# PCC 2013
# Users' Conference

## Strategies for Insurance and Personal Collections



## Ins & Pers Collections

- Pre Visit
- Visit Date
- Post Visit

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## Ins & Pers Collections
### Pre-Visit

The processes used *prior* to when a patient comes in will impact the quality of your claims, increase TOS payments, and help reduce the amount of collections needed.

In short the Front End functions drive the revenue cycle.

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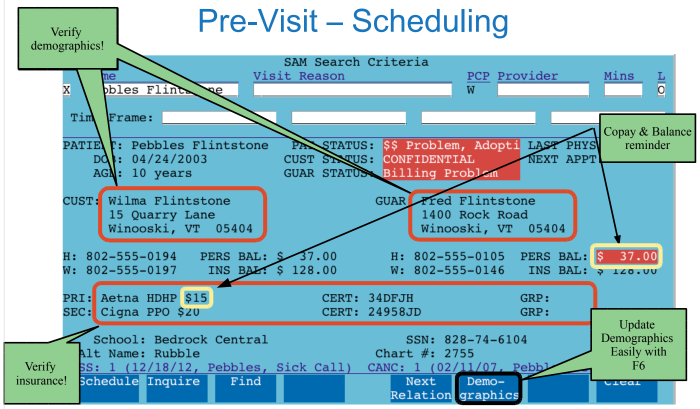
# Ins & Pers Collections
## Pre-Visit

- Scheduling
- Appointment Verification
- Eligibility Verification
- Eligibility Using Partner
- Billing Department Prep



# Ins & Pers Collections
## Pre-Visit – Scheduling






# Ins & Pers Collections
## Pre-Visit – Scheduling

- New Patient Process
  - Who collects insurance information over the phone?
    - Pros / Cons
  - F7 can be configured to bring you directly to the policy program
  - Remind them to bring their insurance card and copay

## Ins & Pers Collections
### Pre-Visit – Scheduling

- Points to make during appointment verification
  - Verify date, time, and visit reason
  - Verify insurance plan, subscriber, start date, and end date
  - Remind patient
    - to bring in their insurance card
    - expected copay
    - outstanding balances



## Ins & Pers Collections
### Pre-Visit – Appointment Verification

- Why?
  - Avoid gaps in your schedule
- When?
  - 24 – 48 hours prior to the appointment
- How?
  - notify program
  - srs reports
  - 3rd party software

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## Ins & Pers Collections
### Pre-Visit – Appointment Verification

- What to verify during reminder calls
  - Date, time and visit reason
  - Insurance plan, subscriber, start/end dates
  - Reminders:
    - Bring insurance card
    - Expected copay
    - Outstanding balances

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## Ins & Pers Collections
### Pre-Visit – Eligibility Verification

- Why?
  - Primary Error for EDI Rejections
    - REJECTED AT CLEARINGHOUSE: SUBSCRIBER PRIMARY IDENTIFICATION NUMBERS IS MISSING OR INVALID
- When?
  - 1 – 2 days prior to the appointment



## Ins & Pers Collections
### Pre-Visit – Eligibility Verification

- How?
  - Phone
  - Internet
  - Partner's Eligibility Program

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## Ins & Pers Collections
### Pre-Visit – Eligibility Verification

- Partner's elig program
  - Auto eligibility overnight
    - 48 hours prior to visit
    - 24 hours prior to visit
    - Update policy information as needed through elig
    - Use notes for the front desk to see at checkin

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## Ins & Pers Collections
### Pre-Visit – Eligibility Verification

- Partner's elig program
  - Eligibility for visits more than two days away
    - Why? How?
    - Pros/Cons



## Ins & Pers Collections
### Pre-Visit – Billing Dept Prep

- Develop a financial policy you share with parents.
- Develop guides to educate patients about insurance responsibility
- Understand basic information about patient insurance plans

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## Ins & Pers Collections
### Same Day Visits

- Scheduling
  - Verify: demographics, insurance, copay, personal balance
  - Reminders: bring insurance card, expected copay, previous personal balance
- Eligibility
  - Real time with elig if possible
  - Check online/via phone as needed

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# Ins & Pers Collections
## Day of Visit

- Patient Check In (checkin)
- Posting Charges (checkout)
- Clean claims



# Ins & Pers Collections
## Day of Visit - checkin

- Why?
  - Most Common Clearinghouse Claim Rejection Reasons can be avoided by properly using the checkin program
    - Update demographics
    - Check eligibility
    - Insurance verification
  - TOS payments (copay/previous balance)

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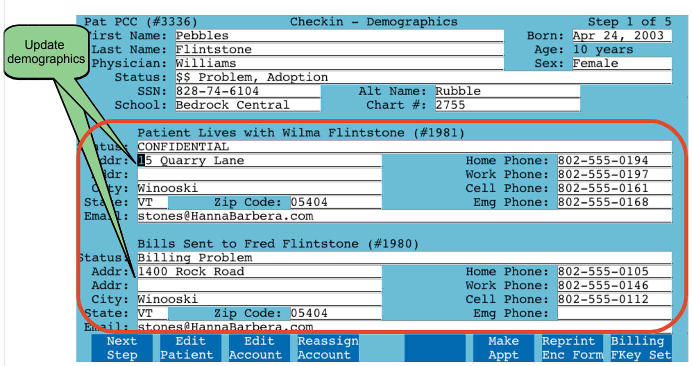
# Ins & Pers Collections
## Day of Visit – checkin Demographics

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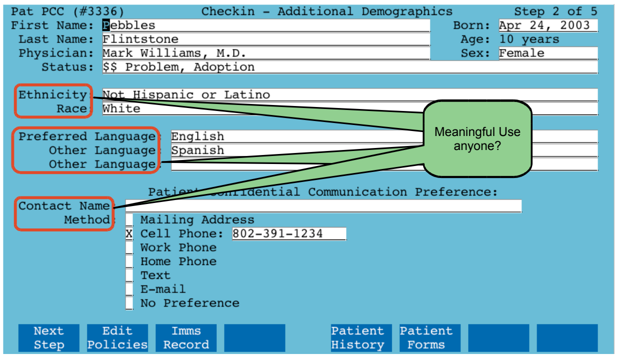
# Ins & Pers Collections

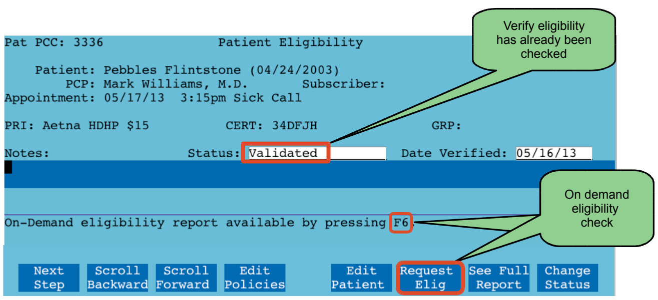
## Day of Visit – checkin Demographics






# Ins & Pers Collections

## Day of Visit – checkin Eligibility



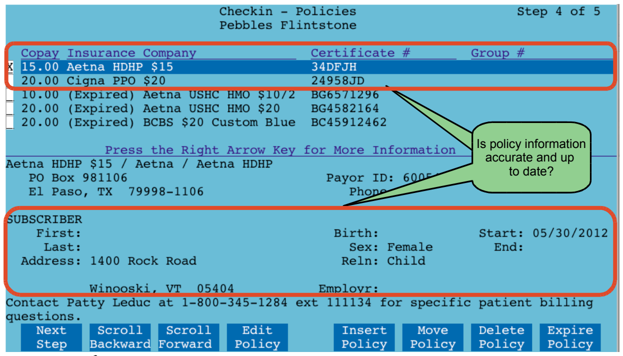



# Ins & Pers Collections

## Day of Visit – checkin Eligibility

- Make sure eligibility has been verified
- Relationship code for child or self
  - Online eligibility systems do not ask for patient relationship to subscriber. Real time eligibility requires this be correct of the insurance will not return a response.

