

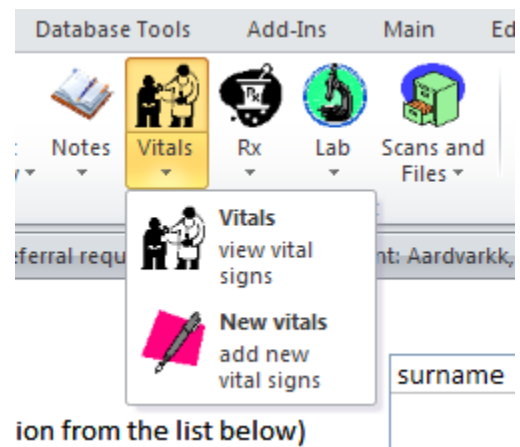
Introduction

Welcome. This brief manual should help get you started using the program. Features are listed by tasks. Feel free to explore the various features of the program.

The **Getting into the Details** manual (pdf file) is a more complete reference to billing etc. It is present on the program CD and in the program folder.

The program is under continual development and improvement. Let me know if you have any suggestions.

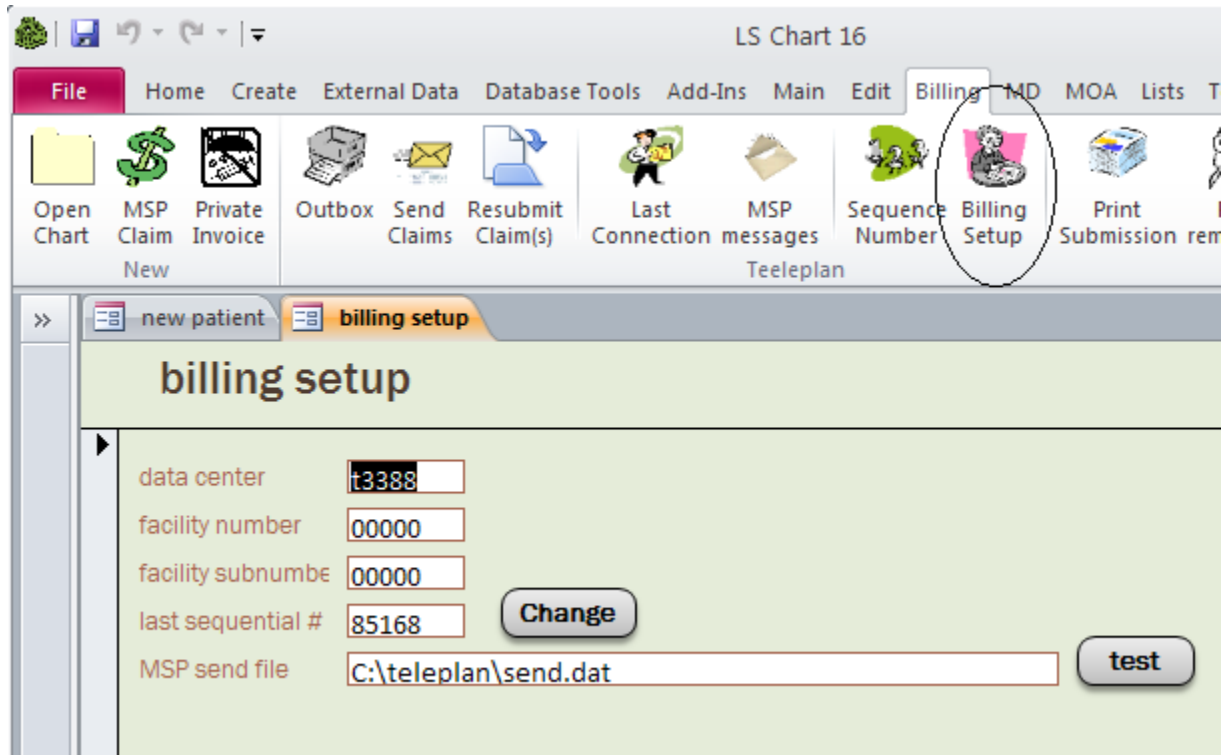
- LSchart is a full featured EMR program
- It utilizes MS Access 2010 as it's engine. Many useful features of Office 2010 are available
- The office ribbon is used to speed navigation- Icons and tabs allow access to program features
- Some buttons have extra dropdown choices- these buttons have a small triangle below the picture as in the example to the right
- If you have a small or large monitor you can maximize or minimize the ribbon by right clicking over a blank area of the ribbon
- Functions are grouped by general category such as billing, Input etc.
- The MOA and MD tabs group common functions by user type



Gerry Luco M.D.

