SurroundLab™ AR

Client Pay for SurroundLab™ *AR*
Companion Guide
Revision: December 2018

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Introduction to the Client Portal for SurroundLab AR

The Client Portal for SurroundLab AR is the ideal way to boost client satisfaction and improve your workflow. Empower your clients with the ability to manage their invoices and missing information requests, anytime and anywhere.

How can the Client Portal improve efficiency and reduce costs for your laboratory?
Fully integrated with SurroundLab AR, the Client Portal makes perfect sense for your bottom line by:
- Streamlining your workflow and reducing manual processing of payments and missing information.
- Boosting efficiency and saving money with less printing and mailing of paper statements. Reduces the faxed missing information requests to your clients.

Convenient and easy for Clients:
Verified payments are immediately applied to a batch within SurroundLab AR, which can be quickly reviewed and posted. Management Reports allow for close monitoring of web based payment activity. Updated missing information is instantly sent to SurroundLab AR, resulting in a shorter request to completion cycle.

Configuration Settings in SurroundLab AR

The Client Portal application utilizes File Definition, as well as the Order Entry and Transfer Queue work queue data, from SurroundLab AR. No patient or client data is stored by the client portal. Updates made in SurroundLab AR are immediately available on the web, and vice versa. If desired, optional configurations to workflow can require 1 - manual review of edits before they are sent to the portal and/or 2 - data coming from the portal before it is filed in SurroundLab AR Order Entry.

This Configuration Checklist is an overview of the SurroundLab AR files used by the Client Portal.

- ✓ Update your Client Payer(s) to use Portal Edits in Client Definition
- ✓ Configure Email Notifications in place of Client Statements using Payer and Client Definition
- ✓ Categorize your Edits and Customize your workflow using the Portal Edit Definition

SurroundLab AR Menus Associated with the Client Portal

- ✓ *Portal Edits – These menus are used to review edit information being sent to and received from the Client Portal, when configured.*
- ✓ *Portal Notice – This menu is used to send notifications to Portal Users assigned to an Edit Category when new edits are ready to work on the Client Portal.*
- ✓ *Submissions – Like the Client Statement process, use the Submissions menu to send email notifications when a new statement is available online.*
- ✓ *Batch Edit Report/Batch Edit – Use this menu to review and apply payments.*
- ✓ *Web Ap Reporting – This management tool allows you to review summary or detailed information sent from the Client Portal to SurroundLab AR.*

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Replacing Client Statements with Email Notifications

Configuring your SurroundLab AR application to replace Client Statements with an Email Notification can be completed with a few easy steps. Email notifications save both time and money associated with printing and mailing Client Statements.

- ✓ *Define a new Output Schedule Number for the form CLI STMT EMAIL in Payer Definition for the Client Payer ID(s). (The Client Payer ID is usually, C, CLI, CLIENT, etc.)*
- ✓ *Assign this Output Schedule Number as the Override Output Schedule in Client Definition*
- ✓ *Confirm an Email Address is present in Client Definition and, if not, obtain and enter one.*

Client Payer Output Schedule Step in Payer Definition

Utilities→ File Maintenance→ Payer Options→ Payer Definition (2,1,19,1)

Clients may prefer to turn off paper statements altogether and receive notifications via the portal when a new statement (invoice) is available online. Since the statements are queued using the Payer Output Schedule in SurroundLab AR, you will need to create an Output Schedule Number for the email notifications and assign it to any Client IDs who prefer to receive notifications by email.

You must first define a new Output Schedule Number (example shows 2).
Complete the Delay Step #1 field as desired.
Complete the Form Name with the CLI STMT EMAIL and Sort By field.
Use the end of screen **[Save]** button before exiting this screen.

```
ADPYR-Co.1                    Payer Definition

 Web Ap Patient Override Schedule Number:
              Allow Demand HCFA To Print?


                              Output Schedules
     Output Schedule Number: 2
             Delay Step #1: M

    Step      Form Name          Sort By              Time To Next Step
    1         CLI STMT EMAIL     INV                         M
    2         CLI STMT EMAIL     INV                         M
    3         CLI STMT EMAIL     INV
    4
    5
    6
    7
    8
    9
    10
    11

            [Save]  [Edit]  [Delete]  [Cancel]  [Exit]
```

You must add this Output Schedule Number to the Override Output Schedules in Client Definition for each Client ID that should receive an email notification in lieu of a printed statement.

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Client Definition Settings

Utilities→ File Maintenance→ Clients→ Client Definition (2,1,1,1)

Assign the Override Output Schedule

To override the current statement Output Schedule for applicable Client IDs, use the Client Definition **Override Output Schedules** section in Client Definition. Select the **Output Schedule Number** that you defined for the **CLI STMT EMAIL** form. Instead of queueing to the usual statement form, these clients will now queue to the CLI STMT EMAIL form.

Like the Client Statement form, you must process this form through Process Submission 1,3,1,1 in order for the Client to be notified of a new invoice is available for review. To automate the processing of the form, use the Schedule Submission menu option at 1,3,1,2.

```
ADCL-Co.1                      Client Definition

  Unkeyed Edit: E Enabled              Nursing Home Edit:
  Fax# NH Letters:                     Fax To NH Contact:


                                 Close Monthly Client Invoice Manually?



             Output Schedule Payer ID: C
          Default ID For Patient Billing:
    Client Invoice Printing Sort Field: RENDER PHY




                          Override Output Schedules
                          Payer ID     Output Schedule #
                     1    C                     2
                     2
                     3
                    [Save]  [Edit]  [Cancel]  [Delete]  [Exit]
```

Enter the Email Address for the Client ID

The Primary email address for the **New Invoice Email Notification** will need to be added to the applicable Client IDs. If there is a Master Client/Sub Client relationship defined and one bill is generated for the Master Client Level, only the Master Client needs to have an email address defined. Located on the Client Billing Address section of Client Definition is the new **Email** field.

```
ADCL-Co.1                      Client Definition
                          Client Billing Address

     Billing Address: 99375 PINE WAY

                City: PARIS
               State: ND    Zip: 48998
               Phone: 111-222-3334
                 Fax: 111-222-3334


               Email: sample@sldsi.com
```

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Select Portal Edits to Override the Missing Information Method

Use the Missing Information Letter Setup section of Client Definition to update the **Portal Edits of MI Letters** field to **P** for Portal Edits. If this field is not completed, SurroundLab AR will default to the MI Letter Transmission Method, found at the top of the same screen. It is not necessary to remove any of the previously defined settings for Missing Information. The Preferred MI Letter Transmission Method and the other Missing Information Letter Setup fields located above the Portal Edits or MI Letters field apply ONLY to MI Letters.

Entering a P in the Portal Edits or MI Letters field overrides the Preferred MI Letter Transmission Method defined above so no MI Letters will be generated.

```
ADCL-Co.1                     Client Definition
                      Missing Information Letter Setup

     Preferred MI letter
    Transmission Method: P Paper

     Physical Name and Address
       ATTN contact name: OFFICE MANAGER
                 Address: 99375 PINE WAY

                    City: PARIS
                   State: ND    Zip: 48998


     Fax information
              Fax Number: 111-222-3332

     Paper information
            Print Device: 5

    Print One Accession per Page? NO
      Portal Edits or MI Letters: P    Portal Edits

              [Save]  [Edit]  [Cancel]  [Delete]  [Exit]
```

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Processing the CLI STMT EMAIL form using Submissions

Billing System→ Submissions & Remittance→ Submissions→ Process Submissions (1,3,1,1)

When a Client Invoice is closed, the invoice will be queued to the form CLI STMT EMAIL for processing. Like other SurroundLab AR forms, this form must be processed in order for the **Email Notifications** to be sent to the Client email addresses. This form does not produce a file output or report; enter **Screen** in the **Output Device** field and select the **Form Name** of **CLI STMT EMAIL**. Choose **[Print]** to process the form and send out the email notifications. The Billed Date will appear in the Invoice Manager Header and the Invoice Notes section. This form may be scheduled to process automatically using the Schedule Submissions menu option at 1,3,1,2.

```
ARFORM-Co.1                    Process Submissions

          Month-End Close Status: Not running


                   Output Device: SCREEN

                       Form Name: CLI STMT EMAIL
                    Reprint Date:
                   Reprint Start:
                     Reprint End:

                 Print Alignment:







                        [Print]   [Edit]   [Exit]
```

Sample of Invoice Notes for Client Statements on the Portal

```
ACSC5-Co.1                        Invoice Notes

 07/01/2016 09:28
 Client statement requested by Web Ap

 07/05/2016 11:02
 Client statement requested by Web Ap

 07/05/2016 11:02
 Client statement requested by Web Ap

 07/08/2016 13:30 Seacoast Demo User
 Invoice closed.

 07/08/2016 15:36 JUDY
 Client statement notification email sent to ▮▮▮▮▮▮▮▮@sldsi.com



              [Next Pg]   [Prev Pg]   [Add]   [Edit]   [Exit]
```

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Shows as Billed and Displays the Date

```
ACSC1-Co.1                    Invoice Manager
      Client: 100        SURGICAL SERVICES        Curr Bal:      9.00
      Invoice: 472729                             Tot Chgs:      9.00
   Invoice Date: 07/01/2016   Orig Invoice Bal:   Debit Adjs:    0.00
   Billing Info: Billed on 07/08/2016             Credit Adjs:   0.00
       Payer: C            Unapplied Cash: 100.00 Tot Paid:      0.00
```

Sample Email Notification

From:	sysadmin@sldsi.com		Sent:	Fri 7/8/2016 3:36 PM
To:	@sldsi.com			
Cc:	@sldsi.com			
Subject:	You have a new Laboratory Service Invoice available for viewing and payment			

454 South Patterson Ave
Santa Barbara, CA 93111
866-809-9048

Client Name: SURGICAL SERVICES
Account Number: 100

Dear SURGICAL SERVICES,

You have a new Laboratory Invoice requiring your attention. Please click on the link below to view your bill online via our Client Portal.

Account Login

Just click on the Account Login link above to get started. You will need your user name and password to login. Seacoast Laboratory Data Systems will never share or sell your information, for any reason.

For questions or comments please phone us at 1.866.809.9048 Monday - Friday from 9:00 am to 5:30 pm.

Thank you for your patronage.

Seacoast Laboratory Data Systems, Inc. Billing Customer Service

Please do not reply to this email, as this is an automated mailbox that does not accept incoming mail.

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Defining Edit Categories for Client Portal User Assignment

Edit Category Definition

Utilities→ Configuration Maintenance→ System Codes→ Edit Category Definition (2,2,8,8)

You will use two screens to establish categories for SurroundLab AR Order Entry Edits. Edit categories can be assigned to a portal user. Only those categories assigned to the user will be viewable to the user on the web portal. If needed, a user can have access to all edit categories. An email will be sent when new edits in the assigned category are available to work on the Client Portal. Edits can be filtered by category on the Client Portal.

Missing Info Edits visible to User:
☑ Patient Demographics
☑ Diagnosis Related Edits
☑ Insurance Information
☑ Medicare A or B Eligibility
☑ Physician Information NPI
☑ Responsible Party Information

First, the **Edit Category Definition** screen is used to create categories for the edits. Categories are used to group similar Order Entry Edits together. For example, you may want to group edits for missing information related to Patient Date of Birth, Sex, Address, etc. as demographic edits. The provider's office might have different team members working diagnosis related edits than demographic edits.

Complete these required fields and select **[Save]** from the end of screen buttons.

Edit Category ID: Enter a new Edit Category ID, an existing Edit Category ID, or "/L" for a list.