# Ins & Pers Collections
## Day of Visit – checkin Policies



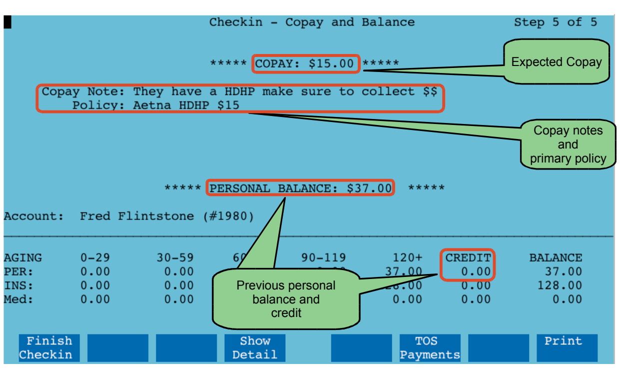



# Ins & Pers Collections
## Day of Visit – checkin Policies

- Always get a copy of their insurance card
  - Make this part of your financial policy
  - Create a sign at checkin
  - Verify Signature on File form is in the chart
- Verify subscriber information
  - Policy ID
  - Correct relationship



# Ins & Pers Collections
## Day of Visit – checkin Copays



# Ins & Pers Collections

## Day of Visit – checkin Copays

- Does the parent want to know why they have a balance?

F4 Show Details gives you this:

Finish Checkin | Show Detail | TOS Payments | Print

| OUTSTANDING CHARGES: | PRIMARY DIAG | PROV | AMOUNT | PERS DUE | INS DUE |
|---|---|---|---|---|---|
| 05/01/12 Flintstone, Pebbles Well Child 5-11 yrs | V20.2 | Case | 95.00 | 7.00 | 0.00 |
| 12/20/12 Flintstone, Dino OV Expanded Focus | 372.30 | Davi | 79.00 | 15.00 | 64.00 |
| 12/20/12 Flintstone, Pebbles OV Expanded Focus | 372.30 | Davi | 79.00 | 15.00 | 64.00 |
| TOTAL AMOUNT DUE | | | | 37.00 | 128.00 |



# Ins & Pers Collections

## Day of Visit – checkin Copays

- Make sure to collect the proper copay amount, sick vs. well
- HSA Accounts
  - Keeping credit card on file to use after EOBs are received
- Credits appear as a – instead of a CR as part of the balance



# Ins & Pers Collections

## Day of Visit – checkout

- Proper insurance configuration
- checkout screens pre-set by visit reason
- SNAP codes
- Clean claims
- Account for all visits

## Ins & Pers Collections
### Day of Visit – checkout Insurance Config

- Proper insurance configuration
  - Pending correct procedures
  - Submitting correct procedures
    - Why pending and submitting are not the same
  - Different copays for well vs. sick codes
  - Support can help you fix any of these not working properly.
    - Call and ask for Jim!



## Ins & Pers Collections
### Day of Visit – checkout Screens

- checkout screens
  - Setup using Charge Screen Editor (csedit)
  - Can vary by visit reason, place of service, and/or provider

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## Ins & Pers Collections
### Day of Visit – checkout SNAP codes

- SNAP Code Table
  - Use for so procedures are not missed, ie. Immunizations
  - Each SNAP code can link up to 21 procedures, each capable of linking to 4 diagnoses codes
  - Can be placed on screens using the Charge Screen Editor (csedit)

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## Ins & Pers Collections
### Day of Visit – checkout Clean Claims

- Always link diagnoses to procedures
- Certified coder on staff
  - Close to providers for questions
- Train staff on basic coding scenarios
  - Improve your revenue
  - Reduce your rejection rate
- Use SNAP codes to reduce missed procedures



## Ins & Pers Collections
### Day of Visit – checkout Clean Claims

- Verifying quality claims
  - Daysheet Postings Check (dailycheck)
    - Use interactive mode
    - Who should use dailycheck?
  - Changing insurance after charges are posted means:
    - Updating the insurance in policy and oops
    - Batching the claim with the correct insurance
- Pre-authorization / Referral requirements



## Ins & Pers Collections
### Post Visit

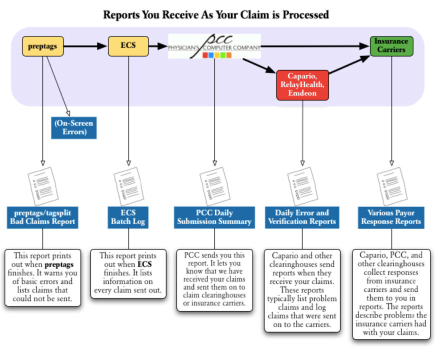
- Insurance Collections
- Personal Collections

## Insurance Collections
### Post Visit

- Claims submission
- Posting payments / responses
- Claims follow up
- Claim submission tools and reports



## Insurance Collections
### Post Visit – Claim Submission

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## Insurance Collections
### Post Visit – Claims Submission

- preptags
  - Bad Claims Report
    - Result from basic validation errors
    - Missing subscriber identifier, provider NPI
    - List claims not submitted by Partner
- Sample preptags Bad Claim Report Error

```
Date: 07/16/12  PCC #: 12345    Patient: Bart Simpson
        Guar PCC#: 54321        Cus PCC#: 54321
        Claim is for an insurance company no longer on the patient
        Charge filed with: UNITED HEALTHCARE BOX 740800 $20
```

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# Insurance Collections
## Post Visit – Claim Submission

- Partner Claim Responses
  - ECS Batch Logs
    - Lists claims (date of service, total claim charge, patient name) submitted by Partner to a specific payor on a specific date

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# Insurance Collections
## Post Visit – Claim Submission

- Clearinghouse/Intermediary Responses
  - Delivered via clearinghouse or gateway
    - PCC Daily Submission Summary
    - Capario Daily Verification Report, etc
  - Rejected claims are not submitted to payors
  - Accepted claims are submitted to payors

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# Insurance Collections
## Post Visit – Claim Submission

- Finding Electronic Claim Responses in Partner
  - Correct Mistakes (oops)
    - Use to access account/patient specific claim and response history
  - EDI Reports (ecsreports)
    - Use to access original/complete response reports by type and date

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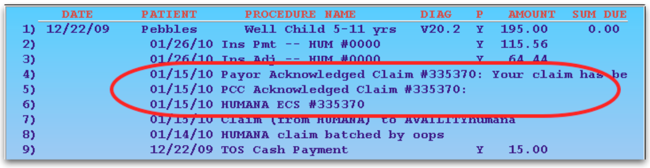
# Insurance Collections

## Post Visit – Follow Up Claim Submission Tools

Electronic Claim Responses in Correct Mistakes (oops)



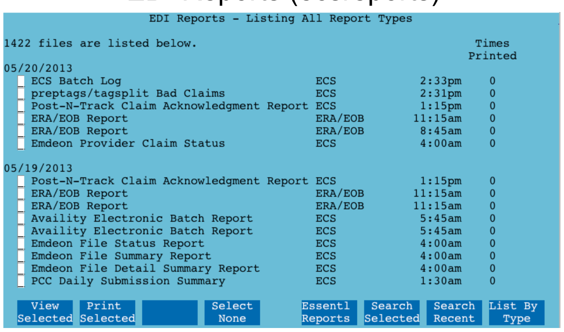

Use the <F4> Insurance Status function key to access the claim responses (e.g. lines 4, 5, and 6)




# Insurance Collections

## Post Visit – Claim Submission

EDI Reports (ecsreports)






# Insurance Collections

## Post Visit – Claim Submission

- To learn  more about EDI reports attend Justin's Electronic Claims Submission Reporting class on **Friday at 10:30am**!

## Insurance Collections
### Post Visit – Payment Posting

- Autoposting of payments
  - ERA vs EFT
  - autopip
  - RARC and CARC
  - erareports



## Insurance Collections
### Post Visit – Payment Posting autopip

**What's ERA?**

- Electronic Remittance Advice
- an Electronic EOB

**What's EFT?**

- Electronic Funds Transfer
- aka Direct Deposit



## Insurance Collections
### Post Visit – Payment Posting autopip

- ERA is not EFT
  - Most payors allow receipt of either or both
  - Some payors require both
  - Partner doesn't facilitate processing of EFT
    - That's between the payor and your bank!

# Insurance Collections

## Post Visit – Payment Posting autopip

- Sample ERA

Payer
NEVADA SUPERIOR HEALTH
P.O. BOX 182223

LAS VEGAS NV, 374227223

Payee
PAULI G LAGERS MD
# 112
222 UNIVERSITY W BLVD
SILVER SPRING MO, 209011969

Payment Information
Remittance Information Only
Check 871450137
Amount: $132.64

Adjustment Reason Key

45 Charge exceeds fee schedule/maximum allowable or contracted/legislated fee arrangement. (Use Group Codes PR or CO depending upon liability).

| Date CPT | Charge | Deduct | Copay/ CoInsur | Personal Other | Total PersDue | Contractual Adjust | Other Adjust | Payment |
|---|---|---|---|---|---|---|---|---|
| **SONGER, KATHY (Ins ID: U30999999)** | | | **PCC ID: 15710 123303** | | | | **Claim Processed as Primary** | |
| 121807 99392 | 148.00 | -10.00 | 0.00 | 0.00 | 10.00 | -47.35 45 | 0.00 | 90.65 |
| 121807 90655 | 30.00 | 0.00 | 0.00 | 0.00 | 0.00 | -14.03 45 | 0.00 | 15.97 |
| 121807 36416 | 20.00 | 0.00 | 0.00 | 0.00 | 0.00 | -15.77 45 | 0.00 | 4.23 |
| 121807 90465 | 35.00 | 0.00 | 0.00 | 0.00 | 0.00 | -13.21 45 | 0.00 | 21.79 |
| | 233.00 | -10.00 | 0.00 | 0.00 | 10.00 | -90.36 | 0.00 | 132.64 |



# Insurance Collections

## Post Visit – Payment Posting autopip

- How does ERA benefit you?
  - Standardization of presentation format/layout
    - **<u>All</u>** payors must use the HIPAA standard format and codesets, e.g. adjustment reasons
  - ERA is generally delivered more quickly than a paper/mailed EOB
  - ERA is required for automatic payment posting

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# Insurance Collections

## Post Visit – Payment Posting autopip

- **autopip** is Partner's automatic insurance payment posting program
  - Why are you not using this program?
    - 50% of our you are not
- autopip works in conjunction with pip
  - Yes, you'll still need to post some payments the old fashioned way

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# Insurance Collections

## Post Visit – Payment Posting autopip

- Learning to use autopip
  - autopip and the autoposting process is documented at
    http://learn.pcc.com/
  - Our video tutorial is highly recommended!
    http://downloads.pcc.com/videos/autopost.htm



# Insurance Collections

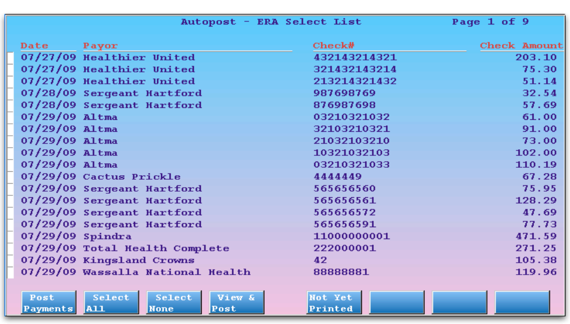
## Post Visit – Payment Posting autopip

- Unposted ERA payments are presented by payment date, payor, check number, and check amount



# Insurance Collections

## Post Visit – Payment Posting autopip



Autopost - ERA Select List Page 1 of 9

| Date | Payor | Check# | Check Amount |
|---|---|---|---|
| 07/27/09 | Healthier United | 432143214321 | 203.10 |
| 07/27/09 | Healthier United | 321432143214 | 75.30 |
| 07/27/09 | Healthier United | 213214321432 | 51.14 |
| 07/28/09 | Sergeant Hartford | 987698769 | 32.54 |
| 07/28/09 | Sergeant Hartford | 876987698 | 57.69 |
| 07/29/09 | Altma | 03210321032 | 61.00 |
| 07/29/09 | Altma | 32103210321 | 91.00 |
| 07/29/09 | Altma | 21032103210 | 73.00 |
| 07/29/09 | Altma | 10321032103 | 102.00 |
| 07/29/09 | Altma | 03210321033 | 110.19 |
| 07/29/09 | Cactus Prickle | 4444449 | 67.28 |
| 07/29/09 | Sergeant Hartford | 565656560 | 75.95 |
| 07/29/09 | Sergeant Hartford | 565656561 | 128.29 |
| 07/29/09 | Sergeant Hartford | 565656572 | 47.69 |
| 07/29/09 | Sergeant Hartford | 565656591 | 77.73 |
| 07/29/09 | Spindra | 11000000001 | 471.59 |
| 07/29/09 | Total Health Complete | 222000001 | 271.25 |
| 07/29/09 | Kingsland Crowns | 42 | 105.38 |
| 07/29/09 | Wassalla National Health | 88888881 | 119.96 |

Post Payments | Select All | Select None | View & Post | Not Yet Printed

# Insurance Collections
## Post Visit – Payment Posting autopip

- Partner autoposting in a nutshell
  - autopip posts the claim payments it can
  - Claim payments which are not autoposted are directed to the Manual Post Report
  - Print the Manual Post Report and post those payments with pip, i.e. the old fashioned way



# Insurance Collections
## Post Visit – Payment Posting autopip

- Use a different default payment/adjustment type than pip to make auto postings easier to see in Partner programs
  - Payment Types table
  - ced option

```
System Files                                              Page 29 of 30
                          Charge / Payment Posting

                          AUTOPIP CONFIGURATION
114. What is the default payment type for autopip?  This will override
     PIP_DEFPMT is filled in.
        Auto Ins Pmt

115. What is the default adjustment type for autopip?  This will override
     PIP_DEFADJ is filled in.
        Auto Ins Adj
```

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# Insurance Collections
## Post Visit – Payment Posting autopip

- Which payments and adjustments must be manually posted?
  - Those for which the charge amount, CPT, and/or copay doesn't match Partner's data
  - Those which don't relate directly to charges with unpaid insurance balances
  - Denials

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## Insurance Collections
### Post Visit – Payment Posting autopip

- Which payments and adjustments must be manually posted?
  - Depending on your Partner configuration
    - Adjustment codes which are not predefined as acceptable for autoposting
    - Payments which do not match the corresponding Partner allowable value



## Insurance Collections
### Post Visit – Payment Posting autopip

- Remittance Advice Remark Code (RARC) and Claims Adjustment Reason Code (CARC) Values
  - HIPAA standardized the coding payors use to identify adjustment reasons
  - All payors must use the standard code values in electronic remittance advice
  - Partner's formatted ERA translates the codes to the corresponding text descriptions



