Duxware Training Module

Agenda

1. Access & Login
2. Initial Verification & Demographics Check
3. Insurance & Authorizations (Required Entry)
4. Insurance Policy Verification
5. Payments (Credit Card Use Only)
6. Reports & Administrative Views
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Simplifying What Matters Most

Access & Login

- Use assigned Duxware URL and credentials.
- Use "Forgot Password" if needed; contact ALS Billing if locked out.
- Always log out when leaving your workstation.
- HIPAA: never share credentials.

Initial Verification & Demographics

- Name: Must exactly match insurance card (not ALL CAPS).

- Address: Current, punctuated correctly; avoid abbreviations.

- Policy & Group #: Match the card, NO dashes, use CAPITAL LETTERS.

- Check insurance expiration date; set to D – Depreciated if inactive.

- Cross-check with OptimisPT for consistency.

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Notes Tab (Billing Communication)

- At the **bottom of the Dashboard**, there is a **Notes** tab
  - **Always check the Notes tab first** before sending an email with a question—**the answer may already be documented** there.
- You can **see billing progress** for a patient (e.g., claim status, requests for information).
- If a patient has called the **billing department**, the **call is recorded here** along with the **question and the resolution**.
- You may also see a **follow-up date** indicating when billing will check back on the item.
- If there are **no notes**, the billing team has **no current issues** on the account.
- **Best Practice:** Read the latest notes before contacting Billing or the patient—this prevents duplicate outreach and ensures consistent messaging.

Authorizations – REQUIRED in Duxware

- Authorizations do NOT flow from OptimisPT.

- Enter before billing or claims will be denied.

- Two paths to add:
  - Insurance/Authorization tab
  - Dashboard → Authorization → Add

- Enter: Auth #, start/end dates, visit limits; save & verify link.

Authorization Entry – Quick Checklist

- Open patient → Insurance/Authorization or Dashboard → Authorization → Add
- Enter Auth #, dates, visit count
- Cross-check with OptimisPT
- Save → Confirm authorization appears on account
- Escalate discrepancies to ALS Billing

Insurance Policy Verification

- Review filing order: Primary → Secondary → Tertiary.
- If Secondary is set to Primary, correct it.
- Ensure copay & deductible amounts are present.
- Policy/Group #: NO dashes, CAPITAL LETTERS.
- If coverage not valid: set Filing Order to D – Depreciated.

Payments – Duxware Merchant Account Active

- **Use for CREDIT CARDS only.**
- Therapist should be Collections Daily.
- Copay credit: applies to specific DOS only.
  - Notes must list EACH exact DOS (e.g., 10/5, 10/7, 10/9, 10/12).
  - Do NOT use vague notes like "for next four DOS".
- Patient Account payment: Billing applies oldest DOS → forward (no DOS in notes).

Payments – If Merchant Account is NOT Used

- **Do not enter payments in Duxware.**
- All payments go into OptimisPT only; ALS Billing posts to Duxware.
  - Patient Account payment: Billing applies oldest DOS → forward (no DOS in notes).
  - Copay credit: specific DOS only; list each DOS in notes.

Reports & Administrative Views

- Billing department: runs **monthly** reports for reconciliation.
- Office weekly balances: Reports → Collections → Statement History.
- Print/review as needed; escalate issues to ALS Billing.

Patient Ledger & Statements

- Open patient → Ledger / Patient Statements.

- Review DOS, payments, adjustments, balances.

- Hover over ★ in MSG column to see payer message.

- Use MSG info to explain balances (e.g., deductible, non-covered, auth).

- Document unclear items and notify ALS Billing.

Support & Troubleshooting

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- Verify issue isn't OptimisPT data first.
- Capture error message/screenshot.
- Email Support@ALSIntegratedSvc.com or call 513-334-8199.
- Include: patient FULL NAME (or acct #), DOB, issue summary, screenshots.

