

Practice EHR | User Guide

Billing Module | Part 2



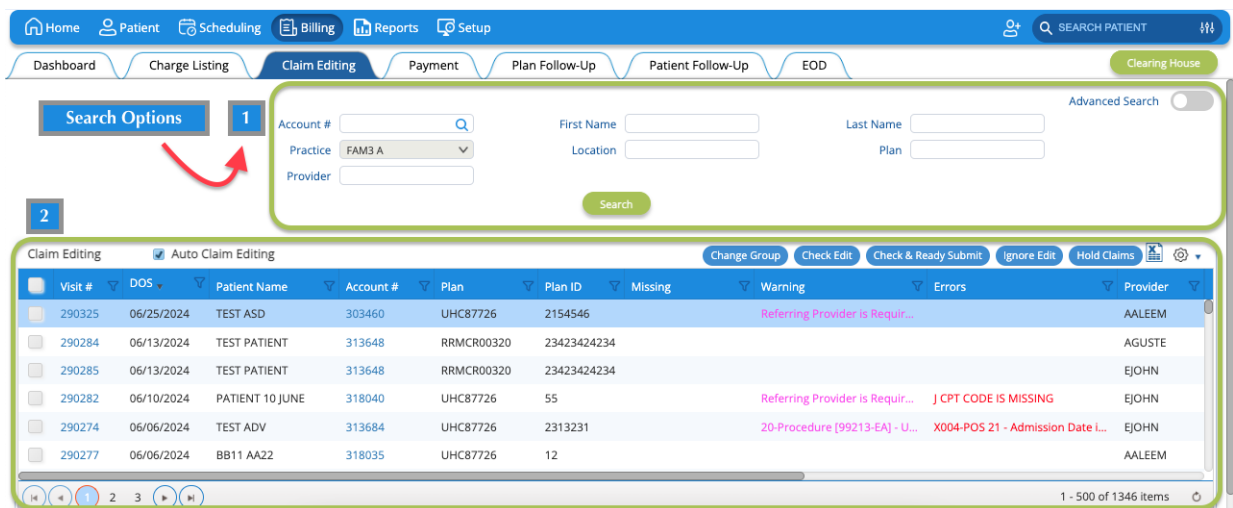
Billing Module

The Billing module deals with the claim submission and follow-up processes that are essential to a medical practice's financial health. The user can access the Billing module to submit or review any pending claims and follow up with the patient or the plan if necessary.

Here, we explain the various tabs of the Billing module.

1. Claim Editing

The Claim Editing tab of the Billing module consists of those claims that require edits and subsequent submission.



The screenshot displays the 'Claim Editing' tab in the Billing module. At the top, there is a navigation bar with tabs for Dashboard, Charge Listing, Claim Editing (active), Payment, Plan Follow-Up, Patient Follow-Up, and EOD. A search bar is visible in the top right corner. Below the navigation bar, there is a search options box with a '1' in a blue box and a red arrow pointing to it. The search options box contains fields for Account #, Practice (FAM3 A), Provider, First Name, Location, Last Name, and Plan. A 'Search' button is located below these fields. Below the search options box, there is a table of claims with a '2' in a blue box pointing to it. The table has columns for Visit #, DOS, Patient Name, Account #, Plan, Plan ID, Missing, Warning, Errors, and Provider. The table contains several rows of claim data, including warnings and errors.

