

## Systems Parameter Maintenance

The system parameters maintenance menu allows change for some information about the office clinic.

**Caution: Changing information on this tab may affect the Clinic Pro Registration. Because of such, if any of the clinic info needs to be changed, please call support at (517)351-1021 before making changes to the address, name, or tax ID.**

The screenshot shows a Windows-style dialog box titled "System Parameters:1" with three tabs: "Clinic Info", "System Settings", and "Templates". The "Clinic Info" tab is active and contains the following fields:

Clinic Name	CLIIICPRO SUPPORT	Clinic Tax ID	123458798
Address...	123 PLEASANT STREET MORGANTOWN, WV 48823	Blue Shield Submitter ID	
Office Phone	(304) 262-2298	Medicare Submitter ID	
Contact Person	DR MORGAN SWIFT	Medicaid Submitter ID	
Transactions Facility Default	CLIIICPRO SUPPORT	Login ID	
		Biller Location Code	
		EDIUSA No.	EDIUSA#

At the bottom of the dialog box are "OK" and "Cancel" buttons.

**Clinic Name:** The name the office's billing entity is registered under. This information prints on box 33 on the HCFA.

**Address:** The address of your clinic. This information prints on box 33 on the HCFA.

**Office Phone:** The primary contact phone number for the office. This is printed on box 33 on the HCFA and transmitted electronically.

**Contact Person:** The person to contact for EDI billing inquiries, this is transmitted electronically in loop 1000A and is required to be filled in.

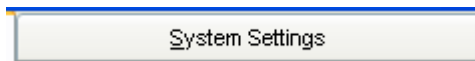
**Transactions Facility Default:** Any Facility or Hospital will be automatically added to transactions classified as Inpatient or Outpatient hospital.

**Clinic Tax ID:** Enter the Tax ID for the business, or if a sole provider with no business tax ID, enter the doctor's Tax ID.

**Billor Location Code:** In Michigan, this is the "c0xxx" number assigned to the client's office by BCBSM EDI. Enter that information here; all other states may leave this blank.

**BS, MCR, MCD Submitter ID, Login ID, EDIUSA No:** These fields are required by some electronic clearinghouses. Refer to the billing trainer at ClinicPro Support if further assistance is needed with these fields.

The next Tab is "Systems Settings"

A screenshot of a software dialog box titled "System Parameters: 1". The dialog has three tabs: "Clinic Info", "System Settings" (which is selected), and "Templates". The "System Settings" tab contains several sections:

- Patient Numbers:** A checked checkbox for "System Generated" and a text field for "Next Patient Number" containing "78".
- CMS 1500:** Radio buttons for "Return Address Alignment" (Left, Right) and "Mode" (Test, Live). "Right" and "Live" are selected.
- Transaction Card:** A checked checkbox for "Display Primary Insurance Carrier Note", a text field for "Tax Rate" containing "6.00%", and three spinner boxes for "Delinquent Account Bins (Days)" with values "30", "60", and "90".
- Payment Screen:** Radio buttons for "Patient Display" (Patient No. & Name, Patient Name, Control ID & Name). "Patient No. & Name" is selected.
- Settings:** A text field for "Phone Number Mask" containing "(999) 999-9999", "Date Format" radio buttons (MDY, DMY, YMD) with "MDY" selected, "Decimal Separator" radio buttons (Comma, Period) with "Period" selected, and "On exit from fields" checkboxes for "Confirm" and "Beep".
- Diagnosis Codes:** A checked checkbox for "Check all Diagnosis indicators by default".

At the bottom of the dialog are "OK" and "Cancel" buttons.

The system settings tab allows changes with miscellaneous information within various ClinicPro screens.

**Patient Numbers**

If System Generated is **checked**, every time a new patient is added, ClinicPro will automatically assign a new patient number to the patient. The next number to be assigned is shown. To edit the next number to be assigned, click on the number (78 in the above picture) and type in the next number desired. If System Generated is **unchecked**, when adding a new patient the user will be prompted to enter in a unique patient number for them.

