Prenatal Diagnosis Centers: Unique Actions Course

Slide 1 - Welcome

Slide notes: Welcome to the Prenatal Diagnosis Centers: Unique Actions course.

Click the Begin Course button or press Enter on the keyboard to start.

Slide 2 - Course Navigation

Slide notes: You can use the following buttons in the player to navigate this course.

- Click the Rewind button to replay the course
- Click the Pause/Play button to pause the slide or to play the paused slide.
- Click the Back button to return to the previous slide.
- Click the Forward button at the end of each slide to move on to the next slide.
- Click the Mute button to mute the audio and then turn it back on, if required.
- Click the Closed Captioning button to view closed captions of the narrative audio.
- Click the Exit button to exit from the course.

You can also view completion status of the topics in the Table of Contents.

Please note at the end of each lesson, there will be a knowledge check to be completed before advancing to the next lesson.

Slide 3 - Course Introduction

Slide notes: The Prenatal Diagnosis Centre: Unique Actions course will introduce you to the process for viewing and submitting Patient Service Reports (PSRs), and the Invoicing and Billing process.

Slide 4 - Learning Objectives

Slide notes: On completion of this course, you will be able to:

- Navigate to and view PSR records and list views, and enter and submit PSRs.
- Understand invoice generation, view and print PDC invoices to verify accuracy, and view payments.

Slide 5 - Lesson Objectives

Slide notes: Welcome to the PSRs lesson of this course.

At the end of the lesson, you will be able to navigate to and view PSR records and list views, and enter and submit PSRs.

Slide 6 - Introduction to Patient Service Report (PSR)

Slide notes: A PSR is the principal record for information concerning a patient's services as administered by the PNS program. Some key features of PSRs are:

- PSRs are no longer manually created. In SIS 2.0, when an appointment status of an appointment record is changed to Kept, with a Yes to the last question, then a PSR will automatically be created in the Draft status.
- If the PDC user needs to enter any services on the PSR as provided but is unable to do so due to a lack of a provided appointment status for them after a PSR is created and it is not yet in Invoiced status, the services will need to be added to an appointment record, and the PSR will be updated. If a PSR is in the Submitted status and an additional appointment is kept with additional services marked as Provided, the PSR goes back to the Draft status.
- SIS 2.0 supports multiple PSRs for a patient. If a PSR is invoiced, no edits or updates can be made. A new PSR would be created for the newly requested services.

Slide 7 - PSR List Views

Slide notes: List views are pages that display records in a list format. These views enable you to find, organize, and access records in SIS 2.0. There are three types of List Views available for PSRs:

1. Draft - PSRs List View: This is the default view that displays all PSRs in Draft status (pending submission to GDSP) for all the PDCs. These are still editable.
2. Invoiced - PSRs - Last 90 Days List View: This view displays all PSRs from all PDCs that have been invoiced in the last 90 days. These are no longer editable.
3. Submitted - PSRs List View: This view displays all PSRs for all PDCs that are in the Submitted status. These PSR records are not editable by PDC users.

Slide 8 - Navigating to PSR List Views: Walkthrough

Slide notes: Perform the following steps to view a PSR record:

1. Select PSRs from the Left Navigation menu. You will land on the Draft - PSRs as a default List View.
2. Click the down arrow next to the List View title.
3. You can select Submitted - PSRs or Invoiced - PSRs - Last 90 Days from the dropdown to view the specific List View.
4. Click on a PSR ID to view that PSR.

You may also enter the PSR ID in the Global Search field. Click the PSR ID Record result to navigate to the related PSR.

Slide 9 - PSR Record – PSR Details Tab

Slide notes: When you select a PSR ID, you will land on the PSR's Details tab. A PSR has the following items to view:

• PSR Details
• Patient Details
• Specimen
• Services
• Pregnancy Status by Fetus
• Subsequent Information Acquired after Initial PDC Visit (by fetus)
• Hard or Soft Inconsistencies, only if present

Slide 10 - Filling Out PSR Record

Slide notes: You can fill out service records from the PSR. Each PSR could have up to all of the 15 unique service records available in the Authorized Services Section and could have a service record for a given type of service more than once. Repeat services will have different service record ID numbers. Perform the following steps to verify service records from the PSR:

1. Click the Service ID to navigate to the respective service record to view. Each service record has fields unique to that service or test.
2. You will have the ability to edit the service record until the parent PSR is invoiced.

Slide 11 - Editing a PSR Service Record

Slide notes: Perform the following steps to edit a service record linked to a PSR.

1. Click the related Service ID to navigate to the service record.
2. The PSR Status field can be edited from each linked service record access by clicking the Service ID.
3. After editing this field, click Save on the service record to save any changes.

Please Note:

• A PSR in the Submitted status will be displayed in the Submitted - PSRs list view.
• A GDSP user could place a Submitted PSR back into Draft status after review which would then require you to make any necessary edits on that PSR and re-submit.

Slide 12 - PSR Submission for Approval and Invoicing – Submitting a Service Record: Demonstration

Slide notes: Perform the following steps to submit a PSR:

1. Click the required PSR from the PSR ID field. You will be navigated to the respective PSR record.
2. Review the PSR for accuracy.
3. If necessary, select the unlocked, required field(s) to edit on the PSR record or service records.
4. Click Save to save the updates.
5. Click the Submit button at the top of the record to submit.
6. Review any PSR inconsistencies that will appear. You cannot submit the PSR to GDSP until all hard inconsistencies are resolved
7. A warning message will be display asking for permission to submit a PSR with soft inconsistencies. Click Yes to submit the PSR or select No to correct the information on the PSR.

Upon submission, the PSR status will change from Draft to Submitted.