Compliance & Security

- Minimum necessary access to PHI.
- No PHI in public areas.
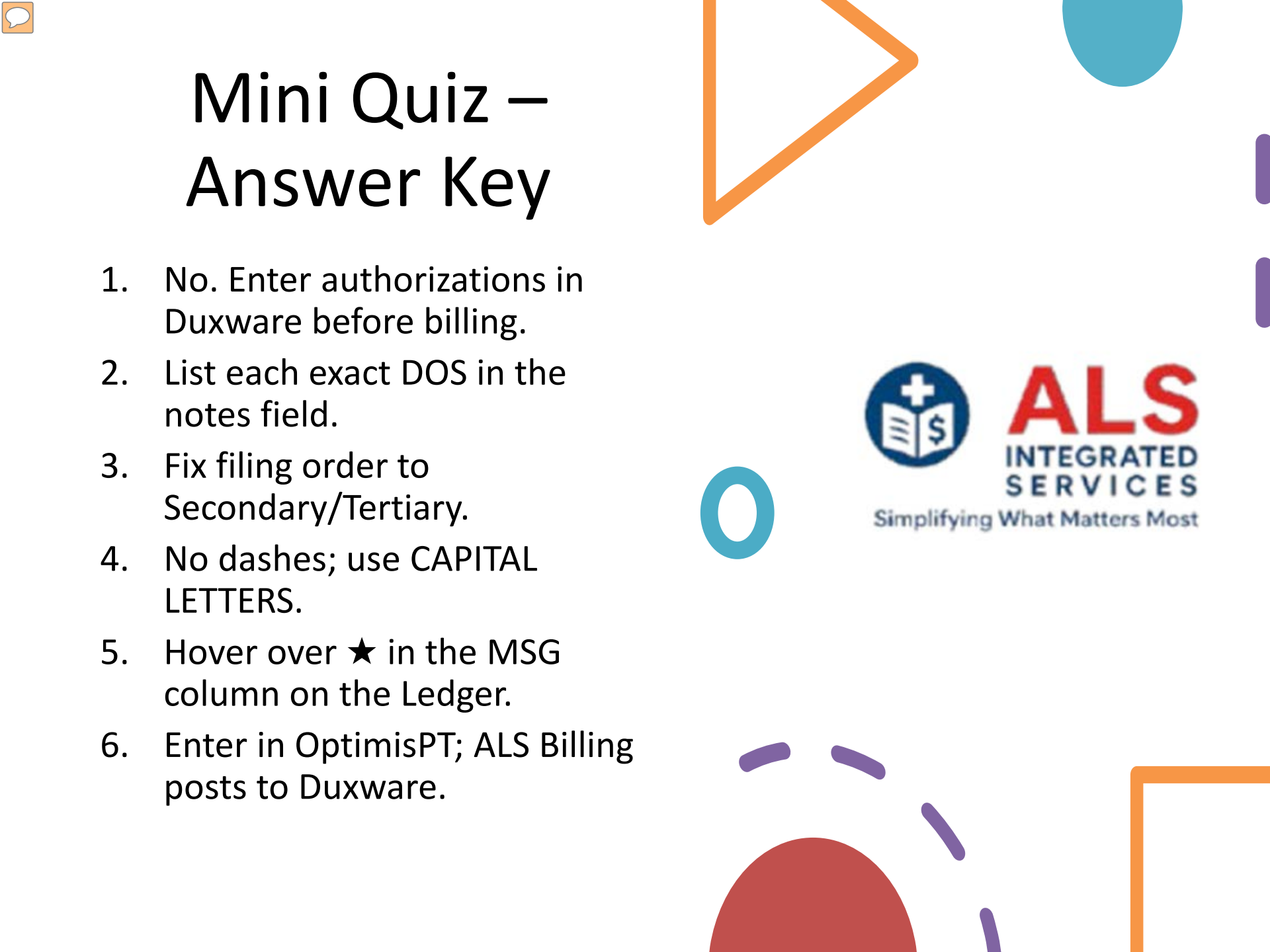- Share screenshots securely only with Billing.
- Always log out after use.

Mini Quiz (Front Desk & Support)

1. Do authorizations flow from OptimisPT into Duxware automatically?

2. For a copay credit covering multiple visits, what must be in the notes?

3. What should you do if a Secondary plan is marked as Primary?

4. Policy/Group formatting: symbols allowed? casing?

5. Where do you find insurance messages explaining balances?

6. If Merchant Account is not used, where are payments entered?

Mini Quiz – Answer Key

1. No. Enter authorizations in Duxware before billing.
2. List each exact DOS in the notes field.
3. Fix filing order to Secondary/Tertiary.
4. No dashes; use CAPITAL LETTERS.
5. Hover over ★ in the MSG column on the Ledger.
6. Enter in OptimisPT; ALS Billing posts to Duxware.

Front Desk Checklist — Duxware

- **Initial Verification:** Name matches insurance (not ALL CAPS); address punctuated; policy & group # match card (NO dashes, CAPITAL LETTERS); expiration date valid.
- **Insurance Policy:** Filing order correct (Primary/Secondary/Tertiary); copay & deductible listed; invalid plans set to D – Depreciated.
- **Authorizations:** Enter in Duxware BEFORE billing (Dashboard → Authorization → Add or Insurance/Authorization tab).
- **Payments (Merchant Active):** Credit cards only; Collections Daily; Copay credit lists each DOS; Patient Account has NO DOS in notes.
- **Payments (No Merchant):** Enter all payments in OptimisPT; Billing posts to Duxware.
- **Reports:** Weekly balances via Reports → Collections → Statement History (Billing handles monthly).
- **Ledger:** Hover ★ in MSG column to read payer message; explain balance; escalate unclear items to Billing.
- **Support:** Email Support@ALSIntegratedSvc.com or call 513-334-8199; include patient full name or account #, DOB, issue summary, screenshots.