Configure Your New Billing Tools in PCC EHR

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Session Objective

Customize billing tools to make your job easier.


Update Practice Preferences
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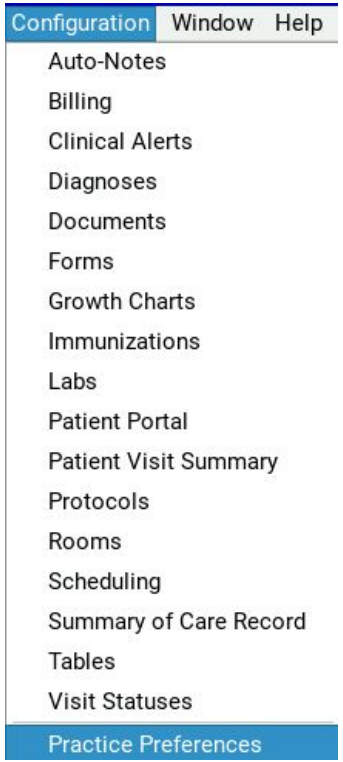
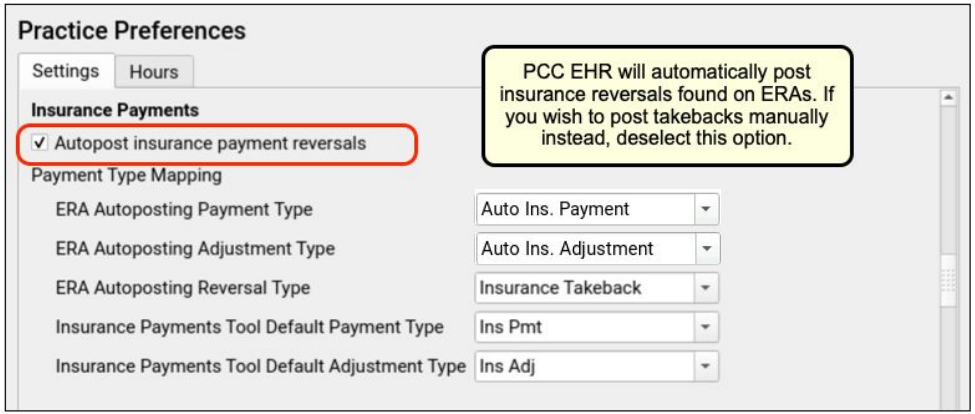
1. You can choose whether or not you want to allow the system to autopost reversals
2. Payment Type mapping will help differentiate between what was posted manually vs automatically.
3. You will be able to report on what was posted manually vs automatically.
4. This will help you diagnose an issue. Was the problem a human error vs autopost error.

Editing the Payment Type in the table

how this would look in the payment history.





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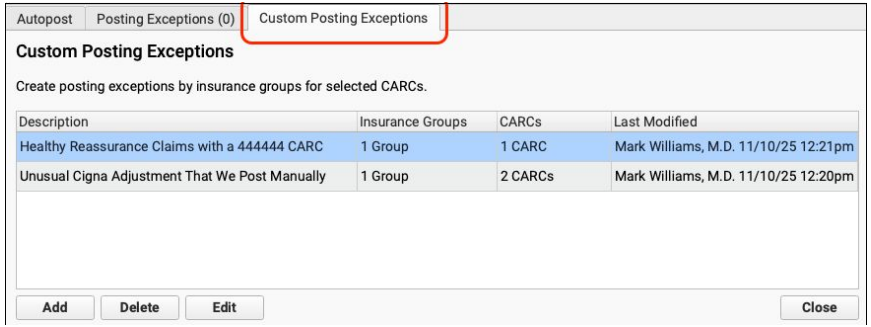
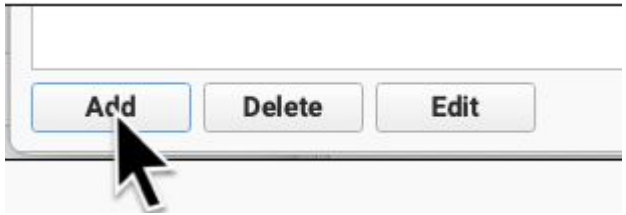
Navigate to the Custom posting exception tab in the ERA autoposting tool



