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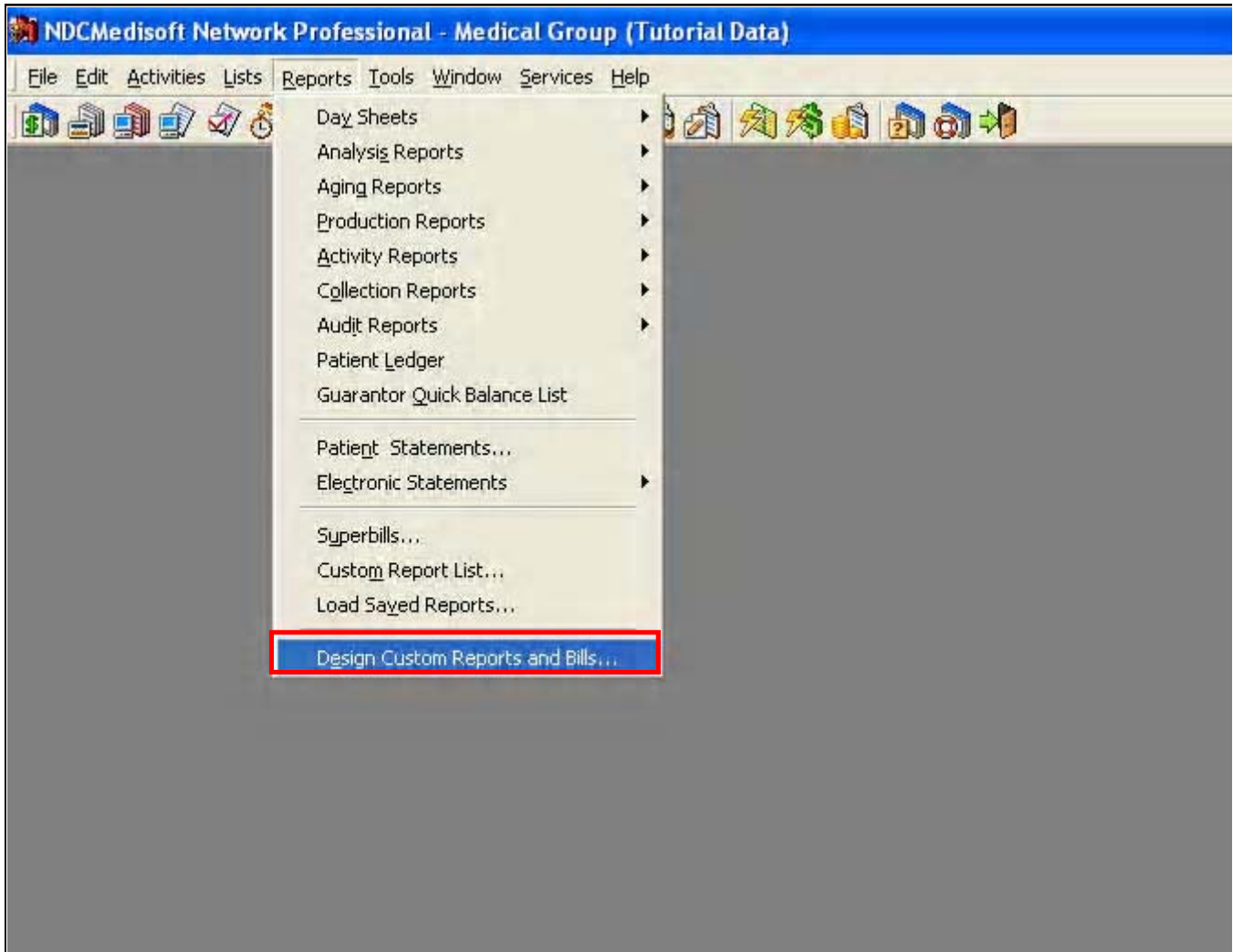
2. Click on the File menu and Open Report.
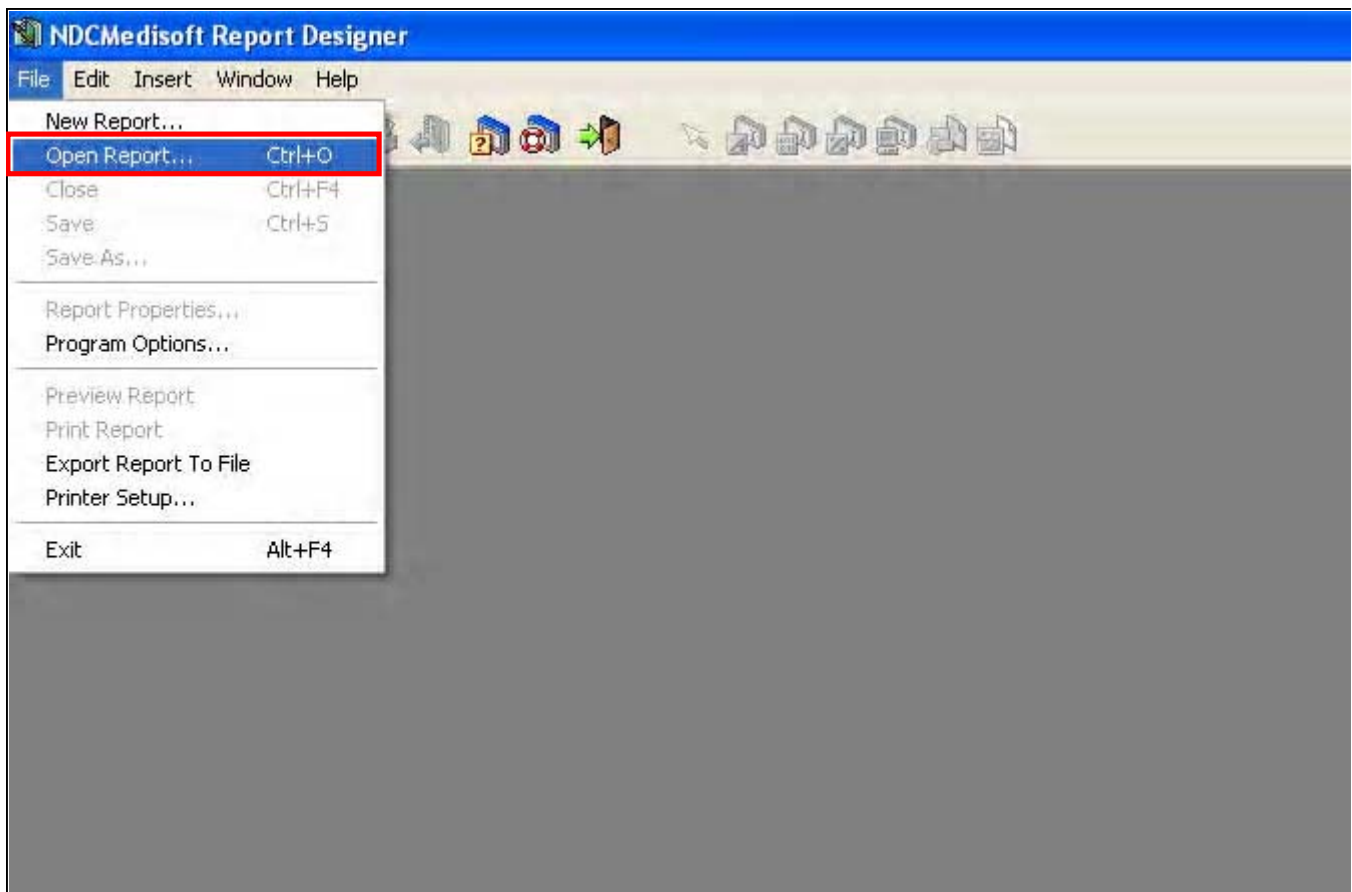
3. In the Open Report window, click on the Statement format to which you wish to add the Claim Rejection message, and click on OK. If you send your statements using Statement Management or through the Deposit