## Front Desk & Back Office: Your Two Keys to Success

Lynne Y Gratton, CPPM PCC 2014 Users' Conference



#### Front Desk & Back Office

#### Overview

- Take Away
- Front Desk Best Practices
- Pre Visit
- Visit Date
- Post Visit

#### Front Desk & Back Office

- What is the Take Away?
  - Learning the importance of the front desk and back office working together to collect money.
  - Tools to help

#### Front Desk Best Practices

- Customer service
- Telephones
- Keep them busy
- Goals for the front desk
- Oversight

# Front Desk Best Practices – Customer Service

- First impressions count
- Get rid of the glass
- Greet patients immediately
- Work as a team, help each other with overflow
- Separate sick and well waiting rooms

# Front Desk Best Practices – Customer Service

- Wait for a response before putting someone on hold
- Discuss significant billing issues in private
  - Have at least one billing staff
     with an office near the front
- Do not discuss other parents/patients at the front desk

#### Front Desk Best Practices – Phones

- Move phone triage away from the front desk
  - Allow front desk staff to focus on verifying demographics, insurance, collecting payments
  - Use phone system to appropriately route calls

## Front Desk Best Practices – Keep Them Busy

- There should be no down time at the front desk
- If things slow down, have them work on recall lists
  - Call patients overdue for well visits,
     Asthma checkups, ADHD checkups,
     flu shots, etc.

#### Front Desk Best Practices – Goals

#### Goals of the front desk:

- Great customer service
- Generate clean claims from a demographics stand point
- Increase time of service payments
- Reduce the amount of collections after the visit

#### Front Desk Best Practices – Oversight

- Track how much recall they are doing
- Track copay collection rates
- Track collections for past due balances
- Set goals and reward staff for achievements

#### Pre-Visit

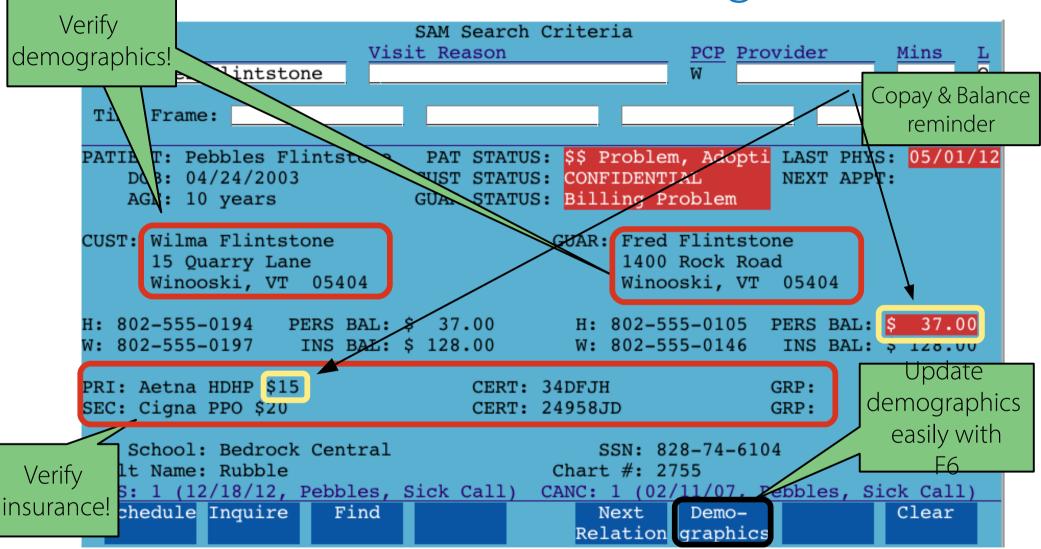
The processes used *prior* to when a patient comes in will impact the quality of your claims, increase TOS payments, and help reduce the amount of collections needed.

In short the Front End functions drive the revenue cycle.

#### Pre-Visit

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

## Pre-Visit: Scheduling





#### Pre-Visit: Scheduling

- New Patient Process
  - Who collects insurance information over the phone?
  - F4/F7 can be configured to bring you directly to eligibility and the policy program
  - Remind them to bring their insurance card and copay

#### 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
    - payment for expected copay & outstanding balances



#### Pre-Visit: Appointment Verification

Appointment Verification

- Why?

- When?

- How?



#### Pre-Visit: Appointment Verification

What to verify during reminder calls

- Date, time and visit reason
- Insurance plan, subscriber, start/end dates
- Reminders

## Pre-Visit: Eligibility Verification

Eligibility Verification

- Why?

- When?

- How?

#### Pre-Visit: Eligibility Verification

- Partner's elig program
  - Auto eligibility overnight
  - Update policy information as needed through elig, especially **copays**!
  - Use notes for the front desk to see at checkin
  - Eligibility for visits more than two days away?



#### 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 and share with the front desk.

#### Same Day Visits

- Scheduling
  - Verification
  - Reminders

- Eligibility
  - Real time with elig if possible
  - Check online/via phone as needed

## Day of Visit

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

#### Day of Visit: checkin

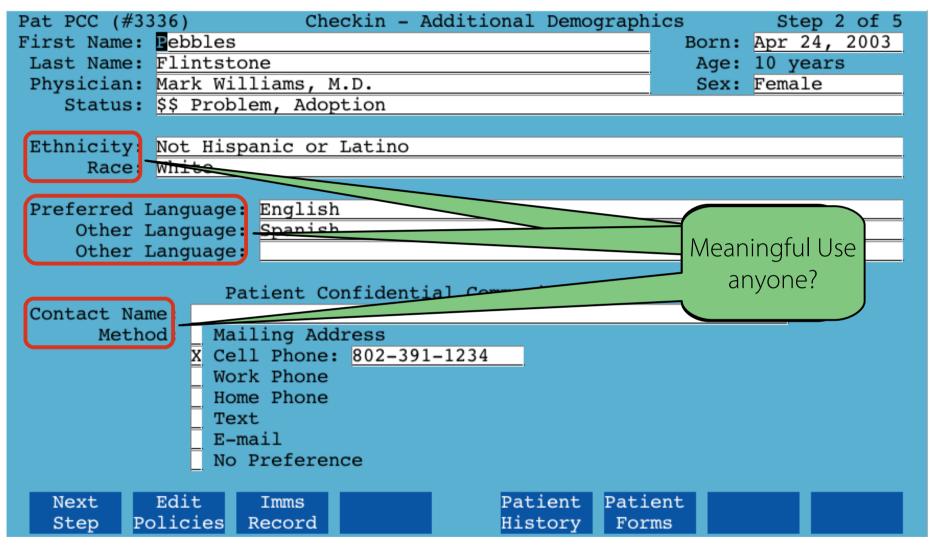
- Why use checkin?
  - Most Common Clearinghouse Claim Rejection Reasons can be avoided by properly using the checkin program
  - TOS payments