Visit #	DOS	Patient Name	Account #	Plan	Plan ID	Missing	Warning	Errors	Provider
290325	06/25/2024	TEST ASD	303460	UHC87726	2154546		Referring Provider is Requir...		AALEEM
290284	06/13/2024	TEST PATIENT	313648	RRMCR00320	23423424234				AGUSTE
290285	06/13/2024	TEST PATIENT	313648	RRMCR00320	23423424234				EJOHN
290282	06/10/2024	PATIENT 10 JUNE	318040	UHC87726	55		Referring Provider is Requir...	J CPT CODE IS MISSING	EJOHN
290274	06/06/2024	TEST ADV	313684	UHC87726	2313231		20-Procedure [99213-EA] - U...	X004-POS 21 - Admission Date L...	EJOHN
290277	06/06/2024	BB11 AA22	318035	UHC87726	12				AALEEM

1.1. Search Option

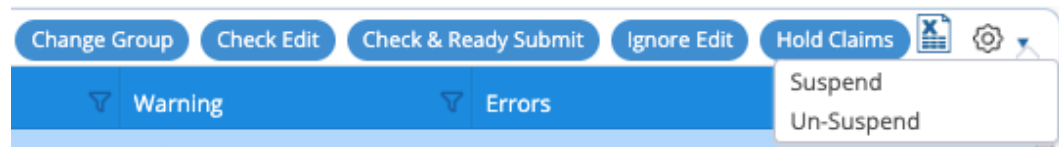
The Search option can be used to filter and search for claims that require edits. The user can also check the "Advance Search" box to search for results via plan type, claim type, and entry details.



1.2. Claim Editing List

This section will enlist all the claims that require editing and resubmission. The warnings and errors are stated in purple and red colors, respectively, against each claim.

There are various options at the top left corner of this section, which can be used to take specific actions.

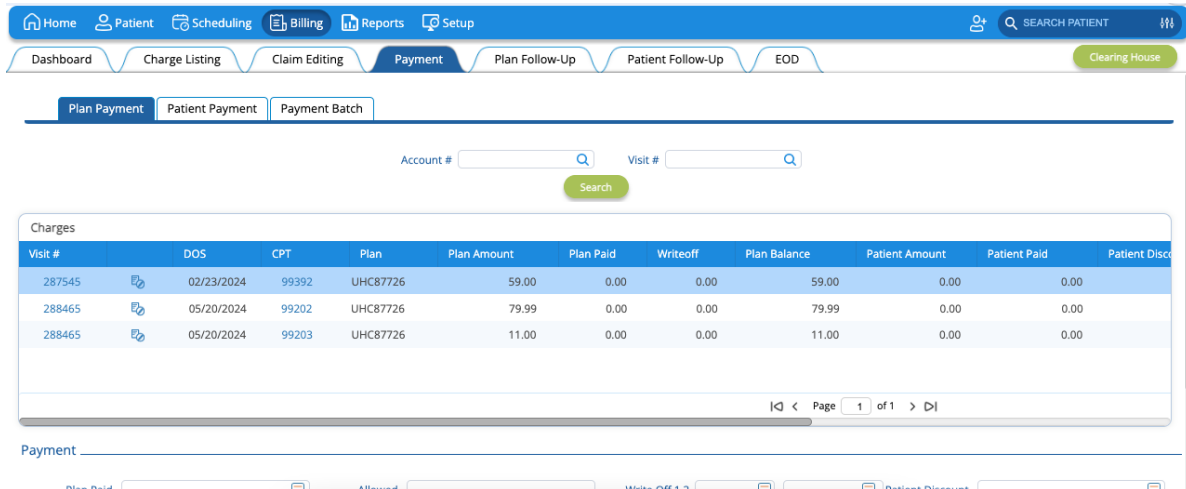


- The user can edit the claim by clicking the visit number, which will open the claim details. Once the changes are made, the user can click **“Update Visit”** to save the changes. After that, the user can click **“Check Edit”** to see if the error(s) has been resolved.
- The user can also resubmit the edited claim by clicking **“Check and Ready Submit.”**
- The user can remove a claim editing task from the queue by clicking **“Ignore Edit.”** However, this action will only work if the claim contains no errors or warnings.
- The **“Hold Claim”** option allows the user to put the claim on hold. Simply select the claim intended to be put on hold and click **“Hold Claim.”** Assign the provider and plan and click **“Save.”**
- The gear icon allows the user to **“Suspend”** or **“Unsuspend”** the visit for which the claim has been generated.



