

Managing Providers: Walk-Ins and Did Not Assign

Managing providers (doctors) in OD Professional is necessary for several reasons; proper claims processing, productivity and collection records and identifying customers (patients) and their providers. OD Professional allows you to list all of the providers working in your office and gives you the option of assigning one provider as the “default” provider.

The default provider is the provider assigned as the responsible provider for all new customers. For a one provider office this isn’t a problem, but for a multi-provider office, it can be a little more confusing. If the responsible provider isn’t properly assigned for each customer, it can create problems with claims processing and provider compensation. This is especially the case if the provider’s compensation is based on production / collection.

To handle and avoid situations like this, you should follow the procedures listed below.

Walk-Ins:

Situation: *A customer walks in the store and purchases a pair of glasses, a few boxes of contact lenses and accessories; eyeglass cases and a bottle of solution. This customer never saw a provider in your office, because they brought in an Rx obtained from an outside provider. Since you need to enter this customer into OD Professional to record the sale, **which provider in your office should be assigned as the responsible provider?***

Solution: For this situation, add a provider named “Walk-In” in the provider list. This allows the front desk staff to assign the “walk-in” provider to this customer, preventing any existing provider to benefit from the sale and collection. This also provides a breakout for management on the total of walk-in sales.

<input checked="" type="checkbox"/>	<input type="checkbox"/>	00011	Manhattan	Walk In	Walk In	Walk In
<input checked="" type="checkbox"/>	<input type="checkbox"/>	00012	Manhattan	CLPU	CLPU	CLPU
<input type="checkbox"/>	<input type="checkbox"/>	00013	Manhattan	Did Not Assign		

Did Not Assign:

Situation: *A new customer calls your office and so a new customer record is created in OD Professional, which is also assigned to the default provider. But, the front desk staff schedules this new customer with another doctor and no one discovers the wrong provider assigned to this customer. The customer completes their visit and their services and/or purchases are billed and recorded under the wrong provider. How can we prevent new customers from being assigned to the wrong provider?*

Solution: For this situation, add a provider named “Did Not Assign” in the providers list and make it the “default” provider for all new customers. If the front desk staff does not assign a responsible provider to this new customer, it will affect claims processing and any sales or production reports created will include the provider “Did Not Assign” alerting the staff that a provider was not properly assigned to the new customer. The staff should then go back to these customers and assign the correct provider.

<input checked="" type="checkbox"/>	<input type="checkbox"/>	00011	Manhattan	Walk In	Walk In	Walk In
<input checked="" type="checkbox"/>	<input type="checkbox"/>	00012	Manhattan	CLPU	CLPU	CLPU
<input type="checkbox"/>	<input type="checkbox"/>	00013	Manhattan	Did Not Assign		

Remember to review the job aid on changing providers on posted invoices. Also, please refer to the **Assigning Responsible Providers** job aid for more information.