September 2010

Before You Send MSP claims: Setting up Billing



- These options need to be setup before you send claims the first time
- select the Billing tab and click the Billing setup button
- Enter your data center number (call Teleplan support if you need a data center number)
- Facility number and facility subnumber are “00000” unless you are told to use another number by Teleplan support
- The last sequential number should be **0** unless you have used this datacenter before. If you need to change the number click the **Change** button
- **The MSP send file** is the name of the file you will send to MSP via Teleplan when you connect via the Internet
- Add users- see the next page

Before You Send MSP claims: Setting up Providers

The screenshot shows a software interface with a top navigation bar containing tabs: File, Home, Create, External Data, Database Tools, Add-Ins, Main, Edit, Billing, MD, MOA, Lists, and Tools. Below the navigation bar are icons for various functions: Pharmacies, Referral MDs, Phone List, Rosters, Drugs, Lab Tests, Providers (circled), Fee Schedule, Exp codes, and Clients/3rd parties. The main window displays the 'providers' form with the following fields:

surname: Wilson specialist:
payee: 12345 pract: 12345
license: 015842333
mailing name: Dr Bob wilson
address: 21 Elm St
city + prov: Kamloops B.C.
postal code: V7J2F5
phone: 604*555-1212 fax:
opted out status: not opted out (I)
default service clarification code: 00

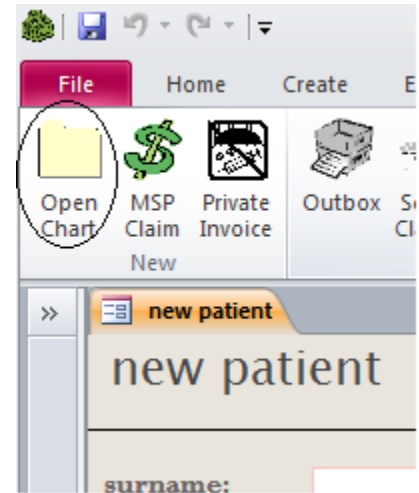
Disclaimer for Rx: This prescription represents the original of prescription drug order. The pharmacy address noted above is the only intended recipient there are no others. The original prescriptive has been invalidated and surely filed, and it will be transmitted elsewhere at another time.

address	city + prov	postal code	phone	f
203- 2020 Richmond Rd.	Victoria B.C.	V8R6R5	595-4252	595-46
21 Elm St	Kamloops B.C.	V7J2F5	604*555-1212	

- Select the lists tab and click Providers
- Enter your billing information
- The mailing name, address etc. are used for various printouts
- Disclaimer for Rx- used for faxing prescriptions.
- Opted out status- used by some allied practitioners such as chiropractors

How to send claims to MSP: Creating New Claims

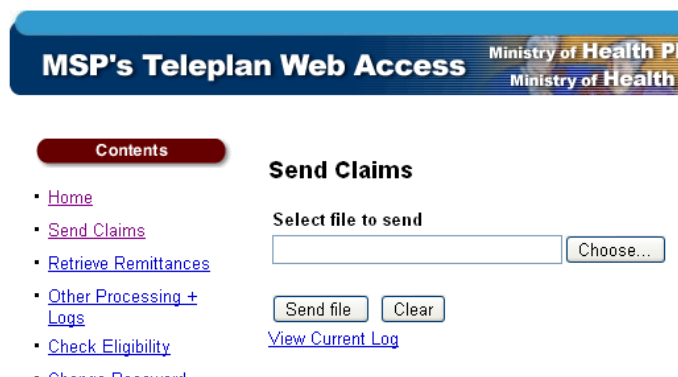
- Follow these steps to send claims to MSP
- If you are billing for a new patient go to the **Patient info** tab to enter the appropriate details, then save the patient by clicking the **Save** button (or pressing **Control+S**)
- For a previously entered patient- select a patient by performing a search by clicking the “open chart” button
- If a doctor is listed in the dropdown “**doctor**”- that provider’s billing information will automatically be entered in the next MSP claim
- You can also select a patient from the schedule
- Click the MSP claim button (if you are using the schedule use the special MSP claim button on the schedule (the program will make sure all scheduled appointments are billed)

