

Instructional Manual

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Instructional Manual

Lesson Title: *Web-Based Training (WBT): Navigation & Documentation*

Lesson Goal: This lesson of instruction provides the knowledge and application for Patient Account Representatives (PARs) of the hospital to successfully navigate through and accurately document patient and insurance account revisions while utilizing the *McKesson* (STAR) operating system.

Lesson Objectives:

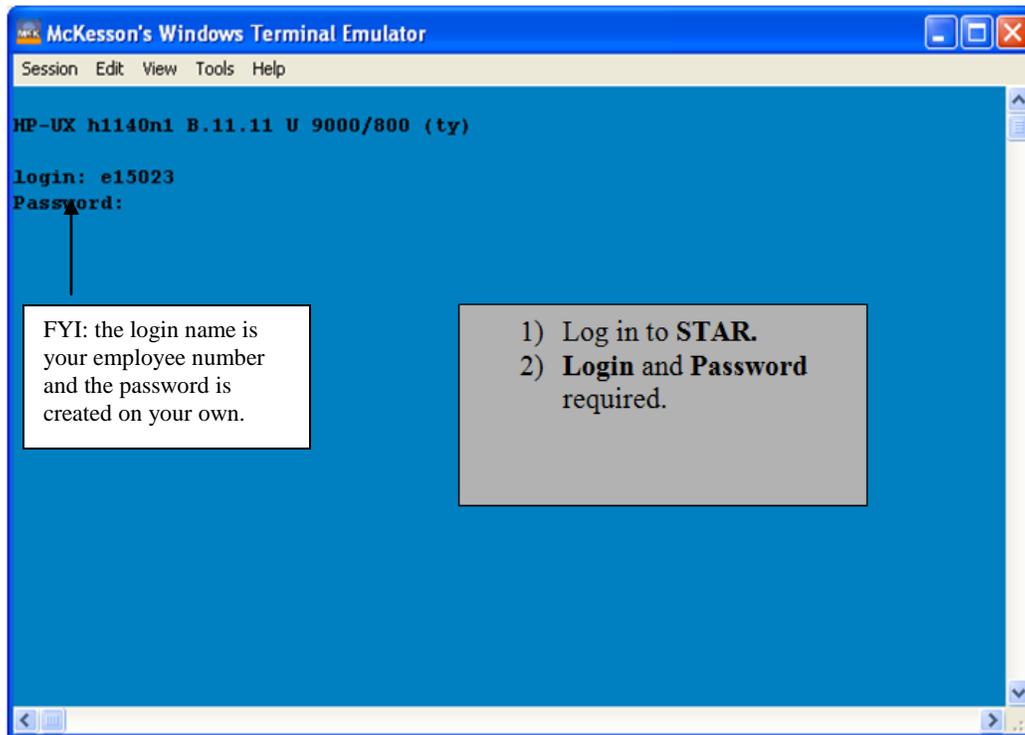
Given a computer training workstation, operating system, and lesson publications, Patient Account Representatives (PARs) will determine proper navigation procedures in the *McKesson* (STAR) system without error.

Given a computer workstation, operating system, and lesson publications, Patient Account Representatives (PARs) will be able to document and track changes to individual patient accounts with 100% accuracy.

*Step-By-Step Instructions in
Navigation Procedures: McKesson (STAR) system*

Overview: This lesson portion will guide each Patient Accounts Representative (PAR) to their designated area within the *McKesson (STAR)* system.

Log In Procedures



Included in the *STAR Navigator* page are two tab functions that the Patient Accounts Representatives will use as part of their job duties. These are the *Billing Function* and *Workstation* tabs.

*** (Steps in learning how to perform tasks for other option areas will be covered in future lessons.)***

NOTE:
 The *Workstation* Tab
 is applied to make Insurance Changes
 such as *Deleting, Adding, or*
Modifying a Patient's Personal
 Information or current Insurance Plan.

NOTE:
 The *Billing Function* Tab
 is used mainly for Account Information
 Inquiries and Claims Management such adding a
 claim and/or making changes to an existing claim.

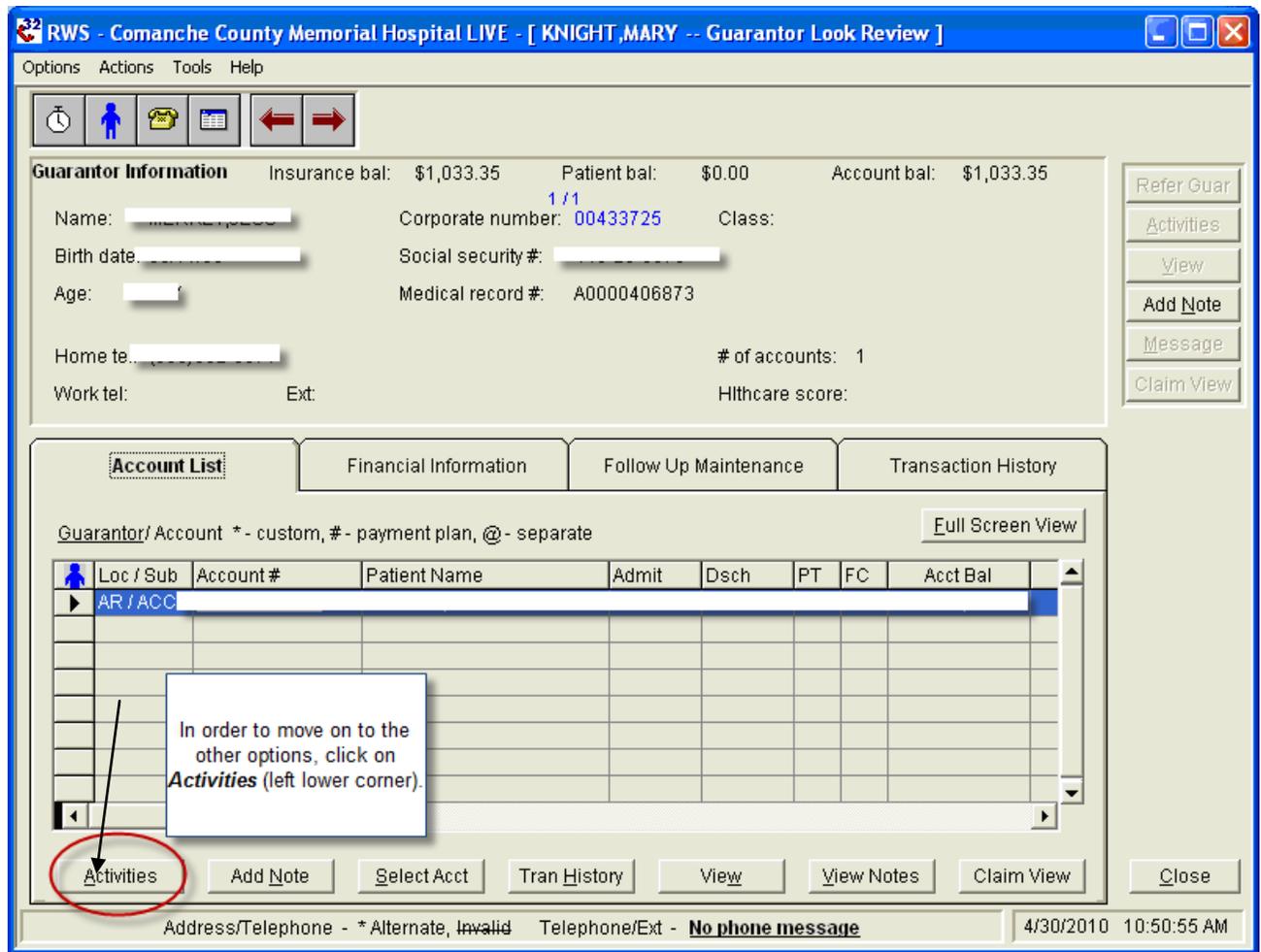
Workstation Tab

The screenshot shows the STAR Navigator - BUSINESS OFFICE interface. At the top, there is a menu bar with 'Options', 'View', 'Tools', and 'Help'. Below the menu bar is a toolbar with icons for 'DEPT', 'GO TO', 'TOOLS', 'TOP 10', 'USER', 'HELP', 'NEW', and 'EXIT'. The main area displays 'Department View' with dropdown menus for 'Facility: Comanche County Memorial Hospital' and 'Department: BUSINESS OFFICE'. A central area contains several tabs: 'Charge/Credit I', 'ERA Worklists a', 'Bad Debt Manage', 'Elec RA Interfa', 'Workstation', 'Cash Posting', 'Billing Functio', and 'Financial Sys C'. The 'Workstation' tab is highlighted with a green oval, and a tooltip points to it with the text: 'The **Workstation** tab has one option under it. This is called the *Receivables Workstation*. This is where patient claims representatives can make revisions to individual accounts, modify insurance information and do balance transfers. To go into *Receivable Workstation*, just click on the tab once.' Another tooltip points to the 'Top Ten' section on the right, stating: 'This function states the current time and day each time you are logged on.' The bottom right corner shows the date and time: '30-Apr-10 10:49 AM'.

It will then take you to the next screen....

See next page!

Patient Account Representatives (PARs) need to get to the *Activities* tab to perform their tasks.



