

PCC Billing, Now in Technicolor!

Benjamin Brandt
Get Paid SME & Consultant

UC
2024

Session Goals

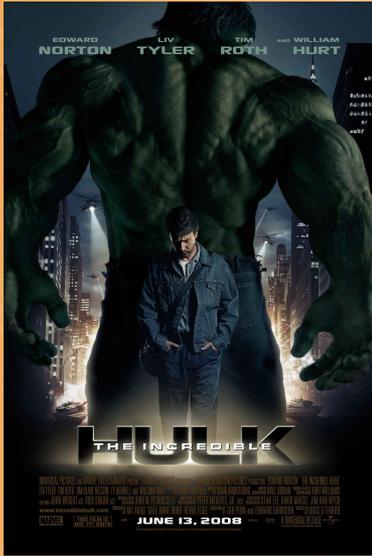
1. Learn about the history of moving billing into PCC EHR
2. Learn about all the enhancements added when billing moves into PCC EHR
3. Alleviate fears of change and encourage EHR use for billing staff

The Start of Billing in PCC EHR

April 2009

PCC EHR was released and with it the ability to scan documents and store insurance cards

The Start of Billing in PCC EHR



June 2008

April 2009
PCC EHR was
released and with it
the ability to scan
documents and store
insurance cards



May 2008

What Came Next?

In July of 2014, after five years of PCC EHR clinical development PCC circled back around to billing needs. The PCC EHR diagnosis tool could now do reverse lookup based on ICD-9 codes

A mere two months later ICD-9 codes along with procedure table codes could be added by providers via the Electronic Encounter Form

The American Recovery and Reinvestment Act

A year later PCC finished development of tools and reports to meet requirements for ARRA.

During this time development on feature rich releases slowed to meet government requirements for certified EHR products.

The Next Slate of Features

Much like the cinematic universe that had gripped moviegoers in the mid-2010s PCC was also moving on to its next phase of features in the EHR.

It was time for Phase 2.

Covid Disrupts the Industry



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Battling Covid with PCC EHR Features

In April and June of 2020 PCC put out features specific to helping offices get through the Covid pandemic. Notable billing features included:

- Billing for a telemedicine visit
- Checking insurance eligibility while entering a phone note or portal message

Post Covid Enhancements

Starting in August of 2020, PCC resumed its normal release schedule of feature-rich releases.

In UC theme and “Marvel” fashion I’ve broken these down into “Phases 3 & 4” to indicate billing features post covid until last year's UC and every release in the past year.

Feature Rich: Billing in PCC EHR

Demographics and Documents

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Feature Rich: Billing in PCC EHR

Demographics and Documents

Import Documents

File Selection

File Source: All File Sources

Sort By: Date Filename

Date

- 12/12/20 9:12am
36_page_doc_DeveloperToo...
36 Pages
- 12/12/20 9:11am
28_page_document.pdf
28 Pages
- 12/09/20 10:21am
0001S220090708_082307000...
1 Page
- 12/09/20 10:21am
0001S220090708_082307000...
1 Page
- 12/09/20 10:21am
0001S120090709_132502007...
1 Page
- 12/09/20 10:21am
0001S120090709_132502007...
1 Page
- 12/09/20 10:21am
0001S120090709_132502007...
1 Page

Split File Remove Load New Files

Preview

PATIENT DISCHARGE PLAN

ACTIVITY RESTRICTIONS:

ADVERSE REACTIONS:

TITLE OF INSTRUCTION SHEETS GIVEN: HEART DISEASE PNEUMONIA SMOKING CESSATION

OTHER: MEDICATION ALLERGY PRESCRIPTION

INSTRUCTIONS OF TREATMENT:

QUIT SMOKING: If you smoke, QUIT SMOKING! If you are a current smoker, please discuss smoking with the last user of the unit. If you are a former smoker, call the CONNECTICUT OUTLINE AT 1-800-END HARMET (1-800-362-4324) for help and support for the Nicotine VAPOR CESSATION, for information on the Nicotine VAPOR CESSATION PROGRAM FROM SMOKING PROGRAM.

DISCHARGE MEDICATION:

YOU ARE SCHEDULED FOR:

CONTACT PEOPLE:

REPERALS MADE TO COMMUNITY RESOURCES:

NURSING DISCHARGE ASSESSMENT NOTE:

VACCINES GIVEN THIS ADMISSION:

HOME HOP OTHER ACCOMPANIED BY:

RECHARGE/DIET/STAY:

0001S120090709_132502007... 12/09/20 10:21am

Print Rotate Document Full Screen

Find Patient

Find

- Taylor Travitz (13y 4m, M)
- Sara Sampson (16y 2m, F)
- Nathan Nailor (15y 9m, M)
- Bailey Balog (5y 5m, M)
- David Deem (15y 9m, M)
- Charissa Calfo (6m 1w, F)
- Megan Marciano (8y 10m, F)
- Adam (Amanda) ...er (16y 8m, F)
- Allison L. Karper (4y 1m, F)
- Vance "Vitals" B Poole P.C (7y, M)

Select a recent patient, or pop open the last patient

Last Patient Select

Feature Rich: Billing in PCC EHR

Demographics and Documents

Import Documents

File Selection

File Source: All File Sources

Sort By: Date Filename

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- 12/12/20 9:12am
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- 12/09/20 10:21am
0001S120090709_132502007...
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- 12/09/20 10:21am
0001S120090709_132502007...
1 Page
- 12/09/20 10:21am
0001S120090709_132502007...
1 Page

Split File Remove Load New Files

Preview

PATIENT DISCHARGE

ACTIVITY RESTRICTIONS:

ADVERSE REACTIONS:

TITLE OF INSTRUCTION SHEETS GIVEN:

ORDER:

INSTRUCTIONS ON TREATMENTS:

QUIT SMOKING: If you smoke, QUIT SMOKING! If you are a current smoker who smokes, call the CONNECTICUT OUTLINE for QUIT SMOKING, FREE SERVICES, for information on the QUIT SMOKING:

DISCHARGE MEDICATION:

YOU ARE SCHEDULED FOR:

CONTACT PEOPLE:

HOME: DAY: OTHER:

RECEIVED ON: RECEIVED BY: EXTENDED:

0001S120090709_132502007...

Print Rotate Document

Demographics Pebbles Flintstone 10 yrs, 2 mos 6/02/07 F

Pebbles Flintstone
Date of Birth: 06/02/07
Sex: Female

Patient Information
Patient Flags: \$\$ Problem, Adoption, Rcpoia, Downstairs
PCP: Mark Williams, M.D.
Other ID: 828-74-6104
School: Bedrock Central
Note: Rubble
Old PM ID #: 2755
Relation to Bill Payor: Child

Birth History
GA at Birth: Undetermined
Multiple Birth: Undetermined

Race, Ethnicity, and Preferred Language
Race: White
Ethnicity: Not Hispanic or Latino
Pref. Language:

Communication Preferences
Patient's Confidential Communication Preference
Wilma Flintstone Cell Phone: 802-555-1212

Immunization Registry Communication Preferences
Share with Registry: Undetermined
Preferred Contact Method for the Immunization Registry: Undetermined

Account Demographics
Home and Billing Account
Fred Flintstone (Account # 1980)

Account Information
Account Flags: Billing Problem
EMG Contact: Wilma
EMG Phone #: 802-991-9911
Alt Last Name:
Mother Employer: 134-334-8932
Father Employer: 567-127-4815
Pharmacy #:

Recent Financial History
Last Service: 08/29/17
Last Bill Sent: 09/18/17
Last Pers. Pmt: 07/25/16
Last Ins. Pmt: 06/20/16
Hold Bill Until:
Budget Amt:

Personal Contacts
Personal Contacts have not been entered.

Policies
Primary Insurance
Ins. Policy: Aetna HDHP (Copay \$15)
Certificate: 34DFJH
Relationship: Child

Secondary Insurance
None

Siblings
Open Chart Dino Flintstone 4 yrs, 3 mos 04/11/13 M

Edit Add Phone Note Close Save Save + Exit

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Feature Rich: Billing in PCC EHR

Demographics and Documents

The screenshot displays the PCC EHR Billing Account Portal User interface. A callout box points to the 'Reassign Account' button in the 'Account Demographics' section. Another callout points to the 'Billing Account Portal User' dialog box, which contains a list of existing users and a 'Create Account' button. A third callout points to the 'Create Account' button in the 'Account Finder' dialog box, which is used to search for existing accounts.

Account Demographics

Home Account: **Reassign Account**

Home Account Information

Account Flags: CONFIDENTIAL

EMG Contact: Fred

EMG Phone #: 802 991-6812

Alt Last Name: Rubble

Mother Employer: 439-213-8174

Father Employer:

Pharmacy #:

Address

15 Quarry Lane

address 2

Winooski VT 05404

Phone

Home Phone: 802-555-0194

Work Phone: 802-555-0197

Cell Phone: 802-555-0161

Recent Financial History

Last Service: 12/12/2021

Last Bill Sent: 12/12/2021

Last Pers. Pmt: 12/12/2021

Last Ins. Pmt: 12/12/2021

Demographics

Pebbles Flintstone 10 yrs, 2 mos 6/02/07 F

Patient Information

Patient Flags: SS Problem, Adoption, Rcopia, Downstairs

PCP: Mark Williams, M.D.

Other ID: 828-74-4304

School: Bedroc

Note: Rubble

Old PM ID #: 2755

Relation to Bill Payor:

Reassign Account

Pebbles Flintstone 10 years 3/16/07 F

Account Finder

Select an account to be assigned to the patient. Current Home Account: Wilma Flintstone (Account # 1981)

Select an account to be assigned to the patient. Current Billing Account: Fred Flintstone (Account # 1980)

flintstone Find

Search Results for Name: flintstone

Last	First	Last Service	Address	Account #	Account Flags
Flintstone	Wilma		15 Quarry Lane, Winooski, VT	1981	CONFIDENTIALITY
Flintstone	Fred	06/12/17	1400 Rock Road, Winooski, VT	1980	Billing Problem

The "Create Account" button appears after you perform a search

Billing Account Portal User

The Billing Account is "Don Smith"

Select the Billing Account's portal user:

- Don Smith 802-555-7878
- Geoffery Smith 802-355-8080
- Portia Smith 802-555-7979

Add a new portal user

Cancel Continue

Account Finder

Personal Contacts have not been entered.

Policies

Primary Insurance

Ins. Policy: Aetna HDHP (Copay \$15)

Certificate: 34DFJH

Relationship: Child

Secondary Insurance

None

Siblings

Open Chart: Dino Flintstone 4 yrs, 3 mos 04/11/13 M

Edit Add Phone Note Close Save Save + Exit

Feature Rich: Billing in PCC EHR

Demographics and Documents

Account Demographics

Home Account
 Wilma Flintstone (Account # 1981)
 First Name: Wilma
 Last Name: Flintstone

Address
 15 Quarry Lane
 address 2
 Winooski

Phone
 Home Phone: 802-5
 Work Phone: 802-5
 Cell Phone: 802-5

Home Account Information
 Account Flags: CONFIDE
 EMG Contact: Fred
 EMG Phone #:

Reassign Account

Add Policy

Insurance:

Copay:

Certificate:

Group:

Start Date:

End Date:

Subscriber:
 First Name: Fred
 Last Name: Flintstone
 Date of Birth:
 Sex: Unknown
 Address: 1400 Rock Road
 address 2
 Winooski VT 05404
 Employer:
 Pt. Relationship to Subscriber: Child

Demographics

Enter part of the plan name, and optionally a copay, to quickly search your Insurance Plan table

Policies Display: All Statuses

Insurance	Copay	Certificate	Group	Start	End	Status
1. Aetna HDHP	\$15.00	34DFJH	44433322211	11/01/14		Active
Subscriber: Wilma Flintstone Date of Birth: 04/04/90 Sex: Female Address: Employer: Pt. Relationship to Subscriber: Daughter Ins. Address: PO Box 981106 El Paso, TX 79998-1106 Ins. Phone: 800-722-1082 Payer ID: 60054 Ins. Notes: Sample notes about this insurance policy.						
2. Medicaid	\$0.00	111223333		01/01/18		Active
Aetna USHC HMO \$20	\$20.00	BG4582164	1234567	11/01/13	10/31/14	Expired
Cigna PPO \$20	\$20.00	GH6DF22FGHRD34	765432	09/28/09	10/31/13	Expired

Edit Policy

Insurance: Highmark PPO Blue \$15 ZAR
 Copay: \$15.00
 Certificate: ZAR199604527
 Group: YOU539
 Start Date: 09/23/21
 End Date:

Subscriber:
 First Name: Robert
 Last Name: Young
 Date of Birth: 04/25/92
 Sex: Female
 Address:
 address 2
 city state zip code
 Son

Attachments

Title: none
 Category: Insurance/Billing
 Last Modified: daniel 09/11/23 3:45pm

Remove Attachment View Document

Remove or view the document

Expire Delete Cancel Save

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Feature Rich: Billing in PCC EHR

Demographics and Documents

Account Demographics

Home Account
Wilma Flintstone (Account # 1981)

First Name: Wilma
Last Name: Flintstone

Address
15 Quarry Lane
address 2
Winooski

Phone
Home Phone: 802-5
Work Phone: 802-5
Cell Phone: 802-5

Insurance: BCBS 2
Copay: BCBS 2
Certificate: BCBS \$
Group: BCBS \$
Start Date: BCBS 2
End Date: BCBS \$

Subscriber:
First Name: Fred
Last Name: Flintstone
Date of Birth: Un
Sex: Un
Address: 140
add
Winooski