Click the Add button to create a new Custom Posting Exception



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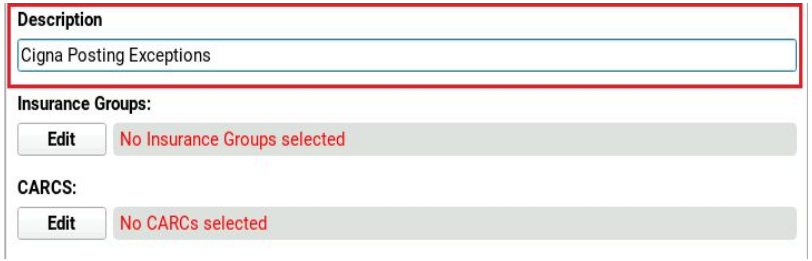
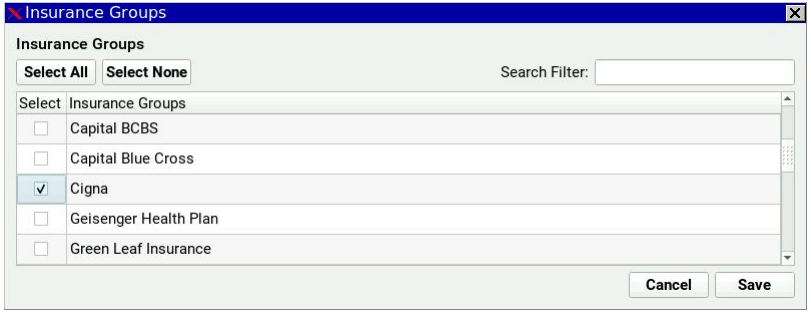
Give your custom posting exception a name



Select Edit for CARCS to assign the CARC exceptions

Select Edit for Insurance Groups to assign insurance groups



When all the fields are populated click Save

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Custom posting exceptions will appear like this on a posted ERA.

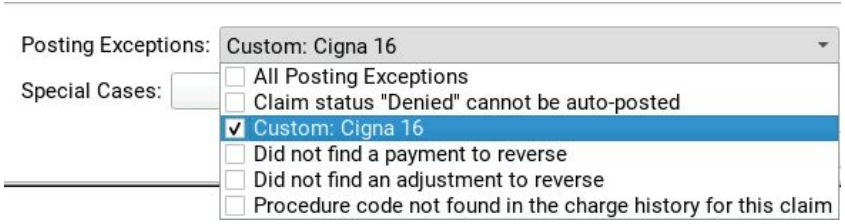
You can filter to view the custom posting exceptions using the posting exception filter in a processed ERA

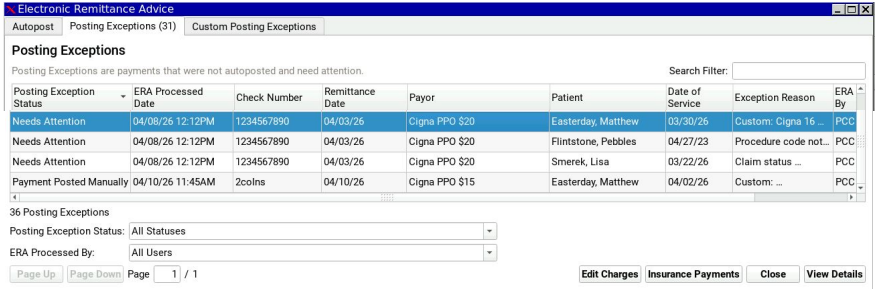
They also become available to review in the posting exception tab.

EASTERDAY, MATTHEW PCC ID: 2155
Payor Claim Control Number: 357159456 Ins ID: U09165718-03 Processed as Tertiary

Date	Procedure Code	Submitted (if diff)	Charge	Deductible	Copay/ Coinsurance	Personal Other	Total Personal Due	Contractual Adjustment	Other Adjustment	Payment
03/30/26	99214	99215	87.00	0.00	15.00 3 PR	0.00	15.00	32.00 45 CO	0.00	40.00
03/30/26	A7003		8.00	0.00	0.00	0.00	0.00	8.00 16 CO	0.00	0.00
03/30/26	94640		35.00	0.00	0.00	0.00	0.00	15.00 45 CO	0.00	20.00
TOTALS:			130.00	0.00	15.00	0.00	15.00	55.00	0.00	60.00

Charge 100% Adjusted (A7003)
CORE Business Scenario: Additional Information Required - Missing/Invalid/Incomplete Data from Submitted Claim (A7003)
Posting Exception: Procedure code not found in the charge history for this claim (CPT 99215)
Custom Posting Exception: Cigna 16 (CARC# 16) (CPT A7003)
▶ Key





