

Hank.ai

2.0.5 — Last update: 11 July 2023

hank.ai

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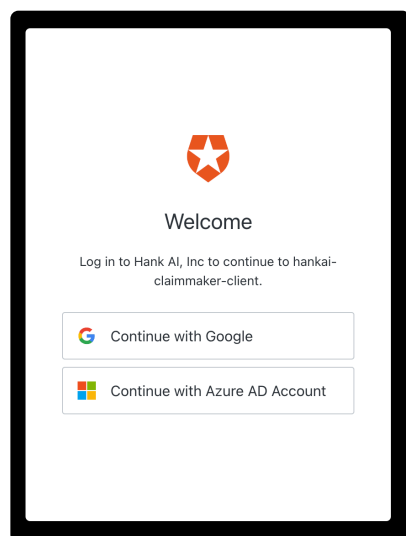
1. Getting Started

1. Navigate to <https://claimmaker.hank.ai/> in your browser.

NOTE: Preferred Browsers: Chrome and Edge



2. Select your login type from the options listed. NOTE: Please contact Hank support (ui-support@hank.ai) for assistance if you're having trouble with your username or password.



3. Once logged in, By default, the selected view is “Coder View”. This view will be used to perform the majority of functions described in the document. The “Reconcile View”, which can be accessed using the tabs at the top of the screen (see image below), will also be used to create cases when a facility fails to send the documentation for a scheduled patient in the automatic feed or the coder identifies a missing document during medical coding activities.

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2. Coder View Layout

The screenshot displays the Hank Claim Maker interface in 'Coder View' mode. The top navigation bar includes 'Hank Claim Maker', 'Coder View' (selected), 'Admin View', 'Reconcile View', and 'Data Entry View'. A user profile for 'Amy Noll' is visible in the top right.

The interface is divided into five main sections, numbered 1 through 5:

- Batch Selection Pane (1):** A table titled 'Batches and Cases' showing 8 batches. The selected batch is 04, 'Scanned', dated 2022-12-01, with 05 total cases.
- Case Selection Pane (2):** A table titled 'Showing 5 of 5 Cases (0 Completed)'. The selected case is 18, 'New', 'OK', for 'MAINMEN, JUICY C'.
- Manage Case Pane (3):** A 'Case Details (18)' form showing case state, DOS, P-Status, Patient Name, DoB, MRN, Diagnosis, Procedure, and Primary Insurance.
- Manage Line Items Pane (4):** A 'Manage Line Items' table with columns for Proc CPT, Anes ASA, ICD Codes, Modifiers, and Provider. It includes 'Add', 'Complete', 'Box 19', 'Clear', and 'Delete' buttons.
- View Documents Pane (5):** A 'Documents' section showing a 'Facesheet' document with patient information and medical history.

1. Batch Selection Pane

Use this area to select a batch to be reconciled or remediated. When creating a case, you must first ensure that the appropriate batch is selected in this pane.

2. Case Selection Pane

When a case is selected in this pane, all remaining panes are updated to link to the data for the selected case.

3. Manage Case Pane

This area is used to update the state, status, and notes for the selected case.

4. Manage Line Items Pane

This area is used to add line items to the claim for the selected case and will be populated by the ACE medical coder after the batch has been reconciled. Edits to this area should not be made by Summit personnel.

5. View Documents Pane

Use this pane to view the currently available documentation for a given case and to attach documents for manually created cases or cases for which the automatically loaded documentation is insufficient.