Description: Enter a description, up to 40 characters.

```
ADEDCAT-Co.1                    Edit Category Definition
        Edit Category ID: RESP

          Description: Responsible Party Information
```
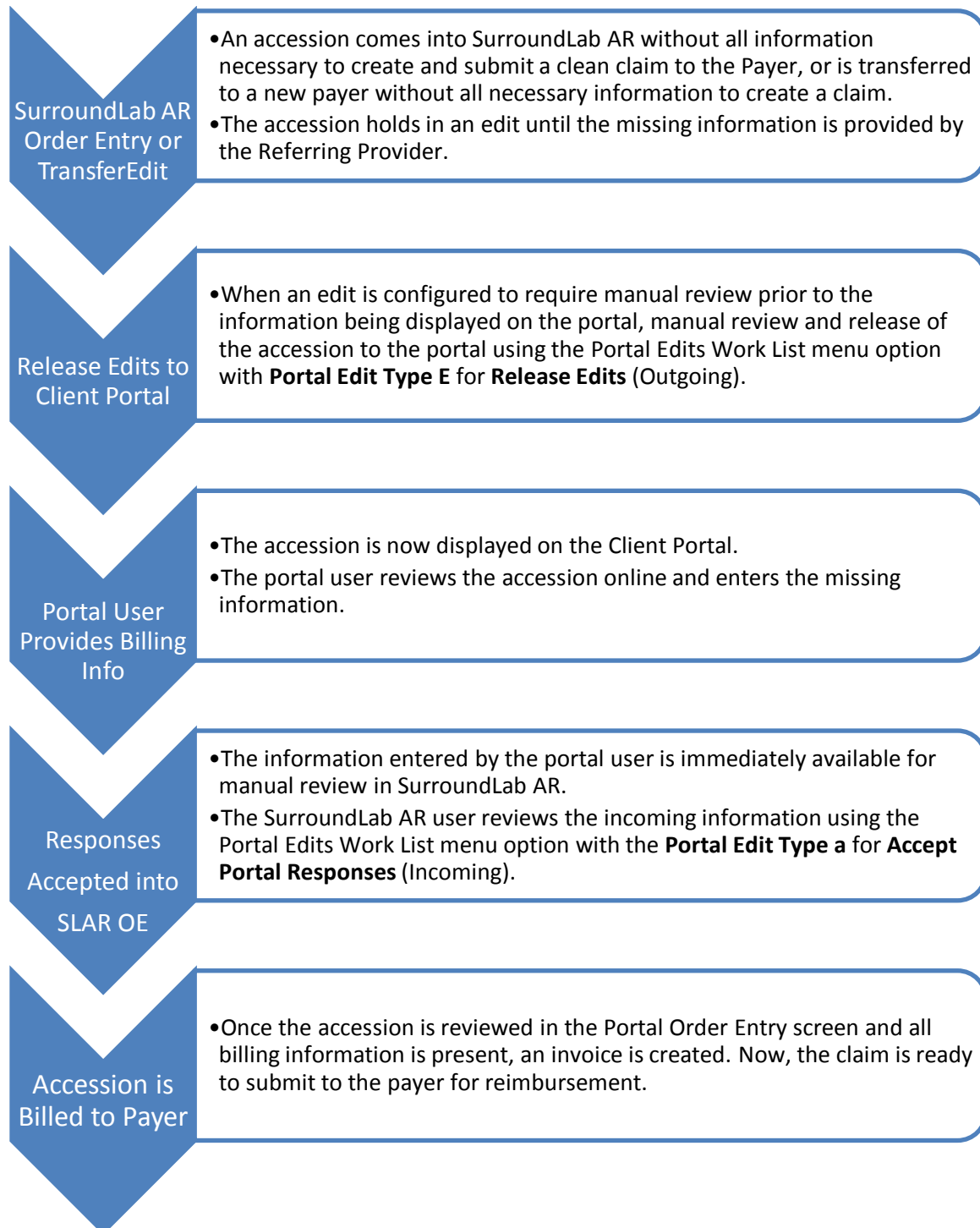
The second screen you need to complete is the **Portal Edit Definition.** In this screen, you will define categories and design a workflow for your edits.

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Establishing a Workflow for the Client Portal Edits

SurroundLab AR Order Entry Edits are displayed on the Client Portal in real-time. However, you may choose to insert controls for specific Client IDs and Edits that will force accessions to be manually reviewed. Below is an outline of the Edit Workflow when outgoing and incoming controls are defined. Use the **Portal Edit Definition** menu option to insert these controls by Client ID and specific Edit.

Portal Edits Workflow with SurroundLab AR User Controls

SurroundLab AR Order Entry or TransferEdit
- An accession comes into SurroundLab AR without all information necessary to create and submit a clean claim to the Payer, or is transferred to a new payer without all necessary information to create a claim.
- The accession holds in an edit until the missing information is provided by the Referring Provider.

Release Edits to Client Portal
- When an edit is configured to require manual review prior to the information being displayed on the portal, manual review and release of the accession to the portal using the Portal Edits Work List menu option with **Portal Edit Type E** for **Release Edits** (Outgoing).

Portal User Provides Billing Info
- The accession is now displayed on the Client Portal.
- The portal user reviews the accession online and enters the missing information.

Responses Accepted into SLAR OE
- The information entered by the portal user is immediately available for manual review in SurroundLab AR.
- The SurroundLab AR user reviews the incoming information using the Portal Edits Work List menu option with the **Portal Edit Type a** for **Accept Portal Responses** (Incoming).

Accession is Billed to Payer
- Once the accession is reviewed in the Portal Order Entry screen and all billing information is present, an invoice is created. Now, the claim is ready to submit to the payer for reimbursement.

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Portal Edit Definition
Utilities→ Configuration Maintenance→ System Codes→ Portal Edit Definition (2,2,8,9)

The **Portal Edit Definition** screen displays a line for each edit defined with an **External Edit Type** in Company Definition. See the Set Edit Type for Order Entry Demographics panel of **Company Definition** (2,2,4,1) to change an Edit Type from External to Internal if an edit can be resolved in-house and should not be sent to a provider's office for resolution.

By Client, you will determine the category and workflow for each of the edits. This screen offers a copy feature to lessen the manual entry required. If a new edit is created through a SurroundLab AR build or as a custom edit, the Portal Definition screen will require an update for the new fields for each client. *Note: Remember to set these fields as part of your process when you create a new Client ID.*

Complete the fields below and select **[Save]** from the end of screen buttons.

Client ID: Enter a valid Client ID, * for All, or /L for a list. The (*) All option is the default definition for all Clients not specified in the Portal Edit Definition.

Copy From Client ID: You may copy a Portal Edit Definition from another Client ID. Enter a Client ID or /L for list. A previously defined set of Edits for a client may be copied to a new client if desired.

Edit Category: Enter the Edit Category ID or /L for a list. This refers to the group of edits you previously defined in Edit Category Definition, i.e. DEMO, RESP, DIAG, MEDNEC, INS, etc.

Review Outgoing Edit? Enter YES if the portal edit needs to be internally reviewed before the edit is sent to the Client Portal. Otherwise, enter NO. *You have the option to review accessions with edits prior to their release to the Client Portal.*

Review Incoming Edit? Enter YES if the information that was entered in the portal for the edit can be automatically filed in SurroundLab AR. Otherwise, enter NO. *You have the option to review responses provided by the Client from the Client Portal before they are filed in SurroundLab AR.*

```
ADEDP-Co.1                      Portal Edit Definition

          Client ID: 100          Lisa's Test Client

Copy From Client ID: |          |


                                            Review    Review
                                    Edit    Outgoing  Incoming
Edit                                Category Edit?    Edit?
Missing DX (1)                      DIAG     YES       NO
Missing Patient Street Addr         DEMO     NO        YES
Missing Patient City                DEMO     NO        YES
Missing Patient Birth Date          DEMO     NO        YES
Missing PTFIRST                     DEMO     NO        NO
Missing Patient Home Phone          DEMO     NO        NO
Missing PTLAST                      DEMO     NO        NO
Missing Patient Sex                 DEMO     NO        NO
Missing Patient State               DEMO     NO        YES
Missing Patient ZIP Code            DEMO     NO        YES
Missing Phys Name                   PHY      NO        NO
Missing Reln to RP                  INS      NO        NO
Missing Resp Party Str. Addr      + DEMO     NO        YES
```

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Managing Data Exchange: SurroundLab AR ←→ Client Portal

The Portal Edit Work List is designed for a SurroundLab AR user to manage the flow of data to and from the Client Portal using the workflow you defined in the Portal Edit Definition (2,2,8,9) to determine which external edits require incoming and outgoing review.

The Portal Work List should be worked daily, at minimum, to effectively manage the timely transfer of data to and from the Client Portal.

There are two **Portal Edit Types**:

E   Release Edits to Portal (Outgoing) or SurroundLab AR → Client Portal
Purpose: To review Accession Order Entry or Transfer Queue edit details before they are released to the web portal. If the external edit is defined with **NO** in the **Review Outgoing Edit** field then it will not appear on a list when you run the **Release Edits to Portal** option in the Portal Edits Work List. These edits will be automatically released to the web portal application.

A   Accept Portal Responses into OE (Incoming) or SurroundLab AR ← Client Portal
Purpose: To review the data sent to SurroundLab AR from the web portal prior to being filed in SurroundLab AR. If the external edit is defined as **NO** for **Review Incoming Edit**, it will not appear on a list when you run the **Accept Portal Responses into OE** option in the Portal Edits Work List. The data entered online will be automatically filed in SurroundLab AR to resolve the Order Entry or Transfer edit. If all edits have been resolved, the accession will automatically create an invoice for billing. **Exception:** these will automatically process in SurroundLab AR unless an edit and/or Portal Notes on the same accession requires review and causes the accession to hit the Accept Portal Responses into OE (Incoming) or SurroundLab AR list.

Portal Edits Work List
Billing System→ Edits→ Missing Information→ MI Client Portal→ Portal Edits Work List (1,2,2,2,2)

The **Portal Edits** are reviewed in a work list format using the Portal Edits Work List menu option. If you configured the external edits to require a review, you will need to use one or both of the following Portal Edit Types in the **Portal Edits Work List**. If SurroundLab AR has not been configured to require review then this option is not necessary and the edit information will flow freely to and from the Client Portal. *Refer back to the workflow when using the Portal Edits menu.*

```
┌──────SurroundLab AR──────┐
│ 1 - Billing System       │
│   ┌────────Billing System────────┐
│   │ 1 - Order Entry              │
│   │   ┌────────Edits────────┐
│   │   │ 1 - Edit Reports    │
│   │   │   ┌──────Missing Information──────┐
│   │   │   │ 1 - MI Letters                │
│   │   │   │   ┌──────MI Client Portal──────┐
│   │   │   │   │ 1 - Portal Notice          │
│   │   │   │   │ 2 - Portal Edits Work List │
│   │   │   │   │ 99 - Exit                  │
│   │   │ 11 -│ 100 - Logout               │
│   │   │ 99 -└────────────────────────────┘
│   │ 100 - Logout
```

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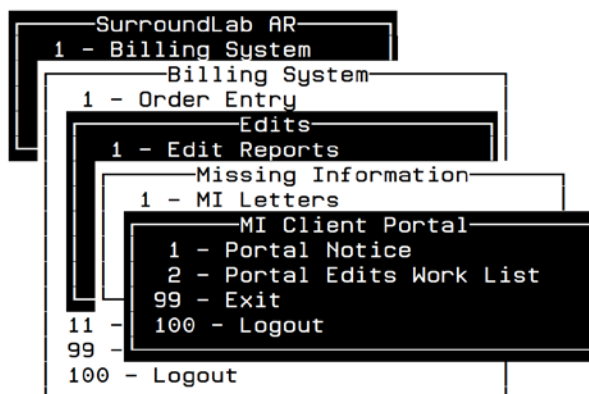
Portal Edits Work List Selection Screen

Complete the following fields to build your Portal Edits Work List.

Portal Edit Type: Enter E-Release Edits to Portal (Outgoing) or A-Accept Portal Responses in OE (Incoming). The Release Edits to Portal (Outgoing) option will allow you to review the Edit before it is sent to the Web Portal. The Accept Portal Responses in OE (Incoming) option will allow you to review the data entered on the Web Portal by the client before it is filed in Order Entry.

```
──────────────────Select Entry──────────────────
E     Release Edits to Portal (Outgoing)
A     Accept Portal Responses into OE (Incoming)
```

Client ID(s): Enter Client ID(s), /L to select from a list of Client ID(s), or an * for all Clients. Multiples can be selected.

Payer ID(s): Enter a Payer ID(s), /L to select from a list of Payer ID(s), or an * for all Payers. Multiples can be selected.

Aged Category: Enter an Aged Category, /L to select from a list of Aged Categories, or * for all Categories.

Edit Reason(s): Enter an Edit Reason(s), /L to select from a list of Edit Reason(s), or an * for all Edit Reasons. Multiples can be selected.

Ordering Location(s): Enter an Ordering Location(s), /L to select from a list of Ordering Locations(s), or an * for all Ordering Locations. Multiples can be selected.

Sort By: Enter an (A) for Accession, (C) for Client, and (L) for Ordering Location. Enter /L to select from a list.

Select **[Process]** to create the Work List, **[Edit]** to make changes to the selection criteria, or **[Exit]** to exit without creating the Work List.

```
ANPEDW-Co.1                  Portal Edits Work List

       Portal Edit Type: A   Accept Portal Responses into OE (Incoming)

          Client ID(s): *         ALL


            Payer ID(s): *         ALL


         Aged Category: *    ALL
         Edit Reason(s): *



   Ordering Location(s): *         ALL


              Sort By: A   Accession



                   [Process]  [Edit]  [Exit]
```

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Release Edits to Portal (Outgoing)

If you selected the Portal Edit Type of **E** to **Release Edits to Portal**, the list of accessions with edits pending release to the Client Portal will be displayed on your screen. If needed, use your up and down arrow keys to highlight a specific accession. Press **[Enter]** on your keyboard to select an accession. Access the end of screen buttons by entering a "/" and, then, pressing **[Enter]**. If you select the **[Print]** option, a screen will display for you to enter the Output Device. You may choose from a list of defined printers or to print to a file. Select **[Edit]** to return to the list of accessions. Select **[Exit]** to return to the Portal Edits Work List selection screen.