Employer:
Pt. Relationship to Sub

Pre-Check-In

Patient Demographics	Current	Pre-Check Information
Name	Kellyn Wilson	Kellyn Wilson
Nickname		
Date of Birth	12/29/19	12/29/19
Sex	Female	Female
Race		<input checked="" type="checkbox"/> White
Ethnicity		<input checked="" type="checkbox"/> Prefers not to answer
Pref. Language		<input checked="" type="checkbox"/> English
Account Demographics	Current	Pre-Check Information
Name	Daniel Wilson	Daniel Wilson
Address	RD 7 Box 006 Saxtons River, VT 05154	RD 7 Box 006 Saxtons River, VT 05154
Home Phone	802-555-0183	802-555-0183
Work Phone	802-555-0109	802-555-0109
Cell Phone	802-555-0194	802-555-0194
	802-555-0104	802-555-0104
Account Demographics	Current	Pre-Check Information
Insurance	BCBS \$30 OV&WC-other	BCBS \$30 OV&WC-other
Status	Active	Active
Card Image		<input checked="" type="checkbox"/> View Image

Import Pre-Check information submitted by Daniel Wilson (Guardian) 09/13/23 10:26am

Display: All Statuses

Group	Start	End	Status
22211	11/01/14		Active
Address:	PO Box 981106 El Paso, TX 79998-1106		
Phone:	800-722-1082 60054		
Notes:	Sample notes about this insurance policy.		
	01/01/18		Active
7	11/01/13	10/31/14	Expired
	09/28/09	10/31/13	Expired

Document ID: 54771

Cancel Continue

Clicking import will accept all information with a checkmark and completes pre-check-in

Submitted card images can be viewed by clicking "View Image"

Checked items will be imported to the patient's record

Information submitted during pre-check-in appears in orange

Feature Rich: Billing in PCC EHR

Patient Check-In

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Feature Rich: Billing in PCC EHR

Patient Check-In

The screenshot displays the PCC EHR Patient Check-In interface. At the top, there is a search bar with the PCC EHR logo and a 'FIND' button. Below this, there are tabs for 'Schedule (21)', 'Visit Tasks (5)', and 'E-lab Results (1)'. The date is set to 'Mon 07/09/18'. The main area is a table of appointments with columns for Visit Status, Room, Tasks, Time, Last, First, and DOB/S. The 'Visit Status' column has a dropdown menu with options: 'w/Provider', 'w/Nurse', 'Checked In', 'Checked In', 'Scheduled', and 'Scheduled'. The 'Scheduled' option is highlighted, and a callout box points to it with the text 'Click "Scheduled" to check in this patient'. The table shows several appointments, with the one at 2:45pm (Acker P.C. Christopher R.) highlighted in blue. Below the table, there are filters for 'Visit Status', 'Location', 'Billing Status', and 'Provider'. At the bottom right, there are buttons for 'Patient Check-In' and 'Open Chart'. A callout box points to the 'Patient Check-In' button with the text 'You can open Patient Check-In for any appointment, even one that is already Checked In or Arrived'.

Visit Status	Room	Tasks	Time	Last	First	DOB/S
Gone		UNDO	9:00am	Blanchard	Rudy	12/19/
Gone		UNDO	9:00am	Davis Sr.	Christopher "Eric" Victoria	01/05/
Gone		UNDO	9:30am	Sewell JR.	Andrew "Elizabeth" Ruth	02/08/
w/Provider	4	END VISIT	10:45am	Hoffman	Meghan	10/29/0
w/Nurse	2	END VISIT	11:00am	Gage	Jason	11/25/
Checked In		END	11:30am	Maines	Gabrielle	07/11/16 F
Checked In		END VISIT	1:30am	Maines	Gabrielle	07/11/16 F
Checked In		END VISIT	1:45pm	Gallo	Thomas H.W.	04/28/14 M
Scheduled		END VISIT	2:00pm	Rappaport	Nicholas	06/22/05 M
Scheduled		END VISIT	2:45pm	Acker P.C	Christopher R.	07/08/14 M
Scheduled		END VISIT	3:15pm	Strunk P.C	Cameron "Katie" Margaret	08/20/12 M
Scheduled		END VISIT	3:45pm	Carbaugh	Matthew	01/29/08 M

Click "Scheduled" to check in this patient

Visit Status: All Visit Statuses Location: All Locations
Billing Status: All Billing Statuses Provider: All Providers

Save My Defaults

Patient Check-In Open Chart

You can open Patient Check-In for any appointment, even one that is already Checked In or Arrived

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Feature Rich: Billing in PCC EHR

Patient Check-In

The screenshot displays the PCC EHR Patient Check-In interface for a patient named Dino Flintstone, 4 years old. The interface includes a navigation bar with 'PCC EHR' and tabs for 'Schedule (21)', 'Visit Tasks (5)', and 'E-lab Results (1)'. A sidebar on the left lists various patient information sections, with 'Appointment Details' selected. The main content area shows appointment details for a scheduled visit on 7/13/18 at 10:00am. A 'Clinical Alert' window is prominently displayed in the center, featuring a red border and a warning icon. The alert text states: 'Clinical Alert: Cash Only. This patient's family is marked "Cash Only" for the payment of today's copay or any outstanding balance. For more information, please talk to Cindy or Dan in billing.' A 'Continue' button is located at the bottom of the alert window. To the right, a 'Add Clinical Alert' dialog box is visible, showing the alert name 'Cash Only' and a message explaining the 'Cash Only' status. Below the dialog, there are checkboxes for 'Present this Alert when:' with options 'The Chart is Opened', 'The Chart is Saved', 'Scheduling Appointments', and 'Patient Check-In'. A yellow callout box asks 'When should the alert appear?'. A yellow callout box at the bottom left points to the 'Appointment Details' section in the sidebar, stating 'Click "Schedule check in this...'. The bottom left corner features the text 'UC 2024' and the bottom right corner features the PCC Pediatric EHR Solutions logo.

PCC EHR Schedule (21) Visit Tasks (5) E-lab Results (1)

PCC EHR Dino Flintstone PCC# 3335

Patient Check-In

- Appointment Details
- Patient Demographics
- Forms
- Siblings
- Privacy Notice
- Communication Preferences
- Patient Portal Users
- Account Demographics
- Policies
- Insurance Eligibility
- Account Balances
- Time of Service Payments

Appointment Details

Visit Status: Scheduled

Appt Time: 7/13/18 10:00am

Arrival Time: Not Yet

Visit Reason: Sick

Patient Age: 4 yrs

Location: Window

Provider: Elizabeth

Appt Note:

Patient Demographics

Dino Flintstone

First Name: Dino

Nickname:

Middle Name:

Last Name: Flintstone

Suffix:

Date of Birth:

Sex: Male

Deceased: No Yes

Relation to Bill Payer: Child

Clinical Alert: Cash Only

Clinical Alert: This patient's family is marked "Cash Only" for the payment of today's copay or any outstanding balance. For more information, please talk to Cindy or Dan in billing.

Continue

Add Clinical Alert

Alert Name: Cash Only

Alert Message: This patient's family is marked "Cash Only" for payment of their copay or when settling their account. Please inform family when scheduling that their copay must be paid in cash. For more information, please refer the family to the billing office.

Present this Alert when:

- The Chart is Opened
- The Chart is Saved
- Scheduling Appointments
- Patient Check-In

When should the alert appear?

Click "Schedule check in this..."

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Feature Rich: Billing in PCC EHR

Patient Check-In

The screenshot displays the PCC EHR Patient Check-In interface. The main window shows patient information for Pebbles Flintstone (10 years, 6/14/08, F) and insurance eligibility details for Aetna HDHP. A red box highlights the 'Patient Check-In' tab, and another red box highlights the 'Status: Validated' dropdown menu. A yellow callout box points to the 'Request Eligibility' button, stating: 'Joan reviewed eligibility for this appointment already, but you can request a new report'. Another yellow callout box points to the disclosure arrows, stating: 'Click the disclosure arrows to expand either report'. A third yellow callout box points to the 'Schedule' button, stating: 'Click "Schedule check in this'.

PCC EHR Schedule (21) Visit Tasks (5) E-lab Results (1)

PCC EHR Patient Check-In

PCC EHR FIND

PCC EHR Patient Check-In

PCC EHR Pebbles Flintstone PCC# 3336

Appointment Details
Patient Demographics
Communication Preferences
Patient Portal Users
Account Demographics
Policies
Insurance Eligibility

Insurance Eligibility

Appt: Well Visit 07/13/18 9:00am Beverly Crusher, MD
PCP: Mark Williams, M.D.

Eligibility Notes:

Aetna HDHP
Copay: \$15.00 Cert: 34DFJH Group: Subscriber:
Status: Validated 07/12/18 [Joan]

Eligibility Response: 07/12/18 Active

▶ Summary Report
▶ Full Report

Account Balances

Aetna HDHP
Copay: \$15.00 Cert: 34DFJH Group: Subscriber:
Status: mm/dd/yy
Eligibility: Demo Needed 18 Active

▶ Sum See Billing
▶ Full See Notes
Validated

Request Eligibility

Request Eligibility

Click "Schedule check in this

Click the disclosure arrows to expand either report

Joan reviewed eligibility for this appointment already, but you can request a new report

Click "Sched
check in this

Click the disclosure
arrows to expand
either report

Joan reviewed eligibility for
this appointment already,
but you can request a new report

Request Eligibility

Request Eligibility

Sex: Ma
Deceased: No Yes enter date

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Feature Rich: Billing in PCC EHR

Patient Check-In

The screenshot displays the 'Patient Portal Manager' interface. At the top, there are tabs for 'Administration' and 'Configuration'. Below these, there are buttons for 'Add Portal User', 'Manage Portal User', and 'Delete Portal User'. The main area shows a list of portal users with their details:

Name	Email	Phone	Last Login	Temporary Password	Unread Messages	Unviewed Documents
Wilma Flintstone	wilma@bedrock.com	800-722-1082	07/11/18 11:30am		0	0
Fred Flintstone	fred@bedrock.com	800-722-1082	never	WSyehRcv	0	0

Callouts provide additional context:

- Open the Patient Portal Manager to reset a password, adjust patient access, and more**: Points to the 'Manage Portal User' button.
- Review portal users who can view this patient, along with their recent activity**: Points to the user details for Wilma Flintstone.
- Select billing account for personal balance display**: A red box highlights a section with the following text: "The balance will not include charges for patients in *italics*. These patients have privacy enabled or are not connected to the portal user." Below this are two radio buttons: Fred Flintstone (Patients: *Dino Flintstone*, Pebbles Flintstone) and Do not display balance.

Other visible interface elements include 'Add Clinical Alert', 'Time of Service Payments', 'Status: Validated', and 'Deceased: No Yes enter date'.

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Feature Rich: Billing in PCC EHR

Patient Check-In

Account Balances Jeffrey Addington (Account # 1238) Print

Aging	0-29 days	30-59 days	60-89 days	90-119 days	120+ days	Credit	Total Balance
Personal	0.00	0.00	0.00	0.00	207.00	0.00	207.00
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

Abigail Addington (PCC# 2503) Mark Williams, M.D. Winooski Pediatrics

Date	Description	Charge	Payment/Adj	Insurance Due	Medicaid Due	Personal Due
10/09/23	Missed Appointment Fee	15.00		0.00		15.00
10/09/23	Missed Well Visit	0.00		0.00		0.00
		15.00	0.00	0.00	0.00	15.00

Nathaniel Addington (PCC# 3087) Mark Williams, M.D. Winooski Pediatrics

Date	Description	Charge	Payment/Adj	Insurance Due	Medicaid Due	Personal Due
09/20/23	OV Expanded Focus	56.00		0.00		46.00
09/20/23	TOS Check Payment		10.00			
		56.00	10.00	0.00	0.00	46.00

Open the Patient Portal Manager to reset a password, adjust patient access, and more

Manage Portal User

Review portal users who can view this patient, along with their recent activity

Time of Service Payments Lori Rappaport (Account # 1569)

Patient	Visit Reason	Insurance	Due	Description
Nicholas Rappaport	12yr - 13yr Well Visit	Direct Blue \$20-ZAB	20.00	Expected Copay
			0.00	Personal Balance
			0.00	Unsaved Payments
			20.00	Expected Balance

Payment Type: Provider: Mark Williams, M.D.

Save Payment Print Receipt

A \$20 copay is expected for Nicholas's Well Visit today. The family has no outstanding personal amount due

Winooski Pediatrics

Personal Due **97.00**

Hide at age 18 DOB 07/11/08 Age 10y 1m PCC # Custodian 3336 Wilma Flintstone

[Reset Password](#)

Add Siblings Add Patients

ing account for personal balance display

not include charges for patients in *Italics*. These patients have privacy enabled or are not connected to

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Feature Rich: Billing in PCC EHR

Patient Check-In

Open the Patient Portal to reset a password or patient access, etc.

Manage Portal User

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PCC Pediatric Test Associates
20 Winooski Falls Way, Suite 7
Winooski, VT 05404-2228
(800) 722-7708

Dino Flintstone
DOB: 05/01/14
Sex: Male

Pebbles Flintstone
DOB: 06/21/08
Sex: Female

Billing Account

Fred Flintstone
1400 Rock Road
Winooski, VT 05404

Insurance

Aetna HDHP
Subscriber:
Certificate: 34DFJH
Group:

Payments

Date	Payment	Amount
07/13/18	Visa Card Payment	218.00

Add Clinical Alert

11/18 11:30am

or when settling
must be paid in
e.

Payment type: 0.00 Elizabeth Mary Casey, MD

Save Payment **Print Receipt**

Previous Next Cancel Save Save + Check In

DOB Age PCC # Custodian
07/11/08 10y 1m 3336 Wilma Flintstone

Personal balance display

patients in *italics*. These patients have privacy enabled or are not connected to

bles Flintstone

Feature Rich: Billing in PCC EHR

Patient Check-In

The screenshot displays the PCC EHR software interface. The 'Edit' menu is open, with 'Revert Status to Scheduled' highlighted. Below the menu, a patient list table is visible, with the first row highlighted. The table columns include Visit Status, Room, Tasks, Time, Last, First, DOB/Sex, Age, Visit Reason, Provider, and Billing.