List, click in the Statement Management field BEFORE selecting the format to which you wish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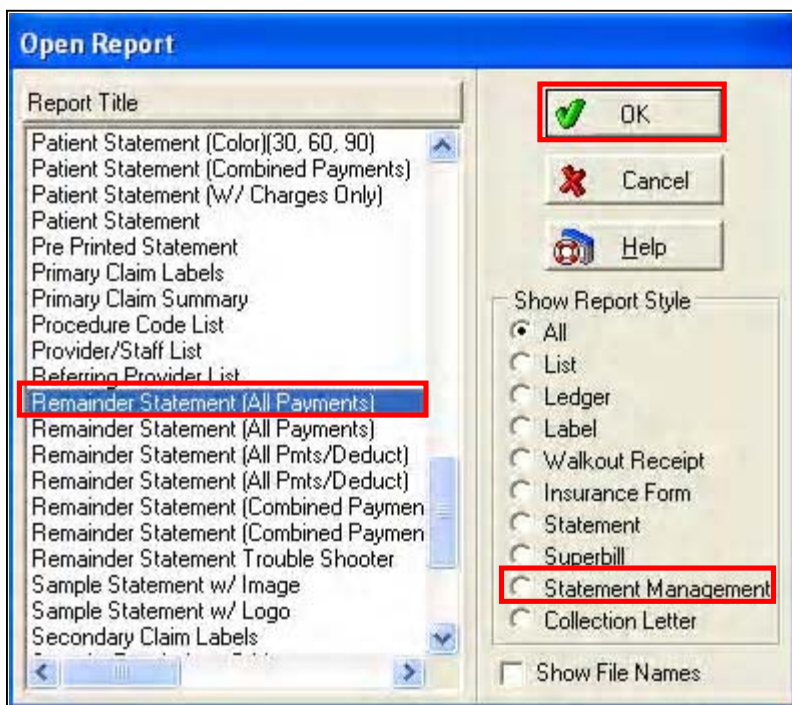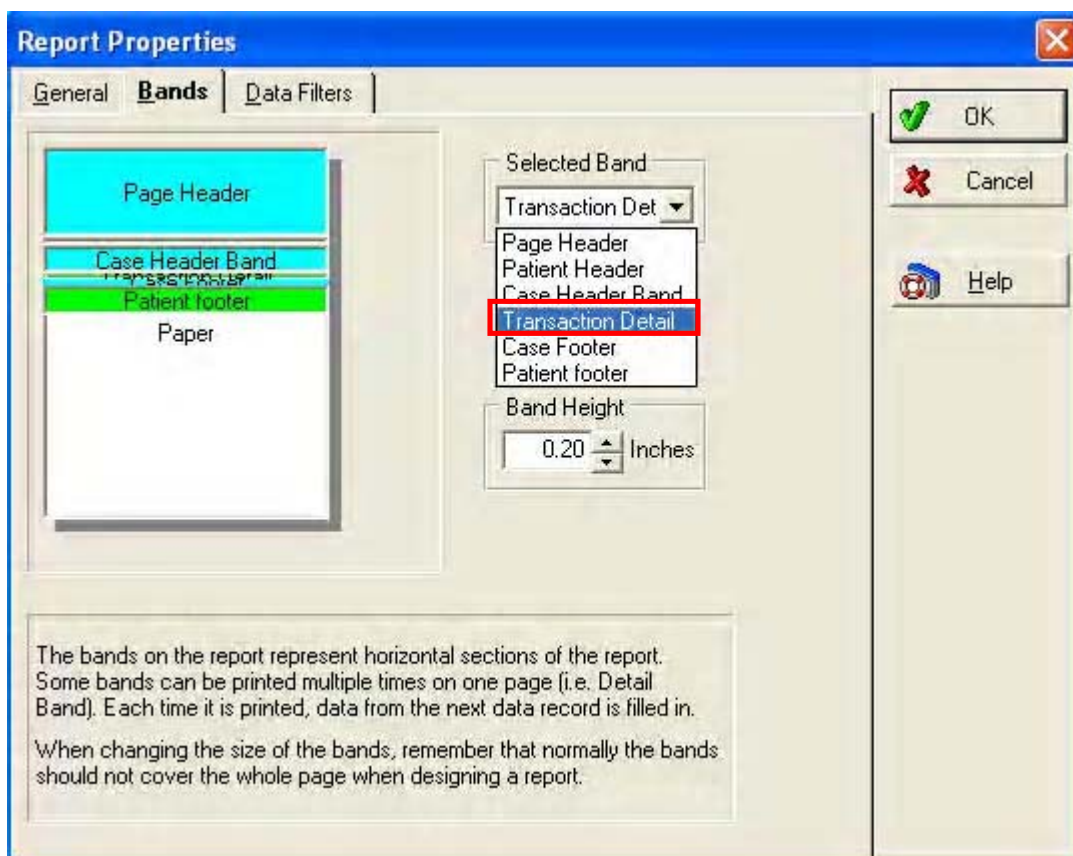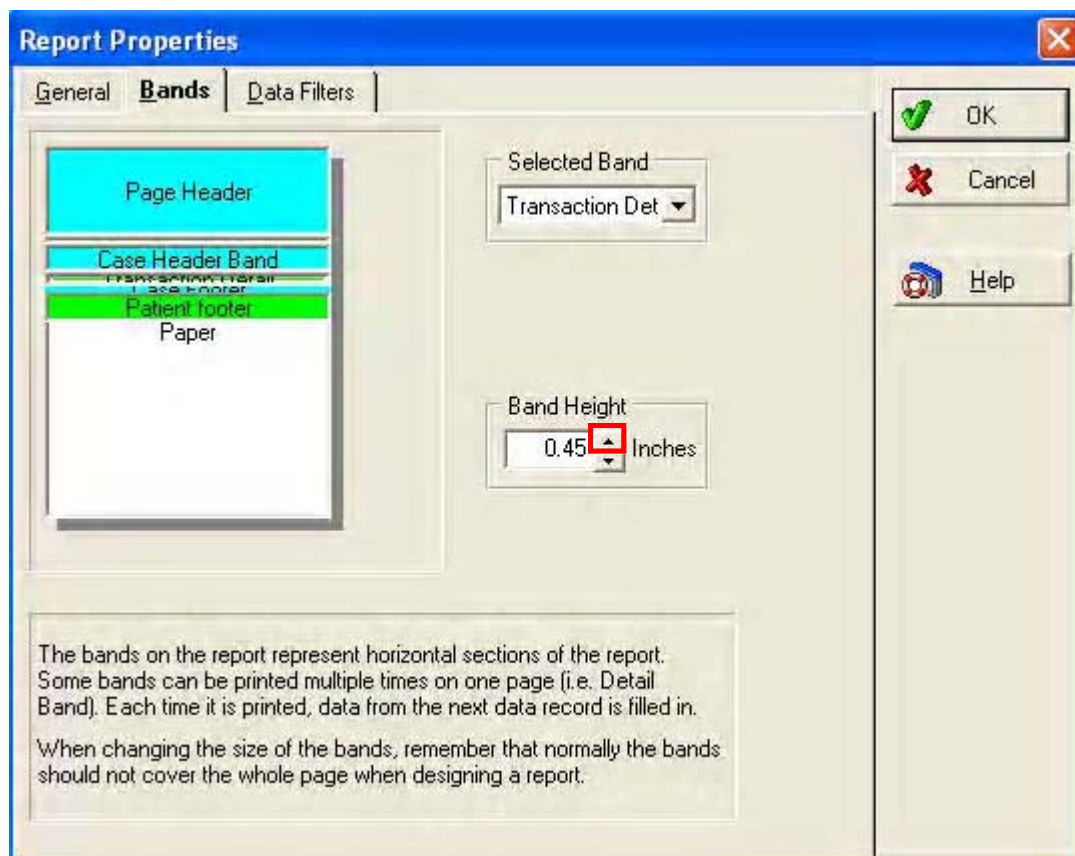
4. Click on the File menu and Report Properties.
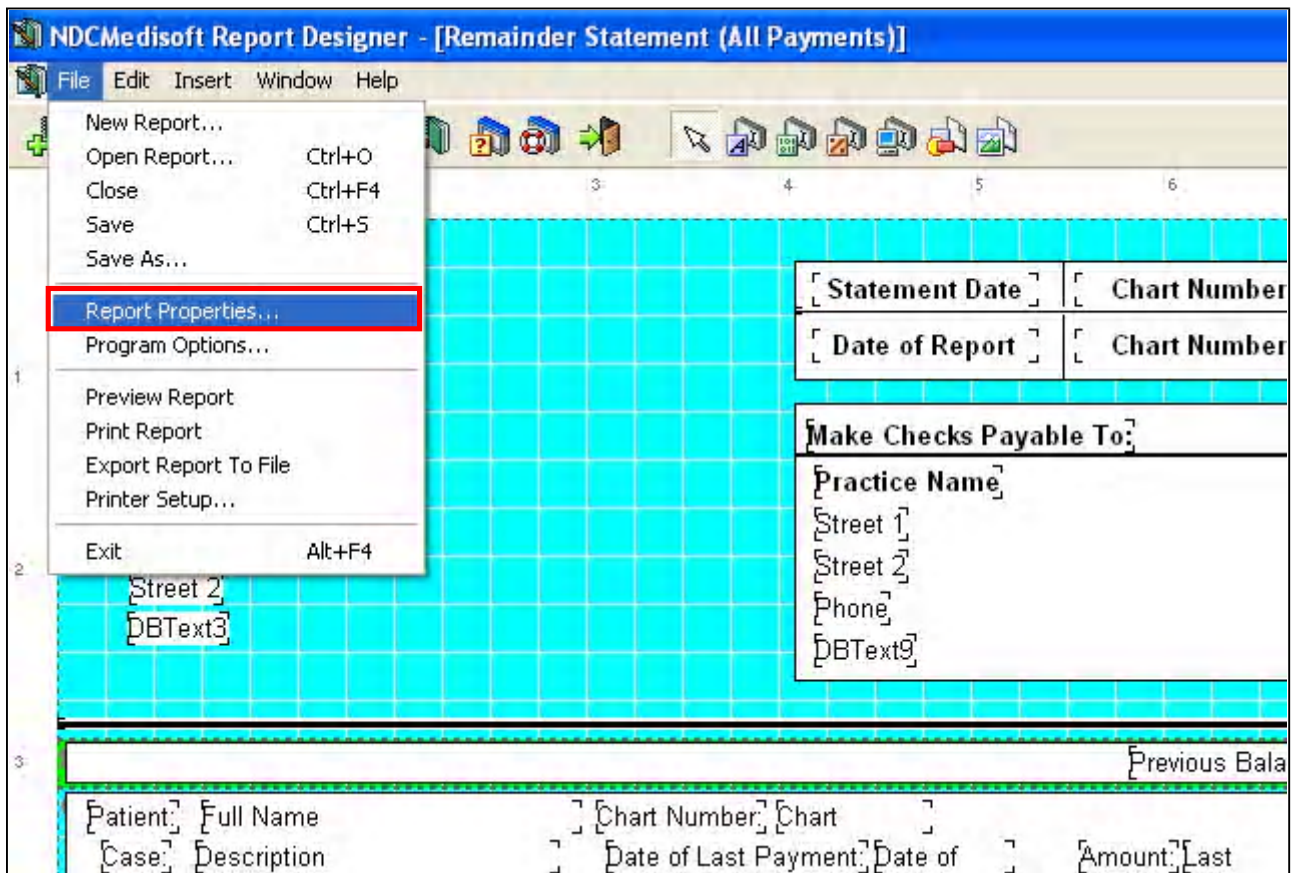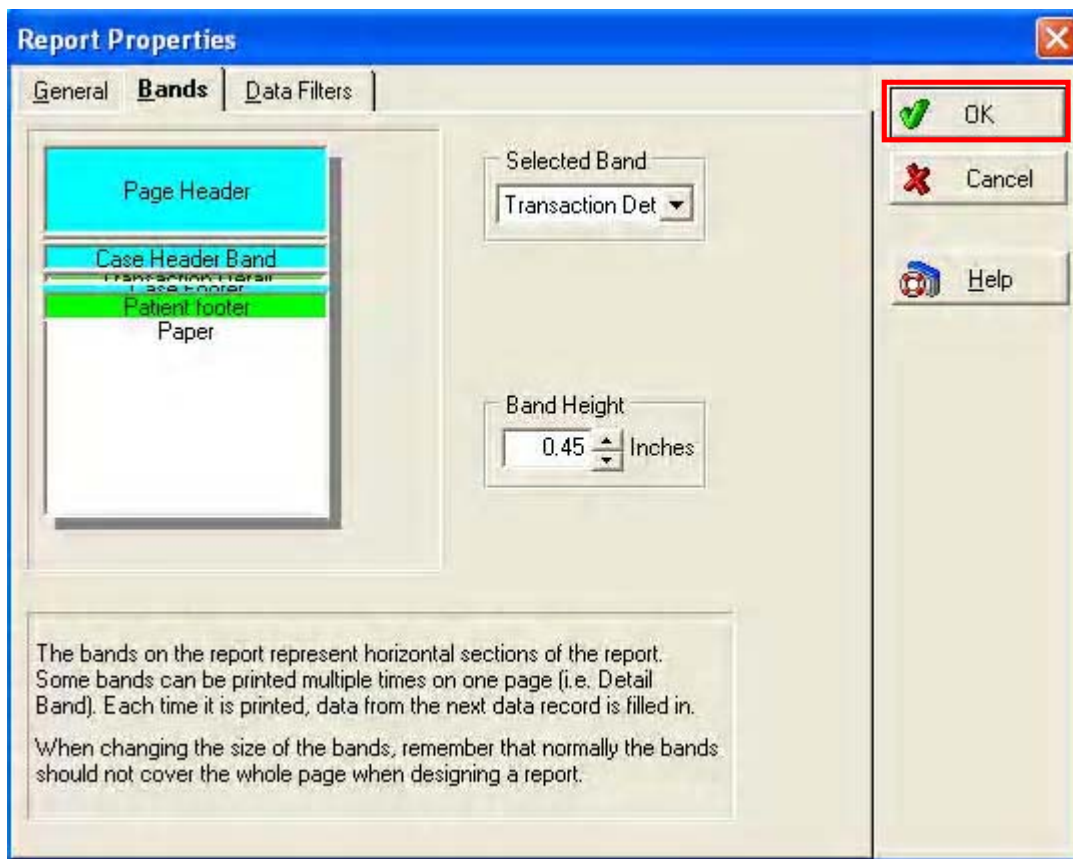

