



08.28.2024 • RELEASE REPORT

PIMSY Plan	PIMSY Department	PIMSY Screen	PIMSY Platform	Type	Release Notes
Prime Professional Platinum	Billing / Invoicing	Eligibility	Provider Portal	New	<p><i>Real Time Eligibility for ClaimMD Users</i></p> <p>We are excited to announce that Real Time Eligibility is exclusively available to ClaimMD users. The Real Time Eligibility feature will allow you to obtain immediate results for a client's active coverage and patient responsibility due on primary, secondary or tertiary plans. For any questions or further details, please email support@pimsyehr.com for assistance.</p>
Prime Professional Platinum	Medical Records	Client Groups	Provider Portal	Enhancement	<p><i>Client Group Management - Provider Portal</i></p> <p>We are excited to announce the addition of Client Group Management to the Provider Portal. This new feature empowers users to create and manage client groups directly from the Client List screen.</p> <p><i>Create and Manage Groups:</i> Users can now effortlessly create and manage client groups, streamlining the organization of clients.</p> <p><i>Group Overview:</i> The Client List screen has been enhanced to display group members directly from the grid, allowing users to view group details without needing to open each group individually.</p>

Prime Professional Platinum	Medical Records	My Clients	Provider Portal	New	<p><i>My Clients filter option in the Client List</i></p> <p>We are pleased to introduce a new filter option in the Client List called “My Clients”. This feature allows users to quickly view and access clients that are specifically assigned to them.</p> <p><i>My Clients filter:</i> Users can now easily filter the Client List to show only the clients assigned to them.</p> <p><i>Assignment Criteria:</i> Clients will appear under "My Clients" if you are assigned to one of the clinical fields or designated as an additional user in the client's user assignment.</p> <p>This enhancement simplifies the process of managing your assigned clients, ensuring quick and focused access within the Provider Portal.</p>
Prime Professional Platinum	Medical Records	Client Details	Provider Portal	Enhancement	<p><i>Gender Field added to Client Details</i></p> <p>We have enhanced the Client Details screen on the Provider Portal by adding a field for gender. This update is designed to streamline client data management.</p> <p><i>Gender Field Addition:</i> The Client Detail screen now includes a Gender field, allowing users to enter or update this information directly from the screen.</p> <p><i>System Requirements:</i> If the Gender field is a required field within your system setup, you will be prompted to add or select a gender when saving a client's details.</p> <p><i>Streamlined Workflow:</i> This addition eliminates the need to navigate to the Demographic screen, simplifying the setup and management of client information.</p> <p>This enhancement is aimed at improving the efficiency and ease of use within the Provider Portal, ensuring that all necessary client data is captured promptly.</p>

Prime Professional Platinum	Medical Records	Medical /Medications	Provider Portal	Enhancement	<p>We have made improvements to the Client Medications area in the Provider Portal to enhance usability and clarity.</p> <p><i>Simplified Slide-Out:</i> Unnecessary fields have been removed from the medication slide-out, creating a cleaner and more focused interface.</p> <p><i>Reorganized Medication Grid:</i> The Medication grid has been reorganized to provide a more intuitive layout, improving the overall clarity and ease of use.</p> <p>These changes are designed to streamline the medication management process, making it easier for users to view and update client medications efficiently.</p>
Prime Professional Platinum	Medical Records	Diagnosis	Provider Portal	Enhancement	<p><i>Client Diagnosis Enhancements</i></p> <p>We have introduced several enhancements to the Client Diagnosis feature in the Provider Portal, aimed at improving usability and clarity.</p> <p><i>Reordered Slide-Out Fields:</i> Some fields on the diagnosis slide-out have been reordered to provide a more logical flow and easier navigation.</p> <p><i>Accordion Sections:</i> Less frequently used fields have been moved under the Diagnosis Detail section, resulting in a cleaner and more organized interface.</p> <p><i>Reorganized Diagnosis Grid:</i> The diagnosis grid has been reordered to enhance the overall layout and make it easier for users to find relevant information.</p>