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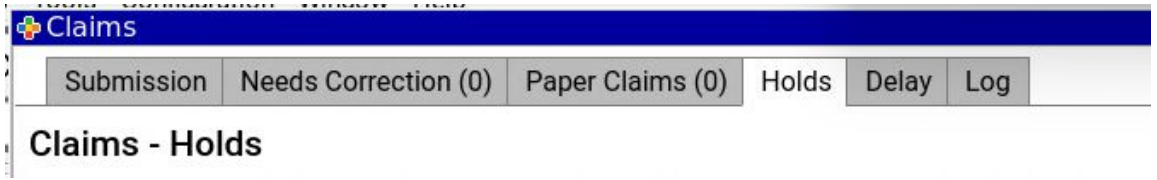
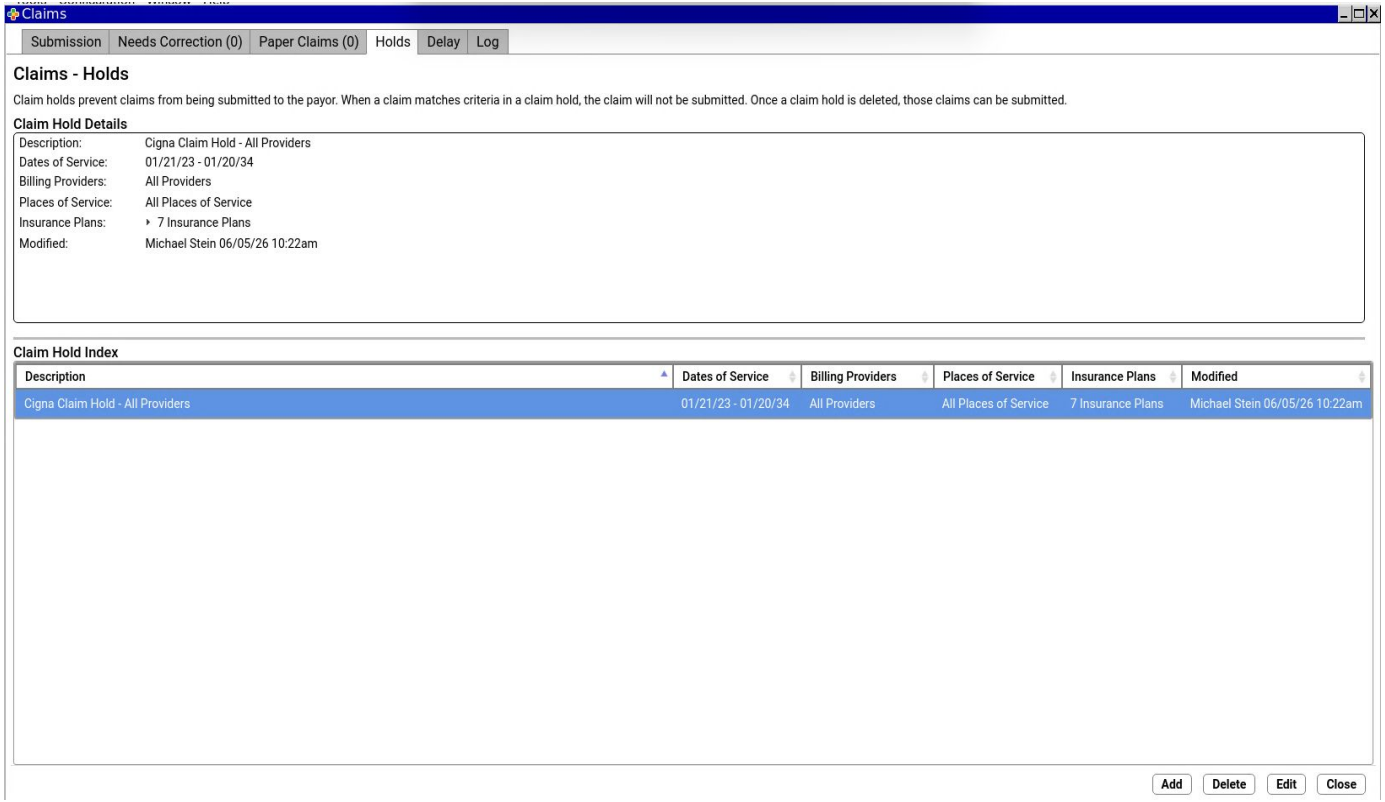
Open the claims tool

Click on the Holds tab

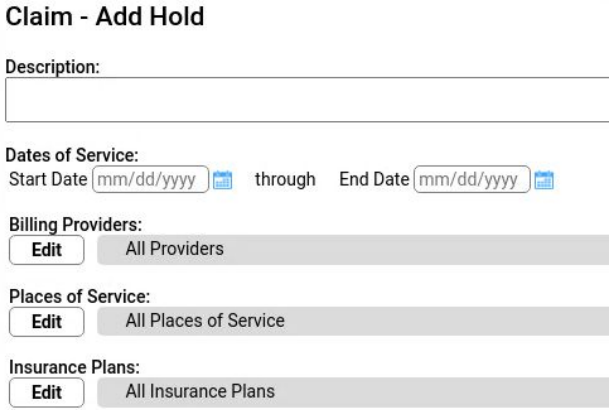


This will show all the custom claim holds you have in your system



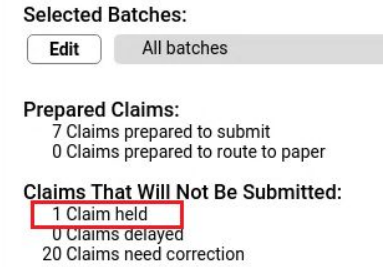
You can Add, Delete, or Edit your current claims holds.

When you click add you can see all the different criteria that can go into a claims hold rule.