Visit Status	Room	Tasks	Time	Last	First	DOB/Sex	Age	Visit Reason	Provider	Billing
Scheduled			3:00pm	Gorman Phd.	Kelly "Tony" Tyler	10/08/18 F	9m	9mo Well Visit	Gomez	
Scheduled			3:00pm	Tozzini V.	Daniel Lee	09/26/03 M	15y 9m	Asthma Recheck	Williams	
Scheduled			3:45pm	Drescher	Reid	11/28/17 M	1y 7m	18mo Well Visit	Gomez	
Scheduled			4:00pm	College	Kiley	08/04/06 F	12y 11m	Medication Followup	Williams	

UC
2024

Feature Rich: Billing in PCC EHR

Real Time Eligibility

**UC
2024**

Feature Rich: Billing in PCC EHR

Real Time Eligibility

Insurance Eligibility Appointments: 300

◀ Mon 10/01/18 ▶

Time	Patient	Insurance Group	Response Date	Coverage Status	Verification Status	Verification Date
8:00am	Balog, Bailey	UHC Community Plan	09/30/18	Active	Validated	09/28/18
8:15am	Calfo, Charissa	Aetna	09/30/18	Active		
8:30am	Ruhl, Ryan A.	Other	n/a	n/a		
8:45am	Jetson, Judy	Amerigroup	09/30/18	Active		
9:15am	Deem, David	Bcbs	09/30/18	Active		
9:30am	Bevan, Ryan	Self Pay	n/a	n/a		
9:45am	Matteucci, Chelsea	Bcbs	09/30/18	Active		
10:00am	Chmiel, Erica	Aetna	09/30/18	Active		
10:15am	Dile, Heather	Horizon M/C	n/a	n/a	Validated	09/27/18
10:30am	Everitt, Paul	Self Pay	n/a	n/a		
10:30am	Flanagan, Aimee	United Healthcare	09/30/18	Active	See Billing	
11:00am	Cederstrom, Braden C.	Oxford	09/30/18	Inactive		
12:15pm	Warner SR., Matthew "Liam" Morgan	UHC Community Plan	09/30/18	Active	Validated	09/28/18
2:30pm	Seidel, Emerson Alexander	UHC Community Plan	09/30/18	Active		
3:00pm	Flintstone, Pebbles	United Healthcare	09/30/18	Active	See Billing	
3:15pm	Goulet SR., Carmen "Wesley" Eugene	Bcbs	09/30/18	Inactive		
4:00pm	Mateer, Tiffany	Aetna	09/30/18	Active		

Location:
 Coverage Status:

Insurance Group:
 Verification Status:

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Feature Rich: Billing in PCC EHR

Real Time Eligibility

Insurance Eligibility

Time	Patient
8:00am	Balog, Bailey
8:15am	Calfo, Charissa
8:30am	Ruhl, Ryan A.
8:45am	Jetson, Judy
9:15am	Deem, David
9:30am	Bevan, Ryan
9:45am	Matteucci, Chelsea
10:00am	Chmiel, Erica
10:15am	Dile, Heather
10:30am	Everitt, Paul
10:30am	Flanagan, Aimee
11:00am	Cederstrom, Braden C.
12:15pm	Warner SR., Matthew "Liam" Morgan
2:30pm	Seidel, Emerson Alexander
3:00pm	Flintstone, Pebbles
3:15pm	Goulet SR., Carmen "Wesley" Eugene
4:00pm	Mateer, Tiffany

Location: All Locations
Insurance Group: All Insurance Groups

Insurance Eligibility - Review and Verify

Pebbles Flintstone 10 yrs, 1 mo 9/10/08 F

Insurance Eligibility

Appt: Sick Call 10/15/18 3:00pm Mark Williams, M.D.
PCP: Mark Williams, M.D.

Eligibility Notes:

Aetna HDHP

Copay: \$15.00 Cert: 34DFJH Group: Subscriber:
Status: Validated 09/30/18 [PCC PCC]

Eligibility Response: 09/30/18 Active Request Eligibility

▼ Summary Report

Plan: 11/01/2015-10/31/2018
PROFESSIONAL (PHYSICIAN) VISIT - OFFICE
In Network Benefits:
\$5 Individual Copayment Visit
Benefit: 10/01/2018-10/31/2018
MSG: SPECIALIST
HEALTH BENEFIT PLAN COVERAGE - NJ FAMILY CARE D-WCOPAY-DENTAL
Active Coverage

► Full Report

Policies

Edit Policy Add Policy Display: Active

Insurance	Copay	Certificate	Group	Start	End	Status
1. Aetna HDHP	\$15.00	34DFJH		02/02/16		Active

Patient Demographics

Previous Next Cancel Save Save + Next

Use these buttons to move between components in the ribbon

Use this button to move to the next patient's record

UC
2024

Feature Rich: Billing in PCC EHR

Real Time Eligibility

Appointment Book
 Schedule Appointment | Add Block
 Provider: Today | Sun-Sat | Mon-Fri | Day All | Day Working
 Location: Week of Sunday, 04/21/24

Patient Details
 Abigail Addington 10y 3m 01/01/14 F

Insurance Eligibility
 Date: 04/24/24
 PCP:
 Horizon
 Copy: \$20.00 Cert: 0000 Group: 0000 Subscriber: Jason
 Eligibility Response: Eligibility Undetermined
 Request Eligibility

Patient Demographics
 Abigail Addington
 Date of Birth: 01/01/14
 Sex: Female
 Visit: 07/16/18
 11-17 Yr Well Visit v2.0
 Appointment Details
 Vitals
 Growth Charts
 Past Medical/Family/Social ...
 Smoking Status
 Development
 Physical Exam
 Immunizations
 Consent
 Orders
 Screening
 Anticipatory Guidance
 Diagnoses
 Plan

Insurance Eligibility
 App: Well Visit 07/13/18 9:00am Beverly Crusher, MD
 PCP: Mark Williams, M.D.
 Eligibility Notes:
 Aetna HDHP
 Copy: \$15.00 Cert: 34DFJH Group: Subscriber:
 Status:
 Eligibility Response: 07/16/18 Active
 Request Eligibility

Insurance Eligibility
 App: Well Visit 07/13/18 9:00am Beverly Crusher, MD
 PCP: Mark Williams, M.D.
 Eligibility Notes:
 Aetna HDHP
 Copy: \$15.00 Cert: 34DFJH Group: Subscriber:
 Status:
 Eligibility Response: 07/12/18 Active
 Request Eligibility

Insurance Eligibility
 App: Well Visit 07/13/18 9:00am Beverly Crusher, MD
 PCP: Mark Williams, M.D.
 Eligibility Notes:
 Aetna HDHP
 Copy: \$15.00 Cert: 34DFJH Group: Subscriber:
 Status:
 Eligibility Response: 07/12/18 Active
 Request Eligibility

Insurance Eligibility
 Encounter: 05/13/20 James Davidson, Jr. M.D.
 PCP: Elizabeth Mary Casey, MD
 Aetna USHC \$ 0 (PO BOX 981106)
 Copy: \$0.00 Cert: 123456789 Group: MOUSE99887766 Subscriber: Mickey Mouse
 Eligibility Response: 05/13/20 Active
 Request Eligibility

Callouts:

- Request eligibility from the Patient Details window while scheduling
- Click to work with eligibility fields during the visit
- PCC EHR will open the Summary Report for you if no status or date has been entered yet
- The insurance company has verified that this is an active policy
- Use these buttons to move between components in the ribbon
- Use this button to move to the next patient's record

UC 2024

PCC
 Pediatric EHR Solutions

Feature Rich: Billing in PCC EHR

Real Time Eligibility

Insurance Eligibility - Review and Verify

Erin Marie Zeller F

Insurance Eligibility
 Appt: 18mo Well Visit 07/15/21 9:00am Mark Williams, M.D.
 PCP: None

Eligibility Notes: Sample note sample note sample note

Highmark Classic Blue
 Copay: \$0.00 Cert: ZAH1021815767001 Group: 416 Subscriber: Dawn Zeller

Status:

Eligibility Response: This eligibility request cannot be submitted.
Alert: The patient's date of birth is missing.
Explanation: The patient's date of birth is required.
Action: Update the patient's demographics to include the patient's date of birth.

Policies Edit Policy

Insurance	Copay	Certificate	Group
1. Highmark Classic Blue	\$0.00	ZAH1021815767001	416

Patient Demographics

Erin Marie Zeller Patient Information

First Name: Erin Patient Flags:

No Interventions

Diagnoses

Plan

Informant/Relationship

Location: All Locations

Insurance Group: All Insurance Groups

Patient Check-In

Pebbles Flintstone 10 years 6/14/08 F 0/08 F

Insurance Eligibility
 Appt: Well Visit 07/13/18 9:00am Beverly Crusher, MD
 PCP: Mark Williams, M.D.

Eligibility Notes:

Aetna HDHP
 Copay: \$15.00 Cert: 34DFJH Group: Subscriber:
 Status:

Eligibility Response: 07/12/18 Active Request Eligibility

Summary Report

Plan Begin: 01/01/2018
 PROFESSIONAL (PHYSICIAN)
 In Network Benefits:
 \$18 Individual Co-Insurance Visit
 MSG: SPECIALIST

HEALTH BENEFIT PLAN COVERAGE
 In Network Benefits:
 \$5,000 Family Deductible Calendar Year
 MSG: DEDUCTIBLE IS MET WHEN FAMILY AMOUNT IS SATISFIED
 \$9 Family Deductible Remaining
 MSG: DEDUCTIBLE IS MET WHEN FAMILY AMOUNT IS SATISFIED
 \$5,000 Family Deductible Year to Date

Insurance Eligibility
 Appt: 18+ Yr 07/29/21 9:00am Kellney PNP
 PCP: Mich MD

Eligibility Notes:

Horizon Direct Access
 Copay: \$20.00 Cert: ZHQ Group: 00 Subscriber:
 Status:

Eligibility Response: 07/28/21 Eligibility Undetermined Request Eligibility

Alert: The certificate number for the submitted patient does not match the certificate number in the payor's records. (Reject Reason Code 64)
Explanation: The insurance company's record of the certificate differs from what was submitted for this eligibility request.
Action: Verify the patient's certificate number is correct for the patient's policy. Update the policy and resubmit request.

Policies Edit Policy Add Policy Display: Active

Insurance	Copay	Certificate	Group	Start	End	Status
1. Horizon Direct Access	\$20.00	ZHQ	00	07/15/19		Active

UC 2024

Feature Rich: Billing in PCC EHR

Real Time Eligibility

The screenshot displays the PCC EHR interface. On the left, the 'Insurance Eligibility - R' window shows patient information for Abigail Addington, including 'Highmark Classic Blue' insurance and an 'Alert' with an 'Explanation' and 'Action'. The main 'Appointment Book' window shows a 'Sick Call' appointment for Abigail Addington on Wednesday, 04/24/24. A 'Patient Details' window is open, showing 'Insurance Eligibility' information for the patient, including the date (04/24/24), PCP, and a 'Request Eligibility' button. A yellow callout box points to this button with the text: 'Request eligibility from the Patient Details window while scheduling'. The 'Patient Demographics' section of the window lists the patient's name, date of birth, sex, and other details. The bottom left corner features the 'UC 2024' logo, and the bottom right corner has the 'PCC Pediatric EHR Solutions' logo.

Insurance Eligibility - R

Insurance Eligibility
Appt: 18mo Well Visit 07/
PCP: None
Eligibility Notes: Sample n

Highmark Classic Blue
Copoly: \$0.00 Cert: ZAH

Status:

Eligibility Response: Th
Alert: The patient
Explanation: The patient
Action: Update the

Policies

Insurance
1. Highmark Classic

Patient Demographics
Erin Marie Zeller
First Name: Erin

Appointment Book

Provider: Today
Location: Week of Sunday, 04/21/24
Sun-Sat Mon-Fri Day All Day Working

Schedule Appointment Add Block

Abigail Addington 10y 3m 01/01/14 F
Sick Call 15 min

Patient Details

Abigail Addington 10 yrs, 3 mos 01/01/14 F

Insurance Eligibility
Date: 04/24/24
PCP:
Horizon
Copoly: \$20.00 Cert: 0000 Group: 0000 Subscriber: Jason
Eligibility Response: Eligibility Undetermined
Request Eligibility

Patient Demographics

Abigail Addington
Date of Birth: 01/01/14
Sex: Female
Birth History
GA at Birth: Undetermined
Multiple Birth: Undetermined
Race, Ethnicity, and Preferred Language
Race: White
Ethnicity: Not Hispanic or Latino
Pref. Language: English

Patient Information
Patient Flags:
PCP:
Care Center:

Request eligibility from the Patient Details window while scheduling

UC 2024

PCC Pediatric EHR Solutions

Feature Rich: Billing in PCC EHR

Post Charges in the EHR

**UC
2024**

Feature Rich: Billing in PCC EHR

Post Charges in the EHR

PCC EHR Schedule (9) Visit Tasks (8) E-lab Results (6) Rx Queue (0) Messaging (8) Signatures (0)

Find

Tue 01/14/20

Appointments: 9

Visit Status	Room	Tasks	Time	Last	First	DOB/Sex	Visit Reason	Provider	Billing Status	Signed
Gone		UNDO	8:22am	Smith	Baby	04/13/02 M	10yr - 11yr Well Visit	Crusher	Posted	Crusher, Williams
Gone		UNDO	8:30am	Greenawalt	Megan "Meggie" Marilyn	06/16/13 F	Medication Followup	Williams	Posted	Williams
Gone		UNDO	8:35am	Merritt	Zachary	02/03/06 M	10yr - 11yr Well Visit	Crusher	Ready To Post	Crusher, Williams
Gone		UNDO	10:00am	Addington	Abigail	01/20/10 F	Sick Call	Williams	Ready To Post	Williams
w/Nurse	3	END VISIT	11:42am	Baker Jr	Zachary "Zach" Troy	02/16/15 M	10yr - 11yr Well Visit	Crusher		
w/Provider	2	END VISIT	12:32pm	Hudson	Francis	09/25/17 M	2mo Well Visit	Crusher		
w/Nurse	6	END VISIT	12:32pm	Hudson	Walker	11/06/19 M	2mo Well Visit	Crusher		
Scheduled			1:00pm	Soltész III.	Steven "John" Elizabeth	01/01/04 M	16yr Well Visit	Williams		
Scheduled			2:00pm	Apple	Erica L	06/09/10 F	Medication Followup	Williams		