A screenshot of a 'new patient' form. The form has a header with 'new patient' and a button labeled 'msp'. Below the header, there are several input fields: 'surname:', 'first:', 'middle:', 'doctor:' (with a dropdown arrow), 'phn:', and 'last referral:'. The 'doctor:' dropdown menu is circled in red.

- **Control +B** will also create a new MSP claim
- Fill in the MSP claim details, then save the claim
- These new claims will be placed in the **Outbox**- click that button on the Billing tab to view or edit the list of new claims
- The outbox is backed up whenever you send claims to MSP or change the sequential number

How to send claims to MSP: Sending Claims to MSP

- Once you have created some claims it is time to send them to MSP
- Check the outbox under the billing tab to make sure the claim list is correct
- Click the **Send claims** button under the Billing tab to bring up the MSP claim wizard
- Click the **send claims to MSP..** button and follow the prompts
- Your web browser should start automatically- log on using your user name and password received from Teleplan support (the password needs to be changed when sending claims for the first time)
- Click the **Send Claims** link
- Click the “Choose” button to select your MSP send file, check in the Teleplan folder on the C: drive for the file named **send.msp** or **send.txt** that you entered when setting up billing
- Click the Send file button to send the selected file to MSP- this file contains all of your claims
- Check the message to the bottom right when done to make sure the claims were sent properly
- If you receive a sequential number error:
 - make sure you record the last **committed** claim number from the Teleplan screen
 - Quit the Teleplan site
 - Go back to LS chart and click the “sequence number button on the billing tab
 - Follow the prompts to set the proper number
 - Go to the outbox and send the claims
- If there were no problems- retrieve remittances (next section)



How to send claims to MSP: Retrieving Remittances

- While logged on to Teleplan click Retrieve remittances
- Save- do not open the file
- Save the file somewhere easy to find such as the Teleplan folder (mentioned above)
- If you accidentally open the file and see a lot of computer gibberish- just save the file as in the above steps
- Once the file has been saved, quit your Internet browser and go back to LS chart
- Click the yes- **open the remittance file** to process the remittance
- Claims will be updated (bi-weekly) to show which claims were paid or rejected
- MSP messages and payment details will be loaded
- To check the status of previously submitted claims click the **Claim log** button on the billing tab
 - You can re-bill claims from this screen or perform various searches (the **select claims** button)
 - Other reports are available from the Billing tab



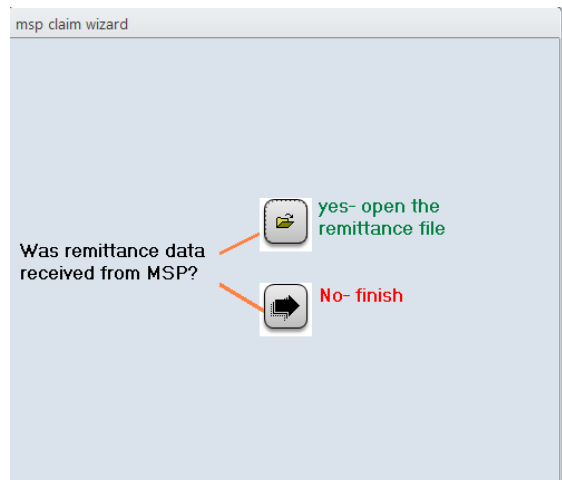
Contents

- [Home](#)
- [Send Claims](#)
- [Retrieve Remittances](#)
- [Other Processing + Logs](#)
- [Check Eligibility](#)
- [Change Password](#)