## Insurance Collections
### Post Visit – Payment Posting autopip

- Remittance Advice Remark Code (RARC) and Claims Adjustment Reason Code (CARC) Values
  - RARC Values
    http://www.wpc-edi.com/reference/codelists/healthcare/remittance-advice-remark-codes/
  - CARC Values
    http://www.wpc-edi.com/reference/codelists/healthcare/claim-adjustment-reason-codes/

# Insurance Collections

## Post Visit – Payment Posting autopip

- erareports
  - erareports provides access to archived ERA data separated by check, like autopip
  - All ERA – autoposted, manually posted, and unposted – is presented, separated by payment date, payor, check number, and check amount
  - Search and print functions are provided



# Insurance Collections

## Post Visit – Payment Posting autopip

- How do I get started with autoposting?
  1. Register to receive ERA from Partner's supported payors at http://www.pedsource.com/ERA/
  2. PCC's EDI Support Team will respond and assist with ERA payor registration as applicable
  3. Preview the http://learn.pcc.com/ online documentation for Partner ERA and autoposting

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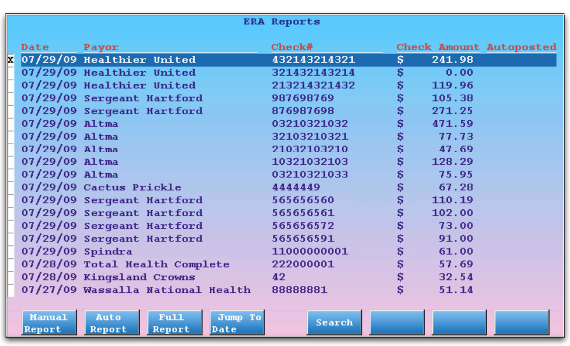
# Insurance Collections

## Post Visit – Payment Posting erareports



ERA Reports

| | Date | Payor | Check# | Check Amount | Autoposted |
|---|---|---|---|---|---|
| x | 07/29/09 | Healthier United | 432143214321 | $ 241.98 | |
| | 07/29/09 | Healthier United | 321432143214 | $ 0.00 | |
| | 07/29/09 | Healthier United | 213214321432 | $ 119.96 | |
| | 07/29/09 | Sergeant Hartford | 987698769 | $ 105.38 | |
| | 07/29/09 | Sergeant Hartford | 876987698 | $ 271.25 | |
| | 07/29/09 | Altma | 03210321032 | $ 471.59 | |
| | 07/29/09 | Altma | 32103210321 | $ 77.73 | |
| | 07/29/09 | Altma | 21032103210 | $ 47.69 | |
| | 07/29/09 | Altma | 10321032103 | $ 128.29 | |
| | 07/29/09 | Altma | 03210321033 | $ 75.95 | |
| | 07/29/09 | Cactus Prickle | 4444449 | $ 67.28 | |
| | 07/29/09 | Sergeant Hartford | 565656560 | $ 110.19 | |
| | 07/29/09 | Sergeant Hartford | 565656561 | $ 102.00 | |
| | 07/29/09 | Sergeant Hartford | 565656572 | $ 73.00 | |
| | 07/29/09 | Sergeant Hartford | 565656591 | $ 91.00 | |
| | 07/29/09 | Spindra | 11000000001 | $ 61.00 | |
| | 07/28/09 | Total Health Complete | 222000001 | $ 57.69 | |
| | 07/28/09 | Kingsland Crowns | 42 | $ 32.54 | |
| | 07/27/09 | Wassalla National Health | 88888881 | $ 51.14 | |



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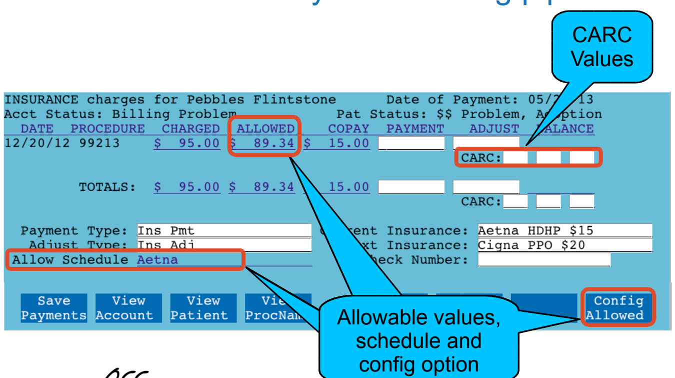
# Insurance Collections
## Post Visit – Payment Posting pip

- Posting insurance payments manually, aka pip
  - Payment/Adjustment types to track denials
  - CARC fields can be configured to appear
    - Using  allows secondary claims to be submitted electronically
      - Post ALL CARC codes!
  - Insurance Allowables / Fee Schedules
    - Instant comparison
    - Configuration on the fly



# Insurance Collections
## Post Visit – Payment Posting pip

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# Insurance Collections
## Post Visit – Corrections

- oops and oopsp
  - Correct insurance <F4>
  - Correct diagnoses <F5>
  - Correct billing provider <F5>
  - Batch corrected claims <F2>
  - Unlink/Relink payments <F6>

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# Insurance Collections
## Post Visit – Follow Up

- Unpaid claims
- Denial management
- Appeals process
- Partner claims submission tools and reports



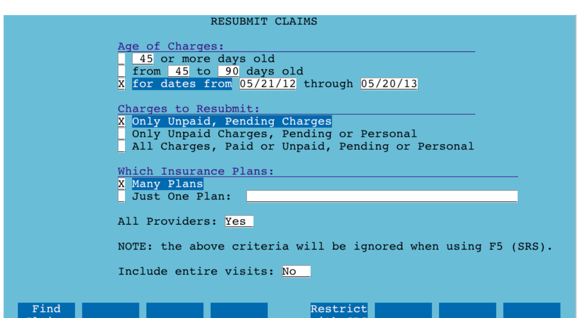
# Insurance Collections
## Post Visit – Follow Up Partner Tools

- maketags
- insaging
- inscoar – interactive mode
- srs Billing & Collection reports
- ecsreports
- allowedit
- cfs



# Insurance Collections
## Post Visit – F/U Partner Tools maketags

- ONLY for special circumstances



# Insurance Collections

## Post Visit – F/U Partner Tools insaging

- Use to find insurance companies not paying timely

Insurance Company Aging Report - All Providers 05/21/13

| Ins Group | Current | 30-59 | 60-89 | 90-119 | 120+ | Total | Percen |
|---|---|---|---|---|---|---|---|
| Personal | 5,676 | 6,348 | 3,426 | 1,746 | 63,973 | 81,172 | 52 |
| Medicaid | 0 | 0 | 0 | 0 | 46 | 46 | 0 |
| Aetna USHC HMO | 1,426 | 180 | 265 | 0 | 0 | 1,871 | 1 |
| Aetna MC & Elect | 1,259 | 0 | 0 | 0 | 0 | 1,259 | 1 |
| Aetna Open | 2,099 | 441 | 0 | 0 | 0 | 2,540 | 2 |
| BCBS | 2,521 | 30 | 619 | 38 | 122 | 3,331 | 2 |
| Capital Blue Cross | 10,638 | 4,950 | 99 | 0 | 588 | 16,275 | 11 |
| Health America | 4,873 | 621 | 165 | 0 | 15 | 5,674 | 4 |
| Keystone HealthPlan | 2,028 | 146 | 185 | 40 | 261 | 2,660 | 2 |
| HealthyKids HMO | 371 | 491 | 206 | 0 | 332 | 1,400 | 1 |
| Private Insurance | 13,290 | 2,310 | 346 | 460 | 913 | 17,320 | 11 |
| Cigna | 393 | 0 | 0 | 0 | 0 | 393 | 0 |
| Highmark Blue Shield | 16,922 | 1,141 | 0 | 72 | 60 | 18,195 | 12 |
| Retired Insurance Plans | 1,267 | 1,043 | 105 | 143 | 169 | 2,727 | 2 |
| Total | 62,765 | 17,702 | 5,417 | 2,499 | 66,480 | 154,865 | |
| Percentage | 41% | 11% | 3% | 2% | 43% | | |