Prime Professional Platinum	ALL	ALL	Provider Portal	Enhancement	<p><i>Provider Portal UI Improvements</i></p> <p>We have implemented several UI improvements across the Provider Portal, focusing on updating button designs and grids to achieve a consistent look and feel.</p> <p><i>Button Updates:</i> All buttons across the Provider Portal have been updated to a unified design, enhancing visual consistency and improving the overall user experience.</p> <p><i>Grid Enhancements:</i> Grids throughout the portal have been refined to match the updated design, ensuring a more cohesive and visually appealing interface.</p>
Prime Professional Platinum	Medical Records	Disclosure	Provider Portal	Enhancement	<p><i>Disclosures</i></p> <p>We are pleased to announce the addition of the Client Disclosure feature to the Provider Portal.</p> <p><i>Client Disclosure:</i> Users can now track when client information is disclosed, providing greater transparency and accountability in managing client data.</p> <p>The following profile rules apply to client disclosures are: <i>Client disclosure Create</i> <i>Client disclosure Modify</i> <i>Client disclosure Delete</i></p> <p><i>Client disclosure View:</i> This feature enhances the ability to monitor and manage client information disclosures, supporting better compliance and record-keeping within the Provider Portal.</p>

Prime Professional Platinum	Medical Records	Status Log	Provider Portal	Enhancement	<p><i>Status Log</i></p> <p>We are excited to introduce the Client Status Log feature to the Provider Portal.</p> <p><i>Client Status Tracking:</i> Users can now view detailed logs of client activation and deactivation events.</p> <p><i>Client Division Assignment:</i> The status log also includes information on client division assignments, providing a comprehensive view of client status changes.</p> <p>The following profile rules apply to client status log are:</p> <p><i>Client Status Log View</i> <i>Client Status Log Create</i> <i>Client Status Log Modify</i> <i>Client Status Log Delete</i></p> <p>This new feature enhances the ability to track and manage client status and assignments, offering greater visibility and control within the Provider Portal.</p>
Prime Professional Platinum	Medical Records	Client Notes	Provider Portal	New	<p><i>Note Report Queuing</i></p> <p>We are pleased to announce the introduction of advanced note report functionalities in the Provider Portal.</p> <p><i>Note Report Queuing:</i> Users can now queue multiple note reports for batch processing and download. This feature leverages the filtering of the note grid on the client's chart, allowing for the generation and retrieval of several reports at once and streamlining report management.</p> <p><i>Download Alerts:</i> Notifications will be sent to users when the queued note reports are ready for download, ensuring timely access to the reports. These enhancements are designed to improve the efficiency and convenience of managing note reports within the Provider Portal.</p>
Prime Professional Platinum	Medical Records	Client Administration	Provider Portal	Enhancement	<p><i>Additional User Assignment</i></p> <p>We are excited to announce the addition of the Additional User Assignment feature in the Provider Portal.</p> <p><i>Additional User Assignment:</i> A new section has been added to the Client Administration screen, allowing for the assignment of multiple additional users to a client.</p>

Prime Professional Platinum	Billing / Invoicing	Client Insurance	Provider Portal	Enhancement	<p><i>Insurance Notes Field Templates</i></p> <p>We are pleased to announce the addition of templates to the Insurance notes field in the Provider Portal.</p> <p><i>Template Integration:</i> Users with the appropriate profile rules for template usage can now add and modify templates within the Insurance notes field.</p> <p><i>Enhanced Free Text Area:</i> Templates can be utilized in the free text area, providing a standardized and efficient way to manage and enter insurance notes.</p> <p>This update enhances the functionality of the Insurance notes field, allowing for more efficient and consistent notetaking.</p>
Prime Professional Platinum	Client Portal	Payment History	Client Portal	New	<p><i>New Statement Report</i></p> <p>We have added a new "Statement" report to the Payment History screen on the Client Portal. This enhancement allows clients access to open the Statement report directly within the Client Portal, providing quick and easy access to their statements.</p>

See next page for more details



Real Time Eligibility (ClaimMD)

- We are excited to announce that Real Time Eligibility is exclusively available to ClaimMD users. The Real Time Eligibility feature will allow you to obtain immediate results for clients active coverage and patient responsibility due on primary, secondary or tertiary plans. For any questions or further details, please email support@pimsyehr.com for assistance.

The screenshot displays the 'PRIMARY Insurance Eligibility' window. On the left, a list of patient and insurance details is shown. On the right, there are expandable sections for 'HEALTH BENEFIT PLAN COVERAGE', 'HOSPITAL', and 'MENTAL HEALTH'. The 'MENTAL HEALTH' section is expanded, showing specific benefit codes and descriptions. Below the main window, a 'Client Misc' card for Grace Andrews is visible, with an 'Eligibility' button highlighted by a yellow box. A yellow arrow points from this button to the 'PRIMARY Insurance Eligibility' window.

