

# What's New with Billing in PCC EHR?


Brian Kennedy  
Doug Brosseau

# Session Goals

See what billings tools are available in PCC EHR!

# Features Added in 10.1

# Instantly Review a Patient's Active Policies

 PCC EHR

**Abigail Addington\*** PCC# 2503

Medical Summary

Demographics

History

### Phone Note

#### Encounter Details

Date of Service: 07/17/24

Provider of Service:

Encounter Location:

#### Recent and Upcoming Appointments (Chart-wide)

Last Visit: 03/02/24 (4m 2w ago) Dr. Casey

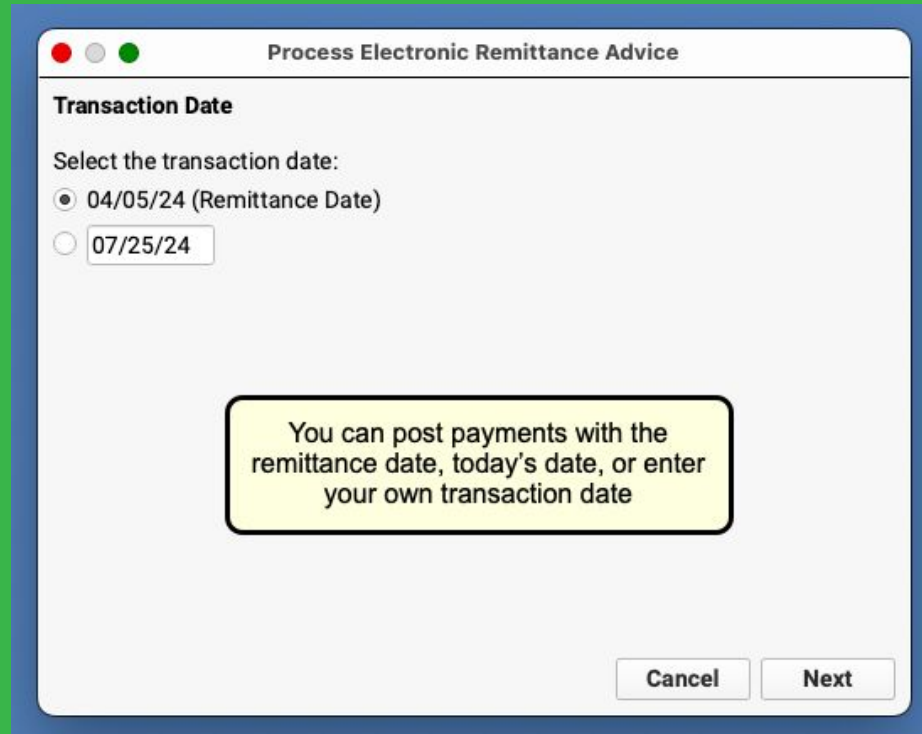
**Abigail Addington** 9 yrs, 11 mos 07/28/14 F

Weight: 77 lbs (34.927 kg) 63<sup>rd</sup> percentile<sub>(CDC)</sub>  
Taken 07/17/24 (9y 11m)

PCP: Beverly Crusher, MD

**Policies:**  
1. Capital Blue Cross \$10 OV&WC-Other  
2. Medicaid

# Enter a Custom Transaction Date When Autoposting ERAs



The screenshot shows a software window titled "Process Electronic Remittance Advice". Inside, under the heading "Transaction Date", there is a prompt "Select the transaction date:". Below this, there are two radio button options. The first option is "04/05/24 (Remittance Date)" and is selected. The second option is "07/25/24", which is in a text input field. At the bottom of the window are "Cancel" and "Next" buttons. A yellow callout box with a black border contains the text: "You can post payments with the remittance date, today's date, or enter your own transaction date".

**Process Electronic Remittance Advice**

**Transaction Date**

Select the transaction date:

☒ 04/05/24 (Remittance Date)

☐ 07/25/24

You can post payments with the remittance date, today's date, or enter your own transaction date

Cancel Next

# Automatically Change Expected Copay to \$0 When a Patient Has Medicaid Secondary

When you autopost ERAs from a private insurance payor in PCC EHR, and a patient also had an active Medicaid policy for the date of service, the expected copay will be reduced to \$0.

Autoposting in PCC EHR will override the expected copay in PCC for the primary plan when a patient has Medicaid as secondary, allowing the balance to generate a secondary claim to Medicaid.

# Review a Posted ERA for Special Cases

**Electronic Remittance Advice - View**

Find:

**Status: Processed 07/23/24 by PCC PCC**

**ERA**  
Remittance: 04/04/24  
Payor UNITED HEALTHCARE INSURANCE COMPANY  
Check #: 202020  
Amount: 21,218.07

**Autopost Processing Summary:**

Payment:	16,450.04	35 claims
Adjustment:	17,948.16	
General Adjustments:	308.09	
Exceptions:	4,460.44	110 claims
Check Amount:	21,218.07	145 claims

**Payor Processing Status:**

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

**Posting Exceptions:**

Did not find a payment to reverse	6
Did not find an adjustment to reverse	6
Procedure code not found in the charge history for this claim	138
Total of payments and adjustments was greater than the pending amount	4
Total:	154

**Special Cases:**

Charges 100% adjusted	18
Claims queued to subsequent insurance	1
Copay amounts changed	9
General Adjustments	1
Payments less than the allowable	15
Payments more than the allowable	70
Submitted if different (CPT Code)	5

Processed ERAs display a total of Posting Exceptions (items not posted) and Special Cases (other circumstances you may wish to review)

Display:  Posting Exceptions:

Payor Processing Status:  Special Cases:

Adjustment Reasons Selector Print Back

# Review a Posted ERA for Special Cases - Cont.

Payor Processing Status:		Special Cases:	
Primary:	142	Charges 100% adjusted	18
Primary, Forwarded:	1	Claims queued to subsequent insurance	1
Reversal:	2	Copay amounts changed	9
Total:	145	General Adjustments	1
		Payments less than the allowable	15
		Payments more than the allowable	70
		Submitted if different (CPT Code)	5