Guarantor Information Insurance bal: \$1,033.35 Patient bal: \$0.00 Account bal: \$1,033.35

Name: _____ Corporate number: 00433725 Class: _____
 Birth date: _____ Social security #: _____
 Age: _____ Medical record #: A0000406873

Home tel: _____ # of accounts: 1
 Work tel: _____ Ext: _____ Hlthcare score: _____

Account List Financial Information Follow Up Maintenance Transaction History

Guarantor/ Account *- custom, #- payment plan, @- separate Full Screen View

Loc / Sub	Account #	Patient Name	Admit	Dsch	PT	FC	Acct Bal
AR / ACC							

Activities Add Note Select Acct Tran History View View Notes Claim View Close

Address/Telephone - *Alternate, Invalid Telephone/Ext - No phone message 4/30/2010 10:50:55 AM

This screen pulls up the individual account information (Account Number, name of patient, birthdate, age, admit/discharge date, etc). If you scroll to the right side, it will pull up additional patient information).

Account Activities

- Account Revision
- Insurance Management
- Balance Transfer/Claim Disposition
- Demand Bill
- Demand Follow-Up...
- Guarantor Follow-Up
- Guarantor Page Revision
- Guarantor Summary
- Insurance Follow-Up
- Insurance Revision
- Patient Page Revision
- Refund Processing
- Single Bill Request
- Small Balance Write-off
- Collection Agency Transfer
- PreCollect Status
- Account Transactions
- Denial History

Close

Account List

Loc / Sub	Account #	P
AR / ACCF		M

Acct Bal: \$1,033.35

4/30/2010 10:51:51 AM

30-Apr-10 10:51 AM

McKesson

Account Activities

4/30/2010 10:51:51 AM

The focus areas to guide in navigation are Account Revision and Insurance Management. The remaining tabs are shortcuts from the Billing function.

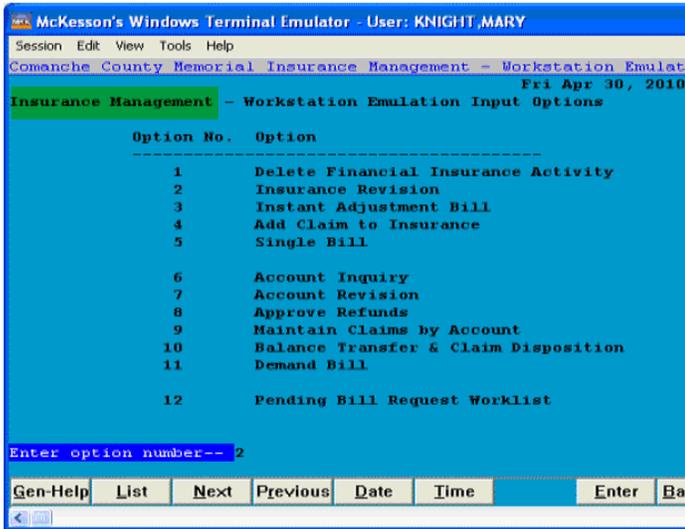
The next page provides visuals of what these two options include within the McKesson (STAR) system.

NOTE: In order to get into Account Revision or Insurance Management option, click on button only once.

To exit, click the Close button once.

See options and example screen shots under the **Insurance Management** and **Account Revision** tabs.

NOTE: Under the **Insurance Management** tab, the following options will appear



Insurance Management option: Each Patient Accounts Representative (PAR) will be using the following choices depending on the task:

- Delete Financial Insurance Activity** [Option 1]: This option is used if a PAR needs to delete an insurance plan.
- Insurance Revision** [Option 2]: This function is used to make modifications to patient's current insurance plan(s) such as relationship status, insurance plan, policy number, insurance and identification number.
- Instant Adjustment Bill** [Option 3]: This function is used after modifications are made to a patient account and an adjustment bill needs to be processed electronically.
- Add Claim to Insurance** [Option 4]: Sometimes an already released claim needs to be reprinted via hardcopy. This option guides you through the steps in order to add a claim in McKesson
- Single Bill** [Option 5]: Not used.
- Account Inquiry** [Option 6]: This option also applies in the Billing Function. This is used as a 'shortcut' to inquire on a patient's demographic information.
- Account Revision** [Option 7]: This option also applies in the Billing Function. This is used as a 'shortcut' to make revisions on a patient's demographic information.
- Approve Refunds** [Option 8]: Option not used by the PARs.
- Maintain Claims by Account** [Option 9]: This option also applies in the Billing Function. This is used as a 'shortcut' to inquire on each insurance coverage the patient has.
- Balance Transfer & Claim Disposition** [Option 10]: This option also applies in the Billing Function. This is used as a 'shortcut' to transfer a balance over to the next insurance. This option is typically used by the biller and not the PAR.
- Demand Bill** [Option 11]: Not used.
- Pending Bill Request Worklist** [Option 12]: Not used.

NOTE: Under the **Account Revision** tab, the following screen will first appear
(see screen shot on next page).

Account Revision - Workstation Emulation Processor
Fri Apr 30, 2010 14:06

Account	Name	FC Typ	Admit	Disch	Balance	Loc	
01	1/P	02/24/10	02/26/10		0.00	AR /ACCF	
1	Total Charges	2	Total Adj	3	Total Payments	4	Ref? Exp? Pat Class
	\$8,461.74		\$2,469.10-		\$5,992.64		No No
5	Ins Liability	6	Ins Adj	7	Ins Payments	8	Agency
	\$0.00		\$2,469.10-		\$5,992.64		
9	Pt Liability	10	Patient Adj	11	Pt Payments	12	Last Pt Payment
	\$0.00		\$0.00		\$0.00		
13	Wkfl	14	Sch	15	Schd Typ	16	Phone
	200		Standard		Y/N/N		No
19	BD Pre-Listed	20	BD Date	21	Agency	22	BD Transfer Amount
23	SSN #	24	Birth Date	25	BillHld	26	DPW/CMS
					No		No/Yes
					No/Yes		Yes /ST
							Yes
30	COB Ins Carrier	#Clm	LCS	SubmitDt	Est Amt Due	Amt Pd	Dsp Date
\$	1 MEDICARE UNIVERSA	1	1	03/23/10	\$8,461.74	\$5,167.64	F 04/07/10
\$	2 MEDICAID UNIVERSA	1	2	04/08/10	\$1,100.00	\$825.00	F 04/29/10

Press NL for Menu, enter code, or '-' for list--

Navigation tabs: Gen-Help, List, Next, Previous, Date, Time, Enter, Back Up, Return

Callout 1 (Left): FVL.....
The Next tab takes you to the next screen in STAR.
The Previous tab takes you to the previous screen in STAR.
GenHelp tab is short for General Help.
List tab is not used.
Date and Time tabs state the current day and time while working in STAR.
Back Up can be used in the same manner as the Return key.

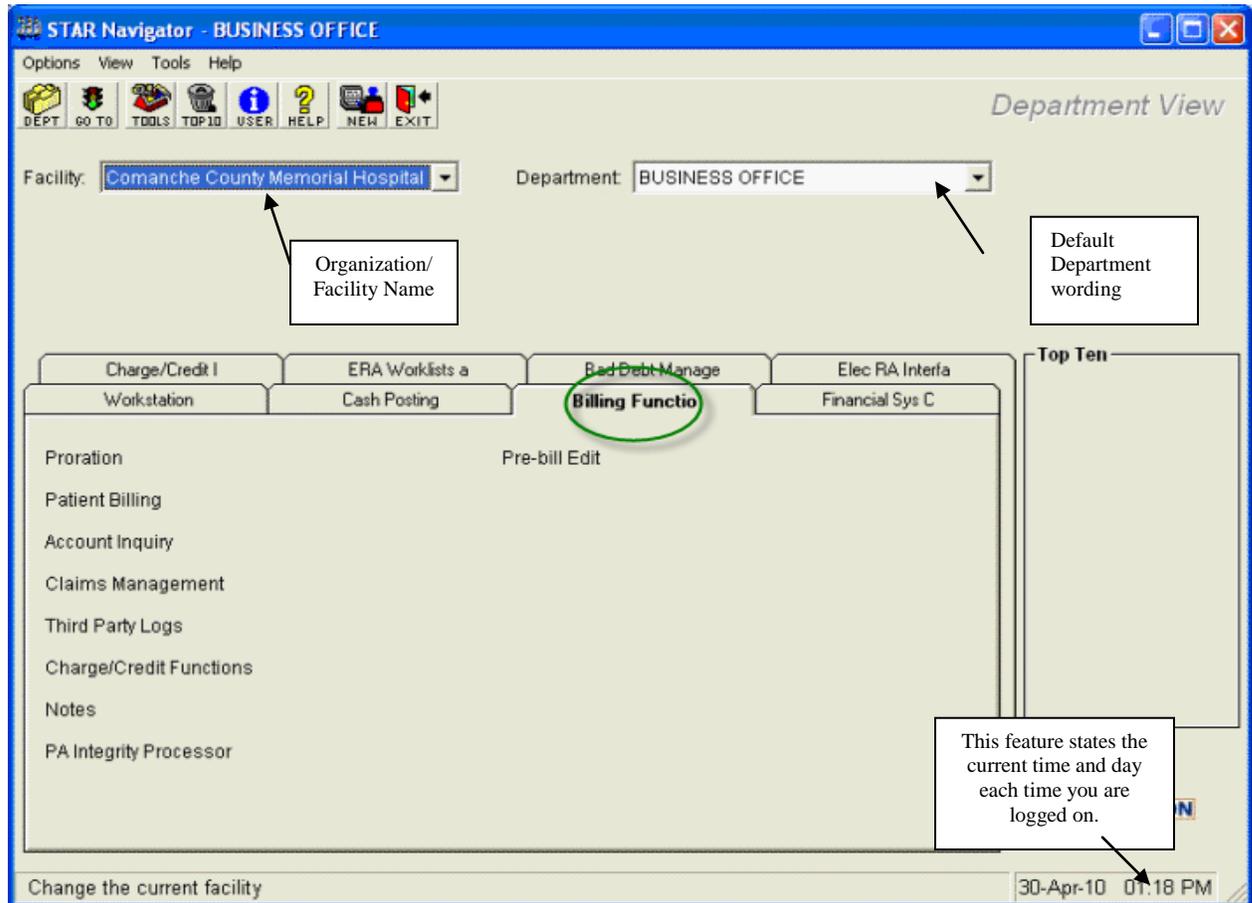
Callout 2 (Right): This is the first screen of the Account Revision area. This information includes the individual patient's remaining account balance, personal data, prior insurance payments, and insurance plans. You may press '-' or enter key to get to the specific options (see next screen shot). These options will allow the user to modify patient's personal data such as home address, phone number, relationship status, etc.

