



Advanced Billing Consultants, Inc.

New Client Workbook

New Client Worksheet & Technical Information Worksheet





Please include the following with this workbook:

- Welcome to Medicare letter or a Medicare EOB
 - Fee Schedule or Superbill
- Cash Pay Patient Fee Schedule
 - Copy of W-9
 - Voided Check





New Client Worksheet

****Please fill out this form completely and email it to forms@advancedbillingconsultants.com or fax to 949.713.2931****

Client/Practice Name:

Specialty:

Office Address 1:

Office Address 2:

Office Address 3:

Office Phone #:

Office Fax #:

Office Manager Name:

Office Manager Email:

Pay-to Address:

Credit Cards Accepted: Visa MasterCard Amex Discover

Advanced Billing Consultants, Inc. | 30021 Tomas, Suite 250 | Rancho Santa Margarita, CA 92688
Telephone: 949.713.3998 | Toll-Free: 888.222.2125 | Fax: 949.713.2931
<http://www.advancedbillingconsultants.com>



Lockbox

If you have a lockbox, please fill in this section.

<u>Payer's Name</u>	<u>Payer's Lockbox</u> <u>Website URL</u>	<u>Username</u>	<u>Password</u>

EDI Clearing House

<u>EDI Clearing House</u>	<u>EDI Clearing House</u> <u>Website URL</u>	<u>Username</u>	<u>Password</u>

E-Statement Vendor

<u>E-Statement Company</u>	<u>E-Statement Website URL</u>	<u>Username</u>	<u>Password</u>



Virtual Terminal (Payment Processing)

<u>Company</u>	<u>Company Website URL</u>	<u>Username</u>	<u>Password</u>

ERA\EFT Payers

Please list the payers you receive ERA's and/or Eft's for, and where the ERA\EFT are delivered (i.e. Clearinghouse) if applicable.

<u>Payer</u>	<u>EFT? (Y\N)</u>	<u>ERA? (Y\N)</u>	<u>Delivered to...</u>



Client Procedures

****Please answer the following questions as it pertains to your office****

1. What is the minimum balance you would like to send patient's a statement for?
2. Do you actively refund patients?
3. Do you have any capitated contracts?

If yes, please provide a copy of contract

****Please list all the IPA Names with capitated contracts****

4. Do you have a CLIA?
5. Do you bill secondary insurances as a courtesy?
6. Do you charge for no shows or same day cancellations?



- a. What is the fee?
- 7. What is your returned check fee?
- 8. Who at your office will approve patient accounts to be sent to collections?
- 9. Do you have a collection agency you would like to continue using?
- 10. Do you sell products, vitamins, supplements, or supplies?
 - a. Will ABC be responsible for posting those charges and payments?

Hospital Affiliations

Please list the names of all hospitals and surgery centers your provider(s) are affiliated with

<u>Provider Name</u>	<u>Hospital Name</u>



Technical Information Worksheet

****Please fill out this form completely and email it to forms@advancedbillingconsultants.com or fax to 949.713.2931****

Client/Practice Name:

Technical Contact Name:

Technical Contact Phone #:

Technical Contact Email:

Will you be accessing ABC's billing software?

EMR \ Practice Management Software

****Please list all EMR or Practice Management software we will need access to****

<u>Software</u>	<u>Version</u>

****Please add the following usernames and passwords to all software we will need access to. If licensing is an issue, please contact Cindi****

<u>Username</u>	<u>Password</u>
cgraham	@dvanc3d1
jchappell	@dvanc3d1
bscott	@dvanc3d1
sjones	@dvanc3d1
pbilling	@dvanc3d1
asmith	@dvanc3d1
tjuneman	@dvanc3d1
mmorris	@dvanc3d1
kperro	@dvanc3d1
sjohnson	@dvanc3d1



Remote Desktop Configuration

****ABC does not support clients with VPN connections only****

Remote Desktop WAN IP:

Remote Desktop LAN IP:

Remote Desktop Port:

<u>Remote Desktop Username</u>	<u>Remote Desktop Password</u>
cgraham	@dvanc3d1
jchappell	@dvanc3d1
bscott	@dvanc3d1
sjones	@dvanc3d1
pbilling	@dvanc3d1
asmith	@dvanc3d1
tjuneman	@dvanc3d1
mmorris	@dvanc3d1
kperro	@dvanc3d1
sjohnson	@dvanc3d1

Sending Files to ABC

All files sent to ABC (EOB, Charges, Demographics, EPHI) must be sent through our SFTP server. If you will need to send us files (not uploaded to EMR), please contact Brad ASAP, so that he may set up the SFTP at your site remotely.

****If you have any question about this information, please do not hesitate to call Brad at 949.713.3998 EXT: 115, or email brad@advancedbillingconsultants.com****