5. Click on the Bands tab.
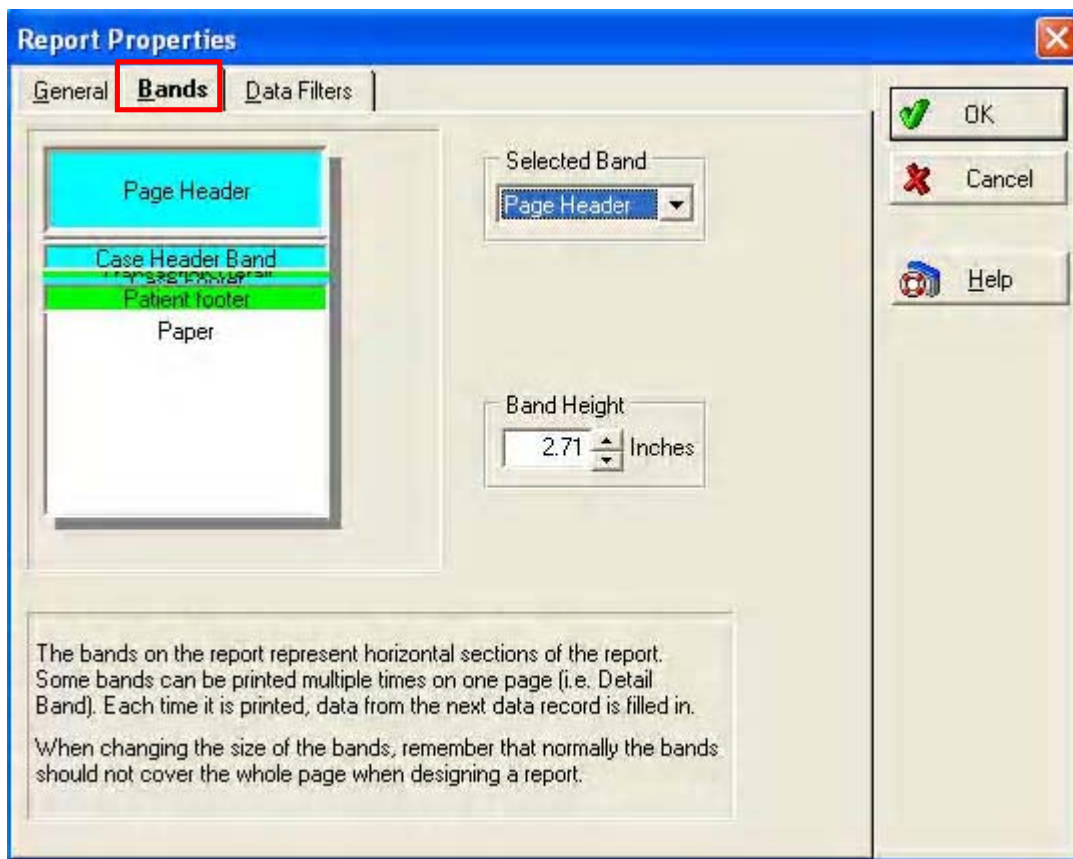
6. In the field labeled Selected Band, select the Transaction Detail Band.