## Day of Visit: checkin Demographics

```
Pat PCC (#3336)
                                   Checkin - Demographics
                                                                           Step 1 of 5
              ame: Pebbles
                                                                  Born: Apr 24, 2003
  Update
              me: Flintstone
                                                                   Age: 10 years
              an: Williams
                                                                   Sex: Female
demographics
              us: $$ Problem, Adoption
              SSN: 828-74-6104
                                            Alt Name: Rubble
             hool: Bedrock Central
                                             Chart #: 2755
              Patient Lives with Wilma Flintstone (#1981)
          us: CONFIDENTIAL
          dr: 15 Quarry Lane
                                                          Home Phone: 802-555-0194
           \r:
                                                          Work Phone: 802-555-0197
           v: Winooski
                                                          Cell Phone: 802-555-0161
       Stat
                       Zip Code: 05404
                                                           Emg Phone: 802-555-0168
       Email
              stones@HannaBarbera.com
              Bills Sent to Fred Flintstone (#1980)
      Status: Billing Problem
        Addr: 1400 Rock Road
                                                          Home Phone: 802-555-0105
                                                          Work Phone: 802-555-0146
        Addr:
        City: Winooski
                                                          Cell Phone: 802-555-0112
       State: VT
                        Zip Code: 05404
                                                           Emg Phone:
       Evail: stones@HannaBarbera.com
          Next
                   Edit
                            Edit
                                   Reassign
                                                                     Reprint
                                                                             Billing
                                                             Make
                 Patient
          Step
                          Account
                                   Account
                                                                    Enc Form FKey Set
                                                             Appt
```

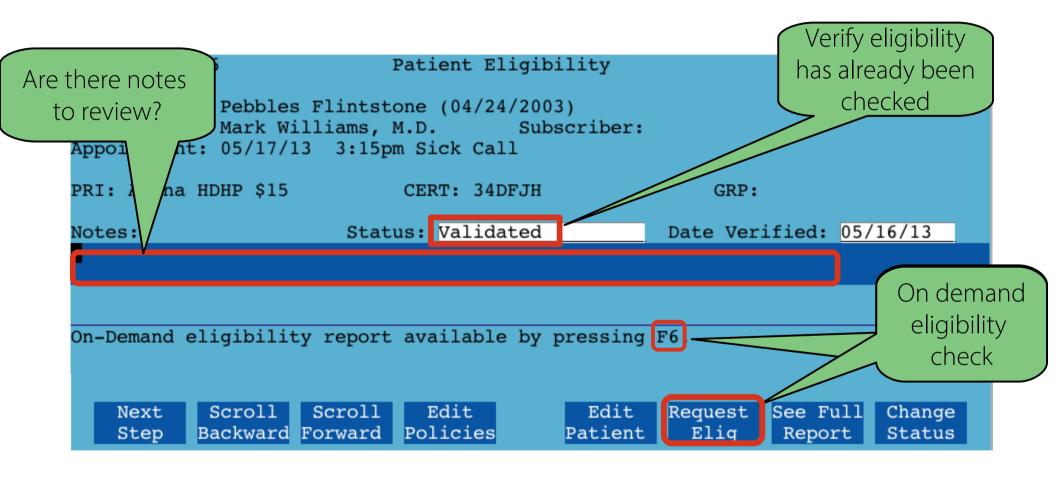


## Day of Visit: checkin Demographics





## Day of Visit: checkin Eligibility

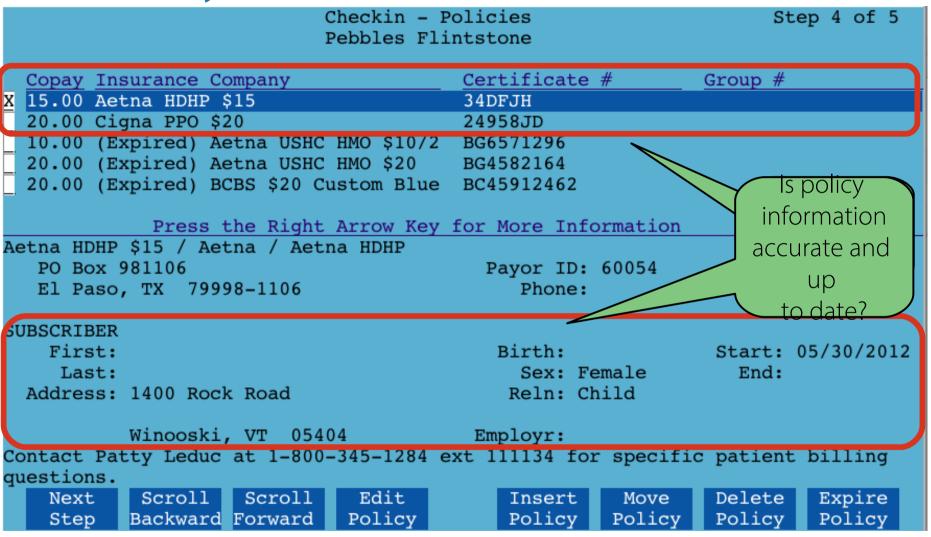




#### Day of Visit: checkin Eligibility

- 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 or the insurance will not return a response.

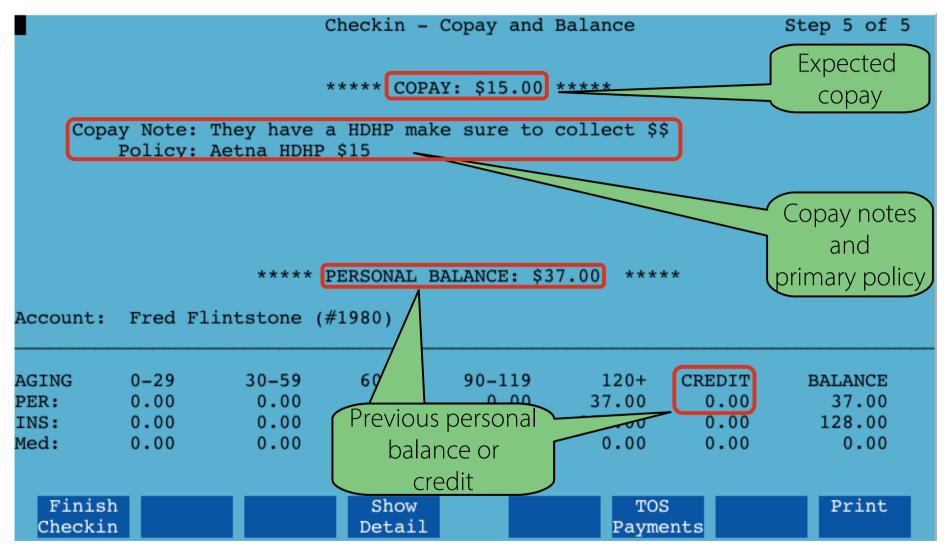
#### Day of Visit: checkin Policies





#### Day of Visit: checkin Policies

- Always get a copy of their insurance card
- Verify subscriber information





- Questions about a past due balance?
  - Use F4 to Show Details

Finish Checkin	Show Detail	С	TOS Payme:	_	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

- Make sure to collect the proper copay amount, sick vs. well
- HSA Accounts
- Credits appear as a instead of a CR as part of the balance

- Store and process credit card payments online
  - Get authorization from the family to charge their credit card for outstanding balances
  - Flag their account
- Use a secure web service
  - PaySimple (paysimple.com)
  - PayPal



#### Day of Visit: checkout

- Schedule next appointment
- Missed appointments
- Proper insurance configuration
- checkout screens pre-set by visit reason
- SNAP codes
- Clean claims
- Account for all visits

#### Day of Visit: checkout

- Schedule next appointment
  - Make sure your schedule is out at least 6 months so you can schedule younger children easily, 1 year is better!

