

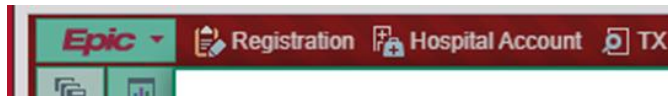
TIP SHEET
SEPTEMBER 2023

VIEW & PRINT RESEARCH STATEMENTS

Please note, due to the Epic templates, your screens may look different than the images in the tip sheet.

View and Print Statement

1. From Hospital Account, search the IRB# or study short name in the Patient field.
2. Select your study and click Accept.
3. If you know the account number, select it from the Acct ID column otherwise select your date range from the Adm Date column and click Accept.

A screenshot of the 'Hospital Account Lookup' search interface. The top navigation bar is visible. Below it, the 'Hospital Account Lookup' title is displayed. A search bar is present with a magnifying glass icon. To the left of the search bar, there are several buttons: 'Account', 'Guarantor', 'Patient' (which is highlighted in green), 'Invoice #', 'Tx Ref #', 'Subscriber ID', and 'Subset'. Below the search bar, there is a text input field with the placeholder text 'Enter a patient name or MRN to select their hospital accounts' and a magnifying glass icon.A screenshot of the Epic Hospital Account Lookup results table. The table is titled 'Selected Accounts (1)' and has a 'Recent' tab. The table has columns for 'Acct ID', 'Patient Name', 'Guar Type', 'Location', 'Class', 'Status', 'Type', 'Adm Dx', 'Primary Payer', 'Adm Date', 'Dis Date', and 'Bala'. The first row of data is highlighted in green and contains the following information: Acct ID: 100012052, Patient Name: NOTE, TEST, Guar Type: P/F, Location: Nebraska Medicine Par..., Class: Emergency, Status: DNB (DNB Error), Type: [Icon], Primary Payer: Self-pay, Adm Date: 09/08/2020, Dis Date: 09/08/2020, Bala: 0. At the bottom of the table, there are two buttons: 'Accept' (with a green checkmark icon) and 'Cancel' (with a red X icon).

4. Select the Guar Summary tab and then the Statements & Letter tab.
5. Select the statement period by clicking on the Date.
6. The auto-generated statement will open.
7. The print button is on the bottom right corner.

Test Note
53 years, 9/8/1970
MRN: 05007591
Acct ID: 100012052
in Class: Self-Pay

Acct Summary **Guar Summary** Report Viewer Hosp Tx Inquiry Liability Buckets

Guarantor Summary - 1 of 1 Accounts

Account Activities Patient Refund Go To Finish

Summary Accounts Payments **Statements & Letters** History

Acct Summary Doc Review Coverages History **Guar Summary** Hosp Tx Inquiry Liability Buckets CDI Review Coding Code Integration Daily Charges

Guarantor Summary - 1 of 1 Accounts

Account Activities Charge Entry Collect Payment Patient Refund Go To Finish Unit Charge Entry OnBase Account OnBase Guarantor

Summary Accounts Payments **Statements & Letters** History

Statements 6 of 6 Loaded ☐ Demand Show last: 3 Months 12 Months **All**

Date	Template	Statement #	New Charges	Prev Stmt Due	Insurance Bal	Self-Pay Bal	Stmt Due
08/14/2023	NMC SBO CO...	—	58.35	46.43	0.00	14.59	14.59
07/14/2023	NMC SBO CO...	—	127.35	14.59	0.00	46.43	46.43
06/14/2023	NMC SBO CO...	—	58.35	538.84	0.00	14.59	14.59
04/14/2023	NMC SBO CO...	—	2,155.35	941.52	0.00	538.84	538.84
02/14/2023	NMC SBO CO...	—	3,603.05	40.75	0.00	941.52	941.52
01/14/2023	NMC SBO CO...	—	163.00	0.00	0.00	40.75	40.75

Date Template

08/14/2023 NMC SBO CO...

07/14/2023 NMC SBO CO...

06/14/2023 NMC SBO CO...

04/14/2023 NMC SBO CO...

02/14/2023 NMC SBO CO...

Creating a Statement

1. From Hospital Account Maintenance, search the account ID from the Account field. Be sure to select HB & PB on Account Type.
2. Select your account and click Accept.
3. From the Acct Summary tab, click Account Activities.
4. Hospital Account Activity will open, select Send Detail Bill [359].
5. From Send Detail Bill section, select Type of Hospital Account.
6. Detail Bill Template is TNMC RSH Detail Statement.
7. Enter your date-of-service or date range in the Transaction Date Range fields.
8. Select your printer and click Print Now.
9. Click Accept.

The screenshot displays the 'Send Detail Bill' workflow in a software application. At the top, a navigation bar includes tabs for 'Acct Summary', 'Doc Review', 'Coverages', 'History', and 'G'. Below this, the 'Acct Summary - 1 of 1 Accounts' section shows a list of accounts with '359' selected. A 'Send Detail Bill' button is visible. The main form area is titled 'Send Detail Bill [359]' and includes a 'Choose Another Activity' link. It features an 'Add Note' section with a text area containing 'Creating a statement.' and a 'Summary' field. Below this, the 'Type' section has 'Guarantor' and 'Hospital Account' tabs. A message states 'Send a detail bill for the hospital account.' The 'Detail Bill Template' is set to 'TNMC RSH DETAIL STATEMENT'. The 'Transaction Date Range' is specified as '8/1/2023' to '8/31/2023'. At the bottom, there are 'Print Now' and 'Print Later' buttons, and a footer with 'Print 1 copy to ECCP3040SQ1' and an 'Edit' link. The bottom right corner has 'Accept' and 'Cancel' buttons.