Insurance Billing Workflow: From Claim to Paid

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PCC 2019 Users' Conference
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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Pre-Visit

- Eligibility
- Update policies
- Update demographics
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Pre-Visit: Eligibility

- Verify at least 1-2 days in advance
- Be pro-active in updating inactive policies!
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Pre-Visit: Update demographics

- Opportunities to do this
  - When scheduling
  - During eligibility verification
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Pre-Visit: Update policies

- Opportunities to do this
  - When scheduling
  - During eligibility verification
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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
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### Account Balances

<table>
<thead>
<tr>
<th>Aging</th>
<th>0-29 days</th>
<th>30-59 days</th>
<th>60-89 days</th>
<th>90-119 days</th>
<th>120+ days</th>
<th>Credit</th>
<th>Total Balance</th>
</tr>
</thead>
<tbody>
<tr>
<td>Personal</td>
<td>49.64</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>25.00</td>
<td>0.00</td>
<td>74.64</td>
</tr>
<tr>
<td>Insurance</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
</tr>
<tr>
<td>Medicaid</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
</tr>
</tbody>
</table>

### Encounters with Outstanding Personal Balances

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

PCC Pediatric EHR Solutions
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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.
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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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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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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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Post Visit: Check for errors

- Run dailycheck before submitting claims
  - What are you looking for?
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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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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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Post Visit: Crucial reports

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

- Pre-Visit
- Time of Visit
- Post Visit Tasks
CEU Code: