



From Seed to Harvest: Start to Finish Billing in PCC EHR

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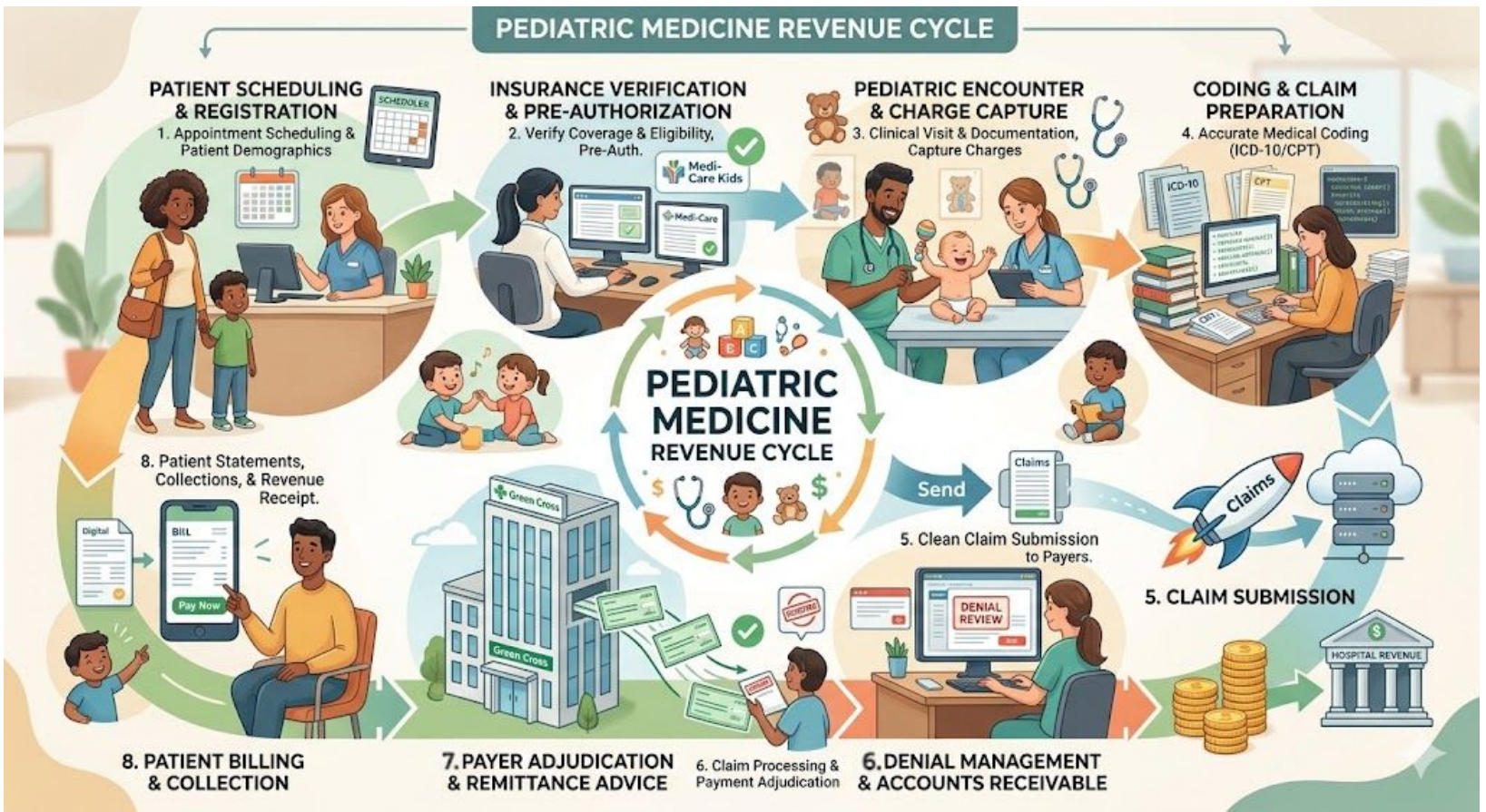




Session Objectives



- 1. Every pediatrician gets maximal payment for every service rendered with minimal administrative effort**
- 2. Revenue Cycle Management, everyone plays a part**
- 3. Tools, designed to save you time**





Part 1: The New Family: Account Structure

Account Demographics

Home Account Reassign Account

Wilma Flintstone (Account # 1981)

First Name: Wilma

Last Name: Flintstone

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

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 #:

Recent Financial History

Last Service:

Last Bill Sent:

Last Pers. Pmt:

Last Ins. Pmt:

Reassign Account Pebbles Flintstone 10 y

Selected account:
Bill Jones (Account #4065)

Assign as:

☒ Home Account (Current Home Account: Wilma Flintstone (Account # 1981))

☐ Billing Account (Current Billing Account: Fred Flintstone (Account # 1980))

☐ Home and Billing

Choose whether to use the new account for home, billing, or both

Reassign Account Pebbles Flintstone 10 years 3/16/07 F

Account Finder 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

Create Account Cancel Select



Part 1: The New Family: Account Structure



Billing Account Reassign Account

Don Smith (Account # 1467)

First Name:

Last Name:

Address

Phone

Home Phone:

Work Phone:

Cell Phone:

Emg Phone:

Email:

Billing Account's Portal User

Add

Billing Account Portal User

The Billing Account is "Don Smith"

Select the Billing Account's portal user:

Select an existing Patient Portal user to link to this account, or create a new user

Add a new portal user

Cancel Continue



Part 1: The New Family: Account Structure



Billing Account's Portal User

UnlinkManage

Name:	Angela Wilson (Guardian)	Last Login:	11/19/24 12:59pm
Sign In:	angwilson@example.com	Identity Verification:	Verified
Portal Notifications:	angwilson@example.com	Unread Messages:	0
Balances:	Angela Wilson (Account # 1421)	Unviewed Documents:	0

Pre-Check-In Recipient

Billing Account: Angela Wilson (Guardian)

Additional Recipient:

none

none

Daniel Wilson (Guardian) daniel@example.com

is, phone numbers, and email.

