total Amt
<input type="checkbox"/>	1	Clean	99212	ZAROUKIA...	01/07/2011	91	485		1	75.00	75.00
<input type="checkbox"/>	2	Edits	81000	ZAROUKIA...	01/07/2011	91	485		1	10.00	10.00

C [Change Multiple Trans](#)
 Q [Display Edits](#)
 X [Delete Trans](#)
 E [Edit Trans](#)
 S [Change Trans Status](#)
 Y [Audit Trail](#)
 H [Reset Trans Display](#)
 V [View Trans](#)
 Z [Split Encounter](#)
 M [Move Trans](#)

Transaction Selector Screen

- Select a transaction by highlighting the transaction you want to view the detail on, and press the **<Enter>** key to select it.
- Click on the action codes **V** to view the **Transaction Detail** screen for the selected transaction, or use one of the action codes at the bottom of the selector screen to edit or view transaction information.

Transaction Selector Screen Action Codes

Action codes at the bottom of the **Transaction Selector Screen** give you a variety of editing options.

The action codes for the **Transaction Selector Screen** are described in the table below.

Action Code:**Description:**

C-Change Multiple Trans	<ul style="list-style-type: none">➤ Opens the Transaction Quick Change Form for the selected transactions.➤ Makes multiple changes at once to more than one transaction at a time.➤ <i>Be careful using this form.</i> TES does not display the old values of any of the transactions you are editing. It is easy, therefore, to make changes that you do not intend to make to some transactions.
E-Edit Trans	<ul style="list-style-type: none">➤ Displays the Transaction Detail edit screen for the highlighted transaction.
M-Move Trans	<ul style="list-style-type: none">➤ Moves the transaction to another encounter for the same patient.
Q-Display Edits	<ul style="list-style-type: none">➤ Displays the Edit Conditions selector list for the highlighted transaction.
S-Change Trans Status	<ul style="list-style-type: none">➤ Change the status of the transaction.
V-View Trans	<ul style="list-style-type: none">➤ Displays the Transaction Detail screen for the highlighted transaction.
X-Delete Trans	<ul style="list-style-type: none">➤ Deletes the selected transaction.
Y-Audit Trail	<ul style="list-style-type: none">➤ Displays audit trail screens for the transaction. The audit trail displays the transaction screen as it appeared each time you filed the encounter, allowing you to see a history of changes made to the transaction. Use the <Up Arrow> and <Down Arrow> keys to view earlier and later versions.➤ Note that you can view, but not edit information in audit trail screens.

Send Back Work Files

A send back work file is a work file that holds encounters that are being returned from the billing unit requesting additional or corrected information for a charge received in their unit with missing or incorrect information.

The charge will be sent back to you via a “Send Back” work file. This work file is worked based on the comment attached to the patient’s encounter regarding what is needed from the clinic in order to process the claim form.

TES Encounter/Transaction Editing

Patient/Encounter Selection
Patient:
Encounter: Alt Ent:
Transaction:

Patient/Encounter Filters
Workfile:
Batch:

<input type="checkbox"/> Workfile	Num	Mnemonic	Compiled	Edts	Enc Count	All
<input type="checkbox"/> CHM PEDS SPB CBO CP	70	PEDSSPBCBO	Not Done	234	0	N
<input type="checkbox"/> CHM PEDS SPB FRONT DESK	72	PEDSSPBINS	Not Done	44	0	N
<input type="checkbox"/> CNS-BA CP 447	447	CNS447	Not Done	234	0	N
<input type="checkbox"/> CNS-CP CBO	30	CNSCP	Not Done	234	1	N
<input checked="" type="checkbox"/> CNS-CP-SEND BACK	100	CNSCB	Not Done	235	1	N
<input type="checkbox"/> CNS-FRONT DESK	31	CNSINSREG	Not Done	44	0	N
<input type="checkbox"/> CNS-IN/OUT REG	126	CNSIO	Not Done	44	0	N
<input type="checkbox"/> CNS-PRIOR 12/1/05	102	CNSPRI	Not Done	193	0	N
<input type="checkbox"/> CNS-TEMP EDITS TO WORK BY CNS	207	CNST	Not Done	5	0	N

Actions ▼ **OK** Cancel

Click on the send back work file for your clinic and click the yellow “OK” button.

