How do I add a Claim Rejection message to a Patient Statement?

NDCMedisoft Version 10 introduced the ability to add Claim Rejection messages to Patient Statements. If you are on a version of NDCMedisoft prior to Version 10, you will not have this functionality. Additionally, because you need access to the Deposit List, this functionality is not available in NDCMedisoft Original.

In order to add Claim Rejection messages to your Patient Statements, take the following steps:

1. Click on the Reports menu and Design Custom Reports and Bills.



2. Click on the File menu and Open Report.



3. In the Open Report window, click on the Statement format to which you wish to add the Claim Rejection message, and click on OK. If you send your statements using Statement Management or through the Deposit List, click in the Statement Management field BEFORE selecting the format to which you wish to add the message.



4. Click on the File menu and Report Properties.

New Report Open Report	Ctrl+O	D	10		R D				
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5. Click on the Bands tab.

Report Properties		
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6. In the field labeled Selected Band, select the Transaction Detail Band.

Report Properties		
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Page Header	Selected Band	X Cancel
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7. Click on the up arrow next to the field labeled Band Height. This will increase the number listed in that field.

Report Properties		
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8. Click on OK.

Report Properties		
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9. You will now see that the Transaction Detail band has room to add another field. Please note: The space between transactions on your statements is now going to increase. This will reduce the number of transactions that will appear on a single page. This space will be there whether there is a Claim Rejection message or not. If you do not wish to have this space, you will need to change the Transaction Detail back to its original setting, and then make room on the band for a new field.

Page Header Practice Name	
Street 1	[Statement Date] [Chart Number]
Street 2	[Date of Report] [Chart Number]
City Line	
Phone	Make Checks Payable To
Full Name	Practice Name
Street 1	Street 1
Street 2	Street 2
DBText3	Phone Phone
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	[Previous Balance][P
[Patient] Full Name] [Chart Number] [2	Previous Balance][F
Patient:] Full Name] [Chart Number:] [[Case:] [Description] [Date of Last Pa	Previous Balance][F Chart] yment]Date of]Amount][Last]
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10. Click on the Insert Data Field icon in the toolbar at the top of the screen.

1	2	3	⁴ Data Field ⁵ ⁶
Practice Nam	ej		[Contraction 2] [Contraction
Street 1			
Street 2			[Date of Report] [Chart Numbe
City Line			
Phone			Make Checks Payable To
Full Name Street 1 Street 2 DBText3			Street 1 Street 2 Phone DBText9
Patient] Full Nan	ne] [Chart Nu	Previous Bal

11. After clicking on the Insert Data Field icon, click in the Transaction Detail band. You will see a new data field appear.

Page Header Practice Name	
Street 1	[Statement Date] [Chart Number]
Street 2	[Date of Report] [Chart Number]
City Line	
Phone	Make Checks Payable To
Full Nama	Practice Name
Street 1	Street 1
Street 2	Street 2
DBText3	Phone
	[DBText9]
	Previous Balance_[_ P
Patient: Full Name Chart Number: [Previous Balance;; P
Patient:] Full Name] [Chart Number:] [[Case:] Description] Date of Last Pa	Previous Balance;;[P Chart _] yment:]Date of Amount:]Last _]
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12. Double-click on the new data field. You can also right click on the field and click on Properties.

Page Header Practice Name			
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Full Name		Practice Name	
Street 1		Street 1 Street 2	
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Patient] Full Name Case] Description][Chart Number]] [Date of Last P	Çhart ayment:[Date of	∕Amount:][Last]
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Date From Procedure Amount	Insurance Insuranc	e 2 Insurance	DBText2 Adjustme
DBText7 DBText1			
Patient to Background Color			
Send to Back			
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Show Ruler			

13. Click on New Expression.

Data Field Properties		
Data Field and Expressions		V DK
New Data Field New Expression Edit Alignment Align to band when printing Center Align to band when printing Right Justified Replace Punctuation with: Position Replace Punctuation with: Left: 8 Top: 22	Delete	<u> Н</u> еір
Transparent Background	Background <u>C</u> olor	

14. Click on the Data button in the section of the screen labeled If.

Conditional Expression	is equal to	9 OK
✓ Value C Data Select Data Field	✓ Value ⊂ Data Select Data Field	🎗 Cancel
then print		Apply
	Value C Data Seject Data Field	D Help

15. In the Files column, highlight the Transaction File. In the Fields Column, highlight the Documentation Type field. Click on OK.