Send Claims

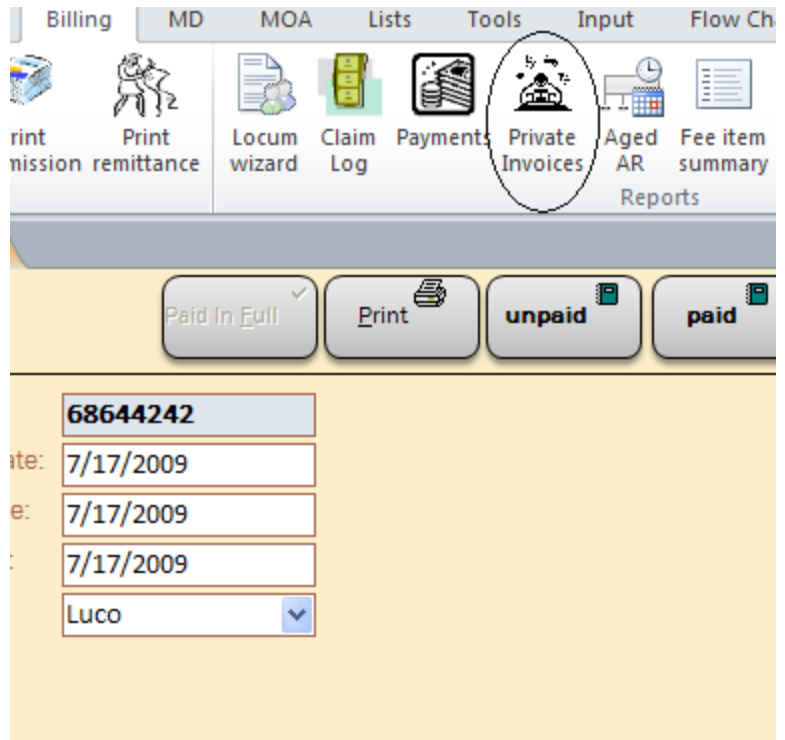
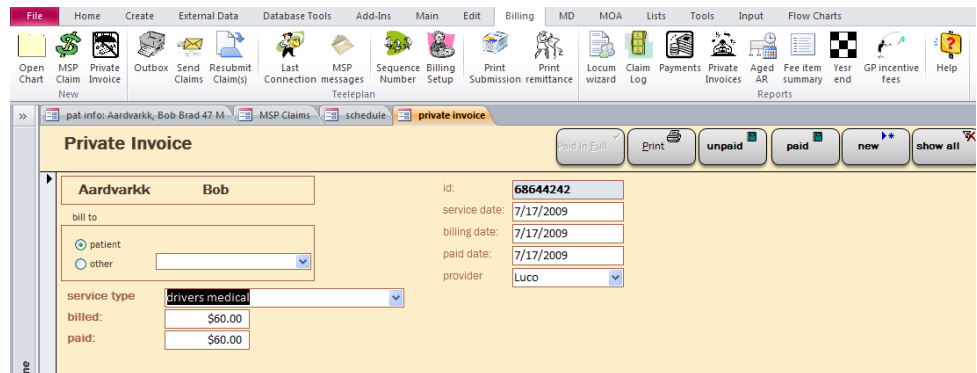
Select file to send

[View Current Log](#)



Private Claims

- To create a private (non-MSP) claim click the Private invoice button on the Billing tab
- To bill the claim to a third party (such as lawyer) change the **Bill to** option
- The various buttons access other functions
- The **Private Invoices** button brings up more generalized reports on other patients



The Schedule

- Multiple providers and locations are possible using the schedule
- MSP claims can be created from the schedule
- Clinical notes are also tracked for each appointment
- To setup the schedule:
 - Click the schedule button
 - Select a provider from the doctor dropdown
 - Select (or enter a new) location such as office or hospital
 - Click the setup schedule button to build your new schedule. You can enter different appointment slots for each day
 - Click the Build schedule button

select doctor

select location

Please fill in blank appointments times for ea

monday		tuesday	
▶	8:30	▶	8:30
	8:40		8:40
	8:50		8:50
	9:00		9:00
	9:15		9:15
	9:30		9:30
	9:45		9:45
	10:00		10:00
	10:15		10:15
	10:30		10:30

pat info: Aardvarkk, Bob Brad 47 M MSP Claims schedule

Thu September 30 2010 doctor Luco location office

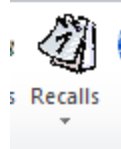
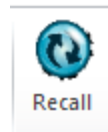
check claim before saving pract: 05163 payee: 05163

start	surname	firstname	a	s	icd9	fee_item	referral	hphone	visit_code	note
8:30	Aardvarkk	Bob	47	M				555-1212	12	
8:40										
8:50										
9:00										