BackMy Kid's Chart

Pre-Check-In for Kellyn
Appointment: Thursday 09/14/23 10:45am
ADD Initial
Leonard McCoy, MD
Burlington Peds - Old North End

Insurance ...Editing

Insurance: BCBS \$30 OV&WC-other
Subscriber: Mark Wilson
Certificate: SBR186667814
Group: WIL427
Start Date: 12/22/20

Status
☒ Active (This is still the patient's insurance.)
☐ Expired (This is not the patient's insurance.)

Card Images
Attach a photo of the FRONT of the insurance card.

PCCHash home

Mark Wilson

SBR186667814

WIL427

12/22/20

After selecting and attaching an image, it appears under Card Images

Attach a photo of the BACK of the insurance card.

Attach a Photo or PDF

Save

My Kid's Chart

Thank you for submitting Pre-Check-In!

Personal Balance as of 04/30/24

Daniel Wilson	\$15.00
Kellyn Wilson (Dr. Williams, New NE)	
02/24/24	OV Comprehensive
Total Charge	\$160.00
Payments/Adjustments	-\$0.00
Pending Insurance	-\$145.00
Personal Balance	\$15.00
Total Personal Balance	\$15.00

This is not a bill and may not reflect the entire account balance.

Make a Payment

Pay at the Office

Click "Make a Payment" to open the payment screen

Click "Pay at the Office" to return to the Patient Portal home screen

BackMy Kid's Chart

Pre-Check-In for Kellyn
Appointment: Thursday 09/14/23 10:45am
ADD Initial
Leonard McCoy, MD
Burlington Peds - Old North End

Patient Information Confirmed

Billing Account Not Confirmed

Billing Account: Daniel Wilson

Address: RD 7 Box 006
Saxtons River, VT 05154

Home Phone: (802) 555-0183
Work Phone: (802) 555-0109
Cell Phone: (802) 555-0194
Emg Phone: (802) 555-0104
Email: *Information requested*

Edit

Confirm



Part 1: The New Family: Multi-Patient Family



PCC EHR

Pebbles Flintstone x Dino Flintstone x

Medical Summary **Dino Flintstone 4 yr**

Siblings

Open Chart BamBam Flinstone 5 yrs, 2 mos 02/02/07 F

Open Chart Pebbles Flintstone 10 years 03/15/02 F

Reminders No Saved Notes

Jeffrey Addington Account #1238 730 Grandview Drive

Jeffrey Addington Home Phone: 802-555-0191
730 Grandview Drive Work Phone: 802-555-0145
Saint Albans Bay, VT 05481 Cell Phone: 802-555-0179
Emg Phone: 802-555-0152

Dependents

- Abigail Addington (Home and Billing) **Chronic, Burlington Pediatrics Records**
- Michael Addington (Home and Billing)
- Nathaniel Addington (Home and Billing)

Appointment Book

Provider: Leonard McCoy, MD Today

Location: Lake Champlain Pediatr... Week of Monday, 08/17/20

Schedule Appointment Add Block

Multiple Appointments Edit

- 15 min Anthony Smith 10y 6/02/10 M
- 15 min Kathle...mith V 16y 2m 4/08/04 F
- 15 min Cole ...Smith 13y 5m 12/28/06 M

Leonard McCoy, MD

L Lake Champlain Pediatrics All Locations

08/18/20 9:45am Tuesday

Telemedicine add Patient Link

Clear Open Chart Details Save

When all appointments fit in the schedule, the border around the group is black

	Monday 08/17/20	Tuesday 08/18/20	Wed 08/19/20
9:15 am			
9:30 am		Nolan Long Immunizations Only	
10:00 am		Anthony Smith Sick Call	
10:15 am		Kathleen Smith V Sick Call	
		Cole Smith Sick Call	



Part 1: The New Family: Split Families

Posting

History (Wilma Flintstone)

History (Fred Flintstone)

Payment History

Search Filter:

Fred Flintstone (Account # 1980)

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	119.29	Ins Pmt - Aetna HMO	414141414		0.00
	40.71	Ins Adj - Aetna HMO			0.00
119.29 Ins Pmt - Aetna HMO Applied to:					
06/29/22	85.36	Dino Flintstone 99392	Well Child 1-4 yrs	Elizabeth Mary Casey, MD	
06/29/22	10.00	Dino Flintstone 99173	Vision Screen	Elizabeth Mary Casey, MD	
06/29/22	10.00	Dino Flintstone 92551	Hearing Screen	Elizabeth Mary Casey, MD	
06/29/22	13.93	Dino Flintstone 90658	Influenza Vac 36m + older	Elizabeth Mary Casey, MD	
40.71 Ins Adj - Aetna HMO Applied to:					
06/29/22	39.64	Dino Flintstone 99392	Well Child 1-4 yrs	Elizabeth Mary Casey, MD	
06/29/22	1.07	Dino Flintstone 90658	Influenza Vac 36m + older	Elizabeth Mary Casey, MD	
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

Print Receipt

Refund Credits

Reverse Payment

Edit

Close

Print Receipt Refund Credits Reverse Payment Edit Close





Part 1: The New Family: Forms

File Edit Reports Tools Configuration Window Help

PCC EHR

Find

Dino Flintstone PCC# 3335

Medical Summary

- Outstanding Tasks
- Recent and Upcoming Appts
- Appointment History
- Siblings
- Patient Forms
- Account Forms**
- Reminders
- Next Visit
- Problem List
- Allergies
- PCC eRx Allergies
- Medication History
- Family Medical History
- Medical History
- Confidential Notes
- Care Plan
- Social History
- Gender Identity
- Sexual Orientation
- Family History

Demographics

History

Billing

Medical Summary

Account Forms

select a form

- Termination Letter
- 10 Days Until Collections
- 60 Day Letter
- Long Overdue Letter
- Credit Refund
- Divorce Letter
- 30 Day Letter
- IRS Letter
- Credit Card Authorization**
- Payment Plan

Document Viewer

Wilma & Fred Flintstone Account #1981 15 Quarry Lane

Tags

- Title
- Credit Card Authorization
- Category
- Forms
- Correspondence/Consults
- Demographics
- Forms
- General
- Hospital
- Insurance/Billing**
- Lab
- Patient Education
- Portal Message Attachments
- Radiology

Wilma & Fred Flintstone
15 Quarry Lane

Winooski VT 05404

Dear Wilma & Fred ;

This is to authorize PCC Pediatric Test Associates to charge my credit card for medical services for either and/or all of my children in the event that my nanny or other caregiver brings the children in and I am unable to deliver a personal check at the time of their visit for treatment. This authorization is good until otherwise revoked by myself.

