

Clinical Auditing and  
Compliance Division

CodeReview  
DeskTop 7.0C  
*Installation  
and Quick Reference*

Edition 1





## **Title and Publication Number**

*CodeReview 7.0C DeskTop Installation and Quick Reference*  
Part Number: D-CRDT7-01

## **Printing**

March, 2002. This document reflects Release 7.0 of CodeReview.

## **Copyright**

Copyright © 2002 McKesson Information Solutions Holdings, Ltd. All Rights Reserved.

Use of this documentation and related software is governed by a license agreement. This documentation and related software contains confidential, proprietary, and trade secret information of McKesson Information Solutions Holdings, Ltd. and is protected under United States and international copyright and other intellectual property laws. Use, disclosure, reproduction, modification, distribution, or storage in a retrieval system in any form or by any means is prohibited without the prior express written permission of McKesson Information Solutions Holdings, Ltd. This documentation and related software is subject to change without notice.

## **Trademarks**

CodeReview, Patterns Review, ClaimCheck, AutoCoder, and Pathways are registered trademarks of McKesson Information Solutions Holdings, Ltd. CACD, ProMatch, CodeReview Customization Utility, CodeReview DeskTop, Patterns Customization Utility, Patterns DeskTop, ClaimCheck, SmartSuspense, ClaimReview, Compliance Advisor, McKesson logo are trademarks of McKesson Corporation. All other product names are trademarks or registered trademarks of their respective holders.

*C o n t e n t s*

**About This Book**

Guide to CodeReview Documentation ..... vi  
    Additional Documentation for ProMatch ..... vii  
    Additional Documentation for Medicare CodeReview ..... vii  
How to Use This Book ..... viii  
Getting Customer Support..... viii  
Documentation Conventions..... ix

**Chapter 1 Installation**

Preparing to Install CodeReview DeskTop ..... 1-2  
Planning Your Installation..... 1-2  
Installing CodeReview DeskTop ..... 1-3  
Configuring Your System for Multi-User Support ..... 1-6  
    Starting the CodeReview DeskTop Database On the Server..... 1-6  
    Configuring the ODBC Settings..... 1-7  
    Starting CodeReview DeskTop Using the Shared Database ..... 1-9  
Uninstalling CodeReview DeskTop ..... 1-10

**Chapter 2 Getting Started**

Starting CodeReview DeskTop ..... 2-2  
Creating a Claim Header ..... 2-3  
Creating a Claim Line..... 2-6  
    Editing a Claim Line ..... 2-8  
    Deleting a Claim Line..... 2-8  
Customizing Processing Options..... 2-8  
    Record Type 001 ..... 2-9  
    Record Type 002..... 2-10

Record Type 003 .....	2-10
Record Type 004 .....	2-11
Processing a Claim .....	2-12
Using Help.....	2-13
Navigating through Help.....	2-13
Exiting CodeReview Desktop.....	2-13
<b>Chapter 3     Viewing, Printing, and Exporting the Recommendation Report</b>	
Viewing the Recommendation Report On Line.....	3-2
Printing the Recommendation Report .....	3-2
Exporting the Recommendation Report to an HTML or PowerBuilder Format .....	3-3
<b>Chapter 4     Reconfiguring the Environment Variables</b>	
Pointing to the Location of Knowledge Base Files .....	4-2
Pointing to Knowledge Base Files Located on Multiple Drives .....	4-3
Removing a Row From the Environment Variables Table .....	4-4
Indicating Which Knowledge Base Files to Use During Claim Processing.....	4-4
<b>Chapter 5     Identifying Processing Errors</b>	
Header Area Window (Claim Results) .....	5-1
System Control Window (Claim Results).....	5-2
<b>Chapter 6     Administering CodeReview DeskTop</b>	
Updating the Security File .....	6-2
Adding a New Password and User ID.....	6-2
Deleting a Password and User ID.....	6-3
Updating CodeReview DeskTop Lookup Tables.....	6-4
Synchronizing the ICD-9 and CPT-4 Files .....	6-5
Sync ICD9 from PM .....	6-5
Sync CPT4 from CCU .....	6-5
View PowerBuilder Reports .....	6-7

## About This Book

---

CodeReview DeskTop is a desktop reference tool that assists you to perform the following tasks:

- Answer provider appeals
- Test your organization's customization of the CodeReview knowledge base
- Provide immediate response to CodeReview inquiries

The CodeReview DeskTop runs with CodeReview software, and applies the same logic and results as the COBOL product. By using CodeReview DeskTop, you can enter a claim directly into a Windows environment, and get immediate recommendations with accompanying messages. You can also preview the Recommendation Report, and print it for your records.

The *CodeReview DeskTop Installation and Quick Reference Guide* provides installation instructions and a quick reference for using CodeReview DeskTop.

# Guide to CodeReview Documentation

In addition to the *CodeReview DeskTop Installation and Quick Reference Guide*, the following documents make up the CodeReview documentation set:

- *CRDT Help*  
An on-line document that explains how to set up and use CodeReview DeskTop.
- *CodeReview 7.0C Installation Guide*  
Describes how to: run conversion programs to convert your files from 5.xC format to 6.xC and 6.xC to 7.0C format, install CodeReview, and run CodeReview using the sample claims that McKesson provides.
- *CodeReview 7.0C Technical Guide*  
Explains the programming tasks necessary to incorporate CodeReview into your claims processing system. This guide also: explains how to activate ProMatch processing, discusses the technical differences between CodeReview and Medicare CodeReview, lists implementation considerations, and contains the record layouts and field descriptions for the files needed to configure your system for CodeReview processing. This guide provides information for all platforms that support CodeReview 7.0C.
- *CodeReview 7.0C Concepts and Clinical Foundations Guide*  
Provides an overview of CodeReview and its two optional, value-added modules: ProMatch and Medicare CodeReview. This guide discusses the processing logic that CodeReview uses to assess medical claims and suggests ways for your organization to communicate with providers both before and after you implement CodeReview. It also includes a glossary of CodeReview terms and a summary of clinical enhancements to CodeReview, Release 7.0C.
- *CodeReview Customization Utility (CCU) 2002K Clinical Release Notes and CodeReview Customization Utility (CCU) 2002K Technical Release Notes*  
Describes the 2002K CodeReview knowledge base. It also explains how to import customizations from the previous knowledge base, print knowledge base reports, and how to load the 2002K knowledge base onto your platform.