Payor	
Insurance:	UNITED HEALTHCARE INSURANCE COMPANY
Address:	6000 BREN ROAD

Display:	All Payments	Posting Exceptions:	All Posting Exceptions
Payor Processing Status:	All Statuses	Special Cases:	

Use the Special Cases filter to review specific types of responses found in the ERA

Charges 100% adjusted  
Claims queued to subsequent insurance  
Copay amounts changed  
Payments less than the allowable  
Payments more than the allowable  
Submitted if different (CPT Code)



# Review a Posted ERA By Adjustment Reason

Payments less than the allowable		13
Payments more than the allowable		70
Submitted if different (CPT Code)		5

Display: All Payments

Posting Exceptions: All Posting Exceptions

Payor Processing Status: All Statuses

Special Cases:

Adjustment Reasons Selector

Print

Back

# Review a Posted ERA By Adjustment Reason - Cont.

Select the CARC and RARC codes to be viewed with the Special Cases Adjustment Reasons filter

Select AllSelect None

Search Filter: filing

Include	Type	Code	Description
<input checked="" type="checkbox"/>	CARC	29	The time limit for filing has expired.
<input checked="" type="checkbox"/>	CARC	B4	Late filing penalty.
<input checked="" type="checkbox"/>	RARC	MA119	Provider level adjustment for late claim filing applies to this claim.
<input type="checkbox"/>	RARC	N137	Alert: The provider acting on the Member's behalf, may file an appeal with the Payer. The provider, ...
<input type="checkbox"/>	RARC	N220	Alert: See the payer's web site or contact the payer's Customer Service department to obtain forms

CancelSave

# Review Provider Level General Adjustments on ERAs

<b>Autopost Processing Summary:</b>		<b>Posting Exceptions:</b>	
Payment:	16,450.04    35 claims	Did not find a payment to reverse	6
Adjustment:	17,948.16	Did not find an adjustment to reverse	6
General Adjustments:	308.09	Procedure code not found in the charge history for this claim	138
Exceptions:	4,468.44    110 claims	Total of payments and adjustments was greater than the pending amount	4
Check Amount:	21,218.57    145 claims	Total:	154
<b>Payor Processing Status:</b>		<b>Special Cases:</b>	
Primary:	142	Charges 100% adjusted	18
Primary, Forwarded:	1	Claims queued to subsequent insurance	1
Reversal:	2	Copay amounts changed	9
Total:	145	General Adjustments	1
		Payments less than the allowable	16
		Payments more than the allowable	70
		Submitted if different (CPT Code)	5

<b>General Adjustments</b>						
Date	Description	Reference ID	NPI	Provider	Payment	
12/31/24	Overpayment Recovery	22222222 55555 1999999	1999999	Winooski Pediatrics Association	308.09	
TOTALS:					308.09	
General Adjustments cannot be autoposted.						
Display:	All Payments	Posting Exceptions:	All Posting Exceptions			
Payor Processing Status:	All St...	Special Cases:				
<div>Adjustment Reasons Selector</div> <div>Print</div> <div>Back</div>						

# Review Procedure Names as You Manually Post Insurance Payments

**Insurance Payments** Pebbles Flintstone 10 years 07/06/14 F

Posting History (Fred Flintstone)

Transaction Date: 07/29/24  
Check Number: 1111111111  
Payment Type: Ins Pmt  
Adjustment Type: Ins Adj  
Current Policy: Aetna HDHP  
Next Policy: Personal

**Distribution:**

Date of Service	CPT	Charge Amount	Expected Copay	Pending Insurance	Payment	Adjustment	Personal Balance	CARC: Code	Covered Amount	Negotiated Rate
07/26/24	99211	30.00	15.00	15.00	payment	adjustment	balance	3		0.00
07/26/24	87880	27.00	0.00	27.00	payment	adjustment	balance			0.00
07/26/24	87880	27.00	0.00	27.00	payment	adjustment	balance			0.00
Totals:		84.00	15.00	69.00						

Cancel Save Save + Post

**Distribution:**

Date of Service	CPT	Charge Amount	Expected Copay	Pending Insurance	Payment
07/26/24	99211	30.00	15.00	15.00	payment
OV Minimal					
07/26/24	87880	27.00	0.00	27.00	payment
Rapid Strep Screen					
07/26/24	87880	27.00	0.00	27.00	payment
Rapid Strep Screen					
Totals:		84.00	15.00	69.00	

# Reconcile or Prove Out Insurance Payments in the Report Library

Payment Totals by Check Number				
Compare posted insurance check payments against ERA/EOB amounts to ensure that all payments were entered.				
Posting Date: From 01/17/2025 to 01/17/2025				
Payment Class: Insurance				
Columns: All 5 Displayed Group By: None				
Posting User	Insurance Group	Transaction Date	Check Number	Total Payment Amount
Althea Beagley	CIGNA	01/17/2025	1234567	\$80.00
Althea Beagley	HealthyKids HMO	01/17/2025		
Althea Beagley	HealthyKids HMO	01/17/2025		

Payment Details by Check Number					
View details about each posted payment for a given check number to identify missing or improperly entered insurance payments.					
Posting Date: From 01/17/2025 to 01/17/2025					
Check Number: Contains 12345					
Payment Class: Insurance					
Columns: 6 Displayed Group By: None					
Transaction Date	Insurance Group	Check Number	Patient Name	Payment Amount	Posting User
01/17/2025	Private Insurance	1234567	Powell, Brian	\$80.00	Althea Beagley
01/17/2025	Health Assurance	1234567	Pearsol, Brady	\$15.00	Althea Beagley
01/17/2025	Health Assurance	1234567	Pearsol, Brady	\$25.00	Althea Beagley

# Review Detailed Claim History in PCC EHR

**Billing History**

Hannah Taglang16 years07/18/08F

04/25/22 Mark Williams, M.D., Burlington Peds - New North End

Totals:Charges: 300.00  
Master Card Payment: (20.00)  
Ins Pmt: (132.38)  
Ins Adj - Cigna Open Access 20 182223: (147.62)  
Balance: 0.00

