

# Insurance Billing Workflow: From Claim to Paid

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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

# Insurance Billing Workflow

## Pre-Visit

- Eligibility
- Update policies
- Update demographics

# Insurance Billing Workflow

## Pre-Visit: Eligibility

- Verify at least 1-2 days in advance

# Insurance Billing Workflow

## Pre-Visit: Update policies

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

# Insurance Billing Workflow

## Pre-Visit: Update demographics

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

# Insurance Billing Workflow

## Time of Visit

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



# Insurance Billing Workflow

## Time of Visit: Collect copays

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

# Insurance Billing Workflow

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

# 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!

# Insurance Billing Workflow

## 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: Add/verify patient portal

- Accounts can view due balances.
- We are piloting posting payments via the patient portal with the 8.4 release!

# Insurance Billing Workflow

## Post Visit

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

# 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

# Insurance Billing Workflow

## Post Visit: Check for errors

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



# Insurance Billing Workflow

## Post Visit: Send claims

- How often?

# Insurance Billing Workflow

## Post Visit: Send claims

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

# Insurance Billing Workflow

## Post Visit: Fix preptags errors

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

# 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

