Practice EHR | User Guide

Billing Module | Part 2

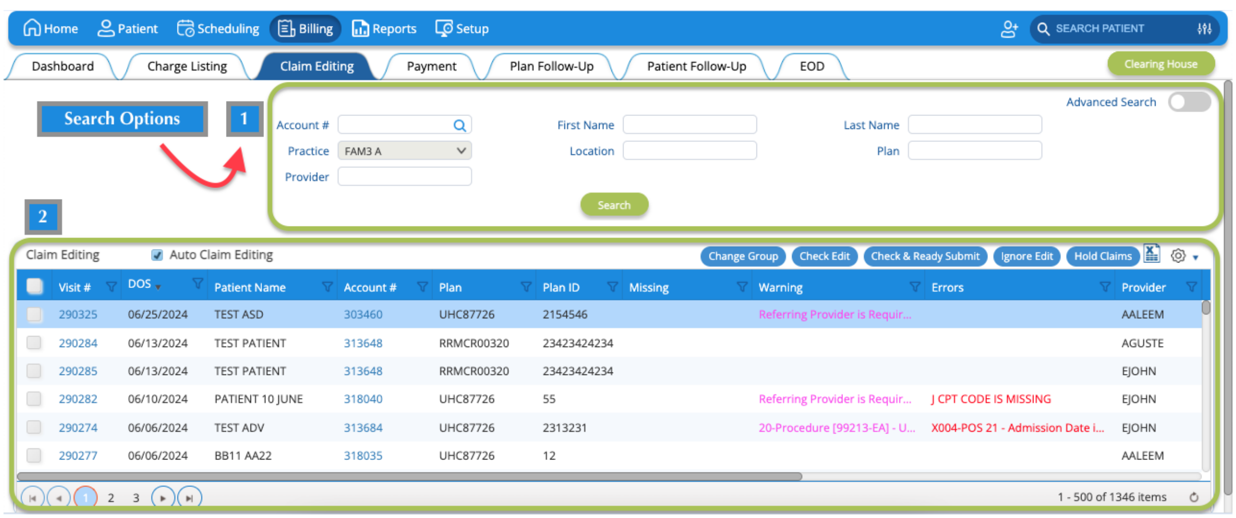
Billing Module

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.



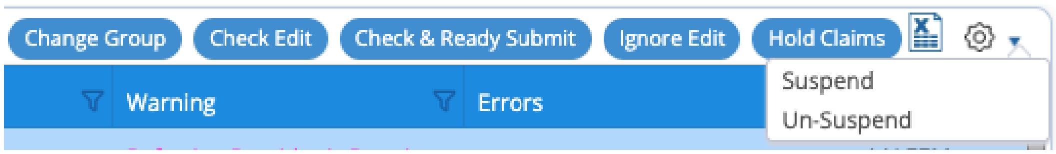
1.1. Search Option

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.

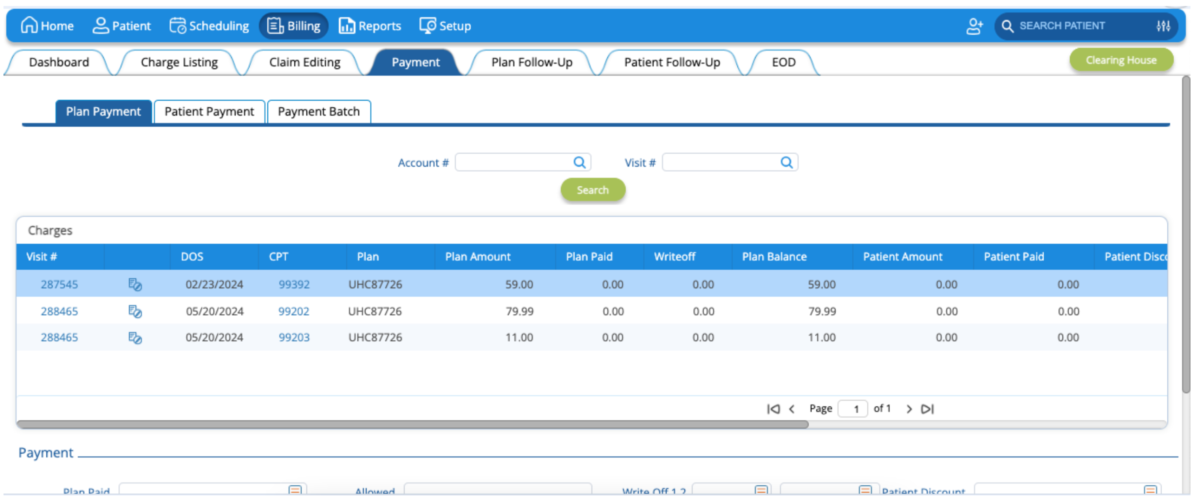
There are various options at the top left corner of this section, which can be used to take specific actions.