7. Click on the up arrow next to the field labeled Band Height. This will increase the number listed in that field.

8. Click on OK.

Report Properties

General | **Bands** | Data Filters

Page Header

Case Header Band
~~Transaction Detail~~
~~Case Footer~~
Patient footer
Paper

Selected Band
Transaction Det ▼

Band Height
0.45 ▲▼ Inches

OK

Cancel

Help

The bands on the report represent horizontal sections of the report. Some bands can be printed multiple times on one page (i.e. Detail Band). Each time it is printed, data from the next data record is filled in.

When changing the size of the bands, remember that normally the bands should not cover the whole page when designing a report.

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
Street 2
City Line
Phone

Full Name
Street 1
Street 2
DBText3

| Statement Date | | Chart Number |
| Date of Report | | Chart Number |

Make Checks Payable To:
Practice Name
Street 1
Street 2
Phone
DBText9

Previous Balance

Patient: Full Name   Chart Number: Chart
Case: Description   Date of Last Payment: Date of   Amount: Last

DBText14   DBText10   DBText11   Paid By
Dates   Procedure   Charge   DBText13   DBText4   DBText6   Guarantor   Adjustment

Date From   Procedure   Amount   Insurance   Insurance 2   Insurance   DBText2   Adjustmen

DBText12

Patient footer

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10. Click on the Insert Data Field icon in the toolbar at the top of the screen.
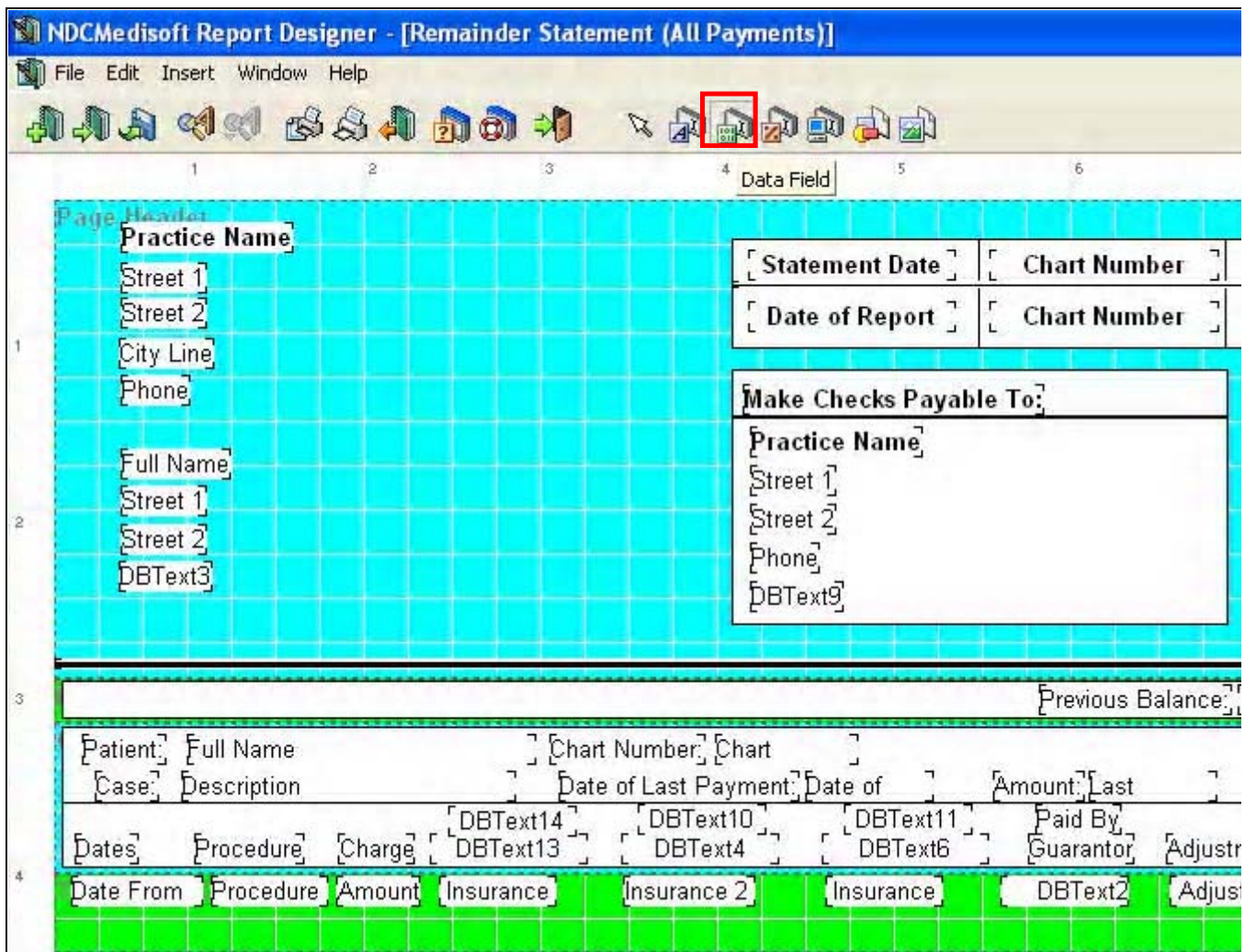
11. After clicking on the Insert Data Field icon, click in the Transaction Detail band. You will see a new data field appear.