Callout 3 (Bottom Left): You may press the '-' or enter tab to get to the specific options. (See example screen shot below).

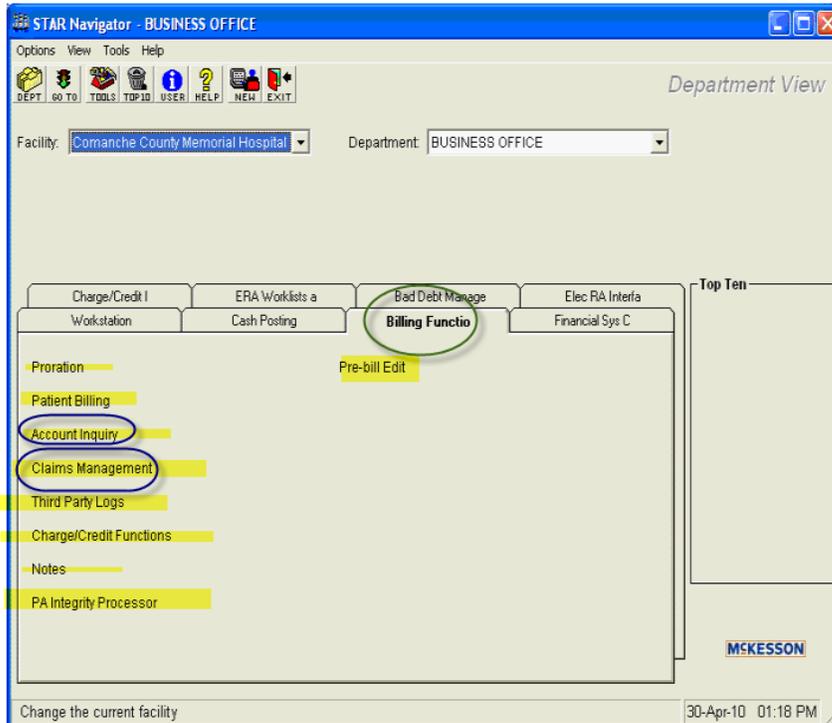
Callout 4 (Bottom Right): This tab will take you back to the beginning of Star Navigator. (commonly used)

NOTE: The items under each numbered area (i.e., Insurance Liability Amount, Payments, etc.) in the Account Revision screen will be covered in detail in a future lesson.

Billing Function Tab



NOTE: The **Billing Function** Tab
Is used mainly for *Account Information
Inquiries* and *Claims Management*
(Adding & making changes
to an existing claim). The following visuals will present these.



Options listed under the **Billing Function** tab:

Proration: Not used

Patient Billing: Takes you to the biller files (ones that passed or failed). Not used by the PARs.

Account Inquiry: Frequently used by the PARs to view accounts and document revisions made (see instructions under lesson portion *Documenting & Tracking Patient Accounts*).

Claims Management: Frequently used to view existing claims by each individual account. Ability to view both their insurance and demographic information.

Notes: A shortcut to view each patient account note made in the system.

Third Party Logs: Not used

Change/Credit Functions: Not used

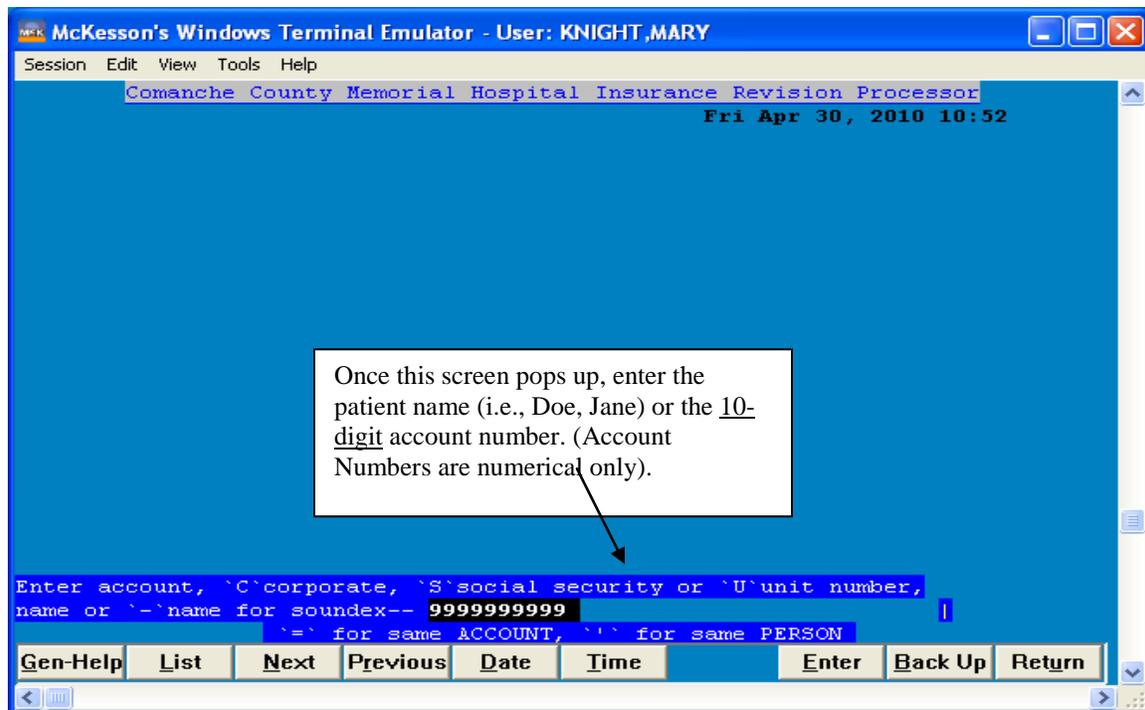
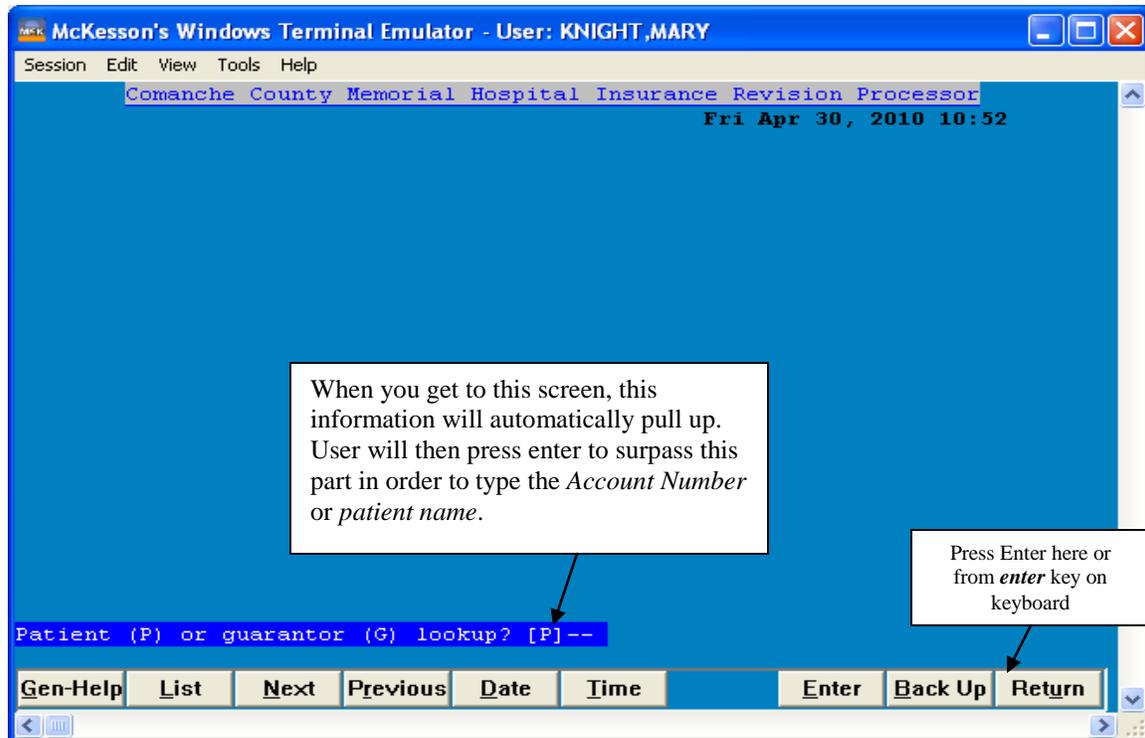
Notes: Not used

PA Integrity Processor: Not used

Pre-bill Edit: Not used

NOTE: Clicking on any of these options under the **Billing Function** tab will prompt you directly to the McKesson Window screen.

