Insurance Billing Workflow:
From Claim to Paid

Lynne Y Gratton, CPPM

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Insurance Billing Workflow

Overview

- What Is This Course About?
- Pre-Visit
- Time of Visit
- Post Visit Tasks

Insurance Billing Workflow

What is this course about?

- The basics of insurance billing workflow
- The accompanying handout

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THRIVING THROUGH CHANGE

Insurance Billing Workflow

Pre-Visit

- Eligibility
- Update policies
- Update demographics

Insurance Billing Workflow

Pre-Visit: Eligibility

- Verify at least 1-2 days in advance
- Be pro-active in updating inactive policies!

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Insurance Billing Workflow

Pre-Visit: Update demographics

- Opportunities to do this
  - When scheduling
  - During eligibility verification

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THRIVING THROUGH CHANGE

Insurance Billing Workflow

Pre-Visit: Update policies

- Opportunities to do this
  - When scheduling
  - During eligibility verification

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THRIVING THROUGH CHANGE

Insurance Billing Workflow

Time of Visit

- Collect copays
- Collect previous balances
- Update policies
- Update demographics
- Add/verify patient portal

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Time of Visit: Collect copays

- Have the front desk track why they did not collect a copay

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Time of Visit: Collect previous balances

- Teach them how to use the system to review previous balances or give them a note for each account with a previous balance so they can answer questions

Insurance Billing Workflow

Account Balances

Hank & Peggy Hill (Account # 11)

Aging	0-29 days	30-59 days	60-89 days	90-119 days	120+ days	Credit	Total Balance
Personal	**49.64**	0.00	0.00	0.00	**25.00**	0.00	**74.64**
Insurance	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Medicaid	0.00	0.00	0.00	0.00	0.00	0.00	0.00

▼ counters with Outstanding Personal Balances

Luanne Hill (PCC# 14)   Benjamin Franklin Pierce MD   PCC Pediatrics

Date	Description	Charge	Payment/Adj	Insurance Due	Medicaid Due	Personal Due
08/29/18	OV Low Complex	150.00		0.00		**62.76**
07/08/19	Ins Pmt - BCBS $25		87.24			
	Deductible Amount					
	Co-payment Amount					
08/29/18	Rapid Strep Test	25.00		0.00		**11.88**
07/08/19	Ins Pmt - BCBS $25		13.12			
	Deductible Amount					
		175.00	100.36	0.00	0.00	**74.64**

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THRIVING THROUGH CHANGE

Insurance Billing Workflow

Time of Visit: Collect previous balances

- Have the front desk track why they did not collect a previous balance

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Time of Visit: Update demographics

- Again, stress the importance of good data entry
- They have been able to do this in the EHR for a couple of releases now.

Insurance Billing Workflow

Time of Visit: Update policies

- Make sure they understand insurance plans you accept.
- Stress the importance of good data entry
- They can do this in the EHR now!

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Insurance Billing Workflow

Time of Visit: Add/verify patient portal

- Accounts can view due balances.
- Payments can be posted directly from the portal!

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Post Visit

- Post charges
- Check for errors
- Send claims
- Fix preptags errors
- Crucial reports

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Insurance Billing Workflow

Post Visit: Post charges

- Coming soon: Charge Posting in the EHR!
- Timely posting
    - Work with providers who do not bill in a timely manner

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Insurance Billing Workflow

Post Visit: Check for errors

- Run dailycheck before submitting claims
  - What are you looking for?

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Insurance Billing Workflow

Post Visit: Any Outstanding Visits?

- EHR Report Library
  - Visits
  - Visits by Billing Status
    - Update your date range
    - Change Visit Posting Status to Unposted

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Insurance Billing Workflow

Post Visit: Send claims

- How often?
- To claim delay or not, that is the question!

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Post Visit: Fix preptags errors

- tagsplit/preptags bad claims
  - These have to be fixed and resubmitted

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Insurance Billing Workflow

Post Visit: Crucial reports

- Billing Error Report
  - Use Correct Mistakes, oops, to view the complete error
  - Generate a claim after correcting the error

Insurance Billing Workflow

Post Visit: Crucial reports

- Claims Never Submitted
  - Use an ending date of the last time you submitted or one day longer than your claim delay
  - Use Correct Mistakes, oops, to generate a claim

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THRIVING THROUGH CHANGE

Review

- Pre-Visit
- Time of Visit
- Post Visit Tasks

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