

Insurance Collections

Lynne Y Gratton, CPPM
PCC 2016 Users' Conference



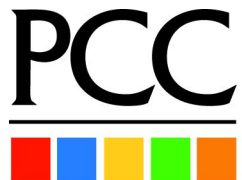
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Insurance Collections

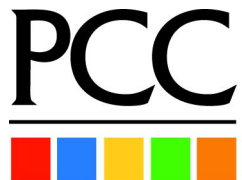
Overview

- Take Away
- Configuration
- Pre Visit
- Claims submission
- Posting payments / responses
- Claims follow up
- Claim submission tools and reports



Insurance Collections

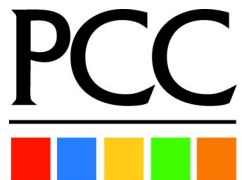
- What is the Take Away?
 - Learning the importance of the front desk and back office working together to collect money.
 - Tools to help



Insurance Collections

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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Insurance Collections Configuration

- Insurance Plans
- checkout screens
- Snap codes
- Billing Office Prep

Insurance Collections Configuration: Insurance Table

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



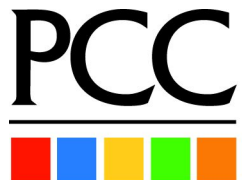
Insurance Collections Configuration: checkout screens

- checkout screens
 - Setup using Charge Screen Editor (csedit)
 - Can vary by visit reason, place of service, and/or provider
 - Setup form fee posting
 - Setup hospital posting
 - Hospital vs. newborn hospital



Insurance Collections Configuration: Snap Codes

- SNAP Code Table
 - Use 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) or used on the fly

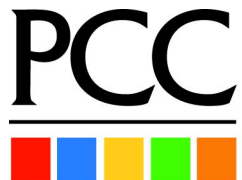


Insurance Collections Configuration: Billing Office Prep

- 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.

Insurance Collections Pre Visit

- Scheduling
- Appointment Verification
- Eligibility Verification
- Eligibility Using Partner



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Insurance Collections Pre Visit: Scheduling

SAM Search Criteria

| Name | Visit Reason | PCP | Provider |
|----------------------|--------------|-----|----------|
| X Pebbles Flintstone | | W | |

Time Frame:

PATIENT: Pebbles Flintstone PAT STATUS: \$\$ Problem, Adopti LAST PHYS: 05/01/12
DOB: 04/24/2003 CUST STATUS: CONFIDENTIAL NEXT APPT:
AGE: 10 years GUAR STATUS: Billing Problem

Flintstone GUAR: Fred Flintstone
erry Lane 1400 Rock Road
VT 05404 Winooski, VT 05404

H: 802-555-0194 BAL: \$ 37.00 H: 802-555-0105 PERS BAL: \$ 37.00
W: 802-555-0197 INS BAL: \$ 128.00 W: 802-555-0146 INS BAL: \$ 128.00

PRI: Aetna HD \$15 PT: 34DFJH GRP:
SEC: Cigna PPO \$2 CERT: 14958JD GRP:

School: Bedrock Central SSN: 828-74-6104
Alt Name: Rubble Chart #: 2755

MISS: 1 (12/18/12, Pebbles, Sick Call) CANC: 1 (02/11/07, Pebbles, Sick Call)

Schedule Inquire Find Next Relation Demo-graphics Clear

Use flags to communicate with the front

Take advantage of available function keys



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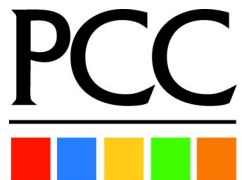
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Pre Visit: Scheduling

Partner screens
are now 30
lines long, so
take advantage
of those 5 lines!