Credit Card Number: _____

Expiration Date: _____

Billing Name: _____

Signature of Record: _____

Page 1 of 1

credit_card_authorization.pdf 06/15/26 12:13pm

Rotate Page Rotate Document Fit Width Zoom to Fit

Print Discard Save





Part 1: The New Family: Saved Documents

Click the arrow to view Recent Documents or documents in a specific category

Abigail Addington PCC# 2503

Medical Summary

Demographics

History

Visit History

Immunization History

Flowsheets

Growth Charts

Documents

Billing

PCC eRx

Message: 08/28/25

Portal Message

Documents

Abigail Addington 9 yrs, 11 mos 09/09/15 F

Patient

Account: Harriett Hoffman (Home)

Account: Jeffrey Addington (Billing)

▶ Recent Documents (5)

▶ Correspondence/Consults (2)

▶ Forms (1)

▼ Patient Education (2)

Title: Type 2 Diabetes: Tips for Healthy Living

Category: Patient Education

Attached to: 04/14/25 - 9 Yr Well - TLC

Portal Messages: 08/28/25 - Tips for Type 2 Diabetes

Portal: Available in Portal Documents

Last Modified: abeagley 08/28/25 4:42pm

Date: 04/14/25

Pages: 4

Title: Resilience: Helping Your Children Rise Above the Challenges of Life

Category: Patient Education

Note (Internal): This is an internal note [abeagley]

Portal: Available in Portal Documents

Signed: Althea Beagley 08/28/25 4:44pm

Last Modified: abeagley 08/28/25 4:49pm

Pages: 4

Click a tab to see patient or account documents



Part 1: The New Family: A Knowledgeable Arrival

▼ Pre-Check-In

✓ Imported by Zelda Zen, LNA 09/14/23 3:00pm

Patient Demographics	Before Import	Pre-Check Information
Name	Jeremy Wilson	Jeremy Wilson
Nickname		
Date of Birth	05/15/10	05/15/10
Sex	Male	Male
Race		✓ White
Ethnicity		✓ Prefers not to answer
Pref. Language		✓ English

Account Demographics	Before Import	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
Emg Phone	802-555-0104	802-555-0104
Email		✓ daniel@example.com

New Insurance Policy	Before Import	Pre-Check Information
Insurance		✓ PCC Health Insurance, <i>Image</i>

Pre-Check information submitted by Daniel Wilson 09/14/23 2:58pm

PCC EHR

FIND

Schedule (11) Visit Tasks (99+) E-lab Results (40)

Wed 01/17/24

Visit Status	Room	Tasks	Arrival	Time	Last	First
Scheduled				8:00am	James D.D.S.	Heather "Cole" Danielle
Scheduled				8:00am	Lescavage	Alison Lee
Scheduled				8:00am	Wilson	Jose M.
Scheduled				8:00am	Peller	Erin Marie
Scheduled				8:15am	Guidarelli Sr.	Christophe "Ty" Lee
Scheduled				8:15am	Wilson	Andrew
Scheduled				8:30am	Denicholas II.	Caitlyn "Lee" Leigh
Scheduled				8:30am	Wilson	Kellyn
Scheduled				8:45am	Jones	Cindy

Account Notes

Amy 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.

10/27/22 MPB Michael S. Markoff, M.D.

A followup note about this topic. A followup note about this topic.

► 2019 (1 Thread)

Diagnoses

select diagnosis

Policies

Edit Policy Add Policy Display: Active

Insurance	Copay	Certificate	Group	Start	End	Status
1. BCBS \$30 OV&WC-oth...	\$30.00	SBR103385379001	Wil427	12/21/20		Active



Part 2: The Pre-Visit: Chadis

Questionnaires for Kent Zang

Click to open the questionnaire and begin filling it out

Goals for Change

New

Assigned on October 8, 2024 by System API

Childhood Sleep Q

New

Assigned on October 8, 2024 by System API

Family Cardiac His

New

Assigned on October 8, 2024 by System API

15-17 Yr Well - TLC

Shawn Lane 16 yrs, 9 mos 8/16/04

Screening

Order Vision Screen

Order Hearing Screen

EDITING

DETAILS?

Visit Priorities Ordered

Result: enter result notes

CHADIS Result: Visit Priorities

Respondent: Daniel Lane (other-primary-caregiver:) 05/19/21

- Parent Concern: Growth
- Parent Concern: Headaches: Possible migraines?
- Parent Concern: Sleep: Sleeps only four or five hours a night.

☐ Signature Required ☐ Refused ☐ Contraindicated ☐ Canceled

☒ Include on Patient Reports

Tasks: 1 (0 Completed)

Task Complete Task To: select a user

Note: enter task notes here

☐ Task Completed At: mm/dd/yy 12:00am By: select a user

ADD TASK DISCARD CHANGES SAVE ORDER

CHADIS Result Details

Shawn Lane 16 yrs, 9 mos 8/16/04 F

Daniel Lane (other-primary-caregiver:)

Patient: Shawn Lane, 08/16/04 F

Respondent: Daniel Lane (other-primary-caregiver:)

Encounter Date: 05/19/21

Order Date: 05/18/21

Questionnaires

- Visit Priorities

Questionnaire: Visit Priorities

Assigned: 05/18/21 12:35pm

Resulted: 05/19/21 2:54pm

Questionnaire Results:

- Parent Concern: Growth
- Parent Concern: Headaches: Possible migraines?
- Parent Concern: Sleep: Sleeps only four or five hours a night.

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Question	Response
What do you most want to discuss at the upcoming visit? Please check the most important one or two topics. If you wish, you may add a brief comment next to each item you choose (the text box will allow you to type up to 255 characters).	Growth Headaches(Possible migraines?) Sleep(Sleeps only four or five hours a night.)





Part 2: The Pre-Visit: Appointment Reminders

What Do Notification Messages Sound or Look Like?