Practice Name
Street 1
Street 2
City Line
Phone

Full Name
Street 1
Street 2
DBText3

Statement Date | Chart Number
Date of Report | Chart Number

Make Checks Payable To:
Practice Name
Street 1
Street 2
Phone
DBText9

Previous Balance:

Patient: Full Name   Chart Number: Chart
Case: Description   Date of Last Payment: Date of   Amount: Last
                                                                             Paid By
Dates   Procedure   Charge   DBText14   DBText10   DBText11   Guarantor   Adjustment
                              DBText13   DBText4   DBText6

Date From   Procedure   Amount   Insurance   Insurance 2   Insurance   DBText2   Adjustme
DBText7
DBText12

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12. Double-click on the new data field. You can also right click on the field and click on Properties.
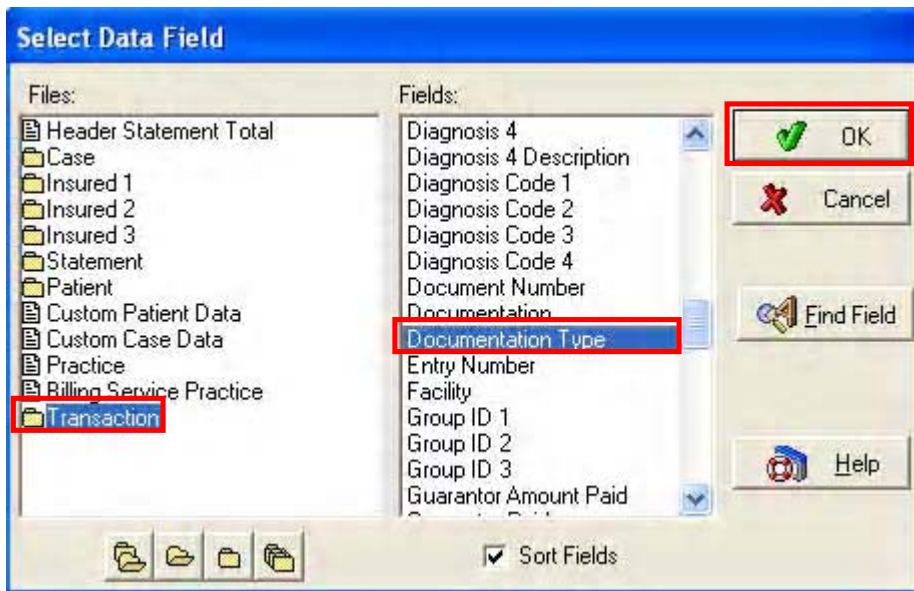
13. Click on New Expression.
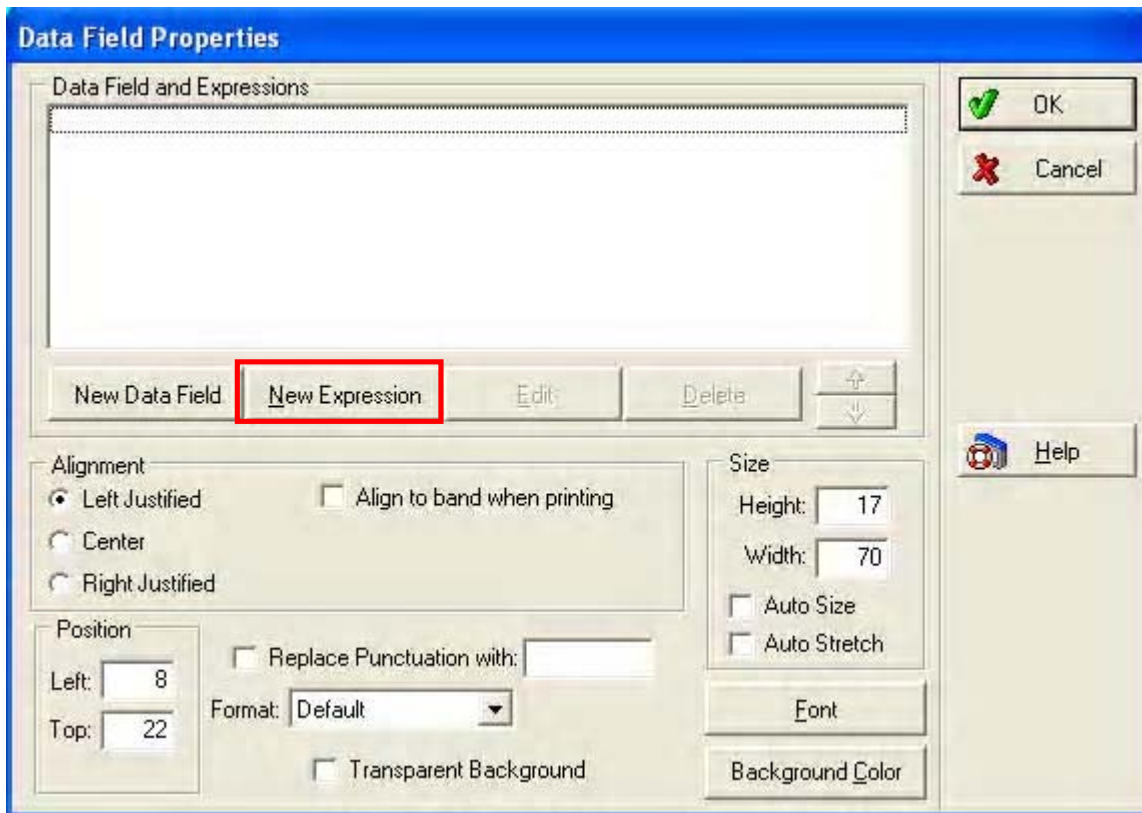
14. Click on the Data button in the section of the screen labeled If.
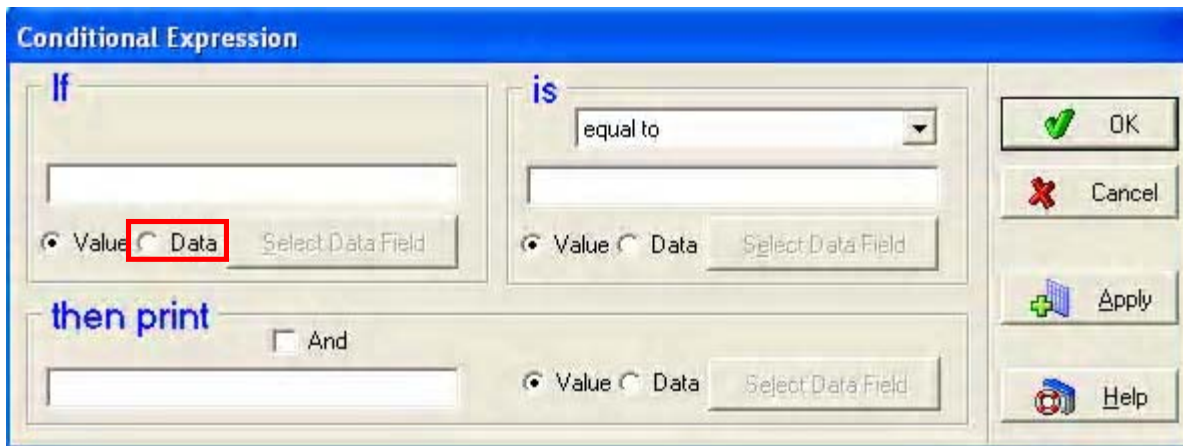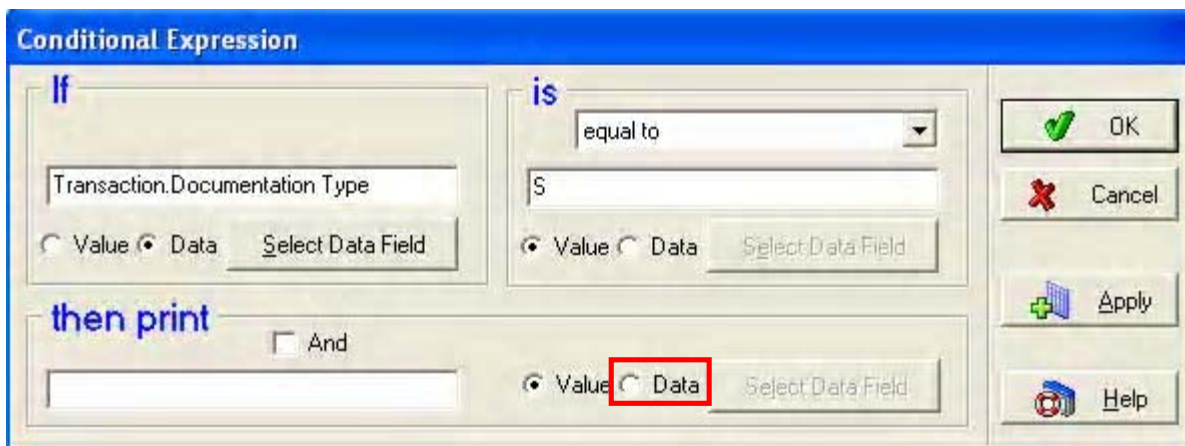

15. In the Files column, highlight the Transaction File. In the Fields Column, highlight the Documentation Type field. Click on OK.