| SAM Search Criteria | | | | | |
|---|--------------------|----------------------------------|--------------------|---------------------|-------|
| Name | Visit Reason | PCP | Provider | Mins | L |
| X Pebbles Flintstone | | W | | | 0 |
| Time Frame: <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> | | | | | |
| PATIENT: Pebbles Flintstone | | PAT STATUS: Adoption, ~\$\$ Prob | | LAST PHYS: 05/29/15 | |
| DOB: 05/21/2006 | | CUST STATUS: CONFIDENTIAL | | NEXT APPT: | |
| AGE: 10 years | | GUAR STATUS: Billing Problem | | | |
| CUST: Wilma Flintstone | | GUAR: Fred Flintstone | | | |
| 15 Quarry Lane | | 1400 Rock Road | | | |
| Winooski, VT 05404 | | Winooski, VT 05404 | | | |
| H: 802-555-0194 | PERS BAL: \$ 37.00 | H: 802-555-0105 | PERS BAL: \$ 37.00 | | |
| W: 802-555-0197 | INS BAL: \$ 128.00 | W: 802-555-0146 | INS BAL: \$ 128.00 | | |
| PRI: Aetna HDHP | | CERT: 34DFJH | | GRP: | |
| SEC: Cigna PPO \$20 | | CERT: 24958JD | | GRP: | |
| School: Bedrock Central | | SSN: 828-74-6104 | | | |
| Alt Name: Rubble | | Chart #: 2755 | | | |
| PAT STATUS: Adoption, ~\$\$ Problem | | | | | |
| CUST STATUS: CONFIDENTIAL | | | | | |
| GUAR STATUS: Billing Problem | | | | | |
| MISS: 1 (01/15/16, Pebbles, Sick Call) CANC: 1 (03/10/10, Pebbles, Sick Call) | | | | | |
| Schedule | Inquire | Find | Next Relation | Demo- graphics | Clear |



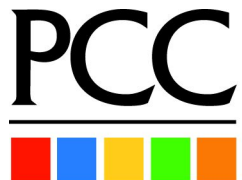
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Pre Visit: Scheduling

- 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



Insurance Collections

Pre Visit: Eligibility

- Partner's elig program
 - Auto eligibility overnight
 - Now for all active plans!
 - Update policy information as needed through elig, especially **copays!**
 - Use notes for the front desk to see at checkin



Insurance Collections

Pre Visit: Appt Verification

- 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!!!



Insurance Collections

Claims Submission: Clean Claims

- Always link diagnoses to procedures
- Certified coder on staff
- Train staff on basic coding scenarios
- Use SNAP codes to reduce missed procedures
- Setup the EEF on the EHR to select the proper CPT codes for orders.