Portal Edits Work List - Accession List Screen

```
ANPEL-Co.1                  Portal Edits Work List

                      Select Accession to Work
Accession        DOS         Patient Name            Client      Payer
A000190          10/11/2018  DEMO PATIENT            100         BC
A000193          10/18/2018  PATIENT TEST           100         MC

















                       [Print]   [Edit]   [Exit]
```

The Portal Billing Order Entry screen is displayed so you can review the accession and access the Portal Edits. The selected accession is displayed with the original Order Entry details. The Portal Edits Work List is only for review; changes cannot be made to the accession in this screen.

Use the end of screen **[Portal Edits]** button to view a list of edits to be sent to the Client Portal for this accession. Or, you may use the **Control + Z** command while the cursor is on a Test Ordered line to access the additional function options. You will be prompted to select a function. Choose Portal Edits to view details.

Sample of Select Function Box

```
┌─Select Function─┐
│ OE Detail       │
│ Portal Edits    │
│ Cancel          │
└─────────────────┘
```

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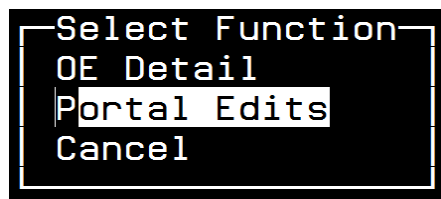
The Portal Edits pending release to the portal are displayed for review. Review the edits and Order Entry data as needed.

```
                        Portal Edits
      ┌───────────────────────────────────────────────────────┐
      │ Edit                                                   │
      │ DX (1) missing                                         │
      │ Reln to RP missing                                     │
      │ Resp Party Str. Addr missing                           │
      │ Resp Party City missing                                │
      │ Resp Party Frst Name missing                           │
      │ Resp Party Last Name missing                           │
      │ Resp Party State missing                          +    │
      └───────────────────────────────────────────────────────┘
```

When you have reviewed the information for the accession, use the Portal Edits button at the end of the screen to access the Portal Edits Release screen to release the accession to the portal.

Portal Edits Work List – Release Edits (Outgoing)

The Portal Edits Release screen displays five columns with distinct purposes.

- ✓ **Review Outgoing Edit?:** To let you know if the edit is defined for review prior to release to the client portal.
- ✓ **Review Incoming Edit?:** To let you know if the edit is defined for review and accept the portal responses prior to filing in SurroundLab AR.
- ✓ **Release Edit?:** Enter YES if you want to release this edit to the portal or NO.
- ✓ **Client Submitted Edit?:** To communicate that a Client Portal user has submitted data for a specific edit. It is possible for some edits to be released and resolved using this option.
- ✓ **Accept Edit?:** This field will only be accessible when the Accept Portal Responses Work List has been created. When working this type of work list, enter YES to accept the response(s) from the portal user. Keep reading for more information on this process.

The cursor will default to the **Release Edit?** column for the edits which require release before being displayed on the web portal. Enter "Y" for Yes and "N" for No.

ANPELE-Co.1	Portal Edits				
	Review Outgoing	Review Incoming	Release	Client Submitted	Accept
Edit	Edit?	Edit?	Edit?	Edit?	Edit?
DX (1) missing	YES	YES	YES	NO	
Reln to RP missing	NO	YES		NO	
Resp Party Str. Addr missing	NO	YES		NO	
Resp Party City missing	NO	YES		NO	
Resp Party Frst Name missing	NO	YES		NO	
Resp Party Last Name missing	NO	NO		NO	
Resp Party State missing	NO	YES		NO	
Resp Party Zip missing	NO	YES		NO	
Insured Policy Contract# missing	NO	NO		NO	

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Only the edits marked **YES** in the **Review Outgoing Edit?** field require a response. Per the file definition, the other edits do not require a response, meaning these are automatically released to the portal.

```
ANPELE-Co.1                    Portal Edits

                     Review      Review           Client
                     Outgoing    Incoming  Release Submitted Accept
Edit                 Edit?       Edit?     Edit?   Edit?     Edit?
DX (1) missing        YES         YES       YES      NO
Reln to RP missing    NO          YES                NO
Resp Party Str. Addr missing  NO  YES                NO
Resp Party City missing   NO      YES                NO
Resp Party Frst Name missing  NO  YES                NO
Resp Party Last Name missing  NO  NO                 NO
Resp Party State missing  NO      YES                NO
Resp Party Zip missing    NO      YES                NO
Insured Policy Contract# missing  NO  NO             NO




                    [Save]   [Edit]   [Cancel]   [Exit]
```

Once your responses have been entered, select **[Save]** to release the edit to the web portal. A pop-up box will display, if the accession is deemed "worked" select "Mark Accn# NNNNNN as worked". You could also choose "Leave as unworked" to keep the accession on the work list for review later.

```
C680EAPI-Co.1               Portal Billing Order Entry

  Accession: A000190         2) Client Id: 100      SURGICAL SERVICES
  3) Pat ID: DEMOPAT      ) Ordering Location: LAB
  5) Phys Id: A0000001   6) Phys Name: ITSA PAIN
     7) DOS: 10/11/2018

  8) Patient Last Name: PATIENT      First: DEMO           MI:
            11) Sex: M          12) DOB: 10/30/1976
               ┌─Mark accession as worked?─┐
  Primary Payer: BC  │ Mark Accn# A000190 as worked. │  3rd Payer:
                     │ Leave as unworked.            │
  DX (1)      (2)    └───────────────────────────────┘ (5)      (6)
```

An * will be added after the Payer column if the "Mark Accn# NNNNN as worked" has been selected. Use the arrow keys to select the next accession to be reviewed and released. Complete your work list of accessions. Continue working accessions until your work list has been completed.

```
ANPEL-Co.1                   Portal Edits Work List

                   Select Accession to Work

Accession      DOS          Patient Name      Client    Payer
A000190        10/11/2018   PATIENT,DEMO      100       BC       *
A000193        10/18/2018   PATIENT TEST      100       MC
```

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Accept Portal Responses in OE (Incoming)

Use the same criteria in the selection screen to create the Accept Portal Responses into OE (Incoming) Work List. However, instead of entering an R in the **Portal Edit Type** field, enter **A** for Incoming Edits. Using the Incoming option will allow you to review the data entered on the portal by the client before being accepted into Order Entry.

```
─────────────────────Select Entry──────────────────────
│E     Release Edits to Portal (Outgoing)               │
│A     Accept Portal Responses into OE (Incoming)       │
────────────────────────────────────────────────────────
```

Use the **[Process]** button at the end of the selection screen to create your list. Select an accession from the list by using the arrow keys for review of the data entered on the web portal to resolve the edits.

Portal Edits Work List – Accept Portal Responses, Warning for Portal Notes

```
ANPEL-Co.1                  Portal Edits Work List

                      Select Accession to Work
Accession       DOS          Patient Name        Client    Payer
A000036         12/08/2017   MICKY TEST          100       MC
A000190         10/11/2018   DEMO PATIENT        100       BC








                    [Print]   [Edit]   [Exit]
```

Scenarios exist where a response is sent from the portal user that requires an additional effort in SurroundLab AR to process the response. For example, If a portal user selects "No other Diagnosis available" in response to a medical necessity edit or sends a ten-digit NPI which not previously defined in SurroundLab AR, a SurroundLab AR user will see a pop-up box **Please review Portal Notes**.

```
──────────────WARNING──────────────
│ Please review the Portal Notes.  │
│                                  │
│ Press ENTER to continue          │
────────────────────────────────────
```

This is an informational box to tell the SurroundLab AR user that additional work is necessary to clear the edit. For example, you may be required to mark an ABN as yes or no, override the Missing Diagnosis

or Medical Necessity edit, or define a new NPI. To review the Portal Notes, press the **Control** + **Z** keys to select from the additional function options. Arrow down to highlight **Portal Notes** and press **[Enter]**. To access a list of Portal Edits select the Portal Edits option.

Samples of Select Function Box and Portal Notes Message

```
┌─Select Function─┐
│ OE Detail        │
│ Portal Edits     │
│ Portal Notes     │
│ Cancel           │
└──────────────────┘
```

```
                        Portal Notes
    Note
    No Other Diagnosis Codes Available




                        [Exit]
```
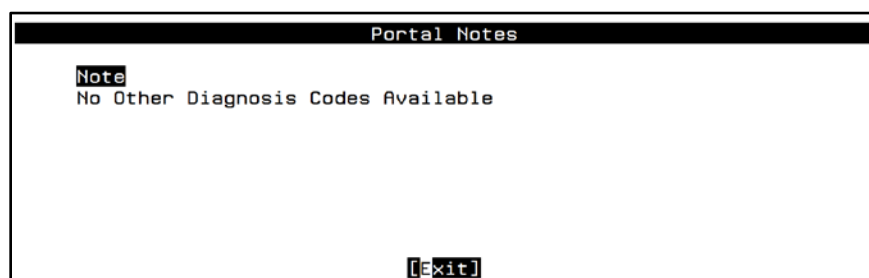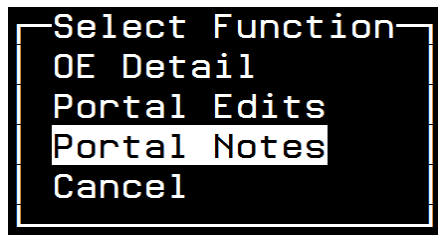
Take the necessary action to complete the SurroundLab AR side resolution before **Accepting** the edit response**. If you do not complete any necessary actions before you accept the response, the edit will be returned back to the portal.** Press **[Enter]** to return to the Order Entry screen. Information entered on the portal is displayed in the appropriate fields. Choose **[Portal Edits]** from the end of screen buttons to accept the edits for this accession.

```
ANPELE-Co.1                      Portal Edits
```

Edit	Review Outgoing Edit?	Review Incoming Edit?	Release Edit?	Client Submitted Edit?	Accept Edit?
DX (1) missing	YES	YES		NO	
Reln to RP missing	NO	YES		YES	YES
Resp Party Str. Addr missing	NO	YES		NO	
Resp Party City missing	NO	YES		NO	
Resp Party Frst Name missing	NO	YES		YES	
Resp Party Last Name missing	NO	NO		YES	YES
Resp Party State missing	NO	YES		NO	
Resp Party Zip missing	NO	YES		NO	
Insured Policy Contract# missing	NO	NO		NO	

```
              [Save]   [Edit]   [Cancel]   [Exit]
```

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Per the file definition, some edits do not require a response, meaning the responses are automatically accepted from the portal. These appear with YES as the default response in the Accept Edit field. SurroundLab AR users are allowed to change this default response to NO, if necessary. Enter **NO** to discard the data sent from the portal for the edit. **If you enter NO in this field, the edit will return to the portal to be re-worked by a portal user.**

All edits with NO in the Accept Edit field require manual review and a **YES** response to be entered in the **Accept Edit** field to accept the provider response into SurroundLab AR. After completing the Accept Edits response field(s), select the **[Save]** button to save your responses.

A pop-up box appears so to mark the accession as worked. If the accession needs no further review, mark the accession as worked. If you marked an accession as worked, an asterisk will be placed beside that line item on the work list. Use the arrow key to select the next accession to be reviewed and filed.

```
┌──────────Mark accession as worked?──────────┐
│ Mark Accn# A000036 as worked.                │
│ Leave as unworked.                           │
└──────────────────────────────────────────────┘
```

You may also choose to accept the edit responses to be saved and also select Leave as unworked. In that case, the information will not yet be filed into the Order Entry Screen.

```
ANPEL-Co.1                    Portal Edits Work List

                        Select Accession to Work

Accession        DOS          Patient Name             Client    Payer
A000036          12/08/2017   MICKY TEST               100       MC      *
A000190          10/11/2018   DEMO PATIENT             100       BC




                        [Print]  [Edit]  [Exit]
```

Once you have completed your work list, access the end of screen buttons by entering a "/" and, then, pressing **[Enter]**. Select either **[Print], [Edit],** or **[Exit]**. If you select the **[Print]** option, a screen will display for you to enter the Output Device. You may choose from a list of defined printers or to print to a file. Select **[Edit]** to return to the list of accessions. Select **[Exit]** to return to the Portal Edits Work List selection screen.