- *CCU Help*

An on-line document that explains how to use CCU to customize the CodeReview knowledge base.

## ***Additional Documentation for ProMatch***

If your organization purchased the ProMatch module, the CodeReview documentation set also includes:

- *Patterns Customization Utility 2002K Clinical Release Notes and Patterns Customization Utility 2002K Technical Release Notes*

Describes clinical enhancements to the Patterns knowledge base, and explains how to install and administer the Patterns Customization Utility (PCU™).

- *PCU Help*

An on-line document that explains how to use PCU to customize the ProMatch knowledge base.

## ***Additional Documentation for Medicare CodeReview***

If your organization purchased the Medicare CodeReview module, the CodeReview documentation set also includes:

- *Medicare CodeReview 2002K Clinical Release Notes and Medicare CodeReview 2002K Technical Release Notes*

Describes the Medicare CodeReview 2002K knowledge base, explains how to install the knowledge base, and explains how to load it onto your platform.



---

Throughout this guide, the letter *C* denotes software (for example, *7.0C*, and the letter *K* denotes knowledge base (for example, *2002K*).

---

# How to Use This Book

The following table lists where to find information in this document:

For information about...	See...
Installing CodeReview DeskTop	Chapter 1
Getting started with CodeReview DeskTop	Chapter 2
Viewing, printing, and exporting the Recommendation report	Chapter 3
Reconfiguring environment variables	Chapter 4
Identifying processing errors	Chapter 5
Administering CodeReview DeskTop	Chapter 6

## Getting Customer Support

If you encounter any difficulties using CodeReview DeskTop (CRDT), please refer to the documentation that accompanies the software (including *CRDT Help* on line). If that still does not resolve the problem, please do the following to assist the technical support representative in expediting the diagnosis and resolution of your problem:

- Record the nature of the problem and what you were doing just before it occurred
- Call from in front of your workstation with CodeReview open (if possible)

Contact the Customer Support Center for assistance by either of the following methods:

- Phone at 1.888.474.4262
- E-mail at [CACD.Support@McKesson.com](mailto:CACD.Support@McKesson.com)

The hours are Monday through Friday, 8:00am to 8:00pm, Eastern Standard time.

# Documentation Conventions

Throughout this manual you'll find certain conventions that help you use or locate important information, including:

- Computer Output Convention
- User Input Convention
- Keyboard Keys
- Note Symbol
- Caution Symbol

## Computer Output Convention

All computer output (such as the command prompt or a command-line message) appears in plain text in the Courier font. For example:

```
computer output looks like this
```

## User Input Conventions

Whenever you are prompted to enter input, the text you are supposed to enter appears in bold text in the Courier font. The system prompt may appear at the beginning (unbolded) and should not be entered. For example:

```
<system prompt> user input looks like this
```

Italics used in user input indicate user-supplied information, as in the example below.

```
<system prompt> user input variable
```

where *variable* is information that you supply.

## Keyboard Keys

Not all keyboards are identical. In an effort to impose uniformity, all keyboard keys that you must press to execute an action appear in upper-case letters throughout this manual, for example the ENTER key, ESC key, F-1 key, and so on.

## Note Symbol

Notes inform you of potential problems or important information.  
Notes look like this:



---

Important information appears in a note.

---

## Caution Symbol

Cautions alert you to potential obstacles, damage, or loss of data.  
Cautions look like this:



---

Information regarding potential obstacles, damage, or loss of data appears in a caution.

---



# *Installation*

---

This chapter describes the procedures required to install CodeReview DeskTop on the Windows 95, Windows 98, and the Windows NT platforms. The following topics are discussed:

- Preparing to install CodeReview DeskTop
- Planning your installation
- Installing CodeReview DeskTop
- Configuring your system for multi-user support
- Uninstalling CodeReview DeskTop

# Preparing to Install CodeReview DeskTop

Before installing CodeReview DeskTop, you should check hardware, software, and memory requirements. To successfully install and use CodeReview DeskTop, you must have the following:

- Pentium or above processor
- 128 MB RAM
- Windows or Windows NT 4.0
- A local or network CD-ROM drive
- PC-compatible mouse
- Color SVGA monitor with display 600x800 (256 color)

## Planning Your Installation

Before installing CodeReview DeskTop, you should choose the type of installation that you want to perform. McKesson has provided three types of installation:

- **Typical** — Installs all essential CodeReview DeskTop product components
- **Compact** — Installs the minimum CodeReview DeskTop product options
- **Custom** — Installs only CodeReview DeskTop components that you choose



---

Most end users use the Typical installation.

---

# Installing CodeReview DeskTop

To begin installing CodeReview DeskTop onto a workstation, do the following:

1. Place the CodeReview DeskTop compact disc in the CD-ROM drive.
2. Start Microsoft Windows if it is not already running. If it is running, McKesson recommends that you close all Windows programs.
3. Make sure that you run the setup program at the client workstation rather than at another workstation on the network.
4. Choose Run from the Start menu, and then enter the following command:

```
Z:\CRDT7_0\setup.exe
```

where

z: is your CD-ROM drive



---

To cancel the installation at any point, either press ESC or click the Cancel button in any installation window. If you would like to go back to a previous window, click the Back button in any installation window.

---

5. Click OK.  
The Welcome window appears.
6. Click the Next button in the Welcome dialog box.  
The User Information dialog box appears.
7. Check the information in this dialog box for correctness and change it if necessary.
8. Click the Next button in the User Information dialog box.  
The Choose Destination Location dialog box appears.
9. Choose the destination directory. The default destination directory for CodeReview DeskTop is  
C:\HB0C\CACD\CR\2002.



---

If you want to change the destination directory, click the Browse button in the Choose Destination Location dialog box, and then choose or enter a drive and directory in the Choose Directory dialog box. Do NOT use any spaces in the directory name.

---



---

If you change the destination directory, you must reconfigure the environment variables before running CodeReview DeskTop. For more information, refer to Chapter 4, “Reconfiguring the Environment Variables.”