PRIMARY Insurance Eligibility	
Insurance Plan: PREFERRED PROVIDER OPTION PLUS MEDICAL	
Insurance: Primary	
elig result date:	05/22/2024
elig result time:	164004
eligid:	97461723
group name:	Insurance Group Name
group number:	1234567
ins name f:	JOHN
ins name l:	DOE
ins name m:	K
ins number:	XYZ123456789
pat addr 1:	123 Main St
pat city:	SOMEWHERE
pat dob:	1/1/2000
pat name f:	JANE
pat name l:	DOE
pat sex:	F
pat state:	NC
pat zip:	12345
plan date:	01/01/2017 - 12/31/9999

HEALTH BENEFIT PLAN COVERAGE	
HOSPITAL	
MENTAL HEALTH	

benefit code:	MH
benefit coverage code:	1
benefit coverage description:	Active Coverage
benefit description:	Mental Health
inplan network:	W

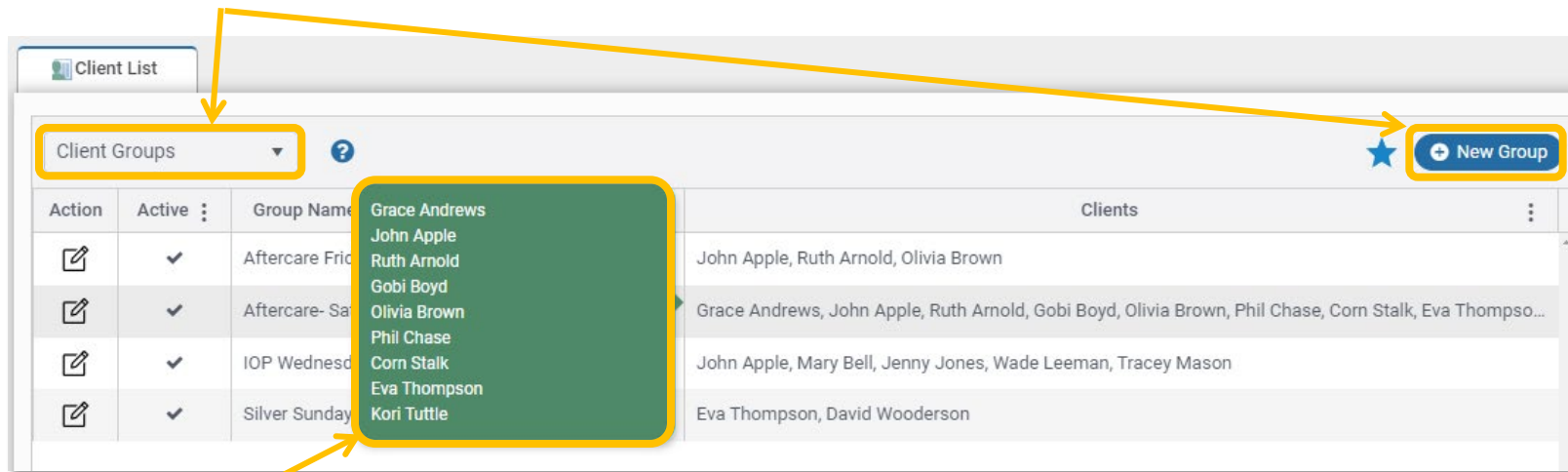
Client Misc
Grace Andrews
A-C-9527
113 Past | 1 Upcoming

Active 12/31/2000
Female ACA 23 yrs
(828) 123-4567
45678 Morton Ave, Asheville, NC, 52143
Haywood Division

