

# Practice EHR | User Guide

## Billing Module | Part 3



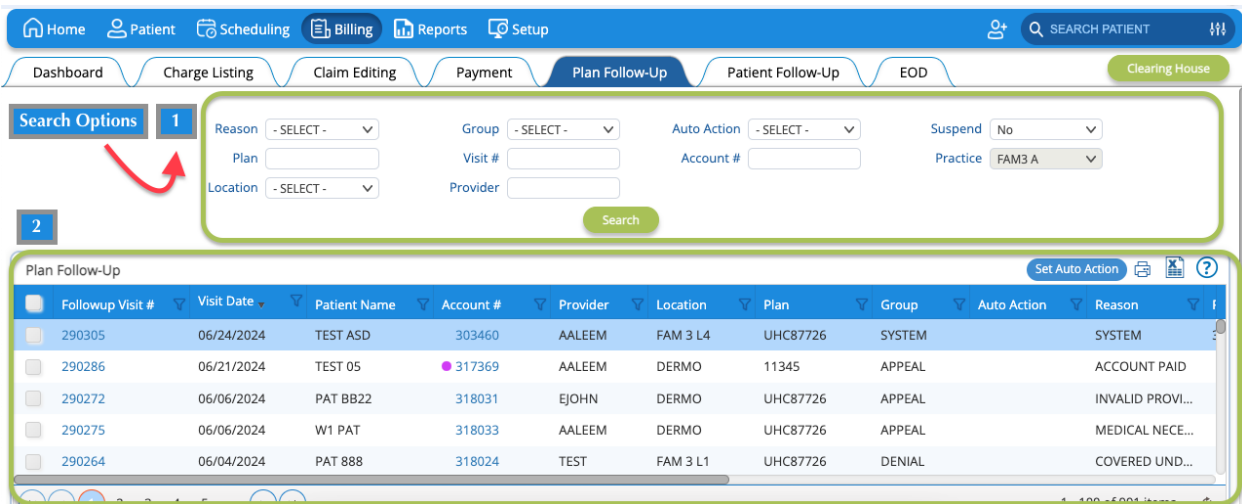
# Billing Module

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. Plan Follow-Up

The Plan Follow-Up tab within the Billing module provides a list of claims with outstanding insurance balances that are over 30 days old and the claims that may have been denied, underpaid, or processed incorrectly.



The screenshot displays the 'Plan Follow-Up' tab in the Billing module. At the top, there is a navigation bar with tabs for Dashboard, Charge Listing, Claim Editing, Payment, Plan Follow-Up (active), Patient Follow-Up, and EOD. Below the navigation bar is a search options section with a 'Search Options' button (labeled '1') and a 'Search' button. The search options include dropdown menus for Reason, Group, Auto Action, Location, and Suspend, and text input fields for Plan, Visit #, Account #, and Provider. Below the search options is a table titled 'Plan Follow-Up' with columns for Followup Visit #, Visit Date, Patient Name, Account #, Provider, Location, Plan, Group, Auto Action, and Reason. The table contains several rows of claim data.

Followup Visit #	Visit Date	Patient Name	Account #	Provider	Location	Plan	Group	Auto Action	Reason
290305	06/24/2024	TEST ASD	303460	AALEEM	FAM 3 L4	UHC87726	SYSTEM		SYSTEM
290286	06/21/2024	TEST 05	317369	AALEEM	DERMO	11345	APPEAL		ACCOUNT PAID
290272	06/06/2024	PAT BB22	318031	EJOHN	DERMO	UHC87726	APPEAL		INVALID PROVI...
290275	06/06/2024	W1 PAT	318033	AALEEM	DERMO	UHC87726	APPEAL		MEDICAL NECE...
290264	06/04/2024	PAT 888	318024	TEST	FAM 3 L1	UHC87726	DENIAL		COVERED UND...

### 1.1. Search Option

The search option can be used to filter the results based on the assigned reason, assigned group, plan, visit number, or account number. To display all the claims in the plan follow-up bucket, the user can leave all the slots empty and click "Search."



## 1.2. Plan Follow-Up List

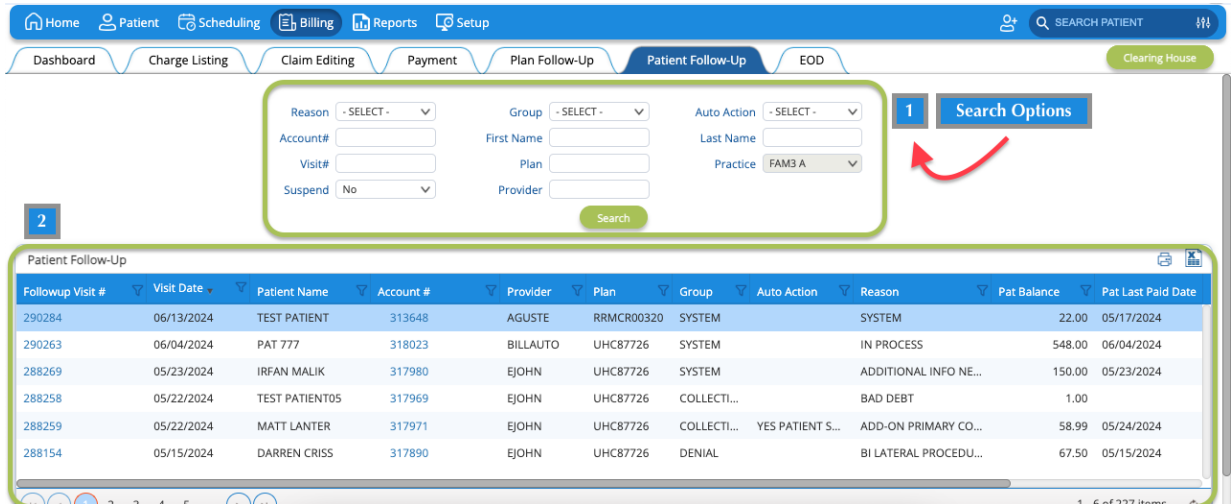
Once the search is performed, a list of claims will appear at the bottom of the screen, just below the search section. Click the **Followup Visit #** to view the follow-up detail window.

- The “**Detail**” section can be used to view the plan follow-up details, update the plan follow-up status, or add follow-up notes on any calls made on the claim.
- The “**Claim Status**” section can be accessed to view the electronic claim status.
- The “**Elect EOB**” section can be used to view the electronic EOB receipt.
- The follow-up claim history can be viewed through the “**History**” section of the follow-up details window.



## 2. Patient Follow-Up

The Patient Follow-Up tab within the Billing module of Practice EHR enlists the claims with outstanding patient balances that are more than 30 days old.



Followup Visit #	Visit Date	Patient Name	Account #	Provider	Plan	Group	Auto Action	Reason	Pat Balance	Pat Last Paid Date
290284	06/13/2024	TEST PATIENT	313648	AGUSTE	RRMCR00320	SYSTEM		SYSTEM	22.00	05/17/2024
290263	06/04/2024	PAT 777	318023	BILLAUTO	UHC87726	SYSTEM		IN PROCESS	548.00	06/04/2024
288269	05/23/2024	IRFAN MALIK	317980	EJOHN	UHC87726	SYSTEM		ADDITIONAL INFO NE...	150.00	05/23/2024
288258	05/22/2024	TEST PATIENT05	317969	EJOHN	UHC87726	COLLECTI...		BAD DEBT	1.00	
288259	05/22/2024	MATT LANTER	317971	EJOHN	UHC87726	COLLECTI...	YES PATIENT S...	ADD-ON PRIMARY CO...	58.99	05/24/2024
288154	05/15/2024	DARREN CRISS	317890	EJOHN	UHC87726	DENIAL		BI LATERAL PROCEDU...	67.50	05/15/2024

### 2.1. Search Option

The search option can be used to filter the results based on the patient's name, assigned reason, assigned group, account number, visit number, plan, or provider. To display all the claims in the patient follow-up bucket, the user can leave all the slots empty and click "Search."

### 2.2. Patient Follow-Up List

Once the search is performed, a list of claims that require follow-ups with the patients. Click the **Followup Visit #** to view the follow-up detail window.



Followup Visit # 290284, Visit Date 06/13/2024, # of times in Followup 1, Total Followup Age 84

Reason \* SYSTEM    Group \* SYSTEM    Auto Action

Tickle Date 01/01/1900

Additional Info

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Provider AGUSTE    Location OFICEPLANO    Visit # 290284  
 Plan PALMETTO GBA - RI    Plan Short Name RRMCR00320    Plan Tel  
 Plan ID 23423424234    Patient Balance 22.00    Fee 62.00  
 Insured Name TEST PATIENT    Patient Name TEST PATIENT    Patient DOB 12/21/1985  
 Tax ID 898717283    Provider NPI 1346358249    Statement Date

Update    View Submit    Call    Advance Eligibility    Close

- The “**Detail**” section can be used to view the patient follow-up details, update the patient follow-up status, or add follow-up notes on any calls made on the claim.
- The “**Elect EOB**” section can be used to view the electronic EOB receipt.
- The “**All Visits**” section will enlist the patient’s visits pending in the patient follow-up bucket.
- The follow-up claim history can be viewed through the “**History**” section of the follow-up details window.