**CMS 1500 Return Address Alignment**

Changing this will cause the Insurance Company's address to be aligned either to the left or the right of the page. Most standard HCFA CMS-1500 forms are printed such that there is an open space on the **Right**. When using a Custom HCFA Form this must be set to "Right."

**Billing Mode**

**Test** will flag the billing file generated as a Test file, and will not be actively processed. Many clearinghouses require sending a Test file prior to being enrolled with them; reference the Billing Trainer for more information if testing. Choosing **Live** will produce a real billing file that can be processed by payers.

**Display Primary Insurance Carrier Note**

When checked, this will enable the feature in Clinic Pro to popup a note when accessing the transaction card. The note will contain the text placed in the **Notes** button on the Insurance & Dates screen, as well as any notes input under the Patient's Detail Screen. This is useful for flashing up co pay information or similar reminders.

**Tax Rate**

The amount of tax that will be applied to Taxable Items in the system.

**Delinquent Account Bins**

These spinner controls allow a user to define the columns on an accounts receivable report. For the most part, Clinic Pro suggests that controls are set to 30, 60, and 90 days. This is the most common aging format used by accountants. However, these controls may be set to whatever periods of time are useful for the clinic.

**Payment Screen; Patient Display**

Allows the user to define how to display patients' charges in the Payment screen while posting a payment. There is an option to show just the Patient's name, or include their Patient number or Control ID (Defined by Clinic Pro) on the screen as well.

**Phone Number Mask**

This allows a Clinic Pro user to set up phone number input that matches the phone number configuration of their country. To indicate that the field should be filled with numbers, use "9". (Example: +123-456-7890 style of formatting can be achieved by entering +999-999-9999). U.S. and Canadian users need not change this field.

**Date Format & Decimal Separators**

This field changes how the date is shown in Month-Day-Year form, and changes any decimal in the program to a period or a comma. U.S. and Canadian users need not change this field.

**On Exit from Fields Confirm/Beep**

If checked, when inputting information into Clinic Pro, a warning will occur when moving to another field on the screen. **Confirm** will produce a popup window asking to continue or go back, **Beep** will produce a small beep on the computer whenever exiting a field. (Example: When adding a new patient's name, this warning will go off when going between the Last name field and First name field, as well as any other fields edited.)

## The final Tab is “Templates”

Templates

In the Templates section of the system settings, a user can pre-set the print parameters of four important reports: Daily Appointment Book (see below), Fee Slips (see below), Receipts, and Patient Statements. Check the boxes that desired to print on each of the reports. A brief custom global message can print on receipts and patient statements.

**System Parameters:1**

Clinic Info      System Settings      Templates

**Appointment Schedule**

Patient Name     Number     Home Phone     Work Phone     SSII     DOB     CPT

Primary Insurance     Room     Reason     Duration     Comment     Reminder

**Fee Slips**

Patient Name     Number     Home Phone     Work Phone     SSII     DOB     Address     Sex

Primary Doctor     Referring Doctor     Appointment Date     Time     Room     Reason     Comment

Primary Insurance     Policy Number     Group Number     Coverage

Secondary Insurance     Policy Number     Group Number     Coverage

Responsible Party     Patient Balance     Insurance Balance     Dx

Visits Allowed / Remaining     Visits Authorized

**Patient Receipts**

Insurance Balance     Dx     SSII     DOB     Message: We appreciate the confidence you have show

**Patient Statement**

Insurance Balance     Message:

OK    Cancel

By using the Templates section, a custom message can be created to accompany the receipts and statements and can be changed as often as desired. This is useful for wishing patients a Happy Holidays during December, as just one example.

The Appointment Schedule and Fee Slips options here are for ClinicPro users still utilizing the appointment calendar from version 2.3 or before (accessed from Activities: Appointment Calendar). Newer users should disregard these fields.