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Send Email Notices of New Edits to Client Portal Users

Portal Notice

Billing System→ Edits→ Missing Information→ MI Client Portal→ Portal Notice (1,2,2,2,1)

A portal user can be notified by email when new edits are available for review. For this to occur, the portal user must be assigned at least one Edit Category. This process uses the email address assigned to the Portal User ID for the notification email.

The **Portal Notice** screen was created to send these email notifications. Make your selection in the Client ID field and select **[Print]** to send the notices.

Client(s): Enter a single Client ID, /L to select from a list, or an asterisk (*) to select All Clients.

```
AREDEML-Co.1                      Portal Notice


            Client(s): *              ALL

















                        [Print]   [Edit]   [Exit]
```

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Sample of Email Notice of New Edits available for Review

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195 New Hampshire Ave

Portsmouth, NH 03801

603.431.4114

Client Name: Sample Client

Account Number: CL12345

Dear Sample Client,

You have new information requests requiring your attention. Please click on the link below to view the information requests online via our Client Portal. Billing cannot be performed until the information requests have been completed.

Account Login

Just click on the Account Login link above to get started. You will need your user name and password to login. Seacoast Laboratory will never share or sell your information, for any reason.

For questions or comments please phone us at 1.866.000.0000 Monday - Friday from 9:00 am to 5:30 pm.

Thank you for your patronage.

Seacoast Laboratory

Please do not reply to this email, as this is an automated mailbox that does not accept incoming mail.

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Client Web AP Usage Report

Billing System→ Management Reports→ Client Web AP Usage Report (1,8,50)

For the date range entered, the **Client Web Ap Usage Report** provides a history of data entered via the Client Portal. The Summary version of this report provides a count of each web event (entering comments, payments, edit data) taken on the portal for a specific date range, client. The Detail version provides more specific details for the Client Portal events.

Complete the fields below and select **[Print]** from the end of screen buttons.

Output Device: Select from a list of previously defined devices by entering /L. This report can be printed to a screen by entering SCREEN or it can print to a .txt file by entering FILE.

Start Date: Enter the Start Date in the format: MM/DD/YYYY. This start date will be the beginning range from which to gather data for the report.

End Date: Enter the End Date in the format: MM/DD/YYYY. This end date will be the ending range from which to gather data for the report.

Client(s): Enter valid Client ID(s), /L to select from a list, or * for ALL Client IDs.

Accession(s): Enter valid Accession Number (s), * for All, or /L for a list of all accessions with submitted portal edits.

Event Type(s): Enter * for ALL Events, C for Invoice Comments, E for Edits, N for Edit Notes, or P for Payments.

Detail or Summary: Enter D for Detail or S for Summary.

Client Web AP Usage Report – Selection Screen

```
ARAPIUSC-Co.1                  Client Web AP Usage Report

            Output Device: SCREEN

              Start Date: 03/22/2016

                End Date: 06/20/2016

                Client(s): *           ALL
                                                    ┌────Select Entry────┐
                                                    │*    All entries     │
                                                    │C    Invoice Comments│
             Accession(s): *           ALL          │E    Edits           │
                                                    │N    Edits Notes     │
             Event Type(s): /1                      │P    Payments        │
                                                    └─────────────────────┘


          Detail or Summary:
```

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Client Web AP Usage Report – Summary Report Sample

```
User: JLH                      Client Web AP Summary Report               06/20/2016
Page: 1                     Seacoast Laboratory Data Systems, Inc.         11:18 AM
                                 From 03/22/16 to 06/20/16
                                      Client(s): ALL
                                    Accession(s): ALL
                                    Event Type(s): ALL


Count          Action
-------        ---------------------------------------------------------------

    28         Accession Comment

     6         Payment posted

     3         Edits posted

     3         Edit Notes posted
<CR> to continue: █
```

Client Web AP Usage Report – Detail Report Sample

```
User: JLH                        Client Web AP Detail Report              06/20/2016
Page: 1                      Seacoast Laboratory Data Systems, Inc.        11:18 AM
                                 From 03/22/16 to 06/20/16
                                      Client(s): ALL
                                    Accession(s): ALL
                                    Event Type(s): ALL


Account     Invoice    Date      Action
-------     -------    ----      ------------------------------------------------
100         472678     05/05/2016  Web Ap client invoice comment - accession 31102190
      Web Ap admin System Administrator Comment: jesstest
            472678     05/17/2016  Web Ap client payment posted
            472678     05/19/2016  Web Ap client payment posted
            472678     05/19/2016  Web Ap client invoice comment - accession A0000018
      Web Ap admin System Administrator Comment: TEST Comment
            472678     05/20/2016  Web Ap client invoice comment - accession 31102190
      Web Ap lrtest1 LRTest1 Comment:
            472678     05/24/2016
```

```
User: JLH                        Client Web AP Detail Report              11/23/2018
Page: 1                      Seacoast Laboratory Data Systems, Inc.        4:05 PM
                                 From 08/15/18 to 11/23/18
                                      Client(s): ALL
                                    Accession(s): ALL
                                    Event Type(s): ALL


Account     Invoice    Date      Action
-------     -------    ----      ------------------------------------------------
100         1909       08/16/2018  Web Ap client payment posted
            1910       08/23/2018  Web Ap client payment posted
            2146       10/08/2018  Web Ap client invoice comment - accession A001942
      Web Ap Jparkinssub Jess Hodges Comment: pt has part a
SLDSI       1923       08/23/2018  Web Ap client payment posted
<CR> to continue: █
```

Note: Review the report often to view the comments sent from the provider's office.

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```
User: JLH                           Client Web AP Detail Report                    11/23/2018
Page: 3                          Seacoast Laboratory Data Systems, Inc.              4:24 PM
                                        From 08/15/18 to 11/23/18
                                             Client(s): ALL
                                          Accession(s): ALL
                                          Event Type(s): ALL


Audit : Wednesday 10/03/2018 at 1:14:38 PM
User  : jparkins - Jessica Parkins
Action: UPDATE
Client: 100
Accession: A001818


    Field information changed:
        Field: DX (2)
              OLD=
              NEW=R50.81
        Field: NOTES API
              NEW=No Other Diagnosis Codes Available