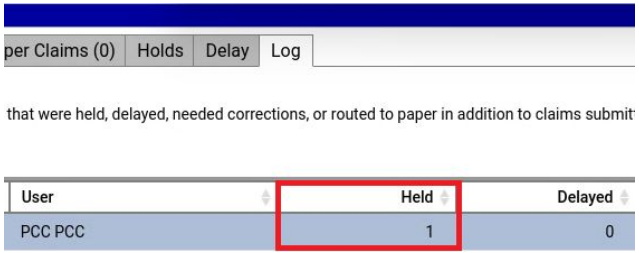


This claim hold will show up in multiple places

In the claims tool when processing



In the claims tool log after processing



And in the billing history, claim history for this encounter


Personal
Billing Fees
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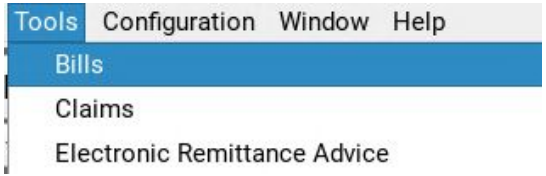
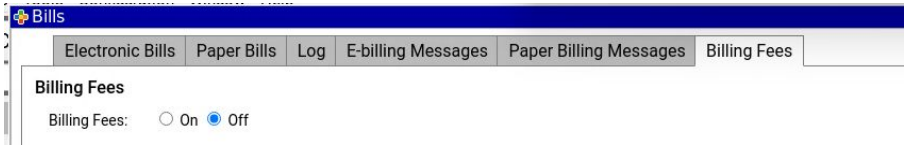
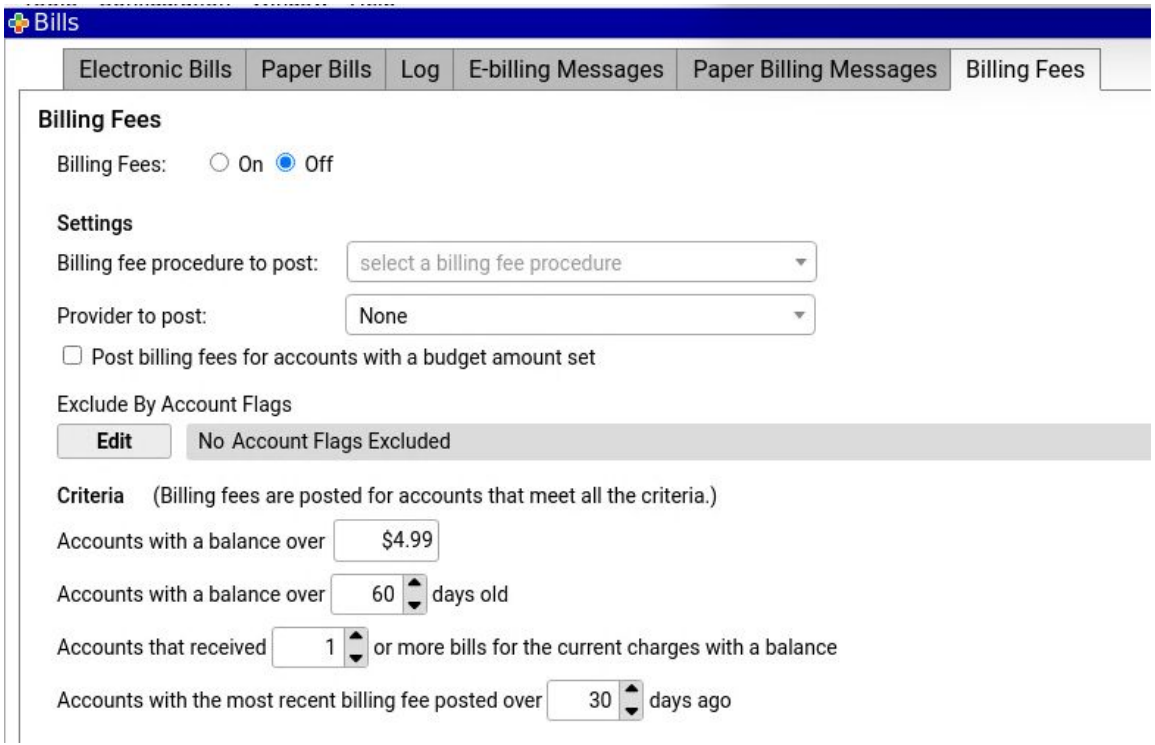
Navigate to Tools, Bills



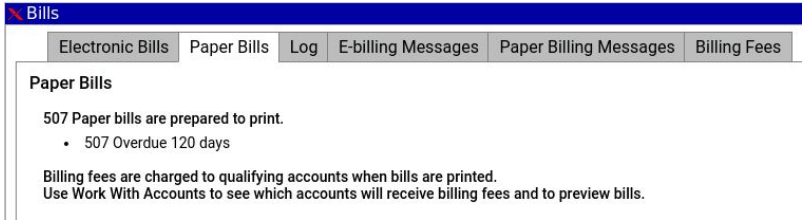
Click on the Billing Fees tab



This is where you will toggle billing fees on and off and add the criteria for them



When the billing fees are on you will be presented with this message when you prepare bills.



