

Weekly ‘To-Do’ List

(Estimate: 20 Minutes = Videos 7-min + 10-minute Read)

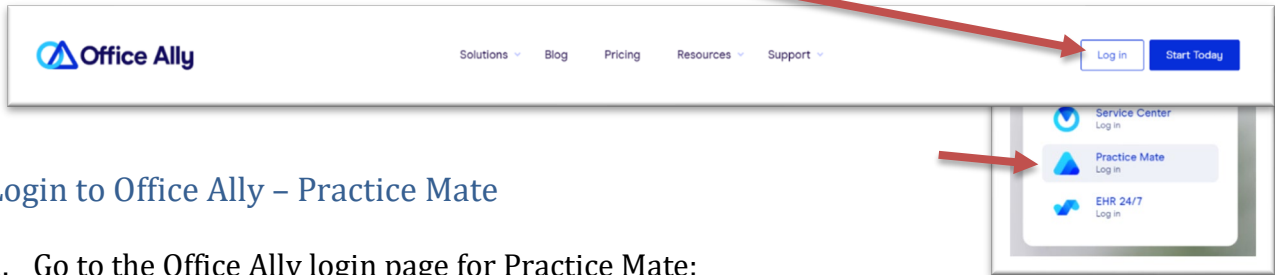
Best Practices for billing charges and managing correspondence in Office Ally-Practice Mate.

Username: _____
(email address)

Password: _____

Browser Troubleshooting. Try the following steps before calling support to save time.

1. Try using [Google Chrome](#).
2. [Reset and clear](#) your [browser cache](#) and cookies.
3. Make sure [pop-ups](#) are not blocked by your browser.

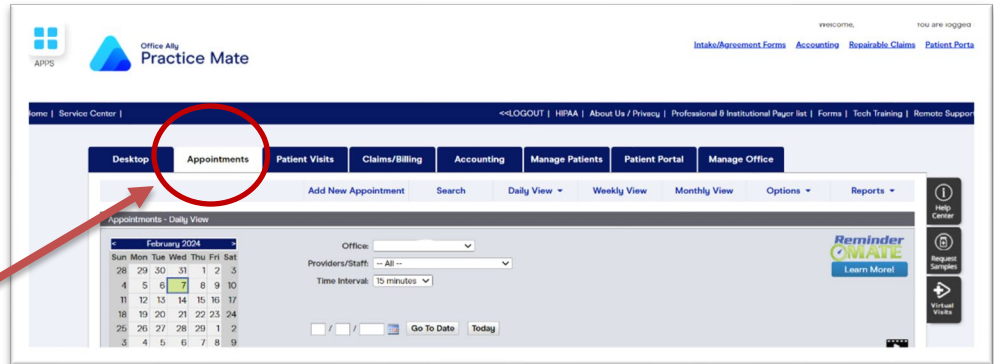


Login to Office Ally – Practice Mate

1. Go to the Office Ally login page for Practice Mate:
<https://cms.officeally.com/practicemate>
2. Select [**Practice Mate Login**] from the drop-down menu.

If you are directed to the SERVICE CENTER, close your browser window, and try logging in again.

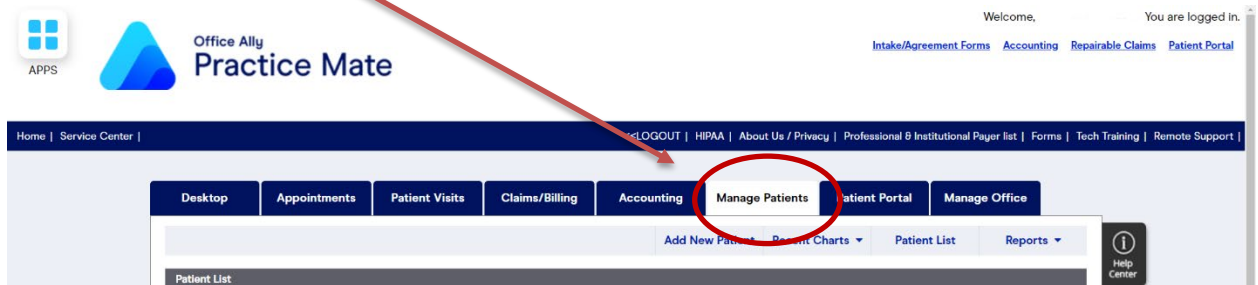
3. Your account will open to your “**Appointments**” tab.



(Note: recording and keeping your appointments in Office Ally is optional.)

Create Visits – Manage Patients Tab

1. Watch the [training video](#) (Runtime 2:55)
2. Click the ‘**Manage Patients**’ tab in Practice Mate.



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3. **Patient Record.** Select the patient that you would like to create a visit for.
4. **Template.** When the patient’s record opens, select the “**Template**” tab on the lower row of tabs.

