

Upgraded Visits Manager

Available from Platinum version 9.5.27

If you are already using the Visits Manager and you only need to manage one Visits Manager per patient there is no change

You can now manage multiple **Visits Manager** for the same patient. This new feature will be very useful if you have to manage visits separately for different categories of services (packages): chiropractic, traction, decompression, massage therapy, etc. You can be notified by a **Front Desk message** when the patient reaches the limit of visits/treatments/therapies or the allowed amount in any of the packages.

One visit/procedure per day can be added in each **Visits Manager** but all charges are included. So if the patient has two massage therapies today, only one therapy is added to the visits counter but the charge of both therapies is included.

The visits counter at the **Front Desk** screen will still add only one visit per day no matter how many **Visits Manager** you have configured for the patient. So if the patient has one chiropractic adjustment, two massage therapies and one traction today, only one visit is added to the counter visits at the **Front Desk** but one visit/therapy in each **Visits Manager**.

Finally, only one **financial care plan** per patient can still be managed by Platinum. It should continue to be used to manage the financial aspect of care plans so to include the total amount to be charged to the patient for all services, the amount paid to date toward the care plan, etc. The **Visits Manager** should be used as visits management tool specific to each type of service.

Update Platinum to version 9.5.27 (or more recent version)

Update your Platinum System to version 9.5.27 (or more recent version) with **PsAutoUpdate**. If you need assistance, contact our Solution Center at 1-888-880-8602 or send an email to solution@platinumsystem.com

Configure your services

You must attach the services to be counted in the **Visits Manager** to your different group of services or packages. The same configuration is used for all patients and for all doctors. It is not customizable. Each group of services or package will be identified by one letter or one number. No symbol accepted.

- E.g.: **X** for Chiropractic
T for Traction
D for Decompression
M for Massage
 Etc.

This letter or number must be entered in the field **V** in your **services list**:

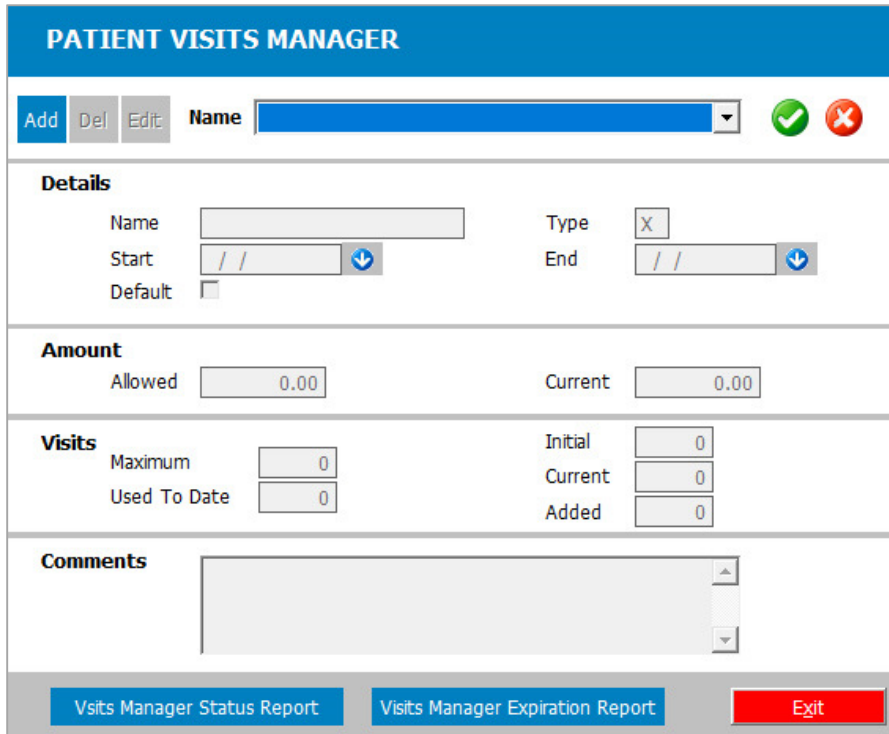
1. At the **Front Desk** screen, right click on the button **≡ Ajt. Trans;**
2. Press **ESC** to select All Professionals;
3. For each service included in the package, enter the letter or number associated with the package in the field **V**:

Order	Prof	Services	Code	Charge	On Receipt or Statement	V	P	I
1		PREVIOUS SYSTEM	#	0.00	PREVIOUS SYSTEM			
2		SAVING/DISCOUNT	#	0.00	SAVINGS / DISCOUNT			
3		WRITE OFF	#	0.00	WRITE OFF			
5		PAYMENT	#	0.00	PAYMENT			
6		PAYMENT PLAN	#	0.00	PAYMENT PLAN			K
7		ADJUSTMENT 1-2	98940	40.00	CHIROPRACTIC ADJUSTMENT	X		K
8		ADJUSTMENT 3-4	98941	70.00	CHIROPRACTIC ADJUSTMENT	X		K
9		MECH TRACTION	97012	45.00	MECHANICAL TRACTION THERAPY	T		K
10		WOBBLE BOARD	97110	55.00	THERAPEUTIC EXCERCISE	T		K
11		DECOMPRESSION	S9090	50.00	VERTEBRAL AXIAL DECOMPRESSION	D		
12		MASSAGE	97124	50.00	MASSAGE THERAPY	M		

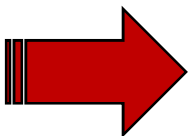
By default, we will use the letter **X** for the chiropractic package. So if you want to continue using only one **Visits Manager** per patient, you have no configuration change to perform as the letter **X** is already in field **V** for all services that count for a visit.

Add a new Visits Manager

1. Select the patient with [P Search](#)
2. Click on the button **VISITS MANAGER**. This form will open:




3. Click on **Add** to add a new **Visits Manager**;
4. In the **Details** section, enter a **Name** for the **Visits Manager** (e.g. Chiropractic 2018, Decompression, etc.);
5. Enter the letter assigned to the group of services or package in the field **Type** (e.g. X for chiropractic, D for Decompression, M for Massage, etc.). By default, **X** will show so if you are already using the **Visits Manager** and you only need to manage one **Visits Manager** per patient you can just leave it as is and not to worry with this value;



All existing **Visits Managers** created with earlier versions of Platinum will be automatically associated to the **Type X** by the update so you have no configuration change to perform.

6. Enter the **Start** date to calculate visits/therapies;
7. Enter the **End** date (deadline) to use the visits/therapies;
8. In section **Amount**, enter the **Allowed** amount (facultative);

9. In section **Visits**, enter the **Maximum** number of visits/therapies included in the package;
10. If applicable, enter the number of **Initial** visits. It is the visits/therapies used before the start date and to be included in this **Visits Manager**;
11. Add/Edit the **Comments**. It is common to all **Visits Manager**;
12. Click on the green check mark  to save. As long as the modification has not been saved, you can click on the red X to undo the changes.
13. Click on **Exit**

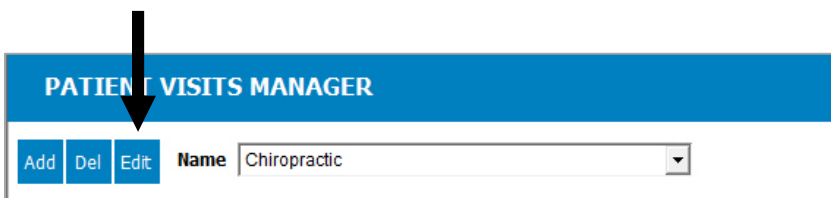
Note that two fields have been removed from earlier versions of the **Visits Manager**:

- **Prior authorization number (Box 23) of patient** as the information is already in the insurance policy (click on **Insur.** then click on **HCFA 1500** tab)
- **EHR Special Note**

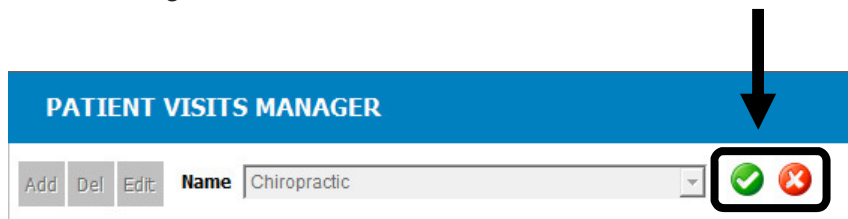
Edit the Visits Manager's information

You can update **Visits Manager**'s information at any time.

1. Click on the **Edit** button

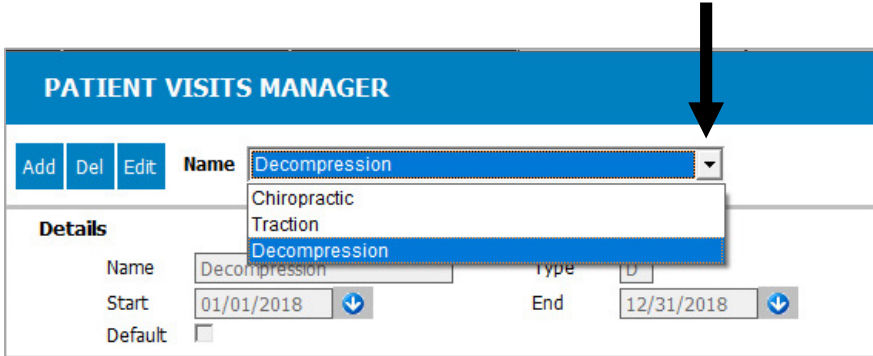


2. Make all necessary changes.
3. Click on the green check mark to save or the red X to undo



Select a Visits Manager among the list of active ones

To view **Visits Manager**' statistics or update its content, you must select it first. You can select a **Visits Manager** by clicking on the button **VISITS MANAGER** at the **Front Desk** or **EHR** screen then on the drop down arrow of the field **Name**:

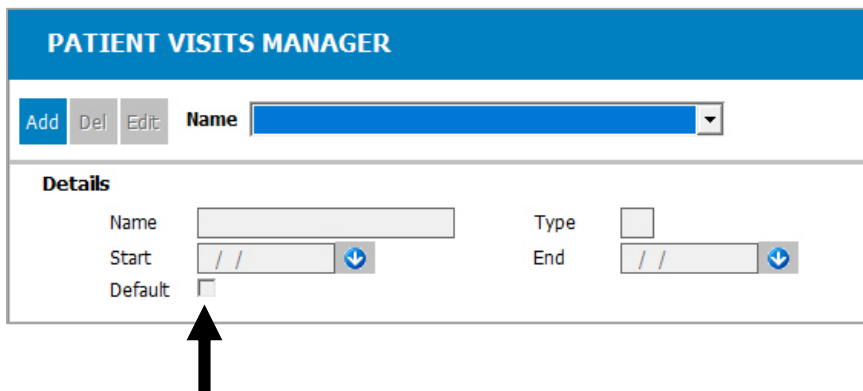


The screenshot shows the 'PATIENT VISITS MANAGER' interface. At the top, there are buttons for 'Add', 'Del', and 'Edit'. Below these is a 'Name' field with a dropdown arrow. A dropdown menu is open, showing a list of options: 'Decompression', 'Chiropractic', 'Traction', and 'Decompression'. A black arrow points to the dropdown arrow of the 'Name' field. Below the dropdown is a 'Details' section with fields for 'Name', 'Type', 'Start', 'End', and 'Default'. The 'Name' field contains 'Decompression', 'Type' contains 'D', 'Start' is '01/01/2018', 'End' is '12/31/2018', and 'Default' is an unchecked checkbox.

Default Visits Manager

The status of a single **Visits Manager** is displayed on the **Front Desk** and **EHR** screens. It is also the one that opens when you click on the button **VISITS MANAGER** at the **Front Desk** and **EHR** screens. It is therefore important to choose what will be your **default Visits Manager** depending on which package should finish the fastest or require more management.

The existing **Visits Manager** at the time of the update is installed or the very first one created for a patient will automatically be set as the default **Visits Manager**. To select another default one, you must select it first then check the box **Default**.



The screenshot shows the 'PATIENT VISITS MANAGER' interface. At the top, there are buttons for 'Add', 'Del', and 'Edit'. Below these is a 'Name' field with a dropdown arrow. Below the dropdown is a 'Details' section with fields for 'Name', 'Type', 'Start', 'End', and 'Default'. The 'Name' field is empty, 'Type' is empty, 'Start' is '//' and 'End' is '//'. The 'Default' checkbox is checked. A black arrow points to the 'Default' checkbox.

Status of the Default Visit Manager

The color of the **Visits Manager** on the **Front Desk** and **E.H.R.** screens indicate the status of the default **Visits Manager**:

- The color Green indicates that the **Visits Manager** is active.

VISIT MANAGER		3	STOP MANAGER	
Date	P	Service	M	Charge
07/04/2018	1	MESSAGE	\$	50.0

- The color Yellow indicates that the **Visits Manager** will expire soon: in less than 10 days, 1 or 2 visits or \$100.

VISIT MANAGER		3	STOP MANAGER	
Date	P	Service	M	Charge
07/04/2018	1	MESSAGE	\$	50.0

- The color Red indicates that the **Visits Manager** is expired. The end date, the total number of visits or the dollar amount has been reached.

VISIT MANAGER		3	STOP MANAGER	
Date	P	Service	M	Charge
07/04/2018	1	MESSAGE	\$	50.0

Visits Manager Statistics

Two statistics are continuously updated:

- **Current** amount billed to date which is the total amount of charge including the insurance portion for USA.