**Claim Information:**  
Billing Provider: Beverly Crusher, MD

**Payments from 04/25/22:**

Amount	Type
20.00	Master Card Payment
20.00	applied to 04/25/22 Han Taglang 99214 OV Detailed H&E Beverly Crusher, MD

**Claim History:**

Date	Event	Insurance (PayorID)	Details	Claim ID	User
04/25/22 05:10pm	Claim Queued	Cigna PPO (62308)	Charges posted (PM)		
04/26/22 01:44pm	Claim Queued	Cigna PPO (62308)	Queued by PCC Support		
04/26/22 01:44pm	<a href="#">Claim Submitted</a>	Cigna PPO (62308)	(PM)	101010101	
04/26/22 06:20pm	<a href="#">Claim Acknowledged by PCC</a>	Cigna PPO (62308)		101010101	
04/27/22 07:20am	<a href="#">Claim Acknowledged by Payor</a>	Cigna PPO (62308)		101010101	
05/02/22 08:56am	Claim Adjudication Posted Manually	Cigna PPO (62308)	Check # 220428070002691 (PM)	101010101	

**Billing History Index**

Find Filter:

Find◀▶

Date	Provider of Service	Place of Service	Billing Status	Signed	Billing Account
04/25/22	Mark Williams, MD	Burlington Peds - New North End	Posted	Crusher	Tito Taglangy (# 46301)
04/05/22	Beverly Crusher, MD	Burlington Peds - New North End	Posted	Crusher	Tito Taglangy (# 46301)
10/30/21	Beverly Crusher, MD	Burlington Peds - New North End	Posted	Crusher	Tito Taglangy (# 46301)
09/14/21	Mark Williams, MD	Burlington Peds - New North End	Posted	Crusher	Tito Taglangy (# 46301)
08/03/21	Mark Williams, MD	Burlington Peds - New North End	Posted	Crusher	Tito Taglangy (# 46301)
08/01/20	Will S. Staller, M.D.	Chestnut Ridge Pediatric Associates	Posted	Staller	

Print

Payments

Create Encounter

Post Charges

View Documents

Close

Save

Save + Exit

# Read Claim Acknowledgements and Other Responses

## Claim History:

Date	Event	Insurance (PayorID)	Details	Claim ID	User
07/23/24 09:59pm	Claim Queued	Cigna PPO (62308)	Charges posted (PM)		
07/24/24 12:13pm	<a href="#">Claim Submitted</a>	Cigna PPO (62308)	(PM)	202020	
07/24/24 02:30pm	<a href="#">Claim Acknowledged by PCC</a>	Cigna PPO (62308)		202020	
07/24/24 08:40pm	<a href="#">Claim Acknowledged by Payor</a>	Cigna PPO (62308)			
07/29/24 10:09am	Claim Adjudication Auto-Posted	Cigna PPO (62308)			

Claim Acknowledged by Payor - 07/24/24 08:40pm

### Post-N-Track Claim Acknowledgment Report

Grayson Richard(Claim: 111111 202020) Find: 111111 202020 1 of 1

The following claims were ACKNOWLEDGED by Post-N-Track

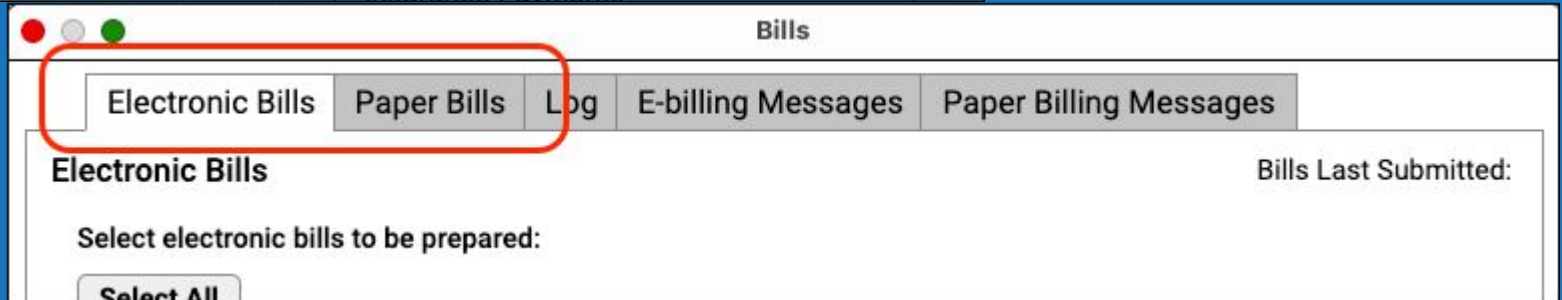
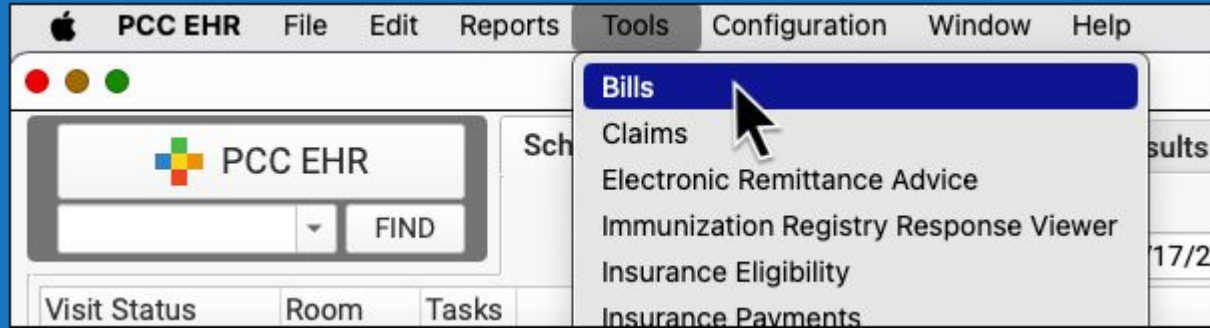
PATIENT/ CLAIM ID	PATIENT LAST NAME	PATIENT FIRST NAME	SERVICE DATE	CLAIM CHARGES	PAYOR ID
111111 202020	RICHARD	GRAYSON	20240723	480.00	62308
BILLING PROVIDER TAX ID: 12121212 PAYER CLAIM CONTROL NUMBER: 11111-030303030 SUBSCRIBER ID: UUU11122233 MESSAGES: A2 Acknowledgement/Acceptance into claim/encounter has been accepted 20 Accepted for processing.					
222222 303030	JOHNNY JOHN	JOHN			
BILLING PROVIDER TAX ID: 12121212 PAYER CLAIM CONTROL NUMBER: 11111-040404040 SUBSCRIBER ID: UUU11122233 MESSAGES: A2 Acknowledgement/Acceptance into adjudication system-The claim/encounter has been accepted into the adjudication system. 20 Accepted for processing.					
222222 303030	SCHUSTER	JAY	20240723	270.00	62308
BILLING PROVIDER TAX ID: 12121212 PAYER CLAIM CONTROL NUMBER: 11111-020202020					