- The various schedule buttons can be used to navigate
- To search for a diagnostic code just type a search term such as "pneumonia" In the icd9 box- the program will perform a quick search
- Age based fee items are automatically corrected
- Use the MSP claim button on the schedule to keep the schedule updated- claims are filled in based on schedule details
- If you are using a locum just change the **pract** and **payee** numbers on the top right to bill the claims properly

Recalls

- Recalls are created by clicking the **Recall** button available on several tabs
- For recurring recalls enter the final date (or check the no end date box). Recall will recur at the interval selected
- The **Recalls** button (also available on several tabs) will bring up a list of recalls that are now due- or you can select a view of all recalls entered



enter recall

create recall

current patient: Aardvarkk, Bob Brad 47 M

recall in on

repeat apt until no end date

reason

note

Orders

- To keep track of orders and bookings such as X-rays, electro-diagnostics etc. click the **orders** button and enter the appropriate details.

book item current patient: Aardvarkk, Bob Brad 47 M

item: <input style="width: 90%;" type="text"/> location: <input style="width: 90%;" type="text"/> date: <input style="width: 90%;" type="text" value="9/29/2010"/> date entered: <input style="width: 90%;" type="text" value="9/29/2010 10:30:41 PM"/>	<input type="checkbox"/> patient aware date: <input style="width: 50%;" type="text"/> <input type="checkbox"/> booked booked date: <input style="width: 50%;" type="text"/> <input type="checkbox"/> cancelled cancelled date: <input style="width: 50%;" type="text"/> <input type="checkbox"/> refused by patient on date: <input style="width: 50%;" type="text"/> <input type="checkbox"/> message left date: <input style="width: 50%;" type="text"/> <input type="checkbox"/> sent date: <input style="width: 50%;" type="text"/> <input type="checkbox"/> mailed <input type="checkbox"/> faxed <input type="checkbox"/> need to book <input type="checkbox"/> specialist_aware	<input type="checkbox"/> phone <input type="checkbox"/> on w <input type="checkbox"/> comp
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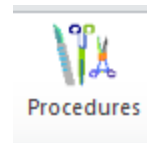
- If you check the **need to book** box the order will appear in the MOA inbox

Referrals

- Click the referrals button to create a new referral
- To send the patient summary or lab results check the appropriate boxes
- To send selected reports select them on the list to the right
- To send the consult click the **Send** button
- All of the reports will be saved in a folder of your choice
- To fax or print these results drag them to your printer icon (create on your desktop)
- These folders can be deleted when done- they are only a copy of the chart data

Procedures

- Click the procedures button to track various procedures such as foot exams, paps, etc.
- You can enter a brief note



Saved Forms

- This area allows you to save and organize any files you like
- You can save requisitions, forms, patient handouts etc.
- They can be organized by categories
- Files are accessible to all users of the program



Clinical Notes

- These are entered from the Input tab- **Clinical notes**
- The various buttons will insert chart details- useful for hospital admission histories etc.
- If you make a mistake errors can be corrected under the Tools tab- click the **manage chart** button.
- An audit trail is kept of all changes
- Blood pressure readings and new prescriptions are automatically displayed in the notes
- Other clinical details such as vital signs, Past History, Family history etc. are available from the MD tab

The screenshot shows a clinical notes interface for a patient named Aardvark. The patient's name is displayed at the top in three columns: Aardvark, Bob, and Brad. Below the name, there is a 'problem:' field with a dropdown arrow, a 'date:' field with the value '9/29/2010', and a 'doctor' field with the value 'Luco' and a dropdown arrow. Below these fields are several buttons: 'allergies', 'Rx', 'problems', 'PH', 'FH', and 'social'. The 'allergies' button is highlighted. The main content area displays the following text: 'Allergies: ACE inhibitors, aminoglycosides, amoxapine, bees, frogs, penicillins'.

