



Synergistic Office Solutions, Inc.

ICD-10 Prep Utility

Overview

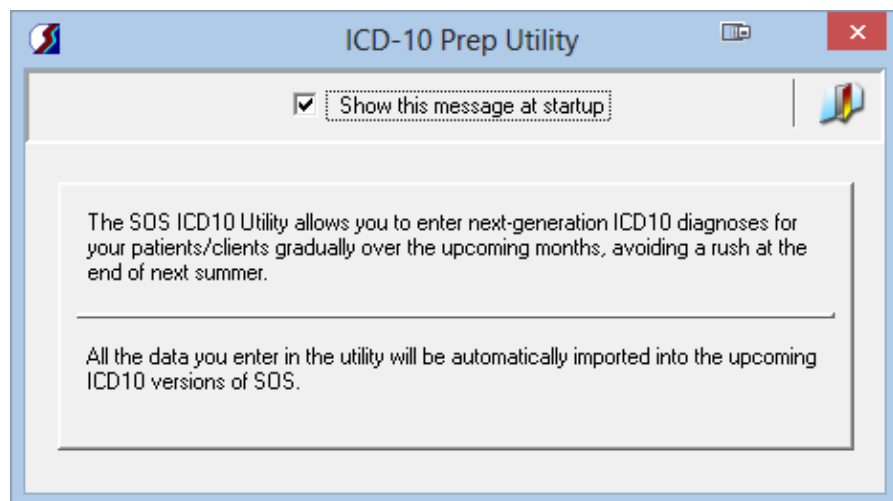
The SOS ICD-10 Prep Utility is provided to SOS customers to assist them to prepare for the transition from ICD-9 and DSM diagnostic codes to the ICD-10 codes that will be required by most Insurance Carriers starting October 1, 2014.

Specifically, the utility will help you select an appropriate ICD-10 code for each of your current codes. It presents the codes currently stored for each patient in SOS and provides fields in which you are able to specify the new code that you want to be used on your claims after the cutover date in 2014. Whenever there is a one-to-one match between your old code and a new code, the utility will default the matching ICD-10 code for you. When there is more than one possible match, it will show you a list of those candidates so that you can select the best one from the group. Matching criteria are those provided by CMS in their General Equivalency Matching (GEM) tables. Finally, if it should be necessary, you can search and select a different code from the entire body of almost 100,000 ICD-10 diagnostic codes.

When you save your choices, they are stored in the SOS database, and when you install an ICD-10 compatible version of SOS, your selected ICD-10 codes for each patient will automatically appear in the records of each patient, ready for insertion in claims for services rendered after the mandatory change-over date.