The screenshot shows the 'Edit Patient' interface for Patient ID: 135721815. The patient's name is John Doe, DOB is 01/01/1900, and the account type is Primary Insured/Guarantor. The 'Template' tab is highlighted with a red circle. Below the main tabs, there is a section for 'Patient Demographics' with fields for Last Name, First Name, Middle Name, DOB, Sex, and SSN.

5. Click the blue link: “**Create New Visit**” in the patient’s template.

The screenshot shows the 'Template' tab selected. A message states: "Use this template to setup the default values for this patient's new visit or HCFA claim. Please note that this option will work only if you create new visit or new claim from here." A blue link labeled "Create New Visit" is circled in red.

6. You will have three tabs when you add a new visit.

Most routine visits only need info in the first two tabs: “Visit Info” & “Billing Info”.

The screenshot shows the 'Add New Visit' interface with three tabs: 'Visit Info', 'Billing Info', and 'Billing Options'. The 'Visit Info' and 'Billing Info' tabs are circled in red. There are 'Update' and 'Cancel' buttons on the right.

7. **Visit Info Tab.**

- a. **Patient ID.** Review patient name and contact information to ensure that it is correct and current.
- b. **Visit Date.** Enter the correct date of service. This field will default to ‘today’s’ date.
- c. *Reason for Visit is an optional field which can be customized. It’s useful when you use Practice Mate for appointments and scheduling.*
- d. **Primary / Secondary Insurance.** Review the patient insurance information to ensure that it is correct and current.



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Add New Visit Update Cancel

Visit Info **Billing Info** **Billing Options**

Q Search for Patient (Enter Last Name / First Name / Home Phone / Cel) Add Patient + Edit Information

Patient ID: 135721815 Last Name: Doe First Name: John Middle Name / Mt:
DOB: 1/1/1900 Sex: M Phone: 541-234-4781
Address: PO Box 503010, White City, OR 97503 edit

Visit Date (mm/dd/yyyy): 2 / 5 / 2024 Vital Signs: Weight:
Height:
Temperature:
Blood Pressure:

Reason for Visit: In Office - Psychotherapy (max 500 chars)
Chief Complaints:
Allergies:

Provider ID:
Provider (First/Last):
Office: -- All --
Primary Insurance
Insurance Co. ID: 9253623 Insurance Name: CIGNA Behavioral Health
Patient Relationship To Primary Insured: Self Accept Assignment? Yes
Primary Insured 135721815 Last Name: Doe First Name:
Phone: Address: PO Box 503010, White City, OR 97503
Subscriber ID: ABC123 Group No: G456 Plan Name: TEST Plan
Secondary Insurance
Insurance Co. ID: Insurance Name:
Patient Relationship To Secondary Insured: -- select one --
Sec. Insured: Last Name: First Name:
Phone: Address:
Subscriber ID: Group No: Plan Name:
Guarantor: Last Name: First Name:
Phone: Address: edit

Update Cancel

TIP: When you use the ellipsis [...] button to select your CPT code, the line charge will populate automatically based on your standard fee schedule. To add codes / fees to your standard fee schedule, contact Professional Practice.



8. Billing Info Tab. Check to ensure that the following information is correct and current for the visit being recorded:

- a. ICD-10 Diagnosis code
- b. Date of Service
- c. POS (Place of Service Code)
- d. CPT Procedure Code
- e. ICD-10 Pointer (usually 'A' or '1')
- f. Line Charge
- g. Days/Units

The screenshot shows the 'Billing Info' tab in Office Ally. It features three sub-tabs: 'Visit Info', 'Billing Info', and 'Billing Options'. The 'Billing Info' sub-tab is active. Below the sub-tabs are sections for 'Diagnosis Codes', 'ICD-9 Codes', and 'ICD-10 Codes'. The 'ICD-10 Codes' section includes a 'Select Code(s)' dropdown and a list of codes with descriptions. Below this is a 'Billable Line Items' table with columns for Line No, DATE(S) OF SERVICE (From/To), POS, CPT, Modifier (A, B, C, D), ICD-10 Pointer, Line Charge, Days or Units, Ins. Paymt, Patient Paymt, Adj, Balance, and Clear. The first row of the table is populated with data: Line No 1, DATE(S) OF SERVICE From 2/5/2024, POS 90837, CPT 90837, ICD-10 Pointer 1, Line Charge 225.00, and Balance 225.00. At the bottom of the interface, there are buttons for 'Update' and 'Cancel', and a 'Superbill' button.



9. **Billing Options Tab.** The ‘Billing Options’ tab is used for unusual situations, such as claims to auto insurance, workers compensation insurance, corrected claims, and incident-to claims. Contact Professional Practice if you have claims that will likely be billed this way.
10. **[UPDATE].** Scroll down and click the [Update] button in the lower right corner.
11. **Visit History.** You will land on the patient’s ‘Visit History’ page, showing the new visit that you just entered in “Open” status.

