

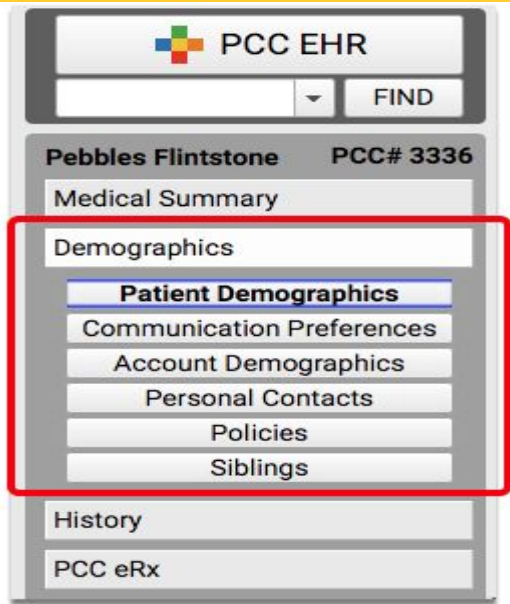
Are You Billing Like It's 2025?

Douglas Brosseau

Implementation Specialist

Links to documentation
in white boxes

Demographics and Policies



The image shows a screenshot of the PCC EHR interface. At the top, there is a header with the PCC EHR logo and a search bar with a 'FIND' button. Below the header, the patient's name 'Pebbles Flintstone' and PCC# '3336' are displayed. A 'Medical Summary' button is visible. A red rectangle highlights a vertical menu on the left side of the screen. This menu contains the following options: 'Demographics', 'Patient Demographics' (which is highlighted with a blue bar), 'Communication Preferences', 'Account Demographics', 'Personal Contacts', 'Policies', and 'Siblings'. Below this menu, there are buttons for 'History' and 'PCC eRx'.

Policies

Display: Active

Insurance	Copay	Certificate	Group	Start	
▶ 1. Aetna HDHP	\$15.00	34DFJH	44433322211	11/01/14	
▶ M 2. Medicaid	\$0.00	111223333		01/01/18	ACTIVE

☐ All Statuses
☒ Active
☐ Expired

[Demographics Documentation](#)
[Policies Documentation](#)

Eligibility Tool

Insurance Eligibility - Review and Verify

Pebbles Flintstone10 yrs, 1 mo9/10/08F

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: Validated09/30/18[PCC PCC]

Eligibility Response: 09/30/18 Active

▼ 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

Request Eligibility


Policies

Edit PolicyAdd PolicyDisplay: Active

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

[Eligibility Documentation](#)

Account Notes

 PCC EHR

FIND

Abbey Addington PCC# 158257

Medical Summary

Demographics

Patient Demographics

Communication Preferences

Account Demographics

Account Notes

Personal Contacts

Policies

Siblings

Patient Portal Users

Account Balances

Appointment History

History

Visit: 10/27/22

Sick Visit 2.0

Abbey Addington 15 yrs, 9 mos 01/01/07 M

Demographics

Account Demographics

Home and Billing Account

Arny Addington (Account # 93441)

Address

111 Noplace Lane
Winooski, VT 05404

Phone

Home Phone: 800-722-1082
Parent 1 Work:
Parent 2 Work: 800-722-1082
Parent 1 Cell: 800-722-1082

Email:

Account Information

Account Flags:
PC Notes:
Family Notes:
Parent 2 SSN:
Parent 1 SSN:
CC Name:
CC4/EXP:

Recent Financial History

Last Service: 08/02/22
Last Bill Sent: 05/18/22
Last Pers. Pmt: 06/06/22
Last Ins. Pmt: 08/09/22
Hold Bill Until:
Budget Amt:

Account Notes

Arny Addington (Account # 93441)

New Note

▼ 2022 (1 Thread)

▶ 10/27/22 MPB Michael S. Markoff, M.D. (1 comment)


An important note about a billing issue with this family. An important note about a billing issue with this family. An important note about a billing issue with this family. An important note about a billing issue with this family. An important note about a billing issue with this family.