Send Message Report **Eligibility**

Client Group Management

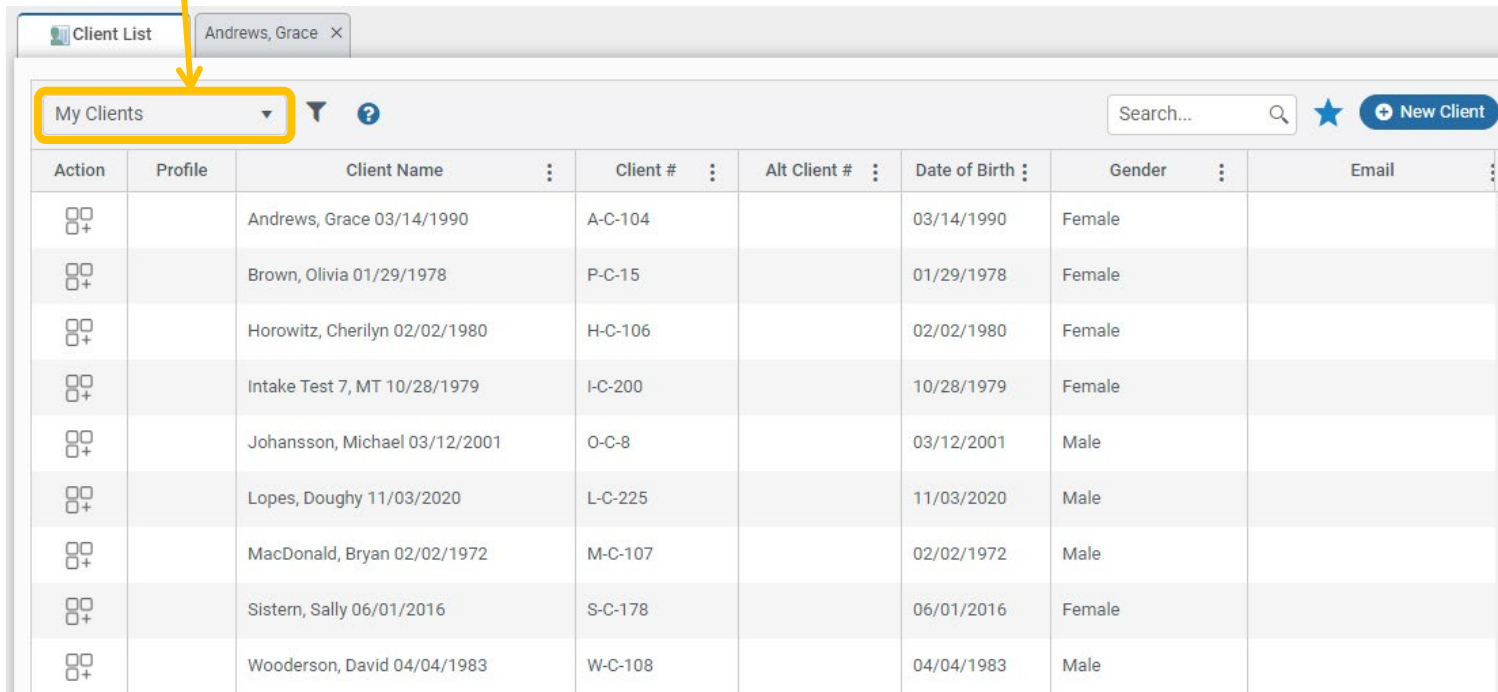
- We are excited to announce the addition of Client Group Management to the Provider Portal. This new feature empowers users to create and manage client groups directly from the Client List screen.
- **Create and Manage Groups:** Users can now effortlessly create and manage client groups, streamlining the organization of clients.



- **Group Overview:** The Client List screen has been enhanced to display group members directly from the grid, allowing users to view group details without needing to open each group individually.

My Clients List

- We are pleased to introduce a new filter option in the Client List called "My Clients". This feature allows users to quickly view and access clients that are specifically assigned to them.
- **My Clients filter:** Users can now easily filter the Client List to show only the clients assigned to them.



The screenshot shows a web application interface for a 'Client List'. At the top, there is a tab labeled 'Client List' and a user profile 'Andrews, Grace'. Below this is a filter dropdown menu currently set to 'My Clients', which is highlighted with a yellow box and an arrow. To the right of the filter are icons for a funnel, a question mark, a search bar with the text 'Search...', a star icon, and a 'New Client' button. The main content is a table with columns: Action, Profile, Client Name, Client #, Alt Client #, Date of Birth, Gender, and Email. The table contains eight rows of client data.

Action	Profile	Client Name	Client #	Alt Client #	Date of Birth	Gender	Email
		Andrews, Grace 03/14/1990	A-C-104		03/14/1990	Female	
		Brown, Olivia 01/29/1978	P-C-15		01/29/1978	Female	
		Horowitz, Cheryl 02/02/1980	H-C-106		02/02/1980	Female	
		Intake Test 7, MT 10/28/1979	I-C-200		10/28/1979	Female	
		Johansson, Michael 03/12/2001	O-C-8		03/12/2001	Male	
		Lopes, Doughy 11/03/2020	L-C-225		11/03/2020	Male	
		MacDonald, Bryan 02/02/1972	M-C-107		02/02/1972	Male	
		Sistern, Sally 06/01/2016	S-C-178		06/01/2016	Female	
		Wooderson, David 04/04/1983	W-C-108		04/04/1983	Male	

- **Assignment Criteria:** Clients will appear under "My Clients" if you are assigned to one of the clinical fields or designated as an additional user in the client's user assignment.
- This enhancement simplifies the process of managing your assigned clients, ensuring quick and focused access within the Provider Portal.

Client Medications Area Improvements

- We have made improvements to the Client Medications area in the Provider Portal to enhance usability and clarity:
- **Simplified Slide-Out:** Unnecessary fields have been removed from the medication slide-out, creating a cleaner and more focused interface.
- **Reorganized Medication Grid:** The Medication grid has been reorganized to provide a more intuitive layout, improving the overall clarity and ease of use.
- These changes are designed to streamline the medication management process, making it easier for users to view and update client medications efficiently.