------------------------------------------------------------------------------
<CR> to continue: █
```

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Logging into the Client Portal

To log in, access the portal using the designated URL assigned by your IT department. Once the portal is set up for use, the temporary test URL will be replaced with the formal URL selected (and licensed with SSL) by the laboratory.

The Account Login screen is displayed. Enter your **User ID** and **Password** then click on the **Login** button.

Time Saving Tip:

*Adding this site as a "**Favorite**" allows you to access the Client Portal more quickly in the future. Next time you visit the Client Portal, just click on it in your Favorites.*

Failed Login Attempt Message

When a user tries to access the Client Portal using either an invalid User ID and/or Password, the message "**The User ID or Password provided is incorrect."** will be displayed in red on the Login Page. *The user must have valid credentials to enter the Client Portal.*

Exploring the Client Portal Pages

The Client Portal for SurroundLab AR offers multiple pages of functionality. When you log into the Client Portal, you are defaulted into the Activity page. The selected page is displayed in **bold**. The additional pages are also displayed in the banner.
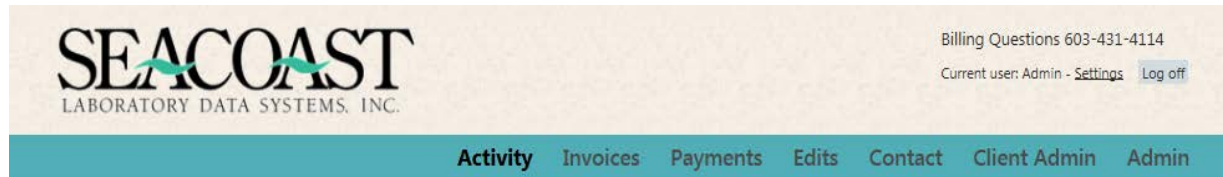
The Client Portal is a one-stop shop for reviewing your current month's open invoice charges prior to billing, reviewing closed invoices, and paying your outstanding account balances in a quick, convenient online application. Select from one of the page options to perform the functionality offered there.

❖ *Activity: View and/or export a list of accessions on the current monthly invoice prior to billing*

❖ *Invoices: View and/or export a prior billing invoice*

❖ *Payments: Pay a closed statement(invoice) balance online*

❖ *Edits: Resolve Missing Information Edits, such as missing insurance, demographic, or diagnosis, online instead of receiving faxes*

❖ *Contact: Displays the contact information for your organization*

❖ *Client Admin (Limited to Client Admin User IDs ONLY)*
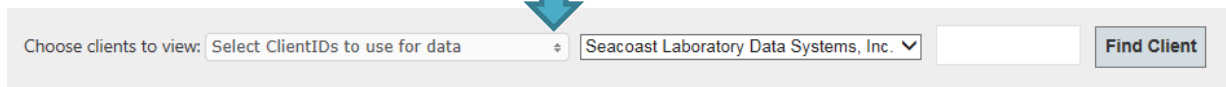
Activity Page

The **Activity** page is designed to provide you with a method to review the charges on a current month's invoice in Invoice Manager prior to billing. In other words, this is the open invoice in SurroundLab AR. All closed invoices will appear under the next page, **Invoices,** for review.

Choosing Clients to View

If your User ID allows you to access more than one Client ID, use the drop down box to select a specific Client ID or multiple Client IDs.

You may select Check all, Uncheck all, or manually click on the box to the right of the Client ID to check/uncheck to customize your selection(s). Data for the selected Client ID(s) will be displayed in the **grid.**

Current Monthly Activity:

This invoice shows your current utilization for this period - **THIS IS NOT A BILL**

Activity for 100;120;200;225

Client	Invoice	Opened Date	Total Charges	Current Balance	PDF	Excel
120	472727	06/20/2016	$21.50	$21.50	PDF	Excel
225	472726	06/20/2016	$6.00	$6.00	PDF	Excel
200	472725	06/20/2016	$55.00	$55.00	PDF	Excel
100	472723	06/15/2016	$15.50	$15.50	PDF	Excel

You may also type one Client ID in the box to the right of the **Find Client** button and click **Find Client** to view only information for the Client ID you entered.

Current Monthly Activity:

This invoice shows your current utilization for this period - **THIS IS NOT A BILL**

Activity for 100;120;200;225

Client	Invoice	Opened Date	Total Charges	Current Balance	PDF	Excel
100	472723	06/15/2016	$11.50	$11.50	PDF	Excel

Page 1 of 1   10 ∨   View 1 - 1 of 1

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View the Current Monthly Activity in an MS Excel or PDF format

Click on the PDF or the Excel link to view the accession details which have been added to the open invoice as of the present date and time.

Current Monthly Activity:

This invoice shows your current utilization for this period - **THIS IS NOT A BILL**

Activity for 100;120;200;225

Client	Invoice	Opened Date	Total Charges	Current Balance	PDF	Excel
120	472727	06/20/2016	$21.50	$21.50	PDF	Excel
225	472726	06/20/2016	$6.00	$6.00	PDF	Excel
200	472725	06/20/2016	$55.00	$55.00	PDF	Excel
100	472723	06/15/2016	$15.50	$15.50	PDF	Excel

Page 1   of 1   10   View 1 - 4 of 4

Sample of MS Excel Selection

	A	B	C	D	E	F	G	H	I	J
1	THIS IS NOT A BILL		THIS IS NOT A BILL			THIS IS NOT A BILL				
2										
3	Client Name				Billing Date					
4	SURGICAL SERVICES	100			6/17/2016					
5	99375 PINE WAY									
6	PARIS, ND 48998									
7										
8	Payments Received:				0					
9	Patient Transactions (Current Month's Charges):				0					
10	Adjustments/Refunds:				0					
11										
12	472723 Due:				11.5					
13										
14	Remit Payment to:									
15		Seacoast Laboratory Data Systems, Inc.								
16										
17										
18										
19	Date of service	Patient Name	Accession	Date of Birth	Bill Code	Test Description	CPT	Qty	Total Amount	
20	10/9/2015	TEST, APAT	A000032	12/3/1961	2001	SODIUM, S	84295	1	2	
21	10/9/2015	TEST, APAT	A000032	12/3/1961	2002	POTASSIUM, S	84132	1	2	
22	10/9/2015	TEST, APAT	A000032	12/3/1961	2003	CHLORIDE, SERUM	82435	1	2	
23	10/9/2015	TEST, APAT	A000032	12/3/1961	2026	CO2	82374	1	2	
24	10/9/2015	TEST, APAT	A000032	12/3/1961	7028	CBC w/PLT	85027	1	3.5	
25								Total	11.5	
26										

Note: Print or Save this information as needed using the File menu.

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Sample of PDF Selection

Note: Print or Save this information as needed using the File menu.

Invoices Page

The **Invoices** page displays all closed invoices regardless of whether the invoice has an open balance or a zero balance. You may use the PDF and Excel links to view and/or export charges from a prior closed invoice, or billing statement.

| | Activity | **Invoices** | Payments | Edits | Contact | Client Admin | Admin |

Choose clients to view: 100, 120, 200, 225 ⬍ Seacoast Laboratory Data Systems, Inc. ⌄ | | **Find Client**

Closed Invoices:

The invoices below with balances due require payment.

Closed Invoices for 100;120;200;225

View	Client	Invoice	Opened Date	Closed Date	Total Charges	Current Balance	PDF	Excel
View	100	472719	05/05/2016	06/01/2016	$61.50	$61.50	PDF	Excel
View	100	472718	04/26/2016	05/02/2016	$7.50	$3.50	PDF	Excel
View	100	472678	09/13/2012	09/14/2012	$58.50	$28.50	PDF	Excel
View	100	472714	01/25/2016	02/01/2016	$5.50	$0.00	PDF	Excel
View	100	472700	12/18/2013	10/27/2015	$87.50	$0.00	PDF	Excel

|◄ ◄◄ Page 1 | of 10 ►► ►| 5 ⌄ | View 1 - 5 of 46

Total Outstanding Balance: $93.50

Click on the **View** button to view the Service Dates, Patient Names, Dates of Birth, number of Tests, and Accession Total Charges for each Accession that was billed under this invoice.

To submit comments on an Accession in this invoice, click the EDIT button for a given record.

Details for Invoice #472719 at 100

DOS ⬍	Patient Name	Accession	DOB	# of Tests	Amount	Comments
mm/dd/yyyy	search by name	search by #				
05/05/2016	HODGES, TEST	A000065	08/01/1980	3	$61.50	Edit ✔

↻ Clear ↻ Toggle Search |◄ ◄◄ Page 1 | of 1 ►► ►| 50 ⌄ | View 1 - 1 of 1

Click on the **Edit** button to review the prior Comments or to enter a new Comment. Prior Comments are indicated by a green check ✔ beside the Edit button.

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Enter a new Comment in the **Comment to Submit:** box and click the [Save Comment] button. Previously entered comments are shown in the **Comment History** box.

This Comment is then available in SurroundLab AR in the Invoice Notes for this Client Invoice. This Comment will also be displayed in the Client Web AP Detail Report which can be pulled using SurroundLab AR.

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Payments Page

The Client Portal provides a quick, efficient method for reviewing and paying outstanding balances online. The **Payments** page displays Invoices due for payment, Payment Method, and Payment Information.

Making a payment is simple!

- ✓ *Select the invoices you wish to pay*
- ✓ *Select a Payment Method*
- ✓ *Enter the Billing Address and Payment Information*
- ✓ *Click the* Submit *button to process your Payment and receive your Confirmation*

Select the invoices you wish to pay

Find the **Amount to pay column** on the right side of the Invoices due for payment grid. You may select one or more invoices to pay at once. Clicking the ☐ in this column puts a check mark inside the box and defaults the Amount Due as the Amount to pay (example in **red** below).

Invoices due for payment:

Please make payment on your outstanding balances listed below:

Closed Invoices for 100;120;200;225

Client	Invoice	Opened Date	Closed Date	Total Charges	Amount Due	Pending Payments	Amount to pay:
100	472719	05/05/2016	06/01/2016	$61.50	$61.50	none	☑ 51.50
100	472718	04/26/2016	05/02/2016	$7.50	$3.50	none	☑ $3.50
100	472678	09/13/2012	09/14/2012	$58.50	$28.50	pending	⟳

| | Page 1 | | of 1 | 10 ⌄ | View 1 - 3 of 3 |

Total Amount Due: $93.50
Total Amount being Paid: $65.00

In the table above, please select the invoice(s) that you are paying and the amount to be paid. If there is a reason you will not be paying the total amount due, then you will be required to enter comments indicating the patients/tests that do not belong on bill and how they should be processed.

You may change the Amount to pay manually by placing your cursor in this field and entering a new dollar amount. **A partial payment may be entered and will be accepted by the Client Portal.** When the dollar amount entered is less than the Amount Due for an invoice, an action box is presented to you. If you choose, enter a short comment regarding why a partial payment amount was entered and select
Save Comment .

Additional Action Requested ✖

You entered a partial payment amount for Invoice 472719.

The comment box below may be used to help us understand why the balance is not being paid in full.

Thank you for your payment.

Accession 20160610LA is billable under Part B

Save Comment | Cancel

Select Cancel to close the box without entering a comment.

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Select a Payment Method, Enter the Billing Address, and Payment Information

Choose either **Check** (if available) or **Debit/Credit Card** as your Payment Method. Enter the **Payment Information** by completing the full set of fields for the appropriate payment type.

Check

Debit/Credit Card

After entering and reviewing your Payment Information for accuracy, click ⬚Submit⬚ to process the payment.

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Most payment transactions are processed immediately. However, certain factors (connectivity and merchant service delays) could require a few extra seconds to process a payment transaction. In this case, you will receive the message below.

A Payment Accepted message provides you with confirmation that the payment was successfully processed. An email confirmation will be sent to the email address defined for your User ID.

Sample Payment Accepted! Message

Sample Email Confirmation

From:	sysadmin@sldsi.com		Sent: Wed 8/29/2018 1:52 PM
To:			
Cc:			
Subject:	SLDSI Demo Client Services - Invoice Payment Confirmation		

Dear LRTestSuperUser1

Thank you for making a payment with the Seacoast Revenue Mgmt Client Portal.

Please allow up to 10 Business Days for your payment to be reflected on your account. You will receive a payment confirmation E-mail when your payment has been processed. A confirmation number is listed below for your records.

Please contact us at 603-431-4114 if you have any question, comments, or concerns.

Confirmation Number: 000011115555

Payment Date: 2018-08-29 13:51

Payment Details: (ClientId, Invoice #, amount paid)
100	1909	$96.00
100	1888	$15.00
100	1890	$15.00
100	1889	$15.00

	Total:	$141.00

Sincerely,
The Billing Department

Please do not reply to this email, as this is an automated mailbox that does not accept incoming mail.
CONFIDENTIALITY NOTICE: This document, including any attachments, is for the sole use of the intended recipient(s) and may contain confidential and privileged information or otherwise be protected by law. Any unauthorized review, use, disclosure or distribution is prohibited.

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Pending Payments

Payments posted using the Client Portal create a batch automatically. Until the batch is posted, a message will appear on both the Client Portal and in SurroundLab AR's Client Invoice Manager. In the **Pending Payments** column, the word **pending** will appear when a batch has been created for the payment in SurroundLab AR but a user has not yet confirmed the payment by posting, or closing, the batch.

When an invoice has a pending payment, you will not be able to make a payment on the same invoice until the SurroundLab AR Batch is closed. The check box in the Amount to pay: field will be replaced with a [icon] symbol indicating a payment is pending and preventing an amount from being entered.

Invoices due for payment:

Please make payment on your outstanding balances listed below:

Closed Invoices for 100;120;200;225

Client	Invoice	Opened Date	Closed Date	Total Charges	Amount Due	Pending Payments	Amount to pay:
100	472719	05/05/2016	06/01/2016	$61.50	$61.50	none	☐
100	472718	04/26/2016	05/02/2016	$7.50	$3.50	none	☐
100	472678	09/13/2012	09/14/2012	$58.50	$28.50	pending	[icon]

|◄ ◄◄ Page 1   of 1 ►► ►| 10 ▼   View 1 - 3 of 3

The Batch Number and Date is displayed in a message on the invoice in Client Invoice Manager.

Sample Client Invoice Manager Message with Batch Number and Date
Billing System→ Invoice Manager→ Client Invoices (1,4,2)

```
ACSC1-Co.1                      Invoice Manager
───────────────────────────────────────────────────────────────────────
        Client: 100        SURGICAL SERVICES        Curr Bal:      28.50
       Invoice: 472678                               Tot Chgs:      58.50
  Invoice Date: 09/13/2012   Orig Invoice Bal: 58.50  Debit Adjs:     0.00
  Billing Info: Billed on 08/28/2013                 Credit Adjs:     0.00
         Payer: C           Unapplied Cash: 100.00    Tot Paid:     -30.00

   ACCESSION#        DOS          PATIENT NAME                    AMOUNT
   A0000018          09/13/2012   SAMMY TEST                        8.00
   31102195          09/13/2012   PATTY W TEST                      4.00
   31102190          09/13/2012   AMERICA E CAPTTAIN               46.50
   OTHER             12/18/2013   PAYMENT                          -5.00
   OTHER             05/17/2016   Client Payment                  -25.00