Phone Calls

Here are the voice messages for various notification types. These messages are created by TeleVox and are not customizable.

Appointment Reminder w/ Clinician's Name	Hello. This is the office of Dr. James Smith at Pediatric Associates calling to remind Johnny of an appointment at 9:00am on May 15th, 2012.
Appointment Reminder w/o Clinician's Name	Hello. This is Pediatric Associates calling to remind Johnny of an appointment at 9:00am on May 15th, 2012.
Due For a Visit Notification w/ Recall Reason	Hello, this is Pediatric Associates calling with a reminder that Johnny is due for a <recall reason>. Please call us at 802-846-8177 or 800-722-7708 to schedule an appointment. We look forward to hearing from you soon
Due For a Visit Notification w/o Recall Reason	Hello, this is Pediatric Associates calling with a reminder that Johnny is due for a visit. Please call us at 802-846-8177 or 800-722-7708 to schedule an appointment. We look forward to hearing from you soon
Account Balance Notification	Hello this is Pediatric Associates calling. Our records indicate that your account is more than 60 days overdue. Please call our office at 802-846-8177 or 800-722-7708 to arrange payment today. Thank you!

Responding to a Phone Reminder: If a person answers the phone and hears the message live, they will have an opportunity to press numbers to confirm the appointment, repeat the message, or cancel the appointment. If an answering machine or voicemail answers the phone, an additional message will play instead: "If you need to cancel or reschedule this appointment, please call us during normal business hours at 802-846-8177 or 800-722-7708."





Part 2: The Pre-Visit: Pre-Checkin



▼ 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			☒ White
Ethnicity			☒ Prefers not to answer
Pref. Language			☒ English

Information submitted during pre-check-in appears in orange

Checked items will be imported to the patient's record

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		194
	802-555-0104		104

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

Insurance		Current	Pre-Check Information
Insurance	BCBS \$30 OV&WC-other		BCBS \$30 OV&WC-other
Status	Active		Active
Card Image			☒ View Image

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

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

PCC EHR Schedule (11) Visit Tasks (99+) E-lab Results (40)

Find

Wed 01/17/24

Visit Status	Room	Tasks	Arrival	Time	Last	First
Scheduled				8:00am	James D.D.S.	Heather "Cole" Danielle
Scheduled				8:00am	Lescavage	Alison Lee
Scheduled				8:00am	Wilson	Jose M.
Scheduled				8:00am	Peller	Erin Marie
Scheduled				8:15am	Guidarelli Sr.	Christophe "Ty" Lee
Scheduled				8:15am	Wilson	Andrew
Scheduled				8:30am	Denicholas II.	Caitlyn "Lee" Leigh
Scheduled				8:30am	Wilson	Kellyn
Scheduled				8:45am	Jones	Cindy

Pre-Check-In has not been completed

Pre-Check-In has been completed but not yet imported

Pre-Check-In has been completed and imported



Part 2: The Pre-Visit: Insurance Eligibility



Insurance Eligibility ◀ Mon 10/01/18 ▶

Appointments: 300

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	Calso, 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: All Locations Coverage Status: All Statuses Insurance Group: All Insurance Groups Verification Status: All Statuses

Request Eligibility Close Open

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

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
MSO: 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



Part 2: The Pre-Visit: Huddle Sheet



Huddle Sheet

View today's appointments with relevant details to help plan for the day.

Appointment Date: From 01/17/2025 to 01/17/2025
Appointment Status: Scheduled, Arrived
Appointments / Blocks: Appointments Only

Columns: 7 Displayed

Group By: None

Search Filter:

:: Appointment Date ▲	:: Appointment Time ▲	:: Patient Name	:: Appointment Reason	:: Appointment Provider	:: Patient Primary Insurance Group	:: Outstanding Personal Balance
01/17/2025	9:45am	Moeller, Shannon	15mo Well Visit	Elizabeth Mary Casey, MD	Health America	\$25.00
01/17/2025	2:45pm	Bennett, Karis Jean	4mo Well Visit	Kathleen W. Gomez, M.D.	Highmark Blue Shield	\$0.00
01/17/2025	5:15pm	Stinson, Valerie	Asthma Recheck	Kathleen W. Gomez, M.D.	Health America	\$76.00
01/17/2025	5:15pm	Pawling, Nathaniel	15mo Well Visit	Mark Williams, M.D.	Health America	\$0.00
01/17/2025	5:30pm	Naftzinger, Hunter M	15mo Well Visit	Kathleen W. Gomez, M.D.	Health America	\$76.00



Part 2: The Pre-Visit: Contacting Families

PCC EHR

Schedule (4) Visit Tasks (3) E-lab Results (3) Rx Queue (0) Messaging (40) Signing (35)

Wed 05/13/20 Appointments: 4

Visit Status	Room	Tasks	Arrival	Time	Last	First	DOB/Sex	Age	Visit Reason	Provider	Billing Status	Si
w/Nurse	2	END VISIT	9:58am	8:30am	Jetson	Judy	03/24/09 F	11y 1m	10yr - 11yr Well Visit	Gomez		
Arrived	-	END VISIT	9:58am	9:30am	Addington	Alice	02/09/18 F	2y 3m	3yr Well Visit	Gomez		
Scheduled				10:00am	LaPine	Allison	02/17/20 F	2m 3w	2mo Well Visit	Gomez		
Scheduled				3:00pm	F							

Visit Status: All Visit Statuses Location: Loca

Billing Status: All Billing Provider: Provi

Send Text

Select a patient and then click "Send Text"

Communication Preferences

Patient's Confidential Communication Preference

Contact Name: Wilma Flinstone

Method:

☐ Cell Phone ☐ Work Phone ☐ Home Phone

☒ Text 802-555-1212

☐ Email ilikeleopardprint@gmail.com

☐ Mailing Address address 1

address 2

city state zip code

☐ No Preference

Immunization Registry Communication Preferences

Share with Registry: ☒ Undetermined ☐ Yes ☐ No

Preferred Contact Method for the Immunization Registry: Undetermined





Part 3: Entering the Practice: Check-in

PCC EHR
FIND

Peter Potter PCC# 2569
History
Check-In: 05/16/26
Patient Check-In

Appointment Details
Patient Forms
Account Notes
Patient Demographics
Account Demographics
Patient Portal Users
Personal Contacts
Policies
Insurance Eligibility
Account Balances
Time of Service Payments
Credit Card On File
Communication Preferences
Encounter Billing Notes