---

10. Click the Next button in the Choose Destination Location dialog box.

The Setup Type dialog box appears.

11. Depending on the type of installation that you want to perform, do one of the following:
  - **If you want to install all essential components** for CodeReview DeskTop, leave the Typical option selected in the Setup Type dialog box, and then click Next. The Select Program Folder dialog box appears. Skip to step 14 on page 1-5.
  - **If you want to install the minimum components** for CodeReview DeskTop, click the Compact option in the Setup Type dialog box, and then click Next. The Select Program Folder dialog box appears. Skip to step 14 on page 1-5.
  - **If you want to choose which components to install** for CodeReview DeskTop, click the Custom option in the Setup Type dialog box, and then click Next.

The Select Components dialog box appears.

12. In the Select Components dialog box, you choose the components to install. By default, all components are selected.

Select and deselect components and parts as follows:

- **To select a component or part** — Click the space to the left of the component or part name. A check mark appears to the left of the component or part name and the Space Required field changes its value depending upon the components you have selected.

- **To deselect a component or part** — Click the check mark to the left of the component or part name. The check mark disappears and the Space Required field changes its value depending upon the components you have selected.

13. When you have finished selecting the components to install, click the Next button.

The Select Program Folder dialog box appears.

14. The Program Folders field in the Select Program Folder dialog box indicates the name of the program folder (program group) where your CodeReview DeskTop program icons will reside. The default program folder is HBOC\CACD\CR\2002.

Use the table below to indicate a program folder other than the default.

To...	Do This...
Create a new program folder where the CodeReview DeskTop program icons will reside	Enter a name for the new program folder in the Program Folders field
Place the CodeReview DeskTop program icons in an existing program folder	Double-click the name of an existing program folder in the Existing Folders list box

15. Click the Next button in the Select Program Folder dialog box.

The Start Copying Files dialog box appears. The Current Settings field in the Start Copying Files dialog box confirms the setup type, target folder, and user information.

The icon for CodeReview DeskTop is placed in the Start menu under *Programs: HBOC: CACD*. A program folder is also created.

16. Click the Next button in the Start Copying Files dialog box.

The CodeReview DeskTop Installation Program begins copying the programs and files associated with the installation to the target directory. The Installation Status bar appears, showing you the progress of the installation. When all the programs and files have been copied, the Setup Complete dialog box appears.

17. Click the Finish button to complete the installation program.

For information about signing on to CodeReview DeskTop, refer to “Starting CodeReview DeskTop” on page 2-2.

# Configuring Your System for Multi-User Support

To use CodeReview DeskTop as a multi-user product, you will need to have the Sybase SQL Anywhere 5.0 Server Database Software. Contact Sybase, Inc. to obtain the software for the estimated number of users who will connect to the CodeReview DeskTop database. Then, follow the steps in the topics listed below.

- Start the CodeReview DeskTop Database
- Configure the ODBC on your PC
- Start CodeReview DeskTop



---

If the Server database will be accessed by more than one person who will be performing customizations, McKesson recommends that you assign a specific user ID and password for the Database Administrator. For instructions on how to do assign User IDs and Passwords, refer to the *CodeReview DeskTop Help*.

---

## ***Starting the CodeReview DeskTop Database On the Server***

1. Copy the CodeReview DeskTop database to the server.



---

You can either copy the default database or a database that has your customized records.

---

2. Follow the instructions that you received with the SQL Anywhere 5.0 Server Database Software and set the SQL Anywhere server manager to the server version of the CodeReview DeskTop database.

For example, do the following:

- a. Open the Service Manger.
- b. Click the New button.
- c. Choose Network server.
- d. Type the name of the server <Server name> in the Service Name field.
- e. In the Parameter box, enter:

```
-n<server name><drive>\<directory>  
\database name -c##m
```

Where:

- Server name—Name of the service just added.
- Drive—The drive on which the database resides.
- Directory—The name of the directory to which the database has been copied.
- Database name—The name of a CodeReview DeskTop database.



---

CodeReview DeskTop uses two databases: **cacscomm.db** and **inrface.db**. Type the name of one of these databases in the Parameter box. After completing Step g, you will repeat this procedure and then type the name of the other database in the Parameter box.

---

- ##—The amount of memory (in megabytes) to be allocated as cache for running this database. McKesson recommends a minimum of 32MB.
- f. Select how this service will be started in the StartUp group box. McKesson recommends choosing Automatic because this will start the server database each time you start the server.
- g. Click OK.
- h. Repeat steps Step a through Step g and add your other database name.
- i. Click the Start button to start this service which will run your database.

## *Configuring the ODBC Settings*

To configure the ODBC to connect to the server version of the CodeReview DeskTop database, perform the following steps:

1. From the Start menu, choose Settings, and then Control Panel.
2. In the Control Panel window, open the 32-bit ODBC manager.  
The ODBC Data Source Administrator window appears.
3. On the System DSN tab, click the Add button.  
The Create New Data Source window appears.
4. From the list of Drivers, select Sybase SQL Anywhere 5.0.

5. Depending on the version of the ODBC Administrator that you are using, either click OK or Finish.

The SQL Anywhere ODBC Configuration window appears.

6. In the Data Source Name field type in your data source name.



---

Your data source name should be different than the defaults of *cacscmm.db* or *iniface.db*.

---

7. In the User ID field, type the userid supplied by McKesson.

8. Type the password supplied by McKesson.

9. In the Server Name field, enter the Server Name using *lowercase* letters.

10. In the Database Name field, type

*iniface*

11. In the Database Startup group box click the Network option, then click on the Browse button to locate DBCLIENT.EXE.

12. Click on File, then click on the Open button.

13. Click the Custom option.

14. Click the Options button.

The Startup Options window appears.

15. Add *your protocol (case sensitive)* to the path. If the path does not exist, type:

*c:\sqlany50\win32\dbclient.exe*



---

Protocol should define which type of network access you will use to connect to your database. McKesson recommends using: *TCPIP* for example *-xTCPIP*. This will use the *TCPIP* protocol.

