

# EMR PANEL SUBMISSION GUIDE

## TELUS HEALTH – MED ACCESS

# Contents

Contents .....	2
Section 1 – Submitting the Panel Report .....	3
Step 1 - How to create a bill template? .....	3
Step 2 - How to apply the bill template to the list of empaneled patients?.....	5
Step 3 - How to batch approve the bills?.....	7
Section 2 – Facility Number .....	8
How to set up the Facility Number? .....	8
Where To Access Extra Support .....	9
Provincial Attachment System (PAS).....	9

## DISCLAIMER

This document is a general guide only and is not intended to replace EMR vendor set up and training.

This guide was created with the support of the EMR vendor. It was developed by staff at the Doctors Technology Office (DTO), Practice Support Program (PSP) and Doctors of BC Billing Support Team, and therefore does not form part of the EMR vendor's official documentation.

# Section 1 – Submitting the Panel Report


**NOTE:** Panel reports can be submitted using the reporting services feature of Med Access. A bill template is created which is applied to the list of empaneled patients using Reports. These bills are then submitted in batches.

**NOTE: You must have completed the steps to clean up your panel and develop your list of empaneled patients. The following guide and video outline how to prepare your list of empaneled patients so that it is accurate and up to date.**

- Access the Med Access Empanelment How-to Guide [here](#).
- Watch the Med Access Empanelment Video [here](#).


## Step 1 - How to create a bill template?

**NOTE:** You need to have Template administrative access to create Templates.

1. From the main EMR page, Click on the Templates icon  Templates .
2. This opens the Template Management window. Select the Bills tab.

### Template Management



3. Click on the New icon  . This opens a new Bill Template window.

**Bill Template**

1 Template Name: **Panel Report** 2 Edit Privilege: **All Users** Use Privilege: **All Users**

Workflow Template:

Billing Provider\*  Skill  Referred From  Referred To

3 Billing Item 1  Code  (PHC)  Calls (qty)  Insurer

**Primary Care Panel Re** **98990** 1

4 Diagnosis 1  Code  Claim Type  3rd Party Insurer

**LFP Payment Model** **L23** 0 - General Claim  Select Favourite...

Include All Fields

Payee #  ICBC #   End Date  Diagnostic Facility

Claim Code   Corresp.  MVA   After Hours   Location   Rural Retention

**L- Longitu**




MSP Facility   Clinic Facility #

Internal Comment


## How to populate your bill template?

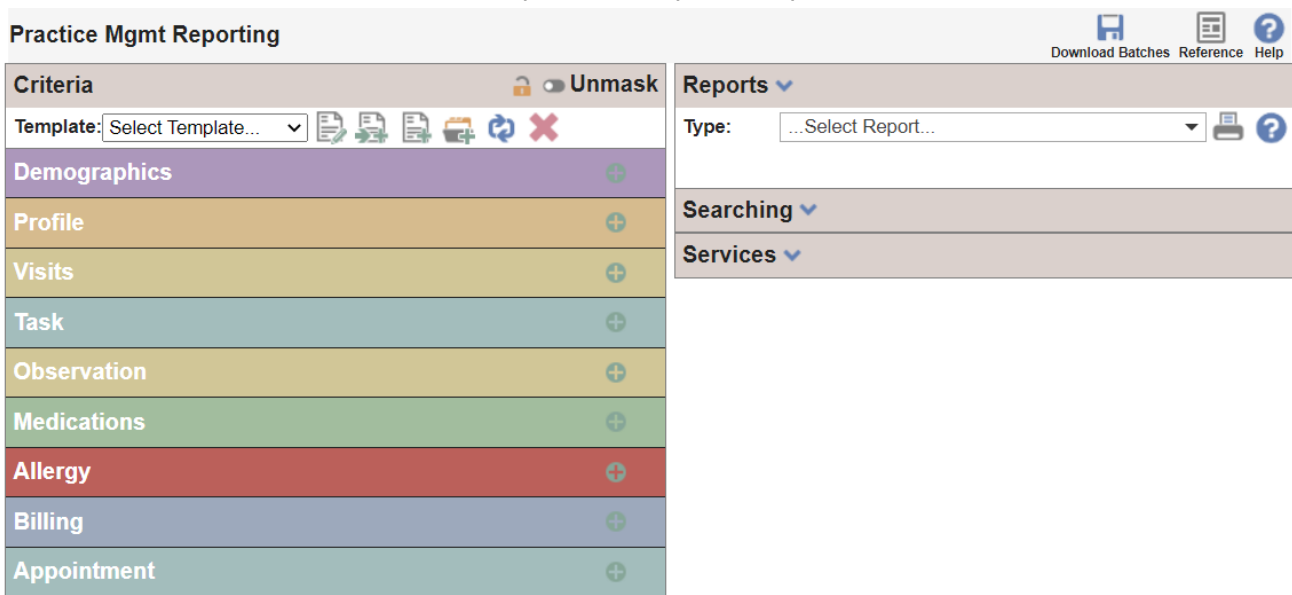
1. **Template Name** - Enter the name for the Bill Template, e.g. "Panel Report".
2. **Privilege** - If you would like all users to be able to edit and use the template, select **All Users** for both the Edit Privilege and Use Privilege.
3. **Billing Item** - enter the code **98990** in the Code field. Click on the binoculars and the description of **Primary Care Panel Report** will automatically populate. Otherwise, a new window will open allowing you to find the code.
4. **Diagnosis (ICD-9 code)** - enter the diagnosis ICD-9 code **L23** in the Code field. Click on the binoculars and the description of **LFP Payment Model** will automatically populate if the code is in Med Access.