2. Payment

The Payment tab of the Billing module allows the user to take different actions regarding plan and patient payments.



The screenshot shows the 'Payment' tab in the Billing module. At the top, there are navigation tabs: Home, Patient, Scheduling, Billing, Reports, and Setup. Below these are sub-tabs: Dashboard, Charge Listing, Claim Editing, Payment (selected), Plan Follow-Up, Patient Follow-Up, and EOD. A 'Clearing House' button is visible on the right. Under the 'Payment' sub-tab, there are three buttons: Plan Payment, Patient Payment, and Payment Batch. Below these are search fields for 'Account #' and 'Visit #' with a 'Search' button. The main area displays a 'Charges' table with the following data:

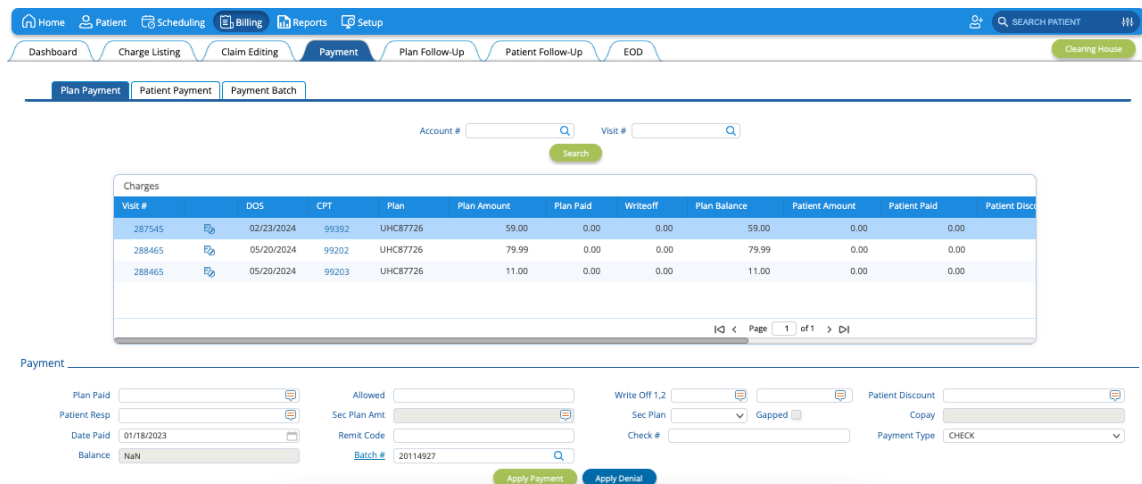
Visit #	DOS	CPT	Plan	Plan Amount	Plan Paid	Writeoff	Plan Balance	Patient Amount	Patient Paid	Patient Disc
287545	02/23/2024	99392	UHC87726	59.00	0.00	0.00	59.00	0.00	0.00	0.00
288465	05/20/2024	99202	UHC87726	79.99	0.00	0.00	79.99	0.00	0.00	0.00
288465	05/20/2024	99203	UHC87726	11.00	0.00	0.00	11.00	0.00	0.00	0.00

Below the table is a pagination control showing 'Page 1 of 1'. At the bottom, there are input fields for 'Plan Paid', 'Allowed', 'Write Off 1,2', and 'Patient Discount'.

There are two ways to apply for a plan payment:

1. Plan Payment

The user can apply for a single claim payment from the insurance using this method.



This screenshot shows the 'Apply Payment' form in the 'Payment' tab. It includes the same 'Charges' table as the previous screenshot. Below the table, there are several input fields for payment details:

- Plan Paid:
- Patient Resp:
- Date Paid: 01/18/2023
- Balance: NaN
- Allowed:
- Sec Plan Amt:
- Remit Code:
- Batch #: 20114927
- Write Off 1,2:
- Sec Plan: Gapped
- Check #:
- Patient Discount:
- Copay:
- Payment Type: CHECK

At the bottom, there are two buttons: 'Apply Payment' and 'Apply Denial'.