Amount		Allowed	<input type="text" value="1000.00"/>	Current	<input type="text" value="730.00"/>	
Visits		Maximum	<input type="text" value="10"/>	Initial	<input type="text" value="0"/>	
	Used To Date	<input type="text" value="4"/>	Current	<input type="text" value="4"/>	Added	<input type="text" value="0"/>

- **Used to date** which is the total of **Initial**, **Current** and **Added** visits

Add non-calculated visits

Only one visit per day is added to the visits meter. However, if the patient shows up twice the same day, you can manually add more visits by updating the field **Added**.

Amount		Allowed	<input type="text" value="1000.00"/>	Current	<input type="text" value="730.00"/>
Visits		Maximum	<input type="text" value="10"/>	Initial	<input type="text" value="0"/>
		Used To Date	<input type="text" value="4"/>	Current	<input type="text" value="4"/>
				Added	<input type="text" value="0"/>



Reports

Two reports are available:

- **Visits Manager Status Report**: list of all **Visits Manager** with their status (green, yellow or red)
- **Visits Manager Expiration Report**: List of **Visits Manager** that have expired

To generate a report, simply click on the related button:

PATIENT VISITS MANAGER

Add Del Edit Name

Details

Name Type
Start End
Default

Amount

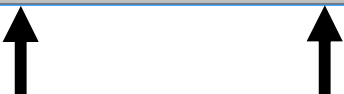
Allowed Current

Visits

Maximum Initial
Used To Date Current
Added

Comments

Visits Manager Status ReportVisits Manager Expiration ReportExit



Front Desk Message and Stop at Front Desk

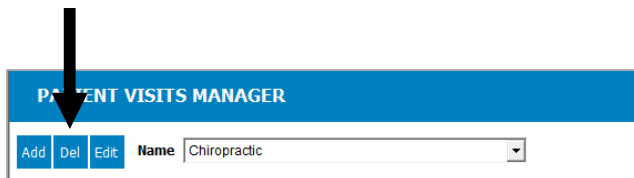
If configured, a **Front Desk message** can be sent when a **Visits Manager** has expired (it does not matter if it is the total number of visits, \$ amount or end date). You can also stop the patient when he signs in.

1. Click on **Utilities**
2. Click on **Q) CONFIGURATION FORM**
3. Click on the tab **Other**
4. **Option 5**, check on the appropriate option(s)

What to do when a Visits Manager has expired

Once a **Visits Manager** has expired, to avoid receiving **Front Desk messages** each time patient is coming, we suggest to delete all expired **Visits Manager**:

1. Click on the button **VISITS MANAGER** at the Front Desk or EHR screen
2. Select the **Visit Manager**
3. Click on the **Del** button



Let's look at the following scenario

The patient is billed today \$70 for 1 chiropractic adjustment, \$50 for 1 decompression and \$75 for 1 massage.

He has 3 **Visits Manager** and all services are included in the **Financial Care Plan**.

Date	P	Service	M	Charge	Payment	I
07/06/2018	1	MASSAGE	\$	75.00	0.00	
07/06/2018	1	DECOMPRESSION	\$	50.00	0.00	
07/06/2018	1	ADJUSTMENT 3-4	\$	70.00	0.00	

1 visit is added in each Visit Meter and also the related charge: \$70 in the Chiropractic VM, \$50 in the Decompression VM and \$75 in the Massage VM.

Add Del Edit Name **Chiropractic**

Details
 Name: Chiropractic Type: X
 Start: 07/01/2018 End: 12/31/2018
 Default:

Amount
 Allowed: 350.00 Current: 70.00

Visits
 Maximum: 5 Initial: 0
 Used To Date: 1 Current: 1
 Added: 0

Only 1 visit is added to the Front Desk Visits Meter and Financial Care Plan Visits Meter

Add Del Edit Name **Decompression**

Details
 Name: Decompression Type: D
 Start: 01/01/2018 End: 12/31/2018
 Default:

Amount
 Allowed: 250.00 Current: 50.00

Visits
 Maximum: 5 Initial: 0
 Used To Date: 1 Current: 1
 Added: 0

DOB:	05/12/1934	84 yrs
1st vis.:	02/13/2018	1
StatAcc.:	/ /	
Tax rec.:	02/11/2018	
Last vis.:	07/06/2018	
Plan Start:	01/01/2018	1
Plan End:	12/31/2018	0.00
B:750.00	750.00	C: 195.00

The total amount billed is added to the Financial Care Plan Visits Meter
 (\$70+\$50+\$75=\$195)

Add Del Edit Name **Massage**

Details
 Name: Massage Type: M
 Start: 01/01/2018 End: 12/31/2018
 Default:

Amount
 Allowed: 150.00 Current: 75.00

Visits
 Maximum: 2 Initial: 0
 Used To Date: 1 Current: 1
 Added: 0