When you print bills you will see this message

If you choose work with accounts you can see everyone who will receive a billing fee.

Paper Bills

Bills Last Submitted: 06/10/2

Account	Current	Overdue 30	Overdue 60	Overdue 90	Overdue 120+	Total	Billing Fee To Be Posted
Acord, Nancy	0.00	0.00	0.00	0.00	20.00	20.00	
Addington, Jeffrey	0.00	0.00	0.00	0.00	207.00	207.00	25.00
Albert, Janet	0.00	0.00	0.00	0.00	10.00	10.00	
Altland, David	0.00	0.00	0.00	0.00	76.00	76.00	
Alviani, Michael	0.00	0.00	0.00	0.00	293.00	293.00	
Anderson, Debra	15.98	15.98	0.00	1.80	43.20	76.96	25.00

You can then view the billing fee information in the log

Log – Bill Run 06/12/26 9:53am

Aging: 120

Name	Account #	Billed Amount	Billing Fee
Nancy Acord	901	20.00	
Jeffrey Addington	1238	232.00	25.00
Janet Albert	987	10.00	
David Altland	700	76.00	
Michael Alviani	1740	293.00	
Debra Anderson	914	101.96	25.00

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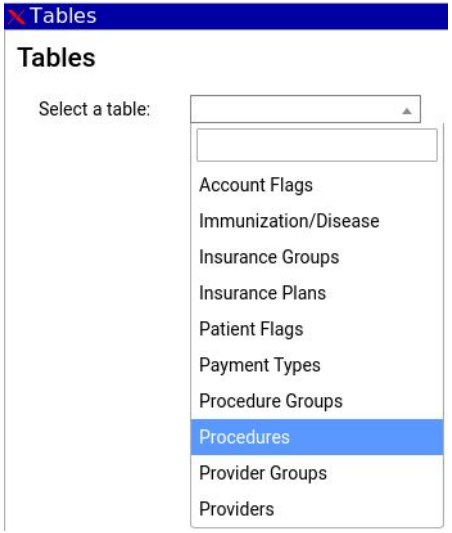
Go to Configuration, Tables

Click the dropdown and select a table



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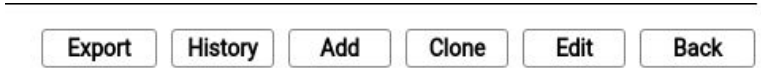
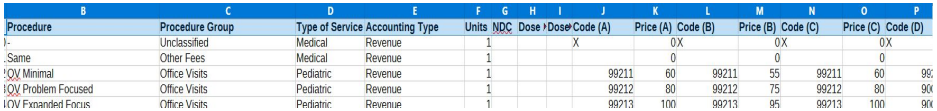
In the procedures table you will have button options in the lower right to help with configuration



When you export you will see more details in the export than in the regular table view



B	C	D	E	F	G	H	I	J	K	L	M	N	O	P
Procedure	Procedure Group	Type of Service	Accounting Type	Units	NDC	Dose	Dose	Code (A)	Price (A)	Code (B)	Price (B)	Code (C)	Price (C)	Code (D)
-	Unclassified	Medical	Revenue	1			X		0	X	0	X	0	X
Same	Other Fees	Medical	Revenue	1					0		0		0	
OV Minimal	Office Visits	Pediatric	Revenue	1				99211	60	99211	55	99211	60	99
OV Problem Focused	Office Visits	Pediatric	Revenue	1				99212	80	99212	75	99212	80	90
OV Expanded Focus	Office Visits	Pediatric	Revenue	1				99213	100	99213	95	99213	100	90

Use the search filter to find all codes starting with 9921

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Updating procedures has become much easier thanks to the save and next feature. Let's use updating pricing for sick visits as an example.

Starting at the top double click to edit the procedure.
Update the price and use duplicate Price to populate other schedules

Click Save + Next and work down the list of office visits.