The Billing Status column indicates when a provider makes the visit Ready to Post; the Signed column tells me which clinicians have signed the chart note

Click "Ready to Post" to post charges for this encounter

Visit Status	Room	Tasks	Time	Last	First	DOB/Sex	Visit Reason	Provider	Billing Status	Signed
Gone		UNDO	8:22am	Smith	Baby	04/13/02 M	10yr - 11yr Well Visit	Crusher	Posted	Crusher, Williams
Gone		UNDO	8:30am	Greenawalt	Megan "Meggie" Marilyn	06/16/13 F	Medication Followup	Williams	Posted	Williams
Gone		UNDO	8:35am	Merritt	Zachary	02/03/06 M	10yr - 11yr Well Visit	Crusher	Ready To Post	Crusher, Williams
Gone		UNDO	10:00am	Addington	Abigail	01/20/10 F	Sick Call	Williams	New Items	Williams
w/Nurse	3	END VISIT	11:42am	Baker Jr	Zachary "Zach" Troy	02/16/15 M	10yr - 11yr Well Visit	Crusher		

If a clinician adds items after you posted charges, you can see that in the Billing Status column

No Tasks	04/08/20 4:54pm	Addington, Abigail	Phone Note - Eczema recurrence	None	Ready To Post
No Tasks	04/07/20 9:08am	Jetson, Judy	Phone Note	None	Ready To Post

Feature Rich: Billing in PCC EHR

Post Charges in the EHR

The Billing Status column indicates when a provider makes the visit Ready to bill

Billing History Adda Addington 6 days 7/01/20

--

Billing History Index Search Filter: Search

Date	Provider	Place of Service	Billing Status	Signed	Billing Account	Docs
No Tasks	04/07/20 4:54pm	Addington, Abigail				
No Tasks	04/07/20 9:08am	Jetson, Judy				

Print **Create Encounter** Post Charges View Documents Close Save

Post Charges Adda Addington 6 days 7/01/20

Encounter Details

Provider: Elizabeth Mary Casey, MD
 Place of Service: UVM Medical Center Inpatient
 Admit Date: 07/01/20
 Discharge Date: 07/05/20

Diagnoses

Include Dx on Claim	ICD-10	Description	Linked Procedures
<input checked="" type="checkbox"/>	Z37.0	Single live birth	All None Select

select an ICD-10 diagnosis

If you select a hospital place of service, you can enter an Admit and Discharge Date

Procedures Primary: BCBS Empire

Diagnoses

Include Dx on Claim	ICD-10	Description	Linked Procedures
<input checked="" type="checkbox"/>	Z37.0	Single live birth	99431, 99433, 99238

select an ICD-10 diagnosis

Procedures Primary: BCBS Empire

Procedures	From	To	Units	Price	Insurance	Ins Due	Ins Adj	Pers Due	Discount	Source
<input checked="" type="checkbox"/> 99431 IH Newborn Care Initial H&E	07/01/20	07/01/20	1	130.00	Primary	130.00	0.00	0.00	0.00	Post
Dx: 1) <input checked="" type="checkbox"/> Z37.0 Single live birth										
<input checked="" type="checkbox"/> 99433 IH Newborn Care Subsequent	07/02/20	07/04/20	3	210.00	Primary	210.00	0.00	0.00	0.00	Post
Dx: 1) <input checked="" type="checkbox"/> Z37.0 Single live birth										
<input checked="" type="checkbox"/> 99238 IH Discharge 30 min	07/05/20	07/05/20	1	150.00	Primary	150.00	0.00	0.00	0.00	Post
Dx: 1) <input checked="" type="checkbox"/> Z37.0 Single live birth										
Totals:				490.00		490.00	0.00	0.00	0.00	

select a procedure

Use the buttons to adjust linking, or select diagnoses for each procedure

UC 2024

Feature Rich: Billing in PCC EHR

Post Charges in the EHR

The Billing Status column indicates when a provider makes the visit Ready to

Report Library | Alma Addington | 2 yrs, 6 mos | 1/01/18 | F

Visits by Billing Status

This report identifies visits that are waiting to be billed.

Edit Categories | Billing, User Defined Category, Visit

Provider
 | All Providers

Appointment Date/Time
 Last 30 Days | From 06/08/2024 to 07/08/2024

Visit Reason
 | All Visit Reasons

Location
 All Locations

Billing Status
 All Billing Statuses

Not Ready
 Ready for Posting
 Posted
 New Items

ils

Beverly Crusher, MD
 Burlington Peds - New North End
 07/13/20

diagnosis

Primary: BCBS Empire

Primary: BCBS Empire

Units	Price	Insurance	Ins Due	Ins Adj	Pers Due	Discount	Source
1	15.00	Self Pay	0.00	0.00	15.00	0.00	Post Charges
	15.00		0.00	0.00	15.00	0.00	

Optionally adjust units, price, responsible party for the charge, or the time-of-service discount

am 09_132502005... 0001S1200

| | | | |

filter: | Search

Billing Status	Signed	Billing Account
Inpatient Posted	n/a	Jeffrey Addington (# 1234)

| 1 Item

UC 2024

Feature Rich: Billing in PCC EHR

Post Charges in the EHR

The Billing Status column indicates when a provider makes the visit Ready to

Report Library | Visits by Billing Status

This report identifies visits that are waiting to be billed.

Provider: All
 Appointment Date/Time: From 06/08/2024 to 07/08/2024
 Visit Reason: All
 Location: All
 Billing Status:

Columns: All 9 Displayed | Group By: None | Search Filter:

Provider	Appointment Date/Time	Patient Name	Patient PCC#	Patient DOB	Patient Sex	Visit Reason	Location	Billing Status
Crusher	06/11/2024 12:25pm	Jones, Braz	3446	11/15/2019	M	Sick Call	Winooski Pediatrics	Ready to Post
Crusher	06/11/2024 11:15am	Everitt, Paul	1787	08/12/2011	M	Sick Call	Winooski Pediatrics	Ready to Post
Crusher	06/11/2024 8:30am	Achey D.D.S., Diane "Anthony" Mae	399	05/07/2020	F	Sick Call	Winooski Pediatrics	Ready to Post
Dr. Casey	06/11/2024 8:00am	Mouse, Mickey	3377	01/14/2014	M	Sick Call	Lake Champlain Pediatrics	New Items
Dr. Casey	06/11/2024 1:15pm	Zinn, Andrew J.	2251	07/19/2008	M	Sick Call	Lake Champlain Pediatrics	Ready to Post
Dr. Casey	06/11/2024 4:05pm	Flintstone, Pebbles	3336	05/22/2014	F	Sick Call	Lake Champlain Pediatrics	New Items
Dr. Gomez	06/10/2024 10:30am	Henderson, Rachel E.	1250	04/13/2008	F	Work exam	Lake Champlain Pediatrics	Ready to Post
Dr. Williams	06/09/2024 10:00am	Flintstone, Pebbles	3336	05/22/2014	F	10yr - 11yr Well Visit	Burlington Peds - New North End	Ready to Post
Dr. Williams	06/18/2024 9:30am	Troutman, Dara	2817	11/20/2019	F	Problem	Burlington Peds - New North End	Ready to Post

9 results

Report Library | Back | Schedule | Export | Close | Print

Billing His

Visits

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Provider

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Last 30

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Location

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Print

UC 2024

Feature Rich: Billing in PCC EHR

Post Charges in the EHR

The Billing Status column indicates when a provider makes the visit Ready to

Report Library

Visits by Billing Status

This report identifies visits by billing status.

Provider: All Appointment Date: All Visit Reason: All

Crusher

Crusher

Crusher

Dr. Casey

Dr. Williams

Dr. Williams

All Locations

All Billing Status

Print

9 results

Report Library

PCC EHR

Abigail Addington* PCC# 2503

History

Post Charges: 01/14/20

Patient Details

Appointment Details

Insurance Eligibility

Policies

Account Balances

Patient Demographics

Account Demographics

Post Charges

Post Charges - Patient Details

Appointment Details

Visit Status: w/Provider

Appt Time: 1/14/20 10:00am

Arrival Time: 1/14/20 2:08pm

Visit Reason: Sick Call

Patient Age: 9 yrs, 11 mos

Location: Burlington Peds - New North End

Provider: Mark Williams, M.D.

Appt Note:

Insurance Eligibility

Appt: Sick Call 01/14/20 10:00am Mark Williams, M.D.

PCP: Mark Williams, M.D.

Eligibility Notes: Reviewed and approved for all DOS at

Capital Blue Cross \$10 OV&WC-Other

Copy: \$10.00 Cert: YWP57782605403 Group: A

Status: Validated 01/14/20 [M]

Eligibility Response: **This insurance plan is not confi**

Policies

Insurance	Copay
1. Capital Blue Cross \$10 OV&WC-Other	\$10.00

Account Balances

Jeffrey Addington (Account # 1238)

Aging	0-29 days	30-59 days	60-89 days
Personal	0.00	0.00	

Visit Note

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

01/14/20 - Sick - Bright Futures

Visit signed by Mark Williams, M.D. on 01/14/20 2:16pm

Appointment Details

Appt Time: 01/14/20 10:00am

Arrival Time: 01/14/20 2:08pm

Visit Reason: Sick Call

Patient Age: 9 yrs, 11 mos

Location: Burlington Peds - New North End

Provider: Mark Williams, M.D.

Sick - Bright Futures

Intake

Smoking Status (ARRA)

Never Smoker [Mark Williams, M.D.]

Informant/Relationship

Mom [Mark Williams, M.D.]

Chief Complaint

Severe sore throat, temperature, headaches [Mark Williams, M.D.]

Vitals

Weight: 88 lbs 1 oz 82nd percentile (20.04 kg)

Save

Back Schedule Export Close Print

Review history and patient details

Review and post today's encounter

You can check out signing details, notes, and orders in the separate Visit Note window while you post charges

UC 2024



Feature Rich: Billing in PCC EHR

Post Charges in the EHR

The Billing Status column indicates when a provider makes the visit Ready to

Post Charges

David Deem 15 yrs, 9 mos 2/20/05 M

Appointment Details

Visit Status: Gone Visit Summary:

Appt Time: 12/10/20 1:25pm
Arrival Time: 12/10/20 1:27pm
Visit Reason: Sick Call
Patient Age: 15 yrs, 9 mos
Appt Location: Burlington Peds - New North End
Place of Service:
Appt Provider: Mark Williams, M.D.
Provider of Service:
Appt Note:

Diagnoses

Include Dx on Claim	ICD-10	Description
<input checked="" type="checkbox"/>	J02.0	Streptococ...

You can adjust the encounter's Place of Service and Provider of Service for billing at the top of Post Charges

Visit Note

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

01/14/20 - Sick - Bright Futures

Abigail Addington PCC# 2503
Visit Note: 01/14/20

- Sick - Bright Futures
- Intake**
- History
- Physical Exam
- Diagnoses
- Lab

Visit signed by Mark Williams, M.D. on 01/14/20 2:16pm

Appointment Details

Appt Time: 01/14/20 10:00am
Arrival Time: 01/14/20 2:08pm
Visit Reason: Sick Call
Patient Age: 9 yrs, 11 mos
Location: Burlington Peds - New North End
Provider: Mark Williams, M.D.

Sick - Bright Futures

Intake

Smoking Status (ARRA)
Never Smoker [Mark Williams, M.D.]

Informant/Relationship
Mom [Mark Williams, M.D.]