Patient Check-In
Visit Status: Scheduled
Appt Time: 5/16/26 10:30am
Arrival Time: **Not Yet Arrived**
Visit Reason: Allergy Injection
Patient Age: 5 yrs, 1 mo
Appt Location: Burlington Peds - Flu Clinic
Appt Provider: Office
Appt Note:
Patient Forms
select a form
Account Notes
Tammy Ton (Account # 26)
New Note
Patient Demographics
Peter D. Potter
First Name: Peter
Nickname:
Middle Name: D.
Last Name: Potter
Suffix:
Date of Birth: 03/18/21
Sex: Male
Previous Next

The Patient Check-In protocol works like other protocols in PCC EHR

Peter D. Potter 5 yrs, 1 mo 03/18/21 M
Reprint Visit Forms

Check-In: 05/13/26
Patient Check-In
Appointment Details
Patient Pre-Check-In
Patient Forms
Account Notes
Patient Demographics
Account Demographics
Pre-Check-In Recipient
Patient Portal Users
Personal Contacts
Policies

Navigate to a component to update patient information

Pref. Language: English
Account Demographics
Account # 336)
Reassign Account
Last Name: Wilson
Address
20 Winooski Falls Way
address 2
Winooski VT 05154

Account Information
Account Flags:
EMG Contact:
EMG Phone #:
Alt Last Name:
Mother Employer:
Father Employer:
Pharmacy #:

Use anchor buttons or "Next" and "Previous" to review and update patient information

Cancel Save Save + Check In



Part 3: Entering the Practice: Check-in



Documents Abigail Addington 9 yrs, 11 mos 09/09/15 F

Patient Account: Harriett Hoffman (Home) Account: Jeffrey Addington (Billing)

▼ **Recent Documents (5)**

Title: Resilience: Helping Your Children Rise Above the Challenges of Life
Category: Patient Education
Note (Internal): [Image]
Portal: [Image]
Signed: [Image]
Last Modified: [Image]

Title: [Image]
Category: Forms
Last Modified: abeagley 08/28/25 4:48pm

Title: Growing Children Handout
Category: Correspondence/Consults
Last Modified: abeagley 08/28/25 4:48pm

Title: Type 2 Diabetes: Tips for Healthy Living
Category: Patient Education
Attached to: 04/14/25 - 9 Yr Well - TLC
Portal Messages: 08/28/25 - Tips for Type 2 Diabetes
Portal: Available in Portal Documents
Last Modified: abeagley 08/28/25 4:42pm

Title: Tx notes from paper
Category: Correspondence/Consults
Attached to: 08/28/25
Last Modified: abeagley 08/28/25 4:40pm

► Correspondence/Consults (2)
► Forms (1)
► Patient Education (2)

The Recent Documents list, which shows the 5 most recent documents in a patient's chart, appears above other document categories

Patient Portal Users

Name:	Daniel Wilson	Last Login:	05/12/26 12:04pm	Manage
Sign In:	daniel@example.com	Identity Verification:	Verified	
Portal Notifications:	daniel@pcc.com	Unread Messages:	1	
Balances:	Personal balances not displayed	Unviewed Documents:	0	
Name:	Laura Wilson	Last Login:	never	Manage
Sign In:	lwils@example.com	Identity Verification:	never	
Portal Notifications:	lwils@example.com	Temporary Password:	KkZqQKaG	
Balances:	Personal balances not displayed	Unread Messages:	0	
		Unviewed Documents:	0	

Review portal users who have access to this patient



Part 3: Entering the Practice: Check-in

Document Viewer | Abigail Addington | 9 yrs, 11 mos

1.14.48

myCIGNA.com
Connecticut General Life Insurance Co.
Choice Fund PPO
Hospital ER 5%
Urgent Care 5%
Rx \$10/20/50
Network Coinsurance In 85%/5%
Out 75%/25%

Page 1 of 1

0001S120090629_1243180039.jpg 04/02/26 11:21am

Rotate Page Rotate Document Fit Width Zoom to Fit

Add to Portal Message Print Sign Edit Close

Insurance Eligibility
Appt: Allergy Injection 05/16/26 10:30am Office
PCP: None
Eligibility Notes:

Aetna HDHP
Copoly: \$15.00 Cert: 34DFJH Group: Subscriber:
Status: Validated 05/12/26 [Joan]
Eligibility Response: 07/12/18 Active
► Summary Report
► Full Report

Request Eligibility

Click the disclosure arrows to expand either report

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



Part 3: Entering the Practice: Check-in

Account Balances Print

Daniel Wilson (Account # 336)

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	335.00	0.00	335.00
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

Dana Wilson (PCC# 2134) James Davidson, Jr. M.D. Winooski Pediatrics

Date	Description	Charge	Payment/Adj	Insurance Due	Medicaid Due	Personal Due
09/04/25	Well Child Under 1 yr	90.00		0.00		60.00
09/04/25	Visa Card Payment		30.00			
09/04/25	DTaP	45.00		0.00		45.00
09/04/25	1 Immuniz Admin W/O MD Counseling	10.00		0.00		10.00
09/04/25	Hib Vaccine	50.00		0.00		50.00
09/04/25	2+ Immuniz Admin W/O MD Counseling	30.00		0.00		30.00
09/04/25	IPV	50.00		0.00		50.00
09/04/25	Pneumo-7	90.00		0.00		90.00
		365.00	30.00	0.00	0.00	335.00

Enter payment information

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
			-20.00 Unsavd Payments
			0.00 Expected Balance

Payment Type: Visa Card Payment Amount: 20.00 Check #: Provider: Mark Williams, M.D.