The image displays two overlapping screenshots of a software interface for managing client medications. The top screenshot shows a 'Medications' slide-out form with the following fields:

- Medication Name
- Strength
- Unit
- Dosage
- Quantity
- Refills
- Route
- Instructions
- General Notes
- Active

The bottom screenshot shows a 'Medical' grid with the following columns:

Action	Pharmacy	Medication	Strength	Unit	Dosage	Quantity	Refills	Route	Instructions
	CVS Pharmacy # 5379 - 110 NC HWY 801 NORTH, ADVANCE	Celexa	20 mg		Take 1 tablet by mouth every morning	30	0	oral	
	CVS Pharmacy # 5379 - 110 NC HWY 801	Wellbutrin SR	100 mg		Take 1 tablet by mouth every morning	60	0	oral	

The grid also includes a 'Can Self Medicate' checkbox and an 'eRXPrescribe' button. The bottom of the grid shows 'Page 1 of 1' and '1 - 2 of 2 Items'.

Client Diagnosis Area Improvements

- We have introduced several enhancements to the Client Diagnosis feature in the Provider Portal, aimed at improving usability and clarity.
- **Reordered Slide-Out Fields:** Some fields on the diagnosis slide-out have been reordered to provide a more logical flow and easier navigation.
- **Accordion Sections:** Less frequently used fields have been moved under the Diagnosis Detail section, resulting in a cleaner and more organized interface.

The image displays two screenshots of the Client Diagnosis interface, illustrating improvements in usability and clarity.

Top Screenshot (Main Diagnosis Form):

- Code Set:** Dropdown menu with value ***N/A*** and a Quick Filter input field.
- Payer Prefs:** 1. BCBS: ICD-10
- Diagnosis:** Dropdown menu with value ***N/A***
- Description:** Text input field.
- Diagnosis Date:** Date picker with value 7/1/2024 and a Primary checkbox.
- Diagnosis Details:** Link to expand the details section.

Bottom Screenshot (Expanded Diagnosis Details):

- Type:** Dropdown menu with value ***N/A*** and a Resolved Date field.
- Inactive Date:** Date picker and a Reviewed Date field.
- Status:** Dropdown menu with value Active and a Relationship dropdown menu with value Self.
- WHODAS/GAF/CGAF:** Text input field and a Diagnosed by field.
- Display Order:** Dropdown menu with value ***N/A*** and a Division dropdown menu with value ***N/A***.

A yellow arrow points from the 'Diagnosis Details' link in the top screenshot to the expanded details section in the bottom screenshot.

- **Reorganized Diagnosis Grid:** The diagnosis grid has been reordered to enhance the overall layout and make it easier for users to find relevant information.

The screenshot shows a web interface titled "Diagnosis" with a table of diagnostic entries. The table has the following columns: Action, Code, Name, Description, Diagnosis Date, WHODAS/GAF/CGAF, Diagnosis Ty..., Primary, and Status. There are three rows of data. The first row has Code F40.10, Name "social anxiety disorder (social phobia)", and Diagnosis Date 08/20/2024. The second row has Code F33.0, Name "Major Depressive Disorder, recurrent episode, Mild; With seasonal pattern", and Diagnosis Date 08/05/2024. The third row has Code F43.21, Name "Adjustment Disorders, With depressed mood, Acute*", and Diagnosis Date 07/01/2024. The Primary column has checkboxes, with the third row checked. The Status column shows "Active" for all rows. The interface includes a left sidebar with icons, a top bar with "Add New" and a help icon, and a bottom bar with pagination "Page 1 of 1" and "1 - 3 of 3 items".

Action	Code	Name	Description	Diagnosis Date	WHODAS/GAF/CGAF	Diagnosis Ty...	Primary	Status
<input type="checkbox"/>	F40.10	social anxiety disorder (social phobia)		08/20/2024			<input type="checkbox"/>	Active
<input type="checkbox"/>	F33.0	Major Depressive Disorder, recurrent episode, Mild; With seasonal pattern		08/05/2024			<input type="checkbox"/>	Active
<input type="checkbox"/>	F43.21	Adjustment Disorders, With depressed mood, Acute*		07/01/2024			<input checked="" type="checkbox"/>	Active

Disclosures

- We are pleased to announce the addition of the Client Disclosure feature to the Provider Portal.
- Client Disclosure: Users can now track when client information is disclosed, providing greater transparency and accountability in managing client data.
- The following profile rules apply to client disclosures are:
 - o Client disclosure Create
 - o Client disclosure Modify
 - o Client disclosure Delete