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# Insurance Collections

## Post Visit – F/U Partner Tools inscoar

- inscoar generates a list of outstanding claims
  - Interactive gives you access to everything!
    - fame (notes)
    - notjane
    - refund
    - pam
    - pip
    - oops
    - checkout

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# Insurance Collections

## Post Visit – F/U Partner Tools inscoar

```
                          INSCOAR INTERACTIVE SCREEN
        Use the PgUp and PgDn keys to scroll through this information.

                                                         TOTAL: $     543.00

X     ACCOUNTS WITH BALANCES PENDING Health America HMO $10/20 ()

X Moyer, Donald J. (#1372)
  PARTNER: Moyer, Donald J.
    Moyer, Jeremy  (#2512)  (09/30/12) (ID: 850435296-03, Grp: Moy665)
      12/08/2012 O DTaP                      90700     V06.1  O   $     45.00
                  12/08/12 Health America claim batched
                  12/09/12 Claim (from Health America) to PROXYMEDhamerica
      12/08/2012 O HepB/Hib                  90748     V06.8  O   $     80.00
                  12/09/12 Health America claim batched
                  12/10/12 Claim (from Health America) to PROXYMEDhamerica
                                                                  -----------
                                                                  $    125.00

  Show     Hide               WorkWith        New     Next   Previous  Bop To
MoreInfo MoreInfo              Entry        Pattern   Match   Match     Top
```

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## Insurance Collections

### Post Visit – F/U Partner Tools srs

- Billing & Collections
  - Gross Collection Ratio Report

**Gross Collection Ratio Report**

| Ins Group at Time of Service | Charge Amount | Amount Collected (all pmts + all adjs) | Percent Collected (all pmts + all adjs) | Amount Deposited (all pmts) | Percent Deposited (all pmts) |
|---|---|---|---|---|---|
| Personal/No Insurance | $10,459.27 | $10,459.27 | 100.00% | $7,535.28 | 72.04% |
| Aetna USHC HMO | $16,768.02 | $16,768.02 | 100.00% | $5,433.00 | 32.40% |
| Aetna MC & Elect | $7,068.30 | $7,068.30 | 100.00% | $5,325.80 | 75.35% |
| BCBS | $30,049.30 | $30,049.30 | 100.00% | $24,710.89 | 82.23% |
| Health America | $47,321.44 | $47,321.44 | 100.00% | $29,077.26 | 61.45% |
| Aetna Open | $11,228.00 | $11,228.00 | 100.00% | $6,699.30 | 59.67% |
| Keystone HealthPlan | $35,695.00 | $35,695.00 | 100.00% | $8,695.28 | 24.36% |
| Private Insurance | $149,265.09 | $149,265.09 | 100.00% | $97,110.55 | 65.06% |
| HealthyKids HMO | $24,060.00 | $24,060.00 | 100.00% | $18,452.33 | 76.69% |
| Cigna | $9,115.22 | $9,115.22 | 100.00% | $7,279.12 | 79.86% |
| Capital Blue Cross | $113,431.24 | $113,431.24 | 100.00% | $91,355.80 | 80.54% |
| Highmark Blue Shield | $97,533.57 | $97,533.57 | 100.00% | $78,892.47 | 80.89% |
| Retired Insurance Plans | $51,980.60 | $51,980.60 | 100.00% | $42,161.28 | 81.11% |
| | $603,975.05 | $603,975.05 | 100.00% | $422,728.36 | 69.99% |

Criteria for this report run.
Transaction Date Range: 07/12/11 - 07/11/12

Charge Amount Due selection.
Range is between $0.00 and $0.00.



## Insurance Collections

### Post Visit – F/U Partner Tools srs

- Billing & Collections
  - Claim Error Report (preptags/Proxymed/Emdeon Claims)

**Claim Error Report (preptags/Proxymed/Emdeon Claims)**

Responsible Party Group: Private Insurance
Current Billing Status: Tagsplit Error/Rejection

| Acct | Acct Last Name | Acct First Name | Pat | Pat First Name | Date of Current Billing Status | Current Billed Message | Transaction Date | Charge Amount | Amount Due |
|---|---|---|---|---|---|---|---|---|---|
| 477 | Gordon | Neeru | 733 | Jason | 07/05/12 | Claim (from Private Insurance) to Error | 06/29/12 | $56.00 | $46.00 |
| 0 | | | 0 | | | | | $56.00 | $46.00 |
| 0 | | | 0 | | | | | $56.00 | $46.00 |

Responsible Party Group: HealthyKids HMO
Current Billing Status: Tagsplit Error/Rejection

| Acct | Acct Last Name | Acct First Name | Pat | Pat First Name | Date of Current Billing Status | Current Billed Message | Transaction Date | Charge Amount | Amount Due |
|---|---|---|---|---|---|---|---|---|---|
| 428 | Keller | Alan | 2429 | Thomas | 07/05/12 | Claim (from HealthyKids HMO) to Error | 01/28/12 | $15.00 | $15.00 |
| 931 | Wells | Jack | 1173 | Anna | 07/05/12 | Claim (from HealthyKids HMO) to Error | 06/24/12 | $56.00 | $46.00 |
| 0 | | | 0 | | | | | $71.00 | $61.00 |
| 0 | | | 0 | | | | | $71.00 | $61.00 |

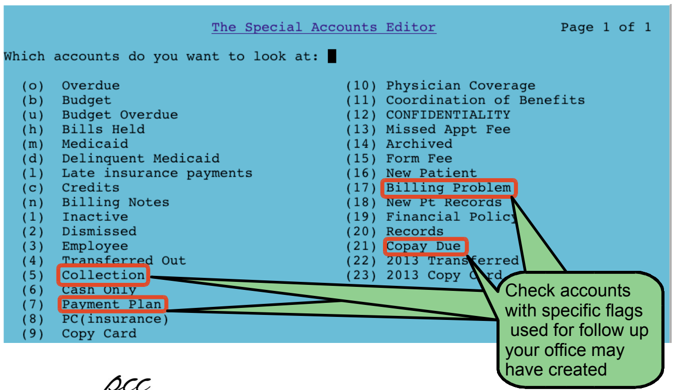


## Insurance Collections

### Post Visit – Follow Up Partner Tools

- Allowables
  - allowedit
  - srs
    - Allowable Overpayments Report
      - by Payor Grp and Chk, Subtotal by Schedule
    - Allowable Underpayments Report
      - by Payor Grp and Chk, Subtotal by Schedule
- Attend the **Optimizing Partner with Configuration** theme to see how to setup your allowable / fee schedules and let Partner track under and over payments for you automatically!

## Insurance Collections
## Post Visit – F/U Partner Tools cfs






## Insurance Collections
## Post Visit – F/U

- Challenges:
  - Variety of plans covering your families
  - Coding requirements
    - usually made without notice
  - Ever-changing payer 'rules'
    - use a modifier, don't use a modifier
  - Claims submission address changes



## Insurance Collections
## Post Visit – F/U

- Division of work load
  - By carrier
  - By task
    - Claims submission
    - Payment posting
    - Follow up on denials
    - Follow up on unpaid claims
      - Denials, no responses

## Insurance Collections
### Post Visit – F/U Unpaid Claims

- Follow up schedule for contacting the carrier
- Call if no acknowledgment of receipt of claims
  - 10 days for paper
  - 3 days for electronic
- inscoar
- srs



## Insurance Collections
### Post Visit – F/U Denial Management

- Create denial/appeals procedure
- Automate appeal form letters
- Reminder system for followup
  - tickle
  - Account flags

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## Insurance Collections
### Post Visit – F/U Appeals

- Know you payer contacts
  - Claims services representative
  - Provider services representative
  - Claims supervisor
  - Appeals coordinator
  - Medical review manager
  - Medical Director

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## Insurance Collections
### Post Visit – F/U Appeals

- Sample phone call with carrier
  - Have necessary data in front of you
    - inscoar: interactive mode
  - Know the history of the claim
  - Ask for a time estimate for response



## Insurance Collections
### Post Visit – F/U Appeals

- Sample phone call with carrier
  - Make detailed notes in the Family Editor (fame)
    - Track start/end time
    - Names, titles, phone number and extension
    - Check numbers and dates
    - Claim id numbers

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## Insurance Collections
### Post Visit – F/U Denials/Appeals

- For more on denials and appeals
  - Attend Donelle Holle's Denial & Appeal Strategies, Friday 2:45pm!

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## Personal Collections
### Post Visit

- Send personal bills
- Post payments
- Work Personal A/R
- Sending an Account to Collections
- Reports



## Personal Collections
### Post Visit – bills/ebills

- Personal bills
  - ebills vs bills
    - Sample bill
  - Cycle billing
    - Alphabet range
    - Partner cycle billing
  - Billing messages
  - Finding bills sent in the past

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## Personal Collections
### Post Visit – bills/ebills

ebills vs bills

ebills:

- Look more professional
- Submit electronically
- Cost per bill
  - $.79366 first page
  - $.2235 each addt'l page

bills:

- Plain printing, nothing fancy
- Print in your office
- Folding, stuffing, stamping, and time costs
- More control

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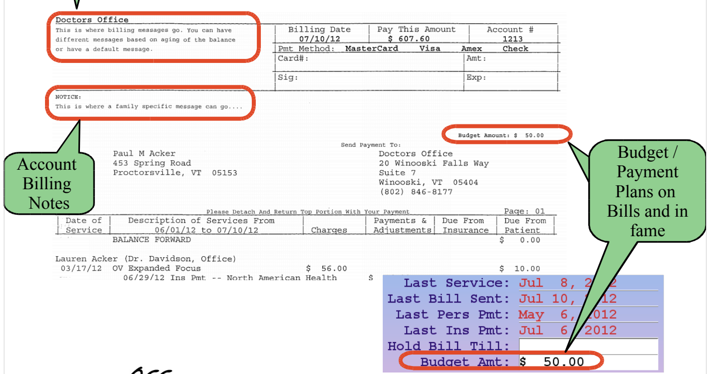
# Personal Collections

## Post Visit - bills

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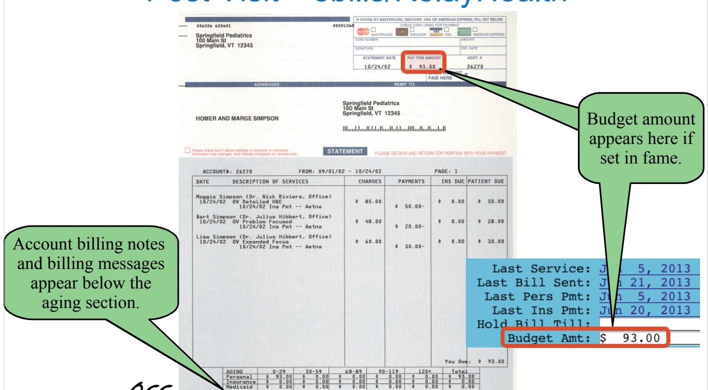
# Personal Collections

## Post Visit – ebills/RelayHealth

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# Personal Collections

## Post Visit – Cycle Billing

- Sending out bills weekly instead of monthly
  - Personal payments come in all month
- Manual cycles
  - Breaking up bills by:
    - Alphabet range
    - Aging range
    - Zip code range

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# Personal Collections

## Post Visit – Cycle Billing

- Partner Cycle Billing
  - Set your cycle to 28 / 30 days
    - Or any other number you like
  - Run bills weekly
  - Accounts get a bill if:
    - they have a new personal balance in the last 7 days
    - they have not received a bill for 28 / 30 days, based on what you set your cycle to in ced

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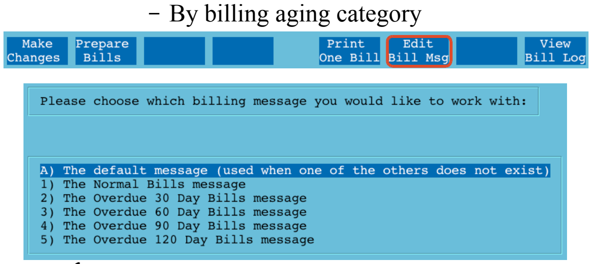
# Personal Collections

## Post Visit – Billing

- Billing Messages
  - Available in ebills and bills
  - By billing aging category

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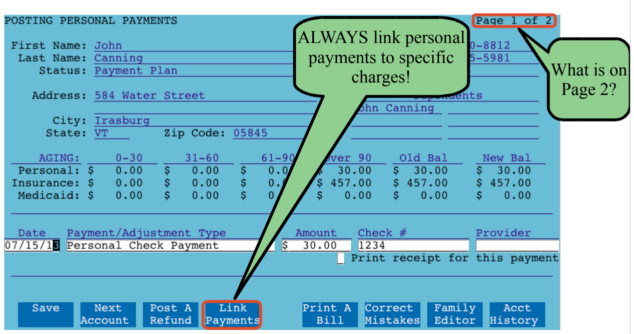
# Personal Collections

## Post Visit – Billing:Posting Pers Pmts

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# Personal Collections

## Post Visit – Billing

- Account Billing Notes
  - Available in the Family Editor (fame)

```
Acct PCC: 1                 The Family Editor                    Page 4 of 5
                  Account Billing Note: John Canning
     Search Pattern: ____________________  Search on whole words: No

X 04/16/12 Please remember to pay a minimum of your payment plan amount. Thank
         you!
                                                  - 02:26 pm lynne    (Modified)
```

  - Use cfs to track which accounts have account billing notes

```
                     The Special Accounts Editor                  Page 1 of 1

Which accounts do you want to look at:
  (c)   Credits                               (17) Billing Problem
  (n)   Billing Notes                         (18) New Pt Records
  (l)   Inactive                              (19) Financial Policy
```



# Personal Collections

## Post Visit – Billing billlog

- Researching previously sent bills
  - billlog
  - aka F8 in bills/ebills

```
 Make     Prepare                         Print     Edit               View
Changes    Bills                        One Bill  Bill Msg           Bill Log
```