Chief Complaint

You can check out signing details, notes, and orders in the separate Visit Note window while you post charges

Post Charges

- Appointment Details
- Diagnoses
- Procedures
- Claim Information**
- Payments
- Receipts

Claim Information

Service Provider: Williams PCP: Williams

Billing Provider:
Referring Provider:
EPSDT Referral Indicator:
Prior Authorization Number:
Date First Seen:

Emergency Visit: No Yes
Accident Date:
Auto Accident: No Yes
Accident State:

UC 2024

Feature Rich: Billing in PCC EHR

Post Charges in the EHR

The Billing Status column indicates when a provider makes the visit Ready to Bill

Post Charge

PCC EHR

Appointment: [] FIND

Visit Status: []

Appt Time: []

Arrival Time: []

Visit Reason: []

Patient Age: []

Appt Location: []

Abigail Addington PCC# 2503

History

Post Charges: 01/14/20

Patient Details

Post Charges

Post Charges Abigail Addington 9 yrs, 11 mos 1/20/10 F 1/01/18 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 [All] [None] [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) DETAILS
Totals:		130.00		120.00	0.00	10.00	

select a procedure

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

Procedures

Procedures

- 99213 OV Expanded Focus
- 99213 OV Expanded Focus
- 99213 Camp Exam
- 99213 Daycare Exam
- 99213 Driver's Exam
- 99213-25 +OV Expanded
- 99213 School Exam
- 99213 Sports Exam
- 99213 Work Exam

Totals

Print

Claim Information Service Provider: Williams PCP: Williams

Prior Authorization Number: []

Date First Seen: []

Payments

Receipts

9 results

Report Lib

Save



Feature Rich: Billing in PCC EHR

Post Charges in the EHR

The Billing Status column indicates when a provider makes the visit Ready to

Diagnoses

Include Dx on Claim	ICD-10	Description	Linked Procedures
<input checked="" type="checkbox"/>	J02.0	Streptococcal pharyngitis SNOMED: Streptococcal sore throat	99213, 87880

Link Procedures to a Diagnosis

Diagnosis: J02.0 Streptococcal pharyngitis

Select	CPT	Description
<input checked="" type="checkbox"/>	99213	OV Expanded Focus
<input checked="" type="checkbox"/>	87880	Rapid Strep Screen

Procedures

Procedures	Units	Price	Insurance	Ins Due	Ins Adj	Pers Due	Source
99213 OV Expanded Focus	1	100.00	Primary	90.00	0.00	10.00	Electronic Encounter Form
99213-2 Rapid Strep Screen	1	30.00	Primary	30.00	0.00	0.00	Lab (Ordered) DETAILS
Totals:		130.00			0.00	10.00	

Callouts:

- Click and drag to change primary diagnosis
- Adjust units, responsible party, and personal due

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PCC
Pediatric EHR Solutions

Feature Rich: Billing in PCC EHR

Post Charges in the EHR

The Billing Status column indicates when a provider makes the visit Ready to

Diagnoses

Include Dx on Claim	ICD-10	Description	Linked Procedures
<input checked="" type="checkbox"/>	J02.0	Streptococcal pharyngitis SNOMED: Streptococcal sore throat	99213, 87880

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

Linked Procedures
99213, 87880

Link Procedures to a Diagnosis

Link Procedures to a Diagnosis

Post Charges

- Appointment Details
- Diagnoses
- Procedures
- Claim Information
- Payments**
- Receipts

Payments

Jeffrey Addington (Account # 1238)

Patient	Visit Reason	Insurance	Pers Due	Description
Abigail Addington	Sick Call	Capital Blue Cross \$10 OV&WC-Other	10.00	Today's Visit
			207.00	Previous Balance (as of 01/14/20)
			0.00	Payment
			217.00	Balance

Payment Type	Amount	Check #	Apply to Today's Visit	Apply to Prev Bal U
	217.00		10.00	207.00

Add Payment

Cancel Save

Totals: 130.00 responsible party, and personal due 0.00 10.00

Personal due for this encounter

Total of previous personal balance for the patient's guarantor account

Payment posted during Patient Check-In

responsible party, and personal due

Feature Rich: Billing in PCC EHR

Post Charges in the EHR

The Billing Status column indicates when a provider makes the visit Ready to Bill

Diagnoses

Include Dx on Claim	ICD-10	Description
<input checked="" type="checkbox"/>	J02.0	Streptococcal pharyngitis SNOMED: Streptococcal sore throat

Link Procedures to a Diagnosis

Visit Reason

Patient Age

Post Charges

- Appointment Details
- Diagnoses
- Procedures
- Claim Information
- Payments**
- Receipts

Payments

Jeffrey Addington

Patient

Abigail Addington

Payment Type

Add Payment

Burlington Peds - New North End
45 North Avenue
Burlington, VT 05401
802-863-9988
Tax ID: 11-1111111

Abigail Addington
DOB: 05/27/10
Sex: Female
PCC #: 2503

Billing Account
Jeffrey Addington
730 Grandview Drive
Saint Albans Bay, VT 05481

Primary Insurance Policy
Capital Blue Cross \$10 OV&WC-Other
Certificate: YWP57782605403
Group: Add128

Time of Service Receipt 05/04/20

Encounter Details
Visit Date: 05/04/20
Provider: Mark Williams, M.D.
Place of Service: Burlington Peds - New North End

Diagnoses
J02.0 Streptococcal pharyngitis

Procedures	Price
99213-25 +OV Expanded 1)J02.0	100.00
87880 Rapid Strep Screen 1)J02.0	30.00
Total:	130.00

Payments
207.00 TOS Check Payment
10.00 TOS Cash Payment

9 yrs, 11 mos 1/20/10 F /01/18 F

Apply to Prev Bal U

207.00 0.00

0.00 10.00

Save

Personal due for this encounter

Total of previous personal balance for the patient's guarantor account

Payment posted during Patient Check-In

UC 2024

Feature Rich: Billing in PCC EHR

Review Billing History in the EHR

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2024**

Feature Rich: Billing in PCC EHR

Review Billing History in the EHR

PCC EHR

FIND

Hannah Taglang PCC# 1239

Medical Summary

Demographics

History

- Visit History
- Immunization History
- Flowsheets
- Growth Charts
- Documents
- Billing History**

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

04/16/16 Alfred Woodward, M.D., Winooski Pediatrics

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

Primary Insurance Policy:
~BCBS \$10 Custom Blue-QAC,QAF
Certificate: QAF207526436
Group: Tag43

Diagnoses:
465.9 URI

Procedures:
99213 1 OV Expanded Focus \$48.00
1)465.9

Total: \$48.00

Claim Information:
Billing Provider: Alfred Woodward, M.D.

Payments:
48.00 TOS Check Payment
48.00 TOS Check Payment

Claim Batched:
BCBS claim batched 04/16/16

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)	

Select an encounter in the Billing History Index to review details in the window above

Procedures:

CPT	Units	Description	Amount	Diagnoses
87880	1	Rapid Strep Screen	27.00	R05
		07/20/21 Ins Prmt - BCBS \$10copay	(16.13)	
		07/20/21 Ins Adj - BCBS \$10copay	(10.87)	
99214	1	OV Detailed H&E	87.00	R05
		07/03/21 TOS Cash Payment	(10.00)	
		07/20/21 Ins Prmt - BCBS \$10copay	(70.72)	
		07/20/21 Ins Adj - BCBS \$10copay	(6.28)	
Totals:			Charges: 114.00	
			TOS Cash Payment: (10.00)	
			Ins Prmt - BCBS \$10copay: (86.85)	
			Ins Adj - BCBS \$10copay: (17.15)	
			Balance: 0.00	

Feature Rich: Billing in PCC EHR

Personal Payments in the EHR

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Feature Rich: Billing in PCC EHR

Personal Payments in the EHR

The screenshot displays the PCC EHR interface. The main window has a menu bar with 'PCC EHR', 'File', 'Edit', 'Reports', 'Tools', 'Configuration', 'Window', and 'Help'. The 'Tools' menu is open, showing options: 'Immunization Registry Response Viewer', 'Insurance Eligibility', 'Patient Portal Administration', and 'Payments' (highlighted). Below the menu, there's a search bar with 'PCC EHR' and a 'FIND' button. A sidebar on the left shows 'Visit Status' with buttons for 'Scheduled', 'Arrived', and 'Scheduled'. A 'Payments' dialog box is open, featuring a search for 'flin' and a table of results.

Payments Account Finder Patient Finder

Account Finder

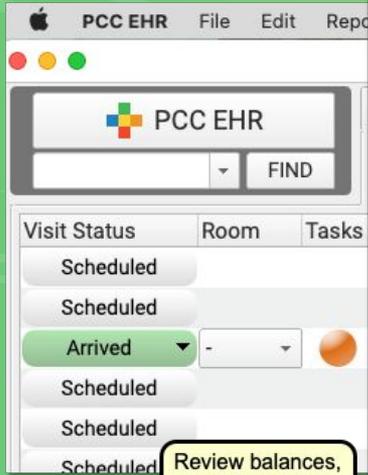
flin

Results for Name: flin

Last	First	Last Service	Address	Account #	Account Flags	Dependents
Flintstone	Wilma		15 Quarry Lane, Winooski, VT	1981	Budget	Dino Flintstone, Pebbles Flintstone
Flintstone	Fred	01/15/24	1400 Rock Road, Winooski, VT	1980		Dino Flintstone, Pebbles Flintstone

Feature Rich: Billing in PCC EHR

Personal Payments in the EHR



Review balances, demographics, account notes, and more

Payments

Fred Flintstone (Account # 1980)

Pers Due	Description
160.00	Previous Balance (as of 07/20/21 12:37pm)
0.00	Unsaved Payments
160.00	Balance

Transaction Date Payment Type Amount Check # Apply to Prev Bal Unapplied Provider

07/20/21 | | 0.00 | 0.00 0.00

Save Payment Print Receipt

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	160.00	0.00	0.00	0.00	0.00	0.00	160.00
Insurance	15.00	0.00	0.00	0.00	64.00	0.00	79.00
Medicaid	0.00	0.00	0.00	0.00	0.00	0.00	0.00

▶ Encounters with Outstanding Personal Balances

Account Demographics

Billing Account
 Fred Flintstone (Account # 1980)
 First Name: Fred
 Last Name: Flintstone

Billing Account Information
 Account Flags:
 EMG Contact: Wilma

Cancel Save Save + Exit

Feature Rich: Billing in PCC EHR

Personal Payments in the EHR

PCC EHR File Edit Rep

Payments Fred Flintstone Account #1980 1400 Rock Road

Fred Flintstone Home Phone: 802-555-0105
 1400 Rock Road Work Phone: 802-555-0146
 Wisconsin, VT 05404 Cell Phone: 802-555-0112

Fred Flintstone (Account # 1980)

Transaction Date	Payment Type	Amount	Check #	Apply to Prev Bal	Unapplied	Provider
03/18/22	Personal Check Payment	161.00	1010101	161.00	0.00	

▼ Distribution

Date	Patient	Code	Description	Charge	Personal Due	Distribution	Balance
08/07/21	Abigail Addington	99213	OV Expanded Focus	56.00	46.00	46.00	0.00
08/16/21	Abigail Addington	99214	OV Detailed H&E	87.00	87.00	87.00	0.00
		81000	Urinalysis with Microscopy	13.00	13.00	13.00	0.00
08/16/21	Nathaniel Addington	99213	OV Expanded Focus	56.00	46.00	15.00	31.00
09/04/21	Abigail Addington		Missed Appointment Fee	15.00	15.00	0.00	15.00
Totals:					207.00	161.00	46.00

Save Payment **Print Receipt**

Distribution total must equal the Apply to Previous Balance amount.

Optionally change how the money will be applied to charges

▶ Encounters with Outstanding Personal Balances

Account Demographics

Billing Account
 Fred Flintstone (Account # 1980)
 First Name: Fred
 Last Name: Flintstone

Billing Account Information
 Account Flags:
 EMG Contact: Wilma
 EMG Phone #:

Cancel **Save** **Save + Exit**

Feature Rich: Billing in PCC EHR

Personal Payments in the EHR

Payments
Fred Flintstone (Account # 1980)

Pers Due Description

160.00 Previous Balance (as of 07/14/21 11:04am)
-140.00 Posted - Personal Check Payment 12345 (07/14/21)
 ▼ Applied to Previous Balance: 140.00

10.00	applied to 06/29/20	Pebbles Flintstone 92551	Hearing Screen	Elizabeth Mary Casey,
10.00	applied to 06/29/20	Pebbles Flintstone 99173	Vision Screen	Elizabeth Mary Casey,
7.00	applied to 06/29/20	Pebbles Flintstone 99393	Well Child 5-11 yrs	Elizabeth Mary Casey,
64.00	applied to 02/17/21	Pebbles Flintstone 99213	OV Expanded Focus	James Davidson, Jr. M
27.00	applied to 07/13/21	Pebbles Flintstone 87880	Rapid Strep Screen	Elizabeth Mary Casey,
22.00	applied to 07/13/21	Pebbles Flintstone 87880	Rapid Strep Screen	Elizabeth Mary Casey,

0.00 Unsaved Payments

20.00 Balance

Transaction Date	Payment Type	Amount	Check #	Apply to Prev Bal
07/14/21		0.00		0.00

Save Payment **Print Receipt**

Account #1980 1400 Rock Road

Home Phone: 802-555-0105
Work Phone: 802-555-0146
Cell Phone: 802-555-0112

PCC Pediatric Test Associates
20 Winooski Falls Way, Suite 7
Winooski, VT 05404-2228
(800) 722-7708

Billing Account
Fred Flintstone
1400 Rock Road
Winooski, VT 05404

Payments

Date	Payment	Amount			
07/14/21	Personal Check Payment 12345	(148.00)			
	Applied to:	7.00	06/29/20	Pebbles	Well Child 5-11 yrs
		18.00	06/29/20	Pebbles	Vision Screen
		18.00	06/29/20	Pebbles	Hearing Screen
		64.00	02/17/21	Pebbles	OV Expanded Focus
		22.00	07/13/21	Pebbles	Rapid Strep Screen
		27.00	07/13/21	Pebbles	Rapid Strep Screen

Account Demographics

Billing Account
Fred Flintstone (Account # 1980)
First Name: Fred
Last Name: Flintstone

Billing Account Information
Account Flags:
EMG Contact: Wilma
EMG Phone #:

Cancel Save Save + Exit



Feature Rich: Billing in PCC EHR

Personal Payments in the EHR

Payments
Fred Flintstone (Account #1980)

Pers Due Description

160.00 Previous

-140.00 Posted

▼ Applied

10.00

10.00

7.00

64.00

27.00

22.00

0.00 Unsaved

20.00 Balance

Transaction Date P

07/14/21

Save Payment Pr

Payments Fred Flintstone Account #1980 1400 Rock Road

Posting History

Account Balances Print

Fred Flintstone (Account # 1980)

Aging	0-29 days	30-59 days	60-89 days	90-119 days	120+ days	Credit	Total Balance
Personal	12.00	0.00	0.00	0.00	0.00	0.00	12.00
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:

Fred Flintstone (Account # 1980)

