

Empowering Physicians  
at the *Point of Contact*



CareVoyant  
Integrated Software for Healthcare

## Physicians

Does your software really help you *manage* your practice?

### Comprehensive Healthcare Solutions

CareVoyant's Practice Management and EMR solution streamlines your practice's workflow. By integrating scheduling, billing and clinical functions with a portable EMR, CareVoyant reduces a physician's documentation time, expedites the review of histories, notes and medications and simplifies E&M coding. Additionally, CareVoyant business intelligence tools monitor your practice's key clinical and financial indicators to improve quality of care and optimize reimbursement.

### CareVoyant will empower your practice to:

- Seamlessly register, schedule, code and bill
- Eliminate redundant paperwork and data entry
- Quickly identify and correct exceptions and trends

### CareVoyant Business Intelligence tools monitor clinical and financial indicators to:

- Improve Quality of Care
- Optimize Reimbursement
- Spot Trends, Exceptions & Outliers before they become more serious problems

### Call us today for a demonstration of how CareVoyant's comprehensive modules will empower your practice to:

- Eliminate coding errors that erode reimbursement
- Personalize clinical templates for your practice — ensuring consistent, accurate documentation
- Seamlessly exchange information between patients, practices, pharmacies and payers
- Pro-actively filter insurance claims for exceptions and prompt office staff to correct them
- Use management and functional dashboards to identify key trends and exceptions

System Manager  
Patient Registration  
Scheduling  
EMR/E&M Coding  
Billing/AR  
Elec Remittance  
Collections  
Reporting  
Document Mgmt  
Dashboard  
Business Solutions  
Integration



## ■ System Manager ■

System Manager is both the foundation and backbone of CareVoyant's various modules and functions. To provide an intuitive and familiar work environment, this core application emulates the 'look and feel' of Microsoft Office Outlook. System Manager streamlines navigation by enabling easy access to CareVoyant functions, reports and external programs from the home page. System Manager also gives organizations the option to link login permissions to Microsoft Active Directory in addition to providing features that help develop menu and form security by user role.

System Manager includes a Modifier tool that can be used to customize the data entry screens by hiding or rearranging fields. Additionally, an Import tool allows users to import data into CareVoyant tables. The solution enables users to launch CareVoyant Reports quickly from the Home Page — including reports created using Crystal Reports and Microsoft SQL Server Reporting Services. Through its intuitive work environment and productivity tools, CareVoyant empowers everyone in the organization to accomplish more every day.

### Solution navigation features include:

- A customizable role-based home page that provides users an intuitive work environment by grouping menu items, user tasks and quick links to external programs
- Shortcuts and process menus that improve productivity by grouping commonly used programs, functions and reports — by user or user role
- Links on the home page to Microsoft Outlook Inbox and Calendar
- Quick Links to access external programs
- A Process Menu feature that provides the ability to group related functions together — and thereby avoid missing any steps
- User Tasks that can be used to schedule task reminders and assign reminders to specific users for follow up actions
- The ability to launch reports quickly from the CareVoyant Home Page including reports created using Crystal Reports and Microsoft SQL Server Reporting Services
- A Modifier that enables users to rearrange data entry screens by hiding or moving the position of fields

### Security features include:

- Login permissions that can be linked to Active Directory to use Microsoft Windows user management functions
- Set up menu and form access rights that are easily configurable by user or user roles
- The ability to setup a single database for multiple lines of business — or separate databases for each line of business
- The ability to limit access to users by line of business, location or database
- HIPAA related audit functions that track user logins and table changes



## ■ Patient Registration ■

CareVoyant Patient Registration functions enable health care providers to establish a single patient record for multiple lines of business and for multiple episodes of care. CareVoyant's single patient record gives organizations the ability to consolidate all the clinical and financial records for a patient across the continuum of care. The consolidation of all patient information — including demographic, insurance, diagnosis, clinical and billing data — that is collected at registration and throughout the length of care, eliminates redundant data entry as the patient moves along the continuum of care.