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.
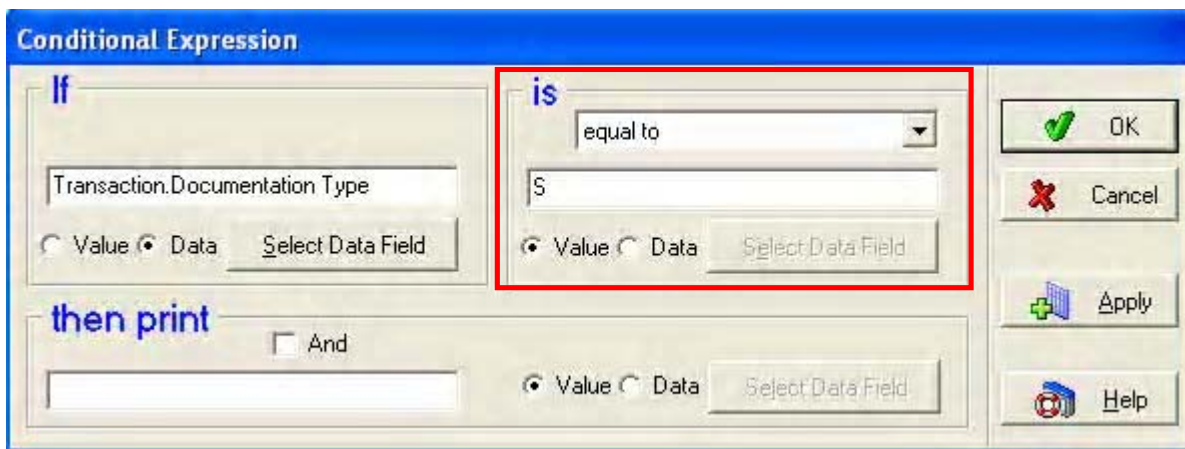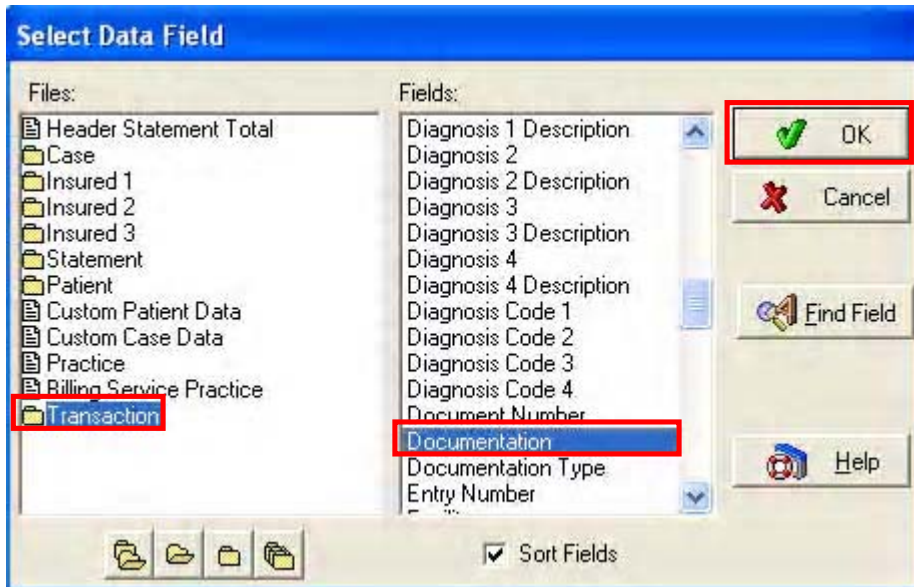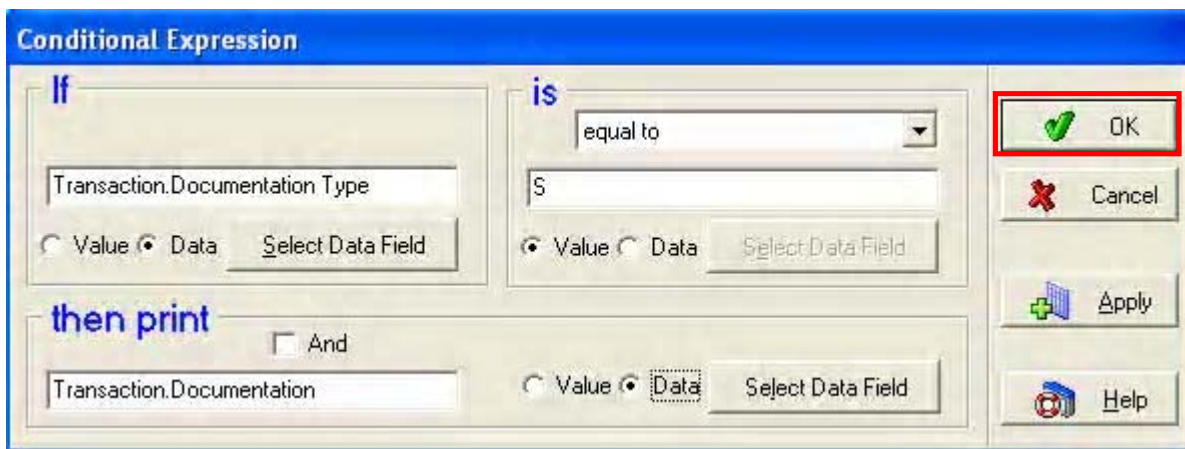