- 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

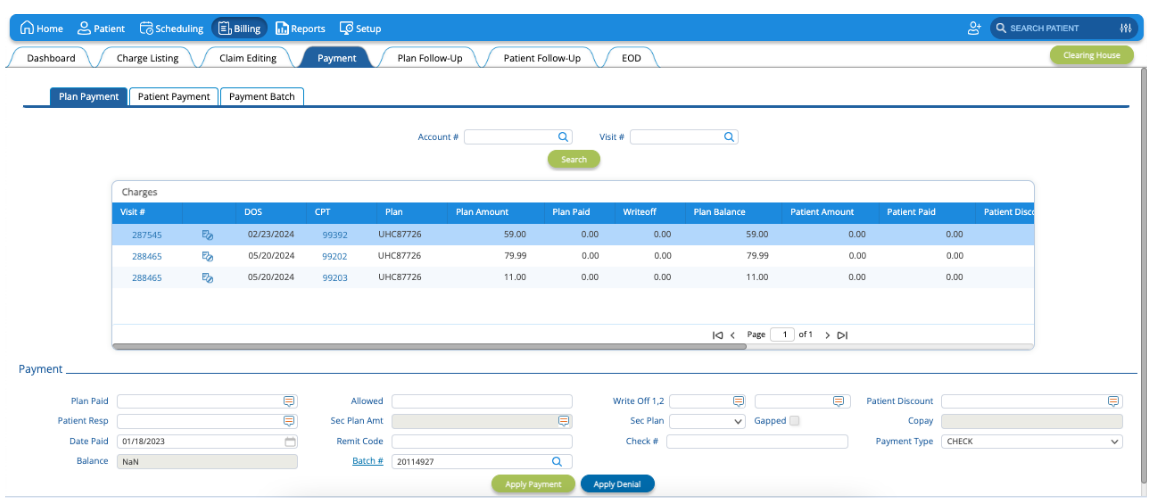
The Payment tab of the Billing module allows the user to take different actions regarding plan and patient payments.



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.

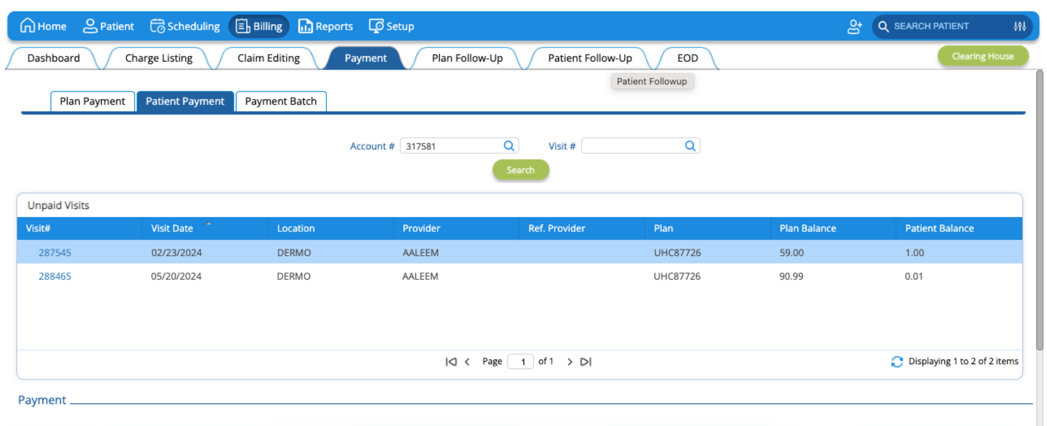


To apply for a single plan payment, follow these steps:

- 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

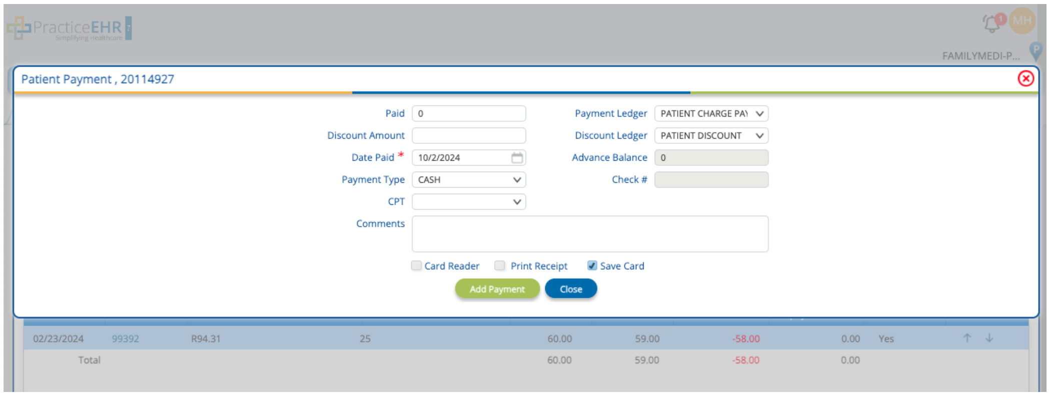
The user can submit a payment against the amount charged to the patient.



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**."

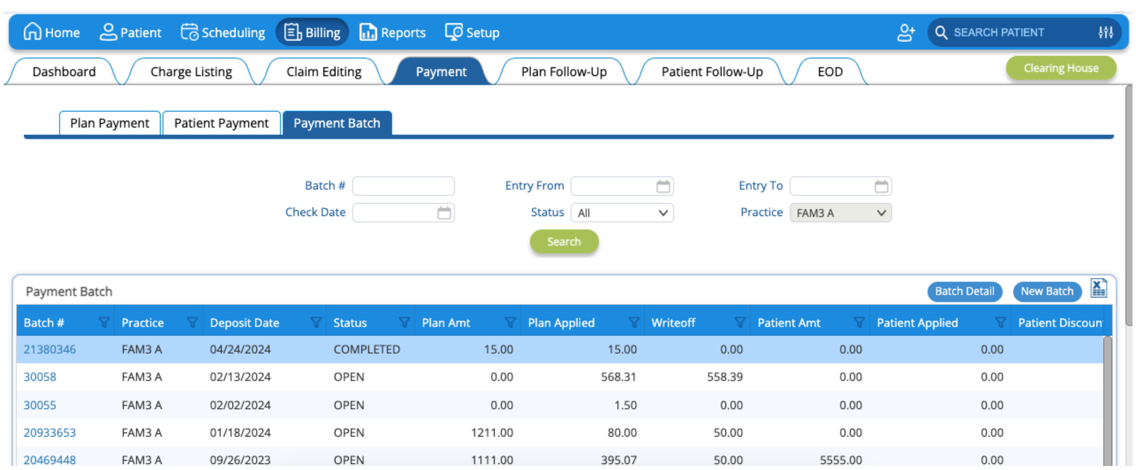
- A list of patient visits will appear on your screen. Select the visit against which the patient payment is intended to be submitted.
- Click "**Patient Payment**."



- 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

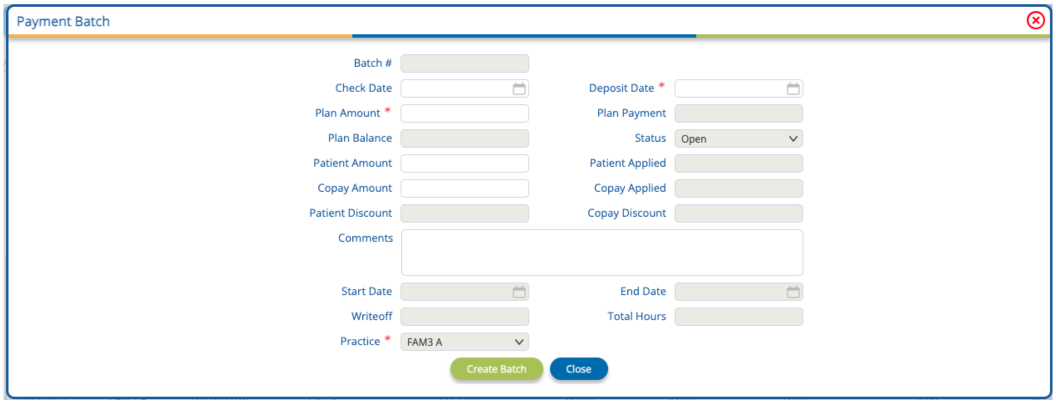
The payment batch option allows the user to apply for multiple claim payments.



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.