When you open a file, PCC automatically searches for the patient's PCC ID and encounter claim ID, if available

Print Close



# Generate Personal Bills in PCC EHR





# Generate Personal Bills in PCC EHR - Cont.

Electronic Bills | Paper Bills | Log | E-billing Messages | Paper Billing Messages

### Electronic Bills - Prepared

Bills Last Submitted: 07/17/24

642 Electronic bills are prepared to submit.

- 61 Current
- 32 Overdue 30 days
- 18 Overdue 60 days
- 14 Overdue 90 days
- 517 Overdue 120 days

Review total number of prepared bills and optionally work with accounts

Start Over | Work With Accounts | Close | Submit E-bills

# Generate Personal Bills in PCC EHR - Cont.

Electronic Bills

Paper Bills

Log

E-billing Messages

Paper Billing Messages

Electronic Bills - Prepared - Work With Accounts

Bills Last Submitted: 07/17/24

Account	Current	Overdue 30	Overdue 60	Overdue 90	Overdue 120+	Total
Achey, Jeremy	56.00	0.00	0.00	0.00	0.00	56.00
Acker, Paul M	505.60	102.00	0.00	0.00	0.00	607.60
Acord, Nancy	0.00	0.00	0.00	0.00	20.00	20.00
Adam, Scott L.	0.00	52.00	0.00	0.00	0.00	52.00
Addington, Jeffrey	0.00	0.00	0.00	0.00	207.00	207.00
Albert, Janet	0.00			0.00	10.00	10.00
Altland, David	0.00			0.00	76.00	76.00
Alviani, Michael	0.00			0.00	293.00	293.00
Anderson, Debra	15.98	15.98	0.00	1.80	43.20	76.96

As you review accounts with prepared bills, you can jump to the Payments tool, Correct Mistakes, or preview the bill

Payments

Correct Mistakes

Preview Bill

Back

# Review a Log of Bills Sent

Electronic Bills

Paper Bills

Log

E-billing Messages

Paper Billing Messages

Log

Date	User	Aging Categories
07/29/24 2:29pm	Mark Williams, M.D.	30, 60, 90
07/29/24 2:12pm	Mary Lockwood	Current

The log tab displays an entry for every time your practice generated a batch of bills

Close

View

# Review a Log of Bills Sent Cont.

Electronic Bills

Paper Bills

Log

E-billing Messages

Paper Billing Messages

Log - Bill Run 07/29/24 2:12pm

☒ Accounts Billed ☐ Accounts Not Billed

Aging: Current

Search:

Name	Account #	Billed Amount
Jeremy Achey	1465	56.00
Roseanne Baird	732	100.00
Joseph Bauer	1745	41.00
Daniel Bauman	503	20.00
Dan Benovy	1535	534.00
Jeffrey Brewer	482	10.00
Brian Burgdorf	561	355.00
Darlene Bybel	334	15.00

Back

View Bill

# Review a Log of Bills Sent - Cont.

Electronic Bills

Paper Bills

Log

E-billing Messages

Paper Billing Messages

Log - Bill Run 07/29/24 2:12pm- View Bill

Account: Dan Benovy (Account #1535) Amount: 1535

Find:

Dan Benovy  
Eden, VT 05652

PCC Pediatric Test Associates  
20 Winooski Falls Way  
Suite 7  
Winooski, VT 05404-2228

ACCOUNT#: 1535 FROM: 01/01/00 - 07/29/24 PAGE: 1

DATE	DESCRIPTION OF SERVICES	CHARGES	PAYMENTS	INS DUE	PATIENT DUE
Ryan Benovy (Dr. Williams, Winooski)					
07/04/24	New Pt OV Detailed H&E	\$ 95.00		\$ 0.00	\$ 95.00
Madison A Benovy, III. (Dr. Davidson, Winooski)					
07/11/24	OV Expanded Focus	\$ 56.00		\$ 0.00	\$ 56.00
Ryan Benovy (Dr. Gomez, Winooski)					
07/16/24	OV Detailed H&E	\$ 87.00		\$ 0.00	\$ 87.00
07/16/24	Nebulizer Treatment	\$ 35.00		\$ 0.00	\$ 35.00
07/16/24	Nebulizer Repeat Treatment	\$ 35.00		\$ 0.00	\$ 35.00
07/16/24	OV Sunday/Holiday Diff	\$ 23.00		\$ 0.00	\$ 23.00
07/16/24	Neb Admin Set	\$ 8.00		\$ 0.00	\$ 8.00
Ryan Benovy (Dr. Davidson, Winooski)					

Back

# Edit Your Practice's Billing Messages

Electronic Bills

Paper Bills

Log

**E-billing Messages**

Paper Billing Messages

## E-billing Messages

Default Billing Message (used when an aging category does not have a message)

**Aging-based billing Messages:**

Current Bills Message

Your prompt attention to this account balance is greatly appreciated.

Overdue 30 days Bills Message

Your account is now 30 days past due. Your prompt attention to this balance is greatly appreciated.

