



## EMR Components Designed For Long Term Care

### Prerequisites

- Resident is admitted, or has been admitted in the past.
- Resident address should be on file (Admin - Resident Maintenance)

### Overview

This tutorial will guide you through the setup of Resident Medicare Policies in the Medeasy3 System. Proper policy setup is required to generate claims.

### Creating a Medicare Policy

In the “Receivables” area of Medeasy (top menu), select “Resident Policies” from the left menu bar. Select your facility and resident from the dropdown lists, and click “New” to create a new policy.

The new policy record gathers basic information about the policy. Click the “Show Admission Info” link above the policy record to expand and review some summary information pulled from the resident’s admission.



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Select the admission date from the dropdown list. Use the "Copy" linkbuttons to import data from the admission that is relevant to the Medicare policy. When you are done reviewing the admission information, click the "Hide Admission Info" to hide this panel.

[- Hide Admission Info](#)

Admission Record		
Select Admission	11/01/2011	
SSN	000110000	
Medicare #	med110000A	<a href="#">Copy</a>
Medicaid #	caid000000123	<a href="#">Copy</a>
VA #		<a href="#">Copy</a>
Level of Care	Skilled - SNF	
Primary Payor Cat	Medicare	<a href="#">Copy</a>
Secondary Payor Cat	Medicaid Skilled	<a href="#">Copy</a>
Tertiary Payor Cat	None Selected	<a href="#">Copy</a>
Resident Income	465.0000	
Income Type	Social Security Income	
Medicaid Prior Auth #	pa012345	



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Enter the basic policy information. Select the Medicare payor and the Medicare Payor Category. Enter the HIC number in the Policy Number field. Enter the effective date of the policy – using the resident’s original admission date is fine if you don’t know the effective date of the policy. If Medicare is the resident’s primary insurance policy, enter Payment Order “1”. The Medicare patient relationship is always “Self”, and the resident’s name and address is automatically imported to the subscriber name and address fields. If you do not see the resident’s address here, then you will need to first set it up in Admin – Resident Maintenance.

Amanda TestResident  
New Policy

[+ Show Admission Info](#)

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**Policy Record**  
Basic policy information

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Payor	MEDICARE - WPS Insurance Company
Payor Category	Medicare
Policy Number	med110000A
Effective Date	11/1/2011
Expired Date	
Payment Order	1
Patient Relationship	Self
Subscriber First Name	Amanda
Subscriber Middle Name	
Subscriber Last Name	TestResident
Subscriber Name Suffix	
Address Line 1	3 Test Street
Address Line 2	
City	Rome
State	GA
Zip Code	30165
Policy Notes	

When you click “Save”, the “Policy” and “Coverage” and “X” tabs appear. Click the “Coverage” tab to enter information about this resident’s Medicare coverage.

**NOTE:** At any time you can click the red “X” to shortcut out of this policy. Any unsaved changes will be lost. We don’t want to exit yet.





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Clicking the "Coverage" tab will bring you to coverage verification history. Every time you verify Medicare coverage, you can add a new coverage record to the list. The list / history is empty for a new policy. Click "New" to enter a new coverage record.

Amanda TestResident  
New Policy

**Policy** **Coverage** **X**

+ Show Admission Info

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**Coverage Records**  
Coverage records for selected policy

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No data to display

For Medicare, the only information you need to verify is the number of full and coinsurance days already used. If you are checking coverage online, you can enter something like "Medicare Coverage Database" in the "Case Manager Name" field, but this is optional. Click the "Save" button to return to the list.

**Coverage Record**  
Coverage record for selected policy

User Name: amandam  
Case Manager Name:   
Verification Ref #:   
Verification Date: 11/28/2011  
Verification Notes:

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	Total / Max	Used
# Full Days	20	<input type="text"/>
# Coinsurance Days	80	<input type="text"/>



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### More Information



Training access is available by clicking on the Medeasy Man. The information screen displayed will give brief tips and a link to training tutorials and videos.

### Resident Policies Information

Additional Info on the topic of this form

[Close](#)









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### Medeasy3 System's Financial Training Materials

#### Training Manuals

	<b>Tutorial #1 Attending Physician Information</b> Learn how to manage physician information plus all facility contact types.	10/11/2011
	<b>Tutorial #2 Admissions</b> Quick overview of how the admissions functions work in the Medeasy3 System.	10/11/2011
	<b>Tutorial #3 Payor Maintenance</b> Learn how to manage basic payor information including private insurance.	10/11/2011
	<b>Tutorial #4 GL Account Maintenance</b> Learn how to quickly set up, manage and navigate through GL Accounts.	10/13/2011

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