- **NOTE:** Before you do this, *STAR Navigator* will prompt the user to enter the account number or patient name as demonstrated below.



Account Inquiry Tab

The *Account Inquiry* option is frequently used by the Patient Account Representatives (PARs) to view account information and document account revisions. (See portion on *Documenting and Tracking Account Revisions* mentioned later in this document).

Information in this screen viewable by the user is the patient's account number, name, type of insurance plan, admit/discharge dates, account balance, insurance liability amount, insurance payments, SSN #, birth date, type of insurance coverage, etc.

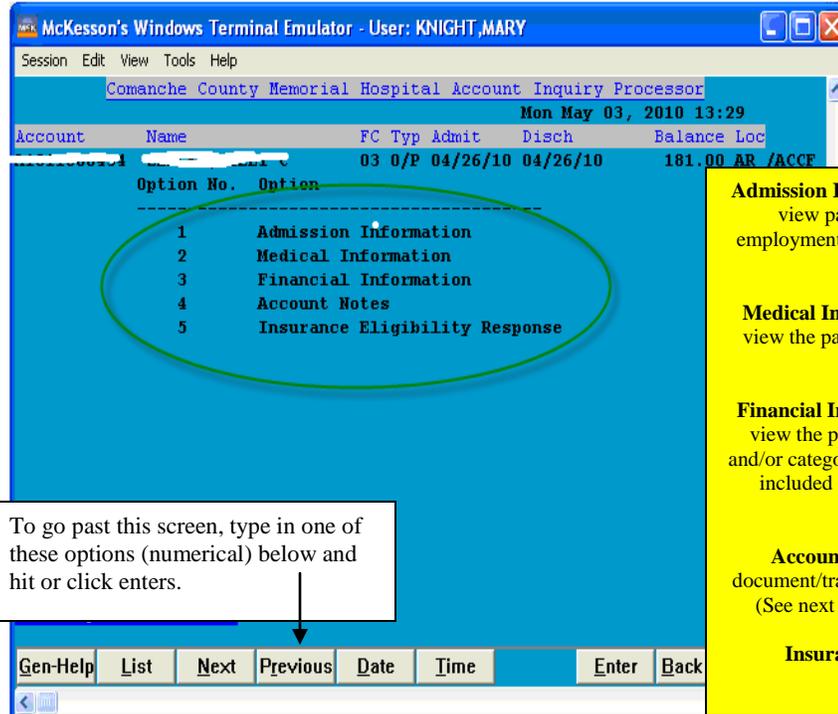
Each of these items will be discussed in further detail in a future lesson.

Account	Name	FC Typ	Admit	Disch	Balance Loc
02 ER			04/07/10	04/07/10	428.78 AR /ACCF
1 Total Charges	2 Total Adj	3 Total Payments	4 Ref? Exp? Pat Class		
\$428.78	\$0.00	\$0.00	No No		
5 Ins Liability	6 Ins Adj	7 Ins Payments	8 Agency		
\$428.78	\$0.00	\$0.00			
9 Pt Liability	10 Patient Adj	11 Pt Payments	12 Last Pt Payment		
\$0.00	\$0.00	\$0.00			
13 Wkfl	14 Sch	15 Schd Typ	16 Phone	17 Inv Gu Addr	18 Lst FU Dt Ty Sq Hld
200	Standard	Y/N/N	No		No
19 BD Pre-Listed	20 BD Date	21 Agency	22 BD Transfer Amount		
23 SSN #	24 Birth Date	25 BillHld	26 DPW/CMS	27 Nts	28 PRE/Adm 29 Accts
432-91-3404	01/02/1997	No	No/No	Yes	/CD Yes
30 COB Ins Carrier	#Clm LCS SubmitDt	Est Amt Due	Amt Pd Dsp Date		
1 MEDICAID UNIVERSA	1 2	\$428.78			

Press NL for Menu, enter code, or '-' for list--

Gen-Help List Next Previous Date Time Enter Back Up Return

Press enter to get to the next set of screen options from Account Inquiry.



Admission Information (Option 1) – User will be able to view patient demographic information, place of employment, guarantor, relative, insurance coverage, and other miscellaneous information.

Medical Information (Option 2) – User will be able to view the patient’s medical history, reason for admission and types of services received.

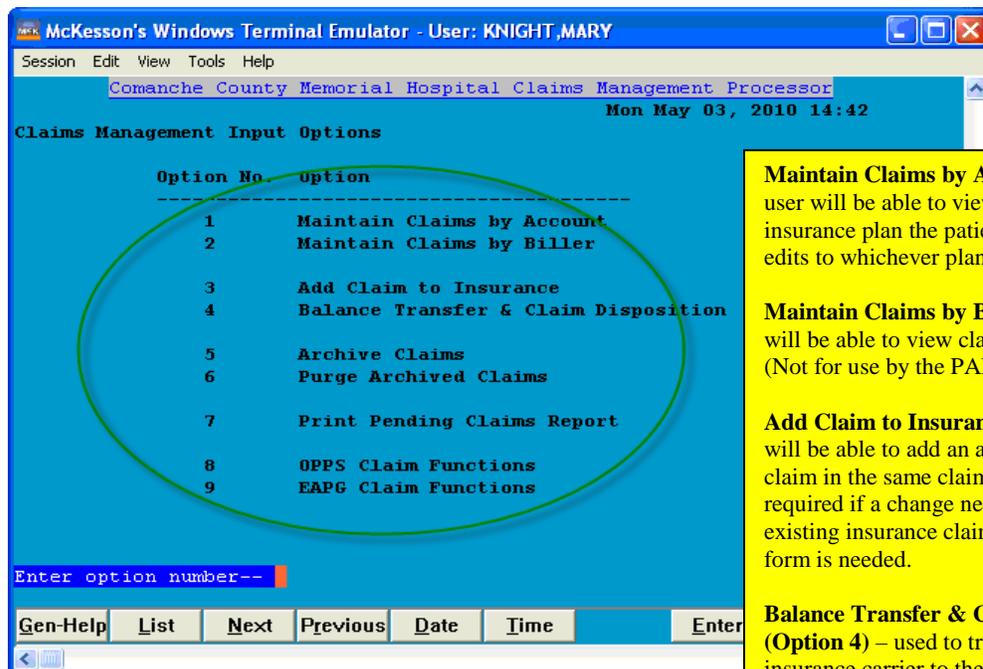
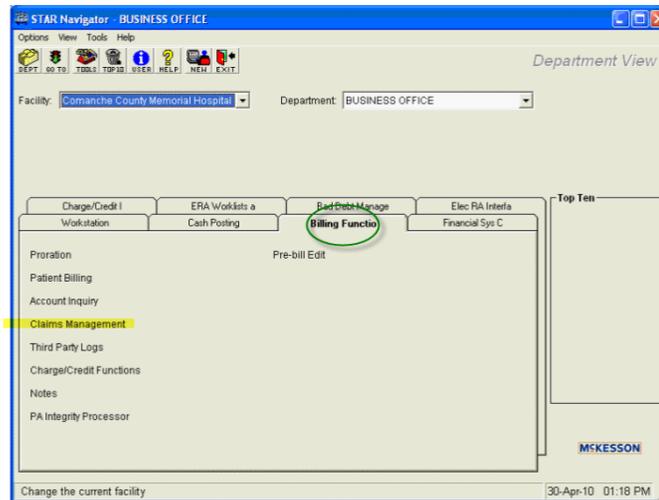
Financial Information (Option 3) – User will be able to view the patient’s summary of charges either by detail and/or categorized by dates of service. Charges will also be included on the electronic or paper claim form upon submission of claim.

Account Notes (Option 4) – User will be able to document/track patient account revisions from this option. (See next lesson portion on *Documenting Revisions*).

Insurance Eligibility Response (Option 5) – Option not used.

Note: Usage of each of these options will be covered in detail in a future lesson. This is just an overview of what the user will see or perform as part of their required duties.

Claims Management Tab



Maintain Claims by Account (Option 1) – user will be able to view each separate insurance plan the patient has and can make edits to whichever plan necessary.

Maintain Claims by Biller (Option 2) – biller will be able to view claims maintained by date. (Not for use by the PAR).

Add Claim to Insurance (Option 3) – user will be able to add an additional insurance claim in the same claim. This is typically required if a change needs to be made to an existing insurance claim and a hardcopy claim form is needed.

Balance Transfer & Claim Disposition (Option 4) – used to transfer money from one insurance carrier to the next.