**NOTE:** the diagnosis ICD-9 code **780** (General Symptoms) can also be used instead of **L23**.

5. **Location (service location code)** – select the location from the drop-down list. 'L - Longitudinal Primary Care Practice', is likely to be the location code.
6. **MSP Facility** - A Facility Number is required when submitting your claims. A provider can obtain the Facility Number from the provider responsible for administration of the clinic. Populate with the **Clinic's Facility #**.
7. To save the template, click the Create Bill button .
8. **NOTE:** The bill template needs to be set as a favourite to ensure it is available in report services.  
In the Bill Template window, click on the User Favourite icon to turn it pink , or the Clinic Favourite icon .

## Step 2 - How to apply the bill template to the list of empaneled patients?

1. From the main EMR page click on the Reports icon  Reports.
2. Select the criteria from the left side to pull the empaneled patient list.



The screenshot shows the 'Practice Mgmt Reporting' interface. On the left, under 'Criteria', there is a list of categories: Demographics, Profile, Visits, Task, Observation, Medications, Allergy, Billing, and Appointment. Each category has a green plus icon to its right. The 'Demographics' category is currently selected and highlighted in purple. On the right side, there is a 'Reports' section with a dropdown menu for 'Type' and a 'Searching' section with a dropdown arrow. At the top right of the interface, there are icons for 'Download Batches', 'Reference', and 'Help'.

3. Expand the Demographic section, by clicking on the green plus.




A close-up view of the 'Demographics' section header. The header is a purple bar with the text 'Demographics' in white. To the right of the text is a green plus icon inside a square. A red rectangular box highlights the plus icon.


4. Select 'Active' for the **Status** and ensure that you are the **Primary Provider** selected.

**Demographics** ✕

Identifier	<input type="text"/>	Starts w <span>▼</span>
Gender	<span>▼</span>	
Status <span>+</span>	Active <span>▼</span>	
Last Name	<input type="text"/>	Starts w <span>▼</span>
First Name	<input type="text"/>	Starts w <span>▼</span>
Middle Name	<input type="text"/>	
Primary Provider	Doe, Jane <span>▼</span>	


- On the right side, click on the blue arrow next to Searching **Searching** ▼.
- Click on the binoculars  **Search** to run the search.





**Searching** ▼

Type:  ▼  **Search**

- This will list all the patients that meet the search criteria.

**Searching** ▼

Type:  ▼  **Search** Limit  ▼

<input checked="" type="checkbox"/>	Patient Name	Ins #	Birthdate	Gender	Provider
<input checked="" type="checkbox"/>	 Test , Francisco J		12-May-1998	O	J. Doe
<input checked="" type="checkbox"/>	 Test , Jemima		23-Jan-1980	F	J. Doe
<input checked="" type="checkbox"/>	 Test , Wil Julius	9184126363	24-Feb-1985	M	J. Doe
<input checked="" type="checkbox"/>	 Test , Young Infant		10-Oct-2022	F	J. Doe

Export options: [Excel](#) | [PDF](#) | [RTF](#)

Adjust the limit to show additional patients on the page by clicking on the black arrow Limit  ▼ and selecting 200 from the drop-down list Limit  ▼.



**NOTE:** the batch process will only apply to the patients displayed on the page.

- All are selected by default. Select/unselect the blue check marks  as needed.
- Click on the blue arrow next to services **Services** ▼.


**NOTE:** if you do not see the Services option, you will need the 'Batch Privilege' in the user Permissions for this.

- Type - From the drop-down list, select Apply Bill.

**Services** ▾

Type:    Help

Billing Template:  ▾

Service Date:  

For Patients Primary Provider:

11. Select the **Billing template** that was created in step 1.

12. Select the **Service Date**.



13. Check the box **For Patients Primary Provider**.

**WARNING!** – there is no UNDO for this process, be careful when choosing the list of patients to add a bill for.

14. Click on the Gears icon  to apply the bill template to the selected patients on the page.

**NOTE:** you will briefly see a blank popup. When the popup disappears the bill template has been applied to all the patients on the page.