#### Day of Visit: checkout

- Track missed appointments
  - Charge for missed appointments and make sure that is part of your financial policy
  - When you post a missed appointment fee in Partner, make sure it is configured to automatically mark the appointment missed in Patient Inquire (inquire)

# Day of Visit: checkout Insurance Config

- Proper insurance configuration
  - Pending correct procedures
  - Submitting correct procedures
  - Different copays for well vs. sick codes
  - Support can help you fix any of these not working properly.

## Day of Visit: checkout Screens

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

## 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 each!
  - Can be placed on screens using the Charge Screen Editor (csedit)



## Day of Visit: checkout Clean Claims

- Verifying quality claims
  - Daysheet Postings Check (dailycheck)
  - Changing insurance after charges are posted

Pre-authorization / Referral requirements



## Day of Visit: checkout Clean Claims

- Always link diagnoses to procedures
- Certified coder on staff
- Train staff on basic coding scenarios
- Use SNAP codes to reduce missed procedures

#### Post Visit

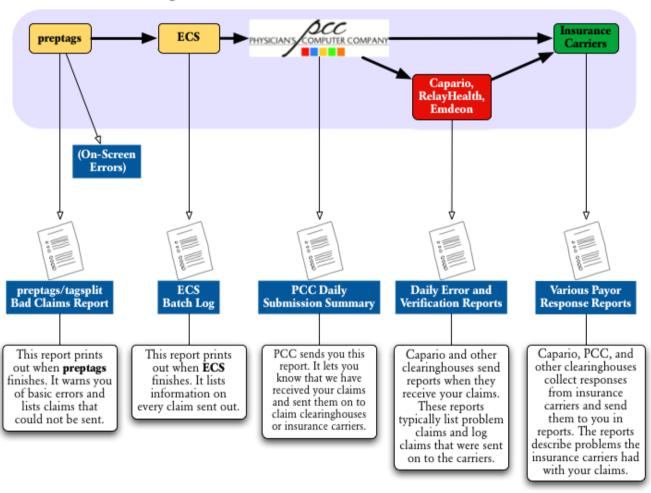
- Insurance Collections
- Personal Collections

#### Post Visit: Insurance Collections

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

#### Post Visit: Claim Submission

#### Reports You Receive As Your Claim is Processed





#### Post Visit: Claims Submission

- preptags
  - Bad Claims Report
  - 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



#### Post Visit: Claim Submission

- Partner Claim Responses
  - ECS Batch Logs
- Clearinghouse/Intermediary Responses
  - Delivered via clearinghouse or gateway
  - Rejected claims are not submitted to payers
  - Accepted claims are submitted to payers



#### Post Visit: Claim Submission

- Finding Electronic Claim Responses in Partner
  - Correct Mistakes (oops)
  - EDI Reports (ecsreports)

# Post Visit: Follow Up Claim Submission Tools

Electronic Claim Responses in Correct Mistakes (oops)

	DATE	PATIENT	PROCEDURE NAME	DIAG	P	AMOUNT	SUM DUE
1)	12/22/09	Pebbles	Well Child 5-11 yrs	V20.2	Y	195.00	0.00
2)		01/26/10	Ins Pmt HUM #0000		Y	115.56	
3)		01/26/10	Ins Adj HUM #0000		v	64 44	
4)		01/15/10	Payor Acknowledged Claim	#33537	0:	Your clai	m has be
5)	(	01/15/10	PCC Acknowledged Claim #	335370:			)
6)		01/15/10	HUMANA ECS #335370				
7)		01/15/10	Claim (Irom HUMANA) to A	VALLITY	num	ana	
8)		01/14/10	HUMANA claim batched by	oops			
9)		12/22/09	TOS Cash Payment		Y	15.00	

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





#### Post Visit: Claim Submission

EDI Reports (ecsreports)

EDI Reports - Listing A	ll Report T	Types	
1422 files are listed below.			Times Printed
05/20/2013			Frinced
ECS Batch Log	ECS	2:33pm	0
preptags/tagsplit Bad Claims	ECS	2:31pm	
Post-N-Track Claim Acknowledgment Report		1:15pm	
ERA/EOB Report	ERA/EOB	11:15am	
ERA/EOB Report	ERA/EOB	8:45am	0
Emdeon Provider Claim Status	ECS	4:00am	0
05/19/2013			į
Post-N-Track Claim Acknowledgment Report		1:15pm	
_ ERA/EOB Report	ERA/EOB	11:15am	
_ ERA/EOB Report	ERA/EOB	11:15am	
Availity Electronic Batch Report	ECS	5:45am	0
Availity Electronic Batch Report	ECS	5:45am	0
Emdeon File Status Report	ECS	4:00am	0
Emdeon File Summary Report	ECS	4:00am	0
Emdeon File Detail Summary Report	ECS	4:00am	0
PCC Daily Submission Summary	ECS	1:30am	0
		earch Searc Lected Recen	



#### Post Visit: Claim Submission

 To learn more about EDI reports attend Justin and Phil's Read and Understand Your EDI Reports class on Thursday at 10:45am!

## Post Visit: Payment Posting

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

What's FRA?

• What's EFT?

- ERA is not EFT
  - Most payers allow receipt of either or both
  - Some payers require both
  - Partner doesn't facilitate processing of EFT

#### 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

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/ F	Personal Other	Total PersDue	Contractual Adjust	Other Adjust	Payment
SONGER, KATHY	(Ins ID: U30	999999)	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



- How does ERA benefit you?
  - Standardization of presentation format/layout
  - ERA is generally delivered more quickly than a paper/mailed EOB
  - ERA is required for automatic payment posting

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



#### 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



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



	Autopost - ER	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	
	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	444449	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	1100000001	471.59	
07/29/09	Total Health Complete	22200001	271.25	
	Kingsland Crowns	42	105.38	
07/29/09	Wassalla National Health	88888881	119.96	
Post Payments	Select Select View & None Post	Not Yet Printed		



- 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



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

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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



- 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



- 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

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



- 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/



#### 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

- How do I get started with autoposting?
  - 1.Register to receive ERA from Partner's supported payers 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



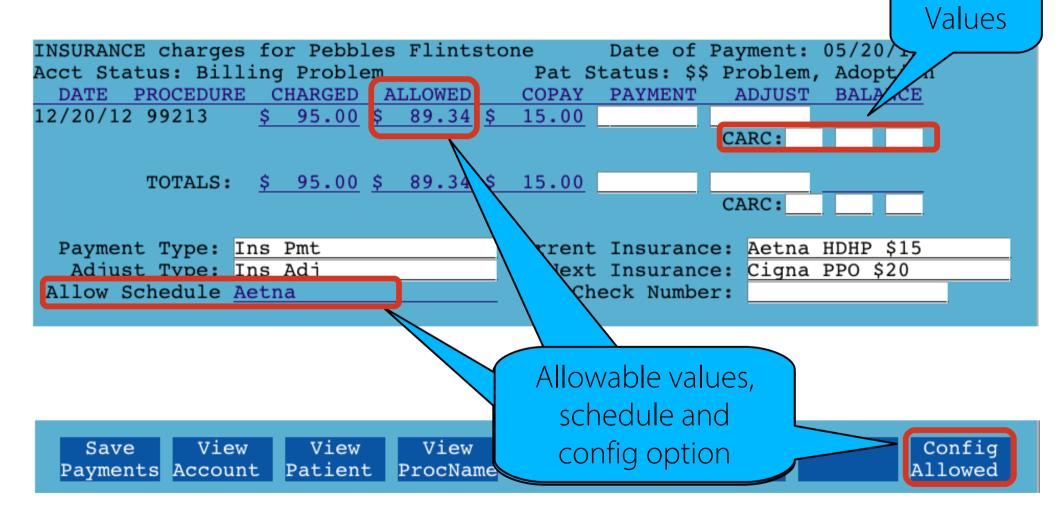
## Post Visit: Payment Posting erareports