▶ 2019 (1 Thread)

Personal Contacts

[Account Notes](#)
[Documentation](#)

Encounter Billing Notes

 PCC EHR

FIND

Abigail Addington

PCC# 2503

Medical Summary

Demographics

History

Visit History

Immunization History

Flowsheets

Growth Charts

Documents

Billing History

PCC eRx

Visit: 12/03/24

Sick - Bright Futures

Billing History

Abigail Addington 9 yrs, 11 mos 12/15/14 F

12/03/24 Beverly Crusher, MD, Burlington Peds - New North End

Billing Provider: Beverly Crusher, MD

Payments from 12/03/24:
none

Claim History:
There are no claim events

Encounter Billing Notes:
12/03/24 Mark Williams, M.D. (1 comment)
Discussed outstanding charges and collected today's copay. The Addingtons have not paid their outstanding balance and their insurance is currently expired. Dr. Crusher spoke with mom and okayed today's visit.
12/03/24 Mark Williams, M.D.
Got updated insco information and scanned new card.

Billing History Index

Find Filter: Find

Date	Provider of Service	Place of Service	Billing Status	Signed	Billing Account	Docs
12/03/24	Beverly Crusher, MD	Burlington Peds - New North End	Posted	Williams	Jeffrey Addington (# 1238)	
07/20/24	Elizabeth Mary Casey, MD	Winooski Pediatrics	Not Ready		Jeffrey Addington (# 1238)	
06/22/24	Office	Winooski Pediatrics	Not Ready		Jeffrey Addington (# 1238)	
05/25/24	Mark Williams, M.D.	Winooski Pediatrics	Not Ready		Jeffrey Addington (# 1238)	
05/06/24	Mark Williams, M.D.	Winooski Pediatrics	Not Ready		Jeffrey Addington (# 1238)	
04/27/24	Elizabeth Mary Casey, MD	Winooski Pediatrics	Not Ready		Jeffrey Addington (# 1238)	

Print

Payments

Create Encounter

Edit Charges

Post Charges

View Documents

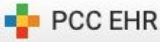
Close

Save

Save + Exit

[Encounter](#)
[Billing Notes](#)
[Documentation](#)

Post Charges



Abigail Addington **PCC# 2503**
History
Post Charges: 01/14/20
Patient Details
Post Charges
Appointment Details
Diagnoses
Procedures
Claim Information
Payments
Receipts

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

Diagnoses

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

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	

[Post Charges](#)
[Documentation](#)


Post Administrative Fees or Hospital Visits

Billing History Index Search Filter: ◀ ▶

Date	Provider	Place of Service	Billing Status	Signed	Billing Account	Docs
------	----------	------------------	----------------	--------	-----------------	------

[Post Administrative Fees
Documentation](#)

Bill Portal Messages and Phone Notes



PCC EHR

▼

FIND

Schedule (14)

Visit Tasks (4)

E-lab Results (3)

Rx Queue (0)

Messaging (8)

Signing (6)

Tasks: 8

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


[Bill Portal](#)
[Messages and](#)
[Phone Notes](#)
[Documentation](#)

Find Unposted Encounters

Reports	
Scheduled Reports	
Saved Results	
Reports	
▸ All Reports	
▸ Appointment	
▾ Billing	
Search Filter: <input type="text"/>	
Name ▲	Description
Allowable Overpayments by Insurance Group 🟡	Review insurance payments which were above contracted amounts to identify potential takebacks or schedules which need to be updated.
Allowable Underpayments by Insurance Group 🟡	Review insurance payments that were below contracted amounts to identify payer errors.
Billed Diagnoses by Date 🟡	Find all billed diagnoses within a date range.
Encounters by Billing Status 🟡	Identify visits, phone notes, and portal messages which are waiting to be billed.
Immunization Administration Count 🟡	Display the number of vaccines administered during a date range, grouped by lot number.

