

CarePaths Cheat Sheet

Add Insurance Payer

Home

Claims

Payers

Add Payer

Choose

Save

Add a Document

Admin

Clinical

Documents

Add document

Browse and choose

Add document

Change document associated with appt type

Home

Appointment types

Change Fees

Admin

Accounting

Billing Codes

New

Add New Client:

Home

Membership

Add new patient

(complete form and) Save

Contacts (fill out)

Save

Relationship

Care Manager

Choose yourself

Add Coverage to Client

Client's name

Claims

Coverage wizard

Add new coverage/payer

Choose

(Coverage type= Commercial)

Signature source (individualize)

Save