17. Click on the Data field in the portion of the screen labeled then print.

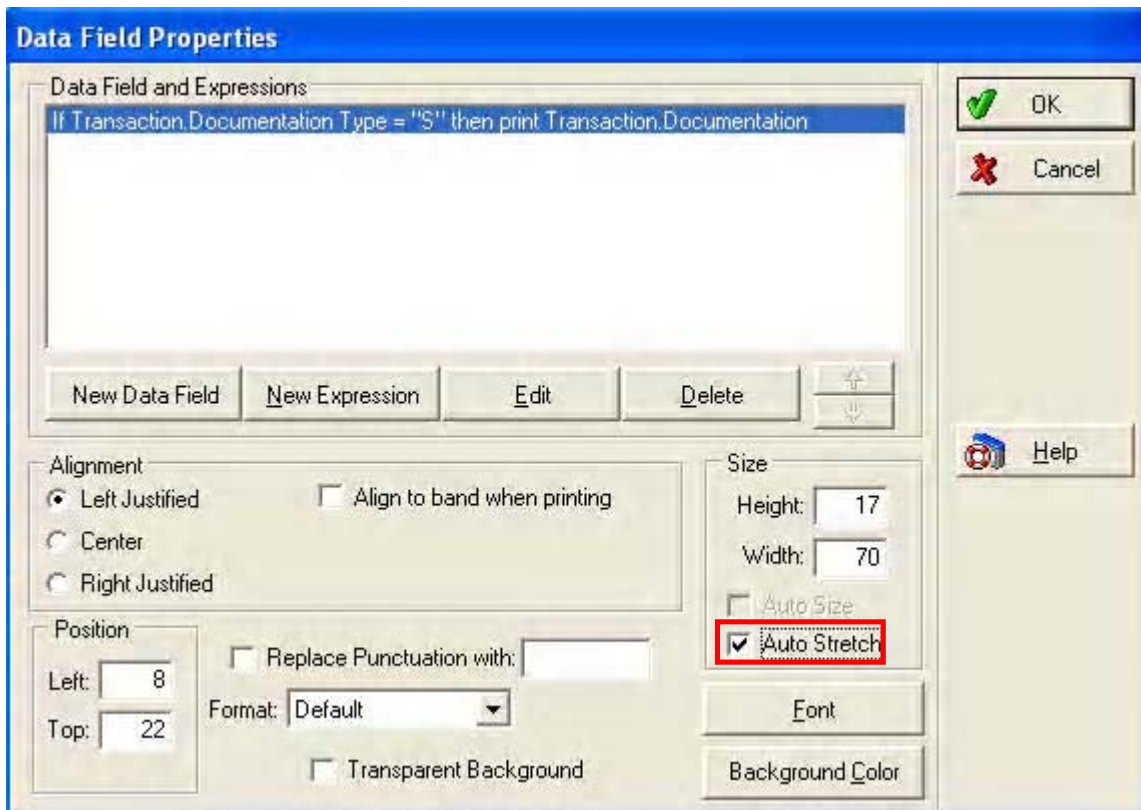18. In the Files column, select Transaction. In the Fields column, select Documentation. Click
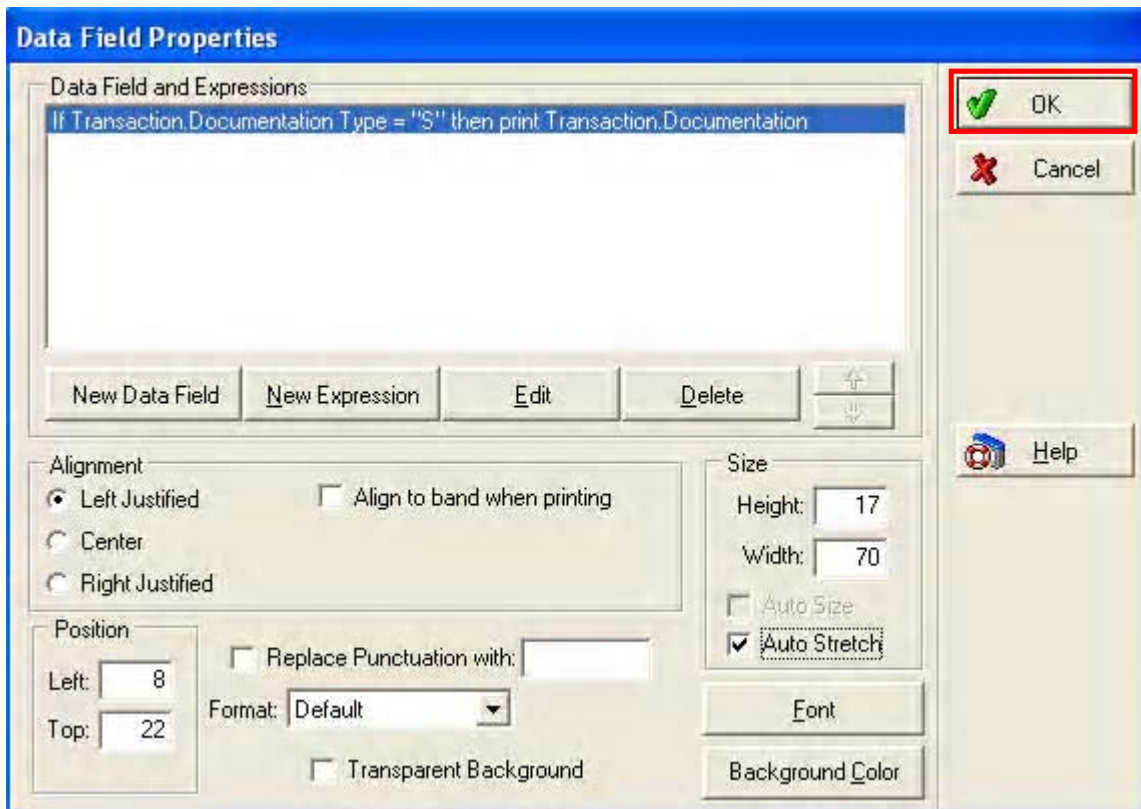
on OK.

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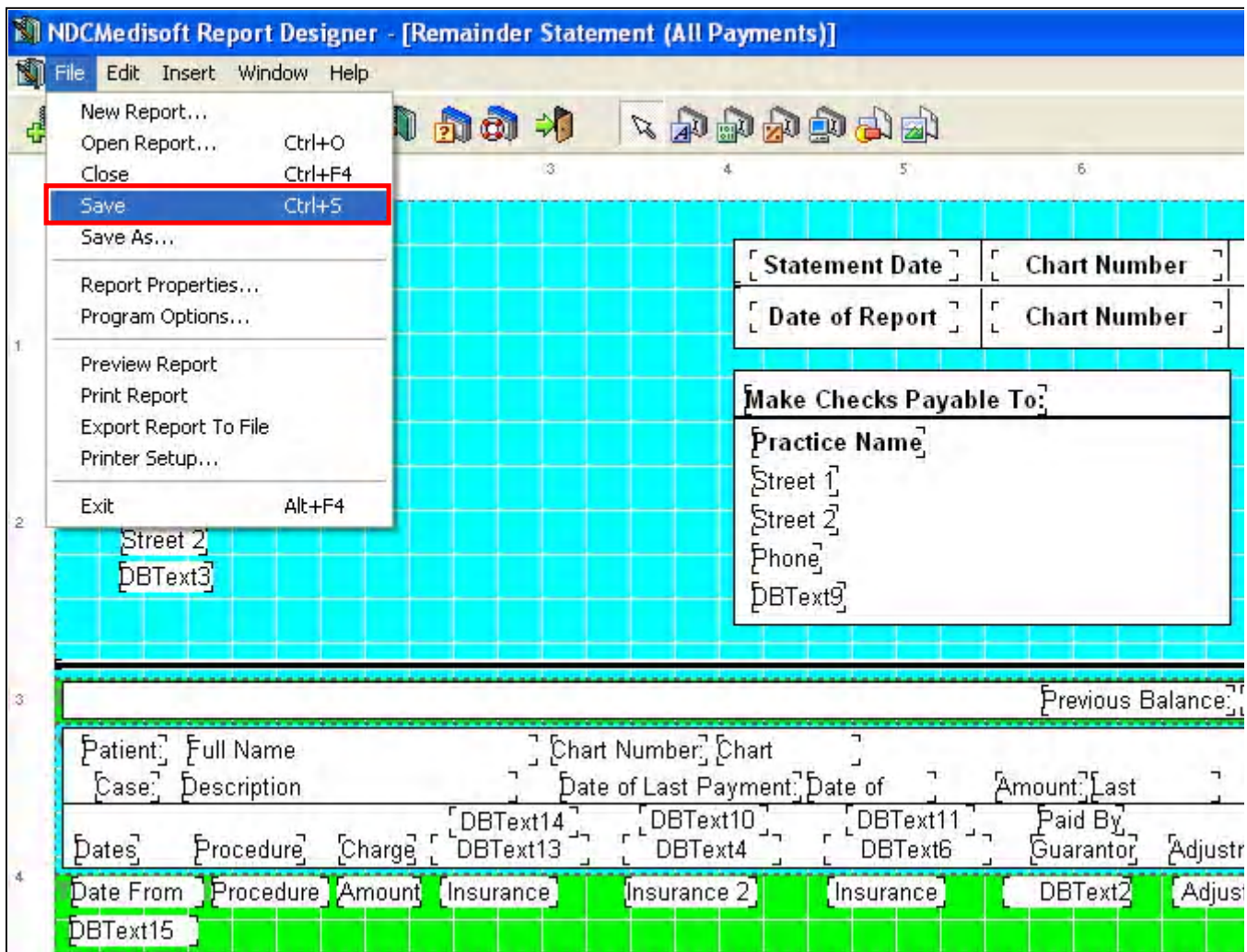

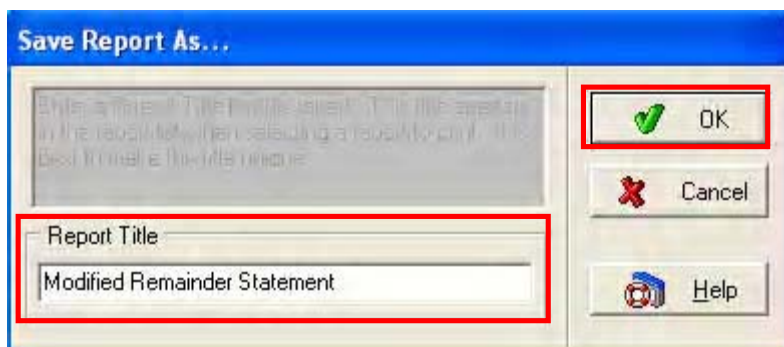20. Place a check mark next to the field labeled Auto Stretch.

