New Member Account Setup

*Follow these instructions carefully
once you have completed the*

NEW MEMBER WORKSHEET

*Have Any Questions?
Call 1-877-MEDRIUM*

MEDRIUM.com

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<u>STEP ONE</u> – ENROLLMENT

What you will need for <u>STEP ONE</u>:
- ■ The name, address, telephone number, fax number, and email of the contact person for this account.
- ■ The Administrator's chosen Medrium ID, password, and password hint.
- ■ A valid credit card (Visa or Master Card) with exact name and address as it appears on the credit card statement. (Required for verification purposes only. Nothing will be charged.)

"I think I am already enrolled."
You are already enrolled if:
- ■ You have a Medrium Account ID
- ■ You have a Medrium Login Name
- ■ You have already successfully given Medrium your credit card information.

If you have already enrolled, go to: www.medrium.com and click once on "Log In." Then use your account ID, your login name, and your password to log into your Medrium account. Then skip to **<u>STEP TWO</u>** of these instructions.

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* Required Fields

1)   Go to www.medrium.com and click once on "Enroll."
2)   * Read the terms and conditions of use and click once on "Accept" to accept the terms or "Decline" to decline.
3)   * Type the name and address of the contact person in the spaces provided.
4)   * Type the phone number (are code first) of the contact person in the space provided.
5)   Type the fax number and the email address of the contact person in the spaces provided.
6)   In the box titled "Account Type," select the option that most closely reflects the type of account you are setting up.
7)   * In the box titled "Select A User ID," type the User ID you wish to use when logging into Medrium.
8)   * Type the password for this ID. Then type it again.
9)   * In the box titled "Password Hint," type a word or phrase that will remind you what your password is if you forget it.
10)   * Type the credit card holder's name exactly how it is printed on the card.
11)   * Type credit card holder's address exactly how it appears on the statement.
12)   * Select the type of credit card you are using and type the sixteen-digit number in the space provided.
13)   * Type the expiration date in the spaces provided.
14)   Type the referral number of your account representative in the space provided.
15)   Click once on "Enroll."

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STEP TWO — ADDING BILLING PROVIDERS

What you will need for <u>STEP TWO</u>:
■   The completed **pages 7-8** of your Medrium New Member Worksheet.

Enter Your Billing Providers

1) Turn to **<u>SECTION II</u>, page 7** of your New Member Worksheet.

2) Click once on "Maintenance."

3) Click once on "Providers."

4) Click once on "Add New Provider."

5) Under the heading, "Name And Address Of Provider," type the name, address, phone number, and fax number from **page 7, lines 1a-1c** of your worksheet.

6) Under the heading, "Professional Information," make sure that the Provider Type, "Billing Provider" is **checked**. It is also recommended that you check the option, "Referring Provider" as well for all your billing providers.

7) In the box titled "Specialization," select the provider's specialty from **page 7, line 1d** of your worksheet.

8) In the box titled "State License No," type the provider's State License Number from **page 7, line 1f** of your worksheet.

9) In the box titled "Specialty License No," type the provider's Specialty License Number (if any) from **page 7, line 1d** of your worksheet.

10) In the box titled "Tax ID," type the provider's Tax ID from **page 7, line 1e** of your worksheet. Select the option "Social Security Number" or "Employer ID Number."

11) In the box titled "UPIN," type the UPIN from **page 7, line 1f** of your worksheet.

12) Click once on "Add."

Congratulations. You have just added your first billing provider. Repeat the above steps for **Provider #2, Provider #3 and Provider #4** on **pages 7 and 8** of your worksheet.

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STEP THREE – ADDING REFERRING PROVIDERS

What you will need for STEP THREE:
■   The completed **pages 9-10** of your Medrium New Member Worksheet.

Enter Your Referring Providers

1) Turn to **SECTION III, page 9** of your New Member Worksheet.

2) Click once on "Maintenance."

3) Click once on "Providers."

4) Click once on "Add New Provider."

5) Under the heading "Name And Address Of Provider," type the provider's name, address, and phone number from **page 9, lines 1a-1c** of your worksheet.

6) Under the heading "Professional Information," make sure that the Provider Type, "Billing Provider" is **unchecked** and that Provider Type, "Referring Provider" is **checked**.

7) In the box titled "UPIN," type the provider's UPIN from **page9, line 1c** of your worksheet.