		ERA	Reports			
	Date	Payor	Check#	Chec	k Amount	Autoposted
X	07/29/09	Healthier United	432143214321	\$	241.98	
Г	07/29/09	Healthier United	321432143214	Ş	0.00	
П	07/29/09	Healthier United	213214321432	\$	119.96	
П	07/29/09	Sergeant Hartford	987698769	\$	105.38	
П	07/29/09	Sergeant Hartford	876987698	\$	271.25	
	07/29/09	Altma	03210321032	\$	471.59	
П	07/29/09	Altma	32103210321	\$	77.73	
П	07/29/09	Altma	21032103210	\$ \$	47.69	
П	07/29/09	Altma	10321032103	\$	128.29	
П	07/29/09	Altma	03210321033	\$	75.95	
П	07/29/09	Cactus Prickle	444449	\$	67.28	
П	07/29/09	Sergeant Hartford	565656560	\$	110.19	
П		Sergeant Hartford	565656561	\$	102.00	
П		Sergeant Hartford	565656572	\$	73.00	
П		Sergeant Hartford	565656591	\$	91.00	
	07/29/09		11000000001	\$	61.00	
		Total Health Complete	222000001	\$	57.69	
H		Kingsland Crowns	42	\$	32.54	
H		Wassalla National Health	88888881	s	51.14	
	Manual Report	Auto Full Jump To Report Report Date	Search			



- Posting insurance payments manually, aka pip
  - Payment/Adjustment types to track denials
  - CARC fields can be configured to appear
  - Insurance Allowables / Fee Schedules







CARC

#### Post Visit: Follow Up

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

#### Post Visit: Corrections

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

### Post Visit: Follow Up Partner Tools

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



### Post Visit: F/U Partner Tools maketags

ONLY for special circumstances

	RESUBMIT CLAIMS
	Age of Charges:  45 or more days old from 45 to 90 days old X for dates from 05/21/12 through 05/20/13
	Charges to Resubmit:  X Only Unpaid, Pending Charges Only Unpaid Charges, Pending or Personal All Charges, Paid or Unpaid, Pending or Personal
	Which Insurance Plans:  X Many Plans Just One Plan:
	All Providers: Yes
	NOTE: the above criteria will be ignored when using F5 (SRS).
	Include entire visits: No
Find Claims	Restrict with SRS



### Post Visit: F/U Partner Tools insaging

Use to find insurance companies not paying timely

					•		
Insurance Company Aging	Report -	All Prov	Providers 05		13		
Ins Group	Current	30-59	60-89			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				143		2,727	2
Total	62,765			2,499	66,480	154,865	
Percentage	41%	11%	3%	2%	43%		



#### 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

### Post Visit: F/U Partner Tools inscoar

```
INSCOAR INTERACTIVE SCREEN
      Use the PgUp and PgDn keys to scroll through this information.
                                                         TOTAL: $
                                                                     543.00
    ACCOUNTS WITH BALANCES PENDING Health America HMO $10/20 ()
Moyer, Donald J. (#1372)
PARTNER: Mover, Donald J.
  Moyer, Jeremy (#2512) (09/30/12) (ID: 850435296-03, Grp: Moy665)
    12/08/2012 O DTaP
                                           90700
                                                   V06.1 0 $
                                                                      45.00
                12/08/12 Health America claim batched
                12/09/12 Claim (from Health America) to PROXYMEDhamerica
    12/08/2012 O HepB/Hib
                                                   V06.8 O $
                                                                      80.00
                                           90748
                12/09/12 Health America claim batched
                12/10/12 Claim (from Health America) to PROXYMEDhamerica
                                                                     125.00
                           WorkWith
           Hide
                                                           Previous
  Show
                                           New
                                                    Next
                                                                     Bop To
MoreInfo MoreInfo
                            Entry
                                         Pattern
                                                   Match
                                                            Match
                                                                      Top
```



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

- Billing & Collections
  - 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.



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

- Billing & Collections
  - Claim Error Report

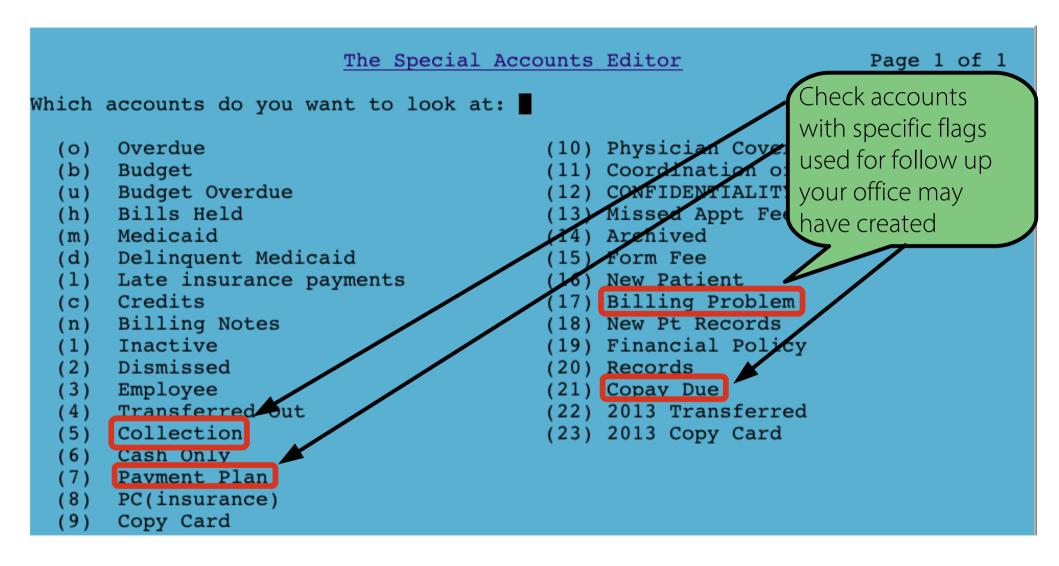
•		Proxymed/Emde	on Claims)							
Responsible Party Group: Private Insurance Current Billing Status: Tagsplit Error/Rejection										
					_					
Acct Acct Last Name	Acct First Name	Pat Pat First Name	Date of Current Billing Status	Current Billed Message	Transaction Date	Charge Amount	Amount Due			
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 G										
Current Billing Statu Acct Acct Last Name			Date of Current Billing Status	Current Billed Message	Transaction Date	Charge Amount	Amount Due			
Acct Acct Last	ıs: Tagsplit Erroi Acct First	/Rejection Pat Pat First	Current Billing				Amount Due \$15.00			
Acct Acct Last Name	is: Tagsplit Erroi Acct First Name	-/Rejection Pat Pat First Name	Current Billing Status	Message  Claim (from HealthyKids	Date	Amount				
Acct Acct Last Name 428 Keller	s: Tagsplit Error Acct First Name Alan	Pat Pat First Name 2429 Thomas	Current Billing Status 07/05/12	Claim (from HealthyKids HMO) to Error Claim (from HealthyKids	Date 01/28/12	\$15.00	\$15.00			



### Post Visit: Follow Up Partner Tools

- Allowables
  - allowedit
  - srs
- Allowable Overpayments Report
- Allowable Underpayments Report
- Attend the Tracking Allowables course today at 3pm to see how to setup your allowable / fee schedules and let Partner track under and over payments for you automatically!