---

16. In the Agent group box, select the Client option.

## Starting CodeReview DeskTop Using the Shared Database

1. From the Windows desktop:
  - a. Click the Start button.
  - b. Point to Programs, point to Hboc.
  - c. Point to CACD, point to CR, point to 2002, and then point to and click the CodeReview DeskTop icon.

The CodeReview DeskTop Sign In window appears.

2. Select the Show DB Source check box.
3. Click the Define button.

The CodeReview DeskTop Warehouses dialog box appears.

4. Click the New button.

The New Warehouse dialog box appears.

5. In the Data Source Name field, click the drop-down box to locate the database source name from your ODBC configuration file.
6. In the Profile Name field, enter your profile name.



---

The Profile name should be different from the default *interface*.

---

7. Click OK to return to the CodeReview DeskTop Sign In window.
8. In the database field, select the database profile from the drop-down list.
9. Complete the Sign In with your User ID and password information to connect to CodeReview DeskTop.

# Uninstalling CodeReview DeskTop

To uninstall CodeReview DeskTop, do the following:

1. From the Start menu, choose Settings and then choose Control Panel.
2. From the Control Panel window, double-click Add/Remove Programs.

The Add/Remove Program Properties dialog box appears.

3. On the list of programs, click CodeReview DeskTop.
4. Click the Add/Remove button.
5. Click Yes to the confirmation message.

The Remove Programs From Your Computer dialog box appears.

6. Click OK on the Remove Programs From Your Computer dialog box.
7. Click OK on the Add/Remove Program Properties dialog box.



---

The uninstall process does not remove the database files. You must go to Windows Explorer and delete the database files (for example, cacscmm.db and intrface.db.)

---



## *Getting Started*

---

This chapter explains the procedures necessary for you to immediately begin using CodeReview DeskTop. Topics include the following:

- Starting CodeReview DeskTop
- Creating a claim header
- Creating a claim line
- Customizing processing options
- Processing a claim
- Using *CodeReview DeskTop Help*
- Exiting CodeReview DeskTop

# Starting CodeReview DeskTop

1. From the Windows desktop:
  - a. Click the Start button.
  - b. Point to Programs, and then point to Hboc.
  - c. Point to CACD, point to CR, point to 2002, and then point to and click the CodeReview DeskTop icon.

CodeReview DeskTop displays the CodeReview DeskTop Sign In window.

2. In the User ID field, type your User ID.
3. In the Password field, type your password.



---

CodeReview DeskTop has two levels of access: *Browser*, which enables you to process a claim, and *Client DBA*, which enables you to use Browser features and gives you the capability to perform administrative tasks. The Client DBA level requires a password (documented on the enclosed Password Sheet); the Browser level does not require a password.

The password and user ID that you use to sign on to CodeReview DeskTop is linked to a security indicator. Each time you sign on to CodeReview DeskTop, a message displays indicating your access level for CodeReview DeskTop. For more information, refer to “Updating the Security File” on page 6-2.

---

4. If you want to view or change your datasource, select the Show DB Source check box, and complete the following fields:
  - Admin DB — The database profile ID for administration
  - Interface DB— The database profile ID for CodeReview DeskTop processing



---

If you do not know the appropriate database profile ID, contact McKesson Technical Support. (See the Preface.)

---

5. Click the OK button.

The CodeReview DeskTop window appears. Use this window to access the CodeReview DeskTop functions.



If your user ID...	Then...
Is at the Client DBA level	The CodeReview DeskTop window includes the Administration button  in the FrameBar. For information about administrative functions, see Chapter 6, "Administering CodeReview DeskTop."
Is at the Browser level	The CodeReview DeskTop window will not include the Administration button in the FrameBar.



Figure 2-1

FrameBar for the Client DBA Level

## Creating a Claim Header

1. From the CodeReview DeskTop main window, click the Claim Input button  on the FrameBar.

The Claim Input window appears, displaying the Claim Header subwindow.




---

The Claim Input window provides access to the following subwindows: Claim Header, Claim Lines, and System Control. To access these subwindows, click the appropriate tab at the top of the Claim Input window. When you open the Claim Input window, the Claim Header subwindow appears by default.


---




---

If you use a Lookup window to enter claim header information, you have the option to save the header for future use. If you enter claim header information directly on the Claim Header window, CodeReview DeskTop overwrites the existing claim.

---

2. Either complete the following fields in the Claim Info section of the Claim Header window, or click the Claim Info Search button  and use the Claim Lookup window to complete the following fields:


Field	Description
Claim ID	Unique identifier (numeric, alphabetic, or alphanumeric) that identifies a claim.
KBID	The CodeReview knowledge base ID to be used in CodeReview processing. If your organization does not customize the CodeReview knowledge base, enter knowledge base ID 99, the default knowledge base.
Process Method	Designates whether CodeReview, Medicare CodeReview, or both expert systems will process a claim.





---

For information about using a Lookup window, click the Lookup window's Help button.


---

3. If you want to use ProMatch processing, then do one of the following:
- Click the Process PMatch option, and complete the following fields in the ProMatch Info section of the Claim Header window.
  - Click the ProMatch Info Search button  and use the ICD9 Lookup window to complete the following fields (or if you know the ICD-9 code, just manually type it in).
  - Double-click an ICD9 field, and use the ICD9 Lookup window to complete the following fields.

Field	Description
PMatch KB	The ProMatch knowledge base ID to be used in ProMatch processing. If your organization does not customize the ProMatch knowledge base, enter knowledge base ID 99, the default knowledge base.
ICD9 (1-4)	Designates up to four ICD-9 codes to be included in ProMatch processing. You can only select these fields if the Process PMatch option is checked, indicating that ProMatch processing will occur.

4. Either complete the following fields in the Patient Info section of this window, or click the Patient Info Search button  and use the Patient Lookup window to complete the following fields (or if you know the Patient Info, just manually type it in)

Field	Description
Patient ID	Unique identifier (numeric, alphabetic, or alphanumeric) for each patient.
Patient Name	The patient's name.
Patient Gender	F (Female), M (Male), or U (Unknown)
DOB	The patient's date of birth in MM/DD/CCYY format. For example: March 8, 1965 = 03081965.
Age	The patient's age.