Client disclosure View: This feature enhances the ability to monitor and manage client information disclosures, supporting better compliance and record-keeping within the Provider Portal

The screenshot displays the 'Disclosures' section of the Provider Portal. At the top, there is a client list with tabs for 'Andrews, Grace', 'Arnold, Ruth', 'Apple, John', 'Boyd, Gobi', and 'Brown, Olivia'. Below this, the 'Disclosures' tab is active. A 'New Disclosure' button is visible on the left. The main area contains a table with the following data:

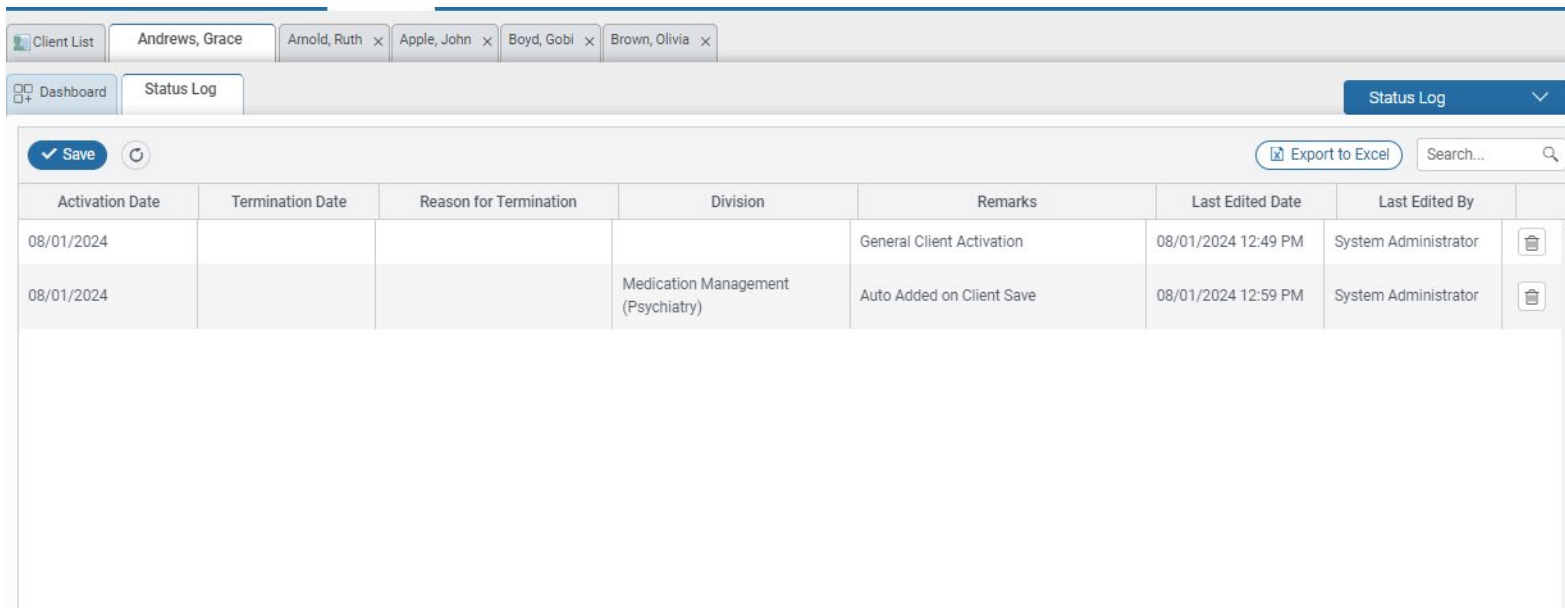
Action	Given To	Requested Date	Disclosure Date	Amount Invoiced	Amount Received	Payment Received Date	Disclosure Reason
	District Attorney, Melvin Stevens	08/01/2024	08/16/2024	125.00	125.00	08/16/2024 12:00 AM	Legal

On the right side, a dropdown menu is open, listing various options: Client Details, Demo / QnA, Contacts, Insurance, Administration, Disclosures New (highlighted), Comments, Medical, Diagnosis, Treatment Plan, Notes, Document, Statement, Client Portal, and Status Log New.

Status Log

- We are excited to introduce the Client Status Log feature to the Provider Portal.
- **Client Status Tracking:** Users can now view detailed logs of client activation and deactivation events.
- **Client Division Assignment:** The status log also includes information on client division assignments, providing a comprehensive view of client status changes.
- The following profile rules apply to client status log are:
 - o Client Status Log View
 - o Client Status Log Create
 - o Client Status Log Modify
 - o Client Status Log Delete

This new feature enhances the ability to track and manage client status and assignments, offering greater visibility and control within the Provider Portal.



