



# Patient Estimates (PE) for eCareNEXT®

## Self-Pay Pricing on an Insured Estimate – Set up and Usage

## **Background:**

There are often scenarios in which a single line item, or multiple line items may need to remain as selfpay while the remaining items of an estimate are priced according to the appropriate insurance contract. Scenarios may include cosmetic procedures that are done at the same time as a procedure that can be billed to an insurance company; or other non-covered line items that the patient understands will be paid at self-pay rates.

Clients can now be set-up to allow for this type of functionality. If this functionality would be of value to the client they will need to reach out to Support, Account Management or their Implementation Consultant to enable this feature. This feature cannot be turned on per user so once it is enabled all users at a facility will have access to this function.

#### Usage:

The Self-Pay pricing on an Insured Estimates setting has only been developed for the eCareNext version of Patient Estimates. Once enabled, the setting will work on all insured estimates for all users. This functionality currently works when using **Claims Search**, **Chargemaster Search**, **Template Search**, **Specific Chargemaster Search** or if the navigation menu is used to select a specific template item.





## Claims Search:

When utilizing claims search any of the standard search criteria for either an outpatient, inpatient or professional search can be utilized. If needed any of the additional restrictions can still be used as well. The actual search functionality has not been affected by this change. All screens to select a Claims Search procedure remain the same. Once an individual grouping is selected the user will see a new **Self-Pay** column.

By default, all line items are displayed as unchecked. A user can select all line items by checking the very top box of the column or individual line items throughout the listing.

	Description	OPT/HCPC	Modifiers	Rev Code	Units	Charge	× All
8	LEVEL IV - SURGICAL PATHOLOGY GROSS AND MICROSCIPIC SONOARMANTIN REGISTRON BIOPSY BONE MARROW BIOPSY BONE EXOSTOSS BRAINMEENINGS, OTHER THAN FOR TUMOR RESECTION BRAGT BIOPSY. NOT REJURING MICROSCOPIC EVALUATION OF	88305		310	3	607.53	Σ.
2	INJECTION MIDAZOLAM HYDROCHLORIDE, PER 1 MG	J2250		636	5	104.60	Z
	INJECTION, FENTANYL CITRATE, 0.1	J3010		636	3	114.96	Z
8	COLONOSCOPY, FLEXIBLE WITH DIRECTED SUBMUCOSAL INJECTION (S), ANY SUBSTANCE	45381		750	1	2548.14	×
8	COLONOSCOPY, FLEXIBLE, WITH REMOVAL OF TUMORISI, POLYPISI, OR OTHER LESION(S) BY SNARE TECHNIQUE	45385		750	1	2564 29	~
Self-Pay	Description	CPT/HCPC	Modifiers	Rev Code	Units	Charge	Use ✓ All
8	LEVEL IV - SUBERCAL PATHOLOGY GROSS AND MICROSCOPIC SPORT NAROUSI MISSED ATTERY BOOPSY BOIN MARROW, BIOPSY BOINE EXOSTOSS BRAINMENINGS, OTHER THAN FOR TUMOR RESECTION BRAST BOPSY, NOT REQUERING MICROSCOPIC EVALUATION OF MICROSCOPIC EVALUATION OF	88305		310	1	607.53	8
2	INJECTION, MIDAZOLAM HYDROCHLORIDE, PER 1 MG	J2250		636	5	104.60	Z
	INJECTION, FENTANYL CITRATE, 0.1	J3010		636	3	114,96	×
	COLONOSCOPY, FLEXIBLE: WITH DIRECTED SUBMUCOSAL INJECTION (S), ANY SUBSTANCE	45381		750	1	2548.14	Z
	COLONOSCOPY, FLEXIBLE, WITH REMOVAL OF TUMOR(S), POLYP(S), OR OTHER LESION/C), BY ON ARE	45385		750	9	2564.29	×