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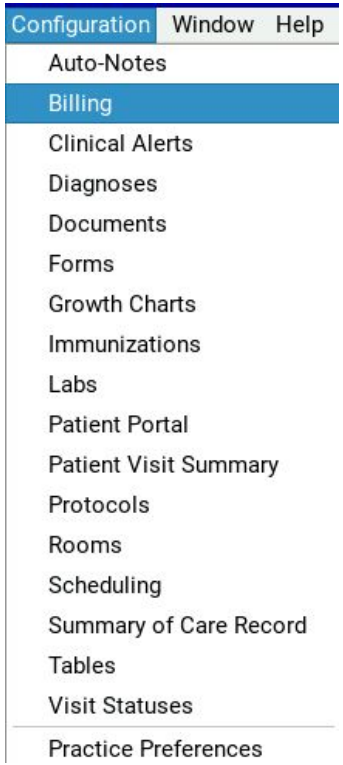
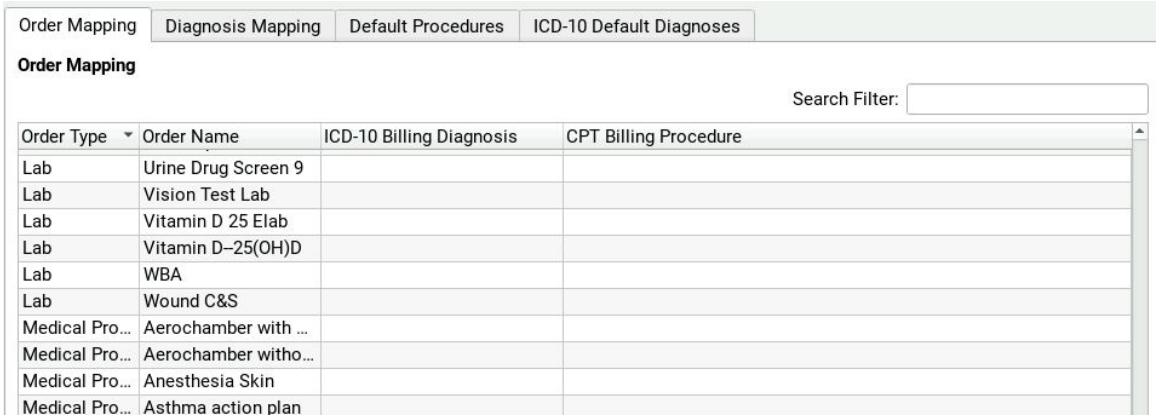
Go to Configuration Billing



There are four tabs at the top the operate different parts of the billing configuration.

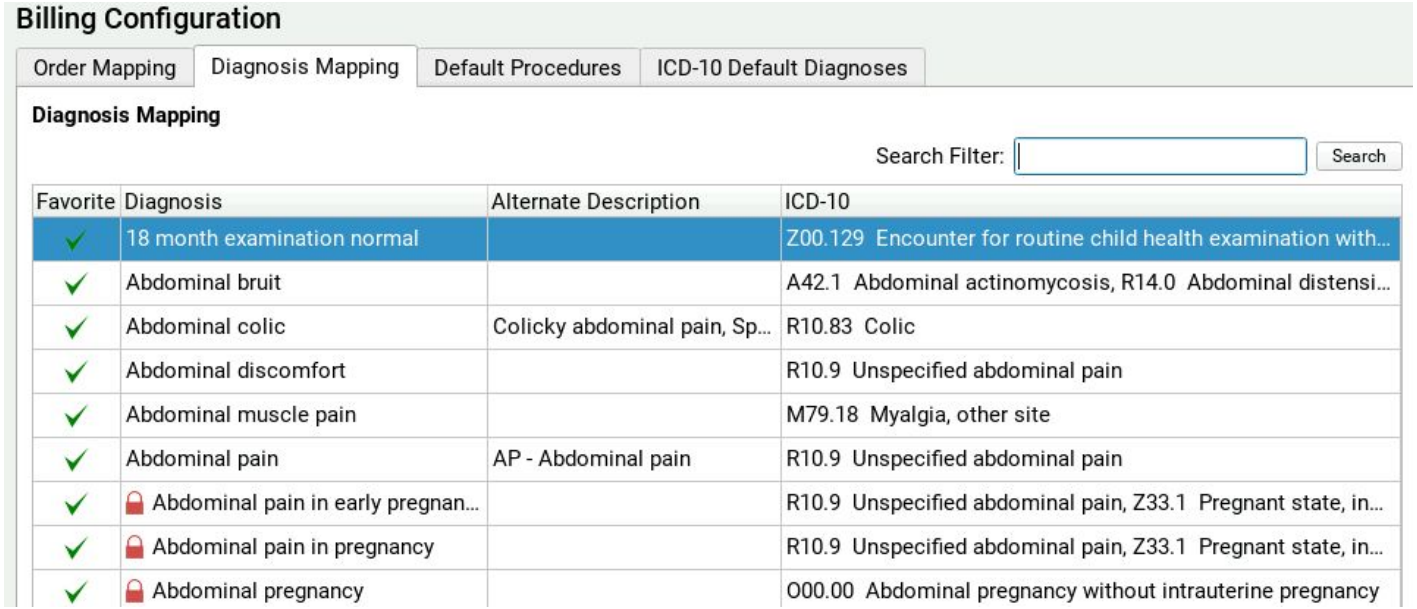
In Order Mapping list of all the orders in your system organized by order type will be available here. A search filter can be used to search for an order or find specific CPT/ICD10 that have been mapped.