Batches and Cases

Showing 8 of 8 Batches

ID	Facility Name	DOS	State	Total Cases
09	Manual	2023-03-14	New	02
08	Automated	2023-03-14	New	01
07	Scanned	2023-02-01	New	01
02	Scanned	2023-01-12	New	07
01	Manual	2023-01-12	New	02
03	Automated	2023-01-12	New	06
04	Scanned	2022-12-01	New	05
05	Scanned	2020-12-01	New	01

Showing 5 of 5 Cases (0 Completed)

ID	Case State	State Reason	Patient Full Name	DE	Notes
18	New	OK	MAINMEN, JUICY C	No	Produced by DocuVision Task [2709] for Document [Original 2] in Batch [2] on DOS [2023-01-12].
11	New	OK	PATRICK, PATSY L	---	
16	New	OK	PATRICK, PATSY L	No	Produced by DocuVision Task [2709] for Document [Original 2] in Batch [2] on DOS [2023-01-12].
14	New	OK	VEDDER, BILLY	No	Produced by

Case Details (18)

Case State	New	State Reason	OK
DOS	2022-12-01	Batch ID	4
P-Status	---	CMS Case Base Units	---
Patient Name	MAINMEN, JUICY C	Patient Sex	M
DoB (Age)	1961-03-29 (62)	ENCN	---
MRN	000028604	Anes Type	---
Diagnosis	EGD POSS DILATATION/COLON		
Procedure	---		
Primary Insurance	1. MEDICARE PART B		

Documents 2

Facesheet Supporting Document

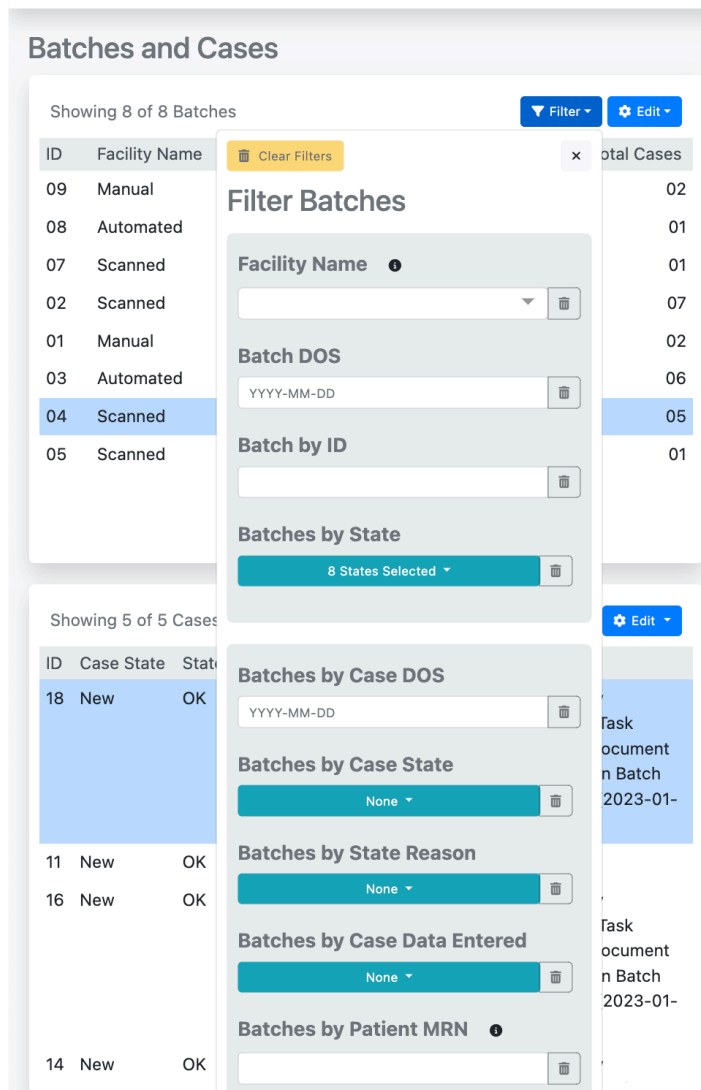
Last Updated:

- 1. Batch Selection Pane**
When a batch is selected in this pane, the Case Selection Pane (2) is updated with the list of cases for the selected batch.
- 2. Case Selection Pane**
When a case is selected in this pane, all remaining panes are updated to link to the data for the selected case.
- 3. Manage Case Pane**
This area is used to update the state, status, and notes for the selected case.
- 4. Manage Line Items Pane**
This area is used to add line items to the claim for the selected case and will be populated by the ACE medical coder after the batch has been reconciled. Edits to this area should not be made by Summit personnel.
- 5. View Documents Pane**
Use this pane to view the currently available documentation for a given case and to attach documents for manually created cases or cases for which the automatically loaded documentation is insufficient.