The screenshot displays the 'Status Log' interface. At the top, there are tabs for 'Client List' and 'Status Log'. Below the tabs, there are buttons for 'Save', 'Export to Excel', and a search bar. The main content is a table with the following data:

Activation Date	Termination Date	Reason for Termination	Division	Remarks	Last Edited Date	Last Edited By	
08/01/2024				General Client Activation	08/01/2024 12:49 PM	System Administrator	
08/01/2024			Medication Management (Psychiatry)	Auto Added on Client Save	08/01/2024 12:59 PM	System Administrator	

Note Report Queuing

- We are pleased to announce the introduction of advanced note report functionalities in the Provider Portal.
- **Note Report Queuing:** Users can now queue multiple note reports for batch processing and download. This feature leverages the filtering of the note grid on the client's chart, allowing for the generation and retrieval of several reports at once and streamlining report management.

The screenshot displays the 'Assessment Notes' section of the Provider Portal. At the top, there are tabs for 'Client List', 'Status Log', and 'Notes'. Below the tabs is a search bar and two buttons: 'Export to Excel' and 'Queue Complete PDF Report'. The 'Queue Complete PDF Report' button is highlighted with a yellow circle and a yellow arrow pointing to a modal dialog box. The dialog box contains a green checkmark icon, the text 'Note Reports Queued', and a message: 'The Note PDF Report containing 9 Notes has been queued and you will be notified when completed.' Below the message is an 'OK' button.

Note #	Service Date	Performed By	Billing Code	Location Code	Released	Release By Date	Released For Review	Face To Face	Duration	Note Type
View Note Report A-C-104-73	8/5/2024 2:34 PM	System Administrator	(600)Internal Communication / Comment	02 - Telehealth	<input checked="" type="checkbox"/>	8/29/2024 6:58 PM	<input checked="" type="checkbox"/>	<input type="checkbox"/>	5	
View Note Report A-C-104-72	8/5/2024 2:32 PM	System Administrator	(00611)Code 1	02 - Telehealth	<input type="checkbox"/>	8/29/2024 6:58 PM	<input type="checkbox"/>	<input type="checkbox"/>	5	
View Note Report A-C-104-71	8/5/2024 2:32 PM	System Administrator	(00611)Code 1	02 - Telehealth	<input type="checkbox"/>	8/29/2024 6:58 PM	<input type="checkbox"/>	<input type="checkbox"/>	5	
View Note Report A-C-104-70	8/5/2024 2:26 PM	System Administrator	(00611)Code 1	02 - Telehealth	<input type="checkbox"/>	8/29/2024 6:58 PM	<input type="checkbox"/>	<input type="checkbox"/>	5	
View Note Report A-C-104-69	8/5/2024 2:25 PM	System Administrator	(00611)Code 1	02 - Telehealth	<input type="checkbox"/>	8/29/2024 6:58 PM	<input type="checkbox"/>	<input type="checkbox"/>	5	
View Note Report A-C-104-68	8/5/2024 2:22 PM	System Administrator	(00611)Code 1	02 - Telehealth	<input type="checkbox"/>	8/29/2024 6:58 PM	<input type="checkbox"/>	<input type="checkbox"/>	5	
View Note Report A-C-104-56	8/1/2024 1:03 PM	Bailey Alex	(00611)Code 1	02 - Telehealth	<input type="checkbox"/>	8/29/2024 6:58 PM	<input type="checkbox"/>	<input type="checkbox"/>	5	
View Note Report A-C-104-59	7/17/2024 1:00 PM	Lori Hale	(90832)Psychot... 30 min	02 - Telehealth	<input checked="" type="checkbox"/>	8/29/2024 6:58 PM	<input type="checkbox"/>	<input checked="" type="checkbox"/>	6	

- **Download Alerts:** Notifications will be sent to users when the queued note reports are ready for download, ensuring timely access to the reports.
- These enhancements are designed to improve the efficiency and convenience of managing note reports within the Provider Portal.

Client Insurance Templates

- We are pleased to announce the addition of templates to the Insurance notes field in the Provider Portal.
- **Template Integration:** Users with the appropriate profile rules for template usage can now add and modify templates within the Insurance notes field.
- **Enhanced Free Text Area:** Templates can be utilized in the free text area, providing a standardized and efficient way to manage and enter insurance notes.
- This update enhances the functionality of the Insurance notes field, allowing for more efficient and consistent note-taking.