# Personal Collections

## Post Visit – Billing billlog

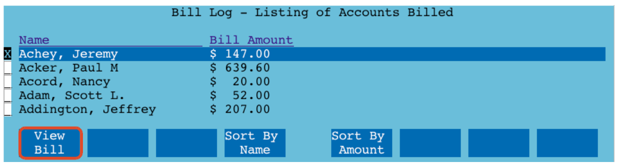
Bill Log - Bill Batch Listing

| | Date | Who | Date Range | Zip Range | Alphabet Range | Bill Agings |
|---|---|---|---|---|---|---|
| X | 05/20/13 | lynne | 04/01/03-05/19/13 | 00000-99999 | a-z | 0,30,60,90,120 |
| | 05/13/13 | randy | 04/01/03-05/12/13 | 00000-99999 | a-z | 0,30,60,90,120 |
| | 05/06/13 | lynne | 04/01/03-05/05/13 | 00000-99999 | a-z | 0,30,60,90,120 |
| | 04/29/13 | erica | 04/01/03-04/28/13 | 00000-99999 | a-z | 0,30,60,90,120 |
| | 04/22/13 | lynne | 04/01/03-04/21/13 | 00000-99999 | a-z | 0,30,60,90,120 |
| | 04/15/13 | erica | 04/01/03-04/14/13 | 00000-99999 | a-z | 0,30,60,90,120 |
| | 04/08/13 | lynne | 04/01/03-04/07/13 | 00000-99999 | a-z | 0,30,60,90,120 |
| | 03/25/13 | amanda | 04/01/03-03/24/13 | 00000-99999 | a-z | 0,30,60,90,120 |
| | 03/20/13 | erica | 04/01/03-03/19/13 | 00000-99999 | a-z | 0,30,60,90,120 |
| | 03/11/13 | lynne | 04/01/03-03/10/13 | 00000-99999 | a-z | 0,30,60,90,120 |
| | 03/04/13 | randy | 04/01/03-03/03/13 | 00000-99999 | a-z | 0,30,60,90,120 |
| | 02/25/13 | amanda | 04/01/03-02/24/13 | 00000-99999 | a-z | 0,30,60,90,120 |
| | 02/18/13 | lynne | 04/01/03-02/17/13 | 00000-99999 | a-z | 0,30,60,90,120 |
| | 02/11/13 | amanda | 04/01/03-02/10/13 | 00000-99999 | a-z | 0,30,60,90,120 |
| | 02/04/13 | erica | 04/01/03-02/03/13 | 00000-99999 | a-z | 0,30,60,90,120 |
| | 01/28/13 | lynne | 04/01/03-01/27/13 | 00000-99999 | a-z | 0,30,60,90,120 |
| | 01/21/13 | lynne | 04/01/03-01/20/13 | 00000-99999 | a-z | 0,30,60,90,120 |
| | 01/14/13 | lynne | 04/01/03-01/13/13 | 00000-99999 | a-z | 0,30,60,90,120 |
| | 01/07/13 | randy | 04/01/03-01/06/13 | 00000-99999 | a-z | 0,30,60,90,120 |

```
Accounts  Accounts
 Billed   NotBilld
```

# Personal Collections
## Post Visit – Billing billlog

- Accounts Billed
  - See who received a bill
  - Includes the bill amount
  - View the actual bill sent using F1

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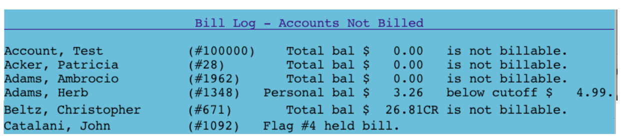
# Personal Collections
## Post Visit – Billing billlog

- Accounts Not Billed
  - See who did not receive a bill
  - Includes why they did not receive one

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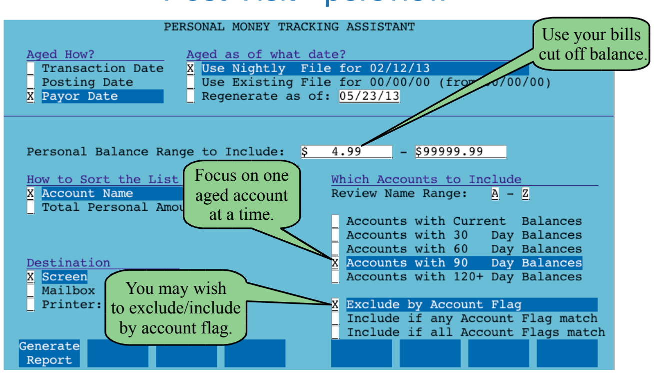
# Personal Collections
## Post Visit - persview

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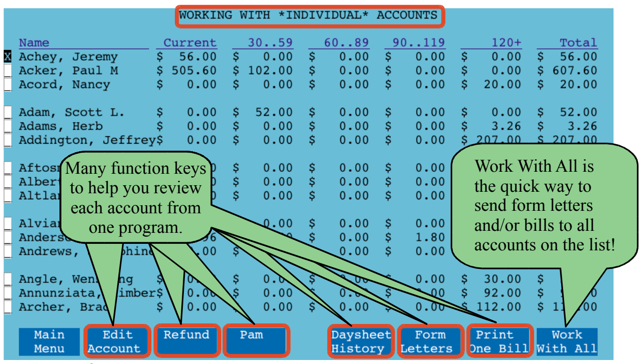
# Personal Collections

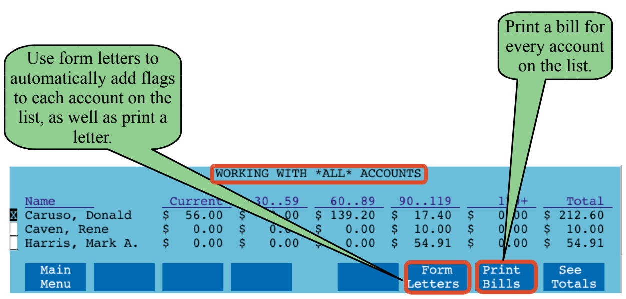
## Post Visit - persview






# Personal Collections

## Post Visit - persview

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# Personal Collections

## Post Visit – Payment Plans

- Setting up a payment plan
  - Create a form letter explaining their responsibilities
    - Have them sign it
    - Track when they sign the form
  - Update the Budget field in fame
  - Give them a flag so you can easily review the accounts on a payment plan to verify they are paying

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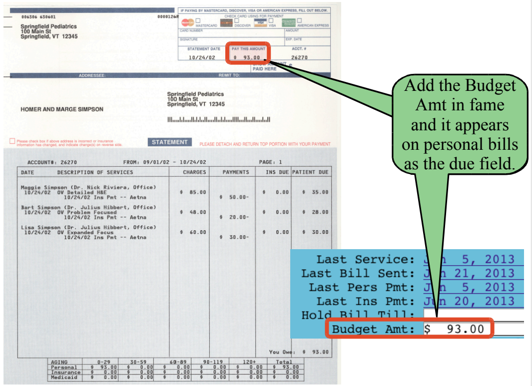
# Personal Collections

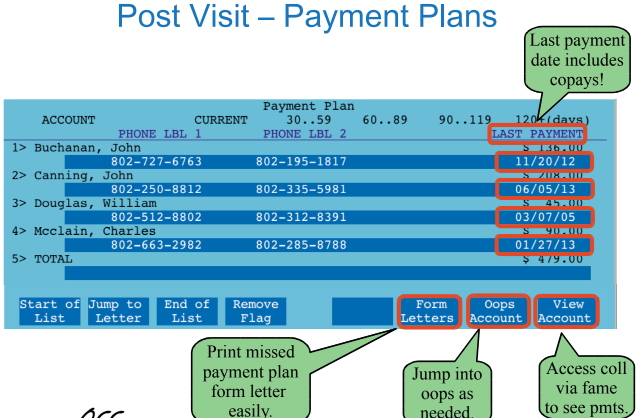
## Post Visit – Payment Plans






# Personal Collections

## Post Visit – Payment Plans






# Personal Collections

## Post Visit - notify

- Notify allows you to send account balance information.
  - Hello this is Pediatric Associates calling. Our records indicate that your account is more than 60 days overdue. Please call our office at 800-722-1082 to arrange payment today. Thank you!