### Patient Registration features include:

- The ability to establish and maintain a single patient record across multiple lines of business and multiple episodes of care
- The ability to collect clinical and insurance coverage information and verify eligibility before admitting the patient
- The automatic flow of patient information to other modules — which eliminates errors and redundant data entry
- The ability to consolidate clinical and financial records for a patient across the continuum of care
- The ability to eliminate redundant data entry when a patient returns for multiple episodes of care — or for a different line of business
- The ability to incorporate user-defined face sheets and forms during the registration process
- The ability to attach scanned images to patient records
- The ability to transfer patient information from Pre Admit module
- The ability to import patient information from third-party systems — using SQL or HL7 Interface



## Scheduling

CareVoyant Scheduling Module enables outpatient practices to create and manage patient schedules for physicians and office resources — such as examination rooms and equipment. CareVoyant Scheduler is a powerful tool that automates complex, multi-resource scheduling through graphically-oriented, color-coded calendar and appointment screens. Integration of scheduling functions with patient registration, clinical notes (EMR) and billing streamlines workflow within the practice. Outpatient Workflow is used to view physician schedules, quickly capture procedure and diagnosis codes and create charges for patient visits.

### Scheduler:

- Includes views by day, week, month and appointment list
- Ability to view schedules for multiple resources in one view
- Ability to maintain physician's office hours and types of visits by time slot
- Ability to block physician time slots with reason codes
- Ability to cut, copy and paste existing appointments
- Ability to track and maintain authorized and remaining visits for a patient
- Ability to find available resources for selected day, time and schedule reason code
- Ability to schedule multiple appointments for the same time slot
- Ability to maintain holiday and vacation schedules
- Ability to track re-schedules/cancels/deletes by patient
- Ability to select resources by user — creating a multi-resource schedule view
- Ability to manage visits, enter procedure codes and create charges for the day
- Ability to accept payment at the beginning of the visit
- Ability to track activities during the patient visit



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## ■ Electronic Medical Records ■

CareVoyant EMR Module enables practices to implement electronic medical records by simplifying the migration of current clinical documentation processes and forms into CareVoyant — making the transition easy for physicians. The CareVoyant Clinical Engine includes the ability to personalize documentation steps — by customizing standard templates by specialty, physician, schedule reason or type of visit (New/Established). CareVoyant Assessment Builder allows physicians to develop clinical documentation forms from the ground-up in CareVoyant.

Clinical functions tightly integrate with patient registration, scheduling and billings functions — thereby eliminating redundant data entry. E&M Coding features derive the level of office visit code from clinical documentation. Remote computing features, based on laptop or tablet PC devices, extend all clinical capabilities to the point of care through wireless or synchronization technology. An integrated Drug Database gives physicians comprehensive drug reference materials, such as drug interaction and patient education materials. CareVoyant provides the ability to create charges based on the diagnosis codes and procedure codes captured in clinical documentation. CareVoyant Clinical Reports and Dashboards enable practices to quickly analyze their business and clinical performance.

### Clinical Engine

- Integrated Clinical Engine to create, view, manage and share clinical data across the continuum of care
- Tight integration with registration, scheduling and billing functions
- Outpatient Workflow lists all appointments and provides access to patients' clinical and financial information
- User-definable clinical templates and documentation steps by specialty, physician, schedule reason and type of visit (New/Established)
- Ability to migrate current clinical documentation forms — thus making the transition easy for physicians
- Ability to view patients' problems, past medical history, family and social history from a clinical notes screen
- Ability to stay in one screen to complete the clinical note for the patient
- Ability to derive E&M Coding from the clinical documentation
- Ability to enter diagnosis & procedure codes during clinical documentation and create charges
- Ability to enter prescriptions and other physician orders and check for drug interactions
- Ability to view and manage clinical notes using Clinical Notes Manager
- Ability to set-up thresholds for vitals and user-defined measurements
- Ability to digitally sign clinical notes to complete the process
- Dashboards (CareVoyant Insight) can be used to analyze and trend clinical information



