Insurance Billing Workflow

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Q&A and Networking

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Session Goal

1. Learning current insurance billing workflow through PCC EHR and a little PM/Partner

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Overview

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

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Pre-Visit

- Eligibility
- Update policies
- Update demographics

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Poll time!

- Please answer the poll appearing in the Live Session chat room!

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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
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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

Hank & Peggy Hill (Account # 11)

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

Encounters with Outstanding Personal Balances

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

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

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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

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Time of Visit: Update policies

- Make sure the front desk understands insurance plans you accept.
- Get that insurance card EVERY visit
  - Parents can post it on the portal, both sides
- Stress the importance of good data entry
  - Does anyone else think I repeated myself here? I must mean it!

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Poll time!

- Please answer the poll appearing in the Live Session chat room!

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Time of Visit: Add/verify patient portal

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

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Post Visit

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

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- Please answer the poll appearing in the Live Session chat room!

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Post Visit: Post charges

- Who uses Post Charges in the EHR?
  - CPT's easily updated to select modified versions
- 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?
  - Please answer in the Live Session chat!

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Post Visit: Any Outstanding Visits?

- EHR Report Library
  - Billing
  - Encounters by Billing Status
    - Update your date range
    - Billing Status

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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

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Review

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

Session Takeaways

1. Update demographics correctly and early
2. Use the new cool Post Charges in the EHR
3. Run reports to make sure all claims have made it out the door

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References

Post Charges in PCC EHR

- https://learn.pcc.com/help/post-charges-in-pcc-ehr/

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What Questions Do You Have?

Questions posted in the Live Session channel of UC Chat will be read aloud by moderator for presenter to answer. Please post your questions in Live Session.

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