Save Payment Print Receipt

Payment amount and new expected balance appear as you type

Credit Card On File

Credit Card On File - Add

Card number: *****1234

Expiration Date: 03 2027

Name on card: Alice A Addington

Card Nickname: Mom Visa

☒ Preferred

Cancel Save



Part 4: During the Visit: Configuration & Orders



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
Immunization	MMR	[x] Z23 Encounter for immunization	[x] 90707 MMR Vaccine
Immunization	MMRV	[x] Z23 Encounter for immunization	[x] 90710 MMRV Vaccine

Double-click to edit the billing codes for an order

Review current diagnosis and procedure billing codes for the order

Search for an order

Immunization Orders

MMR

Varicella

select an immunization

Bill - Diagnoses and Procedures

Hope Quarry 10 yrs, 2 mos 2/11/11 F

Date of Service: 04/21/21

Provider of Service: Beverly Crusher, MD

Charted Diagnoses

MMR

- ✓ Z23 Encounter for immunization
- Ear Piercing - Both Ears
- ✓ Z41.3 Encounter for ear piercing

Additional Diagnoses

Other Billing Diagnoses

☐ select a billing diagnosis

Charted Procedures

MMR

- ✓ 90707 MMR Vaccine
- Ear Piercing - Both Ears
- ✓ 69090 Ear Piercing

Additional Procedures

Est Patients

- ☐ 99211 OV Minimal
- ☐ 99212 OV Problem Focused
- ☐ 99213 OV Expanded Focus
- ☐ 99214 OV Detailed H&E
- ☐ 99215 OV Comprehensive

Est Pt Well Exams

- ☐ 99391 Well Child Under 1 yr
- ☐ 99392 Well Child 1-4 yrs
- ☐ 99393 Well Child 5-11 yrs
- ☐ 99394 Well Child 12-17 yrs
- ☐ 99395 Well Child 18-39 yrs

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



Part 4: During the Visit: EEF (Superbill) Defaults



Order Mapping

Diagnosis Mapping

Default Procedures

Default Diagnoses

Add Procedures

enter section header

Add

Arrange Procedures

Est Patients

99211 OV Minimal

99212 OV Problem Focused

99213 OV Expanded Focus

99214 OV Detailed H&E

99215 OV Comprehensive

99050 OV After Hours Differential

New Patients

99201 New Pt OV Minimal

99202 New Pt OV Problem Focus

99203 New Pt OV Expanded Focused

99204 New Pt OV Detailed H&E

99205 New Pt OV Highly Comprehensive

Est Pt Well Exams

Well Child (age auto-calculated)

New Pt Well Exams

New Pt Well Child (age auto-calculated)

Allergy Office Codes

99243 Consult Limited

99244 Consult Intermediate

99245 Consult Comprehensive

Extended Visit Codes

99354 OV Prolonged Service

Hospital Consults

99232 IH Subs Care Expanded Focus

99254 IH Initial Comp Consult

Delete

Preview

Cancel

Save

Save + Exit

Arrange Procedures

Est Patients

99211 OV Minimal

99212 OV Problem Focused

99213 OV Expanded Focus

99214 OV Detailed H&E

99215 OV Comprehensive

99050 OV After Hours Differential

New Patients

99201 New Pt OV Minimal

99202 New Pt OV Problem Focus

99203 New Pt OV Expanded Focused

99204 New Pt OV Detailed H&E

99205 New Pt OV Highly Comprehensive

99050 OV After Hours Differential

Est Pt Well Exams

Well Child (age auto-calculated)

New Pt Well Exams

New Pt Well Child (age auto-calculated)

Allergy Office Codes

99243 Consult Limited

99244 Consult Intermediate

99245 Consult Comprehensive

Extended Visit Codes

99354 OV Prolonged Service

Hospital Consults

99232 IH Subs Care Expanded Focus

99254 IH Initial Comp Consult



Part 4: During the Visit: Pay for Performance

Protocol 7-8 Yr Well - Screening Orders

Anchor ☒ Yes **Anchor Text** Screening Orders

☐ No

Filter Provider

Drag and drop items to rearrange.

Items
Hearing Screen
Vision Screen
Nutrition Counseling
Recommendation to Exercise

Edit **Nutrition Counseling** Ordered

SNOMED CT: Nutrition education

▼ Tasks: 1 (0 Completed)

➔ Task: Complete Task

Order Recommendation to Exercise

Screening

Order Vision Screen Snellen

Order Hearing Screen

Order CRAFFT

Order PHQ-2

Order TB questionnaire

Order Tobacco Exposure/ use screening

Order PHQ-9

Smoking Status (ARRA)

select smoking status

- Never Smoker**
- Current Every Day Smoker
- Current Some Day Smoker
- Former Smoker
- Heavy tobacco smoker
- Light tobacco smoker
- Smoker, Current Status Unknown
- Unknown If Ever Smoked

Procedures		Units
☒ 1033F Tobacco non-user and no exp to secondhand smoke		1
▼ Dx: 1) ☒ Z00.129 Encounter for routine child health examination without abnormal findings		
☒ 1032F Tobacco user and/or exp to secondhand smoke		1
▼ Dx: 1) ☒ Z00.129 Encounter for routine child health examination without abnormal findings		



Part 4: During the Visit: Medical Decision Making Based E&M Coding

2021 Evaluation and Management

2021 MEDICAL DECISION MAKING

2021 Problems

Level 4 Problems

Select All

- ☐ 1 or more chronic illnesses w/exacerbation, progression, or side effects of treatment

notes

- ☐ 2 or more stable chronic illnesses

notes

- ☐ 1 undiagnosed new problem with uncertain prognosis

notes

- ☐ 1 acute illness with systemic symptoms

notes

- ☐ 1 acute complicated injury

notes

- ☐ add item

notes

Risk Level (Morbidity from diagnostics or treatment)

Select All

- ☐ Minimal

notes

- ☐ Low

notes

- ☐ Moderate

notes

- ☐ High

notes

- ☐ add item

notes

Visit Documents

Navigational Anchors in 2021 Evaluation and Management

1. 2021 MEDICAL DECISION MAKING
2. 2021 Problems
3. 2021 Data (Captured by history, orders, communication, etc)
4. 2021 Risk
5. 2021 TIME
6. Prescriptions



Part 4: During the Visit: Vaccinations

Forecasting Results Last updated: 10/20/23 04:01pm ☒ Show Informational Warnings(0) Refresh