# Personal Collections

## Post Visit – Collections

- Sending an account to collection agency, two options
  - Adjust off charges
  - Pend charges to Agency
- Regardless of option selected above:
  - Print charge information for collection agency
    - Use Collection Report (F3 in fame, coll) or Account History (F8 in fame, tater)



# Personal Collections

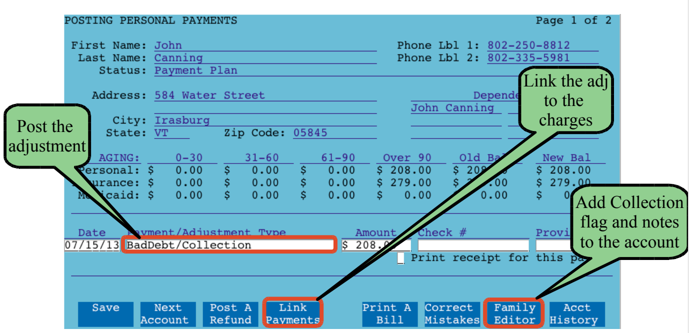
## Post Visit – Collections: Adjust Charges

- Run Post Personal Payments (pam)
  - Find account
  - Post Bad Debt/Collection Adjustment and link to charges being sent to collections.
  - Add Collection flag to account
  - Update account notes



# Personal Collections

## Post Visit – Collections: Adjust Charges



## Personal Collections

### Post Visit – Collections: Adjust Charges

- When you receive a payment from the collection agency do one of the following two options, then add a note in fame.
  - Delete the bad debt adjustment you posted and post the payment using a payment type that indicates the payment was from a collection agency.
    - You may need to post another adjustment
  - Post a "Collection Income" adjustment in the refund program and then post a Collection Payment against that adjustment using pam.

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## Personal Collections

### Post Visit – Collections: Pend Agency

- Partner configuration needed for this option
  - Add “Collection” as an insurance group
  - Adding “1. Collection Agency” as an insco
    - This makes it easier to find in oops

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## Personal Collections

### Post Visit – Collections: Pend Agency

- Partner configuration needed for this option
  - Add “Collection” as an insurance group
  - Adding “1. Collection Agency” as an insco
    - This makes it easier to find in oops
- Go into Correct Mistakes (oops) for this account and change the charges to pend the 1. Collection Agency
  - Add Collection flag and notes to the account

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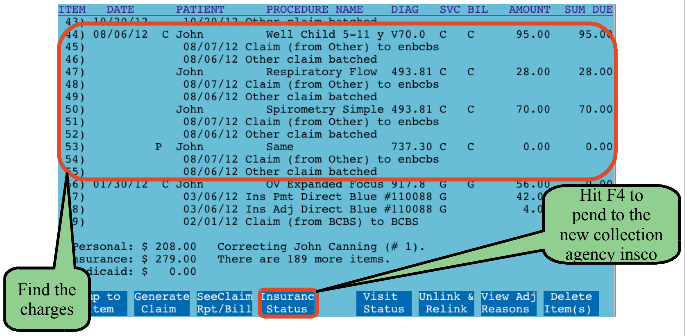
# Personal Collections

## Post Visit – Collections: Adjust Charges

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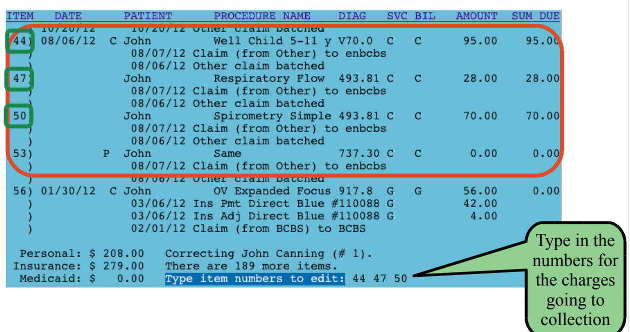
# Personal Collections

## Post Visit – Collections: Adjust Charges

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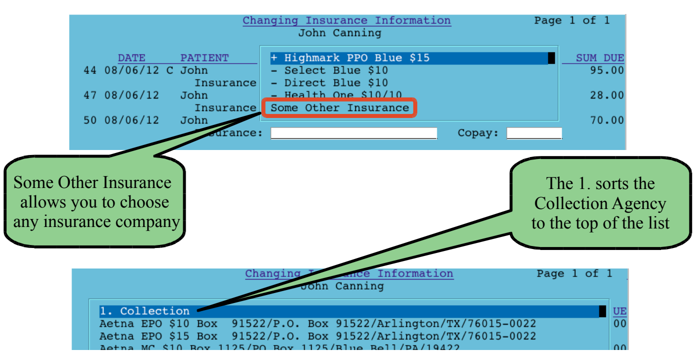
# Personal Collections

## Post Visit – Collections: Adjust Charges

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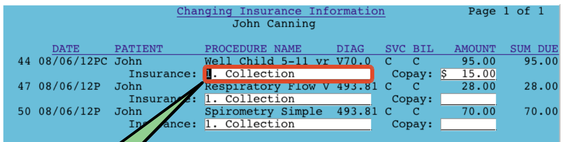
# Personal Collections
## Post Visit – Collections: Adjust Charges



Changing Insurance Information — Page 1 of 1

John Canning

| | DATE | PATIENT | PROCEDURE NAME | DIAG | SVC | BIL | AMOUNT | SUM DUE |
|---|---|---|---|---|---|---|---|---|
| 44 | 08/06/12PC | John | Well Child 5-11 yr | V70.0 | C | C | 95.00 | 95.00 |
| | | Insurance: | 1. Collection | | | Copay: | $ 15.00 | |
| 47 | 08/06/12P | John | Respiratory Flow V | 493.81 | C | C | 28.00 | 28.00 |
| | | Insurance: | 1. Collection | | | Copay: | | |
| 50 | 08/06/12P | John | Spirometry Simple | 493.81 | C | C | 70.00 | 70.00 |
| | | Insurance: | 1. Collection | | | Copay: | | |

Now hit F1 to save and the charges will be pending collection



# Personal CollectionsPost Visit – Collections: Adjust Charges

- Use insaging and inscoar to review charges pending the "1. Collection" insurance company.
- Post payments using pip
  - Leave balance pending "1. Collection" or adjust off
- Update notes on the account in fame
  - Post a follow up to the original note



# Personal Collections
## Post Visit – Other Reports

- Smart Report Suite (srs)
  - Billing & Collections Reports
    - Accounts with Credit Balances
    - Collection Worksheet for Appointments
    - Copay Collection Ratio
    - Insurance Eligibility Report
    - Insurance Eligibility Report for Same Day Appts

## Ins & Pers Collections
### Review

- Pre Visit
  - Scheduling
  - Appointment Verification
  - Eligibility Verification
  - Billing Department Prep



## Ins & Pers Collections
### Review

- Visit Date
  - Patient Check In (checkin)
  - Posting Charges (checkout)
  - Clean claims



## Ins & Pers Collections
### Review

- Post Visit Insurance
  - Claims submission
  - Posting payments / responses
  - Claims follow up
  - Claim submission tools and reports

# Ins & Pers Collections

## Review

Post Visit Personal

- Send personal bills
- Post payments
- Work Personal A/R
- Sending an Account to Collections
- Reports



# Ins & Pers Collections

## learn.pcc.com

- Click on Partner
  - Click on Insurance Billing
    - http://learn.pcc.com/Content/Partner/InsuranceBilling/InsuranceBillingIntro.htm
  - Click on Personal Billing
    - http://learn.pcc.com/Content/Partner/PersonalBilling/PersonalBillingIntro.htm

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