4. Schedule Reconciliation

1. Follow the instructions in the Getting Started section to open the Hank user interface, log in, and navigate to the “Reconcile View”.
2. (Optional) Using the filter control on the upper right of the Batch Selection Pane [1], type the name of the facility to be reconciled in ALL CAPS in the Facility Name field [2] (do not press return), and using the “Batches by State” dropdown [3], choose “New”. NOTE: The column headers, e.g. DOS, can be clicked to sort the results [4].

Hank Claim Maker



Batches and Cases

Showing 8 of 8 Batches

Filter Edit

ID	Facility Name	Batch DOS	Batch by ID	Batches by State	Batches by Case DOS	Batches by Case State	Batches by State Reason	Batches by Case Data Entered	Batches by Patient MRN	Total Cases
09	Manual									02
08	Automated									01
07	Scanned									01
02	Scanned									07
01	Manual									02
03	Automated									06
04	Scanned									05
05	Scanned									01

Showing 5 of 5 Cases

ID	Case State	Status
18	New	OK
11	New	OK
16	New	OK
14	New	OK

1. Select a “New” batch to be reconciled in the Batch Selection Pane. Compare the reconciled schedule supplied by the source facility EMR to the Patient Full Name entries in the Case Selection Pane to reconcile the batch. Note that the cases can be sorted by the Patient Full Name.
1. When all patients for a given DOS and facility are present and accounted for in the cases for the associated batch, navigate to the “Coder View” using the tabs at the top of the screen.
2. Select the batch from the previous steps.

4.1. Create New Batch (If needed)

#Select a “New” batch to be reconciled in the Batch Selection Pane. Compare the reconciled schedule supplied by the source facility EMR to the Patient Full Name entries in the Case Selection Pane to reconcile the batch. Note that the cases can be sorted by the Patient Full Name.

If a batch does not exist for the Date of Service, you can manually create one.

Select ‘Reconcile View’ from the views at the top of the screen. Then select the ‘Create’ tab in the Case Pane.

Create a new Batch.

Use this same space to add any Cases to this Batch as needed.

The screenshot displays the Hank Claim Maker application interface. At the top, there are navigation tabs: 'Coder View', 'Admin View', 'Reconcile View' (highlighted with a red box), and 'Data Entry View'. A user profile for 'Amy Noll' is visible in the top right corner.

The main content area is divided into three sections:

- Batches and Cases:** This section contains two tables. The first table, 'Showing 7 of 7 Batches', lists batches with columns for ID, Facility Name, DOS, State, and Total Cases. The second table, 'Showing 3 of 3 Cases (0 Completed)', lists cases with columns for ID, Case State, State Reason, Patient Full Name, DE, and Notes.
- Create New Batch:** This section is titled 'Create New Batch' and includes fields for 'Batch DOS' and 'Created Date', both set to '2023-07-10'. It also has a 'Provider Information' section with a 'Facility Name' dropdown menu. A 'Create Batch' button is visible at the bottom right of this section.
- Attach Case to Batch 24:** This section is titled 'Attach Case to Batch 24' and includes fields for 'Case DOS' and 'Created Date', both set to '2023-07-10'. It also has a 'Patient Information' section with fields for 'First Name', 'Middle Name', 'Last Name', 'Date of Birth', 'P-Status', 'ENCN', 'MRN', and 'Primary Insurance Company Name'.

On the right side of the interface, there is a 'Documents' section with a 'Complete Record' button and a 'Complete Record' document viewer showing a PDF document titled 'Request Health Records from HIM and/or Change Records'.

4.2. Move Case to Different Batch

To move a Case to a different batch, select the case in the Cases Pane and click the 'Edit' button. Select 'Move Case to Another Batch' and use the popup to select the correct batch.

NOTE: If no batch exists for the selected DOS, you can create a new batch from the popup.

