

## Patient Financials Search

Facility  Last Name  Date of Birth   
 Account #  First Name  SSN

### Patients

Show  items Filter:

Account Number	Patient Name	DOB	Admit	Discharged	Source	Fin Class	Insurance	Status	Total Charges	Balance
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**Trinisys' Patient Financial Services and Practice Management Solutions consolidates legacy data for A/R wind-down and collection agency management and provides solutions that range from a static PDF archive to detailed billing functionality.**

After a new system has gone live, it is common for organizations to have outstanding accounts receivable records that have not been converted into the new system. While it is an option to keep the legacy system running to access these outstanding records, it is expensive and requires additional resources. Trinisys Patient Financial Services (PFS) and Practice Management Solutions (PMS) enables organizations to continue collection efforts from decommissioned financial legacy systems.

### ClearView PFS and PMS Benefits

- Optimize collections from aged accounts receivables
- Perform queries and analyses of historical encounter details
- Collect the details necessary to respond to audit requests
- Capability to post payments, adjustments and notes, as well as generate on-demand statements, itemized bills, UB04, and CMS1500 claim forms

WASHINGTON GEORGE Home: 6155001212 Service Date: 2018-08-28 Financial Class: M  
 Cell: Location: Brentwood Rehab Insurance: MEDIC

SUMMARY **ACCOUNT DETAILS** ACCOUNT DETAILS NEW DEMOGRAPHICS DOCUMENTS

Show  items

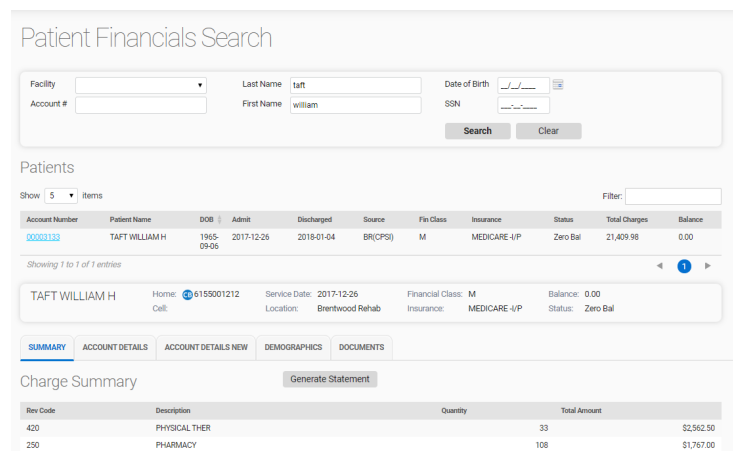
Type	Code	AR Date	Description	QTY	Charge	Pay	Seq	Elm	User	Dept	CPT	NDC	Chrg Code
Charge	85	2018-08-28	=>PT EVAL AND TX<=	1.00	\$0.00		0	9	VSC	1			1400040
Charge	85	2018-08-28	=>MUSCLE STRENGTHENING<=	1.00	\$0.00		0	10	VSC	1			1400052
Charge	85	2018-08-28	=>PATIENT AND FAMILY EDUCATION<=	1.00	\$0.00		0	11	VSC	1			1510032
Charge	85	2018-08-28	=>PT BALANCE AND COORDINATION<=	1.00	\$0.00		0	12	VSC	1			1400054
Charge	85	2018-08-28	=>PT ENDURANCE TRAINING<=	1.00	\$0.00		0	13	VSC	1			1400055
Charge	85	2018-08-28	=>PT GAIT TRAINING<=	1.00	\$0.00		0	14	VSC	1			1400051
Charge	85	2018-08-28	=>PT ROM EXERCISES<=	1.00	\$0.00		0	15	VSC	1			1400053
Charge	85	2018-08-28	=>OT EVAL AND TX<=	1.00	\$0.00		0	16	VSC	1			1500040
Charge	85	2018-08-28	=>MUSCLE STRENGTHENING<=	1.00	\$0.00		0	17	VSC	1			1400052
Charge	85	2018-08-28	=>OT ADL RETRAINING<=	1.00	\$0.00		0	18	VSC	1			1510029

Showing 1 to 10 of 276 entries Export to Excel

## Capstone Patient Financial Archive

Capstone Patient Financial Archive is our most basic and economical offering. This static multi-page PDF archive includes the key elements necessary to respond to audit requests. This archive is typically made up of:

- Charges/payments/adjustment journal
- Itemized bill
- Report of billing notes
- Correspondence
- 837 and 835 X12 transactions associated with an encounter
- UB04 or CMS1500 claims



Account Number	Patient Name	DOB	Admit	Discharged	Source	Fin Class	Insurance	Status	Total Charges	Balance
0000133	TAFTH WILLIAM H	1965-09-06	2017-12-26	2018-01-04	BR(CPSI)	M	MEDICARE 4/P	Zero Bal	21,409.98	0.00

Rev Code	Description	Quantity	Total Amount
420	PHYSICAL THER	33	\$2,562.50
250	PHARMACY	108	\$1,767.00

## Capstone with Static Ledger

This option is best suited for organizations with the objective to respond to audit requests, as well as have the ability to perform analysis of historical encounter details. Static Ledger is helpful in leveraging historical information for payor agreement dialogues, as well as for gaining an understanding of historical trends per payor, diagnoses, or procedure. Capstone with Static Ledger includes:

- All components of Capstone Patient Financial Archive
- Discrete data including charge line details for analysis
  - ClearView Practice Management (PMS) offers functionality to perform queries and export to Excel for further analysis
  - Discrete data may also be connected to an analytics platform, if desired

## Capstone with Active Ledger

Capstone with Active Ledger is best for organizations that need to manage legacy accounts receivable. This system is perfect for working down legacy receivables, coordinating third-party collection agencies, and posting remittance. Active Ledger allows for manual posting of payments, adjustments and notes, the semi-automated processing of 835 X12 remittance files, as well as the export and import of collection agency files. Necessary reporting for basic A/R management is available with the ability to export to Excel for further analysis. Capstone Active Ledger includes:

- All Components of Capstone Patient Financial Archive and Static Ledger
- Comprehensive set of functions to manage A/R including entering collection notes and generating demand statements, itemized bills, UB04 and CMS1500 claim forms

For more information regarding Trinisys and ClearView Patient Financial Services and Practice Management Solutions, please contact us at **877.874.6479** or **sales@trinisys.com**.