Slide 13 - Knowledge Check

Slide notes: You have successfully completed this lesson. Let us check your knowledge with a quick quiz.

When is a PSR created?

Select the correct option.

Slide 14 - Lesson Objectives

Slide notes: Welcome to the Invoices lesson of this course.

At the end of the lesson, you will be able to understand invoice generation, view and print PDC invoices to verify accuracy, and view payments.

Slide 15 - Introduction to Invoicing

Slide notes: Invoicing occurs between GDSP and PDCs.

- PSRs that are placed in the Submitted status by GDSP will be available for invoicing.
- Billing occurs monthly on the last calendar date of the month, even on holidays.
- All PSRs, including Reverse Payment PSRs, in the Submitted status at the end of the month will be processed by the system and updated to Invoiced status.

Slide 16 - All Invoices (Last 36 Months) List View

Slide notes: The Invoices page can be accessed from the Left Navigation menu. The All Invoices (Last 36 Months) List View is the only invoice list view and displays all invoices created in the previous 36 months in descending order by invoice date.

You can tailor the view of your columns by adjusting the data using any of the three features to sort, filter, or export the columns based on the action you need to perform. The default arrangement of the columns is shown on the screen.

Slide 17 - All Invoices (Last 36 Months) List View (Cont'd)

Slide notes:

- Invoice # - the unique number assigned to the invoice when generated
- System Generated Invoice Date - the date of generation in descending order by default
- PDC Site - The site where the services were administered
- Date PDC Created Invoice PDF - the first date the invoice was downloaded for printing

Slide 18 - All Invoices (Last 36 Months) List View (Cont'd)

Slide notes:

- Date PDC Submitted Invoice
- Voucher #
- Voucher Issued Date - the date the voucher was applied
- Warrant # - the number of the check issued to reconcile the invoice
- Warrant Issued Date - the date of check issue

Slide 19 - Invoice Record

Slide notes: An invoice record can be viewed by clicking the desired Invoice Number that is hyperlinked from the Invoice# column on the Invoice list view.

An invoice record has the following sections:

- Invoice Details: This section details the selected invoice and displays the creation and submission dates, the warrant and voucher numbers, and the warrant and voucher issue dates of the invoice.
- PDC Invoiced PSRs: This section displays the PSRs, and all services invoiced by the PDC. An Admin Fee will automatically be added per Comprehensive PDC per Case if there is at least one service which has been provided to the patient.
- Notes: This section allows you to enter specific notes related to the invoice and includes a timeline to view previous actions related to it.

Slide 20 - Invoice Record (Cont'd)

Slide notes: The following fields are automatically populated by SIS and are locked in the record:

- PDC Site
- System Generated Invoice Date
- Date PDC Created Invoice PDF
- Voucher #

Slide 21 - Invoice Record (Cont'd)

Slide notes

- Voucher Issue Date
- Warrant #
- Warrant Issue Date

Locked fields are denoted by the Lock icon next to the field.

Slide 22 - Update PDC Submission Date

Slide notes: You can update the Date PDC Submitted Invoice field to the appropriate date following these conditions:

- The date cannot be entered until the Date PDC Created Invoice PDF has a date and should be after the Date PDC Created Invoice PDF.
- This date must be entered before GDSP users can enter the Date GDSP Submitted Invoice.

Slide 23 - Update PDC Submission Date: Walkthrough

Slide notes: If a PDC needs to resubmit an invoice, follow the given steps to update the PDC submission date for that invoice:

1. Navigate to the Invoice Details section of the invoice record.
2. Click the Calendar icon on the Date PDC Submitted Invoice field.
3. Select the updated date and click the Save & Close button from the ribbon.

Slide 24 - Download and View PDF Invoice in SIS: Walkthrough

Slide notes: You will need to download and view invoices as a PDF document. Follow these steps to accomplish:

1. Navigate to the required Invoice record.
2. Click the Create Invoice PDF button on the ribbon of the Invoice Summary screen.

At this time, the following will occur:

- The Invoice PDF will be attached to the Timeline in the Notes section.
- SIS will take the current date and fill the Date PDC Created Invoice PDF, only on the first use of this button, if created by a PDC user.
- An audit log under the related tab for the Invoice Summary screen will capture the user and the time when you clicked the Create Invoice PDF button, if this was the first time you clicked it.

Slide 25 - Download and View PDF Invoice in SIS: Walkthrough (Cont'd)

Slide notes

3. Navigate to the Notes section and download the attachment from the Timeline to view and print as needed.

Slide 26 - Addendum Invoices

Slide notes: In certain cases, you will work with addendum invoices, which are invoices that have services provided on a PSR in a previous fiscal year. To view addendum invoices on the Invoice Summary screen, first navigate to the required PSR record:

- If a PSR is in Submitted status and the services on the PSR have Service Provided Dates in two different fiscal years, then SIS will create two separate invoices for each fiscal year for that PDC for that PSR.
- The services that were provided in the prior fiscal year should appear on one invoice, which is the addendum invoice. The invoice number should be incremental after 12.
- For example, if the invoice was the first such invoice generated, then the invoice record number will be: ##-####13. If it was the second such invoice generated, then the invoice record number will be: ##-####14 and so on.
- The services that were provided in the new fiscal year will appear on a second invoice. The invoice number sequence and the last two digits of the invoice record number should be aligned with the month that it was generated in for that PDC.

Slide 27 - Knowledge Check

Slide notes: You have successfully completed this lesson. Let us check your knowledge with a quick quiz.

Invoices can be created by:

Complete the sentence by selecting a correct option.

Slide 28 - Course Summary

Slide notes: Let's summarize. Here are the key takeaways of this course.

Slide 29 – Thank You.

Slide notes: You have completed this course. Press the Exit button to leave the course.