

Attachment 2: HO Memo 09-11
Instructions for Entering into the Client Database (CDB) Billing Section
April 2009

1. Search the CDB ID for the client you will enter, starting from the CDB Main Menu

CPEST Client Database

Today is: Monday, April 6, 2009 [Help ?](#) [Logoff](#)

Current User: CARMELA GROVES **Jurisdiction:** Statewide

System Messages Message Date: 12/08/2008

New dbm starting 12/08/2008 Jia Soellner is our new dbm and can be reached at 767-0815 or jsoellner@dhmh.state.md.us

Client Tools	Reports	Administration
Search For Client - ID	Reports Menu	Security Role Maintenance
Search For Client - Personal Info		System Configuration Settings
Add New Client		System Messages
		Sponsor Maintenance
		Program User Maintenance

Search for Clients by ID

Select search criteria and click the search button.

[Main Menu](#) [Add Client](#)

Type of ID: CDB ID Local ID BCCP ID

Program:

ID:

[Search By Personal Info](#)

2. Open the 'Billing Info' section from the Client Information

Client Information for 'One, Keith N'

Use the links provided to add or edit information for the selected client.

CDB ID: [Help ?](#)

Search Again By [IDs](#) OR [Personal Information](#) [Main Menu](#)

Client Profile

[Client Summary Report](#) [Edit Core Data](#)

Jurisdiction/Program: Baltimore City-UMMS

Client Name: One, Keith N **CDB ID:** 20002

DOB: 11/09/1945 **Local ID:** 01-02-00021

Gender: Male **BCCP ID:** 05001109457896

4 Digit SSN: 7896 **CPEST Enrollment Date:** 01/01/2003

Race: White/Caucasian **Ethnicity:** Non-Hispanic/Latino

Address Information

Residential Address: 789 W 23rd Avenue 103
Baltimore, MD 21598

Mailing Address: 789 W P.O Box 1123 Avenue 103
Baltimore, MD 21598

Other Information

Primary Health Care Provider: Jane Doe
123 Jame Street
Baltimore, MD 21201

Insurance: No

Primary:

Secondary:

[Recall Info](#) [Billing Info](#)

3. Select Module = 'Colorectal Cancer' from the drop down; Click Add Expense

Client Billing

CDB ID:

Client Name: One, Keith N **CDB ID:** 20002 **Module:** -- Select Module --

Expenses

<u>Expense ID</u>	<u>Procedure Date</u>	<u>Provider</u>	<u>Procedure Name</u>	<u>Estimated Expense</u>	<u>Date Paid</u>	<u>Amount Paid</u>	<u>Actions</u>
3	01/01/2004	Baltimore GI Associates	colonoscopy professional fee	\$1,000.00	02/15/2004	\$100.00	Edit Delete

4. Enter information as reflected in the red highlights and Save entry. Enter every procedure/charge associated with the colonoscopy, including, but not limited to: facility fee, physician fee, prep costs, anesthesia, drugs, laboratory (bloodwork), pathology (biopsy), other testing (e.g., EKG, chest xray).

Client Billing - Add New Expense

Enter the information for the new expense.

Client Name: One, Keith N **CDB ID:** 20002

Expense ID: [System Generated] **Module:** CRC **Jurisdiction:** Baltimore City-UMMS

Estimated Expense Amount: \$0.00 **Estimated Funding Source:** []

Cycle: -- Select Cycle --

Procedure: -- Select Procedure from List --

OR Procedure Name: []

Provider: -- Select Provider -- or Add Provider

Procedure Date [mm/dd/yyyy]: [] **Date Results Received [mm/dd/yyyy]:** []

Procedure Code: [] **Sponsor:** []

CPT Modifiers: [] **Bowel Prep Payment:** --Select --

Ambulatory Payment Classification: []

EOB Date Received [mm/dd/yyyy]: []

Date Bill Received [mm/dd/yyyy]: [] **Invoice Amount:** \$0.00

Date Approved [mm/dd/yyyy]: [] **Date Paid [mm/dd/yyyy]:** [] **Amount Paid:** \$0.00

Paid Funding Source: [] **Person Responsible:** []

Direct Payment Number: []

Purchase Order Number: [] **Purchase Order Amount:** \$0.00

Check Number: [] **Check Date:** []

Text 1: [] **Text 2:** []

Comments:

Procedures can be entered into the billing table by two different methods:

1) If the procedure is a standard procedure that appears in the database (e.g., colonoscopy or pre-screening visit) or a procedure you have already entered in additional procedures as 'other' (e.g., lab work, chest-ray, or EKG), the name of this procedure will appear in the drop-down box ('Select Procedure from List' in field called '**Procedure**'). Much of the information associated with that procedure will auto-fill (except cycle number), if it

has been completed. If a provider name has NOT been included with that procedure, you can select the Provider Name from the Provider drop down box or click the 'Add Provider' button to add the provider.

2) If the charge is not for a standard procedure (e.g.; anesthesia or pathology services or facility charge), enter the name of the charge in the field called '**Procedure Name**'. Once this is done, you can select the 'Provider Name' from the drop down list (if you have already entered the name in the Health Care Provider Page.)

5. Repeat instructions 3 and 4 for each billing record.