Archive Claims (Option 5) – not used

Purge Archived Claims (Option 6) – not used
Print Pending Claims Report (Option 7) – not used

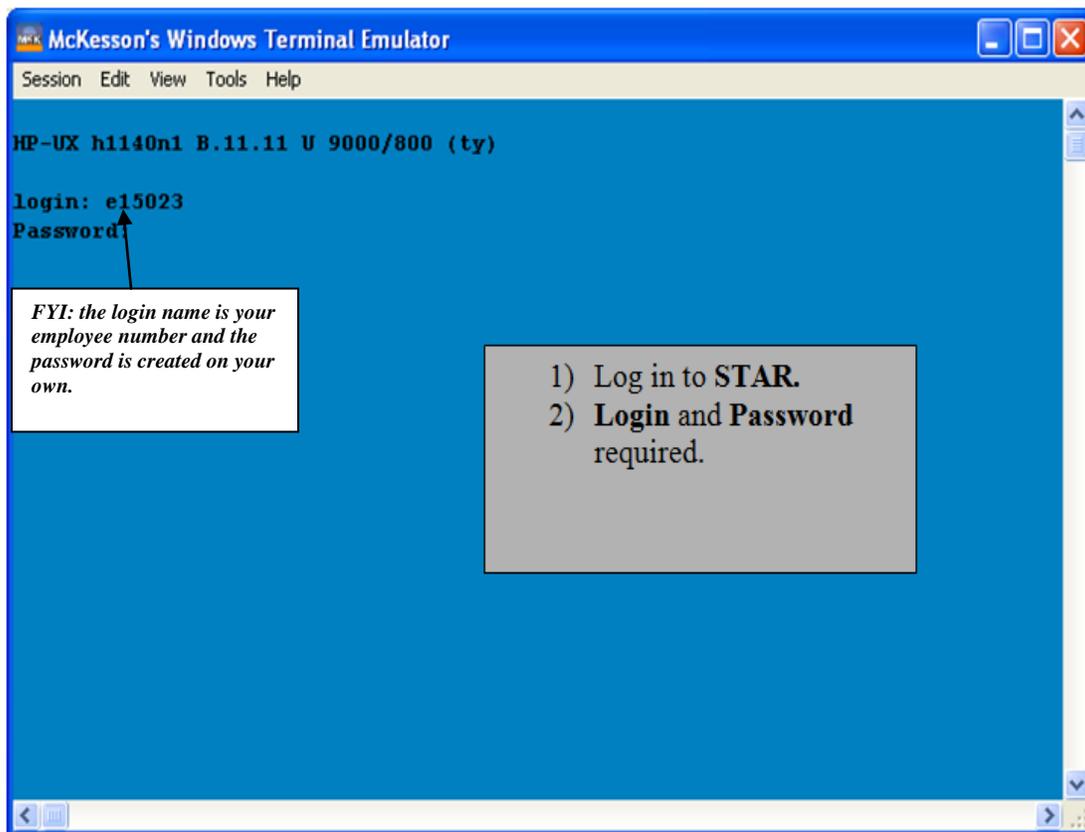
OPPS Claims Functions (Option 8) – not used
EAPG Claim Functions (Option 9) – not used

Note: Each of these options will be covered in detail in a future lesson. This is just an overview of what the user will see or perform as part of their required duties.

***Step-By-Step Instructions in
Documenting and Tracking Patient &
Insurance Revisions in the McKesson (STAR) system***

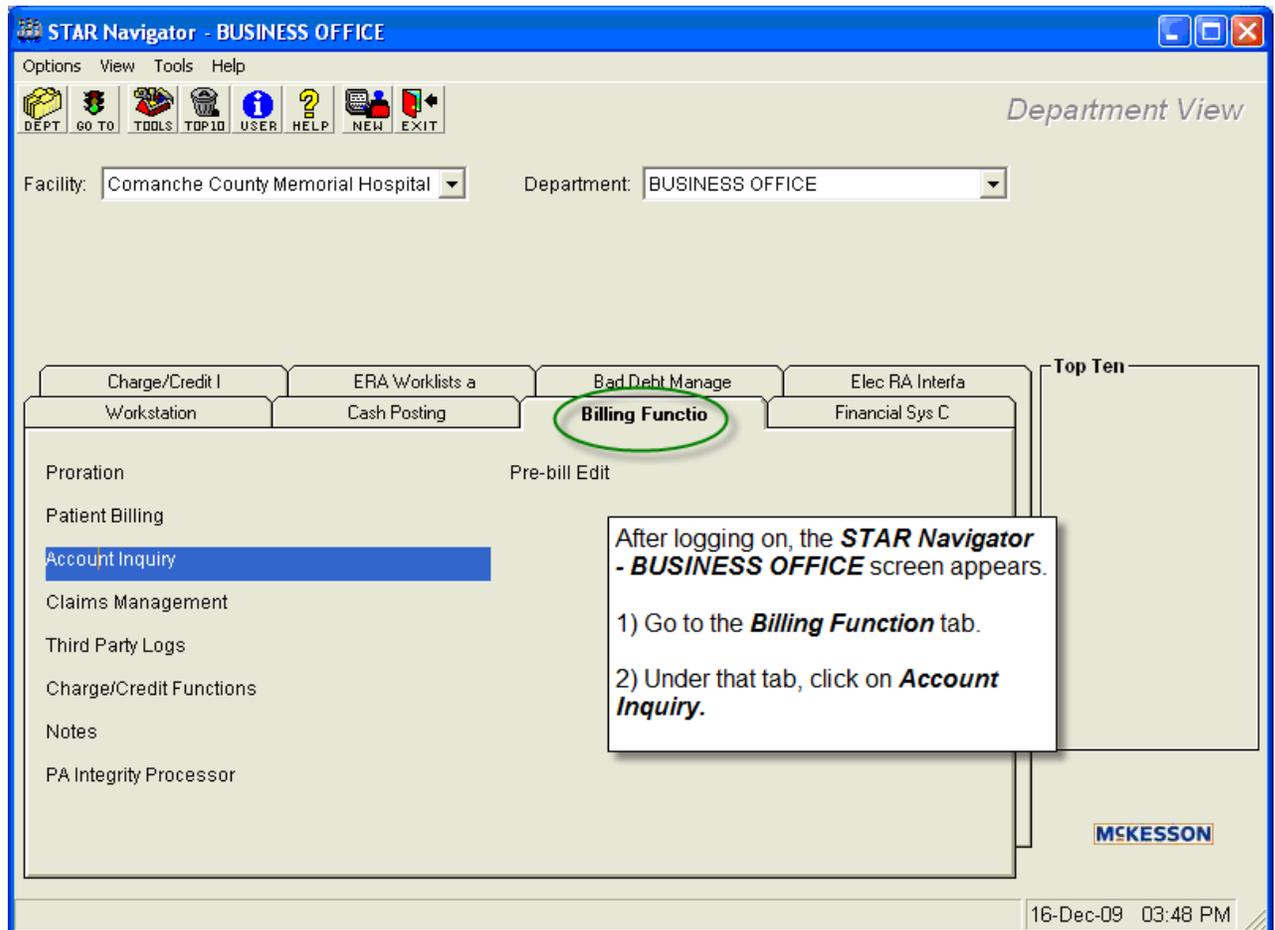
Overview: This lesson portion will demonstrate to each Patient Accounts Representative (PAR) the documenting and tracking procedures in the McKesson (STAR) system.

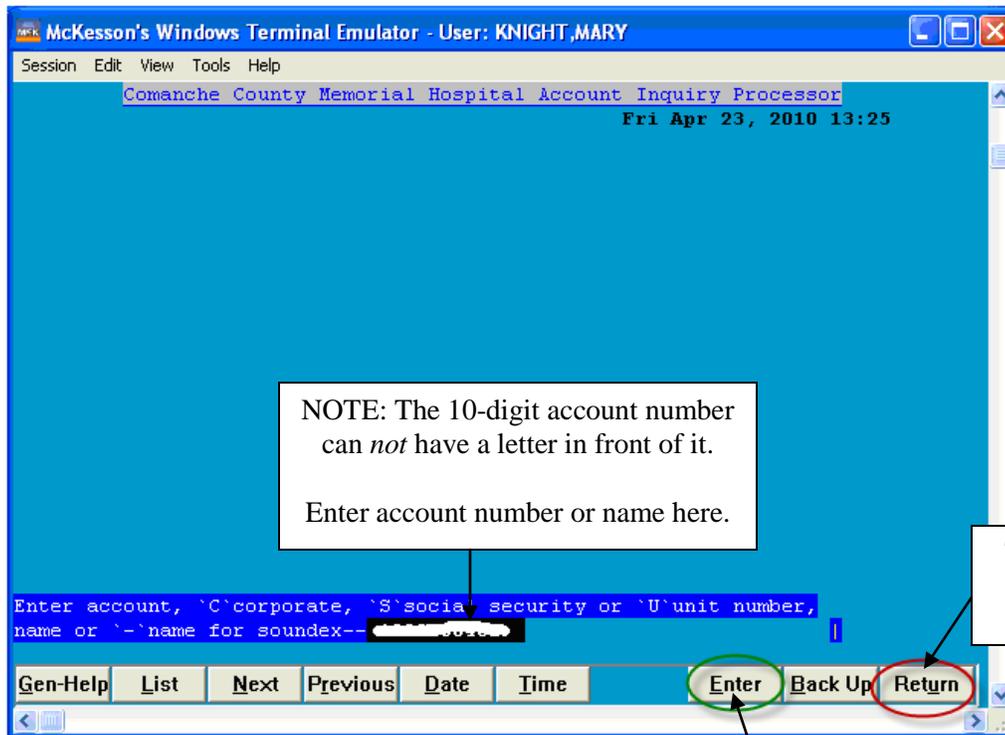
Log In Procedures



Documenting Procedures

FYI: the Account Inquiry screen is the same area as covered in the lesson portion on the **Billing Function** tab. However, this portion demonstrates how to document and track patient account revisions located in one of these options in STAR.