Rosters

- Rosters are a powerful feature of the program. You can build lists of patients, track clinical details, view flow charts, and keep track of GP incentive billings
- You can also find all patients taking a certain drug (a good feature if a drug is recalled etc.)
- To create a roster follow these steps:

- Go to the **Roster List** Lists tab and click **Rosters**

- Create a new roster- for example diabetes
- If the list should be tracked for GP incentive fees such as 14050 check the **GP incentive eligible** box
- Save the roster
- Click the **View patient list** button
- To add patients click the **Import patients** button
- To find patients by billed diagnostic codes etc. select the appropriate button

- You can perform multiple searches
- The **add patients to roster** button will add patients from the list to the selected roster (no duplicates will be added).

Search

(you can select more than 1 condition from the list below)

- add patients taking a medication
- add patients by billed diagnostic code
- add patients by problem in notes
- add patients from another roster
- add patients with past history of illness
- add patients with family history of illness
- add patients with abnormal lab result:
- add patients by demographics

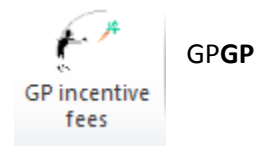
You can refine the 'search results' list by removing patients. Multiple selections are permitted. When complete you can add the patient list to a roster to save your search results (existing patients in the roster will not be duplicated).

search results

surname	firstname	middlename	sex	birthday	status	date_last_serv

clear list clear selected add patients to: amiodarone roster

- The **GP incentive** button on the Billing tab will show a summary of billings for GP incentive fees (worth more than \$10.00) for patients in rosters with the incentive eligible box checked
- Various flow charts are accessible from the **Flow charts** tab



Prescriptions

- Select the Rx button from the MD or MOA tab
- The **Settings** button will bring up a list of various options related to medications
- The **Drugs** button on the Lists tab allows you to view or edit the drugs that have been entered in the database
- The **change status** dropdown allows you to list a drug as active, not current, vaccine etc.- multiple selections are possible.

The screenshot shows a medical software interface with a patient record for 'Aardvarkk, Bob Brad 47 M'. The 'active rx' section displays a table of medications:

drug:	dosage:	freq:	amnt:	refills:	date:
amobarbital				0	Jun
amobarbital				0	Jun
arsenic				0	Jun
292				0	Oct
bufo vulgaris	12 D		1 1/2 od	0	Sep
amerge				0	Apr
rabeprazole				0	Apr
222				0	Apr
222				0	Apr
amiloride hcl				0	Apr
nystatin				0	Apr
altace	5 mg	od	30	2	Apr
Amoxil	250 mg	tid	30	0	Apr
amoxapine	50 MG			0	Jun
amoxapine	50 MG			0	Jun
palladium	6 X			0	Apr

The 'Rx settings' dialog box is open, showing options for print settings:

- print on:
 - 8.5 X 11: 4 per page (blank)
 - standard rx size: pre-printed
 - standard rx size: blank
 - 8.5 x 11 4 per page with disclaimer
 - tabular list
- print phn on rx
- set other patient's Rx to 'vaccine' when setting cur

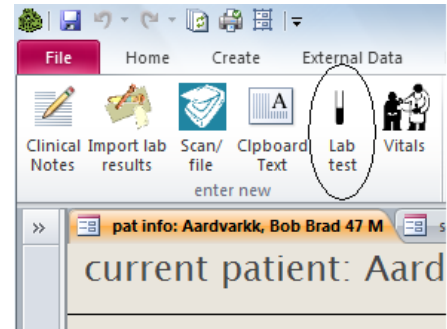
The 'Drugs' button in the navigation pane is highlighted.

Adding Scans and Other Documents

- There are two ways to add various documents and scans to a patient's chart
- from the Input or MOA tab select Scan/ add File
- the current patient will be listed- you can search for a different patient on the scan/ file form
- Select the date
- Enter a report type (such as X-ray, pathology report, consult letter)
- Enter a sub type (such as Chest X-ray, MRI knee)
- you can also enter a brief description
- Select the location of the file (if it is already saved on your hard drive) or one of the scan options
- To scan directly into the program you need to have loaded the scanning interface add-on- see the program installation notes if these options are greyed out
- Click the **scan** or **load file** button as appropriate
- Once saved you can enter more files for the same or other patients
- **Time saving tip:** Don't close the Scan/ File form after each scan- the program performs some housekeeping tasks when it closes the form that take a few seconds
- New scans are added to the patient's file and also show up in the MD inbox (listed by the MD assigned to each patient in the patient registration form)
- To save plain text as a report use the **Clipboard Text** button on the Input menu. The interface is similar to scanning a file.