**WARNING!** – be careful to only click the gears icon once per page, otherwise duplicate claims will be created.

15. Select the next page of patients, by clicking on the green arrow , and click the Gears icon again .

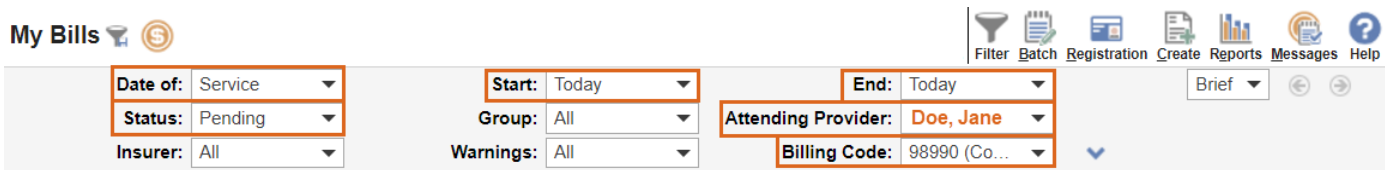
16. Repeat the process for each page of patients as required.



### Step 3 - How to batch approve the bills?

**NOTE:** you will need to have user permissions to Batch Update bills.

1. From the main EMR page, click the My Bills icon .
2. Using the filters (**Date of**, **Start**, **End**, **Status**, etc.), filter the list to the desired list of bills. Ensure that **Status** is only set to 'Pending'. If only approving bills for one provider, set the **Attending Provider**.


The example below has the following filters: bills created today, with a pending status, with 'Doe, Jane' as the provider, and only 98990 bills.



**NOTE:** to filter by the Billing Code, click on the blue arrow  and select Billing Code  Billing Code . In the top right box  enter 98990.

3. Actions only apply to the bills listed on the first page. To batch approve all bills in the list, you need to either submit them one page at a time or expand the number of bills displayed on a page.

4. To change the number of bills on a single page. Hover over the right green arrow  . The number of bills will be displayed (e.g.  ). Click on the black arrow , and select the desired limit to display on a single page.

5. Click on the Batch icon  **Batch** . This displays the Batch Update and Bulk Approve options.



6. Click the Bulk Approve icon  . This will approve all the bills on the page.

7. Repeat for each page.

## Section 2 – Facility Number

**NOTE:** A Facility Number is required when submitting your panel. A provider can obtain the Facility Number from the provider responsible for administration of the clinic.

For any questions on the Facility Number, you can contact Teleplan support at 1-866-456-6950.


If your clinic does not have a facility number - apply for one [here](#).

### How to set up the Facility Number?

**NOTE:** Site Administrator access is required to create or update a Facility.

1. From the main EMR page, click on the Providers icon  .



2. Click on the Facilities icon  **Facilities** .

3. Either create new, by clicking on the New Facility icon  **New Facility** , or update an existing facility.

4. **Name** – enter a name for the Facility.

5. **Facility Number** – this is provided by HIBC when applying for the Facility.

6. **Billable** – uncheck this box. This is to ensure the Facility Name will appear in the **MSP Facility** drop down on a Bill.

### Create Facility



**Identification**

Name <input type="text" value="Clinic Facility Name"/>	Type <input type="text" value="Medical"/>	Sending Facility <input type="text"/>
Facility Number <input type="text" value="AB123"/>		Specialty <input type="text" value="No Known Specialties"/>
		Billable <input type="checkbox"/>

**Address & Phone**

Address <input type="text"/>	City <input type="text"/>	Province <input type="text" value="British Columbia"/>	Postal Code <input type="text"/>
	Country <input type="text" value="Canada"/>	Phone # <input type="text"/>	Fax # <input type="text"/>
Address Type <input type="text" value="Office"/>			

**Notes & Misc.**

Notes <input type="text"/>	Schedule Color <input type="text"/>
-------------------------------	--

Create Facility

7. If creating a new Facility, click the Create Facility button. If updating a Facility, click the Update button.

## Where To Access Extra Support

- EMR vendor support – TELUS Med Access Support Desk 1-888-781-5553
- Technical troubleshooting or Workflow support - Practice Support Program [PSP@doctorsofbc.ca](mailto:PSP@doctorsofbc.ca)

### Provincial Attachment System (PAS)

- Information on PAS can be found on the Doctors of BC website [here](#)
- For additional information or support on PAS - [HealthBcSupport@phsa.ca](mailto:HealthBcSupport@phsa.ca)