              Highlight accession and press Control-Z for detail
   Transaction pending in batch WBC0620161 06/20/16 Administrator, Sys
```

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Edits

When you select the Edits page, you are presented with a grid. Each line in the grid represents an accession edit in SurroundLab AR.

The grid is arranged by DOS Oldest to Newest. You can resort the grid by clicking on the **DOS** Header. Other columns with the sort feature enabled are: **Patient Name, Accession, Edit** and **Age.**
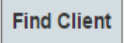
Hovering

The grid may not display all of the details for some edits due to space. If you place your cursor over an edit, such as medical necessity, additional information can be viewed without clicking on the edit.

Choosing Clients to View

If your User ID allows you to access more than one Client ID, use the drop down box to select a specific Client ID or multiple Client IDs. Data for the selected Client ID(s) will be displayed in the **grid.** You may select Check all, Uncheck all, or manually click on the box to the right of the Client ID to check/uncheck to customize your selection(s).

Select one Client ID quickly by entering the Client ID in the selection field to the left of the ![Find Client] button. Then, click Find Client.

Narrowing your grid for one specific Edit

All edits are initially displayed. However, you may limit the data in the grid for a specific edit. This can be helpful when you might only be able to work a certain type of edits (like demographics and insurance) but other edits which require a diagnosis review are completed by a provider of care.

Find the drop down box beside Edits on the right side of your screen above the grid. Click on the ![icon] icon to view a list of edits.

Click on the desired edit name from the drop down box to make your selection. Data for the selected edit will be displayed in the grid.

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Working Demographic Edits

Click on the line in the grid with the edit you wish to work. The selected line item will be highlighted with a red box for improved visibility. Green highlighting on the line indicates that information to satisfy the edit has been entered.

Please Note: Depending on how the edit is configured on the SurroundLab AR side, the incoming information may require review in SurroundLab AR to confirm the data prior to the edit being released. When the edit is released on the accession in SurroundLab AR, the edit line item will no longer be displayed in the online edits grid. In other words, it will be removed.

A new box will appear below the edit grid. This box has multiple tabs: Demographics, Diagnosis, Address, and Insurance.

A red x ❌ appears on any tab where information is missing and beside each field where the data should be entered to clear the edit. The background of fields requiring attention is white, not shaded.

When you click in the box to enter the data, the field will be highlighted in blue so you know which field you have selected since some tabs could be missing data from multiple fields.

Enter Missing Information for Patient: SAMPLE, SUSAN - DOB - Service Date 02/04/2017
A red ⊗ indicates attention is needed. A green ⊘ means no changes are necessary.

⊗ Demographics   ⊗ Diagnosis   Addresses   ⊗ Insurance

Accession Info

Accession	A003001	Client	120	DOS	02/04/2017		
Patient Last Name	SAMPLE	First Name	SUSAN	PID	SUSAN123		

Patient Demographics

Physician Name	ITSA PAIN	NPI	1234567890	Sex	F - Female ▾	DOB	08/30/1972 ⊗

Submit Missing Info Responses

Once you have entered the data, select the **Submit Missing Info Responses** button to send this information to SurroundLab AR.

When the information has been sent to SurroundLab AR, the screen will reset. The highlighted line item will have a green background indicating that this edit has been satisfied. Notice the green check on the corresponding tab which indicates all fields in this table are now satisfied.

Missing Info Requests awaiting your response:

DOS ⬍	Patient Name	PID	Accession	DOB	Order Codes		Edit	Age
02/01/2017	DOE, JOHN	DOEJOHN	A003010	08/08/1945	2004;7028	⊗	Missing Resp Party City	34
02/04/2017	PATIENT, DAN G	G	31102196	01/01/1956	2004	⊗	Medicare Part B or A Eligible	31
02/04/2017	SAMPLE, SUSAN D	SUSAN123	A003001		7028	⊗	Missing DX (1)	31
02/04/2017	SAMPLE, SUSAN D	SUSAN123	A003001		7028	⊗	Missing Patient Birth Date	31
02/04/2017	SAMPLE, SUSAN D	SUSAN123	A003001		7028	⊗	Missing Insured Policy Contract# for p:	31
02/16/2017	TEST, PATIENT	JESSTEST	A000098	08/01/1975	2521	⊗	Missing Medicare Number for payer MEDIC	19
02/18/2017	CLIENT, WEBPORTAL G	098765	31102216	03/10/1956	24;32;841;2201	⊗	Missing Insured Policy Contract# for payer	17
02/18/2017	CLIENT, WEBPORTAL G	098765	31102216	03/10/1956	24;32;841;2201	⊗	Missing Insured Policy Contract# for payer	17
02/18/2017	CLIENT, WEBPORTAL G	098765	31102216	03/10/1956	24;32;841;2201	⊗	Missing Medicare Number for payer WPS M	17
02/21/2017	TEST, APAT	1	A000055	12/03/1961	1517;2004	⊗	Med Nec Failure: Medical Necessity, Policy:	14

|◀ ◀◀ Page 2   of 2 ▶▶ ▶| 10 ▾   View 11 - 20 of 20

*

Enter Missing Information for Patient: SAMPLE, SUSAN - DOB 08/30/1972 - Service Date 02/04/2017
A red ⊗ indicates attention is needed. A green ⊘ means no changes are necessary.

⊘ Demographics   ⊗ Diagnosis   Addresses   ⊗ Insurance

Accession Info

Accession	A003001	Client	120	DOS	02/04/2017		
Patient Last Name	SAMPLE	First Name	SUSAN	PID	SUSAN123		

Patient Demographics

Physician Name	ITSA PAIN	NPI	1234567890	Sex	F - Female ▾	DOB	08/30/1972 ⊘

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Working Address Edits

Review the missing information and enter the needed data in the field.

Once you have entered the data, select the **Submit Missing Info Responses** button to send this information to SurroundLab AR.

When the information has been sent to SurroundLab AR, the screen will reset. The highlighted line item will have a green background indicating that this edit has been satisfied. Notice the green check on the corresponding tab which indicates all fields in this table are now satisfied.

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Working Insurance Edits

Review the missing information and enter the requested information in the empty field.

If an edit filter applies to a particular payer's policy number format, you must satisfy the field by entering a policy number with the correct format for that payer. The help text for this field in SurroundLab AR is displayed to the right of the data field.

Once you have entered the data, select the Submit Missing Info Responses button to send this information to SurroundLab AR.

If you fail to enter data in an acceptable format, the Invalid Information message is displayed.

Re-enter the correct information and select Submit Missing Info Responses again to clear the edit.

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Working Diagnosis Edits

One example of a diagnosis edit is Missing Diagnosis. You will need to review and enter the diagnosis in the highlighted field.

The second type of diagnosis edit occurs when a diagnosis is provided but does not support medical necessity for a particular test. These are displayed as Med Nec Failure on the grid lines.

In this case, the diagnosis 2 field expects the additional diagnosis.

This is a searchable box. You may enter the first portion of the code or a portion of the description. All diagnosis codes are searched; these are not limited to covered codes for a test. It is important that you know the diagnosis.

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Once you have entered any additional diagnosis codes, you need to point to the diagnosis to be used for the test in the medical necessity edit by selecting the drop down box.

Order Code Descriptions + associated primary DX pointers, when needed:

2004 - GLUCOSE

R50.81 ▼ ⊗

2004 - GLUCOSE

R50.81 ▼ ⊗

* a | FEVER P

H93.239
R50.81

The additional diagnosis code is checked to see if it clears the medical necessity edit. If not, this message is displayed.

** Additional Diagnosis did not meet Medical Necessity requirements, if no other diagnosis is available mark box above.

If you referred a patient for a test without a diagnosis that supports medical necessity for this test, you will mark the ☐ No Other Diagnosis Codes Available option.

Diagnosis Information

1	H93.239	2	R50.81	3	
4		5		6	
7		8		9	
10		11		12	

☐ No Other Diagnosis Codes Available

Once you have entered the data, select the **Submit Missing Info Responses** button to send this information to SurroundLab AR. The screen will reset once the response has been submitted to SurroundLab AR and the line item will be green to indicate the edit has been satisfied.

02/21/2017	TEST, APAT	1	A000055	12/03/1961	1517;2004	⊗	Med Nec Failure: Medical Necessity, Poli	14

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Multiple Edits on a Single Accession

An accession can have multiple edits displayed in the grid. In this case, all corresponding tabs which need to be reviewed will have a red x ⊗ .

Collapsing and Expanding the Grid

Once you begin working the edits for a particular patient's accession, you may collapse the grid by using the ⬆ icon. This icon is located in the upper right-hand corner of the grid. Restore the grid to full size by clicking on the ⬇ icon.


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Contact Page and Company Information

The Contact Information includes the billing address, phone number, fax number, general email address and hours of operation. If a field is left blank, no reference label will display on the web portal.

Admin Page

A user with access to the Site Administration, or **Admin,** Page can set Notifications and make changes to the Billing Address which displays in multiple pages of the Client Portal. This information can be set/changed by SurroundLab AR Company to accommodate the use of multiple companies.

Notification Settings

The Admin user can set a notification for one or more Client IDs to receive an email when the Client is notified that a new invoice is available or when an online payment is made. The Notification Settings provide you with an opportunity to reduce time spent managing client accounts and behavior for those referring providers with a history of not paying timely and/or justifying late or non-payment by denying receipt of an invoice.

Click the [Add Notification] button to create an entry. Enter the Invoice Notification Email Address and the Payment Notification Email Address. Multiple email addresses may be added in either box by separating them with a comma.

Once you have entered the email addresses, select the Clients for the notifications by clicking the box next to each applicable Client ID. Click on the [Save Notification Setting] button to save your changes. A new line item will appear in the grid. You may Edit or Delete the notification setting at any time.

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Billing Address

Under the Billing address section, the Company Name, Address, Billing Email Address, Phone, Fax, and Business Hours which are displayed in multiple areas of the Client Portal can be updated.

Note: the Company to Edit displays the name of the SurroundLab AR Company which has been defined in Company Definition. However, updating the Company Name and subsequent information via the portal does NOT alter the SurroundLab AR Company Definition. It does, however, permit a variance from the information entered in SurroundLab AR.

Billing Address

Company Name	Seacoast
Street1	195 New Hampshire Ave
Street2	Suite 100
City	Portsmouth
State	NH - New Hampshire ▾
Zip	03801
Billing Email	billing@sldsi.com
Billing Question Phone #	603-431-4114
Billing Fax #	
Hours of Operation Text	9am-5pm EST

Submit Billing Address Info

A message is displayed when the information has been saved.

Saved Company Info to SLAR.

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Posting Online Payments in SurroundLab AR

A new batch will be automatically opened each day in SurroundLab AR when the first online payment is made, regardless of whether the previous day's batch has been posted. All payments made on the same day will be in the same batch, regardless of Payer ID, unless the first batch opened for that day is posted. In this case, a second batch will be created when the next online payment is processed that day. If no additional payments are made then additional batches will not be opened. Payments are applied to the oldest invoice open date, then by invoice number.

Review the Online Payment Batch (aka Web Batch)

Web batches are not automatically posted in SurroundLab AR. Use the Batch Detail Report to balance the online payments recorded in SurroundLab AR to the payment data from your Merchant Service Vendor. Then, use the Batch Edit menu option to post the validated batch.

Batch Detail Report
Billing System→ Post Payments→ Batch Detail Report (1,6,6)

Complete the following fields to run the Batch Detail Report and review online payment details.

Output Device: Enter a valid Device ID, or enter "/L" (List command) to generate a list of all Output Devices. You can also generate a list of matching devices by entering the first few characters of the description or alias. This field is required.

Batch Date: Enter the Batch Date or /L for a list of all open batches.

Batch #: Enter the Batch number you would like to see on this report or /L for a list of Batch numbers.

Invoice(s): Enter an Invoice number, /L for a list of Invoice numbers, or * for ALL.

```
ARBD-Co.1                    Batch Detail Report

          Output Device: SCREEN

             Batch Date: 10/03/2018
               Batch #: WEB1003181

             Invoice(s): *












                    [Print]   [Edit]   [Exit]
```

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Sample Batch Detail Report Output

```
User: JLH                    Batch Detail Report                08/14/2018
Page: 1  Company: 1  Batch Date: 08/14/2018  Batch Number: WBC0814181  10:03 AM


Batch Date   Batch #     Status  UID  Tape Tot $  Debit $  Payment $  Credit $
----------   -------     ------  ---  ----------  -------  ---------  --------
08/14/2018  WBC0814181  Open   ADMIN    92.71      0.00     92.71      0.00

          Posted Date:                 P/C/TP: C         Open Date:
            Comments: Web Ap Client Payments
            ** This batch is open **
==============================================================================
Batch Transactions ... for : C (Client)

     CLIENT #          Check #              Check Date  Check Amt
     -----------       --------------------  ----------  ---------

     100               100157                08/14/2018    5.00




User: JLH                    Batch Detail Report                08/14/2018
Page: 2  Company: 1  Batch Date: 08/14/2018  Batch Number: WBC0814181  10:03 AM

Batch Transactions ... for : C (Client)

     CLIENT #          Check #              Check Date  Check Amt
     -----------       --------------------  ----------  ---------

                       Invoice     Item  CPT    TX Type  TX Code   TX Amt
                       ----------- ----  ------ -------  --------- --------
TEST,CLIENT            1494          0           P        CINDY       5.00

     100               100158                08/14/2018   87.71

                       Invoice     Item  CPT    TX Type  TX Code   TX Amt
                       ----------- ----  ------ -------  --------- --------
TEST,CLIENT            1495          0           P        CINDY      87.71
Batch integrity OK

Total accounts:     2
Total items:        2
<CR> to continue:
```

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Batch Edit
Billing System → Post Payments→ Batch Edit (1,6,5)

After reviewing the batch using the Batch Detail Report and the WEB AP Batch Report, the batch should be manually closed. While batches are opened automatically in SurroundLab AR, manual posting is required to provide the opportunity to review prior to posting.

```
ACBE-Co.1                          Edit Batch

 Batch Date: 08/14/2018

    Batch #: WBC0814181     Client batch: Web Ap Client Payments












   [Batch Header]  [Edit a Check]  [Delete Payment]  [Post Batch]      [Edit]
   [Delete Batch]  [Cancel]        [Split Batch]     [Reclaim UnapCash] [Exit]
```

The Deposit Date for the web batch is defaulted to the open date for the batch. You can change the Deposit Date using the Batch Edit screen to select **[Batch Header]** to access and change the Deposit Date field.

When you are ready to post a web batch, use SurroundLab AR's Batch Edit menu. Select the Batch you wish to post by entering the Batch Date and Batch #. You may use the /L in both fields to select from a list of dates and batch numbers. Then, select **[Post Batch]**.

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Web AP Client Batch Report
Billing System→ Post Payments→ Web AP Client Batch Report (1,8,20)

Run the Web AP Client Batch Report to review the transactions sent from the client portal to SurroundLab AR.

Enter the Output Device, Batch Date, and Batch Number and select **[Print]** to run the report.

```
ARWEBLC-Co.1              Web Ap Client Batch Entry Report

           Output Device:  SCREEN

             Batch Date:  07/22/2018

           Batch Number:  WBC0722181












               [Print]   [Edit]   [Exit]
```

Sample Web AP Client Batch Report Output

```
User: JLH                        Web AP Client Batch Report                  08/14/2018
Page: 1                            Batch Date: 07/22/2018                     9:33 AM
                                   Batch Number: WBC0722181


Client                    Paid Amt  Message
------                    --------  ----------------------------------------
100-Lisa's Test Client       15.00  Payment posted to invoice 1888

100-Lisa's Test Client       87.71  Payment posted to invoice 1495

100-Lisa's Test Client      118.99  Payment posted to invoice 1521

100-Lisa's Test Client       40.99  Payment posted to invoice 1547
<CR> to continue: █
```

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Auditing the Client Portal Responses

Accession Audit History Report

Utilities→ Audit Reporting→ Accession Audit History Report (2,4,1)

The Accession Audit History Report has been enhanced to include the following audit information relating to the Client Portal:

- The Web AP User ID and name who viewed and/or edited an accession
- SurroundLab AR user who released the edits to the Client Portal
- SurroundLab AR user who accepted the data into SurroundLab AR from the Client Portal.
  Note: *If the edit is set up for auto file the audit will display the "Sys Administrator" as the user who filed the data into order entry.*

```
ARAAU-Co.1                    Accession Audit History Report

    Output Device: SCREEN

        Accession: 31102216

      Report Type: D Detail of all transactions












                        [Print]   [Edit]   [Exit]
```

Sample of Web AP User ID tracked in the Accession Audit History

```
-----------------------------------------------------------------------
Audit : Wednesday 08/29/2018 at 9:26:25 AM
User  : Sys S Administrator, on Screen AXAPICLE, from Device 0
Action: NOTES

      [NOTES]
      Web Ap User: JLHmaster Jess Hodges *--*
      Viewed Accession on Client Services Portal
-----------------------------------------------------------------------
```

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Sample Accession Audit History Report Output