Vaccine Family	Dose #	Recommended Date	Minimum Date	Past Due Date	Maximum Date
Flu	3rd	07/01/2023 (9y 9m)	07/01/2023	09/21/2133	09/21/2133
COVID-19	1st	10/20/2023 (10y)	10/20/2023	09/21/2133	09/21/2133
HPV	1st	09/21/2024 (11y)	09/21/2022	10/18/2026	09/21/2133
Hep-A	1st	09/21/2014 (1y)	09/21/2014	10/18/2015	09/21/2133
DTaP/DT/Td/Tdap	6th	09/21/2024 (11y)	09/21/2024	10/18/2026	09/21/2133
Meningococcal	1st	09/21/2024 (11y)	09/21/2024	10/18/2026	09/21/2133

Forecasting Warnings

Vaccine	Date
Hepatitis B 08	03/03/

Billing Configuration

Order Mapping **Diagnosis Mapping** Default Procedures ICD-10 Default Diagnoses

Order Mapping - Edit

Order Type: **Immunization**
Order Name: **COVID-19 (Pfizer 5-11)**

ICD-10 Billing Diagnoses

Z23 Encounter for immunization ☒ Preselect on Billing Screen

CPT Billing Procedures

91307 COVID-19 (Pfizer 5-11) ☒ Preselect on Billing Screen

0071A Imms Admin (COVID-19, PFR, 5-11, 1st) ☐ Preselect on Billing Screen

0072A Imms Admin (COVID-19, PFR, 5-11, 2nd) ☐ Preselect on Billing Screen

You can add the specific administration codes for each dose so the clinician can select one at the time of service



Part 4: During the Visit: Completeness of Documentation

- After-Hours Codes (99050-99060)
- Alcohol/Substance Abuse Counseling (99408-99409)
- Burn Treatment Codes (16000, 16020, 17250, 30901)
- Complex Chronic Care Management (99487-99489)
- Circumcision Codes (54150-54162)
- Developmental Screening and Testing Codes (96110-96119, 96160-96161, 96127)
- Foreign Body Removal Codes (30300-30320, 69200, 10120, 10060, 65205)
- Laceration Care Codes (11040-11049, 12001-13160)
- Medical Nutrition Therapy (97802-97804)
- Office Consultation Codes (99241-99245)
- Orthopedic Codes (20100-29999)
- Preventive Medicine Counseling (99401-99404, 99411-99412)
- Smoking and Tobacco Counseling (99406-99407)
- Telephone Care Codes (99441-99444)
- Vision/Hearing Screening Codes (99173, 99174, 99177, 92582-92588, 92550-92559)
- Wart/Lesion Removal Codes (17000-17009, 17110-17111)



BIOFIRE® SPOTFIRE®

Test Name	Analyte	CPT® Code	Description	Medicare Coverage and Rules	National CLFS Fee Schedule ¹	VERMONT Medicaid Fee Schedule ²
BIOFIRE® SPOTFIRE® Respiratory (R) Panel Mini	SARS-CoV-2 Human rhinovirus/enterovirus Influenza A virus (2 Markers) Influenza B virus Respiratory syncytial virus	87631	Infectious agent detection by nucleic acid (DNA or RNA); respiratory virus (eg, adenovirus, influenza virus, coronavirus, metapneumovirus, parainfluenza virus, respiratory syncytial virus, rhinovirus), includes multiplex reverse transcription, when performed, and multiplex amplified probe technique, multiple types or subtypes, 3-5 targets	Active-A58741 CCI MUE	\$142.63	\$139.06



Part 5: After the Visit: Checkout

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

Schedule (17) Visit Tasks (1) E-lab Results (40) Messaging (0) Signing (99+)

FIND

Completed	Date	Due	Patient	Visit Status (Rm.)	Provider	Order	Task	To
	06/16/26 12:33pm	06/16/26	Flintstone, Dino	Arrived	Crusher	5 year well visit	Complete Task	Front Desk

Followup

EDITING

5 year well visit Ordered

Result: enter result notes

☐ Signature Required

☒ Include on Patient Reports

Tasks: 1 (0 Completed)

Task Complete Task To Front Desk Due 06/16/26

Note: enter task notes here

☐ Task Completed At mm/dd/yy 12:00am By select a user

ADD TASK

DISCARD CHANGES SAVE ORDER

PCC Pediatric Test Associates

20 Winoski Falls Way, Suite 7

Winoski, VT 05404-2228

(800) 722-7708

Billing Account

Fred Flintstone

1400 Rock Road

Winoski, VT 05404

Payments

Date	Payment	Amount
07/14/21	Personal Check Payment 12345	(140.00)
	Applied to:	7.00 06/29/20 Pebbles Well Child 5-11 yrs
		10.00 06/29/20 Pebbles Vision Screen
		10.00 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





Part 5: After the Visit: Post Charges

DOB/Sex	Age	Visit Reason	Provider	Billing Status	Signed	Primary Insurance
04/15/22 F	4y	4yr Well Visit	Williams	Ready To Post		Blue Shield
06/23/08 F	17y 10m	17yr Well Visit	Williams			HealthyKids HMO
08/10/10 F	6y 8m	Asthma Recheck	Williams			Blue Shield

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

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 as of 01/14/20

Capital Blue Cross \$10 OV&WC-Other

Copy: \$10.00 Cert: YWP57782605403 Group: A

Status: Validated

Eligibility Response: This insurance policy is not active for this patient.

Policies

Insurance

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

Account Balances

Jeffrey Addington (Account # 1238)

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

Personal 0.00 0.00 0.00

Post Charges

Abigail Addington PCC# 2503

History

Post Charges: 01/14/20

Patient Details

Post Charges

Appointment Details

Diagnoses

Procedures

Claim Information

Payments

Receipts

Diagnoses

Include Dx on Claim	ICD-10	Description	Linked Procedures
☒	J02.0	Streptococcal pharyngitis SNOMED: Streptococcal sore throat	99213, 87880

select an ICD-10 diagnosis

Procedures

Primary: Capital Blue Cross

Procedures	Units	Price	Insurance	Ins Due	Ins Adj	Pers Due	Source
☒ 99213 OV Expanded Focus Dx: 1) J02.0	1	100.00	Primary	90.00	0.00	10.00	Electronic Encounter Form
☒ 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

Claim Information

Service Provider: Williams, M.D. PCP: Williams, M.D.

