PATIENT ACCOUNTING TRAINING
Most collection activity will occur in SMS Patient Accounting. However, any changes to patient demographics or insurance will need to be done in Cerner PMOffice.

Demographic changes should be called in to the Registration Office to change in PMOffice.

Insurance changes should be done by the Patient Accounting Office in PMOffice.

Eligibility checking will also occur in PMOffice.

Diagnosis information for inpatients will be flow through the SMART system prior to posting in SMS Patient Accounting.
Sign in to Citrix and select PMOffice
Double click on the Patient Accounting Conversation
At the encounter search screen, enter the patient identifying information and click search. Highlight the encounter you would like to modify and hit the ok button.
If the patient has been discharged for over 5 days, you will get a warning message informing you of such. Click YES if you want to continue to modify the encounter.

You will be able to view and modify various pieces of patient information by clicking on the different tabs.
You can modify guarantor information by clicking on the Guarantor tab.

Here you can change whether the guarantor is institutional or not, the patient relationship to the guarantor and the guarantor demographics. The yellow fields are required.

Anytime you select self in the relationship field in Guarantor or Insurance tabs, the patient information will default in.
If you want to change primary insurance or information related to primary insurance, click on the insurance primary tab.

Here you can change things such as insured name, policy number etc.
Note the employment status. If the status full or part time, you will need to click on the Search for Employer button and find the appropriate employer. You MUST click on the address of the employer and then click OK.

If status is Retired, you will need to enter a retirement date, if a student, you will need to enter the school.
If you want to change the insurance, click on the Search for Health Plan button.
Type in the Plan Name and hit the box with the 3 dots in it.

When you find your plan, you MUST highlight the address in the bottom box before you click the OK button.
The insurance information will default in. The yellow fields are required. You can complete the other fields if necessary. If the insured card name is the same as the patient name, just type the word “same” in the Insured Card Name Last field and the patient name will default in.
These actions will automatically put an end effective date on the insurance you are replacing. The insurance will remain, however, in the insurance summary tab for future reference.

Click on the Insurance Summary Tab.
You can select service types to be associated with the insurance on this tab. Click on the service and click on the move button.
You can also run insurance eligibility from this tab.

In the Coverage Summary box, click on the very first icon (right above COB.)

An hourglass will appear, when it disappears and the icon changes, click on the 2\textsuperscript{nd} icon to view eligibility results.
If you want to add additional insurances, select the next empty insurance tab (either secondary, tertiary or quaternary insurance) and enter all info.
If you want to RE-ORDER insurances, go back to the Insurance Summary tab. Right click on the insurance you want to move.

Click on Swap Plan.
Enter the position you want the insurance to be in the box “Enter new priority number for the highlighted row.” In the case below, Cigna for Seniors is in the 2 (secondary insurance position.) To move it to the first position, change the 2 in the box to a 1.
The secondary insurance then moves to the primary insurance position.
You can also change insurance effective dates in the Insurance summary screen. Right click on the insurance and select Update Effective Dates.
Complete the information and click ok
If UB04 information needs to be entered, such as condition codes, value codes, occurrence codes and span codes, click on the UB04 tab and complete the information.
If the patient is a Medicare patient, the MSP tab can be selected. Here, the MSP information can be entered, edited or viewed.
WHEN YOUR WORK IS COMPLETE IN THE PATIENT ACCOUNTING CONVERSATION, YOU MUST HIT THE COMPLETE BUTTON AT THE BOTTOM OF THE SCREEN.