```
User: JLH      Company 1 - Seacoast Laboratory Data Systems, Inc.   06/20/2016
Page: 1                     Accession Audit History Report            10:45 AM
                            Detail for Accession: 31102216

Audit : Thursday 03/24/2016 at 11:52:25 AM
User  : Seacoast Demo User, on Screen C68AOE, from Device |TNT|10.100.11.22:5002
Action: OE UPDATE

      [OE UPDATE]
      Field information changed:
          Field: 2nd Payer
                  OLD=AETGRE
                  NEW=AETNA
-------------------------------------------------------------------------------
Audit : Thursday 03/24/2016 at 11:52:31 AM
User  : Sys Administrator, on Screen AXAPICLE, from Device 0
Action: NOTES

      [NOTES]
      Web Ap User: admin System Administrator
      Viewed Accession on Client Services Portal
-------------------------------------------------------------------------------

<CR> to continue: █
```

```
User: JLH      Company 1 - Seacoast Laboratory Data Systems, Inc.   10/03/2018
Page: 16                    Accession Audit History Report             1:15 PM
                            Detail for Accession: A001818

Audit : Wednesday 10/03/2018 at 1:15:00 PM
User  : Seacoast Test User, on Screen ANPELE, from Device |TNT|10.100.10.200:490
Action: NOTES

      [NOTES]
      Pre-Filed Portal Edits:
      Medical Necessity, OC: 4413
-------------------------------------------------------------------------------
Audit : Wednesday 10/03/2018 at 1:15:01 PM
User  : Seacoast Test User, on Screen AOE, from Device |TNT|10.100.10.200:494840
Web User: Jessica Parkins
Action: OE UPDATE