The screenshot displays the 'Insurance' section of a client record for 'Anderson, Grace'. The form includes fields for 'Client Legal Name if Different (Please enter First and Last)', 'Client Legal First Name', and 'Client Legal Last Name'. Below these are tabs for 'Primary Insurance', 'Secondary Insurance', and 'Tertiary Insurance'. The 'Primary Insurance' tab is active, showing fields for 'Insurance Company' (Health First), 'Group Number' (31435), 'Individual Number' (24689655), 'Effective Date' (04/30/2024), 'Expiration Date' (04/30/2025), and 'Deductible' (2000.00). A 'Notes' field is present, with a blue 'Eligibility' button and a yellow-bordered '+ Add template' button. A 'Save' button is located in the top right corner.

Field	Value
Client Legal Name if Different (Please enter First and Last)	
Client Legal First Name	
Client Legal Last Name	
Insurance Company	Health First
Group Number	31435
Individual Number	24689655
Effective Date	04/30/2024
Expiration Date	04/30/2025
Deductible	2000.00

Add Template

Add Template

Check the template(s) you would like to insert. Then click "Insert Template(s)" button.

Primary Insurance Templates Hide Inactive **Insert Template(s)** New Template Save

	Template Name	Template Description	Template	Active	
<input checked="" type="checkbox"/>	Insurance Verification		Date: Payer Number: Insurance phone number: Ref. # Co-payment: Co-Insurance: Max # of visits/year: Deductible: Met: TELEHEALTH covered YES NO COB: Coordination of Benefits(other ins on file) NO Authorization Needed Provider to get Authorization : Authorization date: Additional notes:	<input checked="" type="checkbox"/>	

Inserted Template

Client List Anderson, Grace

Dashboard Insurance Insurance

Primary Insurance Secondary Insurance Tertiary Insurance

Insurance Company Health First

Group Number 31435

Individual Number 24689655

Effective Date 04/30/2024

Expiration Date 04/30/2025

Deductible 2000.00

Co.Pay 50.00

Requires Pre Authorization

Of Visits

Co.Ins. %

Notes Eligibility + Add template

Date:

Payer Number: Insurance phone number: Ref. #

Co-payment: Co-Insurance: Max # of visits/year:

Deductible: Met:

TELEHEALTH covered YES NO

COB: Coordination of Benefits(other ins on file)

NO Authorization Needed

Provider to get Authorization :

Authorization date:

Client Statement Report

- We have added a new "Statement" report to the Payment History screen on the Client Portal. This enhancement allows clients access to open the Statement report directly within the Client Portal, providing quick and easy access to their statements.

The screenshot displays the Client Portal interface. At the top, there is a navigation bar with links for Home, Messages, Profile Information, Complete Forms, Insurance Information, and Appointments. Below this is the 'Payments' section, which includes tabs for Statements, History, and Contact Billing. A table lists payment entries with columns for PAYMENT, AMOUNT, SERVICE, INVOICE, and a 'Statement' button. A yellow circle highlights the 'Statement' button, with an arrow pointing to a larger 'Statement Report' window.

The 'Statement Report' window shows the following information:

Jackson Office2
 321 Mail Address Street
 Clyde, NC 28837
 www.mysites.com
 Phone: (987) 987-9879 Fax: (987) 987-9879

Grace Andrews
 45678 Morton Ave
 Asheville, NC 52143

Client: Grace Andrews
Client #: A-C-9527
Printed: 08/28/2024

Description	Date	Total Charge	Payer Paid	Adj.	Deductible	Client Portion	Client Paid	Total Due
H2022 HC Intensive In Home	08/04/16	0.00	0.00	0.00	0.00	0.00	0.00	0.00
H2012 Day Treatment	08/08/16	0.00	0.00	0.00	0.00	0.00	0.00	0.00
CMP Psy dx interview	08/10/16	0.00	0.00	0.00	0.00	0.00	0.00	0.00
H2012 Day Treatment	08/30/16	0.00	0.00	0.00	0.00	0.00	0.00	0.00
90804 Psydx, office, 20-30 min, H2022 HC Intensive In Home	11/03/16	0.00	0.00	0.00	0.00	0.00	0.00	0.00
4000F Tobacco Counseling, 99635 Additional Therapy 2 no Bill, 99635 Additional Therapy 2 no Bill, 99635 Additional Therapy 2 no Bill	01/05/17	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Totals:		\$255.00	\$0.00	\$0.00	\$0.00	\$255.00	\$100.00	\$155.00

Due Date: 9/12/2024 **Total Due: \$155.00**

Testing the statement message for the portal.
Comments:

Aging:

< 30 Days 31-60 Days 61-90 Days 91-120 Days > 120 Days
 \$155.00