I SEARCH	A A	î	Claim S Showing 5 Diagnosis:	earch Results entries (21211)*					Total Charg \$5939	NR: 52	^		Selected Procedu
ж	A A .		All of these Review and	Charge Line items came back associated uncheck the Charge Line item if it is not a	with your search pplicable to the	th. patient.			Select E	lack	.1		
VISIT	A A		Self-Pay	Description	CPT/HCPC	Modifiers	Rev Code	Units	Charge	Use XII			
м				LEVEL IV - SURGICAL PATHOLOGY GROSS AND MICROSCOPY SPONDAUMATION BUOTTEN- SPONDAUMATION BUOTTEN- BIOPSY BONE MARROW BIOPSY BONE EXOSTOSIS BRAINMENDENGES, OTHER THAN FOR TUMOR RESECTION BRAAST BIOPSY. NOT REQUERING MICROSCOPIC EVALUATION OF MICROSCOPIC EVALUATION OF	88305		310	3	607.53	¥		l	
GYA-F GYH-	P.			INJECTION, MIDAZOLAM HYDROCHLORIDE, PER 1 MG	J2250		636	5	104.60	V			
GYS-Z	h h			INJECTION, FENTANYL CITRATE, 0.1 MG	J3010		636	3	114.96	V			
4-G 4-N D-Z	A A A			COLONOSCOPY, FLEXIBLE: WITH DIRECTED SUBMUCOSAL INJECTION (S), ANY SUBSTANCE	45381		750	1	2548.14	V			
E	A A A	~		COLONOSCOPY, FLEXIBLE, WITH REMOVAL OF TUMOR(S), POLYP(S), OR OTHER LESION(S) BY SNARE TECHNIQUE	45385		750	1	2564.29	V			

When selecting line items from the grouping it is also important to review the checked items in the far-right column as well. The far-right column indicates the procedures that will be included in the estimate. The farleft column (Self-Pay column) will indicate which procedures will be priced using self-pay logic. It is possible to bring across some lines as self-pay and other lines to price against the insurance contract from the same grouping.

Once the user has selected either individual line items or selected all line items in a grouping they can click on **Select** to add the items to the **Selected Procedures** column.

## User selects "some" line items from Claims Search:

The coloring of the Selected Procedures box has been modified to help users see a visual representation of the way they have selected line items. When only "some" items are selected the grouping will display with a light purple background and the descriptions will be in all black.

When this is expanded the list will still display a light purple background. Each individual line item will be colored according to the way it has been selected. Line items marked as self-pay will show in bold purple text and line items not marked for self-pay will display in bold black text (see screenshot on next page).





COLONOSCOPY, WITH DIRECTED SAL INJECTION(S),

HINJECTION, FENTANYL CITRATE, 0.1 MG

EVEL IV - SURGICAL PATHOLOGY, GROSS AND MICROSCOPIC EXAMINATION ABORTION

EXAMINATION ABORTION SPONTANEOUS/MISSED ARTERY, BIOPSY BONE EXOSTOSIS BRAIN/MENINGES, OTHER THAN FOR TUMOR RESECTION BREAST, BIOPSY, NOT REQUIRING MICROSCOPIC EVALUATION OF SURGICA

COLONOSCOPY FLEXIBLE; WITH REMOVAL

TECHNIQUE

DF TUMOR(S), POLYP(S), OR DTHER LESION(S) BY SNARE



## User selects "all" lines items from Claims Search:

When all line items from a Claims Search have been selected to run as self-pay an additional piece of information is added to the claims grouping in both the collapsed and expanded view; a purple phrase stating "SelfPay Grouping" is added above the primary grouped description.



When the grouping is expanded the user will note that every single line item within the selection group is now in purple. The phrase "selfPay Grouping" remains in place above the description.

#### **Estimate Screen (Claims Search):**

Once all line items and groupings have been added the user will click **I'm Done** to process the estimate as usual. The estimate will complete the process and the display will break the self-pay procedures separate from those covered by insurance.

Services Covered by your Insurance will display first with all applicable contract valuations included. All the applicable benefits for those line items will display within this grouping.

Self-Pay Services will display below any line items that are expected to be covered by the insurance. If there are any applicable self-pay discounts set up for the client they will also display in this section.

The total Estimate Results is a summation of the patient responsibility from the insured combined with section the patient responsibility from the Self-Pay section.







## Chargemaster Search:

When using the chargemaster search either a code or description can be entered as the search criteria. In the example below the word 'chest' was used to produce the results. When this setting is enabled users will see a new column with a check box that allows them to select the line item they wish to run as self-pay.