### Post Visit: F/U Partner Tools cfs





### Post Visit: Follow Up

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

### Post Visit: F/U

- Challenges:
  - Variety of plans covering your families
  - Coding requirements
  - Ever-changing payer 'rules'
  - Claims submission address changes

### 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

### 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



### Post Visit: F/U Denial Management

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



# Post Visit: F/U Appeals

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

### 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

### 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
    - Reference numbers



#### Post Visit: Personal Collections

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

### Post Visit: bills/ebills

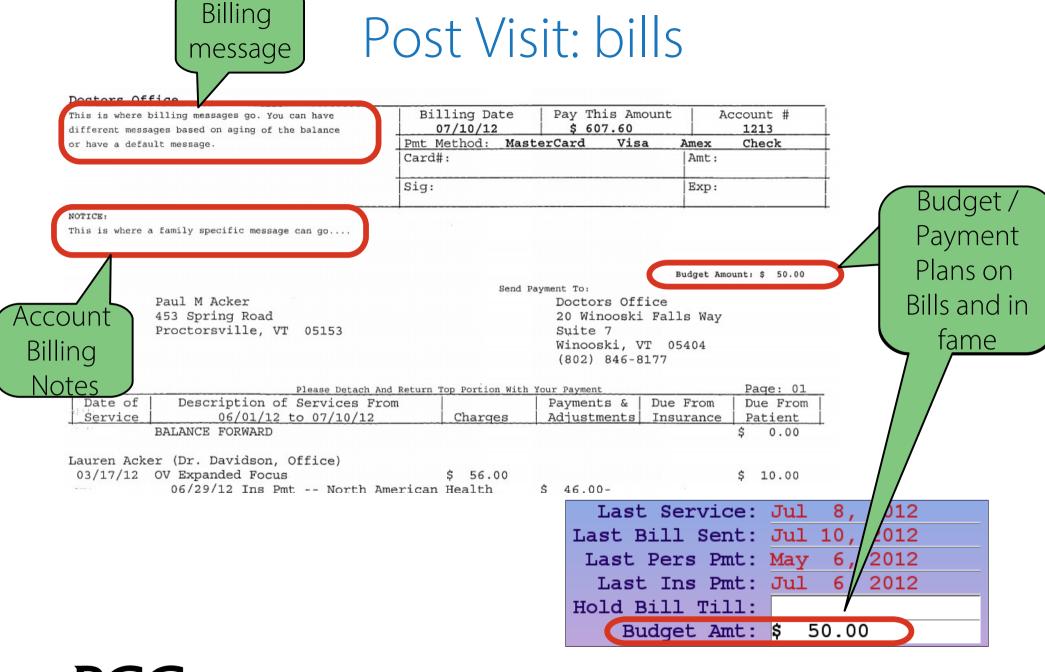
- Personal bills
  - ebills vs bills
  - Cycle billing
  - Billing messages
  - Finding bills sent in the past

### Post Visit: bills/ebills

#### ebills vs bills

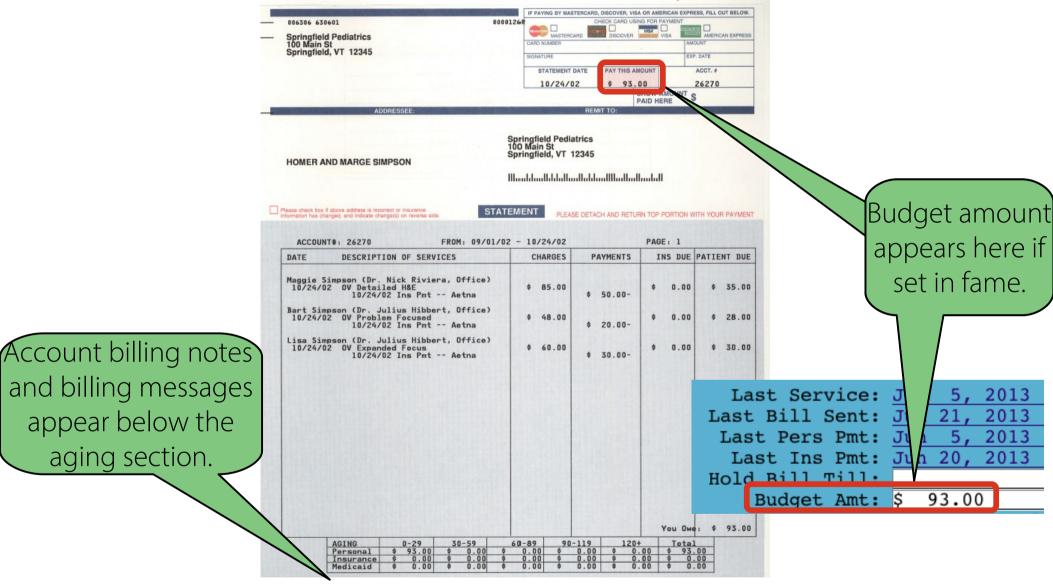
- Look more professional
- Submit electronically
- Cost per bill
  - \$.79366 first page
  - \$.2235 each addt'l page

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





# Post Visit: ebills/RelayHealth





# Post Visit: Cycle Billing

- Sending out bills weekly instead of monthly
  - Personal payments come in all month