5. Either complete the following fields in the Provider Info section of this window, or click the Provider Info Search button  and use the Provider Lookup window to complete the following fields (or if you know the Provider Info, just manually type it in):

Field	Description
Provider ID	Unique identifier (numeric, alphabetic, or alphanumeric) for each provider.
Provider Name	The provider's name.





---

For information about the Provider Lookup window, click the Provider Lookup window's Help button.

---

6. Click the Save button (if you are just "playing around", you do not have to click the Save button).
- After creating a claim header, click the Claim Lines tab and add detail lines on the Claim Lines window. If you used the Claim Lookup window to create the claim header, you can also repeat the above to create additional headers.

# Creating a Claim Line

1. On the Framebar, click the Claim Input button , and then click the Claim Lines tab.

The Claim Input window appears.

2. Click the Insert button (or press the Tab button to the end of the line).

A new row displays in the Claim Line table. CodeReview automatically assigns a number to the *No.* field, which indicates the number of claim lines entered for processing. (You can also enter the Claim No. manually.)

3. Complete the following fields on Claim Lines table:

Field	Description
Cpt4	The CPT-4™ code assigned to this claim line. Double-click this field and use the CPT4 Lookup window to select a CPT-4 code. (You can also click a multiple of CPT-4 codes resulting in the addition of multiple claim lines.) <b>Note:</b> CodeReview automatically enters the American Medical Association's short CPT-4 description for the selected CPT-4 code into the Desc field.
Mod 1	Modifier code, optional. CodeReview processes all valid CPT-4 and HCPCS modifiers.
Mod 2	Second modifier code, optional.
From Date	The beginning date of service for the service/procedure on the claim line.
To Date	The ending date of service for the service on the claim line.
POS	A CMS or McKesson Place of Service code. Either double-click this field and use the POS Lookup window to select a POS code, or enter a code in the field. Default: 11. <b>Note:</b> For information about the POS Lookup window, click the POS Lookup window's Help button.
Srv Unts (Service Units)	If the service/procedure occurred once on the claim, enter 1. If the service/procedure occurred more than once, enter the appropriate number. Default: 1.
Charged Amt	The dollar amount, including dollars and cents, that the provider charged for the procedure/service performed.

Field	Description
Allowed Amt	The dollar amount, including dollars and cents, that the payor allowed for the procedure/service performed.
ICD9 1–4 (ICD-9 Pointers)	If you use ProMatch processing, you can use these fields to point the claim line to a particular ICD-9 code(s) in the claim header. This causes the claim line to process exclusively against the ICD-9 code(s) specified. If the pointer is not activated, the claim line processes against all of the ICD-9 codes entered in the Claim Header. To select a pointer, double-click the ICD9 field with the left-mouse button, and then select an ICD-9 code from the list.
CR Keep (CodeReview Keep Flag)	Indicates whether to keep or exclude line items from processing. K = CodeReview automatically accepts the claim line. X = CodeReview automatically excludes a claim line; ProMatch processing continues. (blank) = CodeReview processes the claim line without an override.
PM Pre (ProMatch Preauthorization Flag)	Indicates whether ProMatch automatically passes a claim line. Y = ProMatch automatically passes a claim line. (blank) = ProMatch does not automatically pass a claim line; ProMatch processing continues.




---

CPT stands for *Physicians' Current Procedural Terminology*. 'CPT' is a trademark of the American Medical Association (AMA).

---




---

The Centers for Medicare & Medicaid Services (CMS, formerly known as HCFA—Health Care Finance Administration) created the Common Procedure Coding System (HCPCS Level II codes) to supplement CPT codes. These codes, which are described in the *HCPCS Level II Code Book*, cover services not covered by CPT codes,

---

4. Click the Save button (if you are just “playing around”, you do not have to click the Save button).
5. To create an additional claim line, either click the Insert button or tab through the end of an existing claim line.
6. Either click the Close button to close this window, or process the claim.




---

For processing information, see “Processing a Claim” on page 2–12.

---

## *Editing a Claim Line*

1. Click a row on the Claim Lines table.
2. Edit the appropriate fields.
3. Click the Save button.

## *Deleting a Claim Line*

1. Click a row on the Claim Lines table.
2. Click the Delete button.

**Tip:** To quickly delete a claim line, clear the CPT4 field and tab to the next field.


# Customizing Processing Options

The System Control window (Claim Input) allows you to customize CodeReview DeskTop processing. Use this window to select the processing options that best meet your claims processing needs.



---

To access the System Control window (Claim Input), click the Claim

Input button  on the FrameBar, and then click the System Control tab.

---

## Record Type 001

Option	Description
Add Mod -26	If selected, add a Modifier -26 when appropriate. Otherwise, the CPT code goes through normal processing.
Modifier -26	If selected, Modifier -26 is valid for all codes. Otherwise, Modifier -26 is valid for those codes that CodeReview deems appropriate.
Modifier -51	If selected, CodeReview automatically adds Modifier -51 to secondary output codes where applicable. Otherwise, CodeReview does not automatically add a Modifier -51 to secondary output codes.
Units Expansion	<p>If selected, this option allows you to enter one line item of a code with units greater than one, instead of entering numerous line items for the same code. If not selected, CodeReview assumes that every line item is one unit, even if more than one is entered.</p> <p><b>Note:</b> The expansion capabilities of the Number of Units feature depends on the value you set for the User Line Item Limit. If the value for the expansion of the units exceeds the user line limit, then CodeReview cannot successfully process with the User Line Limit, and issues an error message.</p>
Date Sensitivity (Date Sense)	Determines whether CodeReview uses the rule in existence at the time of the date of service, or the most current rule. If selected, CodeReview uses the rule in existence at the time of the date service, on the line item. Otherwise, CodeReview uses the most current rule.
Modifiers -24, -25, 57, -59, -76	<p>Indicates how CodeReview processes Modifiers -24, -25, 57, -59, -76.</p> <ul style="list-style-type: none"> <li>• Question—Automatically question the code because of the presence of the modifier.</li> <li>• Ignore—CodeReview does not question or group the code. The code is eligible for other processing.</li> <li>• Accept—Do not automatically question the codes. CodeReview groups the codes based on these modifiers.</li> </ul>
Write Log	Determines whether to produce a log file detailing why particular claims are failing and what edit errors are being produced. To produce a log file containing this information, select this option. McKesson recommends that you use the log file only for debugging purposes.