Transaction Date	Amount	Payment Type	Check Number	Refunds/Reversals	Unapplied Amount
06/12/24	1.00	Ins Pmt - Aetna			0.00
1.00 Ins Pmt - Aetna Applied to:					
06/11/24	1.00	Pebbles Flintstone	99211	OV Minimal Elizabeth Mary Casey, MD	
06/12/24	2.00	Ins Pmt - Amerihealth			0.00
2.00 Ins Pmt - Amerihealth Applied to:					
06/11/24	2.00	Pebbles Flintstone	99211	OV Minimal Elizabeth Mary Casey, MD	
06/11/24	60.00	Master Card Payment			15.00
60.00 Master Card Payment Applied to:					
01/17/24	15.00	Dino Flintstone	99213	OV Expanded Focus James Davidson, Jr. M.D.	
01/17/24	15.00	Pebbles Flintstone	99213	OV Expanded Focus James Davidson, Jr. M.D.	
06/11/24	15.00	Dino Flintstone	99211	OV Minimal Elizabeth Mary Casey, MD	
Unapplied:	15.00			Elizabeth Mary Casey, MD	
07/15/23	10.00	Visa Card Payment			0.00
10.00 Visa Card Payment Applied to:					
04/02/23	10.00	Dino Flintstone	99392	Well Child 1-4 yrs Elizabeth Mary Casey, MD	
06/10/23	68.00	Ins Pmt - Cigna PPO			0.00
05/29/23	20.00	Visa Card Payment			0.00
05/05/23	34.74	Ins Pmt - Cigna PPO			0.00
	10.26	Ins Adj - Cigna PPO			0.00

Print Receipt Refund Credits Reverse Payment Edit Close

Well Child 5-11 yrs

Vision Screen

Hearing Screen

OV Expanded Focus

Rapid Strep Screen

Rapid Strep Screen

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Feature Rich: Billing in PCC EHR

Personal Payments in the EHR

Payments

Account #1980 1400 Rock Road

Payment History Search Filter:

Transaction Date	Amount	Payment Type	Check Number	Unapplied Amount
05/05/22	60.00	Master Card Payment		30.00
Applied to:				
12/10/21	15.00	Dino Flintstone	OV Expanded Focus James Davidson, Jr. M.D.	
12/10/21	15.00	Pebbles Flintstone	OV Expanded Focus James Davidson, Jr. M.D.	
Unapplied:				30.00
06/07/21	10.00	Visa Card Payment		0.00
05/03/21	68.00	Ins Pmt - Cigna PPO		0.00
06/11/24	1.00	Pebbles Flintstone	Elizabeth Mary Casey, MD	
06/12/24	2.00	Ins Pmt - Amerihealth Applied to:		
06/11/24	2.00	Pebbles Flintstone 99211	OV Minimal Elizabeth Mary Casey, MD	
06/11/24	60.00	Master Card Payment		15.00
60.00 Master Card Payment Applied to:				
01/17/24	15.00	Dino Flintstone 99213	OV Expanded Focus James Davidson, Jr. M.D.	
01/17/24	15.00	Pebbles Flintstone 99213	OV Expanded Focus James Davidson, Jr. M.D.	
06/11/24	15.00	Dino Flintstone 99211	OV Minimal Elizabeth Mary Casey, MD	
Unapplied:				15.00
07/15/23	10.00	Visa Card Payment		0.00
10.00 Visa Card Payment Applied to:				
04/02/23	10.00	Dino Flintstone 99392	Well Child 1-4 yrs Elizabeth Mary Casey, MD	
06/10/23	68.00	Ins Pmt - Cigna PPO		0.00
05/29/23	20.00	Visa Card Payment		0.00
05/05/23	34.74	Ins Pmt - Cigna PPO		0.00
	10.26	Ins Adj - Cigna PPO		0.00

22.00
0.00 Unsaved
20.00 Balance

Transaction Date P
07/14/21

Save Payment Pr

\$30 of this \$60 payment is unapplied

Total Balance 12.00
254.00
0.00

Search Filter:

Unapplied Amount 0.00

Well Child 5-11 yrs
Vision Screen
Hearing Screen
OV Expanded Focus
Rapid Strep Screen
Rapid Strep Screen

Print Receipt Refund Credits Reverse Payment Edit Close

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Feature Rich: Billing in PCC EHR

Personal Payments in the EHR

The screenshot displays the PCC EHR Billing interface. A 'Payments' window is open, showing a 'Payment History' table for Jeffrey Addington, Account #1238, 730 Grandview Drive. The table lists transactions with columns for Transaction Date, Amount, Payment Type, Check Number, Refunds/Reversals, and Unapplied Amount. A 'Reverse Payment' button is highlighted with a red circle. Below the table, a 'Payment History - Reverse Payment' dialog is open, showing a 'Reversal' entry for 10/12/22, 'Returned Check' for (207.00), and a 'Fee' entry for 10/12/22, 'Returned Check Fee' for 25.00. The 'Reverse Payment' button is also highlighted in the dialog. The background shows a 'Payment History' table with a search filter and buttons for 'Print Receipt', 'Refund Credits', 'Reverse Payment', 'Edit', and 'Close'. The 'Reverse Payment' button is highlighted with a red circle. The 'Payment History' table in the background has the following data:

Transaction Date	Amount	Payment Type	Check Number	Refunds/Reversals	Unapplied Amount
10/01/22	207.00	Personal Check Payment			0.00
08/15/22	81.59	Ins Pmt - Capital Blue Cross	100538215		0.00
			100538215		0.00
					0.00
					0.00

The 'Payment History - Reverse Payment' dialog shows the following data:

Payment:	Transaction Date	Payment Type	Amount
	10/01/22	Personal Check Payment	207.00
		► Distribution	

Reversal:	Transaction Date	Transaction Type	Amount
	10/12/22	Returned Check	(207.00)
		► Distribution	

Fee:	Transaction Date	Transaction Type	Amount
	10/12/22	Returned Check Fee	25.00

The background 'Payment History' table has the following data:

Transaction Date	Amount	Payment Type	Check Number	Refunds/Reversals	Unapplied Amount
10/01/22	207.00	Personal Check Payment		10/12/22 Returned Check 10/12/22 Returned Check Fee 25.00	0.00
08/15/22	81.59	Ins Pmt - Capital Blue Cross	100538215		0.00
08/15/22	3.41	Ins Adj - Capital Blue Cross	100538215		0.00
06/17/22	0.00	Ins Pmt - Capital Blue Cross			0.00
05/28/22	10.00	TOS Cash Payment			0.00

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Feature Rich: Billing in PCC EHR

Personal Payments in the EHR

Payments

Jeffrey Addington Account #1238 730 Grandview Drive

Posting History

Account Balances

Jeffrey Addington (Account # 1238)

Aging	0-29 days	30-59 days	60-89 days	90-119 days	120+ days	Credit	Total Balance
Personal	0.00	0.00	0.00	0.00	0.00	-10.00	-10.00
Insurance	0.00	0.00	0.00	0.00	0.00	0.00	0.00
							0.00

Transaction Date Refund Type Amount Balance

10/12/22 Refund-Personal 0.00 -10.00 CR

Account Balances

Jeffrey Addington (Account # 1238)

Aging	0-29 days	30-59 days	60-89 days	90-119 days	120+ days	Credit	Total Balance
Personal	0.00	0.00	0.00	0.00	0.00	-10.00	0.00
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

Payment History - Refund Credit

Transaction Date Amount Payment Type Check Number Refunds/Reversals Unapplied Amount

10/01/22 207.00 Personal Check Payment 0.00

08/15/22 81.59 Ins Pmt - Capital Blue Cross 100538215 0.00

08/15/22 3.41 Ins Adj - Capital Blue Cross 100538215 0.00

06/17/22 0.00 Ins Pmt - Capital Blue Cross 0.00

05/28/22 20.00 TOS Cash Payment 10/12/22 Refund-Personal 0.00

Applied to:

05/29/22 10.00 Abigail Addington Well Child 5-11 yrs Elizabeth Mary Casey, MD

10/12/22 10.00 Refund-Personal None

05/22/22 11.16 Ins Pmt - Capital Blue Cross 100474255 0.00

Print Receipt Refund Credits Reverse Payment

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Feature Rich: Billing in PCC EHR

Work with Claims in the EHR

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Feature Rich: Billing in PCC EHR

Work with Claims in the EHR

Submission	Needs Correction (0)	Log	Holds	Delay
------------	----------------------	-----	-------	-------

Claims - Submission - Claims Prepared

Selected Batches:

Prepared Claims:
1168 Claim prepared to submit
0 Claims prepared to route to paper

Claims That Will Not Be Submitted:
8 Claims held
3 Claims delayed
6 Claims need corrections

Feature Rich: Billing in PCC EHR

Work with Claims in the EHR

Submission Need Corrections (0) Log

Claims - Submission Session Log - View

Session: 10/26/2022 10:18am Annette Biller

am - 12 Batches (1339 Claims) Search Filter:

Date of Service	Insurance Plan	Electronic Batch	Claim Id
09/01/22	Fake Insco Inc. Plan of Coverage	PCC - Claims Batch	1575506
09/01/22	Fake Insco Inc. Plan of Coverage	PCC - Claims Batch	1575505
09/02/22	Fake Insco Inc. Plan of Coverage	PCC - Claims Batch	1575314
09/01/22	Fake Insco Inc. Plan of Coverage	PCC - Claims Batch	1575425
08/30/22	Fake Insco Inc. Plan of Coverage	PCC - Claims Batch	1575713
09/09/22	Fake Insco Inc. Plan of Coverage	PCC - Claims Batch	1575826
08/26/22	Fake Insco Inc. Plan of Coverage	PCC - Claims Batch	1575727
09/09/22	Fake Insco Inc. Plan of Coverage	PCC - Claims Batch	1575091
08/31/22	Fake Insco Inc. Plan of Coverage	PCC - Claims Batch	1575090
09/02/22	Fake Insco Inc. Plan of Coverage	PCC - Claims Batch	1574842
09/09/22	Fake Insco Inc. Plan of Coverage	PCC - Claims Batch	1574954
08/30/22	Fake Insco Inc. Plan of Coverage	PCC - Claims Batch	1575125

Patient, Random B
Patient, Random C
Patient, Random A
Patient, Random B
Patient, Random C
Patient, Random A
Patient, Random B
Patient, Random C

Submission Need Corrections (0) Log

Claims - Submission Session Log - View

Session: 10/26/2022 10:18am Annette Biller

Submitted 10/26/22 10:20am - 12 Batches (1339 Claims)
Submitted 10/26/22 10:20am - 12 Batches (1339 Claims)
Held (8 Claims)
Delayed (3 Claims)
Needed Corrections (4 Claims)

Insurance Plan
e Card PPO 20 Nept

Back

Feature Rich: Billing in PCC EHR

Work with Claims in the EHR

Submission Needs Correction (14) Log Holds **Delay**

Claims - Delay

Select the number of days after the date of service to delay all claims.

Delay all claims for: days

Search Filter:

Electronic Batch	Claim Id
PCC - Claims Batch	1575506
PCC - Claims Batch	1575505
PCC - Claims Batch	1575314
PCC - Claims Batch	1575425
PCC - Claims Batch	1575713
PCC - Claims Batch	1575826
PCC - Claims Batch	1575727
PCC - Claims Batch	1575091
PCC - Claims Batch	1575090
PCC - Claims Batch	1574842
PCC - Claims Batch	1574954
PCC - Claims Batch	1575125

Feature Rich: Billing in PCC EHR

Work with Claims in the EHR

Submission Needs Correction (6) Log **Holds** Delay

Claims - 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: Hold all Geissinger HMO claims
Dates of Service: 01/01/24 - 12/31/24
Billing Providers: All Providers
Places of Service: All Places of Service
Insurance Plans: ▶ 5 Insurance Plans
Modified: Mark Williams, M.D. 05/01/24 12:16pm

Claim Hold Index

Description	Dates of Service	Billing Providers	Places of Service	Insurance Plans	Modified
Dr. Crusher Credentialing	01/01/24 - 01/01/26	1 Provider	All Places of Service	350 Insurance Plans	Mark Williams, M.D. 05/01/24 12:15pm
Hold all Geissinger HMO claims	01/01/24 - 12/31/24	All Providers	All Places of Service	5 Insurance Plans	Mark Williams, M.D. 05/01/24 12:16pm

Add Delete Edit Close

Submission
Claims -
Session: 10/2
Submitted 1
Submitted 1
Held (3 Claims)
Delayed (3 Claims)
Needed Cor

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Feature Rich: Billing in PCC EHR

Work with Claims in the EHR

Submission **Needs Correction (6)** Log Holds Delay

Claims - Needs Correction

The claims below could not be submitted and require one or more corrections.

Status: Needs Correction Search Filter:

Claim Status	Patient	Date of Service	Insurance Plan	Reason
Needs Correction	Hostettler, Amanda (PCC# 2482)	11/01/19	Aetna PPO \$0	The policy "Aetna PPO \$0" is not active for the date(s) of service.
Needs Correction	Flintstone, Pebbles (PCC# 3336)	04/01/16	Aetna HDHP	The policy "Aetna HDHP" is not active for the date(s) of service.
Needs Correction	Orlando, Rodger Growth (PCC# 4017)	04/18/19	Aetna HDHP	The policy's certificate number has fewer than 2 characters.
Needs Correction	Flintstone, Dino (PCC# 3335)	11/01/19	Aetna HDHP	The policy "Aetna HDHP" is not active for the date(s) of service.
Needs Correction	Flintstone, Pebbles (PCC# 3336)	11/16/19	Aetna HDHP	The policy "Aetna HDHP" is not active for the date(s) of service.
Needs Correction	Orlando, Rodger Growth (PCC# 4017)	02/23/23	Aetna HDHP	The policy's certificate number has fewer than 2 characters.

Validate Delete Claim Close Open

Add Delete Edit Close

Submission

Claims -

Session: 10/2

- Submitted 1
- Submitted 1
- Held (8 Claims)
- Delayed (3 Claims)
- Needed Cor

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Feature Rich: Billing in PCC EHR

Work with Claims in the EHR

Submission Needs Correction (6) Log Holds Delay

Needs Correction - Rodger Growth Orlando (PCC# 4017) Status: Needs Correction

Date of Service: 02/23/23
Insurance Plan: Aetna HDHP
Reason: The policy's certificate number has fewer than 2 characters.
Instructions: Edit the patient's policy and enter a valid certificate number.