CHARGEMASTER SEARCH	Search	n Results for	Chest		
CLAIMS SEARCH				~	Selected Procedures
TEMPLATE SEARCH	, if this	s procedure	will not be covered by insurance, check Sen-Pay.		
ASY SEARCH		Self-Pay	Procedure		
BARIATRIC					
PS_COSMETICS					
ARDIOLOGY	·		CHEST TUBE STR 32FR		
T D			CHEST DRAIN EXPRESS UNIT		
IABETIC CENTER			CHEST TUBE STR 32ER		
AB GENERAL TESTING					
AB HEALTHY WOMEN			CHEST DRAIN EXPRESS UNIT		
AB PRE-OP TESTING			H CHEST TUBE SIL ST 24FR		
AB STD TESTING			CHEST TUBE STR 32ER		
ABS					
AAMMOGRAPHY			CHEST DRAIN EXPRESS UNIT		
ira p			HCHEST TUBE SIL ST 24FR		
NUCLEAR MEDICINE			CHEST TUBE SIL ST 28FR		
DB Epidural 📃 🕨					
LASTICS			CHEST TOBE STR 32FR		
IADIOLOGY			CHEST DRAIN EXPRESS UNIT		
LEEP LAB			H CHEST TUBE SIL ST 24FR		
JLTRASOUND			(H) CHEST THEE SH ST 20EP		
	- L	<u> </u>		~	

The user will click on the check box, and then on the procedure line to add it to the Selected Procedures column.

Select Proce	edu	re(s)			×
CHARGEMASTER SEARCH		Search Results for ch	nest		
CLAIMS SEARCH			071111-RIBS BILAT W CHEST MIN 4V		Selected Procedures
TEMPLATE SEARCH	- Þ-			<b>^</b>	
EASY SEARCH	- 10	✓	1250-CT CHEST W/O CONTRAST		
GENERIC PROCEDURES	- Þ-		H71260 CT CHEST PHI MONARY EMROL		
BARIATRIC	- 10				
BPS_COSMETICS	- 10		H 71260-CT CHEST W/CONTRAST		
CARDIOLOGY	- Þ-	_			
СТ	- 10-		V712/0-CT CHEST W/WO CONTRAST		
DEXA SCAN			1275-CT CHEST ANGIO W/WO CON		

The Selected Procedures column will display all line items that have been selected as Self-Pay in their own section and in a different color than those items that will be processed with insurance.

Select Proc	edu	re(s)	×
CHARGEMASTER SEARCH	•	Start Page	
CLAIMS SEARCH	⊳	Please select a search or a category on the left to start	I'm Done
TEMPLATE SEARCH	- 10		
EASY SEARCH	- 10-		
GENERIC PROCEDURES	- 10-		Selected Procedures
BARIATRIC	- 10-		
BPS_COSMETICS	- 10		Selfpay Procedures
CARDIOLOGY	- 10-		(Q
ст	- 10-		1250-CT CHEST W/O
DEXA SCAN	_ ⊳		CONTRAST
DIABETIC CENTER	- 10		L
LAB GENERAL TESTING	10		





When both self-pay line items and items that are to be processed by the insurance are used the display will be similar to what is seen below. Items in purple will be processed as self-pay and items in light blue will process to the insurance loaded on the estimate.

Select Proce	du	re(s)	×
CHARGEMASTER SEARCH	►	Start Page	
CLAIMS SEARCH	⊳	Please select a search or a category on the left to start	I'm Done
TEMPLATE SEARCH	$\geqslant$		
EASY SEARCH	$\geqslant$		
GENERIC PROCEDURES	$\left\ \cdot\right\ $		Selected Procedures
BARIATRIC	$\geqslant$		_
BPS_COSMETICS	$\geqslant$		Selfpay Procedures
CARDIOLOGY	$\geqslant$		<b>O</b>
ст	$\gg$		071250-CT CHEST W/0
EXA SCAN	$\geqslant$		CONTRAST
ABETIC CENTER	$\geqslant$		
B GENERAL TESTING	$\left\ \cdot\right\ $		173722-MRI ANKLE LT W
B HEALTHY WOMEN IECK/PREGNANCY TESTING	⊳		CONT
B PRE-OP TESTING	$\geqslant$		X
AB STD TESTING	$\geqslant$		H 74019-ABDOMEN MULTIPLE
ABS	$\geqslant$		VIEW NO CHEST
AMMOGRAPHY	$\gg$		
(RA	$\geqslant$		Selfpay Procedures
(RI	ert		
NUCLEAR MEDICINE	ert		VIGUO-CEAVICLE LEFT
OB Epidural			L

#### Template Search:

When using Template Search the user will be presented with a display very similar to what is seen when using the Chargemaster Search. The only difference will be that in this instance only existing templates are being included in the search. The user will use the same process to select and identify line items that should be priced as self-pay. Items will display in the Selected Procedures column exactly as they did with the Chargemaster Search. In this example, we searched for '73000'.