Insurance Collections

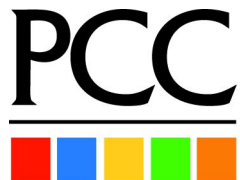
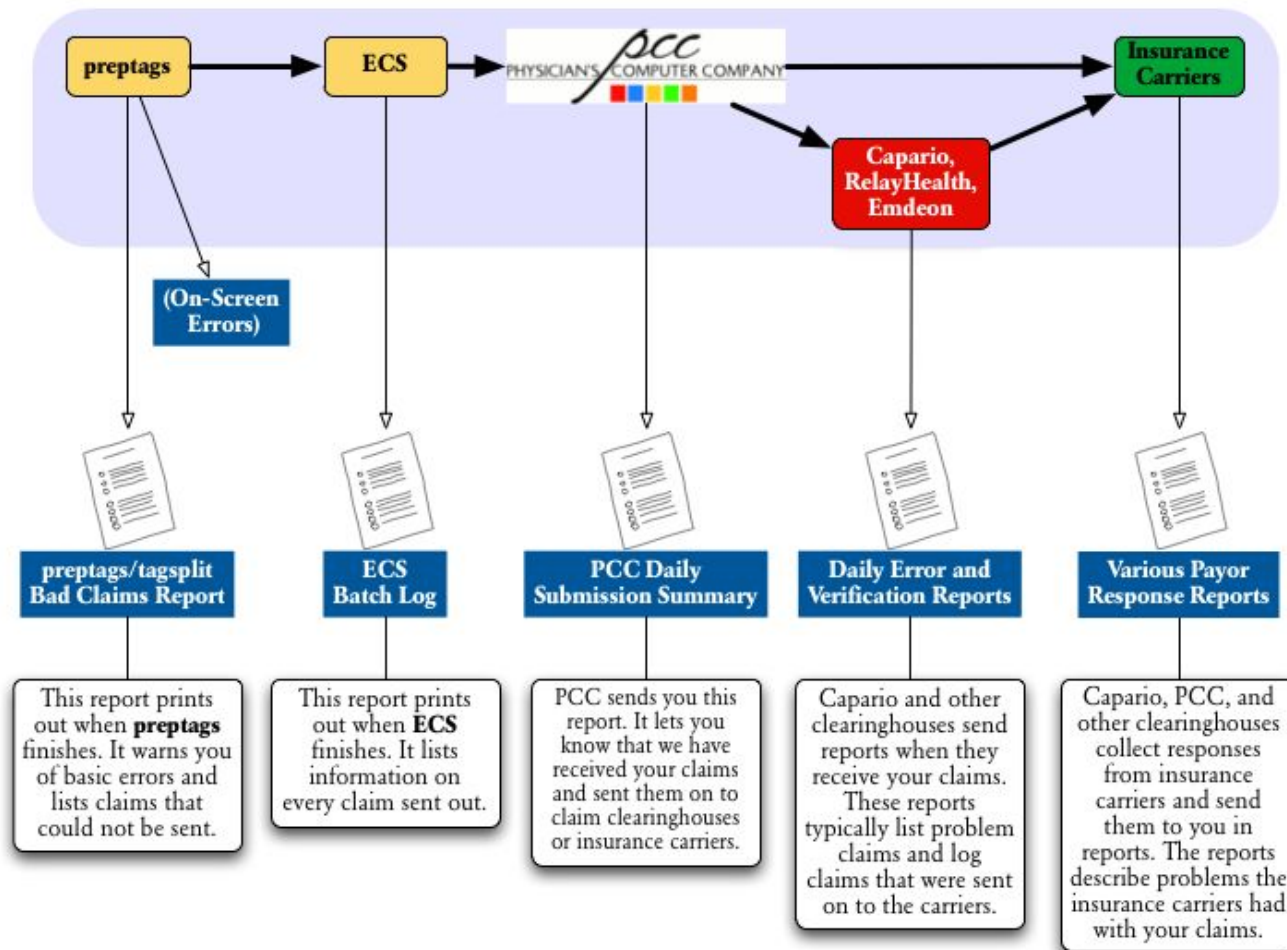
Claims Submission: Clean Claims

- Verifying quality claims before submitting
 - Daysheet Postings Check (dailycheck)
 - Changing insurance after charges are posted
 - Adding modifiers on the fly in oops!
- Pre-authorization / Referral requirements



Insurance Collections Claims Submission

Reports You Receive As Your Claim is Processed



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Insurance Collections Claims Submission: Responses

- pretags
- Bad Claims Report
- Sample pretags Bad Claim Report Error

Date: 07/11/16 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

Date: 07/11/16 PCC #: 12345 Patient: Bart Simpson
Guar PCC#: 54321 Cus PCC#: 54321
Procedure Code: ABCDE Diagnosis code: Z23 Amount: \$ 10.00
The procedure code "ABCDE" is obsolete for the date of service.

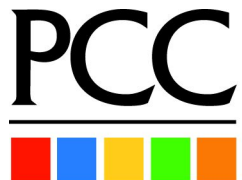
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Claims Submission: Responses

- 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

Insurance Collections Claims Submission: Responses

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



Insurance Collections

Claims Submission: Responses

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 | | Y | 64.44 | |
| 4) | | 01/15/10 | Payor Acknowledged Claim #335370: Your claim has be | | | | |
| 5) | | 01/15/10 | PCC Acknowledged Claim #335370: | | | | |
| 6) | | 01/15/10 | HUMANA ECS #335370 | | | | |
| 7) | | 01/15/10 | Claim (from HUMANA) to AVAILITYHUMANa | | | | |
| 8) | | 01/14/10 | HUMANA claim batched by oops | | | | |
| 9) | | 12/22/09 | TOS Cash Payment | | Y | 15.00 | |

Use the <F3> See Claim Rpt/Bill function key to access the claim responses (e.g. lines 4, 5, and 6)