## ■ Electronic Medical Records (Continued) ■

### Point of Care

- Point of Care function extends clinical documentation to the point of care – wherever the patient is
- Ability to add, modify and view schedules at the point of care
- Retains the same user interface and functionality as central office clinical functions
- All clinical information, including notes from other clinicians, are be available at the point of care
- Schedules form the base for synchronization
- Ability to effectively manage clinical functions through role-based clinical dashboards and reports

### Drug Database

- Uses First Data Bank drug database
- Provides access to comprehensive drug list and reference information to the clinician
- Automatically check medications for drug interactions
- Provides access to patient education materials



## ■ Billing/AR ■

CareVoyant Billing and Accounts Receivable module is an integrated healthcare billing engine capable of managing disparate payer requirements across multiple lines of business. CareVoyant provides effective revenue cycle management by integrating patient registration, eligibility verification, scheduling, claims management, electronic remittance and collections management functions.

CareVoyant Claims Scrubber includes user-definable claims validations, along with the claims management tools, that enable practices to send clean claims and reduce collections time and effort. Electronic remittance functions enable practices to post payments electronically, thereby eliminating errors and redundant data entry. CareVoyant Financial Reports and Dashboards enable practices to quickly analyze their financial performance.

### CareVoyant Billing / AR:

- CareVoyant Billing Engine brings together billing requirements for multiple lines of business
- Integrates registration, eligibility verification, scheduling, billing, electronic remittance and collections
- Ability to maintain unlimited plans per patient
- Ability to maintain fee schedules for insurance plans
- Supports ANSI 270/271 for Eligibility Verification
- Ability to handle billing for Medicare PPS, Private Duty and Hospice
- Ability to handle UB04 and 1500 requirements together
- Ability to handle electronic (ANSI 837) and paper formats
- Ability to adjust claim formats to meet insurance plan requirements
- Claims Scrubber built-into claims management functions
- Ability to correct claim errors as part of the claims processing function
- Automatic generation of secondary claims
- Statement functions manage private pay patients
- Supports ANSI 835 for Electronic Remittance functions
- Collections Manager manages the claims & account collection process



## ■ Electronic Remittance ■

CareVoyant Electronic Remittance Notice (ERN) module enables practices to receive electronic remittance advice from intermediaries in ANSI 835 format and post payments automatically. The Module allows facilities to review imported payments before posting them to patient accounts. ERN also saves Coordination of Benefits information for the claims — enabling CareVoyant to send secondary claims electronically.

### CareVoyant ERN

- Ability to receive and import Electronic Remittance Notice in ANSI 835 format from intermediaries
- Ability to review imported payments — before posting them to patient accounts
- Ability to skip claims based on a claim adjustment code
- Ability to skip claim or service line adjustments based on an adjustment code
- Ability to save Coordination of Benefits information for secondary claims
- Ability to inquire and print past Remittance Advices — by batch, patient or claim
- Ability to post payments at the claim level or at the service line level
- Ability to move claims to collections module based on denial codes
- Ability to receive and post interest payments
- Ability to easily identify and manage unmatched items
- Eliminates redundant data entry and errors
- Ability to rollover responsibility to secondary payers





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## ■ Collections ■

Collection Management Module provides practices the tools to identify and manage overdue claims and accounts. The Module automatically assigns qualifying claims and accounts to collections status based on a pre-defined schedule and other criteria. Claims and account information can be accessed from the Collection Manager, enabling the collector to complete the process in one screen. Activities can also be created and managed for each claim and account from Collection Manager.

### Collections Module:

- Collection Manager is integrated with Billing and Accounts Receivables functions
- Automatically assigns qualifying claims to Collections Manager based on pre-defined schedule and criteria
- Collects and lists all claims not paid after expected payment days in plan code
- Ability to track and manage collections for claims — by collector or collection group
- Activities can be attached to claims or accounts for follow-up
- Activities Manager manages collector's activities
- Access to patient inquiry and other screens
- Claims can be queued-up for re-submission from the Collection Manager
- Claims can be moved to collection manager from ERN based on adjustment codes
- Claims can be moved to collection manager from EOB Payment Entry screen
- Dashboard Cubes and Reports are available to monitor collection activities



## ■ Reporting ■

CareVoyant includes an extensive library of clinical, financial, scheduling and census reports. A Reports Manager enables practices to group and manage reports based on individual user or user roles. Reports can be added to a user's home page for easy navigation and access. The system's open architecture design allows practices to modify existing reports and create online reports using Microsoft Reporting Services technology — thereby providing for virtually unlimited reporting options.