Batches and Cases

ID	Facility Name	DOS	State	Total Cases
09	Manual	2023-03-14	New	02
08	Automated	2023-03-14	New	01
07	Scanned	2023-02-01	New	01
02	Scanned	2023-01-12	New	07
01	Manual	2023-01-12	New	02
03	Automated	2023-01-12	New	06
04	Scanned	2023-12-01	New	05
05	Scanned	2020-12-01	New	01

Showing 8 of 8 Batches

Case Details (5)

Case State: New | State Reason: OK | DOS: 2023-01-12 | Batch ID: 2 | P-Status: 3 | CMS Case Base Units: ---

Patient Name: PATIENT, JANE Q | Patient Sex: F | DoB (Age): 1993-01-02 (30) | ENCH | 9876543210 | MRN: 1234567890 | Anes Type: CSE | Diagnosis: --- | Procedure: NEURAXIAL LABOR ANALGESIA/ANESTHESIA | Primary Insurance: MOUNA MEDICAID HMO/MOUNA APPLE HEALTH WA

Documents

Facesheets

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Move Case to Another Batch

• Select a Batch DOS & Batch (if necessary) to move the Case
• The DOS for the Case will be updated to the Selected Batch DOS

Facility Name: Scanned | Batch DOS: 2023-01-12 | Select Batch: 2

☐ Allow Different Facility

Apply Changes

4.3. Create New Case

1. If a patient is missing, check the facility EMR to verify that a case exists for the patient on the DOS being reconciled. If a case is present, use the Attach Case to Batch Pane to append a new case. The batch indicator circled below can be used to verify that the correct batch is selected. Then, ensure that the appropriate values have been entered for DOS, Full Name (including LAST, FIRST formatting if desired), and Date of Birth have been entered and click "Create Case".

Hank Claim Maker | [Coder View](#) | [Admin View](#) | [Reconcile View](#) | [Data Entry View](#) | **Amy Noll** | Sales Demo 01 | [Reload](#)

Batches and Cases

Showing 8 of 8 Batches

ID	Facility Name	DOS	State	Total Cases
09	Manual	2023-03-14	New	02
08	Automated	2023-03-14	New	01
07	Scanned	2023-02-01	New	01
02	Scanned	2023-01-12	New	07
01	Manual	2023-01-12	New	02
03	Automated	2023-01-12	New	06
04	Scanned	2022-12-01	New	05
05	Scanned	2020-12-01	New	01

Create New Batch

Batch DOS: 2023-05-30 | Created Date: 2023-05-30

Provider Information

Facility Name:

[Create Batch](#) [Clear](#)

Documents 0

No Documents Attached

Attach Case to Batch 8

Case DOS: 2023-03-14 | Created Date: 2023-05-30

Patient Information

First Name: | Middle Name: | Last Name:

Date of Birth: | P-Status:

ENCN: | MRN:

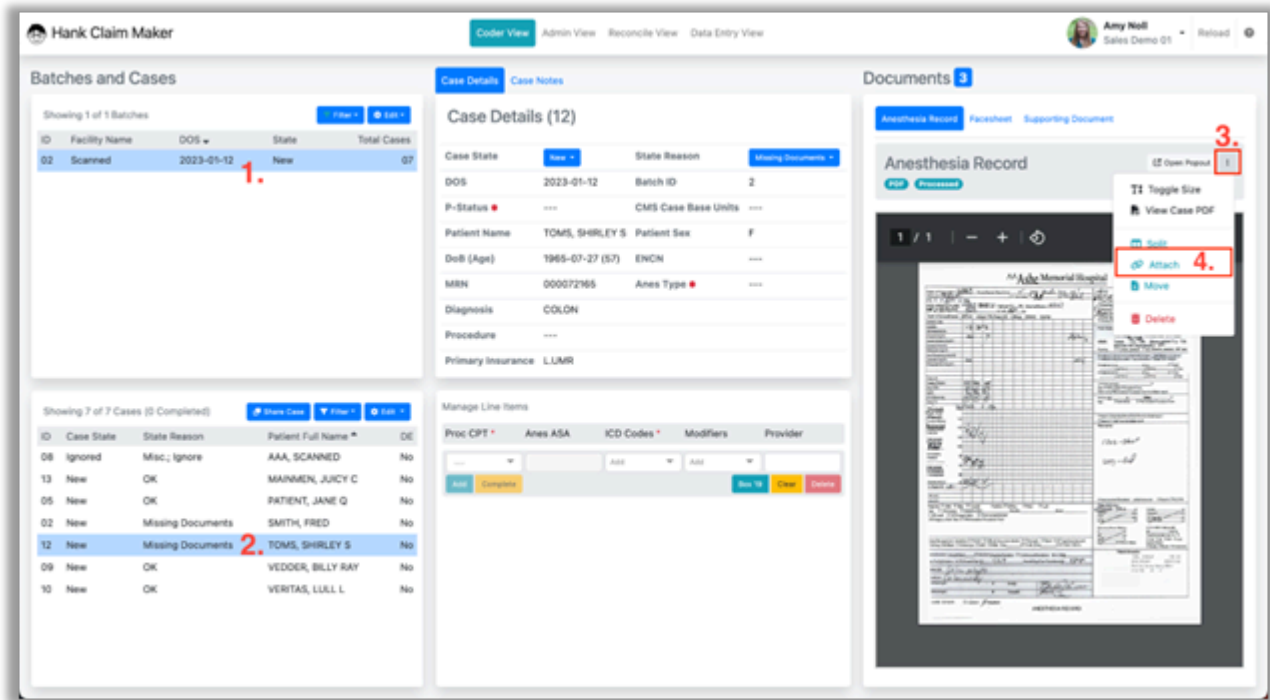
Primary Insurance Company Name:

Finally, follow the final two steps outlined in the 'Attach a Document' section (next topic) to complete the creation of the case.

5. Document Remediation

5.1. Attach a Document to a Case

1. Ensure that the appropriate batch and case are selected in the Batch Selection Pane [1] and Case Selection Pane [2] and then click the ... button [3] in the Document Pane. Select 'Attach' [4] from the list.



2. In the pop up, attach any required documents using the green attach buttons and submit them all at once with the final blue “Attach” command [3]. In the example below, an Op Note and an Anesthesia Postprocedure Evaluation were attached via the green buttons [1, 2]. IF you see the Blue Cloud icon (picture on right) simply drag your documents there so they will be automatically processed.

NOTE: All attachments must be in PDF format.

×

Attach Documents

Attach one or more documents by type.

Complete Record	Attach
Op Note 1.	Remove
Anesthesia Preprocedure Evaluation	Attach
Anesthesia Procedure Notes	Attach
Anesthesia Postprocedure Evaluation 2.	Remove
Facesheet	Attach
Supporting Document	Attach
Schedule	Attach
Scanned Document	Attach
Other	Attach


3. Attach All Cancel

×

Attach Documents

Attach a document to be processed

Processed documents will be for patient
ONE, TEST (DOS: 2023-06-13)



Attach one or more documents by type.

Complete Record	<button>Attach</button>
Op Note	<button>Attach</button>
Anesthesia Preprocedure Evaluation	<button>Attach</button>
Anesthesia Procedure Notes	<button>Attach</button>
Anesthesia Postprocedure Evaluation	<button>Attach</button>
Facesheet	<button>Attach</button>
Supporting Document	<button>Attach</button>
Schedule	<button>Attach</button>
Scanned Document	<button>Attach</button>
Other	<button>Attach</button>

Attach AllCancel

5.2. Split Pages from a Document

1. In the event that you need to move individual or groups of pages out of one document and to another case, use the Split Document feature.

Select the Action menu next to 'Open Popout' in the Document Pane and select 'Split Document'.