21. Click on OK.

22. Click on the File menu and Save.

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.
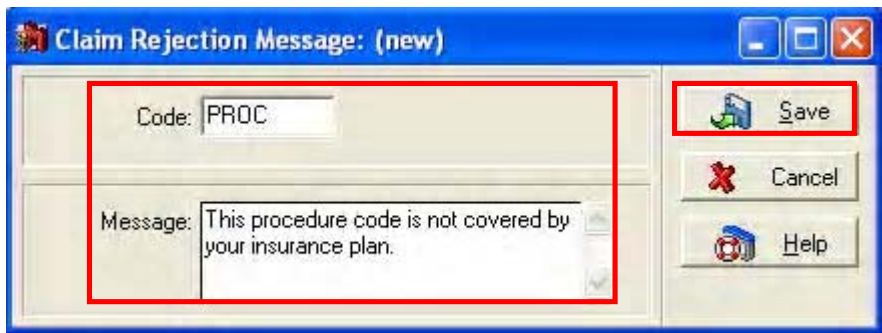

24. You will now need to set up the Claim Rejection Messages. Click on the Lists menu and Claim Rejection Messages.
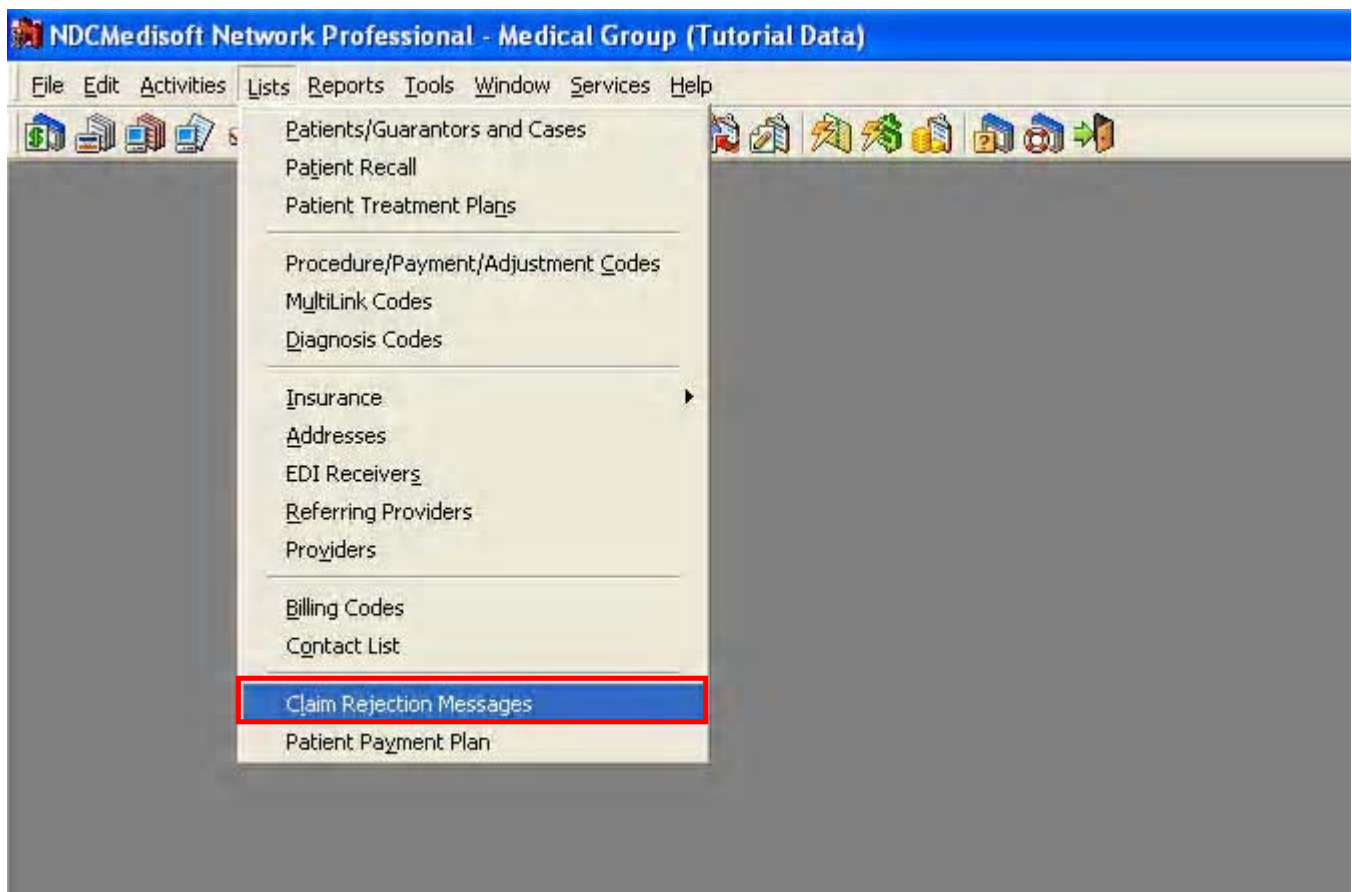
25. Click on New.
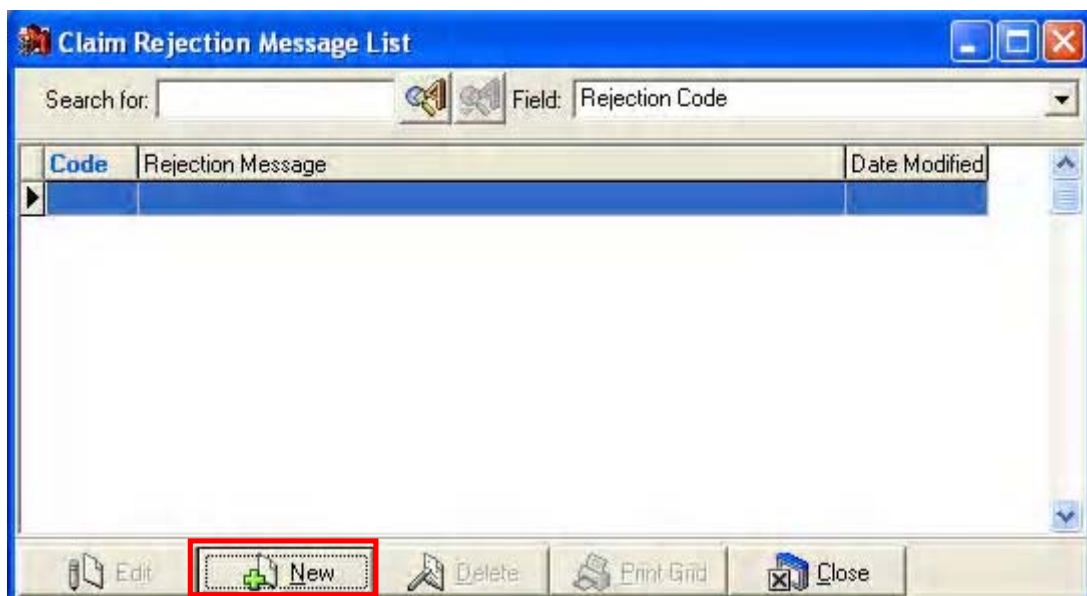
26. In the Code field, enter a code to identify this rejection message. In the Message field, enter the Claim Rejection Message you wish to appear on a statement.

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.