

# Leave Behind the Dark Side: Post Charges, Payments, Submit Claims, and More in PCC EHR!

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CPC-A

# Session Goals

1. Identify tools that are now in the EHR!
2. Show off some upcoming features!

# Why leave the Darkness?

1. Training time for new and established staff is reduced significantly
2. Less jumping from PM to EHR
3. General usability

# Familiar Tools

If you are not using them, you really should start!

Eligibility, Checkin, Appointment Book, Report Library

# Post Charges

PCC EHR

Abigail Addington PCC# 2503

History

Post Charges: 01/14/20

Patient Details

Post Charges

Appointment Details

**Diagnoses**

Procedures

Claim Information

Payments

Receipts

Post Charges Abigail Addington 9 yrs, 11 mos 1/20/10 F

**Diagnoses**

Include Dx on Claim	ICD-10	Description	Linked Procedures
<input checked="" type="checkbox"/>	J02.0	Streptococcal pharyngitis SNOMED: Streptococcal sore throat	99213, 87880 <input type="button" value="All"/> <input type="button" value="None"/> <input type="button" value="Select"/>

select an ICD-10 diagnosis

**Procedures** Primary: Capital Blue Cross

Procedures	Units	Price	Insurance	Ins Due	Ins Adj	Pers Due	Source
<input checked="" type="checkbox"/> 99213 OV Expanded Focus ▶ Dx: 1) J02.0	1	100.00	Primary	90.00	0.00	10.00	Electronic Encounter Form
<input checked="" type="checkbox"/> 87880 Rapid Strep Screen ▶ Dx: 1) J02.0	1	30.00	Primary	30.00	0.00	0.00	Lab (Ordered) <a href="#">DETAILS</a>
<b>Totals:</b>		130.00		120.00	0.00	10.00	

select a procedure

Claim Information Service Provider: Williams PCP: Williams

Use the Diagnoses and Procedures components to review and update diagnoses, procedures, linking, units, and other charge details

# Billing History

**Billing History** Hannah Taglang 11 yrs, 6 mos 12/09/08 F

**07/07/20 Mark Williams, M.D., Burlington Peds - New North End**

**Billing Status:**  
Ready To Post

**Signed:**  
Williams 07/07/20 10:04am  
Cosign needed: Casey

**Appointment Details:**  
Provider: Mark Williams, M.D.  
Place of Service: Burlington Peds - New North End  
Visit Date: 07/07/20

**Account:**  
Albert Taglang (Account #1872)  
5705 Roush Road  
Westminster Station, VT 05159

**Primary Insurance Policy:**  
BCBS 612 Empire

**Billing History Index** Search Filter:  Search ◀ ▶

Date	Provider	Place of Service	Billing Status	Signed	Billing Account	Docs
07/07/20	Mark Williams, M.D.	Burlington Peds - New North End	Ready To Post	Williams, Casey	Albert Taglang (# 1872)	
04/16/16	Alfred Woodward, M.D.	Winooski Pediatrics	Posted	n/a	Albert Taglang (# 1872)	
10/10/15	Fred Jones, M.D.	Winooski Pediatrics	Posted	n/a	Albert Taglang (# 1872)	
10/06/14	Fred Jones, M.D.	Winooski Pediatrics	Posted	n/a	Albert Taglang (# 1872)	

[Create Encounter](#) [Post Charges](#) [View Documents](#) [Close](#) [Save](#) [Save + Exit](#)

# Create Billing Encounters

The screenshot shows a software interface titled "Billing History Index". At the top right, there is a "Search Filter:" text box, a "Search" button, and left and right navigation arrows. Below this is a table header with columns: "Date", "Provider", "Place of Service", "Billing Status", "Signed", "Billing Account", and "Docs". The table body is currently empty. At the bottom of the interface is a toolbar with several buttons: "Print", "Create Encounter", "Post Charges", "View Documents", "Close", "Save", and "Save + Exit". The "Create Encounter" button is highlighted with a red rectangular border, and a mouse cursor is pointing at it.

# Bill Phone Notes and Portal Messages

PCC EHR

Schedule (14) Visit Tasks (4) E-lab Results (3) Rx Queue (0) Messaging (8) Signing (6)

Tasks: 8

Completed	Date	Due	Patient	Subject	Task	To	Docs	Billing Status	Signed
No Tasks	04/02/20 9:55pm		Rogers, Abeline	Phone Note - Asthma attack	None			Posted	Crusher
No Tasks	04/02/20 9:16pm		Martin, Abigail	Phone Note - Nocturnal enuresis...	None			Posted	Crusher
No Tasks	04/08/20 4:54pm		Addington, Abigail	Phone Note - Eczema recurrence	None			Ready To Post	Williams
No Tasks	04/07/20 9:08am		Jetson, Judy	Phone Note	None			Ready To Post	
	04/07/20 8:16am		Flintstone, Pebbles	Portal Message - Abdominal pain	Portal Message			Ready To Post	
No Tasks	04/06/20 3:53pm		Henderson, Rachel E.	Phone Note - Abdominal pain	None			Ready To Post	
	04/01/20 4:01pm		Baker, Alisa M.	Portal Message - Odd Rawsh	Portal Message			Ready To Post	
No Tasks	04/01/20 3:51pm		Flintstone, Pebbles	Phone Note	None			Ready To Post	

Use filters to customize your Messaging queue to display messages for billing

Task: All Tasks Due: 04/08/20 Display: All Statuses

Assigned User: All Users Billing Status: New Items, Pos... Days:  All  Last 1 days Save My Defaults

Page Up Page Down Page 1 / 1 Post Charges Open



# Find Encounters to be Billed

Report Library

## Encounters by Billing Status

Identify visits, phone notes, and portal messages which are waiting to be billed.