The screenshot displays the Hank Claim Maker interface. On the left, there are two tables: 'Batches and Cases' and 'Cases (0 Completed)'. The 'Batches and Cases' table lists various batches with columns for ID, Facility Name, DOS, State, and Total Cases. The 'Cases (0 Completed)' table lists individual cases with columns for ID, Case State, State Reason, Patient Full Name, DE, and Notes. The central pane shows 'Case Details (94)' for a patient named TOMS, SHIRLEY S, with fields for Case State, DOS, P-Status, Patient Name, DoB, MRN, Diagnosis, Procedure, and Primary Insurance. The right pane, titled 'Documents 3', shows an 'Anesthesia Record' document. A red box highlights the 'Open Popout' button, and a red arrow points to the 'Split' option in the dropdown menu that appears when the button is clicked. Other options in the menu include 'Toggle Size', 'View Case PDF', 'Attach', 'Move', and 'Delete'.

1. Select the pages to split

1. Find and select the case to transfer the pages to. If no case or batch exists- you can create these in the pop up.

1. Make sure to select 'Apply' before closing the Document Window.

5.3. Move Documents

To MOVE a single document in between cases, navigate to the case and make sure the document to move is selected. Then select the ... above the documents pane and select 'MOVE' from the menu.

NOTE: If no case exists for the documents, you can create a new case in the popup.

Batches and Cases

Showing 1 of 1 Batches

ID	Facility Name	DOS	State	Total Cases
02	Scanned	2023-01-12	New	07

Case Details (12)

Case State: New State Reason: Missing Documents

DOS: 2023-01-12 Batch ID: 2

P-Status: --- CMS Case Base Units: ---

Patient Name: TOMS, SHIRLEY S Patient Sex: F

DoB (Age): 1965-07-27 (57) ENCN

MRN: 000072165 Anes Type: ---

Diagnosis: COLON

Procedure: ---

Primary Insurance: LUMR

Documents 3

Anesthesia Record Facesheet Supporting Document

Anesthesia Record PDF Processed

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Open Popup

Toggle Size

View Case PDF

Split

Attach

Move

Delete

Batches and Cases

Showing 8 of 8 Batches

ID	Facility Name	DOS	State	Total Cases
09	Manual	2023-03-14	New	02
08	Automated	2023-03-14	New	01
07	Scanned	2023-02-01	New	01
02	Scanned	2023-01-12	New	07
01	Manual	2023-01-12	New	
03	Automated	2023-01-12	New	
04	Scanned	2022-12-01	New	
05	Scanned	2020-12-01	New	

Create New Batch

Batch DOS: 2023-05-30 Created Date: 2023-05-30

Provider Information

Facility Name: Scanned

Documents 5

Original 2 Summary 1 Unmatched 1 Summary 2 Unmatched 2

Original 2 PDF Processed

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Open Popup

Last Updated:

Move Current Document Another Case

Select a Batch DOS & Batch to move the Document(s)

Facility Name: Scanned Batch DOS: 2023-01-12 Select Batch: 2 Select Case: 8 - AAA, SCANNED - OR - Create Case

Allow Different Facility

After Document Move...

Do nothing

Set Source Case to Ignored / Duplicate

Delete Source Case

Move Current Document

To MOVE ALL documents- select the Case in the Cases Pane and select the 'Edit' button. Then select 'Move All Documents to Another Case.'

Hank Claim Maker

[Admin View](#)
[Reconcile View](#)
[Data Entry View](#)

Batches and Cases

Showing 8 of 8 Batches

ID	Facility Name	DOS	State	Total Cases
09	Manual	2023-03-14	New	02
08	Automated	2023-03-14	New	01
07	Scanned	2023-02-01	New	01
02	Scanned	2023-01-12	New	07
01	Manual	2023-01-12	New	02
03	Automated	2023-01-12	New	06
04	Scanned	2022-12-01	New	05
05	Scanned	2020-12-01	New	01

Showing 7 of 7 Cases (0 Completed)

ID	Case State	State Reason	Patient Full Name	DE	Notes
08	Ignored	Misc.; Ignore	AAA, SCANNED	No	---
13	New	OK	MAINMEN, JUICY C	No	---
05	New	OK	PATIENT, JANE Q	No	---
02	New	OK	SMITH, FRED	No	---
12	New	OK	TOMS, SHIRLEY S	No	BLOCK PROCEDURE DOCUMENT MISSING - reason- post op pain relief.
09	New	OK	VEDDER, BILLY RAY	No	---
10	New	OK	VERITAS, LULL L	No	---