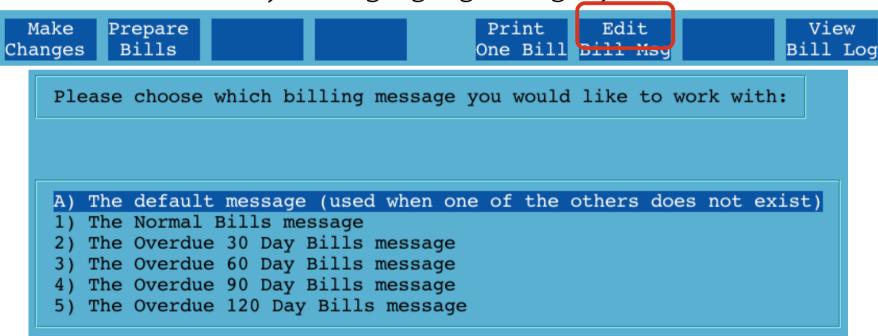
- Manual cycles
  - Breaking up bills

# Post Visit: Cycle Billing

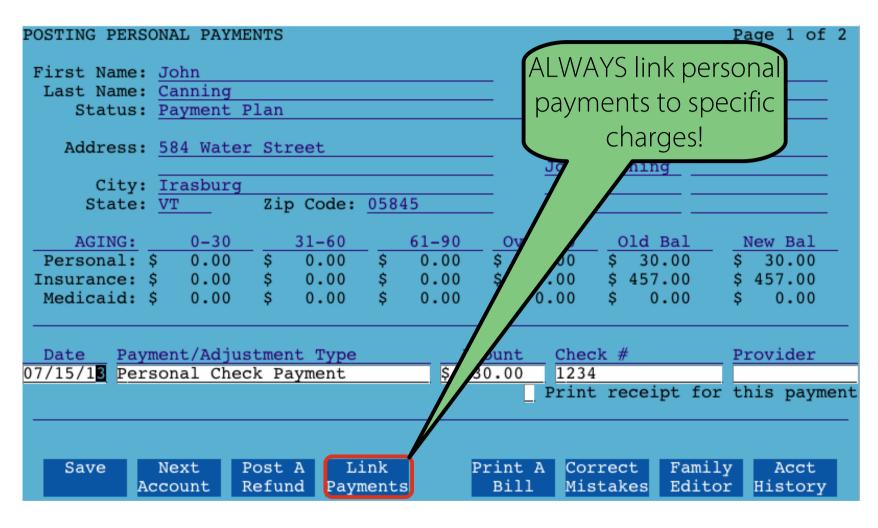
- Partner Cycle Billing
  - Set your cycle to 28 days
  - Run bills weekly
  - When does an account get a bill?

### Post Visit: Billing

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



# Post Visit: Posting Personal Pmts



### Post Visit: Billing

Account Billing Notes

Use cfs to track which accounts have account billing notes

```
The Special Accounts Editor

Which accounts do you want to look at:

(C) Credits

(n) Billing Notes

(18) New Pt Records

(19) Financial Policy
```



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





			Bill Log -	Bill Batch I	Listing	
	Date	Who	Date Range	Zip Range	Alphabet Range	Bill Agings
Χ	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	-	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	-	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	-	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				
	Billed	NotBilld				



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

```
Bill Log - Listing of Accounts Billed
                            Bill Amount
  Name
                            $ 147.00
X Achey, Jeremy
 Acker, Paul M
                             639.60
 Acord, Nancy
                              20.00
 Adam, Scott L.
                              52.00
 Addington, Jeffrey
                             207.00
    View
                              Sort By
                                             Sort By
    Bill
                                Name
                                              Amount
```



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

```
Bill Log - Accounts Not Billed
                                                           is not billable.
                        (#100000)
                                     Total bal $
Account, Test
                                                    0.00
                                                 0.00
                                     Total bal $
                                                           is not billable.
Acker, Patricia
                        (#28)
Adams, Ambrocio
                        (#1962)
                                     Total bal $ 0.00
                                                           is not billable.
Adams, Herb
                        (#1348)
                                  Personal bal $
                                                 3.26
                                                           below cutoff $
                                                                            4.99.
Beltz, Christopher
                                     Total bal $ 26.81CR is not billable.
                        (#671)
Catalani, John
                        (#1092)
                                  Flag #4 held bill.
```

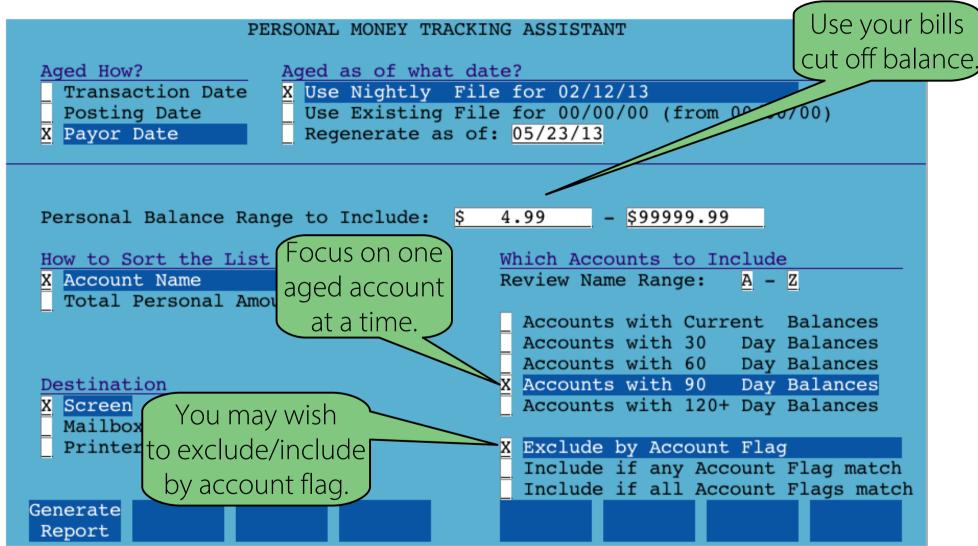


- Accounts Not Billed
  - See who did not receive a bill
  - Includes why they did not receive one

```
Bill Log - Accounts Not Billed
                                     Total bal $
                                                          is not billable.
Account, Test
                        (#100000)
                                                   0.00
Acker, Patricia
                        (#28)
                                     Total bal $ 0.00
                                                          is not billable.
                                     Total bal $ 0.00
Adams, Ambrocio
                        (#1962)
                                                          is not billable.
Adams, Herb
                        (#1348)
                                  Personal bal $ 3.26
                                                          below cutoff $
                                                                            4.99.
Beltz, Christopher
                                     Total bal $ 26.81CR is not billable.
                        (#671)
Catalani, John
                        (#1092)
                                  Flag #4 held bill.
```