Edit Patient - [Patient ID: 135721815]

Patient ID: 135721815 Last Name: Doe First Name: John
 Middle Name / MI: DOB - Age: 01/01/1900 - 124 yrs. 1 mo. old Sex: M
 Pat. Acct. No.: JoDo JD Account Type: Primary Insured/Guarantor SSN: --
 Primary Care Provider: Referring Provider: Account Status: Active
 Clear Clear
 Patient Responsibility Balance: Calculate Balance Do not print Billing Statements

Patient Data **Insurance** **Payments** **Appointments** **Visit History** **Template** **Health Records** **Documents** **Alerts**

Patient Visit History:

Visit ID	Date Visited	Reason For Visit	Provider	Total Charges	Balance	Status	Claim No	Secondary Claim No	Create Claim
447682515	02/05/2024	In Office - Psychotherapy		\$225.00	\$225.00	Open			e

Page 1 of 1 View 1 - 1 of 1

Print Patient Demographics Update Cancel Apply

12. **[UPDATE].** Review the charge details to ensure they are correct and click [Update] in the lower right corner.
13. You will land on the *Patient List* in the ‘Manage Patients’ tab, where you can select another patient to add another new visit.

Payment Received (In Office)

Follow these steps to record a payment that you receive directly in your office from a patient.

Shortcut to create a new payment = **F8**

NOTE: If you receive payment from an insurance company, please email, fax, or mail the payment (or a copy of the payment) to Professional Practice so that we can record and apply it. Insurance payments must be recorded differently from patient payments, and we often need information from the payment EOB in order to complete the process (ie: bill secondary insurance, apply properly, and calculate patient balance).

1. Go to the “**Accounting**” tab in Office Ally – Practice Mate.

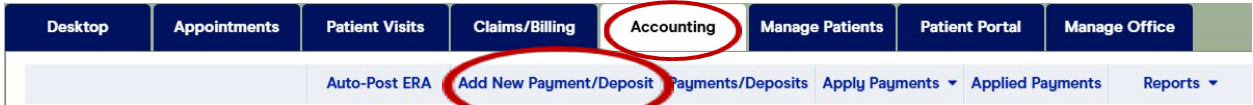


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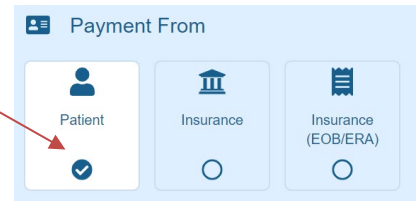
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2. Select “Add New Payment/Deposit” from the grey list of options below the dark blue row of tabs.



3. Select the office and provider to whom the payment was made.

4. Select the ‘Patient’ radial button to indicate the payer.



5. Skip the “Patient ID” field unless you happen to know the patient’s Office Ally-generated patient ID#.

6. Type in the patient’s last name or first name and click [Search].

7. Scroll down and select the patient from the patient list below.

Patient Search

Filter A

Last Name: [] Starts With: [] **doe**

Filter B

First Name: [] Starts With: []

Date of Birth: [] **Search**

Patient ID	Patient Account No	Last Name	First Name	MI	Preferred Phone	Date of Birth	Gender
135714745	JD JoDo	Doe	John		541-941-7792	1900-01-01 08:00	M

Payment Method

Card Terminal:

Virtual Terminal:

Card On File:

Record Payment:

Process Payment →

8. Click the patient’s name to select the patient, and then click the “Record Payment” radial button below.

9. Click [Process Payment →] to enter the payment amount and other payment details.

10. In the Process Payment screen, select the correct radial button to indicate the payment method, and enter the payment date and other details as appropriate.



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11. **NOTE:** You can record credit card payments made by outside merchant service accounts (like Square, IvyPay, etc) using the “Credit Card” radial button indicator. We are working on setting up functionality for you to be able to process credit cards from within Office Ally on this screen. I’ll let you know when that feature is available. In the meantime, you’re welcome to send us completed credit card payment authorization forms, and we will process/charge and record credit card payments from patients.

12. Click [**Submit**]

13. You will be brought back to the “**Accounting**” screen, and your new payment record should show up as the first payment record on the list.

14. You can apply patient payments yourself, if there are specific instructions for their application. This can be useful in cases where multiple parties are guarantors for one patient’s account. Otherwise, we will apply patient payments as indicated by the patient’s insurance company when their claims are processed.

Additional Resources.

For more in-depth information on this topic and others, you can access the following links.

Office Ally Support Suite: <https://support.officeally.com/Patient Visits Tab> – In Depth Information / Step-by-Step

Office Ally Training Videos (On-Demand)
<https://cms.officeally.com/Home/VideoLibrary.aspx>



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