NOTE: The 10-digit account number can *not* have a letter in front of it.
Enter account number or name here.

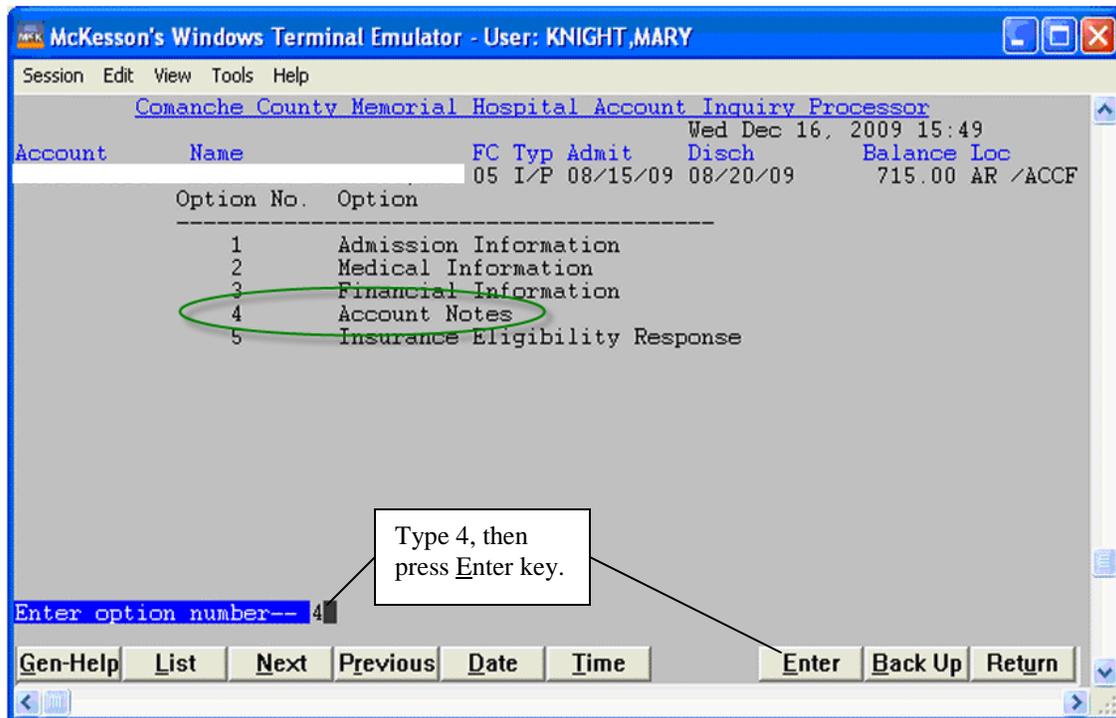
This key will take you back to the main screen.

Press Enter key after typing account number or patient's name.

NOTE: *Account* is the Patient's account number (typically used for Account Inquiries).

- 'C' corporate does not apply
- 'S' used to locate Patient's Social Security Number.
- 'U' unit number is not used.
- 'Name' can be used.
 - (E.g., Doe, [last], Jane [first], or Doe, J ([last name, first initial]).

After pressing enter key from the previous page, the below options pull up.
Account Notes is where the user needs to go.



McKesson's Windows Terminal Emulator - User: KNIGHT, MARY

Session Edit View Tools Help

Comanche County Memorial Hospital Account Notes Processor

Fri Apr 23, 2010 13:18

Account	Name	FC Typ	Admit	Disch	Balance	Loc
05	SER	01/01/10	01/31/10	28.80	AR	/ACCF

Page: 01 Notes ##=Current Choices

(1) RECD LETTER FROM BCBS STATING 04/05/10 [F]

Existing note already typed in.

Date note was typed

Representative name goes here

The "add free form (F)" feature is used to type a new account note into the system. To do this, you would type the letter 'F'. When adding a new note, this is the only key you would type.

The 'F' key will prompt you to type the note.

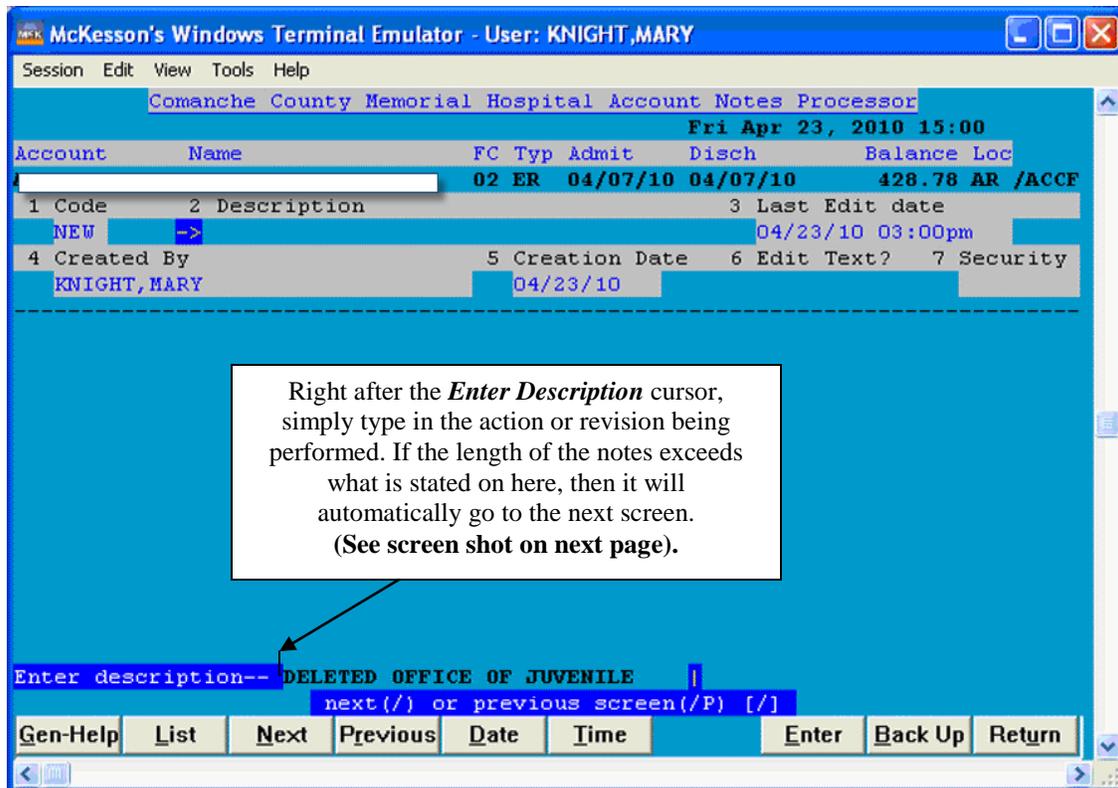
Type in the letter F, then Enter key.

Enter choice, view all(V), add free form(F) or standard(S) notes-- F

end select (NL)

Gen-Help List Next Previous Date Time Enter Back Up Return

See Example Notes on Following Pages.....

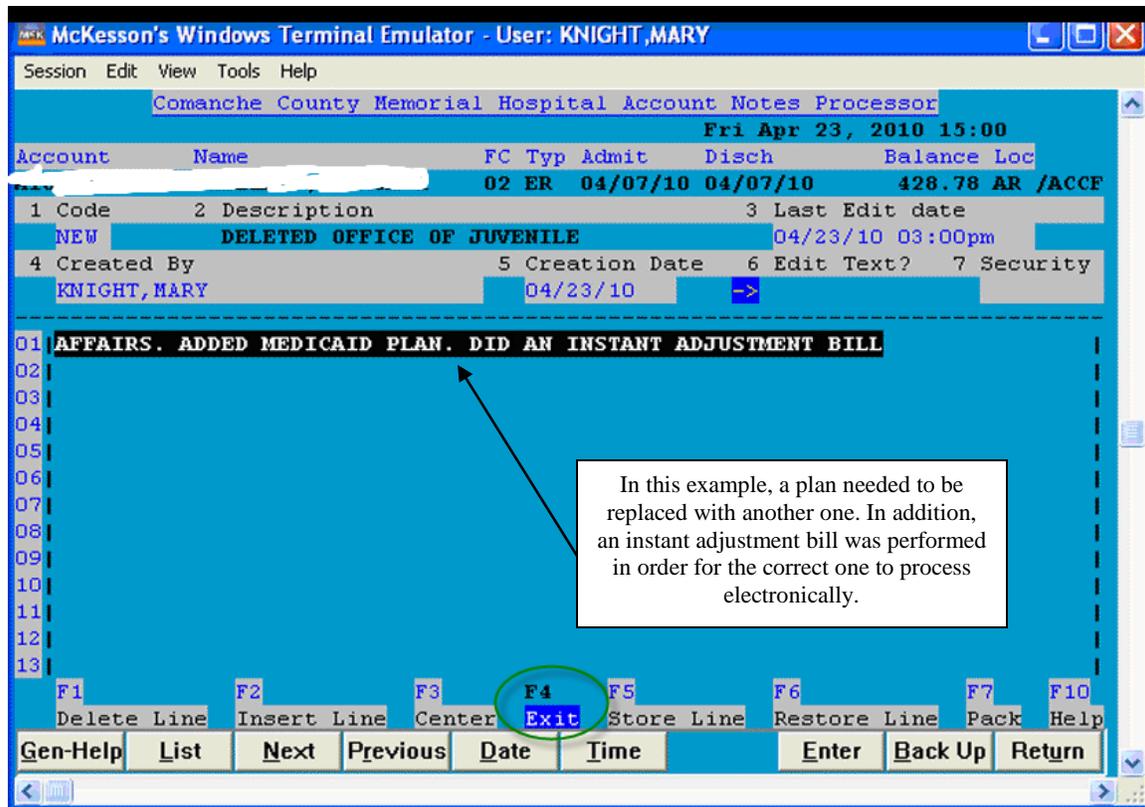


Right after the *Enter Description* cursor, simply type in the action or revision being performed. If the length of the notes exceeds what is stated on here, then it will automatically go to the next screen. (See screen shot on next page).

