Practice EHR | User Guide

Billing Module | Part 3

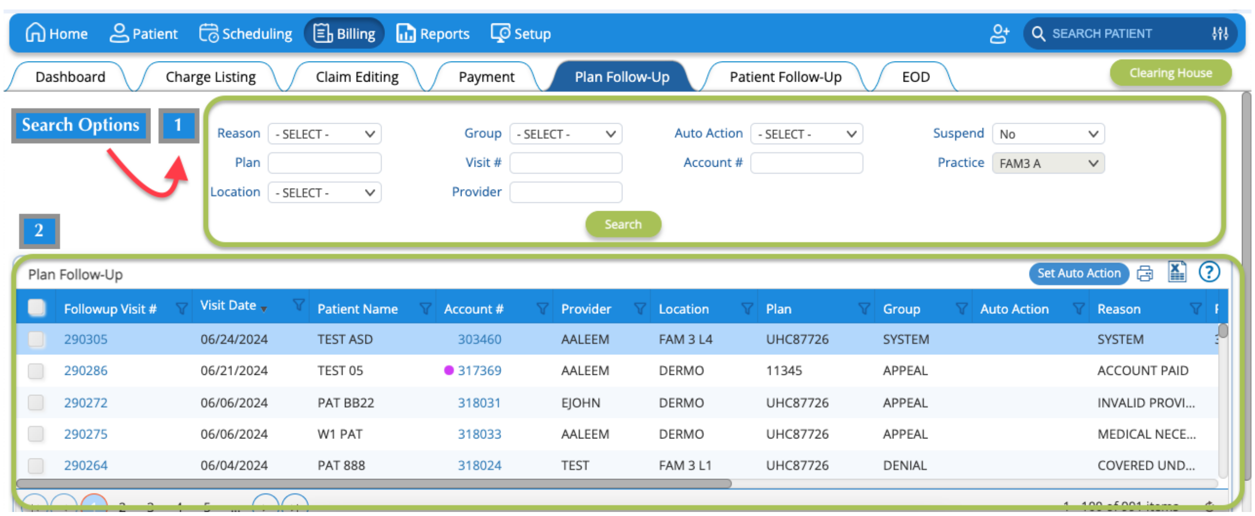
Billing Module

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.

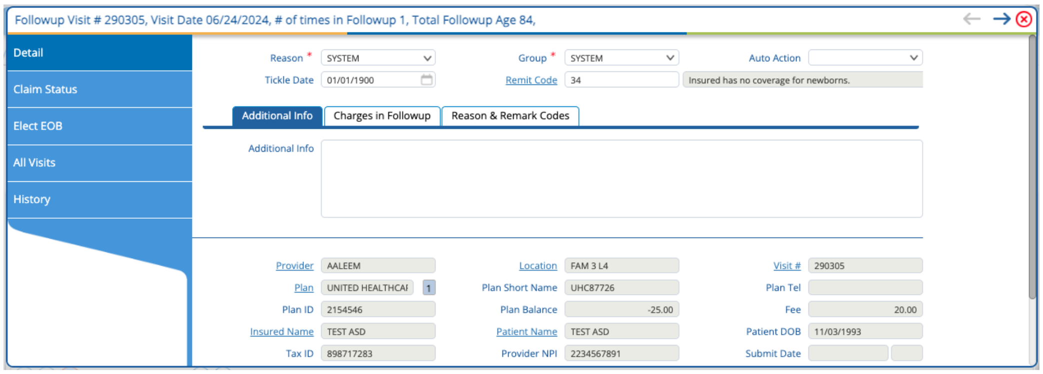


1.1. Search Option

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

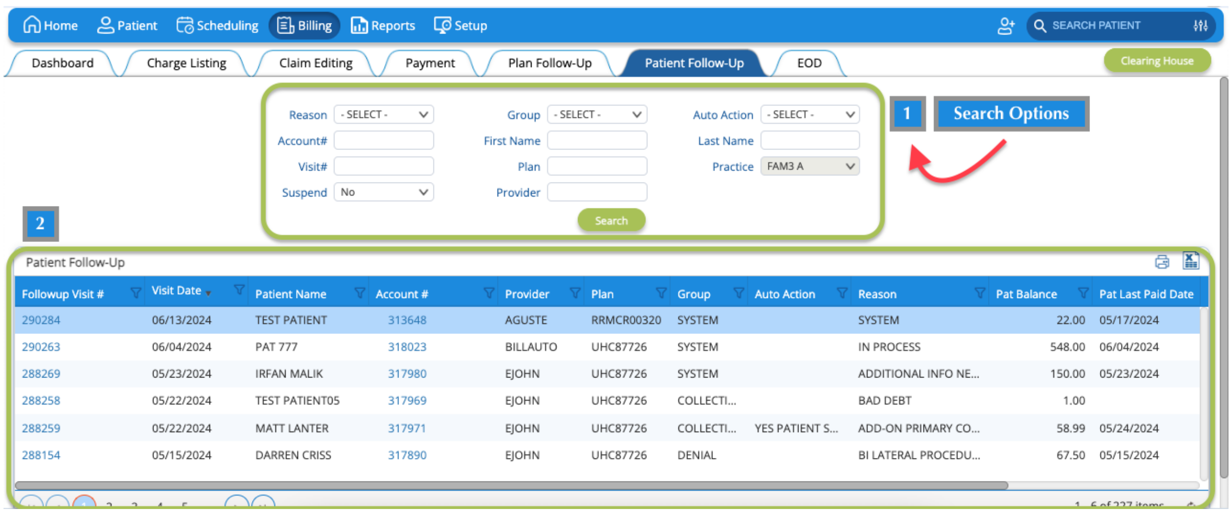
Once the search is performed, a list of claims will appear at the bottom of the screen, just below the search section. Click the **Followup Visit #** to view the follow-up detail window.



- 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.

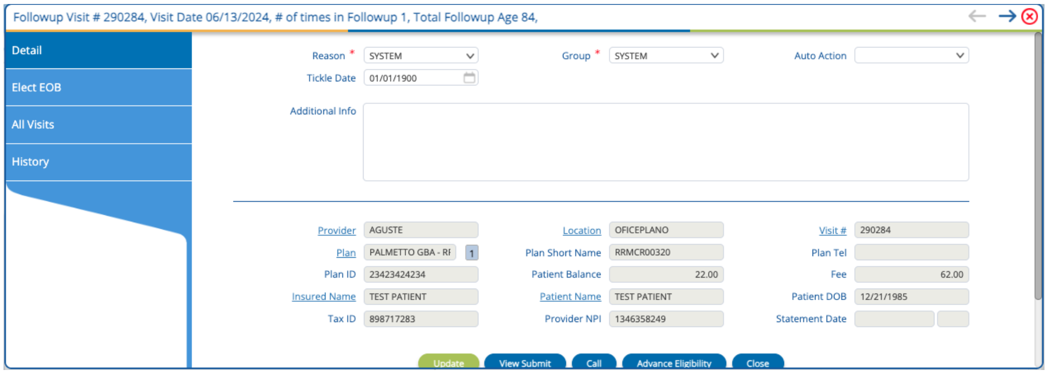


2.1. Search Option

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.



- 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.