- ▶ Patient Demographics
- ▶ Account Demographics
- ▶ Insurance Policies

Demographics Documents Billing History Correct Mistakes Previous Next Close

Add Delete Edit Close

Claims -
Session: 10/2
Submitted 1
Submitted 1
Held (3 Claims)
Delayed (3 Claims)
Needed Cor

The reason the claim can't be submitted, along with suggested fixing instructions

Feature Rich: Billing in PCC EHR

Work with Claims in the EHR

Demographics

Documents

Billing History

Correct Mistakes

Previous

Next

Close

Claims -
 Session: 10/2
 Submitted 1
 Submitted 1
 Held (8 Clai
 Delayed (3 C
 Needed Cor

PCC EHR

FIND

Rodger Orlando* PCC# 4017

Medical Summary

Demographics

- Patient Demographics
- Communication Preferences
- Account Demographics
- Personal Contacts
- Policies**
- Insurance Eligibility
- Siblings
- Patient Portal Users
- Account Balances
- Forms

History

Demographics Rodger Growth Orlando 11 yrs, 9 mos 07/09/12 M

Policies

Insurance	Copay	Certificate	Group
1. Aetna HDHP	\$15.00		

Insurance Eligibility

Edit Policy

Edit Policy

Insurance: Aetna HDHP

Copay: \$15.00

Certificate:

Group:

Start Date:

End Date:

Subscriber:

First Name:

Last Name:

Date of Birth:

Sex:

Address:

Employer:

Add Attachment

ITEM	PATIENT	PROCEDURE	DIAG	SVC	BIL	AMOUNT	SUM DUE
02/23/23							
21)	PC Rodger Growt E1399	Ace Bandage	X34.XXXS	c	c	10.00	8.00
22)	04/18/24	Aetna HDHP claim batched					
23)	02/23/23	TOS Discount			c	2.00	
03/20/22							
24)	P Frank E1399	Ace Bandage	E71.111+			10.00	10.00
04/24/24 Aetna MC & Elect claim deleted							
25)	04/18/24	Aetna MC & Elect claim batched					
02/16/22							
26)	Rodger	99391-25 Mod PE under	Z00.129	W	W	0.00	0.00
27)	Rodger	90680 RotaTeq	Z00.129	W	W	110.00	110.00
28)	Rodger	99174-59 Mod S9 Ocular	Z00.129	W	W	0.00	0.00
29)	Rodger	90460 Immuniz Admin W/	Z00.129	W	W	30.00	30.00
30)	Rodger	90461 Immuniz Admin W/	Z00.129	W	W	20.00	20.00
31)	Rodger	90461 Immuniz Admin W/	Z00.129	W	W	20.00	20.00
32)	Rodger	90461 Immuniz Admin W/	Z00.129	W	W	20.00	20.00
33)	Rodger	96110 Developmental T	Z23	W	W	80.00	80.00
34)	Rodger	96161 Health risk scre	Z23	W	W	0.00	0.00
35)	Rodger	90698 DTaP/Hib/IPV	Z00.129	W	W	0.00	0.00
36)	Rodger	90670 Prevnar 13	Z00.129	W	W	170.00	99.50
37)	02/23/23	TOS Check Payment			W	11.00	
Personal: \$ 677.50 Correcting Orlando J Orlando (# 5814). Insurance: \$1989.00 There are 21 more items. Medicaid: \$ 0.00							

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Create Visit

EDITING

Add Phone Note

Add Portal Message

Close

Save

Save + Exit

Add

Delete

Edit

Close

Feature Rich: Billing in PCC EHR

Work with Claims in the EHR

The screenshot displays the PCC EHR interface. At the top, there are navigation tabs for 'Demographics', 'Documents', and 'Billing History'. The 'Billing History' tab is active, showing a table of claims. A modal dialog box titled 'Confirmation - Delete Claim' is open, displaying the following information:

Confirmation - Delete Claim

Claim Details
Patient: Orlando, Rodger Growth (PCC# 4017)
Date of Service: 02/23/23
Insurance Plan: Aetna HDHP
Reason: The policy "Aetna HDHP" is not active for the date(s) of service.

Deleting will prevent this claim from being submitted.
To refile a claim for this encounter, make corrections and generate a new claim.

Buttons: Cancel, Delete Claim

The background interface shows the 'Demographics' section for 'Rodger Orlando* PCC# 4017'. It includes a 'Policies' list with '1. Aetna HDHP' selected, and an 'Insurance Eligibility' section with 'Edit Policy' options. The 'Subscriber' information is also visible, including name, address, and date of birth.

Feature Rich: Billing in PCC EHR

Post Insurance Payments in the EHR

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Feature Rich: Billing in PCC EHR

Post Insurance Payments in the EHR

Insurance Payments - Finder

Find insurance charges by claim ID or patient.

Claim ID:

Patient:

Insurance Payments

Pebbles Flintstone 10 years 08/18/13 F

Posting: History (Wilma Flintstone) History (Fred Flintstone)

Patient Flags: Adoption, Burlington Pediatrics
Account Flags: CONFIDENTIALITY

Encounters:

Dates of Service	Provider	CPT	Charge Amount	Expected Copay	Pending Insurance	Current Insurance	Claim ID
09/10/23	Crusher	99291	400.00		400.00	Aetna HDHP	
09/08/23	Casey	99211	30.00	15.00	15.00	Aetna HDHP	
		87880	27.00		27.00		
		87880	27.00		27.00		
09/08/23	Casey	99211	30.00	15.00	15.00	Aetna HDHP	
04/15/23	Davidson	99213	79.00	15.00	64.00	Aetna HDHP	100, 106
08/25/22	Casey	99393	95.00	20.00	7.00	Cigna PPO \$20	93
		99173	10.00		10.00		93
		92551	10.00		10.00		93

You can review the entire payment history for any account that has had charges for this patient

Insurance Payments - Finder

Find insurance charges by claim ID or patient.

Claim ID:

Patient:

If you don't have the claim ID, you can find patients by name, birthdate, or other search criteria

Search Results for Name: add

Last	First	DOB/Sex	Age	PCC #	PCP	Patient Flags
Addington	Abigail	05/16/13 F	9y 11m	2503	Williams	Chronic, Burlington ...
Addington	Michael	11/09/09 M	13y 5m	2887		Records
Addington	Nathaniel	01/13/06 M	17y 3m	3087		
Addington 3rd	Winston Barnaby	03/23/40 M	83y 1m	4033		

Feature Rich: Billing in PCC EHR

Post Insurance Payments in the EHR

Insurance Payments - Finder

Insurance Payments

Posting History (Roderick Quarry)

Patient Flags:
Account Flags:

Insurance Payment:

Transaction Date: 05/08/23
Check Number: 12121212
Distribution: 555555

Date of Service: 08/15/23
CPT: 99213
Charge Amount: 56.00
Expected Copay: 10.00

Payment Type: **Ins Pmt**
Adjustment Type: Ins Adj

Current Policy: Health Assurance Healthstyles \$10
Next Policy: Personal

Personal ▶ CARC: Covered Amount

Balance Code: 3

The Insurance Payments tool will remember check details so you can easily post payments for all the encounters on an ERA

Date of Service	CPT	Charge Amount	Expected Copay	Penalty	Insurance
08/15/23	99213	56.00	10.00		

- Ins Pmt
- Cap Pmt HealthGuard
- Cap Pmt Health One
- Cap Pmt Keystone
- Collection Payment
- Ded Not Met-Ins Pmt
- Insurance Overpayment
- Integral-Non Billable-Ins Pmt
- Max Benefits Pd-Ins Pmt
- Medicaid Payment

Feature Rich: Billing in PCC EHR

Post Insurance Payments in the EHR

Insurance Payments - Finder

Insurance Payments - Finder

Insuran

Distribution:

Distribution:

Date of Service	CPT	Charge Amount	Expected Copay	Pending Insurance	Payment	Adjustment	Personal Balance	▼ CARC: Code	Group	Amount	Covered Amount	Negotiated Rate
12/20/22	99393	100.00	5.00	95.00	81.00	14.00	0.00	3	PR	5.00	86.00	88.00
12/20/22	90658	20.00	0.00	20.00	18.00	2.00	0.00				18.00	18.00
Totals:		120.00	5.00	115.00	99.00	16.00	0.00				104.00	106.00

- Integral-Non Billable-Ins Pmt
- Max Benefits Pd-Ins Pmt
- 21 Medicaid Payment

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Feature Rich: Billing in PCC EHR

Post Insurance Payments in the EHR

The screenshot displays the 'Insurance Payments' window in the PCC EHR system. The window title is 'Insurance Payments' and it shows patient information: 'Pebbles Flintstone', '10 years', '08/18/13', and 'F'. The window is divided into several sections:

- Insurance Payments:** Includes 'Patient Flags' (Chronic, Burlington), 'Account Flags', and 'Insurance Payment' details (Transaction Date: 05/08/23, Check Number: 55555).
- Distribution:** A table showing service dates and charges. Totals: 120.00.
- Policies:** A list of policies, including '1. Capital Blue Cross \$10'.
- Patient Demographics:** Patient name 'Abigail Addington', first name 'Abigail', middle name, last name 'Addington', and date of birth '05/16/13'.
- Payment History:** A table showing a list of transactions for 'Fred Flintstone (Account # 1980)'. The table has columns for Transaction Date, Amount, Payment Type, Check Number, Refunds/Reversals, and Unapplied Amount. The row for '07/21/22' is highlighted in blue and circled in red.
- Buttons:** 'Print Receipt', 'Refund Credits', 'Reverse Payment', 'Edit' (circled in red), and 'Close'.

Transaction Date	Amount	Payment Type	Check Number	Refunds/Reversals	Unapplied Amount
09/08/23	60.00	Master Card Payment			0.00
10/11/22	10.00	Visa Card Payment			0.00
09/06/22	75.00	Ins Pmt - Cigna PPO	5555555		0.00
	20.00	Ins Adj - Cigna PPO			0.00
08/25/22	20.00	Visa Card Payment			0.00
08/01/22	34.74	Ins Pmt - Cigna PPO	13131313		0.00
	10.26	Ins Adj - Cigna PPO			0.00
07/21/22	106.29	Ins Pmt - Aetna HMO	414141414		0.00
	53.71	Ins Adj - Aetna HMO			0.00
02/09/22	0.00	Ins Pmt - Aetna HMO	090909090		0.00
	56.00	Ins Adj - Aetna HMO			0.00
01/22/22	100.34	Ins Pmt - Aetna HMO	36363636		0.00
	99.66	Ins Adj - Aetna HMO			0.00
12/28/21	10.00	TOS Check Payment	256		0.00

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Feature Rich: Billing in PCC EHR

Post Insurance Payments in the EHR

Insurance Payments

Posting: History (Wilma Flintstone)

Claim ID: [Blank]

Patient Flags: [Blank]

Account Flags: [Blank]

Insurance Payment - Edit:

Transaction Date: 07/21/22
Check Number: 414141414

Distribution:

Date of Service	CPT	Charge Amount	Expected Copay	Pending Insurance
06/29/22	99392	135.00	10.00	125.00
Totals:				
06/29/22	99173	10.00	0.00	10.00
06/29/22	92551	10.00	0.00	10.00
06/29/22	90658	15.00	0.00	15.00
Totals:				
		170.00	10.00	160.00

Insurance Payments

Posting: History (Jeffrey Addington)

Abigail Addington 9 yrs, 11 mos 09/19/13 F B F

Account Balances

Jeffrey Addington (Account # 1238)

Aging	0-29 days	30-59 days	60-89 days	90-119 days	120+ days	Credit	Total Balance
Personal	0.00	0.00	0.00	0.00	207.00	0.00	207.00
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

Payment History

Jeffrey Addington (Account # 1238)

Search Filter: [Blank]

Transaction Date	Amount	Payment Type	Check Number	Refunds/Reversals	Unapplied Amount
07/12/23	81.59	Ins Pmt - Capital Blue Cross	100538215		0.00
	3.41	Ins Adj - Capital Blue Cross			0.00
81.59 Ins Pmt - Capital Blue Cross Applied to:					
04/25/23	81.59	Abigail Addington 99393	Well Child 5-11 yrs	Elizabeth Mary Casey, MD	
3.41 Ins Adj - Capital Blue Cross Applied to:					
04/25/23	3.41	Abigail Addington 99393	Well Child 5-11 yrs	Elizabeth Mary Casey, MD	
05/14/23	0.00	Ins Pmt - Capital Blue Cross			0.00
04/24/23	10.00	TOS Cash Payment			0.00
04/18/23	26.16	Ins Pmt - Capital Blue Cross	100474255		0.00
	18.84	Ins Adj - Capital Blue Cross			0.00

Buttons: Print Receipt | Refund Credits | **Reverse Payment** | Edit | Close

UC 2024

Feature Rich: Billing in PCC EHR

Post Insurance Payments in the EHR

Payment History - Reverse Payment

Reversal: Insurance Takeback (81.59)

Payment: **Transaction Date** **Payment Type** **Amount**
 ▼ 07/12/23 Ins Pmt - Capital Blue Cross 100538215 81.59

Applied to

04/25/23 Abigail Addington 99393 Well Child 5-11 yrs Elizabeth Mary Casey, MD 81.59

▼ 07/12/23 Ins Adj - Capital Blue Cross 100538215 3.41

Applied to

04/25/23 Abigail Addington 99393 Well Child 5-11 yrs Elizabeth Mary Casey, MD 3.41

Insurance Payments - Finder

Abigail Addington 9 yrs, 11 mos 09/19/13 F B F

90-119 days	120+ days	Credit	Total Balance
0.00	207.00	0.00	207.00
0.00	0.00	0.00	0.00
0.00	0.00	0.00	0.00

Search Filter:

Check Number	Refunds/Reversals	Unapplied Amount
100538215		0.00
		0.00

Patient

Abigail

First Name: 06/29/22 90658 15.00 0.00 15.00
 Nickname:
 Middle:
 Last Name:
 Suffix:
 Date of Birth:

Totals: 170.00 10.00 160.00

Payment History

Jeffrey Addington (Account # 1238)

Transaction Date	Amount	Payment Type	Check Number	Refunds/Reversals	Unapplied Amount
07/12/23	81.59	Ins Pmt - Capital Blue Cross	100538215	09/11/23 Insurance Takeback	0.00
05/14/23	0.00	Ins Pmt - Capital Blue Cross			0.00
04/24/23	10.00	TOS Cash Payment			0.00
04/18/23	26.16	Ins Pmt - Capital Blue Cross	100474255		0.00
	18.84	Ins Adj - Capital Blue Cross			0.00
04/18/23	26.16	Ins Pmt - Capital Blue Cross	100474255		0.00

UC 2024

Feature Rich: Billing in PCC EHR

Work with ERA's in the EHR

UC
2024

Feature Rich: Billing in PCC EHR

Work with ERA's in the EHR

The screenshot shows the PCC EHR main menu with the 'Tools' dropdown menu open. The 'Electronic Remittance Advice' option is highlighted. Other menu items include Claims, Immunization Registry Response Viewer, Insurance Eligibility, Insurance Payments, Patient Portal Administration, Payments, and Print Visit Forms.