Option	Description
Write Good Log	Select this option only if you chose the Write Log option to create a log file. If you select this option, the Write Log file records claims that processed normally, as well as problem claims. Otherwise, only problem claims are recorded.
Dump Interface	If selected, CodeReview dumps the Interface Area into a flat file before and after processing. Use this option for debugging purposes only. For detailed information about this option, refer to the <i>CodeReview 7.0C Technical Guide</i> .
User Line Item Limit	Defines the screen display limit for online users; it is used with the Units of Expansion option. If you have activated the Units of Expansion option, you must set the User Line Limit option also. If the total line items is greater than your screen can accommodate, CodeReview will not expand line items. Default: 100.
Dupe Logic and Asst Surg	<p>Controls how to process duplicate logic (Modifiers -50, -RT, -LT) and assistant surgeon (Modifiers -80, -82, -82, -AS). The choices are as follows:</p> <ul style="list-style-type: none"> <li>• Normal—Click this for either Medicare CodeReview or CodeReview, but you want to process normally where interact rules apply</li> <li>• MedCR—Click this if you have both Medicare CodeReview and CodeReview, but you want to use Medicare CodeReview's processing logic. Interact rules do not apply.</li> <li>• CR—Click this if you have both Medicare CodeReview and CodeReview, but you want to use CodeReview's processing logic. Interact rules do not apply.</li> </ul>

## ***Record Type 002***

Record Type 002 allows the default company name to display on the Recommendation report.

## ***Record Type 003***

The Record Type 003 area stores settings for certain CPT-4/HCPCS modifiers for which CodeReview DeskTop does not have processing logic. For a list of these modifiers, and their default settings, refer to Table 2-1, "Modifier Defaults for the 003 Record," on page 2-11.




---

Before setting modifier options, discuss your organization's modifier requirements with your clinical staff. Checking a modifier option box means that CodeReview DeskTop questions any surviving output code that has this modifier. Not checking a modifier option box means that CodeReview DeskTop ignores the modifier and accepts any surviving output code that has this modifier.

---

Table 2-1

Modifier Defaults for the 003 Record

Modifier	Default
21	Ignore the modifier
22	Ignore the modifier
23	Ignore the modifier
32	Ignore the modifier
47	Ignore the modifier
52	Ignore the modifier
53	Ignore the modifier
54	Ignore the modifier
55	Ignore the modifier
56	Ignore the modifier
58	Ignore the modifier
62	Ignore the modifier
66	Ignore the modifier
77	Ignore the modifier
78	Ignore the modifier
79	Ignore the modifier
90	Ignore the modifier
91/QR	Ignore the modifier
99	Ignore the modifier
E1	Ignore the modifier
F1	Ignore the modifier
G1	Ignore the modifier
P1	Ignore the modifier
T1	Ignore the modifier

## ***Record Type 004***

The Record Type 004 area stores 33 modifiers in which you can enter any two-character alphanumeric combination. For example, A1, ZY, 6P, and so on. For detailed information about this option, refer to either the *CodeReview Technical Guide* or the *CodeReview Concepts and Clinical Foundations Guide*.



---

Before setting modifier options, discuss your organization's modifier requirements with your clinical staff.

---

## Processing a Claim



---

To process a claim with a customized knowledge base, you must go to the Environment Groups window and point to the location of the customized knowledge base. For more information, refer to Chapter 4, “Reconfiguring the Environment Variables.”


---

1. Create a claim header. See “Creating a Claim Header” on page 2-3.
2. Create a claim line. See “Creating a Claim Line” on page 2-6.
3. Customize the processing options (optional). See “Customizing Processing Options” on page 2-8.
4. On the Claim Lines window click the Processing button.

If processing is...	Then...
Successful	The Input/Output Area window appears with the processing results. For information about viewing the Recommendation report, refer to Chapter 3, “Viewing, Printing, and Exporting the Recommendation Report.”
Not successful	Either the Header Area window (Claim Results) or the System Control window (Claim Results) appears with error message information. For information about resolving errors, refer to Chapter 5, “Identifying Processing Errors.”

## Using Help

You can access the CodeReview DeskTop Help by performing any of the steps below:


- Clicking on the question mark button  that appears in the FrameBar
- Using the SHIFT+F1 keys to get Help for a displayed window
- Using the F1 key to access the Table of Contents page
- Clicking the Help button in any CodeReview DeskTop window
- Clicking the Help menu at the top of the CodeReview DeskTop main window

### *Navigating through CodeReview DeskTop Help*

You can navigate through the *CodeReview DeskTop Help* either by clicking a topic in the Contents or by clicking a cross-reference jump or pop-up contained within a topic. Jumps and pop-ups appear in a different color than the surrounding text. You can distinguish jumps from pop-ups by their underlines: a solid line underlines jumps and a dashed line underlines pop-ups.

## Exiting CodeReview Desktop

To quit CodeReview DeskTop, do one of the following:

- On the FrameBar, click the Exit button .
- From the File menu, Choose Exit.
- Press the Alt+F4 keys



## *Viewing, Printing, and Exporting the Recommendation Report*

---


The Recommendation report documents the CodeReview clinical recommendations for the last claim that CodeReview processed. If you process with Medicare CodeReview and/or ProMatch, these processing results are included in this report.

The report's detailed explanations provide concise, accurate reasons for the CodeReview recommendations. You can give this information to patients and providers to justify non-payment, or keep it for your records.

This chapter explains how to perform the following tasks:


- View the Recommendation report on line
- Print the Recommendation report
- Export the Recommendation report to a Hypertext Markup Language (HTML) or PowerBuilder (PSR) format

## Viewing the Recommendation Report On Line

1. On the FrameBar, click the Claim Results button .
2. On the Claim Results window, click the Report tab.

The Recommendation report displays for the last claim that CodeReview processed.


## Printing the Recommendation Report

1. On the FrameBar, click the Claim Results button .
2. On the Claim Results window, click the Report tab.

The Recommendation report displays for the last claim that CodeReview processed.