### Post Visit: persview

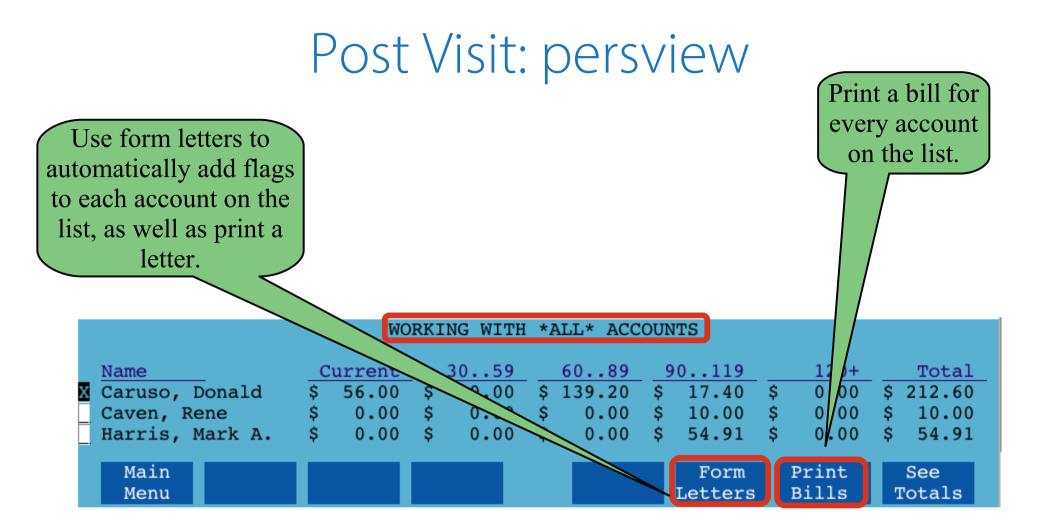




# Post Visit: persview

	WORKI	NG V	VITH *IN	DIV	IDUAL*	ACC	OUNTS	
Name	Current		3059		6089	9	0119	120+ Total
Achey, Jeremy	\$ 56.00	\$	0.00	\$	0.00	\$	0.00	\$ 0.00 \$ 56.00
Acker, Paul M	\$ 500.00	ş	102.00	ş	0.00	Ş	0.00	\$ 0.00 \$ 607.60
_ Acord, Nancy	\$ 0.00	\$	0.00	\$	0.00	\$	0.00	\$ 20.00 \$ 20.00
Adam, Scott L.	\$ 0.00	\$	52.00	\$	0.00	\$	0.00	W71 - W7'-41 - A 11 1 -4 -
Adams, Herb	\$ 0.00	\$	0.00	\$	0.00	\$	0.00	Work With All lets
Addington, Jeffre	•	\$	0.00	\$	0.00	\$	0.00	you run commands
Aftos Many funct	tion keys	\$	0.00	\$	0.00	\$	0.00	for each account
- Albert to help you	ı review	\$ \$	0.00	\$	0.00	\$	0.00	\$ 10.00 0
ALCIAI.	_	\$	0.00	\$	0.00	\$	0.00	\$ 76.00 \$ 0
each accou	int from		0 00	,	0 00	_	0 00	â 303 00 â
Alvian one prog	gram. 🌋	_	0.00	۶	0.00	\$ \$	0.00 1.80	\$ 293.00 \$ 00 \$ 43.20 \$ 96
Andrews, Josephin	\$ 0.00	9		?	0.00	9	0.00	\$ 43.20 \$ .96 \$ 150.00 \$ 1 .00
_ Andrews, Josephin	0.00		0.00	<u> </u>	0.00	٧	0.00	\$ 150.00 \$ 1
Angle, Wenshing	9 0.00	\$	0.00	3	0.00	4	0.00	\$ 30.00 \$ .00
Annunziata, Kimbe			0.80	\$	0.00	\$	00	\$ 92.00 \$ 2.00
Archer, Brad	\$ 0.00	Ġ	0.00	\$	0.00	\$	0.00	\$ 112.00 \$ 1 2.00
				A				V
Main Edit	Refund	I	?am		Dayshe		Form	Print Work
Menu Account					Histor	У	Letters	One Bill With All



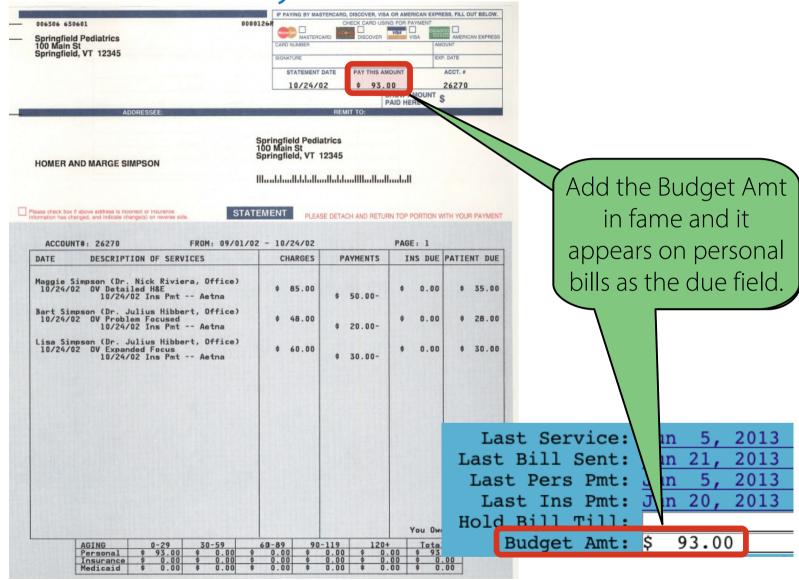




# Post Visit: Payment Plans

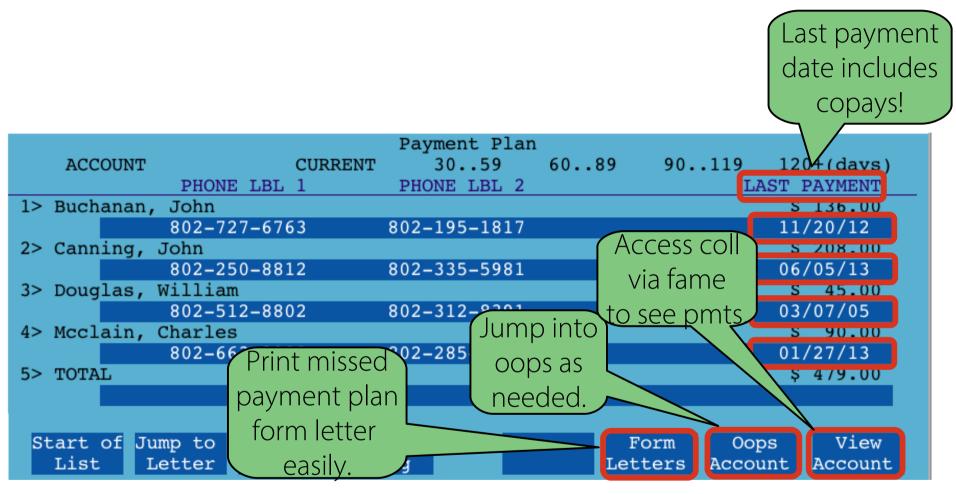
- Setting up a payment plan
  - Create a form letter explaining their responsibilities
  - Update the Budget field in fame
  - Give them a flag so you can easily review the accounts on a payment plan to verify they are paying

# Post Visit: Payment Plans





#### Post Visit: Payment Plans



# 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!

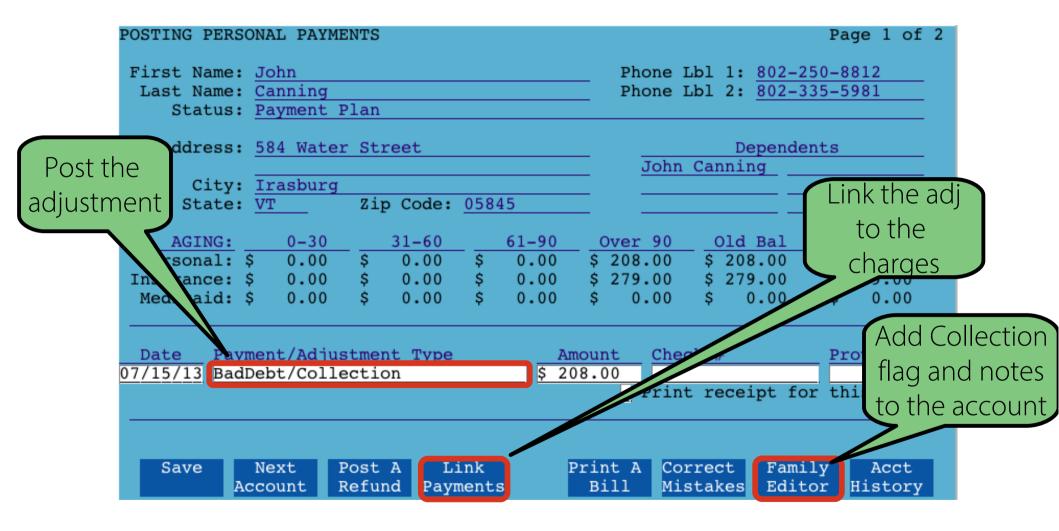
#### Post Visit: Collections

- 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

# 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

# Post Visit: Collections - Adjust Charges





# 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.
  - Post a "Collection Income" adjustment in the refund program and then post a Collection Payment against that adjustment using pam.