Overdue 60 days Bills Message

Your account is now 60 days past due. We would appreciate immediate payment. Please remit.

Close

Save

# Features Added in 10.2

# Print a Single Account Statement in PCC EHR

**Payments**

Jeffrey AddingtonAccount #1238730 Grandview Drive

PostingHistory

**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:

Transaction Date	Amount	Payment Type	Check Number	Refunds/Reversals	Unapplied Amount
► 09/14/24	81.59	Ins Pmt - Capital Blue Cross	100538215		0.00
	3.41	Ins Adj - Capital Blue Cross			0.00
► 07/17/24	0.00	Ins Pmt - Capital Blue Cross			0.00
► 06/27/24	10.00	TOS Cash Payment			0.00
► 06/21/24	26.16	Ins Pmt - Capital Blue Cross	100474255		0.00
	18.84	Ins Adj - Capital Blue Cross			0.00
► 06/21/24	26.16	Ins Pmt - Capital Blue Cross	100474255		0.00
	18.84	Ins Adj - Capital Blue Cross			0.00

Print Receipt

Print Statement

Refund Credits

Reverse Payment

Edit

Close



# Print a Single Account Statement in PCC EHR - Cont.


aging	0-29 days	30-59 days	60-89 days	90-119 days	120+ days	Credit	Total Balance
Person	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Insurance	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Medical	0.00	0.00	0.00	0.00	0.00	0.00	0.00
End	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Payment	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Jeffrey	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Transaction	0.00	0.00	0.00	0.00	0.00	0.00	0.00
09/	0.00	0.00	0.00	0.00	0.00	0.00	0.00
07/17/24	0.00	0.00	0.00	0.00	0.00	0.00	0.00
0.00 Ins Pmt - Capital Blue Cross	0.00	0.00	0.00	0.00	0.00	0.00	0.00

**Confirmation - Print Statement**

Print a billing statement for all personal due balances on the account.

Custom Message: As we discussed on 2024-01-12, please pay in full for Abigail's charges. Call me with any questions. (Joan, 800-555-1212)

# Record Encounter Billing Notes

 PCC EHR

**Abigail Addington\*** PCC# 2503

Patient Check-In

Appointment Details

Forms

Account Notes

Patient Demographics

Account Demographics

Patient Portal Users

Personal Contacts

Policies

Insurance Eligibility

Account Balances

Time of Service Payments

Communication Preferences

**Encounter Billing Notes**

**Patient Check-In**

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

☐ Email

☐ Mailing Address

☐ No Preference

**Immunization Registry Communication Preferences**

Share with Registry: ☐ Undetermined ☒ Yes ☐ No


Preferred Contact Method for the Immunization Registry:

**Encounter Billing Notes**

New Note: ☒

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.

# Record Encounter Billing Notes - Cont.

 PCC EHR

**Abigail Addington\*** PCC# 2503

History

**Post Charges: 12/03/24**

Patient Details

Post Charges

Appointment Details

Diagnoses

Procedures

Claim Information

Payments

Receipts

**Encounter Billing Notes**

**Post Charges**

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

Payment Type	Amount	Check #	Apply to Today's Visit	Apply to Prev Bal	Unapplied
TOS Cash Payment	10.00		10.00	0.00	0.00

Add Payment

**Receipts**

☐ Generate a receipt

**Encounter Billing Notes**

New Note


12/03/24 Mark Williams, M.D.

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.

Add Comment:

Got updated insco information and scanned new card.

# Record Encounter Billing Notes - Cont.

 PCC EHR

**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:

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)	

# Record Encounter Billing Notes - Cont.

 PCC EHR

Abigail Addington\* PCC# 2503

History

Edit Charges: 12/03/24

Patient Details

Edit Charges

Appointment Details

Diagnoses

Procedures

Claim Information

Payments

**Encounter Billing Notes**

**Edit Charges**

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

Payment Type	Amount	Check #	Apply to Today's Visit	Apply to Prev Bal	Unapplied
<input type="text"/>	0.00	<input type="text"/>	0.00	0.00	0.00

Add Payment

**Encounter Billing Notes**

New Note

New Note:

▼ 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.

Previous Next Visit Note Cancel Save + Post

# Record the Payor Claim Control Number for Claim Responses from Payers

When you process an ERA in the Electronic Remittance Advice tool, PCC EHR will automatically record the Payor Claim Control number for each response to each encounter.

When you manually post the payer's response in the Insurance Payments tool, you can enter the Payor Claim Control number along with the check number.

# Record the Payor Claim Control Number for Claim Responses from Payers - Cont.

**Insurance Payments**

Abigail Addington9 yrs, 11 mos12/15/14F

Posting

History (Jeffrey Addington)

Patient Flags: Chronic, Burlington Pediatrics  
Account Flags:

**Insurance Payment:**

Transaction Date

Check Number

Payor Claim Control #

Payment Type

Adjustment Type

Current Policy

Next Policy

12/03/24

1111111

202411AXX55555

Ins Pmt

Ins Adj


Capital Blue Cross \$10 OV&WC-Other

Personal

**Distribution:**

Date of Service	CPT	Charge Amount	Expected Copay	Pending Insurance	Payment	Adjustment	Personal Balance	CARC: Code	Covered Amount
12/03/24	99213	100.00	0.00	100.00	payment	adjustment	balance		
12/03/24	97880	30.00	0.00	30.00	payment	adjustment	balance		

# Record the Payor Claim Control Number for Claim Responses from Payers - Cont.

 PCC EHR

Abigail Addington PCC# 2503

History

Edit Charges: 12/03/24

Patient Details

Edit Charges

Appointment Details

Diagnoses

Procedures

**Claim Information**

Payments

Encounter Billing Notes

**Edit Charges**

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

**Claim Information** Service Provider: Crusher PCP: Williams

Billing Provider: Beverly Crusher, MD Emergency Visit: ☒ No ☐ Yes

Referring Provider: select a referring provider Accident Date:

EPSDT Referral Indicator:  Auto Accident: ☒ No ☐ Yes

Prior Authorization Number:  Accident State: select a state

Date First Seen:

Payor Claim Control #:

☐ Replace prior claim ☒ Add new claim prior claim


202411AXX5555 Capital Blue Cross 2024-12-03 #1111111

Claim Delay Reason:

☐ Queue a claim for this encounter



# Edit Encounter Charges

 PCC EHR

**Abigail Addington** PCC# 2503

Medical Summary

Demographics

History

Visit History

Immunization History

Flowsheets

Growth Charts

Documents

**Billing History**

PCC eRx

**Billing History**

Abigail Addington 9 yrs, 11 mos 12/21/14 F

**01/30/24 Beverly Crusher, MD, Winooski Pediatrics**  
Date of Service: 01/30/24  
Provider of Service: Beverly Crusher, MD  
Encounter Location: Winooski Pediatrics  
Place of Service: Winooski Pediatrics  
**Account:**  
Jeffrey Addington (Account #1238)  
730 Grandview Drive  
Saint Albans Bay, VT 05481  
**Primary Insurance Policy:**  
Aetna PPO \$10  
Certificate: 1111111  
Group: 1111  
**Diagnoses:**  
J20.2 Acute bronchitis due to streptococcus  
**Procedures:**  

CPT	Units	Description	Amount	Diagnoses
99214	1	OV Detailed H&E	87.00	J20.2

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

**Billing History Index**

Find Filter:   ◀ ▶

Date	Provider of Service	Place of Service	Billing Status	Signed	Billing Account	Docs
01/30/24	Beverly Crusher, MD	Winooski Pediatrics	Posted	n/a	Jeffrey Addington (# 1238)	
01/18/24	Mark Williams, M.D.	Burlington Peds - New North End	Not Ready		Jeffrey Addington (# 1238)	
01/17/24	Mark Williams, M.D.	Winooski Pediatrics	Posted	n/a	Jeffrey Addington (# 1238)	
01/10/24	Mark Williams, M.D.	zRural Hospital IH	Posted	n/a	Jeffrey Addington (# 1238)	

# Edit Encounter Charges - Cont.

**Edit Charges**

Abigail Addington9 yrs, 11 mos12/21/14F

**Encounter Details**

Provider of Service: Beverly Crusher, MD

Place of Service: Winooski Pediatrics

Date of Service: 01/30/24

**Diagnoses**

Include Dx on Claim	ICD-10	Description	Linked Procedures
<input checked="" type="checkbox"/>	J20.2	Acute bronchitis due to streptococcus	99214, 87880 <div>AllNoneSelect</div>

select an ICD-10 diagnosis

**Procedures**

Primary: AetnaSecondary: Capital Blue Cross

Procedures	Units	Price	Insurance	Ins Due	Ins Adj	Pers Due	Discount	Source
<input checked="" type="checkbox"/> 99214 OV Detailed H&E <div>Dx: 1) J20.2</div>	1	87.00	Primary	77.00	0.00	10.00	0.00	
<input checked="" type="checkbox"/> 87880 Rapid Strep Screen <div>Dx: 1) J20.2</div>	1	30.00	Primary	30.00	0.00	0.00	0.00	
<b>Totals:</b>		117.00		107.00	0.00	10.00	0.00	

select a procedure

PreviousNext

CancelSave + Post

Deselect a diagnosis or procedure to delete it from the encounter

# Edit Encounter Charges - Cont.

**Procedures** Primary: Aetna Secondary: Capital Blue Cross

Procedures	Units	Price	Insurance	ns Due	Ins Adj	Pers Due	Discount	Source
<input checked="" type="checkbox"/> 99214 OV Detailed H&E ▶ Dx: 1) J20.2	1	87.00	Primary	77.00	0.00	10.00	0.00	
<input checked="" type="checkbox"/> 87880 Rapid Strep Screen ▶ Dx: 1) J20.2	1	30.00	Secondary	30.00	0.00	0.00	0.00	
<b>Totals:</b>		117.00		107.00	0.00	10.00	0.00	

Use the Procedures component to pick a code modifier, change the responsible party, or adjust the copay amount

## Claim Information

Service Provider: Crusher PCP: Williams

Billing Provider: Beverly Crusher, MD

Referring Provider: select a referring provider

EPSDT Referral Indicator:

Prior Authorization Number:

Date First Seen:

Payor Claim Control #:

☐ Replace prior claim ☐ Void/cancel prior claim

Claim Delay Reason:

☒ Queue a claim for this encounter (Aetna)

Emergency Visit: ☒ No ☐ Yes

Accident Date:

Auto Accident: ☒ No ☐ Yes

Accident State: select a state

Add Attachment

Use the Claim Information section to edit encounter information that appears on a claim submission

# Resubmit a Claim

Prior Authorization Number:  Accident State:

Date First Seen:

**Add Attachment**

Payor Claim Control #:

☐ Replace prior claim ☐ Void/cancel prior claim

202411AXX55555 Capital Blue Cross 2024-12-03 #1111111

Claim Delay Reason:

☐ Queue a claim for this encounter

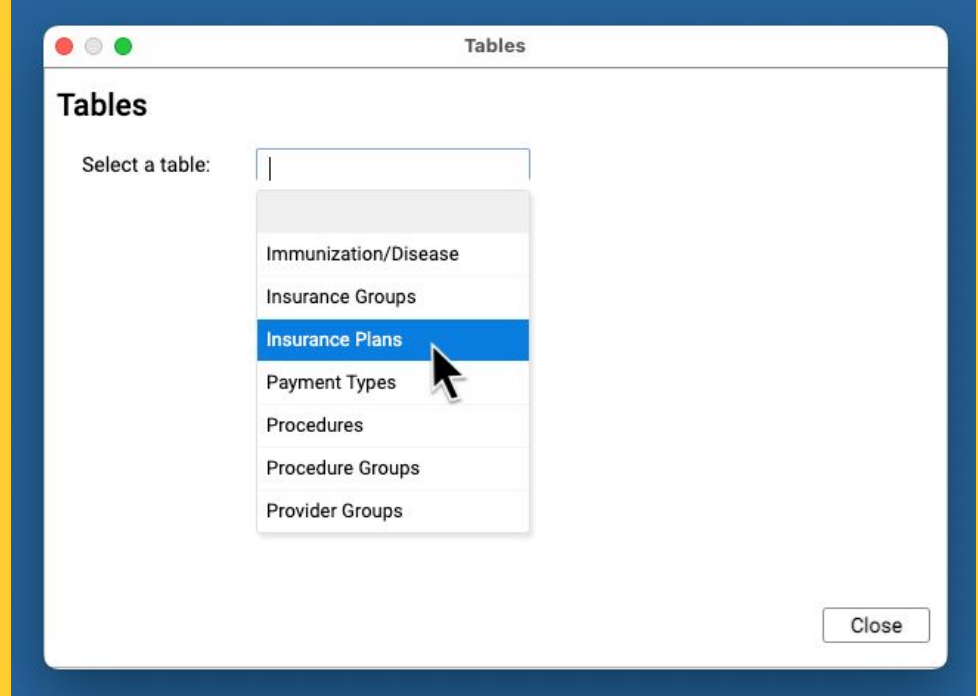
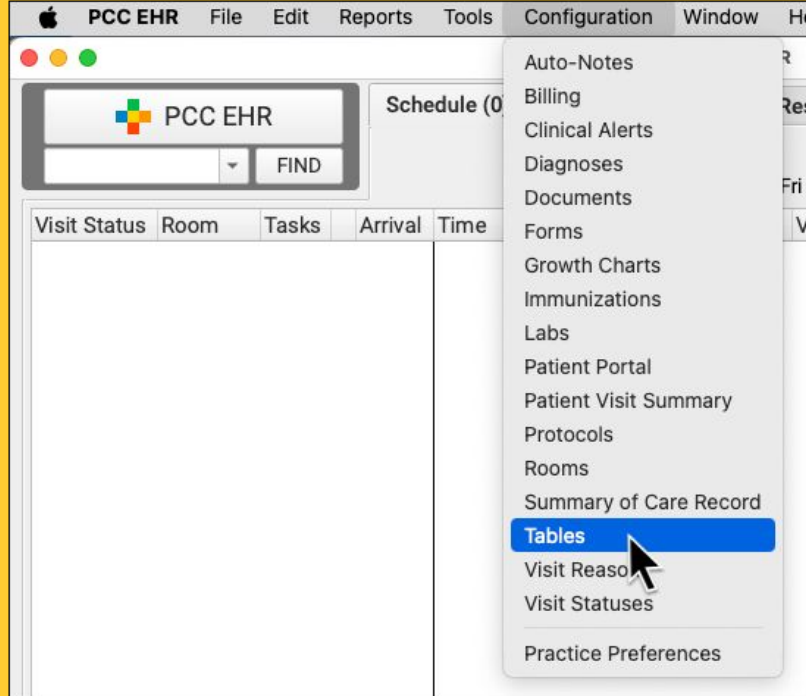
Payor Claim Control #:

☒ Replace prior claim ☐ Void/cancel prior claim

Claim Delay Reason:

☐ Queue a claim for this encounter (Active)

# Edit Your Practice's Configuration Tables



# Edit Your Practice's Configuration Tables - Cont.

Insurance Plans

350 Entries

Search Filter:

Insurance Plan ▲	Copay Amount ▲	Payor ID ▲	Address ▲	Insurance Group ▲	Last Modification ▲
Aetna 10 Capitated	10.00	60054	P.O. Box 91522, Arlington, TX, 76015-0022	Aetna MC & Elect	11/19/2024 11:37:43 AM
Aetna 10 Schedule B	10.00	60054	P.O. Box 91522, Arlington, TX, 76015-0022	Aetna MC & Elect	11/19/2024 11:37:43 AM
Aetna EPO \$10 Box 91522	10.00	60054	P.O. Box 91522, Arlington, TX, 76015-0022	Aetna MC & Elect	11/19/2024 11:37:43 AM
Aetna EPO \$15 Box 91522	15.00	60054	P.O. Box 91522, Arlington, TX, 76015-0022	Aetna MC & Elect	11/19/2024 11:37:43 AM
Aetna HDHP	15.00	60054	PO Box 981106, El Paso, TX, 79998-1106	Aetna HDHP	11/19/2024 09:33:45 AM
Aetna MC \$10 3541 Winchester	10.00	60054	3541 Winchester Rd, Greensboro, NC, 27420	Retired Insurance Plans	11/19/2024 11:37:43 AM
Aetna MC \$10 3541 Winchester	10.00	60054	3541 Winchester Rd, Allentown, PA, 18195-0501	Retired Insurance Plans	11/19/2024 11:37:43 AM
Aetna MC \$10 Box 1125	10.00	60054	PO Box 1125, Blue Bell, PA, 19422	Aetna MC & Elect	11/19/2024 11:37:43 AM
Aetna MC \$10 Box 129002	10.00	60054	PO Box 129002, San Diego, CA, 92112-9001	Retired Insurance Plans	11/19/2024 11:37:43 AM
Aetna MC \$10 Box 150447	10.00	60054	PO Box 150447, Hartford, CT, 06115-0447	Retired Insurance Plans	11/19/2024 11:37:43 AM
Aetna MC \$10 Box 24024	10.00	60054	PO Box 24024, Fresno, CA, 93779-4024	Retired Insurance Plans	11/19/2024 11:37:43 AM
Aetna MC \$10 Box 26098	10.00	60054	PO Box 26098, Greensboro, NC, 27420	Retired Insurance Plans	11/19/2024 11:37:43 AM
Aetna MC \$10 Box 3932	10.00	60054	PO Box 3932, Allentown, PA, 18106-0932	Retired Insurance Plans	11/19/2024 11:37:43 AM
Aetna MC \$10 Box 5569	10.00	60054	PO Box 5569, Akron, OH, 44334-0569	Retired Insurance Plans	11/19/2024 11:37:43 AM
Aetna MC \$10;Full WC	10.00	60054	PO Box 2907 Loop Station, Minneapolis, MN, 55402	Retired Insurance Plans	11/19/2024 11:37:43 AM
Aetna MC \$15 Box 1125	15.00	60054	PO Box 1125, Blue Bell, PA, 19422	Aetna MC & Elect	11/19/2024 11:37:43 AM

Export

History

Add

Clone

Edit

Back

# Edit Your Practice's Configuration Tables - Cont.

**Insurance Plans — Clone**Adding Entry

Insurance Plan:

Short Name:

Insurance Group:

Address:

PO Box 5200

address 2

Scranton

PA

18505-5200

Phone:

**Copayment**

Copay Amount:

Copay Office POS: ☒ Yes ☐ No

Copay Hospital POS: ☐ Yes ☒ No

Copay Per Procedure: ☐ Yes ☒ No

When you clone an existing table entry, you only need to update the details that differ in the new entry

Cancel

Save

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**PCC**  
Pediatric EHR Solutions



# Edit Your Practice's Procedures and Prices

Procedures										
581 Entries										
Search Filter: <input type="text"/>										
Procedure	Procedure Group	Code	Price	Units	Accounting Type	Type of Service	NDC	Dose Amount	Dose Units	Last Modification
+OV Comprehensive	Office Visits	99215-25	130.00	1	Revenue	Medical				12/02/2024 03:38:02 PM
+OV Detailed	Office Visits	99214-25	120.00	1	Revenue	Medical				12/02/2024 11:58:38 AM
+OV Expanded	Office Visits	99213-25	100.00	1	Revenue	Medical				12/02/2024 03:50:13 PM
+OV Problem Focused	Office Visits	99212-25	80.00	1	Revenue	Medical				12/02/2024 11:58:02 AM
1 Immuniz Admin W/O MD Counseling	Immunizations	90471	30.00	1	Revenue	Medical				12/02/2024 03:50:58 PM
1 Immuniz Admin W/O MD Counseling	Immunizations	90473	30.00	1	Revenue	Medical				12/02/2024 03:51:05 PM
10 Admin-Hep B Immun	Immunizations	G0010	10.00	1	Revenue	Medical				12/02/2024 03:52:23 PM
2+ Immuniz Admin W/O MD Counseling	Immunizations	90472	20.00	1	Revenue	Medical				12/02/2024 03:58:07 PM
2+ Immuniz Admin W/O MD Counseling	Immunizations	90474	10.00	1	Revenue	Medical				12/02/2024 03:59:08 PM
8 Admin-Flu Vaccine	Immunizations	G0008	10.00	1	Revenue	Medical				12/02/2024 12:02:08 PM
9 Admin-Pneumococcal Vaccine	Immunizations	G0009	10.00	1	Revenue	Medical				12/02/2024 12:02:17 PM
Ace Bandage	Supplies	E1399	10.00	1	Revenue	Medical				12/02/2024 12:02:22 PM
Admin Patient Health Risk Assess	Supplies	96160	0.00	1	Revenue	Medical				12/03/2024 04:10:02 PM
Admin/Interp of Health Risk Assess	Supplies	99420	0.00	1	Revenue	Medical				12/03/2024 04:25:28 PM
Adrenaline Injection	Injections	J0170	20.00	1	Revenue	Medical				12/02/2024 04:36:56 PM
<div>ExportHistoryAddCloneEditBack</div>										



# Edit Your Practice's Procedures and Prices - Cont.

**Procedures — Clone**Adding Entry

Procedure:

Procedure Group:

Type of Service:

Accounting Type:

Units:

**Drug Identification**

NDC:

(Format: #####-####-##)

Dose Amount:

Dose Units:

**Codes and Prices**

Schedule Code	Schedule Price
A: <input type="text" value="92551"/>	A: <input type="text" value="30.00"/>
<input type="button" value="Duplicate Code (A)"/>	<input type="button" value="Duplicate Price (A)"/>
B: <input type="text" value="92551"/>	B: <input type="text" value="25.00"/>

# Edit Your Practice's Procedures and Prices - Cont.

Codes and Prices

Schedule Code

A:

Duplicate Code (A)

B:

C:

Duplicate Code (A)

B:

C:

D:

E:

F:

G:

H:

I:

J:

Schedule Price

A:

Duplicate Price (A)

B:

C:

D:

E:

F:

G:

H:

I:

J:

K:

Duplicate Price (A)

B:

C:

D:

E:

F:

G:

H:

I:

J:

# Write Off Account Credits

**Payments**

Jeffrey AddingtonAccount #1238730 Grandview Drive

PostingHistory

**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	-8.00	-8.00
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**

Jeffrey Addington (Account # 1238)

Search Filter:

Transaction Date	Amount	Payment Type	Check Number	Refunds/Reversals	Unapplied Amount
12/10/24	225.00	Personal Check Payment			8.00
10/12/24	81.59	Ins Pmt - Capital Blue Cross	100538215		0.00
	3.41	Ins Adj - Capital Blue Cross			0.00
08/14/24	0.00	Ins Pmt - Capital Blue Cross			0.00
07/25/24	10.00	TOS Cash Payment			0.00

Print ReceiptPrint StatementRefund CreditsReverse PaymentEditClose

# Write Off Account Credits - Cont.

**Payment History - Refund Credit**

Transaction Date	Refund Type	Amount	Balance
12/10/24	Credit Write-Off	8.00	0.00

**Payment History** Search Filter:

Jeffrey Addington (Account # 1238)

Transaction Date	Amount	Payment Type	Check Number	Refunds/Reversals	Applied Amount
12/10/24	225.00	Personal Check Payment		12/10/24 Credit Write-Off	0.00
10/12/24	81.59	Ins Pmt - Capital Blue Cross	100538215		0.00
	3.41	Ins Adj - Capital Blue Cross			0.00
08/14/24	0.00	Ins Pmt - Capital Blue Cross			0.00
07/25/24	10.00	TOS Cash Payment			0.00

Please fill out the course survey in the  
app

# What Questions Do You Have?