Create New Batch

Batch DOS * Created Date *

2023-05-30 2023-05-30

Provider Information

Facility Name *

Create Batch Clear

Documents 4

Facesheet Facesheet 1 Supporting Document Original 1

[PDF](#) [Processed](#) Open Popout i Last Updated:

1 / 1 — + | ↺

Attach Case to Batch 2

+ Move Case to Another Batch ate *

+ Move All Documents to Another Case

Delete Case


First Name * Middle Name * Last Name *

Date of Birth * P-Status

ENCN MRN

Primary Insurance Company Name

Hank Claim Maker
Coder View Admin View **Reconcile View** Data Entry View


Amy Noll
 Sales Demo 01

Reload

Batches and Cases

Showing 8 of 8 Batches

ID	Facility Name	DOS	State	Total Cases
09	Manual	2023-03-14	New	02
08	Automated	2023-03-14	New	01
07	Scanned	2023-02-01	New	01
02	Scanned	2023-01-12	New	07
01	Manual	2023-01-12	New	---
03	Automated	2023-01-12	New	---
04	Scanned	2022-12-01	New	---
05	Scanned	2020-12-01	New	---

Showing 7 of 7 Cases (0 Completed)

ID	Case State	State Reason	Patient Full Name	DE	Notes
08	Ignored	Misc.; Ignore	AAA, SCANNED	No	---
13	New	OK	MAINMEN, JUICY C	No	---
05	New	OK	PATIENT, JANE Q	No	---
02	New	OK	SMITH, FRED	No	---

Create New Batch

Batch DOS: Created Date:

Provider Information

Facility Name:

Documents 4

Facesheet Facesheet 1 Supporting Document Original 1

Facesheet

PDF Processed

Last Updated:

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Move All Documents Another Case

- Select a Batch DOS & Batch to move the Document(s)

Facility Name	Batch DOS	Select Batch	Select Case	- OR -	Create Case
Scanned	2023-01-12	2	13 - MAINMEN, JUICY C		

☐ Allow Different Facility

After Document Move... ☒ Do nothing
☐ Set Source Case to Ignored / Duplicate
☐ Delete Source Case

Move All Documents

Patient Information

First Name	Middle Name	Last Name

5.4. Delete a Document

To MOVE a single document in between cases, navigate to the case and make sure the document to move is selected. Then select the ... above the documents pane and select 'MOVE' from the menu.

NOTE: If no case exists for the documents, you can create a new case in the popup.

The screenshot displays the Hank Claim Maker application interface. The top navigation bar includes tabs for 'Delete a Document - Hank.ai', 'Media Manager - Manula.com', 'CM User Guides - Google Drive', 'Manula Images - Google Drive', 'Claim Maker User Guide - Google', and 'Hank Claim Maker'. The main interface is divided into three primary sections:

- Batches and Cases:** A table showing 8 batches. The selected batch (ID 02) is highlighted in blue. Below this, a table shows 7 cases (0 Completed). Case 13 is selected.
- Case Details (13):** A form displaying case information such as Case State (New), DOS (2023-01-12), Batch ID (2), Patient Name (MAINMEN, JUICY C), Patient Sex (M), DoB (Age) (1961-03-29 (62)), MRN (000028604), Anes Type (Anesthesia), Diagnosis (EGD POSS DILATION/COLON), Procedure (---), and Primary Insurance (1. MEDICARE PART B).
- Documents 4:** A pane showing a document titled 'Facesheet'. A context menu is open over the document, with the 'Delete' option highlighted in red. Other options include 'Open Report', 'Toggle Size', 'View Case PDF', 'Split', 'Attach', and 'Move'.

The 'Delete' option in the context menu is the target of the action described in the text.

6. Billing System Data Entry View

7. Support Information