How to Start the ICD-10 Prep Utility

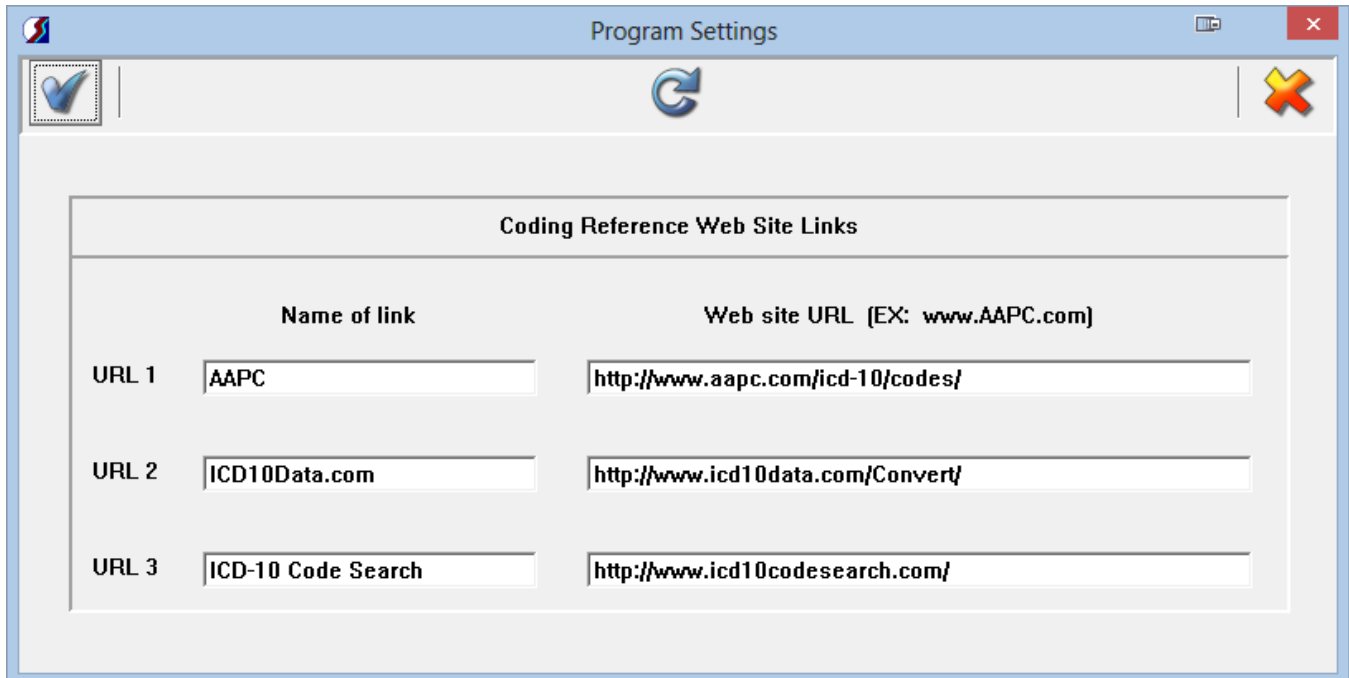
In SOS Office Manager Release 2013.02 or later, go to **Tools > ICD-10 Prep Utility**. The utility will launch in a separate window and will display an information window.



Uncheck the box at the top and close the window. A window will appear listing the datasets found in your database. For most, dataset 101 is the main dataset. In any case, the datasets will be listed with both number and licensee name, so select the one in which you want to work.

Coding Assistance Setup

As you try to determine the correct ICD-10 codes, you may find it helpful to refer to one or more internet sites. The coding screens provide for three internet links. We have pre-set the links to three popular sites, but you can easily reset them to three of your own choosing by going to **File > Settings** from the main menu:



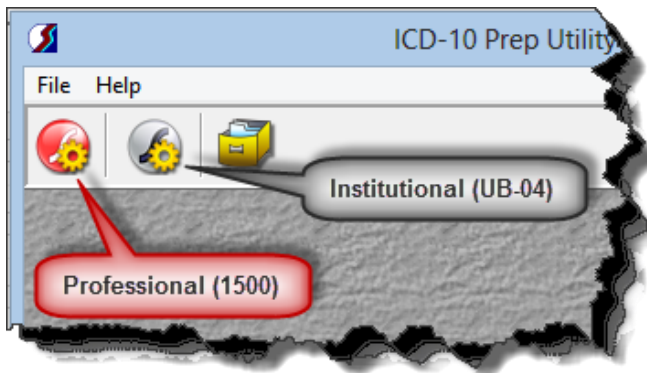
The screenshot shows the 'Program Settings' window with the 'Coding Reference Web Site Links' section. The window has a title bar with a checkmark icon, a refresh icon, and a close button. The section contains a table with three rows for URL 1, URL 2, and URL 3. Each row has two columns: 'Name of link' and 'Web site URL [EX: www.AAPC.com]'. The first row is pre-filled with 'AAPC' and 'http://www.aapc.com/icd-10/codes/'. The second row is pre-filled with 'ICD10Data.com' and 'http://www.icd10data.com/Convert/'. The third row is pre-filled with 'ICD-10 Code Search' and 'http://www.icd10codesearch.com/'.

	Name of link	Web site URL [EX: www.AAPC.com]
URL 1	AAPC	http://www.aapc.com/icd-10/codes/
URL 2	ICD10Data.com	http://www.icd10data.com/Convert/
URL 3	ICD-10 Code Search	http://www.icd10codesearch.com/

If you change to different sites and subsequently want to return to the defaults, just click the circle-arrow icon in the toolbar at the top of this window.

Working with the Patient-Claim Setup List Window

To start working with your data, click the appropriate Claim Setup icon in the main tool bar. Diagnosis codes in SOS Office Manager are, as you know, saved in the Claim Setup window. That is true for both professional claim (CMS-1500) setups and institutional claim (UB-04) setups. Note that only Pro version licensees will see both claim setup icons in the toolbar.



A list window will open. Lite and Standard versions of SOS have just one claim setup per patient, so if you have one of those versions, your list will have only one row in the list for each patient. In the example below, we show how the window looks in a Pro version, with an unlimited number of claim setups for each patient. There will be one row for each claim setup, which is why you see some duplication in the example below.

SOS ICD-10 Prep Utility

☐ Show inactive patients Show only patients with this ICD-9 Dx code

☐ Hide patients with "Completed" status Show only patients with this Primary Provider

By Name | By ID |

Find Name

Pt Name	ID	Status	Prv	CSU	ICD-9 Dx Codes	ICD-10 Dx Codes
Adler, Frank R	2143658709	To Do	PPP	CMS DEFAULT CLAIM S	296.21	
Adler, Frank R	2143658709	To Do	PPP	Second CSU	290.0	
Adler, Frank R	987654321	To Do	NS1	ENTER A CMS DESCR		
Akers, Adam W	AKERS1	To Do	PPP	CMS DEFAULT CLAIM S	296.22	
Anderson, Erica M	ERIAND0000	To Do	PPP	CMS DEFAULT CLAIM S	309.3	
Anthony, Monika O	MONANT000	To Do	AT	CMS DEFAULT CLAIM S	300.4	
Anthony, Monika O	MONANT000	To Do	AT	Second CSU		
Ausman, Marylou C	2005 545	To Do	006	CMS DEFAULT CLAIM S	296.23	
Austin, Annmarie Y	ANNAUS0000	To Do	NS	CMS DEFAULT CLAIM S	309.0	
Avila, Charles P	CHAAV10000	To Do	PPP	CMS DEFAULT CLAIM S	296.24 295.30	
Ballew, Karrie R	KARBAL0000	To Do	PPP	CMS DEFAULT CLAIM S	300.4	

This window is basically your To-Do list. The available filters are pretty self-explanatory. You can use any combination of the four filters, with the exception of "Hide patients with "Completed" status. When you have finished matching and selecting ICD-10 codes for a row, you can set that row to "Completed" and then use the filter on the list window to hide that row in the list. Theoretically, you would keep working until the list is empty when that filter option is checked.

Record Will Be Added

Frank R Adler ID: 2143658709 DOB: 07/06/1934

CMS Claim Setup: CMS DEFAULT CLAIM SETUP

☐ Coding Complete

ICD-9

Dx 1 296.21 Dx 2 Dx 3 Dx 4

ICD-10

Dx 1 F32.0 Dx 2 Dx 3 Dx 4

Setting New Diagnosis Codes

Select a row from the list window. Depending on whether you are working on Professional or Institutional claim setups you will see the appropriate form. The Institutional form has more diagnosis fields, but they function in exactly the same way as described here for the Professional claim setups.

Below is a screenshot of the Professional form of primary interest to most SOS customers. You will notice that while you have fields for only four diagnoses in your Professional Claim Setup screen now, consistent with paper claims through the 08-05 1500 form, the new paper form and the 837 electronic claim format both support up to 12 diagnoses. SOS therefore provides you with the full complement of 12 fields in the Prep Utility and in the future ICD-10 versions of SOS. There is no change in the number of Dx code fields on the Institutional claim setup form, so for every ICD-9 field there is a matching ICD-10 field.