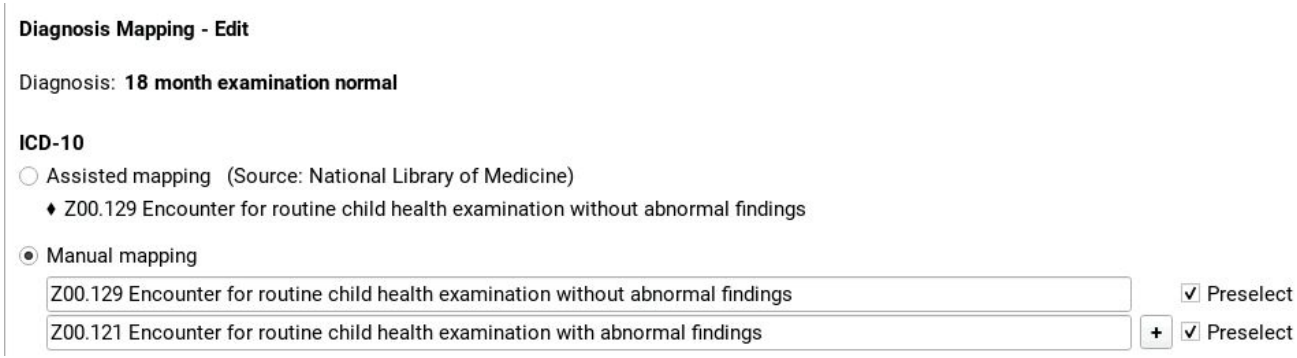
Order Mapping is used to have ICD-10 or CPT codes show automatically in the super bill. They link to orders in the EHR and when that order is used the mapped CPT/ICD-10 appear on the bill.

In this example of an in office Hemoglobin lab once this lab is ordered, a Z13.9 and a 85018 will appear on the bill checked off. The 36415 finger and heel stick will be available, but will not be auto selected.

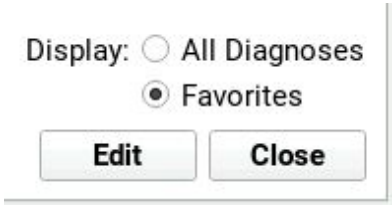
Diagnosis Mapping is all about taking SNOMED which is clinical by nature and mapping these to ICD-10 which are billing by nature.



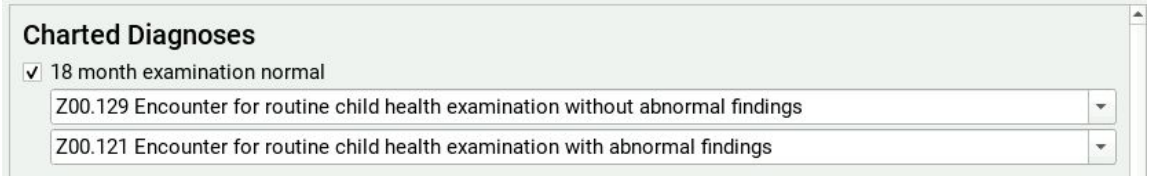
When editing these You will see a assisted mapping which is the EHR's suggested mapping for this SNOMED. You will also have the option to manually map to whichever ICD-10 you'd like.



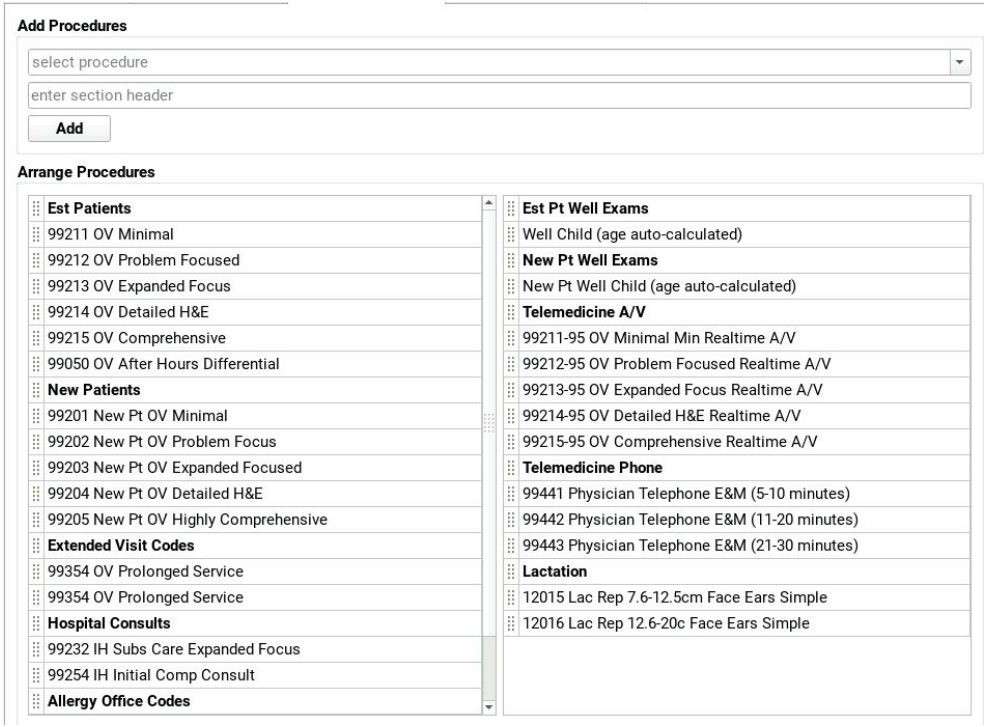
There is a toggle to view either favorites or all diagnosis in the bottom right.