Lab Results

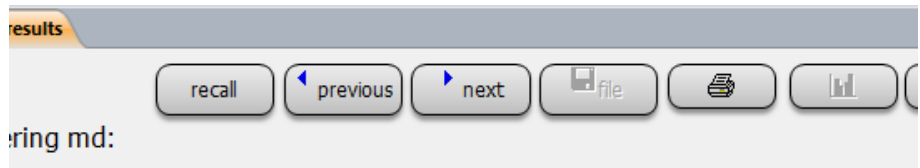
- LChart supports electronic downloads of lab results
- Lab results are added directly to the patient files
- If the patient is new he or she is added to the database
- Various reports can be generated
- To set up downloads from Excelleris see the installations notes
- To download results follow these steps:
 - Use the Excelleris application to save the results to your computer
 - Go to the Input tab and select **Import Lab results**
 - Locate the file you saved in the above steps



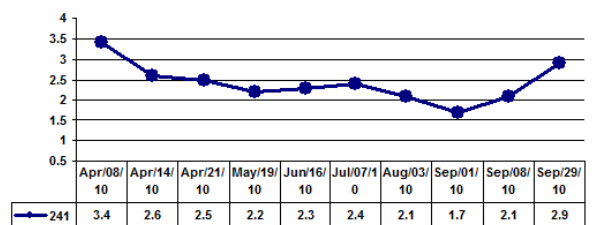
- To view new results check the MD inbox
- To enter a single test result manually- click the **Lab Test** button on the Input tab. This is useful for saving results generated in your own office such as pregnancy tests or tracking scores such as Framingham calculations.

- Several flowcharts are available from the **Flowcharts** tab

- To create a graph of lab results click on the line showing the result of interest and click the graph button on the top right of the lab results form



- The **INR wizard** under the **Tools** or MD (Rx dropdown) tab allows tracking of INR results graphically for warfarin patients as well as billing for anticoagulation advice



date_entered: billed

status:

instructions:

patient aware on date:

next_date:

previous notes

instructions	da
no change	
no change	

WCB Reports

- WCB reports can be created and sent electronically via Teleplan
- Follow these steps:

- Select WCB from the MD or MOA tab
- Enter the details for the claim

The screenshot shows a software window titled 'injury' with 'injury date: 5/28/2007' and 'claim number:'. The 'claim details' section includes:

- date of injury: 5/28/2007
- claim number: (empty)
- general category: (dropdown)
- general area: (dropdown)
- anatomic position: Left
- employer name: (empty)
- employer address: (empty)
- employer city: (empty)
- employer phone: (empty)
- ICD9 diagnostic code: 0011
- Description of the primary injury (diagnosis): due to vibrio cholerae ei tor
- Are you the worker's regular physician?: Yes
- If yes, how long has the worker been your patient?: (empty)
- Who rendered the first treatment?: (empty)
- Prior/ Other Problems Affecting Injury, Recovery, and Disability: (empty)

 On the right, there is a 'Reports' table:

SERVICE-DATE	pract	sent
5/28/2010	05163	

 At the bottom right, there are 'View report' and 'New report' buttons.

such as date, employer etc.

- Use the category, nature of injury etc. dropdowns to look up the various codes
- Save the claim details
- To create a new report click the **New Report** button and enter the appropriate details
- When complete click the **Send To WCB** button- the report will be added to the WCB outbox
- For later visits regarding the same injury click the **New Report** button to add subsequent reports
- To send the reports to WCB go to the MOA tab and click the WCB outbox (under the WCB button dropdown)
- You will be connected to Teleplan after clicking the Send To WCB button
- Send the reports exactly the same as MSP claims (the send file has the same name)
- Do not retrieve remittances for MSP claims in the same connection as sending WCB reports