Enter Description: Type in the revision made to the individual patient account (sentence form - some abbreviation is allowed).

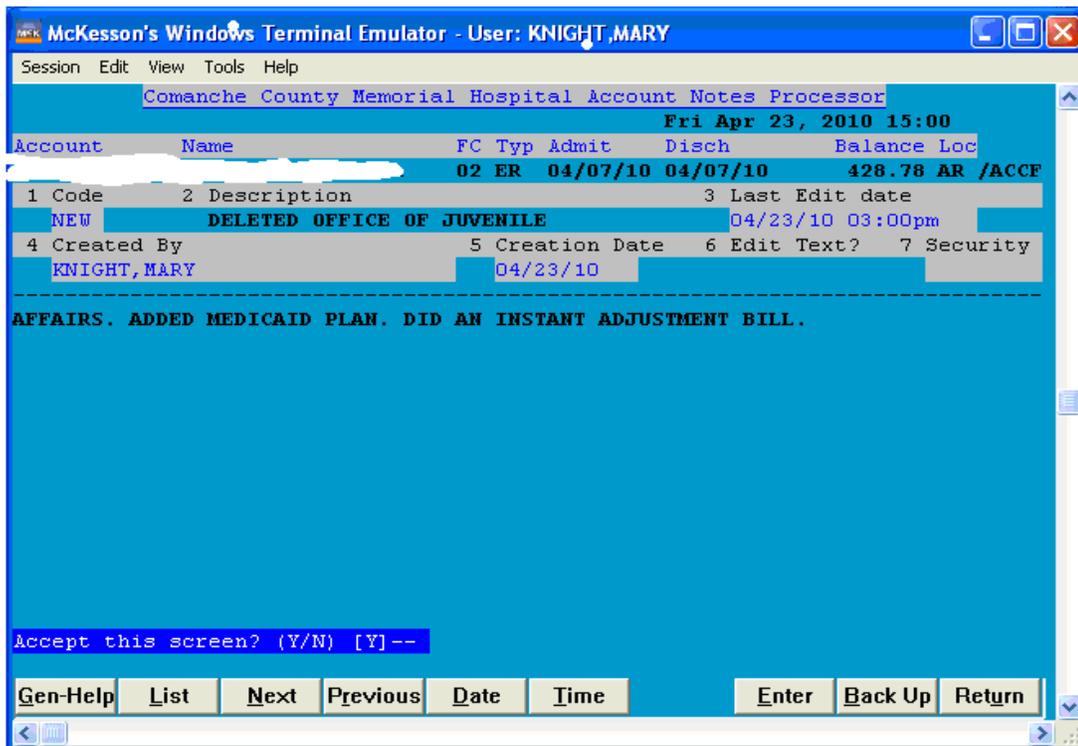
Example: This patient plan was deleted from the McKesson system. (See note typed).

(See next screen shot below on lines exceeding the one above. This is a continuation from the previous screen).



Enter Description: Shown above is the rest of the account revision note. Depending on the number of characters, it will prompt you to type the rest of the account in this screen.

Press **F4** when completed. This will prompt you to exit and save changes.



Accept This Screen? In order to save changes, type in **Y**. The message will then say **"Filed!"**.

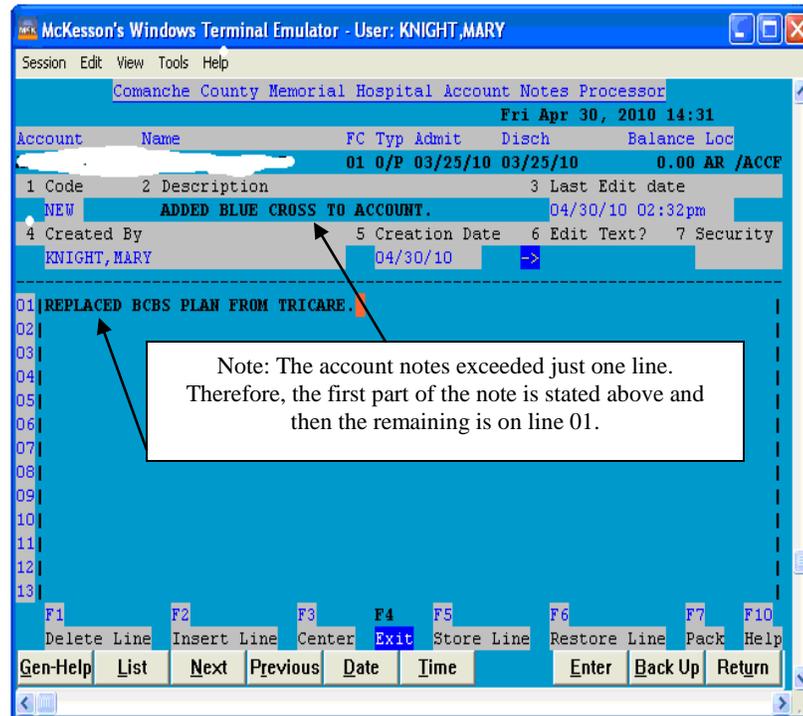
NOTE: If you make an error and decide not to save the changes, type in **'N'** for *No* and the period, enter keys (. enter) until you are out of that screen.

NOTE: After changes are filed, it will then prompt you back to the Account Notes screen.

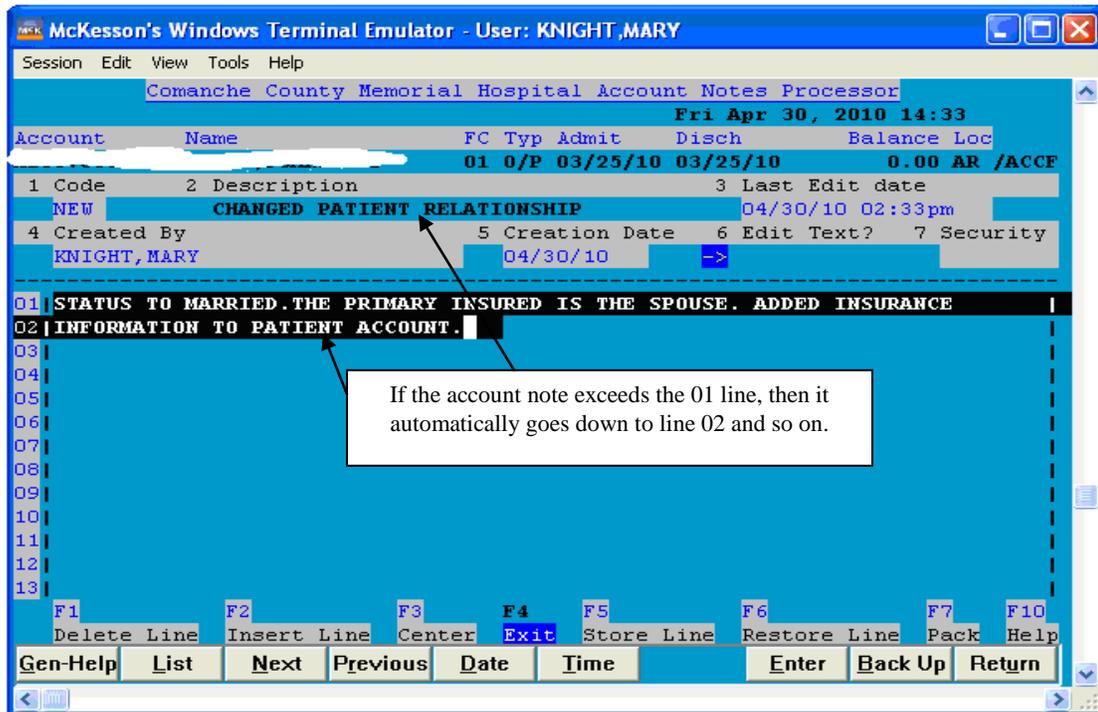
More common examples are presented as to what types of account revisions the Patient Account Representatives (PARs) use on a daily basis. This gives an idea as to the word usage based on each revision.

(See Page 26 of this manual).