SeeClaim
Rpt/Bill



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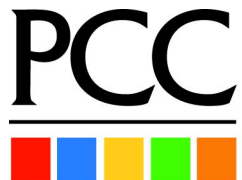
Claims Submission: ecsreports

| EDI Reports - Listing All Report Types | | | | |
|---|--|---------|---------|---------------|
| 1422 files are listed below. | | | | |
| | | | | Times Printed |
| 05/20/2013 | | | | |
| <input type="checkbox"/> | ECS Batch Log | ECS | 2:33pm | 0 |
| <input type="checkbox"/> | preptags/tagssplit Bad Claims | ECS | 2:31pm | 0 |
| <input type="checkbox"/> | Post-N-Track Claim Acknowledgment Report | ECS | 1:15pm | 0 |
| <input type="checkbox"/> | ERA/EOB Report | ERA/EOB | 11:15am | 0 |
| <input type="checkbox"/> | ERA/EOB Report | ERA/EOB | 8:45am | 0 |
| <input type="checkbox"/> | Emdeon Provider Claim Status | ECS | 4:00am | 0 |
| 05/19/2013 | | | | |
| <input type="checkbox"/> | Post-N-Track Claim Acknowledgment Report | ECS | 1:15pm | 0 |
| <input type="checkbox"/> | ERA/EOB Report | ERA/EOB | 11:15am | 0 |
| <input type="checkbox"/> | ERA/EOB Report | ERA/EOB | 11:15am | 0 |
| <input type="checkbox"/> | Availity Electronic Batch Report | ECS | 5:45am | 0 |
| <input type="checkbox"/> | Availity Electronic Batch Report | ECS | 5:45am | 0 |
| <input type="checkbox"/> | Emdeon File Status Report | ECS | 4:00am | 0 |
| <input type="checkbox"/> | Emdeon File Summary Report | ECS | 4:00am | 0 |
| <input type="checkbox"/> | Emdeon File Detail Summary Report | ECS | 4:00am | 0 |
| <input type="checkbox"/> | PCC Daily Submission Summary | ECS | 1:30am | 0 |
| <div> <div>View Selected</div> <div>Print Selected</div> <div></div> <div>Select None</div> <div>Essentl Reports</div> <div>Search Selected</div> <div>Search Recent</div> <div>List By Type</div> </div> | | | | |



Insurance Collections Claims Submission: Mastering Claim Reports

Check out **Justin and Scott's Mastering Claims Reports** class Friday at 10:15am for more on EDI reports from PCC, clearing houses, and payers.



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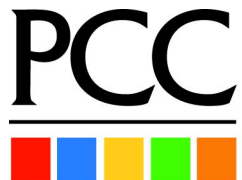
Insurance Collections Payment Posting

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



Insurance Collections Payment Posting

- What's ERA?
- What's EFT?

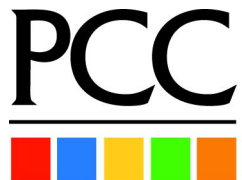


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Insurance Collections Payment Posting

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



Insurance Collections Payment Posting

- Sample ERA

| | |
|-------------------------|-----------------------------|
| <u>Payer</u> | <u>Payee</u> |
| NEVADA SUPERIOR HEALTH | PAULI G LAGERS MD |
| P.O. BOX 182223 | # 112 |
| | 222 UNIVERSITY W BLVD |
| LAS VEGAS NV, 374227223 | 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 |

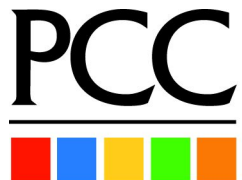


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Insurance Collections Payment Posting

- ERAs now contain the four Business Scenarios
 - Additional information required, missing/invalid / incomplete claim
 - Additional information required, missing/invalid/ incomplete documentation
 - Billed service not covered by health plan
 - Benefit for billed service not separately payable



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Insurance Collections Payment Posting

- 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



Insurance Collections Payment Posting: autopip

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



Insurance Collections Payment Posting: autopip

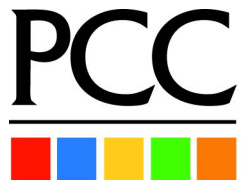
Learning to use autopip

- autopip and the autoposting process is documented at

<http://learn.pcc.com/>

- Our video tutorial is highly recommended!