Electronic Remittance Advice

The source of the information displayed is the payor. Search:

Remittance	Processed	Payor	Check#	Amount
11/29/23		UnitedHealth, Inc	0000000000	0.00
11/29/23		UnitedHealth, Inc	0000000000	123.65
11/29/23		Delta	0000000000	70.00
11/29/23		UnitedHealth Plans LLC	00000000	336.78
11/29/23		UnitedHealth Plans LLC	00000000	284.37
11/29/23		UnitedHealth Insurance Inc	00000000	7263.17
11/29/23		UnitedHealthcare Insurance Company	00000000	210.50
11/28/23		Delta	0000000000	229.73
11/28/23		UnitedHealthcare	0000000000	332.29
11/28/23		UnitedHealthcare	0000000000	1308.77
11/28/23		Delta	0000000000	121.87
11/28/23		UnitedHealthcare of New Jersey Inc	0000000000	319.05

Status: Unprocessed ▾

Page Up Page Down Page 1 / 1 View Close

The screenshot shows a status filter dropdown menu with the following options: Unprocessed, All Statuses, Deleted, Processed, and Unprocessed. The 'Processed' option is highlighted.

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Feature Rich: Billing in PCC EHR

Work with ERA's in the EHR

The screenshot displays the PCC EHR interface with several overlapping windows. At the top, a menu bar includes 'PCC EHR', 'File', 'Edit', 'Reports', 'Tools', 'Configuration', 'Window', and 'Help'. The main window, titled 'Electronic Remittance Advice', shows a search bar with 'C00' entered and a table of remittance data. A secondary window, 'Electronic Remittance Advice - View', provides a detailed look at a specific ERA, including a status of 'Processed 11/22/23 by Able Biller' and an 'Autopost Processing Summary' table. A third window shows a status filter dropdown menu with 'Processed' selected. A 'UC 2024' logo is in the bottom left, and the PCC logo is in the bottom right.

Electronic Remittance Advice

The source of the information displayed is the payor.

Search: C00

Remittance	Processed	Payor	Check#	Amount
11/29/23			C00	0.00
11/16/23			C00	0.00

Electronic Remittance Advice - View

Find:

Status: Processed 11/22/23 by Able Biller

ERA

Remittance: 11/22/23
Payor: [Redacted]
Check #: [Redacted]
Amount: 1,264.56

Autopost Processing Summary:

Payment:	731.93	3 claims
Adjustment:	673.07	
Exceptions:	532.63	2 claims
Check Amount:	1,264.56	5 claims

Payor Processing Status:

Primary:	5
Total:	5

Payor
Insurance: [Redacted]
Address: [Redacted]

Display: All Payments

Print Back

UC
2024

Feature Rich: Billing in PCC EHR

Work with ERA's in the EHR

PCC EHR File Edit Reports Tools Configuration Window Help

Electronic Remittance Advice

Autopost Processing Summary:

Payment:	21,519.80	141 claims
Adjustment:	22,742.94	
Exceptions:	-301.23	4 claims
Check Amount:	21,218.57	145 claims

Exceptions

Did not find a payment to reverse	(6)
Did not find an adjustment to reverse	(6)
Total of payments and adjustments was greater than the pending amount	(3)
Total:	(15)

Payor Processing Status:

Primary:	142
Primary, Forwarded:	1
Reversal:	2
Total:	145

When items on an ERA could not be autoposted, a summary of the exception reasons appears in this section

11/28/23

Status: Unprocessed

Page 1 / 1

11/28/23

Status: Unproce

Page Up Pa

Autopost Processing Summary:

Payment:	731.93	3 claims
Adjustment:	673.07	
Exceptions:	532.63	2 claims
Check Amount:	1,264.56	5 claims

Payor Processing Status:

Primary:	5
Total:	5

Payor

Insurance: [Redacted]

Address: [Redacted]

Display: All Payments

Print Back

Feature Rich: Billing in PCC EHR

Work with ERA's in the EHR

PCC EHR File Edit Reports **Tools** Configuration

Electronic Remittance Advice

Autopost Processing Summary

Payment: 21,51

Adjustment: 22,74

Exceptions: -30

Check Amount: 21,21

Payor Processing Status:

Primary: 142

Primary, Forwarded: 1

Reversal: 2

Total: 145

ABELENE, AUDREY PCC ID: 0101010 10101010
 Payor Claim Control Number: 010101010101010 Ins ID: 010101010101010 Processed as Primary

Date	Procedure Code	Charge	Deductible	Copay/Coinsurance	Personal Other	Total Personal Due	Contractual Adjustment	Other Adjustment	Payment
10/26/23	99381	250.00	0.00	0.00	0.00	0.00	101.14 45 CO	0.00 N381	148.86
TOTALS:		250.00	0.00	0.00	0.00	0.00	101.14	0.00	148.86

BABELENE, BAKER PCC ID: 0101010 10101010
 Payor Claim Control Number: 010101010101010 Ins ID: 010101010101010 Processed as Primary

Date	Procedure Code	Charge	Deductible	Copay/Coinsurance	Personal Other	Total Personal Due	Contractual Adjustment	Other Adjustment	Payment
11/14/23	99213	190.00	0.00	20.00 3 PR	0.00	20.00	89.46 45 CO	0.00 N381	80.54
11/14/23	87634-QW	155.00	0.00	0.00	0.00	0.00	1.94 45 CO	0.00 N381	153.06
TOTALS:		345.00	0.00	20.00	0.00	20.00	91.40	0.00	233.60

Posting Exception: Copay listed did not match charge history (CPT 99213)

▶ Key

CARVER, CALLIE PCC ID: 0101010 10101010
 Payor Claim Control Number: 010101010101010 Ins ID: 010101010101010 Processed as Primary

Date	Procedure Code	Charge	Deductible	Copay/Coinsurance	Personal Other	Total Personal Due	Contractual Adjustment	Other Adjustment	Payment
11/13/23	99214-25	270.00	0.00	25.00 3 PR	0.00	25.00	124.71 45 CO	0.00 N381	120.29

11/28/23

Status: Unprocessed

Page: Page:

- All Statuses
- Deleted
- Processed**
- Unprocessed

Address:

Display: All Payments

Print Back



Feature Rich: Billing in PCC EHR

Work with ERA's in the EHR

PCC EHR File Edit Reports Tools Configuration

Electronic Remittance Advice

Autopost Processing Summary

Payment: 21,51

Adjustment: 22,74

Exceptions: -30

Check Amount: 21,21

Payor Processing Status:

Primary: 142

Primary, Forwarded: 1

Reversal: 2

Total: 145

ABELENE, AUDREY PCC ID: 0101010 10101010
 Payor Claim Control Number: 010101010101010 Ins ID: 010101010101010 Processed as Primary

Date	Procedure Code	Charge	Deductible	Copay/Coinsurance	Personal Other	Total Personal Due	Contractual Adjustment	Other Adjustment	Payment
10/26/23	99381	250.00	0.00	0.00	0.00	0.00	101.14 45 CO	0.00 N381	148.86

▼ Key

Type	ID	Description
CARC Code	246	This non-payable code is for required reporting only.
CARC Code	3	Co-payment Amount
CARC Code	45	Charge exceeds fee schedule/maximum allowable or contracted/legislated fee arrangement. Usage: This adjustment amount cannot equal the total service or claim charge amount; and must not duplicate provider adjustment amounts (payments and contractual reductions) that have resulted from prior payer(s) adjudication.
CARC Group	CO	Contractual Obligation
CARC Group	PR	Personal Responsibility
RARC Code	N381	Alert: Consult our contractual agreement for restrictions/billing/payment information related to these charges.
RARC Code	N572	This procedure is not payable unless appropriate non-payable reporting codes and associated modifiers are submitted.

TOTALS:	345.00	0.00	20.00	0.00	20.00	91.40	0.00	N381	233.60
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Posting Exception: Copay listed did not match charge history (CPT 99213)

► Key

CARVER, CALLIE PCC ID: 0101010 10101010
 Payor Claim Control Number: 010101010101010 Ins ID: 010101010101010 Processed as Primary

Date	Procedure Code	Charge	Deductible	Copay/Coinsurance	Personal Other	Total Personal Due	Contractual Adjustment	Other Adjustment	Payment
11/13/23	99214-25	270.00	0.00	25.00 3 PR	0.00	25.00	124.71 45 CO	0.00 N381	120.29

11/28/23

Status: Unprocessed

Page: All Statuses Deleted Processed Unprocessed

Address: [Redacted]

Display: All Payments

Print Back



Feature Rich: Billing in PCC EHR

Work with ERA's in the EHR

PCC EHR File Edit Reports **Tools** Configur...

Electronic Remittance Advice

Find:

Status: Processed 11/22/23 by Able Biller

ERA
 Remittance: 11/22/23
 Payor: [REDACTED]
 Check #: [REDACTED]
 Amount: 1,264.56

Autopost Processing Summary:
 Payment: 731.93 3 claims
 Adjustment: 673.07
 Exceptions: 532.63 2 claims
 Check Amount: 1,264.56 5 claims

Payor Processing Status:
 Primary: 5
 Total: 5

Remittance: 11/22/23
 Check #: 601900902603
 Amount: 1,264.56

Display: **All Payments**
 All Payments
 Auto-posted Payments
 Payment Exceptions

Print Back

PCC ID: 0101010 10101010
 0101010 Ins ID: 010101010101010

Processed as Primary

Contractual Adjustment	Other Adjustment	Payment
101.14 45 CO	0.00 N381	148.86
101.14	0.00	148.86

...e arrangement. Usage: This adjustment amount provider adjustment amounts (payments and

...mation related to these charges. and associated modifiers are submitted.

91.40	0.00	233.60
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Processed as Primary

Contractible	Copy/Coinsurance	Personal Other	Total Personal Due	Contractual Adjustment	Other Adjustment	Payment
11/13/23	99214-25	270.00	0.00	25.00 3 PR	0.00	25.00
				124.71 45 CO	0.00 N381	120.29

11/28/23

Status: Unprocessed

Page: All Statuses Deleted Processed Unprocessed

UC 2024

Feature Rich: Billing in PCC EHR

Autopost in the EHR

UC
2024

Feature Rich: Billing in PCC EHR

Autopost in the EHR

Electronic Remittance Advice

The source of the information displayed is the payor. Search:

Remittance	Processed	Payor	Check#	Amount
04/05/24				1343.05
04/05/24				192.30
04/04/24				255.47
04/04/24				175.02
04/04/24				0.00
04/04/24				171.76
04/04/24				100.33
04/04/24				109.50
04/04/24				121.87
04/04/24				0.00
04/04/24		Oxford	303030430303043030304	78.54
04/04/24				207.63
04/04/24		Oxford	3030305	83.18

Status: Unprocessed

Page Up Page Down Page 1 / 1

Process View Close

Confirmation - Process Electronic Remittance Advice

This ERA will be processed.

Remittance: 04/05/24
Payor: Cigna
Check #: 202020
Amount: 1343.50

Cancel Process

Feature Rich: Billing in PCC EHR

Autopost in the EHR

Electronic Remittance Advice - View

Find:

Status: Processed 04/24/24 by PCC PCC

ERA	Remittance: 04/05/24
	Payor: Cigna
	Check #: 202020
	Amount: 1343.05

Autopost Processing Summary:		Exceptions	
Payment:	1343.05	3 claims	
Adjustment:	860.95		
Exceptions:	0.00	0 claims	
Check Amount:	1343.05	3 claims	
Payor Processing Status:		Total: (0)	
Primary:	3		
Total:	3		

The Autopost Processing Summary shows totals of what was autoposted and lists any exceptions that could not be posted

Amount
1343.05
192.30
255.47
175.02
0.00
171.76
100.33
109.50
121.87
0.00
78.54
207.63

Payor	Insurance: Cigna	Autopost Processing Summary:	Payment: 21,519.80	141 claims	Exceptions	Did not find a payment to reverse	(6)
	Address: PO BOX 182223		Adjustment: 22,742.94			Did not find an adjustment to reverse	(6)
	CHATTANOOGA TN 37422-7223		Exceptions: -301.23	4 claims		Total of payments and adjustments was greater than the pending amount	(3)
			Check Amount: 21,218.57	145 claims		Total:	(15)
		Payor Processing Status:	Primary: 142				
			Primary, Forwarded: 1				
			Reversal: 2				
			Total: 145				

When items on an ERA could not be autoposted, a summary of the exception reasons appears in this section

Display:

Payor Processing Status:

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2024

Session Takeaways

1. Change in routine is hard.
2. Value only matters if you can feel its impact.
3. Every enhancement is meant to have both value to you as well as those patients you serve.

References

Updates - PCC Learn

What Questions Do You Have?

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