8) Click once on "Add."

Congratulations. You have just added your first referring provider. Repeat the above steps for **referring providers 2-6** on **pages 9 and 10** of your worksheet.

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<u>STEP FOUR</u> – ADDING USERS

What you will need for <u>STEP FOUR</u>:
■   The completed **pages 5-6** of your Medrium New Member Worksheet.

<u>Add Users To Your Medrium Account</u>

1) Turn to <u>**SECTION I,**</u> **page 5** of your New Member Worksheet.

2) Click once on "Maintenance."

3) Click once on "Add User."

4) In the box titled "User ID," type the first user's User ID from **page 5, line 1b** of your New Member Worksheet.

5) In the box titled "User Type," select the user type from **page 5, line 1d** of your worksheet.

6) In the box titled "Password," type the user's Password from **page 5, line 1c** of your worksheet.

7) In the box titled "Password Again," type the user's Password a second time from **page 5, line 1c** of your worksheet.

8) In the box titled "Password Hint," type a word or phrase that will remind the user of his/her password if he/she forgets it.

9) In the box titled "Allow Access To," select the provider this user should have access to. If this user should have access to all providers, select the option "All Providers."

10) Click once on "Add."

Congratulations. You have just added your first user. Repeat the above steps for **Users 2-7** on **pages 5 and 6** of your worksheet.

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STEP FIVE — ADDING LOCATIONS

What you will need for STEP FIVE:
■ The completed **pages 11–12** of your Medrium New Member Worksheet.

Add Your Locations

1) Turn to **SECTION IV, page 11** of your New Member Worksheet.

2) Click once on "Maintenance."

3) Click once on "Facilities."

4) Click once on "Add New Facility."

5) In the box titled "Facility Name," type the name of Location #1 from **page 11, line 1a** of your New Member Worksheet.

6) In the box titled "Organization Name," type the organization name from **line 1b** of your worksheet.

7) In the box titled "Type," select the Location Type from **page 11, line 1c** of your worksheet.

8) Type the location address, telephone number, and fax number in the spaces provided from **page 11, lines 1d-1e** of your worksheet.

9) In the box titled "CLIA Number," type the location's CLIA Number (if any) from **page 11, line 1f** of your worksheet.

10) In the box titled "Place of Service," select the place of service for this location from **line 1g** of your worksheet.

11) Click once on "Add."

Congratulations. You have just added your first Billing Location. Repeat the above steps for **Location #2 and Location #3** on **page 12** of your worksheet.

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<u>STEP SIX</u> — ADDING INSURANCE

What you will need for <u>STEP SIX</u>:
■   The completed **pages 13-14** of your Medrium New Member Worksheet.

<u>Add Your Insurance Carriers</u>

1)   Turn to **<u>SECTION V</u>, page 13** of your Medrium New Member Worksheet.

2)   Click once on "Maintenance."

3)   Click once on "Insurance."

4)   Click once on "Add."

5)   Use the search option to search Medrium's database of insurance carriers. In the box on the right, type the **Insurance #1 Name** from **page 13, line 1a** of your New Member Worksheet. (For Blue Cross and Blue Shield, use BC and BS.)

6)   Click once on "Search."

7)   Select the insurance carrier by clicking once in the box to the left of the carrier's name.

8)   Scroll down to the bottom of the list and click once on "Add."

Congratulations. You have just added your first insurance carrier. Repeat the above steps for **Insurance #2, Insurance #3, Insurance #4** and **Insurance #5** from **pages 13-14** of your worksheet.

<u>"What If I Search The Medrium Database And I Can't Find The Right Carrier?"</u>

1)   Click once on "Add New."

2)   In the box titled "Insurance Name," type the name from **line 1a** of your New Member Worksheet.

3)   In the box titled "Insurance Type," select the insurance type from **line 1b** of your worksheet.

4)   Type the claims address and telephone number in the spaces provided from **lines 1c-1e** of your worksheet.

5)   Click once on "Add."

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FINAL STEP — PROVIDER NUMBERS

What you will need for the FINAL STEP:
■ The completed **pages 16-27** of your Medrium New Member Worksheet.

Specify Your Provider Numbers

1) Turn to **SECTION VI, page 16** of your Medrium New Member Worksheet. If page 16 is crossed out, skip to page 17. If page 17 is crossed out, skip to page 18, and so on. Disregard and skip any pages in **SECTION VI** of your worksheet if it is crossed out or if there is no information.

2) Click once on "Maintenance."

3) Click once on "Provider Numbers."

4) In the box titled "Facility," select the Location from **line 1** of your worksheet.

5) In the box titled "Provider," select the Provider from **line 1** of your worksheet.

6) Click once on "Update Provider Numbers."

7) If you get a message saying that this provider is not a member of this facility, click once on "Add Provider To Facility."

8) In the box titled "Tax ID," type the Tax ID from **line 1a** of your worksheet. Then select weather it is a Social Security Number or a Provider Identification Number.

9) In the box titled "Medicare Number," type the Medicare Number from **line 1b** your worksheet.

10) In the box titled "Medicaid Number," type the Medicaid Number from **line 1b** of your worksheet.

11) In the box titled "Champus Number," type the CHAMPUS Number from **line 1c** of your worksheet.

12) In the box titled "Blue Shield Number," type the Blue Shield # from **line 1c** of your worksheet.

13) Under the heading "Payments Sent To The Address Below," type the Name and Address from **lines 1d-1e** of your worksheet.

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14) In the boxes under the heading "Provider ID," type the Provider ID (if any) for each corresponding insurance carrier on the right. Use the Provider ID's from **lines 1f, 1g, 1h, 1i, 1j** of your worksheet.

Important: Your Insurance names may NOT appear on your screen in the same order they appear in your worksheet.

15) In the boxes under the heading "Group/EMC ID," type the Group Numbers (if any) for each corresponding insurance carrier on the right. Use the Group Numbers from **lines 1f, 1g, 1h, 1i, 1j** of your worksheet.

Important: Your Insurance names may NOT appear on your screen in the same order they appear in your worksheet.

16) Scroll down to the bottom of the page and click once on "Update."

Congratulations. You have just specified your provider numbers for your first provider when he/she performs services at your first facility. Repeat the above steps for **pages 17-27** of your worksheet. Disregard any pages that you have crossed out or any pages where there is no information.

Once you have finished, you may immediately begin adding patients. Click once on "Patients," then click once on "Add New Patient."

To submit a claim, click once on "Claims," then click once on "Add Claim."

<u>ONE MORE THING</u> – USING ONLINE SUPER-BILLS

Do you frequently use the same diagnosis and procedure codes on nearly every claim you submit? If your answer is "yes," then the Medrium online super-bill or "e-bill" might be right for you.

The Medrium e-bill is an online form that you create and use to suit your specific needs. Each e-bill you create will have a list of ICD-9 and CPT codes and the charges for those codes. These forms will greatly decrease the amount of data entry required for claim submission since they allow you to simply choose the diagnoses and procedures from your own list and claims are generated automatically from the information you've previously specified.

And because you create as many e-bills as you need, the time saving possibilities are endless. Potentially, you could use a different list of codes for each provider, location, type of service or any combination of the three.

If you already are using a paper super-bill, the best way to start out is to create an e-bill that is an exact replica of your existing one. You can always change your e-bill later or add new ones. If you do not have an existing super-bill, you will need the following to create an e-bill:

- A list of your most commonly used ICD-9 codes with brief descriptions
- A list of your most commonly used CPT and HCPC codes with brief descriptions.
- A list of charges for each procedure code on your list.

Once you have prepared the above information, use the "Medrium E-Bill Wizard" to create your first e-bill. The wizard breaks the entire process of creating an e-bill into the following five steps:

1) **Begin:** Give your e-bill a name and choose a layout.
2) **Add/Remove Diagnoses:** Add ICD-9 codes to your e-bill with descriptions.
3) **Add/Remove Procedures:** Add CPT & HCPC codes to your e-bill with descriptions and charges.
4) **Edit:** Review the codes, descriptions and charges you have added to make sure that they are correct.
5) **View:** See what the final result looks like.

To add an e-bill with the E-Bill Wizard, click once on "Maintenance," the once on "E-Bill Templates" and once on "Add E-Bill Template."

Once you have finished, you may use your e-bill to add a claim by clicking once on "Claims," then once on "Add Claim" and once on "E-Bill."

Thank you for choosing Medrium as your solution to healthcare practice management.
Good Luck!

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