BATCH DOCUMENTS
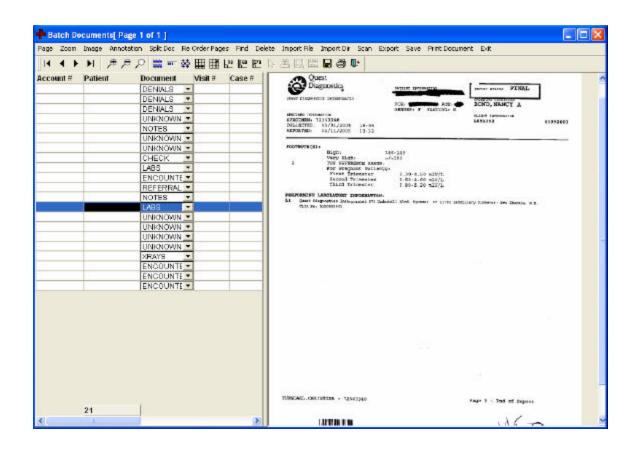
Batch Documents is an area where users can find documents related to the following:
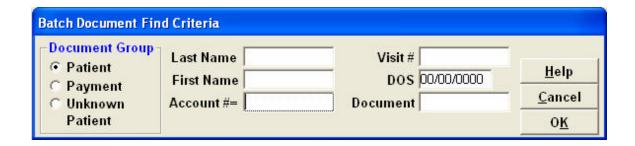1. Patient
2. Payment
3. Unknown Patient

Following is the explanation of different Find Criteria which can be used to find documents in Batch Documents. User can find documents by clicking Find on the top menu bar.
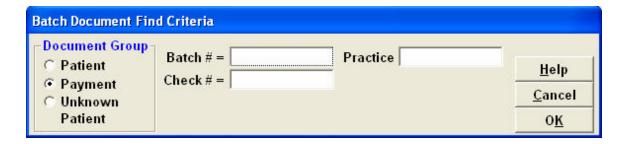
Patient:
1. Last Name
2. First Name
3. Account Number
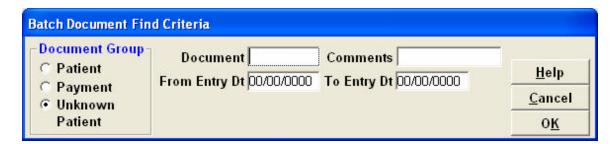4. Visit Number
5. Date of Service
6. Document Type

Batch Document Find Criteria

Document Group
- ● Patient
- ○ Payment
- ○ Unknown Patient

Last Name [ ] Visit # [ ]
First Name [ ] DOS [00/00/0000]
Account #= [ ] Document [ ]

Help
Cancel
OK

Payment:
1. Batch Number
2. Check Number
3. Practice

Batch Document Find Criteria

Document Group
- ○ Patient
- ● Payment
- ○ Unknown Patient

Batch # = [ ] Practice [ ]
Check # = [ ]

Help
Cancel
OK

Unknown Patient:
1. Document Type
2. From Entry Date
3. To Entry Date
4. Comments

Batch Document Find Criteria

Document Group
- ○ Patient
- ○ Payment
- ● Unknown Patient

Document [ ] Comments [ ]
From Entry Dt [00/00/0000] To Entry Dt [00/00/0000]

Help
Cancel
OK

Following is a list of shortcut keys available on Find Criteria window:

Control Name	Shortcut Key
Help	Alt + H
Cancel	Alt + C
OK	Alt + K

Control Name	Description
Patient	
Last Name	Last name of the patient
First Name	First Name of the patient
Account Number	Patient's account number
Visit Number	Patient's visit number
Date of Service	Date when the services were rendered to the patient
Document Type	Lets a user know the document type of a particular document. Document types are created and configured in Security application.
Payment	
Batch Number	Payment batch number in which the document was scanned.
Check Number	Check number assigned to the document at the time of applying payment.
Practice	Name of the practice the document to be found is in.
Unknown Patient	
Document Type	This is the type of document the document was scanned or imported as.
From Entry Date	User can select the start of date range of the document to be found which was scanned/imported.
To Entry Date	End of date range.
Comments	A scanned or imported document can be found if comments were entered against a particular document.

Following are the column descriptions for the found documents:

Control Name	Description
Account #	Patient account number this document belongs to.
Patient	Last name, First Name of the patient.

Document	This is the type of document which was selected at the time of scanning or import. This also can be the type of document specified by barcode present on the scanned or imported document.
Visit #	This is the visit number of the patient.
Case #	Anesthesia case number.
DOS	Date of service of the patient.
Attach	This checkbox tells SequelMed whether to print this document at the time of claim printing or not.
Entry Date	
Comments	Comments against a particular document can be entered here.
Practice	This is the name of the practice patient is registered with.