The only other features on the form are the “Complete” checkbox at the top, and the links to coding assistance web sites at the bottom. Below are screenshots for the Professional and Institutional Dx entry forms in the Prep Utility:

Record Will Be Added

Frank R Adler ID: 2143658709 DOB: 07/06/1934

CMS Claim Setup: CMS DEFAULT CLAIM SETUP

☐ Coding Complete

ICD-9
Dx 1 296.21 Dx 2 Dx 3 Dx 4

ICD-10
Dx 1 F32.0 Dx 2 Dx 3 Dx 4

ADDITIONAL ICD-10
Dx Code Dx Code Dx Code Dx Code
Dx Code Dx Code Dx Code Dx Code

CODING ASSISTANCE
[AAPC](#) [ICD10Data.com](#) [ICD-10 Code Search](#)

Professional

Record Will Be Added - You MUST Save This Record To Make These Changes/Additions Permanent

Janell C Close ID: JANCLO00000087 DOB: 09/03/1948

UB Claim Setup: UB CSU

☐ Coding Complete

ICD-9 (from Office Manager)
Box 67 A B C D E F G H
I J K L M N O P Q
Box 69 Box 70 A B C Box 72 A B C

ICD-10
Box 67 A B C D E F G H
I J K L M N O P Q
Box 69 Box 70 A B C Box 72 A B C

CODING ASSISTANCE
[AAPC](#) [ICD10Data.com](#) [ICD-10 Code Search](#)

Institutional

In our Professional examples above and below, notice that simply opening the form instantly resulted in the insertion of a suggested ICD-10 code. Whenever the GEM table has only one possible match for the existing ICD-9 code, the utility will insert the GEM match for you. In this example, we have no other ICD-9 codes to match, so we can just check the "Coding Complete" box at the top and click the blue checkmark to save. It is important to understand that the ICD-10 matches inserted by the software **WILL NOT BE SAVED** unless you use the save button! If you want the data in the database to look just like you see on the screen, **be sure to exit by saving with the blue checkmark icon rather than closing the screen with the red X.**

Because the ICD-10 is more fine-grained than the ICD-9, there will be times when your old ICD/DSM code maps to more than one ICD-10 diagnosis. An example is the ICD-9 code 300.29, Phobia. Here is what you would see in that case:

Record Will Be Added

Frank R Adler ID: 2143658709 DOB: 07/06/1934

CMS Claim Setup: CMS DEFAULT CLAIM SETUP

☐ Coding Complete

ICD-9

Dx 1 296.21 Dx 2 300.29 Dx 3 Dx 4

ICD-10

Dx 1 F32.0 Dx 2 Dx 3 Dx 4

* RED prompt indicates ICD-10 dx equivalent not found OR multiple ICD-10 dx codes exist. Please select one from the list.

ADDITIONAL ICD-10

Dx Code Dx Code Dx Code Dx Code

Dx Code Dx Code Dx Code Dx Code

CODING ASSISTANCE

[AAPC](#) [ICD10Data.com](#) [ICD-10 Code Search](#)

Notice that Dx2 in the ICD-10 section now has a red prompt, and a red warning appears on the screen. Right-clicking the field shows the matching ICD-10 codes in the GEM table:

ICD-9 TO ICD-10 Equivalent

☐ Show all dx codes

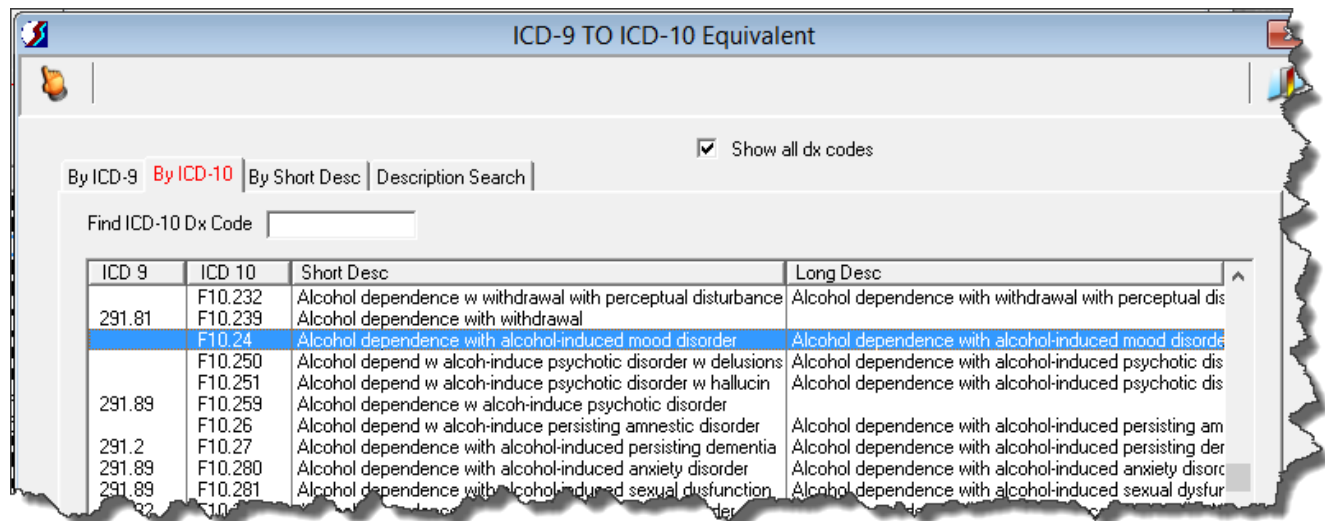
By ICD-9 | By ICD-10 | By Short Desc | Description Search

Find ICD-9 Dx Code

ICD 9	ICD 10	Short Desc	Long Desc
300.29	F40.218	Other animal type phobia	Other animal type phobia
300.29	F40.240	Claustrophobia	Claustrophobia
300.29	F40.241	Acrophobia	Acrophobia
300.29	F40.8	Other phobic anxiety disorders	Other phobic anxiety disorders

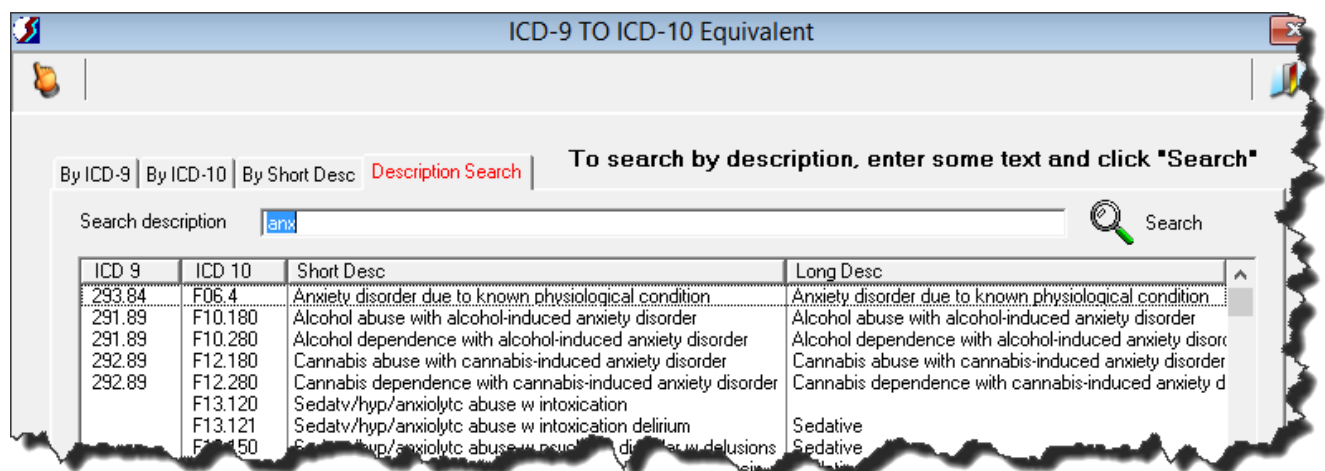
As always when coding for insurance filing, you should always select the most specific diagnosis possible. The more numbers to the right of the decimal point, the more specific the diagnosis. Select the best match from those shown, or, if you want to search the entire ICD-10 list, click the *Show all dx codes* checkbox at the top of

this list. Remember that there are many ICD-10 diagnoses that do not have ICD-9 analogs, in which case the ICD-9 column will be blank:



ICD 9	ICD 10	Short Desc	Long Desc
291.81	F10.232	Alcohol dependence w withdrawal with perceptual disturbance	Alcohol dependence with withdrawal with perceptual disturbance
	F10.239	Alcohol dependence with withdrawal	Alcohol dependence with withdrawal
	F10.24	Alcohol dependence with alcohol-induced mood disorder	Alcohol dependence with alcohol-induced mood disorder
	F10.250	Alcohol depend w alcoh-induce psychotic disorder w delusions	Alcohol dependence with alcohol-induced psychotic disorder w delusions
	F10.251	Alcohol depend w alcoh-induce psychotic disorder w hallucinations	Alcohol dependence with alcohol-induced psychotic disorder w hallucinations
291.89	F10.259	Alcohol dependence w alcoh-induce psychotic disorder	Alcohol dependence with alcohol-induced psychotic disorder
	F10.26	Alcohol depend w alcoh-induce persisting amnesic disorder	Alcohol dependence with alcohol-induced persisting amnesic disorder
291.2	F10.27	Alcohol dependence with alcohol-induced persisting dementia	Alcohol dependence with alcohol-induced persisting dementia
291.89	F10.280	Alcohol dependence with alcohol-induced anxiety disorder	Alcohol dependence with alcohol-induced anxiety disorder
291.89	F10.281	Alcohol dependence with alcohol-induced sexual dysfunction	Alcohol dependence with alcohol-induced sexual dysfunction

Click the appropriate tab to search **By ICD-9**, **By ICD-10**, **By Short Desc**, or using the full-text **Description Search**. The short description search is a “begins with” search and works the same way that last name search works in the Active Patient list: type a few letters to find the entries that have a Short Desc value that begins with those letters. The **Description Search**, on the other hand, works by searching the contents of both short and long descriptions and returns those entries that have your search text anywhere in one of those descriptions. In the example below, searching for “anx” returns rows with descriptions that includes “anx” anywhere in them. We therefore get some containing “anxiety”, but also some containing “anxiolytic”.



ICD 9	ICD 10	Short Desc	Long Desc
293.84	F06.4	Anxiety disorder due to known physiological condition	Anxiety disorder due to known physiological condition
291.89	F10.180	Alcohol abuse with alcohol-induced anxiety disorder	Alcohol abuse with alcohol-induced anxiety disorder
291.89	F10.280	Alcohol dependence with alcohol-induced anxiety disorder	Alcohol dependence with alcohol-induced anxiety disorder
292.89	F12.180	Cannabis abuse with cannabis-induced anxiety disorder	Cannabis abuse with cannabis-induced anxiety disorder
292.89	F12.280	Cannabis dependence with cannabis-induced anxiety disorder	Cannabis dependence with cannabis-induced anxiety disorder
	F13.120	Sedative/hypnotic/anxiolytic abuse w intoxication	Sedative/hypnotic/anxiolytic abuse w intoxication
	F13.121	Sedative/hypnotic/anxiolytic abuse w intoxication delirium	Sedative/hypnotic/anxiolytic abuse w intoxication delirium
	F13.150	Sedative/hypnotic/anxiolytic abuse w psychotic disorder w delusions	Sedative/hypnotic/anxiolytic abuse w psychotic disorder w delusions

Regardless of which tab you use for searching, when you find the one you want, highlight it and click the Select icon in the tool bar at the top of the search window.

If you need further assistance with the ICD-10 Prep Utility, please contact us at support@sosoft.com, or call 352-242-9100 and press option 2.