3. On the Report window, click the Print button.

The Print Preview window appears.

4. On the Print Preview window, choose the Print button  to print the report, or click the Close button to close the window.


# Exporting the Recommendation Report to an HTML or PowerBuilder Format



---

To print a Recommendation report in HTML format, you must have Microsoft Internet Explorer 4.0 or greater installed. Your configuration affects the font choice for the report. If your report does not print properly, adjust your font size in Internet Explorer as appropriate.

---

1. On the FrameBar, click the Claim Results button .
2. On the Claim Results window, click the Report tab.  
The Recommendation report displays for the last claim that CodeReview processed.
3. On the Report window, select one of the following options:
  - **HTML** (Report in HTML format)
  - **PB Rpt** (PowerBuilder Report)
4. To export the report to the directory where CodeReview DeskTop is installed, click the Save As button.


The Select File dialog box displays, and you must:

- d. Use the controls in the Select file dialog box to specify where you want to store the file.
  - e. Name the file in the File Name field.
  - f. Click the Save button.
  - g. Click OK in the confirmation message box
5. To open a report that was previously saved in a PowerBuilder format, select the PB Rpt Export option, and then click the Open button.

The Select File dialog box displays, and you must:

- Use the controls in the Select file dialog box to specify the report file.
- Click the Save button.

The Print Preview window appears.

- Either click the Print button  to print the report, or click the Close button to close the window.



## *Reconfiguring the Environment Variables*

---

If your organization customizes knowledge base files or changes the destination directory during the CodeReview DeskTop installation, then you must reconfigure the environment variables before running CodeReview DeskTop.

This chapter explains how to reconfigure your environment variables to:

- Point to the location of the knowledge base files
- Point to knowledge base files located on multiple drives



---

If your organization uses the default knowledge base that McKesson supplies and does not change destination directory during installation, then this chapter does not apply to you.

---

# Pointing to the Location of Knowledge Base Files

1. From the Claim Input window, select the System Control tab.
2. Click the Environment button.

CodeReview DeskTop displays the Environment Groups window.

3. On the Environment Groups window, check the Default Group(s) for the files to which you need to point.

The current path for the file displays.

4. Double-click the Search button .

The Browse Directory dialog box displays.

5. Use the controls in the Browse Directory dialog box to specify the location of the knowledge base file.

6. Click the Save button.


The Default Group field displays the path for the location of the knowledge base file.

## Pointing to Knowledge Base Files Located on Multiple Drives

1. On the Environment Groups window, click the Detail button.  
The Environment (Detail) window appears.
2. If you are processing with the Medicare CodeReview and/or ProMatch, click the Medicare and/or ProMatch option.  
The Environment Variables table expands to include the location of knowledge base files for Medicare CodeReview and/or ProMatch.
3. On the Environment (Detail) window, highlight a row and then click the Insert button.

A new row displays in the Environment Variables table.

Row	Description
File Name	Name of a knowledge base file. For example: hpract.
File Description	Description of a knowledge base file.
Default	Indicates which knowledge base files to use to process a claim.
Exists	Indicates whether the default files exist in the specified path. Yes = The default file exists in the specified location. No = The default file does not exist in the specified location.
Path	The path for the knowledge base files.

4. Click the Search button  next to the new row.  
The Select File dialog box appears.
5. Use the controls in the Search Dialog box to specify the location of the knowledge base file.
6. Confirm that the Save As Type field contains the same file format as the file that you selected.
7. Click the Save button.

The row points to the location of the knowledge base file. If the *Exists* field says *No*, you can no longer access this file. (Its location on the network, for example, might not be available.)

## ***Removing a Row From the Environment Variables Table***

1. Click a row on the Environment Variables table.
2. Click the Delete button.
3. Click the Save button.

## ***Indicating Which Knowledge Base Files to Use During Claim Processing***

1. Click the row on the Environment Variables table that points to the appropriate knowledge base file.
2. Click the Default option.



---

By default, CodeReview DeskTop points to the knowledge base files that McKesson supplies.

---

3. Click the Save button.



## *Identifying Processing Errors*

---

If CodeReview DeskTop processing is not successful, either the Header Area window (Claim Results) or the System Control window (Claim Results) displays to help you determine the cause of the error. This chapter helps you to interpret the information displayed on these windows.

### **Header Area Window (Claim Results)**

This window summarizes the header information that was entered on the Claim Header (Claim Input) window and indicates which processing options (flags) caused a processing error.

Use the ICD9 Validation section of the Header Area window (Claim Results) to review the ICD-9 codes used to process the claim. This section of the window indicates whether the ICD-9 codes that you entered were valid codes, and states which pattern was used to determine the diagnosis.

# System Control Window (Claim Results)

Use the Read Only fields on the System Control window (Claim Results) to help detect processing errors.

Table 5-2 Runtime Flags

Flag	Description
Claim Number	Unique number that identifies the claim.
Program Stop Error Flag	A critical error occurred, which must be fixed before processing can continue. For example, a missing knowledge base file.
Claim Stop Error Flag	A claim level error occurred that prevents the claim from processing correctly.
Abend Program ID	If processing ends abnormally, this field identifies the program ID where the error occurred.
Abend Paragraph ID	If processing ends abnormally, this field identifies the paragraph ID of the program that caused the error.
Abend File ID	If processing ends abnormally, this field identifies the file ID of the file that caused the error.
Abend File Status	If processing ends abnormally, this field identifies the file status associated with the error: 01 = Invalid read 02 = File not open 03 = Invalid write 04 = Other
Abend File Func	If processing ends abnormally, this field identifies the function where the abend occurred (that is, read, write, or open).
Abend Record Key	If processing ends abnormally, this field displays the record key causing the abend.
Edit Error Message	CodeReview found an error on the claim.
Write Log	CodeReview produced a log file that contains specific information on why the claim failed, or what edit errors are being produced. McKesson recommends that you use the log file only for debugging purposes.
Write Good Log	If you chose to produce a log file, then Y indicates that the log contains log records for claims that processed normally as well as problem claims.
Dump Interface	CodeReview dumps the interface area to a flat file before and after processing. Use this field for debugging purposes only.
Dump Int Type	Controls the interface area dump logic.