**Encounter Date:** From 05/20/2020 to 06/19/2020  
**Provider:** All  
**Location:** All  
**Billing Status:** Ready to Post, New Items

Columns: 7 Displayed      Group By: None      Search:

Encounter Date/Time	Patient Name	Encounter Type	Encounter Reason	Provider	Location	Billing Status
05/31/2020 9:30am	Trott, Lauren	Visit	Problem	Mark Williams, M.D.	New NE	Ready to Post
05/31/2020 2:00pm	Cederstrom, Kristian	Visit	8yr - 9yr Well Visit	Mark Williams, M.D.	New NE	Ready to Post
05/31/2020 2:30pm	Cederstrom, Chris	Visit	10yr - 11yr Well Visit	Mark Williams, M.D.	New NE	Ready to Post
06/19/2020 9:00am	Karper, Allison L.	Visit	Sick Call	Mark Williams, M.D.	New NE	New Items
06/19/2020 9:00am	Karper, Allison L.	Visit	Sick Call	Mark Williams, M.D.	New NE	Ready to Post

5 results

Report Library      Back      Export      Close      Print

Print or export the results, then use the list to find and bill outstanding charges

# Personal Payments

**Payments** Fred Flintstone Account #1980 1400 Rock Road

Posting History

**Account Balances**  
Fred Flintstone (Account # 1980)

Aging	0-29 days	30-59 days	60-89 days	90-119 days	120+ days	Credit	Total Balance
Personal	15.00	0.00	0.00	0.00	0.00	0.00	15.00
Insurance	99.00	0.00	0.00	0.00	155.00	0.00	254.00
Medicaid	0.00	0.00	0.00	0.00	0.00	0.00	0.00

► Encounters with Outstanding Personal Balances

**Payment History** Search Filter:

Transaction Date	Amount	Payment Type	Check Number	Unapplied Amount
► 02/19/22	60.00	Master Card Payment		0.00
► 03/24/21	10.00	Visa Card Payment		0.00
► 02/17/21	68.00	Ins Pmt		0.00
► 02/17/21	0.00	Ins Pmt		0.00
► 02/17/21	0.00	Ins Pmt		0.00
► 02/05/21	20.00	Visa Card Payment		0.00
► 01/12/21	23.45	Ins Pmt		0.00
► 01/12/21	6.55	Ins Adj		0.00
► 01/12/21	11.29	Ins Pmt		0.00
► 01/12/21	3.71	Ins Adj		0.00
► 01/01/21	92.36	Ins Pmt		0.00

Print Receipt Close

# Account Notes


Work Phone:	802-555-0146	Last Bill Sent:	09/13/18
Cell Phone:	802-555-0112	Last Pers. Pmt:	07/14/21
Emg Phone:		Last Ins. Pmt:	07/14/21
Email:	stones@HannaBarbera.com	Hold Bill Until:	
		Budget Amt:	\$

**Account Notes**

Fred Flintstone (Account # 1980)

**New Note**

▼ 2011 (1 Thread)

▶ 02/17/11 1275 (1 comment) + 

I set up an account for Pebbles today and placed mom and dad's insurance on the acct. Jody will contact both plans to find out which one is primary for the first 31 days.

Cancel Save Save + Exit

# Claim Holds

## Claim Holds

Claim holds prevent claims from being submitted to the payor. When a claim matches criteria in a claim hold, the claim will not be submitted. Once a claim hold is deleted, those claims can be submitted.

### Claim Hold Details

Description:	Temp hold on Geisinger HMO (2022 Spring, see Nancy for details)
Dates of Service:	04/01/22 - 05/31/22
Billing Providers:	All Providers
Places of Service:	All Places of Service
Insurance Plans:	▸ 5 Insurance Plans
Modified:	Nancy Billini 05/24/22 10:20am

### Claim Hold Index

Description	Dates of Service	Billing Providers	Places of Service	Insurance Plans	Modified
Dr. Crusher credentialing (Rem...	01/01/22 - 06/30/22	1 Provider	All Places of Service	131 Insurance Plans	Nancy Billini 05/24/22 10:19am
Temp hold on Geisinger HMO (...)	04/01/22 - 05/31/22	All Providers	All Places of Service	5 Insurance Plans	Nancy Billini 05/24/22 10:20am

Click on a claim hold to see details above

Add Delete Edit Close

# Submit Claims

Submission Log

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## Claims - Submission

**Will not be submitted:**

Delayed:	3 Claims
Held:	8 Claims
Need Corrections:	4 Claims

**Electronic claim batches prepared to submit:**

<span>Edit</span>	All Claims ( 1168 claims )
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**Claims to be routed to paper:** 0 Claims

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Close Submit Claims

# Coming Soon!

## Insurance Payments

Work on claims that can not be submitted

# References

Find step by step instructions on  
[Learn.pcc.com](https://learn.pcc.com)

# What Questions Do You Have?



# Later Viewing

This and all other UC2023 course recordings will be available for later viewing through the app.