The encounters sent back by the billing unit will be listed in your work file.

SCHEDULING,PATIENT A : MRN: 134137 DOB: 12/08/1936 (F-74 yrs) TEL: H: (517)655-3036 W: PCP: MANGAN
OLIN: ADD: 3422 BEECHWOOD C: GUAR: JNS: M,PHPM
CITY/ST/ZIP: WILLIAMSTON,MI 48895 UPDS: R-05/31

TES Encounter/Transaction Editing

Patient/Encounter Selection
Patient: Encounter: Alt Ent: Transaction:
Patient/Encounter Filters
Workfile: CNS-CP-SEND BACK
Batch:

Patient Name	Encounter	Alternate	Status	ServDate	Txns	Total
SCHEDULING,PATIENT A	1028		Edits	06/02/2011	0	0.00

ⓘ Move Encounter ⓘ Invoice Inquiry ⓘ View Reg ⓘ Workfiles
Ⓐ Edit Reg ⓘ Move Encounter ⓘ Change Ent Status ⓘ Delete Encounter
Ⓑ More Actions... ⓘ Patient Inquiry ⓘ Ent Totals ⓘ Audit Trail
Ⓒ Edit Trans ⓘ Display Edits ⓘ View Header ⓘ Display Trans
Ⓔ Edit Header

Actions ▼ OK Cancel

A zero means no procedure code exists

SCHEDULING,PATIENT A : MRN: 134137 DOB: 12/08/1936 (F-74 yrs) TEL: H: (517)655-3036 W: PCP: MANGAN
OLIN: ADD: 3422 BEECHWOOD C: GUAR: JNS: M,PHPM
CITY/ST/ZIP: WILLIAMSTON,MI 48895 UPDS: R-05/31

TES Encounter/Transaction Editing

Patient/Encounter Selection
Patient: Encounter: Alt Ent: Transaction:
Patient/Encounter Filters
Workfile: CNS-CP-SEND BACK
Batch:

Patient Name	Encounter	Alternate	Status	ServDate	Txns	Total
SCHEDULING,PATIENT B	1030		Open	06/03/2011	1	108.00

ⓘ Move Encounter ⓘ Invoice Inquiry ⓘ View Reg ⓘ Workfiles
Ⓐ Edit Reg ⓘ Move Encounter ⓘ Change Ent Status ⓘ Delete Encounter
Ⓑ More Actions... ⓘ Patient Inquiry ⓘ Ent Totals ⓘ Audit Trail
Ⓒ Edit Trans ⓘ Display Edits ⓘ View Header ⓘ Display Trans
Ⓔ Edit Header

Actions ▼ OK Cancel

Procedure code exists

Click on action code “E” (Edit Header) and click the page arrow left twice to view the Encounter Header Comments.

SCHEDULING,PATIENT A : **DOB:** 12/08/1936 (F-74 yrs) **TEL:** H: (517)655-3036 W: **PCP:** MANGAN DO,WILLIA
MRN: 134137 **ADD:** 3422 BEECHWOOD **C:** **IHS:** M,PHPM
OLIN: **CITY/ST/ZIP:** WILLIAMSTON,MI 48895 **GUAR:** **UPDS:** R-05/31/2011, I-03,

TES Encounter/Transaction Editing - Encounter Details

Patient: SCHEDULING,PATIENT A **MRN:** 134137 **Encounter:** 1028
Created: 06/02/2011 1:59P **User:** MSUTRV **Status:** Edits **Alt Ent:**

Sch Appt: [] **Ser Date:** 06/02/11 **Reg Flow:** 81,54,1 **FSC:** 81
Provider: ACKERMAN MI **BillArea:** NEUROLOC **Div:** CLINICAL I
Adm Date: 06/02/2011 **Dis Date:** []
Inj Date: [] **Pri Auth:** [] **RefPhy:** []
Referral: [] **LastEval:** [] **Location:** CC **Comts?:** Y
Group: 3

Diag 1 : 485 **O:** [v] **Desc:** BRONCHOPNEUMONIA ORGANISM UI
2 : [] **O:** [v] **Desc:**
3 : [] **O:** [v] **Desc:**
4 : [] **O:** [v] **Desc:**
5 : [] **O:** [v] **Desc:**
6 : [] **O:** [v] **Desc:**

◀ Page ▶ Actions... OK Cancel



On the Encounter Level Comments screen, the comment will describe the information that is needed by the billing unit in order to process the charge (claim).

SCHEDULING, PATIENT A

MRN: 134137 DOB: 12/08/1936 (F-74 yrs) TEL: H: (517)655-3036 W: PCP: ;
OLIN: ADD: 3422 BEECHWOOD C: INS: ;
CITY/ST/ZIP: WILLIAMSTON, MI 48895 GUAR: UPDS:

TES Encounter/Transaction Editing - Comments

Encounter Header Comments

MISSING PROCEDURE CODE06/02/2011 02:10PMAF

Page Actions... OK Cancel

After retrieving the requested information, click in the comments area and press enter until you are below the comment. Enter the missing information and date stamp it by holding down the “Ctrl” key and pressing “T”. Enter your initials after the date and time.

TES Encounter/Transaction Editing - Comments

Encounter Header Comments

MISSING PROCEDURE CODE06/02/2011 02:10PMAF

Procedure code is 99214 06/03/2011 09:33AM MAF

Page back to the “TES Encounter/Transaction Editing – Main” screen

TES Encounter/Transaction Editing - Main

Patient: SCHEDULING,PATIENT A Is this the pt: MRN: 134137
 Encounter: 1028 Sch Appt: OLIN#:
 Created: 06/02/2011 1:59P User: MSUTRV Status: Edits

Provider: ACKERMAN MI Case: Reg Flow: 81,54,1
 BillArea: NEUROLOC Last DX: FSC: 81
 Location: CC Diagnosis
 Ser Date: 06/02/11 1 485 O: BRONCHOPNEUMONIA ORGANISM UI
 Referring Prov: 2 O:
 Authorization #: 3 O:

Group: 3

Send Back to Dept(Y/N): Comts?: Y
 Date Chg Received in billing: 06/02/2011

Proc	O: Mod	Ser Date	Thru Dt	Un	Unit Amt	Total Amt	FSC FI	DX
1								
2								
3								
Total: 0.00								

Page Actions... OK Cancel

Click in the “Send Back to Dept (Y/N):” box twice to remove the check mark. Enter “Y” in the “Is this the pt” box. Click OK two times. Your response has now been sent back to the billing unit. Move on to the next patient.

SCHEDULING,PATIENT A MRN: 134137 DOB: 12/08/1936 (F-74 yrs) TEL: H: (517)655-3036 W: PCP: M
 Select Patient▼ OLIN: ADD: 3422 BEECHWOOD C: INS: M
 CITY/ST/ZIP: WILLIAMSTON,MI 48895 GUAR: UPDS: R

TES Encounter/Transaction Editing - Main

Patient: SCHEDULING,PATIENT A Is this the pt: MRN: 134137
 Encounter: 1028 Sch Appt: OLIN#:
 Created: 06/02/2011 1:59P User: MSUTRV Status: Edits

Provider: ACKERMAN MI Case: Reg Flow: 81,54,1
 BillArea: NEUROLOC Last DX: FSC: 81
 Location: CC Diagnosis
 Ser Date: 06/02/11 1 485 O: BRONCHOPNEUMONIA ORGANISM UI
 Referring Prov: 2 O:
 Authorization #: 3 O:

Group: 3

Send Back to Dept(Y/N): Comts?: Y
 Date Chg Received in billing: 06/02/2011

Proc	O: Mod	Ser Date	Thru Dt	Un	Unit Amt	Total Amt	FSC FI	DX
1								
2								
3								
Total: 0.00								