[Find Unposted Encounters Documentation](#)

Review an Encounters' Billing History

 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

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

Billing Status:
Ready To Post

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

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

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

Primary Insurance Policy:
BPP #123456789

Billing History Index Search Filter: Search

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

Create Encounter Post Charges View Documents Close Save Save + Exit

[Review
Encounter
Billing History
Documentation](#)

Reconcile Payments

Reports

Scheduled Reports

Saved Results

Reports

› All Reports

› Appointment

▼ Billing

Search Filter:

Name	Description
	type, lot location, and funding source.
Orders by Visit	List of appointments that include selected order types.
Patient Visits By Protocol	Find patient visits based on the protocol of the visit.
Payment Details by Check Number	View details about each posted payment for a given check number to identify missing improperly entered insurance payments.
Payment Reconciliation	Reconcile payments entered into PCC against money collected.
Payment Totals by Check Number	Compare posted insurance check payments against ERA/EOB amounts to ensure that payments were entered.
Post Payments	Post payments by date range.

[Reconcile Payments Documentation](#)

Submit Claims

Submission

Needs Correction (0)

Log

Holds

Delay

Claims - Submission - Claims Prepared

Selected Batches:

Edit

All batches

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

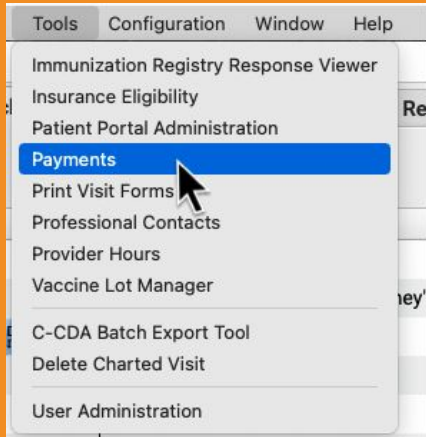
Claims That Will Not Be Submitted:
8 Claims held
3 Claims delayed
6 Claims need corrections

Close

Submit Claims

[Submit Claims](#)
[Documentation](#)

Post Personal Payments / Adjustments



Payments Fred Flintstone Account #1980 1400 Rock Road

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	

[Post Personal Payments / Adjustments Documentation](#)

Review Payment History and Edit Payments

Payments Fred Flintstone Account #1980 1400 Rock Road

Posting History

Account Balances
Fred Flintstone (Account # 1980)

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

► Encounters with Outstanding Personal Balances

Payment History Search Filter:

Transaction Date	Amount	Payment Type	Check Number	Unapplied Amount
► 05/12/22	60.00	Master Card Payment		60.00
► 06/14/21	10.00	Visa Card Payment		0.00
► 05/10/21	68.00	Ins Pmt - Cigna PPO		0.00
► 05/10/21	0.00	Ins Pmt - Cigna PPO		0.00
► 05/10/21	0.00	Ins Pmt - Cigna PPO		0.00
► 04/28/21	20.00	Visa Card Payment		0.00

Print Receipt Edit Close

[Review Payment History / Edit Payments](#)
[Documentation](#)

Autopost Insurance Payments

Electronic Remittance Advice				
The source of the information displayed is the payor.			Search:	<input type="text"/>
Remittance	Processed	Payor	Check#	Amount
04/05/24		Cigna	202020	1343.05
04/05/24		United	1111111	192.30
04/04/24		United	1111112	255.47
04/04/24		United	1111114	175.02
04/04/24		United	1111116	0.00
04/04/24		United	1111118	171.76
04/04/24		United	1111120	100.33
04/04/24		United	1111121	109.50
04/04/24		United	1111122	121.87
04/04/24		United	1111124	0.00
04/04/24		Oxford	3030303	78.54
04/04/24		Oxford	3030304	207.63
04/04/24		Oxford	3030305	83.18

Status: Unprocessed ▾

Page Up Page Down Page 1 / 1

Process View Close

[Autopost Insurance Payments Documentation](#)

Manually Post Insurance Payments

Insurance Payments

Abigail Addington 9 yrs, 11 mos 05/16/13 F

Claim ID: 5555555

Patient Flags: Lake Champlain Pediatrics

Account Flags:

Insurance Payment:

Transaction Date 05/08/23

Check Number

Payment Type Ins Pmt

Adjustment Type Ins Adj

Current Policy Capital Blue Cross \$10 OV&WC-Other

Next Policy Personal

Distribution:

Date of Service	CPT	Charge Amount	Expected Copay	Pending Insurance	Payment	Adjustment	Personal Balance	CARC: Code	Covered Amount
12/20/22	99393	100.00	10.00	90.00	payment	adjustment	balance	3	
12/20/22	90658	20.00	0.00	20.00	payment	adjustment	balance		
Totals:		120.00	10.00	110.00					

Cancel Save Save + Post

[Manually Post Insurance Payments Documentation](#)

Edit Insurance Payments

Insurance Payments

Abigail Addington9 yrs, 11 mos09/19/13F

PostingHistory (Jeffrey Addington)

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

Search Filter:

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		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

Print Receipt

Refund Credits

Reverse Payment

Edit

Close

[Edit Insurance Payments Documentation](#)

Edit Charges

History

Visit History

Immunization History

Flowsheets

Growth Charts

Documents

Billing History

PCC eRx

Create Visit

Account:
Jeffrey Addington (Account #1238)
730 Grandview Drive
Saint Albans Bay, VT 05481

Primary Insurance Policy:
Aetna PPO \$10
Certificate: 11111111
Group: 1111

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

Diagnoses:
J02.0 Streptococcal pharyngitis

Procedures:

CPT	Units	Description	Amount	Diagnoses
99213	1	OV Expanded Focus	100.00	J02.0
		01/23/25 Ins Pmt - Aetna	(0.00)	

Billing History Index

Find Filter: **Find** ◀ ▶

Date	Provider of Service	Place of Service	Billing Status	Signed	Billing Account	Docs
01/17/25	Mark Williams, M.D.	Winooski Pediatrics	Posted	Abbott, Casey	Jeffrey Addington (# 1238)	
01/07/25	Mark Williams, M.D.	Burlington Peds - New North End	Posted	Williams	Jeffrey Addington (# 1238)	
07/26/24	Elizabeth Mary Casey, MD	Winooski Pediatrics	Posted	Williams	Jeffrey Addington (# 1238)	
06/28/24	Office	Winooski Pediatrics	Posted	Williams	Jeffrey Addington (# 1238)	

Create Visit

Print

Payments

Create Encounter

Edit Charges

Post Charges

View Documents

Close

Save

Save + Exit

[Edit Charges Documentation](#)

Generate Personal Statements

Electronic Bills

Paper Bills

Log

E-billing Messages

Paper Billing Messages

Electronic Bills

Bills Last Submitted: 07/17/24

Select electronic bills to be prepared:

Select All

☐ Current

☐ Overdue 30 days

☐ Overdue 60 days

☐ Overdue 90 days

☐ Overdue 120 days

Close

Prepare E-bills

[Documentation Link](#)

Productivity Reporting

Reports

Scheduled Reports

Saved Results

Reports

▸ Clinical

▸ Communication

▸ Data Source

▾ Financial Oversight

Search Filter:

Name	Description
Allowable Overpayments by Insurance Group	Review insurance payments which were above contracted amounts to identify potential takebacks or schedules which need to be updated.
Allowable Underpayments by Insurance Group	Review insurance payments that were below contracted amounts to identify payer errors.
Payment Details by Check Number	View details about each posted payment for a given check number to identify missing or improperly entered insurance payments.
Payment Totals by Check Number	Compare posted insurance check payments against ERA/EOB amounts to ensure that all payments were entered.
Payments and Adjustments by Payment Type	Review payments and adjustments, grouped by payment type, to identify outliers and discrepancies.
Total Charges and Payments by Provider and Month	Aggregate charges and payments by provider for provider productivity assessments.