#### Post Visit: Collections - Pend Agency

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

#### Post Visit: Collections - Pend Agency

- Partner configuration needed for this option
  - Add "Collection" as an insurance group
  - Adding "1. Collection Agency" as an insurance company
- 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



# Post Visit: Collections - Pend Agency

ITEM	DATE	PATIENT	PROCEDURE NAM	ME DIAG	SVC BII	AMOUNT	SUM DUE
437	20/20/12			1100			
	08/06/12		Well Child 5-			95.00	95.0
45)			Claim (from Othe		s		
46)			Other claim bate				
47)			Respiratory I			28.00	28.00
48)		08/07/12	Claim (from Othe	er) to enbcb	s		
49)		08/06/12	Other claim bate	ched			
50)		John	Spirometry Si			70.00	70.00
51)		08/07/12	Claim (from Othe	er) to enbcb	s		
52)		08/06/12	Other claim bate	ched			
53)		P John	Same	737.30	C C	0.00	0.00
54)		08/07/12	Claim (from Othe	er) to enbcb	s		
55)			Other claim bate				
56)	01/30/12	C John	OV Expanded I		G G	56.00	0.00
57)		03/06/12	Ins Pmt Direct I			42.00	Hit F4 t
58)			Ins Adj Direct H			4.0	
59)			Claim (from BCBS				pend to
		02,01,12	0141111 (110111 2021	, 66 2622			•
Per	csonal: \$	208.00 Corr	ecting John Cann	ning (# 1).			new collection
	rance: \$		re are 189 more				
Mod	dicaid: \$		ie die 105 more	CCMD.			agency ir
charges   The charges	ircuru. y	0.00					
	np to Ger	nerate SeeClai	Inguranc	Visit Un	link & V	liew Adi D	elete
	•		ll Status		elink F		
	. celli C	Kpc/BI	Status	Status	errik F	teasons It	em(s)



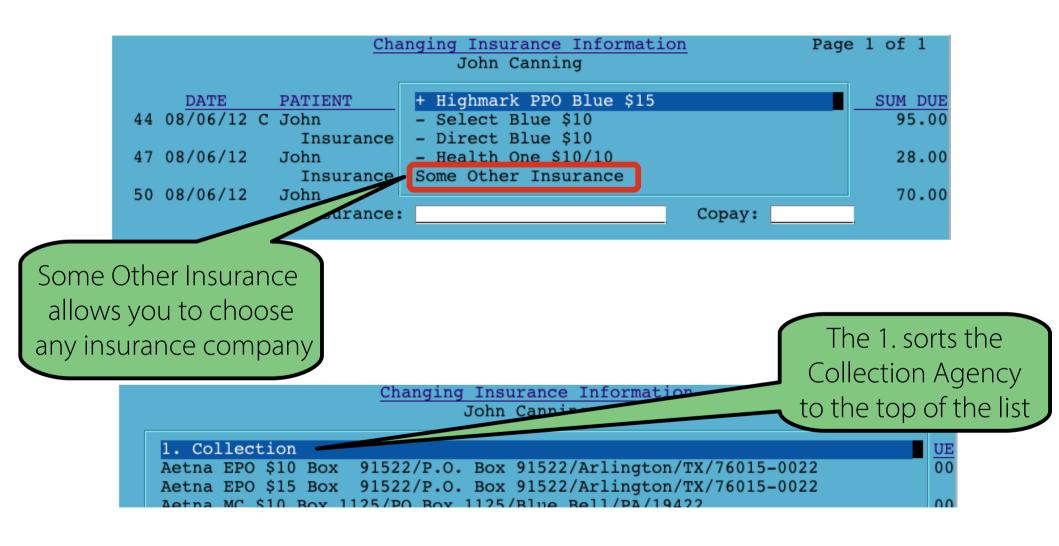
# Personal Collections Post Visit - Collections: Adjust Charges

TEM	DATE		PATIEN	T	PROCEDURE	NAME	DIAG	SVC	BIL	AMOUNT	SUM DUE
1	0/20/12		10/20	/12 U	ther craim						
44) 0	8/06/12	C	John		Well Chil	d 5-11	y V70.0	С	С	95.00	95.00
			08/07	/12 C	laim (from	Other)	to enbcb	s			
$\rightarrow$			08/06	/12 0	ther claim	batched	i				
47)					Respirato				С	28.00	28.00
7					laim (from			s			
$\rightarrow$					ther claim						
50					Spirometr				С	70.00	70.00
/					laim (from			s			
)				/12 0	ther claim						
53)		Р	John	/10 0	Same				С	0.00	0.00
					laim (from			s			
56) 0	1/30/12				CHEL CIAIM			<u> </u>	C	56.00	0.00
20) 0	1/30/12				OV Expand ns Pmt Dire					42.00	0.00
,					ns Adj Dire					4.00	
,					laim (from					4.00	
,			02,01	, 12 0	TOTIL (TIOM	DCDD, C	O DODD				Тур
Pers	onal: \$	20	8.00	Corre	cting John	Canning	ı (# 1).				
	ance: \$				are 189 mo						num
	caid: \$				item number			7 50			the
	•										
											go
	•										col



Control Your Future™

#### Post Visit: Collections - Pend Charges





# Post Visit: Collections - Pend Charges

<u>C</u>	Page 1 of 1			
DATE PATIENT	PROCEDURE NAME DIAG	SVC BIL	AMOUNT	SUM DUE
44 08/06/12PC John	Well Child 5-11 vr V70.0	CC	95.00	95.00
Insuranc	e; 1. Collection	Copay: \$	15.00	
47 08/06/12P John	Respiratory Flow V 493.8	1 C C	28.00	28.00
Insu	e: 1. Collection	Copay:		
50 08/06/12P John	Spirometry Simple 493.8	1 C C	70.00	70.00
urano	e: 1. Collection	Copay:		

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



#### Post Visit: Collections - Pend 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



#### 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

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

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

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

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

#### Front Desk & Back Office

- Questions?
  - At 3pm this afternoon head to the Collection Roundtable for more discussion.

# Front Desk & Back Office learn.pcc.com

- Click on Partner
  - Click on Insurance Billing
    - http://learn.pcc.com/Content/Partner/Insuran ceBilling/InsuranceBillingIntro.htm

- Click on Personal Billing
  - http://learn.pcc.com/Content/Partner/Person alBilling/PersonalBillingIntro.htm



#### Post Visit: Follow Up

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