Files:	Fields:	
 Header Statement Total Case Insured 1 Insured 2 Insured 3 Statement Patient Custom Patient Data Custom Case Data Practice Billing Service Practice Transaction 	Diagnosis 4 Diagnosis 4 Description Diagnosis Code 1 Diagnosis Code 2 Diagnosis Code 3 Diagnosis Code 4 Document Number Documentation Dia Dia Dia Dia Dia Dia Dia Dia Dia Dia	OK Cancel Eind Field <u>Eind Field</u>
6006	🔽 Sort Fields	

16. In the section of the screen labeled is, make sure the drop down field is set to equal to. In the middle field, enter a capital S. Leave the radio button set to Value.

Conditional Expression		
- 14	is equal to	🜒 ОК
Transaction.Documentation Type	S	💥 Cancel
C Value Data Select Data Field		
then print		
1	Value C Data Select Data Field	D Help

17. Click on the Data field in the portion of the screen labeled then print.

Conditional Expression		
lf	equal to	Ø OK
Transaction.Documentation Type	S	💥 Cancel
C Value ● Data Select Data Field	🕫 Value 🔍 Data Siglect Data Field	
then print		Apply
1	Value C Data Seject Data Field	👩 Help

18. In the Files column, select Transaction. In the Fields column, select Documentation. Click

on OK.



19. Your Conditional Expression screen will look like the example below. Click on OK.

Conditional Expression		
- If	equal to	🕑 ОК
Transaction.Documentation Type	S	🎗 Cancel
○ Value Data Select Data Field	🕫 Value 🔍 Data Select Data Field	
then print		
Transaction.Documentation	C Value C Data Select Data Field	д <u>H</u> elp

20. Place a check mark next to the field labeled Auto Stretch.

Data Field Properties		
Data Field and Expressions If Transaction.Documentation Type = "S" then print Transaction.E	Documentation	0K
New Data Field New Expression Edit Alignment Align to band when printing Center Align to band when printing Right Justified Position Left: 8 Top: 22 Transparent Background	Delete	<u>ф</u> Help

21. Click on OK.

Data Field and Expressions If Transaction.Documentation Type = "S" then print Transaction.	Documentation	🕑 ОК
		X Cancel
New Data Field New Expression Edit		an Ush
Alignment Left Justified Center Right Justified 	Size Height: 17 Width: 70	CON Teb
Position Replace Punctuation with:	Auto Stretch	
	Font	

22. Click on the File menu and Save.

Open Report	Ctrl+O				
Close	Ctrl+F4			• •	
Save 0c	C(r)+S				
Jave As				[Statement Date]	Chart Number
Report Properties					Г
Program Options				[Date of Report]	Chart Number
Preview Report					
Print Report				Make Checks Payab	le To:
Export Report To Fil	е			Practice Name	
Printer Setup				Street 1	
Exit	Alt+F4			Street 7	
Street 2		•		Dhana	
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23. If you are modifying a Standard Form, you will be asked to save the changes under a different name. Enter the name you would like to assign to the Statement Format, and click on OK. Close out of the Report Designer.

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Depend Tille	Best Normellie, NorfAle normalie.	💥 Cancel
nepoli i lile	Report Title	

24. You will now need to set up the Claim Rejection Messages. Click on the Lists menu and Claim Rejection Messages.



25. Click on New.

🍿 Clain	Rejection Message	List		
Search	for:	Field: Rejection Code		•
Code	Rejection Message		Date Modified	*
	Edit New	Delete		*

26. In the Code field, enter a code to identify this rejection message. In the Message field, enter the Claim Rejection Message you wish to appear on a statement.



27. Repeat steps 25 and 26 for any additional messages you wish to send on statements.

28. When applying payments through the Deposit list, you will see a column labeled Rejection. In this field you will be able to enter any claim rejection codes that were entered in steps 25-27. The message will then appear under the transaction when printing the modified Patient Statement.

A	pp	y Payment	/Adjustme	nts to Cha	irges							
E	or:	Aetna AGADW000 Documentat	▼	ain, Dwight nent Procedu	ure Codes:	Ir Ir Ir	ns 1: Medica ns 2: Aetna ns 3: Ø DEDUC	are (MED01 (AET00)	NH → Ø	List Or ⊻iew So APWRO ❤	nly Ur Far 🔽	applied / Show <u>U</u> ▼ ♀
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		11/21/2002 11/21/2002 11/21/2002	99213 72052 97010	60.00 80.00 10.00	12.00 17.00 2.00				0.00 0.00 0.00			1 1 1
		Detions	There ar	\$0.00 e 3 charge e	\$31.00 Intries.	\$0.00 Iert When C Iert When S Ill Remainin Print Stateme	\$0.00 Claims Are Dor tatements Arr g Insurances ant Now	\$0.00 ne e Done Now	\$0.00	\$0.00 ayments/Adj	\$C ustments	.00