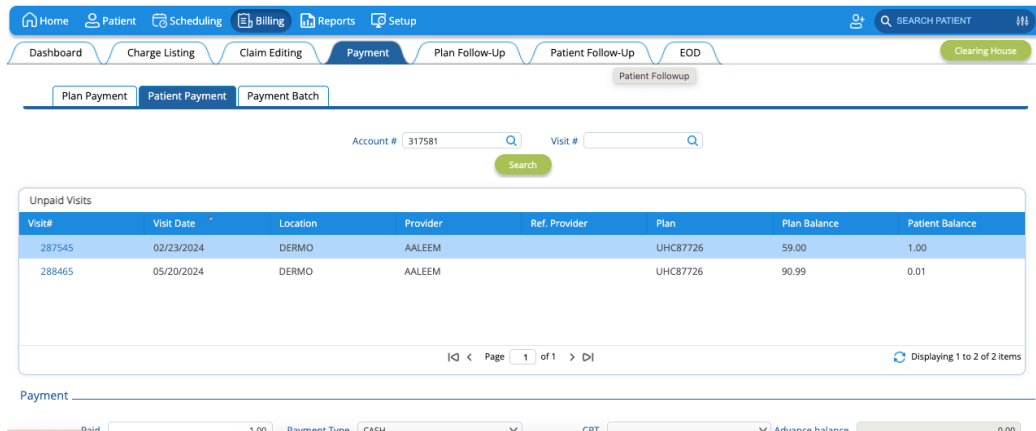
To apply for a single plan payment, follow these steps:



- Select the patient using their account or visit number. You can also search for the patient using their name by clicking the **magnifying glass icon** against the **“Account #”** slot.
- Once the patient is selected, their account number will automatically populate in the **“Account #”** slot. Click **“Search.”**
- A list of patient visits will appear on your screen. Select the visit against which the plan payment is intended to be submitted.
- Enter the necessary details, like plain paid amount, write-off amount, payment type, etc., and click **“Apply Payment.”**
- You can also apply denial by clicking **“Apply Denial.”** However, this process will require the remit code.

2. Patient Payment

The user can submit a payment against the amount charged to the patient.



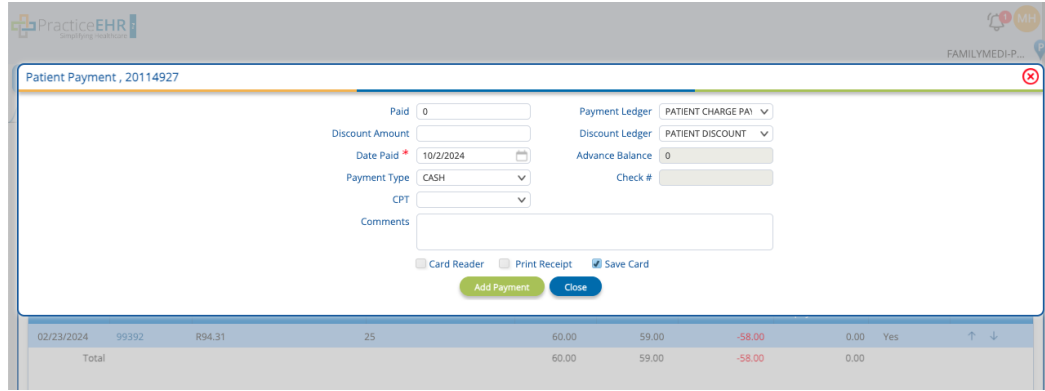
Visit#	Visit Date	Location	Provider	Ref. Provider	Plan	Plan Balance	Patient Balance
287545	02/23/2024	DERMO	AALEEM		UHC87726	59.00	1.00
288465	05/20/2024	DERMO	AALEEM		UHC87726	90.99	0.01

To submit a patient payment, follow these steps:

- Select the patient using their account or visit number. You can also search for the patient using their name by clicking the **magnifying glass icon** against the **“Account #”** slot.
- Once the patient is selected, their account number will automatically populate in the **“Account #”** slot. Click **“Search.”**



- A list of patient visits will appear on your screen. Select the visit against which the patient payment is intended to be submitted.
- Click **"Patient Payment."**



Patient Payment, 20114927

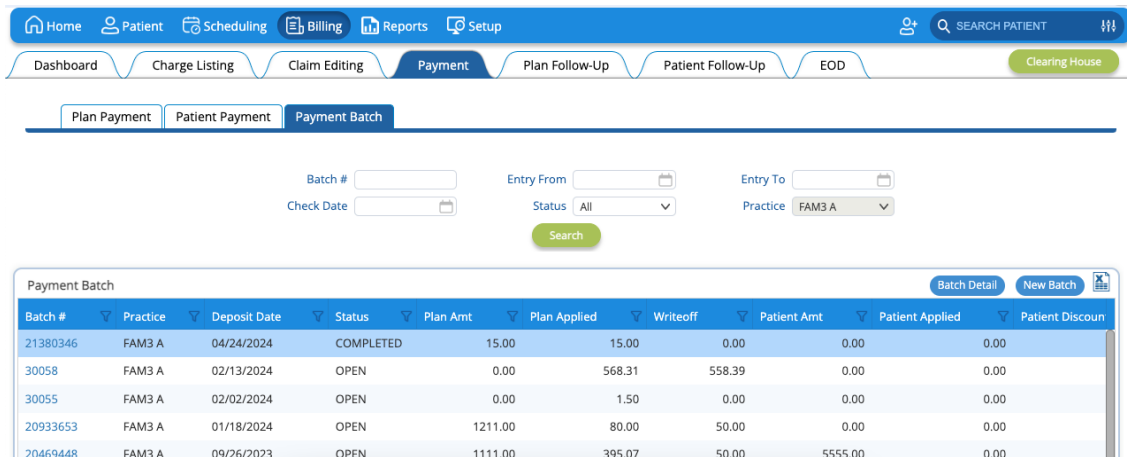
Paid: 0
 Discount Amount:
 Date Paid: 10/2/2024
 Payment Type: CASH
 CPT:
 Comments:
 Payment Ledger: PATIENT CHARGE PAI
 Discount Ledger: PATIENT DISCOUNT
 Advance Balance: 0
 Check #:
 Card Reader Print Receipt Save Card

02/23/2024	99392	R94.31	25	60.00	59.00	-58.00	0.00	Yes	↑ ↓
Total				60.00	59.00	-58.00	0.00		

- Enter the paid amount in the **"Paid"** box, and select the date of payment using the **"Date Paid"** option.
- Click **"Add Payment."**

3. Payment Batch

The payment batch option allows the user to apply for multiple claim payments.



Home Patient Scheduling Billing Reports Setup SEARCH PATIENT

Dashboard Charge Listing Claim Editing **Payment** Plan Follow-Up Patient Follow-Up EOD Clearing House