[Productivity Reporting Documentation](#)

Accounting Tasks

Payment History					Search Filter:
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			10.00
▶ 05/22/22	11.16	Ins Pmt - Capital Blue Cross	100474255		0.00
▶ 05/22/22	3.84	Ins Adj - Capital Blue Cross	100474255		0.00
▶ 05/22/22	10.00	Ins Pmt - Capital Blue Cross	100474255		0.00
▶ 05/22/22	10.00	Ins Adj - Capital Blue Cross	100474255		0.00

Print ReceiptRefund CreditsReverse PaymentEditClose

[Refund Credits](#)

[Returned Checks](#)

[Insurance](#)
[Takebacks](#)

Billing Configuration

Billing Configuration

Order Mapping

Diagnosis Mapping

Default Procedures

ICD-10 Default Diagnoses

Order Mapping

Search Filter:

Order Type	Order Name	ICD-10 Billing Diagnosis	CPT Billing Procedure
Followup	12 month well visit		
Followup	15 month well visit		
Followup	18 month well visit		
Followup	2 1/2 year well visit		
Followup	2 month well visit		
Followup	2 week well visit		
Followup	2 year well visit		
Followup	3 year well visit		
Followup	4 month well visit		
Followup	4 year well visit		
Followup	5 year well visit		
Followup	6 month well visit		
Followup	9 month well visit		
Followup	Acetaminophen (Tyle...		
Followup	Acetaminophen (Tyle...		

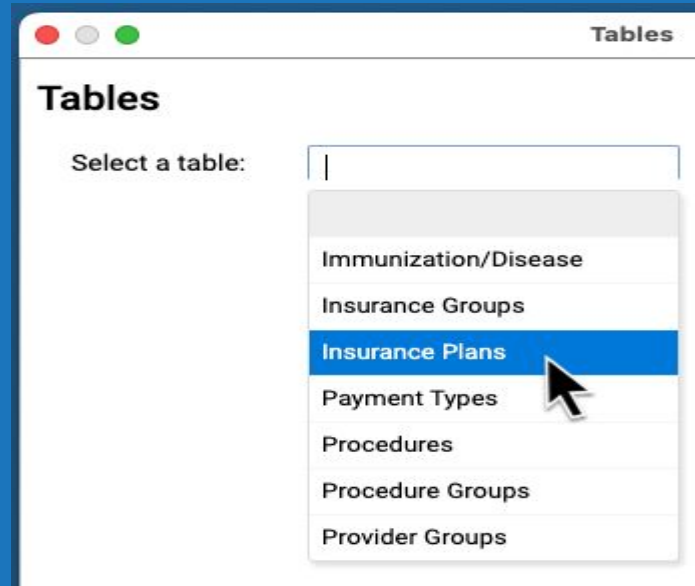
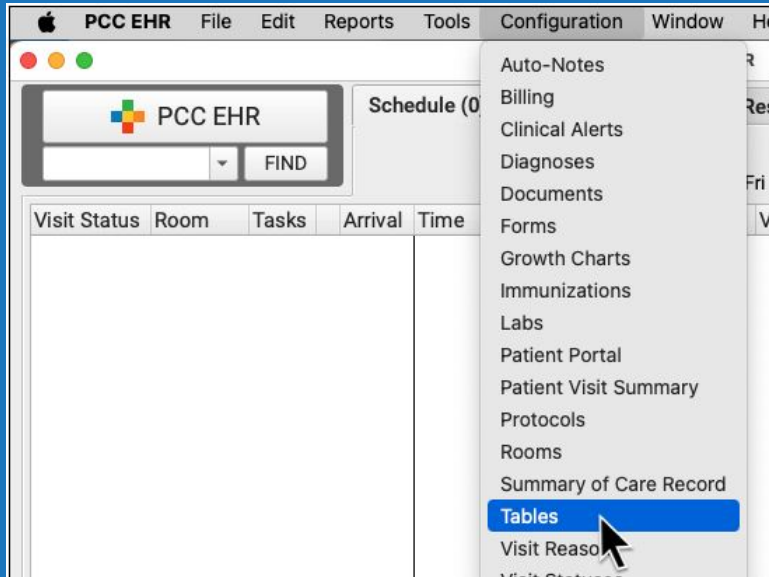
[x] = Preselected on Billing Screen
[] = Not Preselected on Billing Screen

Edit

Close

[Billing Configuration Documentation](#)

Edit Tables



[Edit Tables Documentation](#)

Please fill out the course survey in the app

What Questions Do You Have?