### CareVoyant Reports:

- Reports can be grouped and assigned by user roles or individual users
- The Report Manager displays all available reports for the user
- Reports can be modified and saved in a pre-defined location
- Report Manager allows the user to access either the original or a modified report
- Data from multiple companies can be combined into one report
- Ability to set-up a reporting database — as well as select a specific database for each report
- Deployment of reports over the web using Report Server
- Selection Criteria can be defaulted or saved by user
- Reports can be saved as PDF, CSV, Excel, TIFF or XML files
- Options to e-mail reports as attachments or as links



## ■ Document Management

The CareVoyant Document Management Module allows practices to scan paper documents or attach electronic documents to patients. Once in the system, these documents can be categorized, stored, retrieved and distributed, thereby saving office space, increasing staff productivity, reducing retrieval time and improving patient services. In conjunction with CareVoyant clinical module, CareVoyant Document Imaging and Management Module enables practices to drastically reduce paper documentation — by scanning original paper documents and attaching them, along with other electronic files, directly to the patient record.

For practices with thousands of patients, using a document management program to organize, index and access their documents is an absolute necessity. An effective patient records management system can produce immediate improvements in time savings, profitability and staff productivity. Imagine the efficiencies your practice could achieve if staff handled paper documentation only once and, afterwards, it was never misplaced and was always accessible from within the patient's electronic health record.



### Benefits include:

- Improved access to patient information
- Documents can be attached to different levels (Patient, Admission, Clinical Notes, Etc)
- Eliminate paper-based filing systems
- Store and retrieve documents of all varieties — including patient face sheets, clinical charts, x-rays, photos, insurance cards, lab results and EOBs
- Enterprise-wide availability combined with powerful security features that restrict access to authorized users only
- Powerful categorization and file name search capabilities



## ■ Insight (Digital Dashboards) ■

CareVoyant Insight is a business intelligence dashboard built on Microsoft SQL Server Analysis Services technology to monitor key trends and exceptions — both clinical and financial. CareVoyant Dashboards distill, analyze and graphically display healthcare providers' key performance metrics. By providing timely insight into clinical and business performance, they empower providers to pro-actively identify trends and exceptions and help improve care and optimize reimbursement.

The use of Microsoft Excel as the dashboard foundation enables healthcare providers to view and manipulate dashboard charts with familiar tools. CareVoyant Insight comes with a pre-defined set of charts that enable health care providers to get the benefits of dashboards immediately after going live. Dashboard views can be configured based on user roles, enabling the promotion of best practices throughout the organization.



### CareVoyant Dashboard

- Ability to create financial, clinical and exception-based dashboard charts
- Ability to use dashboard charts to manage day-to-day operations
- Ability to gain insight into business and clinical performance through dashboard charts
- Ability to summarize and analyze data in multiple dimensions using Excel
- Ability to view Key Performance Indicators at a high level
- Ability to trend performance metrics based on user-definable time intervals
- Ability to configure dashboard views based on user roles — enabling everybody in the organization to benefit from the dashboard
- Ability to integrate data from third-party applications
- Ability to personalize charts using Microsoft Excel
- Use of Microsoft Analysis Services and Excel enables users to customize dashboard charts easily



## ■ Business Solutions Integration ■

The CareVoyant Business Solutions Integration is a comprehensive vehicle for interfacing CareVoyant with third-party financial systems, particularly General Ledger and Payroll. CareVoyant General Ledger Interface groups general ledger transactions in batches that are automatically subjected to a detailed validation process before being sent to a third-party General Ledger System. CareVoyant Payroll Interface creates payroll transactions triggered by CareVoyant schedule transactions. CareVoyant can directly write GL and Payroll transactions to Microsoft Dynamics GP. For other third-party financial systems, CareVoyant creates an ASCII file that can be imported.