<http://learn.pcc.com/help/auto-post-insurance-payments-video/>



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Insurance Collections Payment Posting: autopip

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

Insurance Collections 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 |

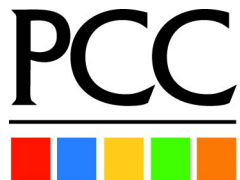
Post
Payments

Select
All

Select
None

View &
Post

Not Yet
Printed



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Insurance Collections Payment Posting: autopip

- Partner auto posting in a nutshell
 - autopip posts the claim payments it can
 - Claim payments which are not auto posted 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

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

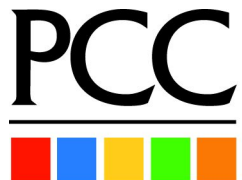
115. What is the default adjustment type for autopip? This will override PIP_DEFADJ is filled in.

Auto Ins Adj



Insurance Collections 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



Insurance Collections 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 auto-posting
 - Payments which do not match the corresponding Partner allowable value

Insurance Collections Payment Posting: autopip

- 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

Insurance Collections Payment Posting

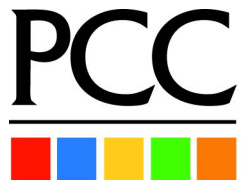
- Remittance Advice Remark Code (RARC) and Claims Adjustment Reason Code (CARC) Values

- 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/>



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Payment Posting: erareports

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



Insurance Collections Payment Posting: erareports

| ERA Reports | | | | |
|-------------|--------------------------|--------------|--------------|------------|
| Date | Payor | Check# | Check Amount | Autoposted |
| 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 | |
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| 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 | |

Manual
Report

Auto
Report

Full
Report

Jump To
Date

Search

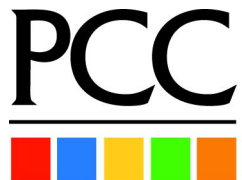


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Insurance Collections Payment Posting: erareports

- How do I get started with auto posting?
 1. Contact support! They will help you determine which of your payers have ERAs available and help you with any needed paperwork.
 2. Preview the <http://learn.pcc.com/> online documentation for Partner ERA and auto posting



Insurance Collections Payment Posting: pip

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

Insurance Collections Payment Posting: pip

INSURANCE charges for Pebbles Flintstone Date of Payment: 05/20/12
Acct Status: Billing Problem Pat Status: \$\$ Problem, Adoption

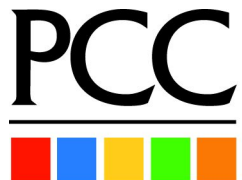
| DATE | PROCEDURE | CHARGED | ALLOWED | COPAY | PAYMENT | ADJUST | BALANCE |
|----------|-----------|----------|----------|----------|---------|--------|---------|
| 12/20/12 | 99213 | \$ 95.00 | \$ 89.34 | \$ 15.00 | | | |
| TOTALS: | | \$ 95.00 | \$ 89.34 | \$ 15.00 | | | |

Payment Type: Ins Pmt Current Insurance: Aetna HDHP \$15
Adjust Type: Ins Adj Next Insurance: Cigna PPO \$20
Allow Schedule Aetna Check Number:

CARC Values

Allowable values, schedule and config option

Config Allowed



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Insurance Collections Insurance Follow Up

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



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Insurance Follow Up: oops

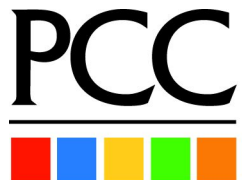
- oops vs. oosp vs. oops -k
 - oops: prompts for account name / PCC #
 - oosp: prompts for patient name / PCC #
 - oops -k: prompts for patient name / PCC#, but only shows that patient's charges instead of the entire family



Insurance Collections

Insurance Follow Up: oops

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



Insurance Collections

Insurance Follow Up: oops

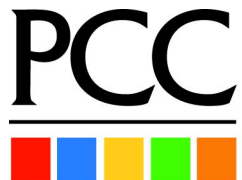
- oops
 - Recent Changes
 - Updating policies in oops
 - See the CPT code on the first screen
 - Visit based notes



Insurance Collections

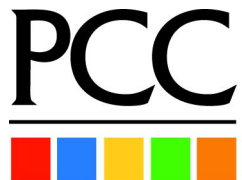
Insurance Follow Up: oops

- Recent Changes in oops
 - Generate Claim, Insurance and Visit Status possible by Claim ID or transaction date.
 - Original Claim Amount
 - Business Scenarios, in the ERA report



Insurance Collections Insurance Follow Up Tools

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



Insurance Collections Insurance Follow Up Tools

- ONLY for special circumstances

RESUBMIT CLAIMS

Age of Charges:

☐ 45 or more days old

☐ from 45 to 90 days old

☒ for dates from 05/21/12 through 05/20/13

Charges to Resubmit:

☒ Only Unpaid, Pending Charges

☐ Only Unpaid Charges, Pending or Personal

☐ All Charges, Paid or Unpaid, Pending or Personal

Which Insurance Plans:

☒ Many Plans

☐ Just One Plan:

All Providers:

NOTE: the above criteria will be ignored when using F5 (SRS).

Include entire visits:

Find Claims

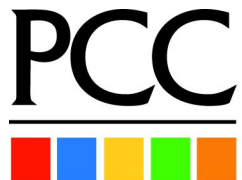
Restrict with SRS

Insurance Collections

Insurance Follow Up 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 Insurance Follow Up Tools

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



Insurance Collections Insurance Follow Up Tools

INSOAR INTERACTIVE SCREEN

Use the PgUp and PgDn keys to scroll through this information.

X

ACCOUNTS WITH BALANCES PENDING Aetna HDHP ()

Flintstone, Fred (#1980)

Flintstone, Dino (#3335) (03/29/12) (34DFJH)

01/16/2016 0 0V Expanded Focus 99213 372.30 D \$ 79.00

Visit Notes:

06/16/16 Here is my very important note tracking what I have d
insurance company about their lack of payment.

Billing History:

12/11/14 Aetna HDHP claim batched

01/17/15 Aetna HDHP claim batched by oops

03/21/16 Aetna HDHP HCFA #69 \$ 79.00

05/02/16 Aetna HDHP HCFA #105 \$ 79.00

Show MoreInfo

Hide MoreInfo

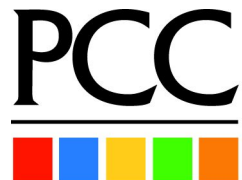
WorkWith Entry

New Pattern

Next Match

Previous Match

Bop To Top



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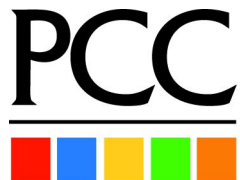
Insurance Collections Insurance Follow Up Tools

- 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 Insurance Follow Up Tools

- Billing & Collections
 - Claim Error Report

Claim Error Report (pretags/Proxymed/Emdeon Claims)



Responsible Party Group: Private Insurance

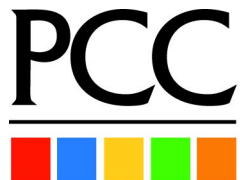
Current Billing Status: Tagsplit Error/Rejection

| 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 |



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Insurance Collections Insurance Follow Up Tools

- Allowables
 - allowedit
 - srs
 - Allowable Overpayments Report
 - Allowable Underpayments Report
- Learn more about this at learn.pcc.com