Plan Payment Patient Payment **Payment Batch**

Batch #: Entry From: Entry To:
 Check Date: Status: All Practice: FAM3 A

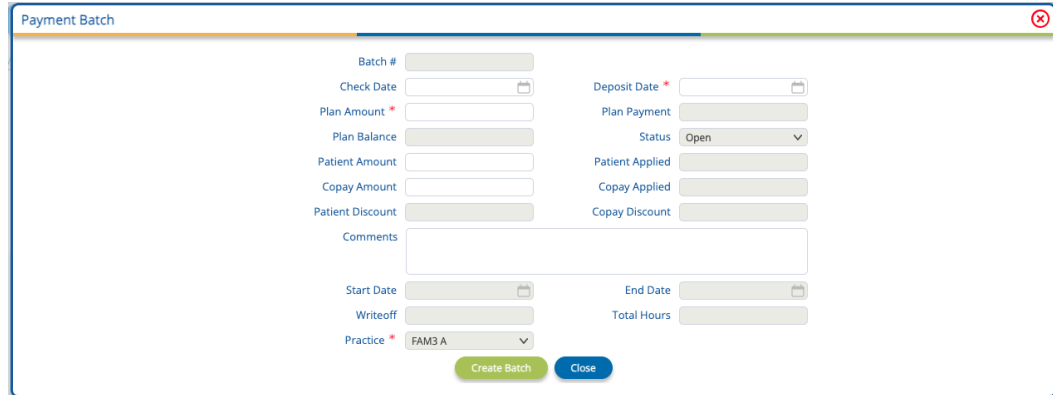
Batch #	Practice	Deposit Date	Status	Plan Amt	Plan Applied	Writeoff	Patient Amt	Patient Applied	Patient Discoun
21380346	FAM3 A	04/24/2024	COMPLETED	15.00	15.00	0.00	0.00	0.00	0.00
30058	FAM3 A	02/13/2024	OPEN	0.00	568.31	558.39	0.00	0.00	0.00
30055	FAM3 A	02/02/2024	OPEN	0.00	1.50	0.00	0.00	0.00	0.00
20933653	FAM3 A	01/18/2024	OPEN	1211.00	80.00	50.00	0.00	0.00	0.00
20469448	FAM3 A	09/26/2023	OPEN	1111.00	395.07	50.00	5555.00	0.00	0.00

To create a batch payment, follow these steps:

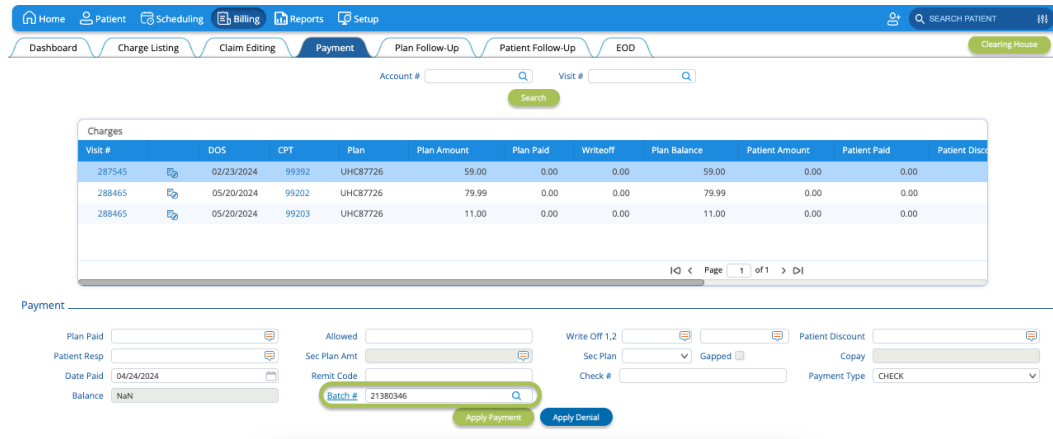
- Go to the **"Payment Batch"** section of the Plan Payment tab.



- Click **"New Batch."**



- Enter the available information in the respective slots.
- Click **"Create Batch."**
- A **batch number** will automatically be assigned to the newly created payment batch.
- Go to the **"Plan Payment"** section of the Plan Payment tab.
- Create multiple claim payments using the batch number.



Visit #	DOS	CPT	Plan	Plan Amount	Plan Paid	Writeoff	Plan Balance	Patient Amount	Patient Paid	Patient Disc
287545	02/23/2024	99392	UHC87726	59.00	0.00	0.00	59.00	0.00	0.00	0.00
288465	05/20/2024	99202	UHC87726	79.99	0.00	0.00	79.99	0.00	0.00	0.00
288465	05/20/2024	99203	UHC87726	11.00	0.00	0.00	11.00	0.00	0.00	0.00