      [OE UPDATE]
      Field information changed:
          Field: DX (2)
                  OLD=
                  NEW=R50.81
<CR> to continue:
```

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Client Portal Security

Create a New User ID

To view the User List, log into the Client Portal and Select the Client Admin page. If any users have previously been created, the User List is displayed in a grid format to provide a summary overview of the users, including their assigned Clients, Roles, Edits, and Status.

User ID ⬧	User Name	Company	Clients	Super User	Master User	Activity	Invoices	Payments	Edits	Profile	Status	Password	Delete
UserID Search	UserName Search												
bhuddleston@sldsi.cc	Test, Beth			✔	☐	✔	✔	✔	✔	Edit	Active	Reset	Delete
bhuddlestonm	Test, Beth	Seacoast Laboratory Data Systems	0001	☐	✔	✔	✔	✔	✔	Edit	Active	Reset	Delete
bhuddlestonm2	beth, Master2	Seacoast Laboratory Data Systems	0001;100300;2004;2	☐	✔	✔	✔	✔	✔	Edit	Active	Reset	Delete
bhuddlestons	beth, super			✔	☐	✔	✔	✔	✔	Edit	Active	Reset	Delete
DemoMasterCo1	DemoMasterCo1	Seacoast Laboratory Data Systems	0001;100	☐	✔	✔	✔	✔	✔	Edit	Active	Reset	Delete
DemoMasterCo2	DemoMasterCo2	Seacoast Company 2	9001;TEST;TPA	☐	✔	✔	✔	✔	✔	Edit	Active	Reset	Delete
DemoSuperUser	DemoSuperUser			✔	☐	✔	✔	✔	✔	Edit	Active	Reset	Delete
jcmaster	JCMASTER	Seacoast Company 2	TEST	☐	✔	✔	✔	✔	✔	Edit	Active	Reset	Delete
jcmaster2	JCMASTER2	Seacoast Laboratory Data Systems	2000;2004	☐	✔	✔	✔	✔	✔	Edit	Active	Reset	Delete
jcmaster4	JCMASTER4	Seacoast Laboratory Data Systems	0002;0001;1008;100	☐	✔	✔	✔	✔	✔	Edit	Active	Reset	Delete
jcsuper	JCSUPER			✔	☐	✔	✔	✔	✔	Edit	Active	Reset	Delete
JLHmaster	Jess Hodges *--*	Seacoast Company 2	9001;TEST;TPA	☐	✔	✔	✔	✔	✔	Edit	Active	Reset	Delete
JLPsuper	Jessica Parkins			✔	☐	☐	☐	☐	✔	Edit	Active	Reset	Delete
lisat	Lisa Turgeon			✔	☐	✔	✔	✔	✔	Edit	Active	Reset	Delete
lmlco2m	Turgeon,Lisa	Seacoast Company 2	9001	☐	✔	✔	✔	✔	✔	Edit	Active	Reset	Delete
lrtestmaster1	LRTestMaster1	Seacoast Laboratory Data Systems	100300;2142	☐	✔	✔	✔	✔	✔	Edit	Inactive	Reset	Delete
lrtestmaster1co2	LRTestMaster1Co2	Seacoast Company 2	TEST;9001	☐	✔	✔	✔	✔	✔	Edit	Active	Reset	Delete
lrtestmaster2	LRTestMaster2	Seacoast Laboratory Data Systems	0001;2004	☐	✔	✔	✔	✔	✔	Edit	Active	Reset	Delete
lrtestmaster3	LRTestMaster3	Seacoast Laboratory Data Systems	0001;100;10972	☐	✔	✔	✔	☐	☐	Edit	Active	Reset	Delete
lrtestmaster4	LRTestMaster4	Seacoast Laboratory Data Systems	0001;0001A;0002;10	☐	✔	☐	✔	✔	☐	Edit	Active	Reset	Delete

Clear ... Page 1 of 2 ... 20 ... View 1 - 20 of 29

Add New User

This grid may be sorted to show only Master Users, Super Users, or Users by SurroundLab AR Company. You may also quickly find a User ID in the grid by using the User ID or User Name search boxes.

User ID ⬧	User Name
UserID Search	UserName Search

To create a new User ID, click on the **Add New User** button below the grid.

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Complete the following sections of necessary information to create the New User:

   ✓   Select the Role for the New User ID

   ✓   Basic Information

   ✓   Assign the Pages accessible to the User

   ✓   Assign the Missing Info Edits visible to the User

Create New User

Enter the new user information and click the Submit User Information button when done.

Role for New User:

- ⦿ Master User - Can view and create Sub Users in existing client set.
- ◯ Super User - Can view and create Sub Users for any client.

Basic Information:

User ID	e.g. UserID123
User Name	e.g. last name, first name
Email	e.g. example@abc.com

Click to set Company and Clients

Company	
Clients Viewable	

Pages accessible to the User:

☐ Activity   ☐ Invoices   ☐ Payments   ☐ Edits

Missing Info Edits visible to User:

☐ Patient Demographics
☐ Diagnosis Related Edits
☐ Insurance Information
☐ Medicare A or B Eligibility
☐ Nursing Home
☐ Physician Information NPI
☐ Responsible Party Information

[Submit User Info]   [Cancel]

Once you have completed the fields and made the necessary assignments, select the [Submit User Info] button to save the changes and create the User. An email will be sent to the email address you entered.

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Select the Role for the New User ID

Both Master and Super Users can create Sub Users. However, a Master User can only create Sub Users for their assigned Clients. Super Users can create Sub Users in any existing client set. **The Super User Role should be assigned ONLY to laboratory employees to avoid providing access to Protected Health Information (PHI) between your Referring Providers.**

Role for New User:
- ● Master User - Can view and create Sub Users in existing client set.
- ○ Super User - Can view and create Sub Users for any client.

If you are providing external access to the Client offices you serve, you should provide the Master User Role and select one or more Client IDs associated with that Client group. The Master User can then provide Sub User IDs to representatives inside the provider's office or offices to access the portal.

Practical Example of Master User and Sub Users:

Physician Associates is a group of providers who refer to your laboratory. Their Office Manager's name is Lauryn Ocasio. Lauryn has three office personnel who will need access to the Client Portal. Ms. Ocasio will be the Master User for this provider's office and she will create a Sub User for each of her personnel.

Consider that Physician Associates has three locations and each location manages staff separately. You could provide a Master User to each Office Manager who will create and manage his/her own staff logins as Sub Users for convenience.

If each location has a separate Client ID in your SurroundLab AR billing system, you can go one step further and assign only the Client ID associated with each location to the Master User. Then, the Master User will only be able to create Sub Users with access to the same Client ID.

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Creating a Sub User

When a Master User selects the Create New User button, the Role for New User is limited to Sub User. The Client ID list is limited to the Clients for which the Master User has been provided access. The Pages and Missing Info Edits options are offered.

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Enter the Basic Information

Enter the desired User ID, the User Name, and Email Address in this section.

Basic Information:

User ID	Newuserid
User Name	New User Name Here
Email	sample@newuser.com

Continue entering the Basic Information for this User ID by selecting the SurroundLab AR Company and Client assignment. Note: you may only have one company in SurroundLab AR. If you have logged in as a Master User with access to only one SurroundLab AR Company, you will see only the assigned company.

Select Company and Clients ✖

Select the Company

Seacoast Laboratory Data Sys ▼

Seacoast Laboratory Data Systems, Inc.
Seacoast Company 2
SLDSI COMPANY 3

clients or *string or *string* to search for a string of characters within the Client Name.

Click on the Client IDs you wish to assign. You may also search for a specific Client ID using the search feature. You may also paste a list from a file in the format "ClientID^ClientID^ClientID…".
Example: 100^200^2109^3498. Paste the text string in the Search field to add the list of Clients at once.

Select Company and Clients ✖

Select the Company

Seacoast Laboratory Data Sys ▼

Search Clients - Leave blank to obtain all clients or *string or *string* to search for a string of characters within the Client Name.

[Find Clients]

Clients to Select

☐ 0001 - CENTRAL CLINIC	☐ 0001A - KANDI BARR	☐ 0002 - BEST TEST CLIENT	☑ 100 - Lisa's Test Client
☐ 100300 - PAIN MASTER	☐ 1008 - A HEALTHY PLACE 2B	☐ 1021 - THE TESTING CLINIC	☐ 10972 - AIT TEST FILE
☐ 1200 - SUNNY SIDE AGING HOM	☐ 2000 - CINDY'S HOLISTIC CLI	☐ 20000 - New Age Physician He	☐ 2001 - THE DOCTOR'S PLACE
☐ 2002 - DOCTOR OFFICE	☐ 2004 - COMMUNITY CLINIC	☐ 2005 - SENIOR GOOFY M.D.	☐ 2007 - IMAGINATION CENTER
☐ 2008 - FEEL GOOD CLINIC	☐ 2009 - DHAR,HALPERN & GUPTA	☐ 2011 - ENG H. HUAN, M.D.	☐ 2012 - PEDI & ADOL MEDICAL
☐ 2013 - WOMEN'S CARE MEDICAL	☐ 2014 - LEON LUBIANKER, M.D.	☐ 2015 - JOSEPH C. AVAKOFF, M	☐ 2016 - JONATHAN E. RODNICK,

[OK] [Cancel]

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Sample of Search Client Function

Once you have made your selections, the Company and Clients Viewable are displayed.

Now, you can complete the next sections to provide access to specific Client Portal Pages and Missing Info Edits.

Assign the Pages accessible to the User

The Client Portal for SurroundLab AR offers multiple pages of functionality.

Activity   Invoices   Payments   Edits   Contact   Client Admin   Admin

- ❖ *Activity: View and/or export a list of accessions on the current monthly invoice prior to billing*
- ❖ *Invoices: View and/or export a prior billing invoice*
- ❖ *Payments: Pay a closed statement balance online*
- ❖ *Edits: Work Missing Information Edit, such as missing insurance, demographic, or diagnosis, online instead of receiving faxes*
- ❖ *Contact: Displays the contact information for your organization*
- ❖ *Client Admin (Client Admin User IDs ONLY)*

Check the box beside each page of the Client Portal which this User ID should be able to see when they log in. If the user should have access to all of the Pages, check all of the boxes. Or, if a user only needs access to review current activity, closed invoices, and make payments then you can elect not to provide access to the Edits Page of the Client Portal.

Pages accessible to the User:
☑ Activity   ☑ Invoices   ☑ Payments   ☐ Edits

Missing Info Edits visible to User:
☐ Patient Demographics
☐ Diagnosis Related Edits
☐ Insurance Information
☐ Medicare A or B Eligibility
☐ Nursing Home
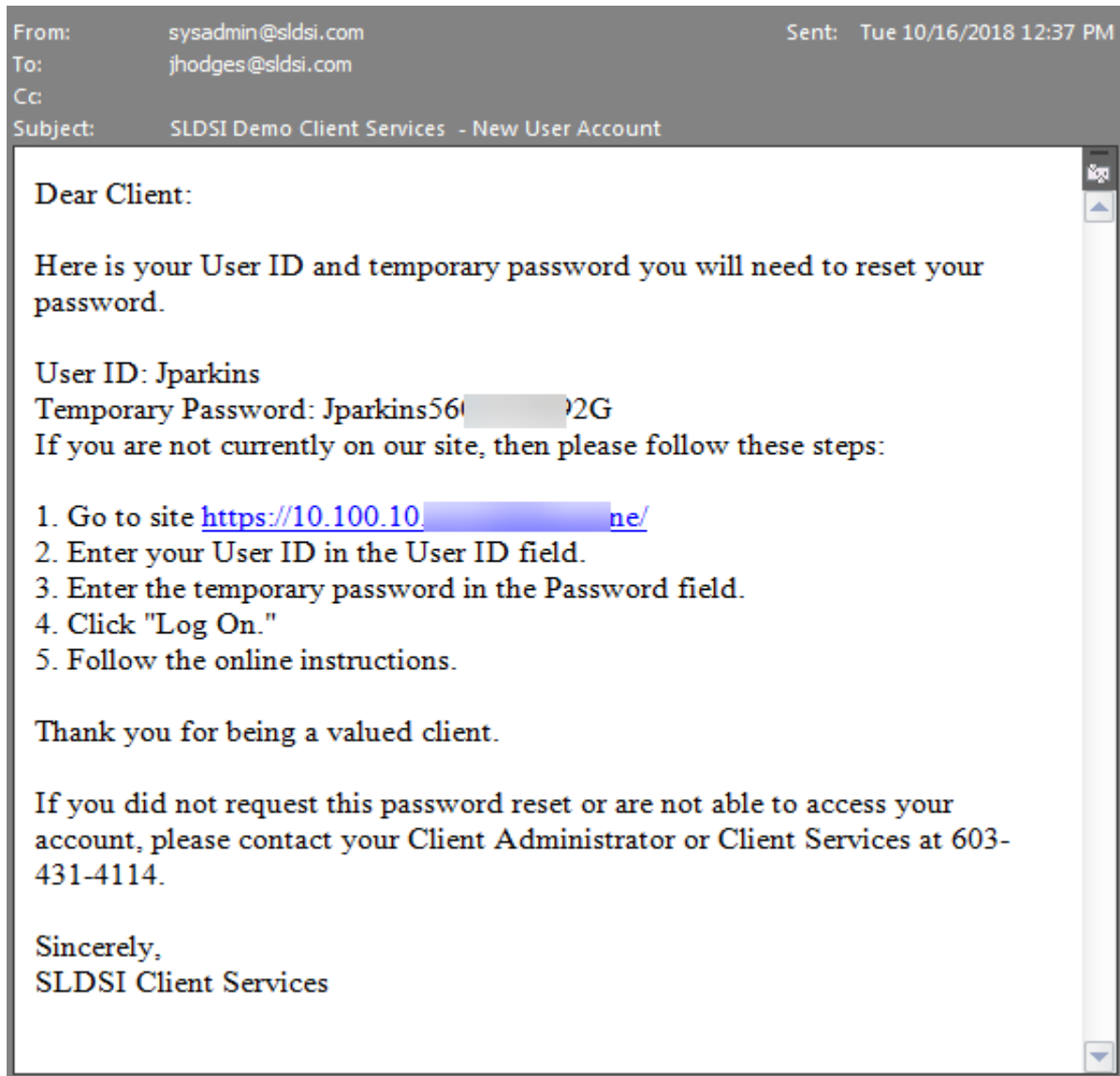☐ Physician Information NPI
☐ Responsible Party Information

If you have a user who does not need access to invoices and payments, you can select only the Edits Page to provide access to Missing Information Edits only.

Pages accessible to the User:
☐ Activity   ☐ Invoices   ☐ Payments   ☑ Edits

Assign the Missing Info Edits visible to the User

The Missing Info Edits can be assigned by the Edit Category in which they are defined in SurroundLab AR. If you select the Edits Page, the Missing Info Edits will be available to specify which Edits the user should see. If you select the Edits Page you **must** assign one or more of the Missing Info Edits. If you click on Submit User Info without assigning edits, you will receive the message below.

Must select at least one Missing Info Edits category for this user.

If you would like a user to have access to all of the Missing Info Edits, check all of the boxes available.

Pages accessible to the User:
☐ Activity   ☐ Invoices   ☐ Payments   ☑ Edits

Missing Info Edits visible to User:
☑ Patient Demographics
☑ Diagnosis Related Edits
☑ Insurance Information
☑ Medicare A or B Eligibility
☑ Nursing Home
☑ Physician Information NPI
☑ Responsible Party Information

However, if different resources will work Demographics and Insurance than Diagnosis Related Edits then you will want to assign only the edits appropriate for each User ID.

Missing Info Edits visible to User:
☑ Patient Demographics
☐ Diagnosis Related Edits
☑ Insurance Information
☑ Medicare A or B Eligibility
☑ Nursing Home
☐ Physician Information NPI
☑ Responsible Party Information

Missing Info Edits visible to User:
☐ Patient Demographics
☑ Diagnosis Related Edits
☐ Insurance Information
☐ Medicare A or B Eligibility
☐ Nursing Home
☐ Physician Information NPI
☐ Responsible Party Information

When the user logs into the portal, the accession(s) containing an edit in the assigned category or categories are displayed to this user.

Once the new User has been successfully created, an email is sent to the email address with his/her temporary password.

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Client Administration:

Successfully created new User. Email was sent to the new user with their temporary password.

Sample Email Notification for a New User Account

From:	sysadmin@sldsi.com	Sent: Tue 10/16/2018 12:37 PM
To:	jhodges@sldsi.com	
Cc:		
Subject:	SLDSI Demo Client Services - New User Account	

Dear Client:

Here is your User ID and temporary password you will need to reset your password.

User ID: Jparkins
Temporary Password: Jparkins56   2G
If you are not currently on our site, then please follow these steps:

1. Go to site https://10.100.10.   ne/
2. Enter your User ID in the User ID field.
3. Enter the temporary password in the Password field.
4. Click "Log On."
5. Follow the online instructions.

Thank you for being a valued client.

If you did not request this password reset or are not able to access your account, please contact your Client Administrator or Client Services at 603-431-4114.

Sincerely,
SLDSI Client Services

When the user logs into the portal for the first time, he/she will be prompted to create a password of their choosing.

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Complete the three fields: **Current Password**, **New Password**, and **Enter new Password again** to set a new password for this User ID.

Successful Attempt

When the user successfully meets the requirements and has set a new password, a message is displayed to confirm the success.

Successfully updated user password.
Successfully saved User Data.

Failed Attempts

A message is displayed if the password typed in the New Password and Enter the New Password again fields are not a match.

Your new password must be entered and match correctly for both fields.

The passwords set for the Client Portal must meet the SurroundLab AR System Settings requirements to be set as the new password. Hovering your cursor over the **Valid Password Format?** text displays the requirements for the password as defined in the System Settings of SurroundLab AR.

Valid Password Format?

New Password

Enter new
Password again

Min 8 Characters
Min 1 Lower Case Letter(s)
Min 1 Number(s)
Min 1 Special Character
Min 1 Upper Case Letter

Update Information
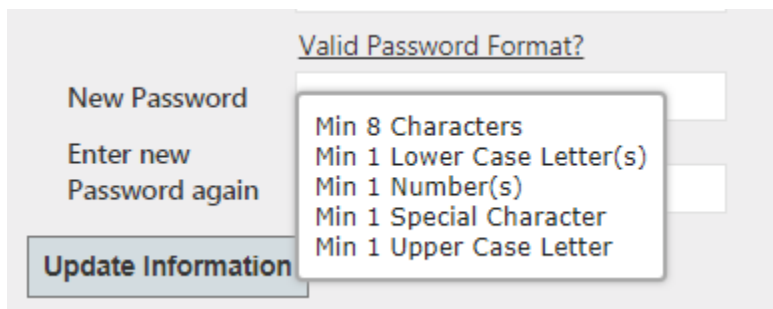
If the new password does not meet the required criteria for a valid password, it will not be updated and a message is displayed to help the user meet the requirement on the next attempt.

You must provide correct valid password.
Min 8 Characters
Min 1 Lower Case Letter(s)
Min 1 Number(s)
Min 1 Special Character
Min 1 Upper Case Letter

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Editing a User ID

To make changes to an existing User ID, click on the Client Admin page. Find the User ID you wish to edit and select the **Edit** button located to the right of the assignment of Pages and under the column header of Profile. You may then make changes to the User ID.

Client Administration:

Show All Users ▼   Show All Companies ▼

You can search and sort by User ID and User Name. To reset the results click the 'Clear' button.

User ID ⬆	User Name	Company	Clients	Super User	Master User	Activity	Invoices	Payments	Edits	Profile	Status	Password	Delete
UserID Search	UserName Search												
lrtestsuperuser1	LRTestSuperUser1			✔	☐	✔	✔	✔	✔	Edit	Active	Reset	Delete
lrtestsuperuser2	LRTestSuperUser2			✔	☐	✔	✔	✔	✔	Edit	Active	Reset	Delete
lrtestsuperuser3	LRTestSuperUser3			✔	☐	☐	☐	✔	☐	Edit	Active	Reset	Delete
LRTestSuperUser7	LRTestSuperUser7			✔	☐	☐	✔	✔	☐	Edit	Active	Reset	Delete
m2018	Master 2018	Seacoast Laboratory Data Systems	2018	☐	✔	✔	✔	✔	✔	Edit	Active	Reset	Delete
m2020	Master 2020	Seacoast Laboratory Data Systems	2020	☐	✔	✔	✔	✔	✔	Edit	Active	Reset	Delete
newuserid	New User	Seacoast Laboratory Data Systems	100	☐	✔	☐	☐	☐	✔	Edit	Active	Reset	Delete

Edit User newuserid

Update user information as needed. Click the Submit User Information button when done.

Role for New User:
- ◉ Master User - Can view and create Sub Users in existing client set.
- ○ Super User - Can view and create Sub Users for any client.

Basic Information:

User ID	newuserid
User Name	New User
Email	sample@sldsi.com

Click to set Company and Clients

Company	Seacoast Laboratory Data Sy
Clients Viewable	100

Pages accessible to the User:
☐ Activity   ☐ Invoices   ☐ Payments   ☑ Edits

Missing Info Edits visible to User:
- ☑ Patient Demographics
- ☑ Diagnosis Related Edits
- ☑ Insurance Information
- ☑ Medicare A or B Eligibility
- ☑ Nursing Home
- ☐ Physician Information NPI
- ☑ Responsible Party Information

Select the **Submit User Info** button when you are ready to save your changes.

Submit User Info   **Cancel**

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To make a User ID Inactive, click the (Active) button on the user line item in the User List. A message will appear. This option should be used to prevent access to the portal for a User who should no longer have access. **When a user leaves the organization, the User ID should be made Inactive immediately.**

Click Yes to confirm your action, making the User Inactive. The user will no longer be able to log in.

You may also use the (Delete) button to delete a User from the User List. The following message will be displayed. If the User ID has been used for activities which were logged in SurroundLab AR audits, the event will no longer show a User ID attached to it.

Tip: Instead of Deleting a User ID which has performed activities, consider making the User Inactive to prevent access to the Client Portal.

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Resetting Your Password

You may change the Password for your own User ID from inside the Client Portal by clicking on **Settings** in the banner to display the **Update** screen. This screen will also allow you to update additional information, such as the User Name and Email address. Move your cursor into the field you wish to update and type the updated information.

To change only your password:

Enter your Current Password. Then, in both the New Password and Enter new Password again fields, enter the new password. Click the [Update Information] button to save the updates for your User ID.

Hover your cursor over the text Valid Password Format? (located under **Current Password)** to display the required format for the new password.

If the new password you entered fails to meet the required format, a message is displayed providing additional details of the required format to assist you with your next attempt.

Update

You must provide correct valid password.
Min 8 Characters
Min 1 Lower Case Letter(s)
Min 1 Number(s)
Min 1 Special Character
Min 1 Upper Case Letter

User ID	Admin	User Name	System Administrator
Email	jhodges@sldsi.com		

If you want to update your password, fill in these three fields below.

Current Password

Valid Password Format?

New Password

Enter new Password again

Update Information

The message **"Your new password must be entered and match correctly for both fields."** is displayed in **red** if the information you entered in the **New Password** field does not match the information you entered in the **Enter new Password again** field.

Update

Your new password must be entered and match correctly for both fields.

User ID	Admin	User Name	System Administrator
Email	jhodges@sldsi.com		

If you want to update your password, fill in these three fields below.

Current Password

Valid Password Format?

New Password

Enter new Password again

Update Information

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Resetting the Password for another User ID

If you are an administrator, you may select (Reset) at the far right of the grid to send a user an email with a temporary password. The user may log in to set a permanent password.

Sample Email with Temporary Password