Insurance Collections

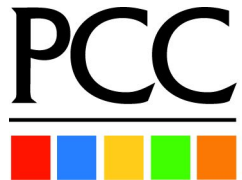
Insurance Follow Up Tools: cfs

The Special Accounts Editor

Which accounts do you want to look at: ■

- | | |
|-----------------------------|-----------------------------|
| (o) Overdue | (10) Physician Cove |
| (b) Budget | (11) Coordination o |
| (u) Budget Overdue | (12) CONFIDENTIALIT |
| (h) Bills Held | (13) Missed Appt Fee |
| (m) Medicaid | (14) Archived |
| (d) Delinquent Medicaid | (15) Form Fee |
| (l) Late insurance payments | (16) New Patient |
| (c) Credits | (17) Billing Problem |
| (n) Billing Notes | (18) New Pt Records |
| (1) Inactive | (19) Financial Policy |
| (2) Dismissed | (20) Records |
| (3) Employee | (21) Copay Due |
| (4) Transferred Out | (22) 2013 Transferred |
| (5) Collection | (23) 2013 Copy Card |
| (6) Cash Only | |
| (7) Payment Plan | |
| (8) PC(insurance) | |
| (9) Copy Card | |

Check accounts with specific flags used for follow up your office may have created

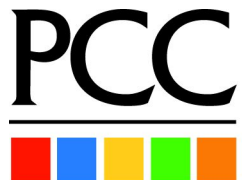


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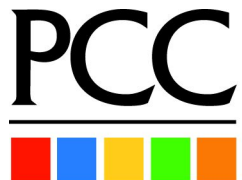
Insurance Collections Insurance Follow Up

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



Insurance Collections Insurance Follow Up

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



Insurance Collections Insurance Follow Up Tools

- Division of work load
 - By carrier
 - By task
 - Claims submission
 - Payment posting
 - Follow up on denials
 - Follow up on unpaid claims



Insurance Collections

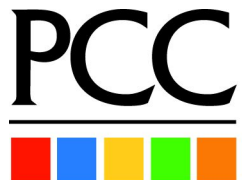
Insurance Follow Up Tools: Unpaid Claims

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 Insurance Follow Up Tools: Denial Management

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



Insurance Collections

Insurance Follow Up Tools: Appeals

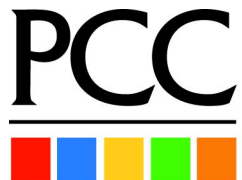
- Know you payer contacts
 - Claims services representative
 - Provider services representative
 - Claims supervisor
 - Appeals coordinator
 - Medical review manager
 - Medical Director



Insurance Collections

Insurance Follow Up Tools: Appeals

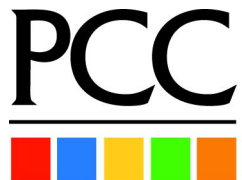
- Sample phone call with carrier
 - Have necessary data in front of you
 - inscoar: interactive mode
 - Know the history of the claim
 - Ask for a time estimate for response



Insurance Collections

Insurance Follow Up Tools: Appeals

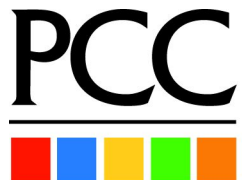
- Sample phone call with carrier
 - Make detailed notes in the Family Editor (fame) or Correct Mistakes (oops)
 - Track start/end time
 - Names, titles, phone number and extension
 - Check numbers and dates
 - Claim id numbers
 - Reference numbers



Insurance Collections

Insurance Follow Up Tools: Appeals

- Use Partner to track claims in appeals
 - Add “Appeals” as an insurance group
 - Add “2. Appeals” as an insurance company
 - Pend claims in appeals to this insurance company using oops
 - Select “Some Other Insurance”, then “2. Appeals”
 - Use inscoar to keep an eye on them



Insurance Collections Review

- Configuration
 - Insurance Configuration
 - Charge Screen Configuration
 - SNAP codes
- Billing Office Prep
- Posting Charges

Insurance Collections Review

- Pre Visit
 - Scheduling
 - Appointment Verification
 - Eligibility Verification



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Insurance Collections Review

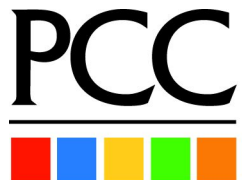
- Insurance Collections
 - Claims submission
 - Posting payments / responses
 - Claims follow up
 - Claim submission tools and reports



Insurance Collections

learn.pcc.com

- Start with our [Billing and Practice Management](#) page.



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Insurance Collections

- Questions?
 - Join myself and Romni at the Collection Roundtable for more discussion.



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