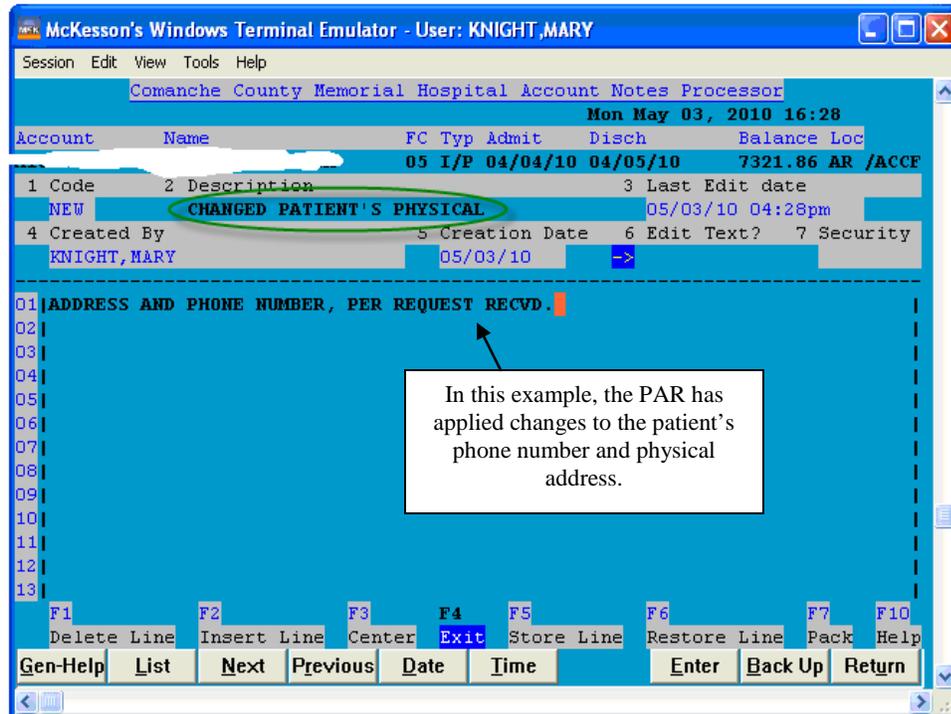
Common PAR Example #1: Replace an insurance carrier with another one. This requires having to delete the existing insurance carrier and replacing it with a new one.



Common PAR Example #2: Changing a patient's relationship and insurance status. This entails having to change the patient's relationship status (i.e., from single to married) and then having to add a new insurance plan (i.e., the spouse may now be the primary insured).



Common Example #3: Changing a patient's demographic information



McKesson's Windows Terminal Emulator - User: KNIGHT, MARY

Session Edit View Tools Help

Comanche County Memorial Hospital Account Notes Processor

Mon May 03, 2010 16:28

Account	Name	FC Typ	Admit	Disch	Balance	Loc
05	I/P		04/04/10	04/05/10	7321.86	AR /ACCF

1 Code	2 Description	3 Last Edit date
NEW	CHANGED PATIENT'S PHYSICAL	05/03/10 04:28pm

4 Created By	5 Creation Date	6 Edit Text?	7 Security
KNIGHT, MARY	05/03/10	->	

01 ADDRESS AND PHONE NUMBER, PER REQUEST RECVD. |

02 |

03 |

04 |

05 |

06 |

07 |

08 |

09 |

10 |

11 |

12 |

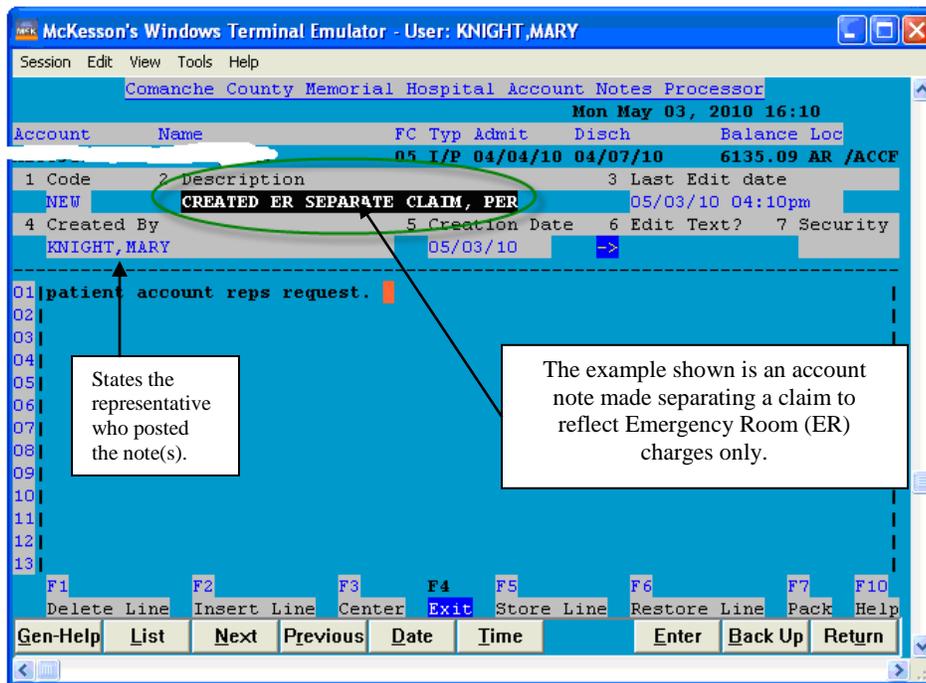
13 |

F1 Delete Line F2 Insert Line F3 Center F4 Exit F5 Store Line F6 Restore Line F7 Pack F10 Help

Gen-Help List Next Previous Date Time Enter Back Up Return

In this example, the PAR has applied changes to the patient's phone number and physical address.

Common Example #4: Splitting a Patient's Bill to Reflect Separate Charges.



McKesson's Windows Terminal Emulator - User: KNIGHT, MARY

Session Edit View Tools Help

Comanche County Memorial Hospital Account Notes Processor

Mon May 03, 2010 16:10

Account	Name	FC Typ	Admit	Disch	Balance	Loc
		05	I/P	04/04/10	04/07/10	6135.09 AR /ACCF

1 Code	2 Description	3 Last Edit date
NEW	CREATED ER SEPARATE CLAIM, PER	05/03/10 04:10pm

4 Created By	5 Creation Date	6 Edit Text?	7 Security
KNIGHT, MARY	05/03/10	->	

01 patient account reps request. |

02 |

03 |

04 |

05 |

06 |

07 |

08 |

09 |

10 |

11 |

12 |

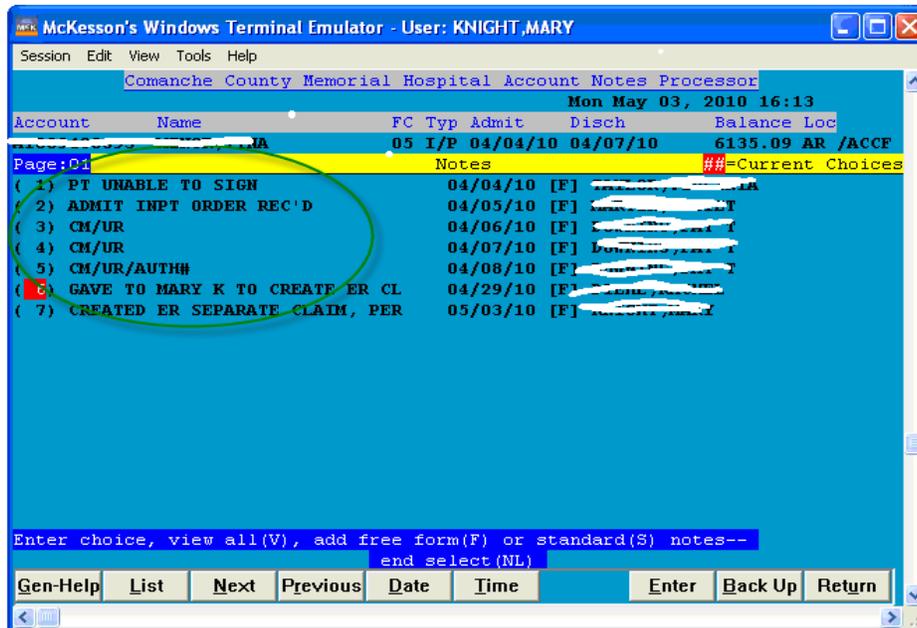
13 |

F1 Delete Line F2 Insert Line F3 Center F4 Exit F5 Store Line F6 Restore Line F7 Pack F10 Help

Gen-Help List Next Previous Date Time Enter Back Up Return

States the representative who posted the note(s).

The example shown is an account note made separating a claim to reflect Emergency Room (ER) charges only.



The above visual provides an example of the multiple account notes typed by different employees shown on one screen. Each activity that is documented states the employee (representative) name, date of documentation, and action performed on this account.

To exit McKesson (STAR):

Go to **Session**, and then Exit...

Account	Name	FC Typ	Admit	Disch	Balance	Loc
05	I/P		04/04/10	04/07/10	6135.09	AR /ACCF

Notes

- 1) PT UNABLE TO SIGN 04/04/10 [F]
- 2) ADMIT INPT ORDER REC'D 04/05/10 [F]
- 3) CM/UR 04/06/10 [F]
- 4) CM/UR 04/07/10 [F]
- 5) CM/UR/AUTH# 04/08/10 [F]
- 6) GAVE TO MARY K TO CREATE ER CL 04/29/10 [F]
- 7) CREATED ER SEPARATE CLAIM, PER 05/03/10 [F]

Enter choice, view all(V), add free form(F) or standard(S) notes--
end select(NL)

Gen-Help List Next Previous Date Time Enter Back Up Return

WEM Disconnect request intercepted.

IF WEM is closed while connected to a Navigator session, the system may become unresponsive!

Are you SURE you want to disconnect now?

Yes No

The following message will pop up. Click **Yes**.

This concludes the lesson Instructional
Manual on: *McKesson (STAR) Web-Based
Training (WBT): Navigation & Documentation.*



Click back to: [Top of the Document](#)