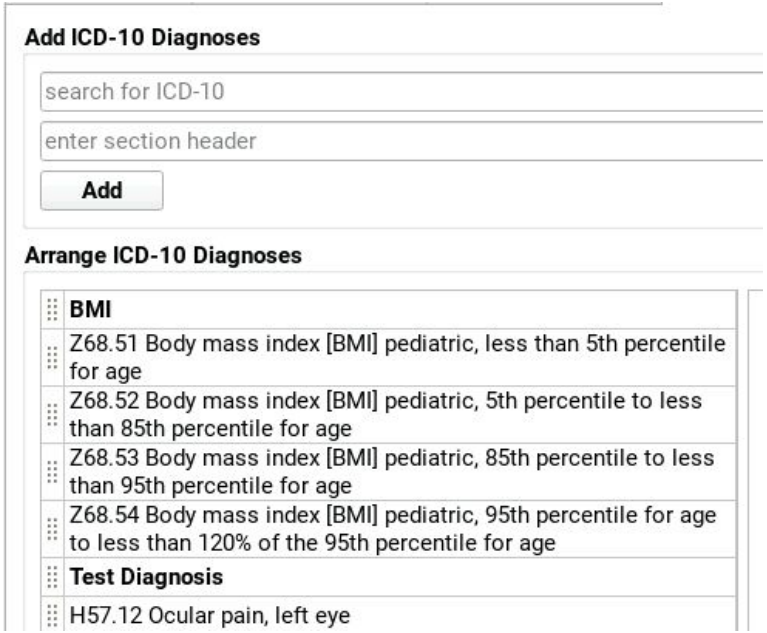


The preselect option will have it auto select these ICD-10 codes on the superbill.



Using Default Procedures and Default Diagnosis is a way to have certain codes here appear automatically on the super bill.





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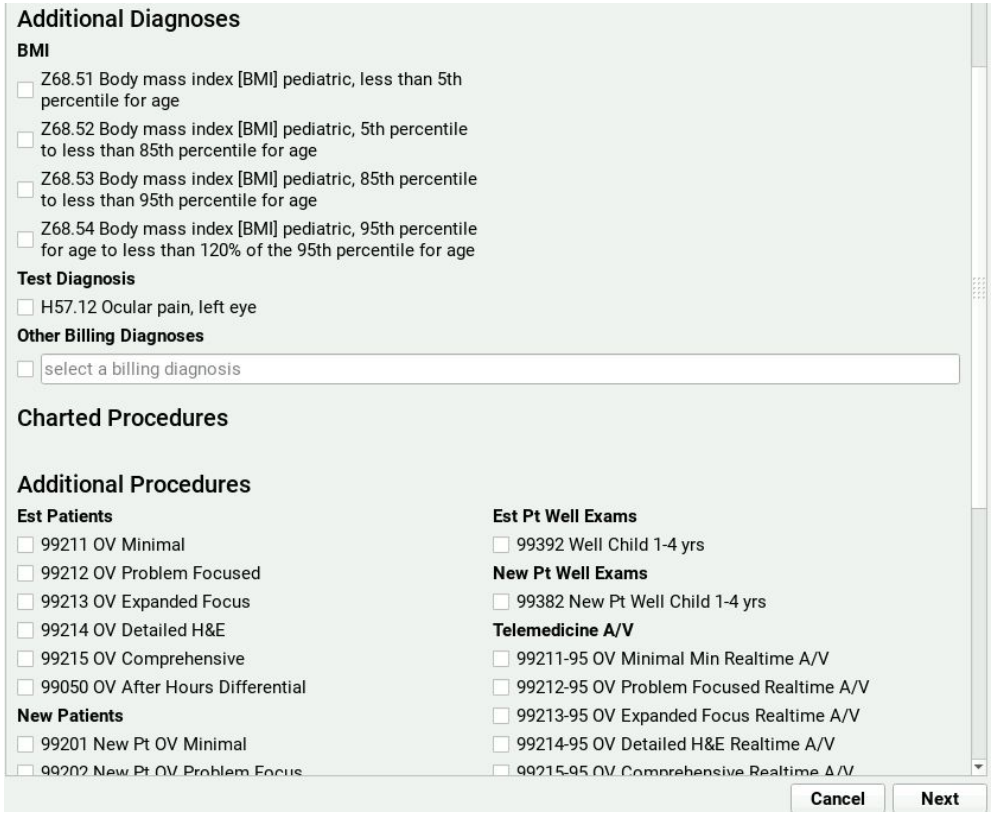

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Session Takeaways

1. You now have a better understanding of what the system can do to improve your workflow.
2. You can make these improvements in your own PCC system today.

Please complete the course survey in the UC App.

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Asking Questions:

Virtual attendees: Use the chat if you have a question that you want answered

In-person attendees: Go to the stationary microphone in your room.

CEUs:

You can request CEU codes for qualifying sessions using the form PCC shares out at the conclusion of the conference.

Do you have any questions?