Table 5-3

Header Flags

<b>Flag</b>	<b>Description</b>
Edit Error	Indicates whether CodeReview found a claim line error. If there is a claim line error, the Detail Flags section of this window indicates the claim line number and the type of error. Otherwise, the Detail Flags section is blank.
KB ID Error	There is no corresponding Record Type 003 for the knowledge base on the hprcntl file.
Claim Num Error	Indicates an error if the claim number is all spaces or all underscores.
Cntrl 001 Error	One of the fields in the Record Type 001 is set incorrectly. See the System Control (Claim Input) window.
Units Ser Error	An error exists in the units of service data in the claim. For example, a non-numeric unit of service field, or an invalid range of from and to dates.
User Limit Error	The number of lines in a claim exceeds the user line limit.
Proc Pmatch Error	An invalid ProMatch process method was entered.
Pmatch Failed	ProMatch failed at least one line on this claim. (That is, ProMatch processing issued a result code other than PAS, RED, INP, or IND.)
Proc Method Error	An invalid process method was entered.
HPR Limit Error	The number of lines in a claim exceeds the configured line limit, or the user line limit.
Patient ID Error	Indicates an error if the patient ID is all spaces or underscores.
DOB Error	An error with the patient's date of birth.
Age Error	An error with the patient age field.
Gender Error	An error with the patient gender code. Valid codes are M (Male), F (Female), and U (Unknown)
Provider ID Error	Indicates an error if the provider ID is all spaces or underscores.



Chapter  
6

## *Administering CodeReview DeskTop*

---

This chapter describes procedures for the CodeReview administrator to update the:

- Security file
- CodeReview DeskTop lookup tables
- Synchronizing the ICD-9 and CPT-4 files
- Retrieving a previously saved report in PowerBuilder format

# Updating the Security File

Use the Security option within the DBA Admin window to update password and user ID information. Security file maintenance is password-protected and default passwords are shipped with CodeReview DeskTop (see the CodeReview DeskTop Password Sheet). The default passwords are linked to a security indicator that controls the level of functionality you can access within CodeReview DeskTop.



---

You cannot delete the default user ID and password.

---


## *Adding a New Password and User ID*



---

Before adding a new password and user ID, you must close any CodeReview DeskTop windows that you have open.

---

1. From the FrameBar, click the DBA Admin button .
2. From the Select Product list, double-click *DBA Admin*.
3. From the Select Product list, double-click *Security*.
4. To add a new password, click the Insert button.  
CodeReview DeskTop automatically completes the following fields in the new data line:
  - Product
  - Time stamp
5. In the User ID field, enter a user identification code.
6. Type in a password.
7. In the Security Level list, choose one of the following options:
  - Browser (claims processing rights)
  - Client DBA (claims processing and administrative rights)
8. In the comment box, enter any information that you want to associate with the new password and user ID.
9. To save your changes, click the Save button.

## *Deleting a Password and User ID*



---

Before deleting a password and user ID, you must close any CodeReview DeskTop windows that you have open.

---

1. From the FrameBar, click the DBA Admin button .  
CodeReview DeskTop displays the Application Utilities window
2. Double-click *DBA Admin*.
3. Double-click *Security*.
4. Select the User ID that you want to delete.
5. Click the Delete button.
6. Click *Yes* on the confirmation message.
7. To save your changes, click the Save button.

# Updating CodeReview DeskTop Lookup Tables

You can update the following CodeReview DeskTop tables from the Interface Admin. window (under the main window of Application Utilities):

- Patient Lookup table
- Place of Service table
- Provider Lookup table

For information on updating these tables, click the Help button on the respective tables above.

To export the table information to another location, click the Open button. When the Select File dialog box displays, you should perform the following steps:

1. Use the controls in the Select file dialog box to specify where you want to store the file.
2. Confirm that the Save As Type field contains the same file format that you selected at the Report window.
3. Name the file in the File Name field.
4. Click the Save button.
5. Click OK in the confirmation message box that is displayed.

# Synchronizing the ICD-9 and CPT-4 Files

Use these windows to update (synchronize) your ICD-9 and CPT-4 files. The ICD-9 file comes from the Patterns Customization Utility (PCU) for Patterns (ProMatch) knowledge base, and the CPT-4 file comes from the CodeReview Customization Utility (CCU) knowledge base.

## *Sync ICD9 from PM*

1. After double-clicking the Sync ICD9 from PM icon, CodeReview DeskTop displays the Sync ICD9 from PM window, which includes a list of all the ICD-9 codes (diagnoses).
2. Click the Import button.  
CodeReview DeskTop displays the Select a database profile for: PCU window.
3. Find and select the current PCU database profile. For example, PCU2002.
4. Click the OK button.  
CodeReview DeskTop displays the Database is Connected window.
5. Click the Yes button to proceed.  
CodeReview DeskTop displays a piping message. When piping has completed, CodeReview DeskTop displays the updated (synchronized) ICD-9 codes.
6. Click the Close button.

## *Sync CPT4 from CCU*

1. After double-clicking the Sync CPT4 from CCU icon, CodeReview DeskTop displays the Sync CPT4 from CCU window, which includes a list of all the CPT-4/HCPCS codes (services and procedures).
2. Click the Import button.  
CodeReview DeskTop displays the Select a database profile for: CCU window.
3. Find and select the current CCU database profile. For example, CCU2002.
4. Click the OK button.

CodeReview DeskTop displays the Database is Connected window.

5. Click the Yes button to proceed.

CodeReview DeskTop displays a piping message. When piping has completed, CodeReview DeskTop displays the updated (synchronized) CPT-4/HCPCS codes.

6. Click the Close button.

## View PowerBuilder Reports

This window allows you to view previously saved PowerBuilder (PSR) reports. Here are the steps to perform this task:

1. After double-clicking the View PB Reports icon under the Application Utilities window, CodeReview DeskTop displays the Select A PB Report for Viewing window.
2. Use the controls in the Select file dialog box to specify where you want to retrieve the file.
3. Click the Open button.  
The report you specified displays on your screen.
4. If you wish to print the report, click the Print button.