Select Proce	edu	re(	s)			×
CHARGEMASTER SEARCH	•	Sea	arch Results for	73000		
CLAIMS SEARCH	- IN-					Selected Procedures
TEMPLATE SEARCH		lf	this procedure v	vill not be covered by Insurance, check Self-Pay.	^	
EASY SEARCH	- ▶		Colf Dou	Draeadura		·
GENERIC PROCEDURES	- Þ-		Sell-Fay	Flocedule		
BARIATRIC	- IN-			1000-CLAVICLE RIGHT		
BPS_COSMETICS	- ▶					
CARDIOLOGY	- Þ-			73000-CLAVICLE RIGHT		
СТ	- IN-					
DEXA SCAN	- IP-					
DIABETIC CENTER				H73000-CLAVICLE RIGHT		
LAB GENERAL TESTING	- IN-		_			
LAB HEALTHY WOMEN				V 73000-CLAVICLE LEFT		
LAB PRE-OP TESTING				H73000-CLAVICLE COMPLETE BILATERAL		
LAB STD TESTING						

#### Templates:

When using templates, when this feature is enabled the Self-Pay selection criteria will also be displayed and work in the same fashion as described above. It is important to remember that if the templates have multiple line items they will all be brought across as Self-Pay if that template is selected.

Select Proce	edu	re(s	)			×	
CHARGEMASTER SEARCH	•	CARD	IOLOG	1			Th Done
CLAIMS SEARCH	- 10					Selected Procedures	
TEMPLATE SEARCH	- ▶	lf thi	is proce	dure will not be covered by Insurance, check Self-Pay.	- 12		
EASY SEARCH	- ▶		Solf. Do	Procedure			Selected Procedures
GENERIC PROCEDURES	- Þ-	-	Sell-I a	Tioceare			
BARIATRIC	- Þ-			(H) 93701-BIOIMPEDANCE			
BPS_COSMETICS	_ ▶		_				Selfpay Procedures
CARDIOLOGY	-			193306-ECHO COMPLETE W/CF & DOP			
ст	- 10			H 93308-ECHOCARDIOCRAM I TO STUDY			93226-UP TO 48HR HOLTER
DEXA SCAN	- Þ-						ΔΝΔΙΥS
DIABETIC CENTER	- Þ-			93005-EKG 12 LEAD			ANALIS
LAB GENERAL TESTING	- Þ-		_	· · · · · · · · · · · · · · · · · · ·			<b>P</b>
LAB HEALTHY WOMEN				V93017-STRESS TEST			93225-UP TO 48HR HOLTER
LAB PRE-OP TESTING				93660-TILT TABLE EVALUATION			RECORD
LAB STD TESTING	1		-				
LABS		L .		1 W48 HOUR HOLTER			





## Estimate Screen (CDM, Template Search and Template Menu):

Once all procedures are selected the user should select "I'm Done" to process the estimate. The estimate screen will now display two new sections.

#### Services Covered by your Insurance

The first section will be all charges that will be processed by the insurance company. If there are any applicable discounts being offered to insured patients, they will be listed here as well. Due to the nature of the applicable discounts and difference in messages between insured and self-pay estimates two PDFs will normally be printed for patients that are having split services.







## **Self-Pay Services**

The second section that will display are for those services that are not covered by insurance. Any applicable discounts for your self-pay services will display and be applied. You may print the self-pay estimate by clicking on the Print Estimate button.

Self-Pay Serv	/Ices								
Charge Code	Service	Definition	Cha	rge Description		Svc Charge	Adj Charge	Quantity	Total
93226 731	Hospita	al Outpatient	H UP TO 48HR HOLTER ANALYS			\$1,132.07	\$1,132.07	1	\$1,132.07
93225 731	Hospita	al Outpatient	H UP TO 48HR HOLTER RECORD			\$1,012.71	\$1,012.71	1	\$1,012.71
72191 352	Hospita	al Outpatient	Θ	CT ANGIO PELVIS	S W CONT	\$4,254.72	\$4,254.72	1	\$4,254.72
							Tot	al Charges	\$6,399.50 <mark>  </mark>
0.15.0									
Self-Pay Disc	counts								
Patient Respon	sibility	Discount		Savings	Amount Due				
\$63	399.50	Self-Pay	40%	\$2,559.80	\$3,839.70				
\$3	839.70	Prompt-Pay	10%	\$383.97	\$3,455.73				
\$63	399.50	Cosmetics	0%	\$0.00	\$6,399.50				
			-						English 🔽 🛛 Pri

All remaining portions of the Estimate Screen will remain the same.