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

217.00 10.00 207.00

Add Payment

Personal due for this encounter

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

Payment posted during Patient Check-In



Part 5: After the Visit: Finding Older Visits



Encounters by Billing Status

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

Encounter Date: From 04/08/2026 to 05/08/2026
Billing Status: Ready to Post, New Items

Primary Insurances at Date of Service: BCBS \$15 Custom Blue QAC,QAF, BCBS \$20 Custom Blue QAC,QAF, BCBS \$25 Custom Blue QAC,QAF, BCBS \$5 Custom Blue QAC,QAF, BCBS Blue Chip QBD, Capital Blue Cross \$10 OV&WC-Other, Capital Blue Cross \$15 OV & Full WC - other, Capital Blue Cross \$15 OV&WC-Other, Capital Blue Cross \$20 OV&WC-Other, Capital Blue Cross \$25 OV&WC-Other, Direct Blue \$10 -ZAB, Direct Blue \$15 -ZAB, Direct Blue \$20 -ZAB, Highmark Classic Blue, Highmark Classic Blue \$10 OV, Full WC cov, Highmark Classic

Columns: 8 Displayed Group By: None Search Filter:

Encounter Date/Time	Patient Name	Primary Insurance at Date of Service	Encounter Reason	Provider	Location	Billing Status	Signed
04/17/2026 10:45AM	Whitney, Chad	Highmark PPO Blue \$20	3yr Well Visit	Elizabeth Mary Casey, MD	Lake	New Items	Dr. Casey
04/17/2026 10:45AM	Hoffman, Meghan	Capital Blue Cross \$10 OV&WC-Other	Asthma Recheck	Elizabeth Mary Casey, MD	Lake	Ready to Post	
04/13/2026 11:15AM	Everitt, Paul	Capital Blue Cross \$20 OV&WC-Other	Sick Call	Beverly Crusher, MD	Winooski	Ready	
04/13/2026 8:30AM	Achey, Diane "Anthony" Mae	Highmark Classic Blue	Sick Call	Beverly Crusher, MD	Winooski	Ready	

4 Results

Report Library Schedule Report Export Back Print

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

Report Library

Encounters by Billing Status

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

Encounter Date: From 05/18/2026 to 06/17/2026
Billing Status: Not Ready

Columns: 9 Displayed Group By: Provider Search Filter:

Encounter Date/Time	Patient Name	Primary Insurance at Date of Service	Encounter Type	Encounter Reason	Provider	Location	Billing Status	Signed
▼ Beverly Crusher, MD (43 results)								
05/27/2026 5:45PM	Jenson, Elroy		Visit	Sick Call	Beverly Crusher, MD	Winooski	Not Ready	Dr. Williams
06/03/2026 12:30PM	Jenson, Judy		Visit	2mo Well Visit	Beverly Crusher, MD	Winooski	Not Ready	Dr. Williams
06/03/2026 11:15AM	Jenson, Astro		Visit	4yr Well Visit	Beverly Crusher, MD	Winooski	Not Ready	
06/03/2026 4:15PM	Jenson, Elroy		Visit	12yr - 13yr Well Visit	Beverly Crusher, MD	Winooski	Not Ready	Dr. Williams
06/03/2026 3:02PM	Jetson, Astro	Keystone HealthPlan \$0/0 CHIP	Visit	15yr+ Well Visit	Beverly Crusher, MD	Winooski	Not Ready	
06/03/2026 9:30AM	Jetson, Judy	Keystone HealthPlan \$0/0 CHIP	Visit	10yr - 11yr Well Visit	Beverly Crusher, MD	Winooski	Not Ready	
06/10/2026 9:35AM	Meritt, Zachary		Visit	10yr - 11yr Well Visit	Beverly Crusher, MD	Winooski	Not Ready	
06/10/2026 1:32PM	Hudson, Walker		Visit	2mo Well Visit	Beverly Crusher, MD	Winooski	Not Ready	
06/10/2026 9:22AM	Smith, Baby		Visit	10yr - 11yr Well Visit	Beverly Crusher, MD	Winooski	Not Ready	
06/10/2026 1:32PM	Hudson, Francis		Visit	2mo Well Visit	Beverly Crusher, MD	Winooski	Not Ready	



Part 6: Revenue Cycle Leaves PCC: Claims Tool Configuration



Claim Holds

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

Claim Hold Details

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

Claim Hold Index

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

Click on a claim hold to see details above

Add Delete Edit Close

Claims - Delay

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

Delay all claims for: 2 days

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)

Close Save





Part 6: Revenue Cycle Leaves PCC: Preparing 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

Submission

Needs Correction (153)

Paper Claims (136)

Holds

Delay

Log

Paper Claims

Paper Claim Batch	Last Printed	Claims
BCBS Paper Claims	never	1
UHC Paper Claims	never	6
Other Paper Claims	never	129

Close

Print Claims

Electronic Claim Batches Prepared to Submit

Select All

Select None

Search Filters:

Select	Claim Batches	Prepared Claims
☐	PCC - Aetna	99
☐	PCC - Horizon BCBS	1046
☐	PCC - Horizon PPO	9
☐	PCC - Medicaid	1
☐	PCC - Qualcare	1
☐	PCC - Qualcare Availability	1
☐	PCC - UHC Community Plan	10
☐	PCC - UHCCP Flores	1

Cancel

Save

Submission

Needs Correction (9)

Log

Claims - Submission Session Log

Each claim submission session may include claims that were held, delayed, needed corrections, or routed to paper in addition to claims submitted to payors.

Year: 2024

Date	User	Held	Delayed	Needed Correction	Routed to Paper	Submitted	Batches
01/16/24 12:50pm	PCC PCC	0	1	9	0	1	1



Part 6: Revenue Cycle Leaves PCC: Needs Corrections



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.

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.

Cancel Delete Claim

Status: Needs Correction

Claim Status: Validated

All Statuses

Needs Correction: Hostettler, Amanda (PCC# 2482)

Needs: Flintstone, Pebbles (PCC# 3336)

Validate Delete Claim Close Open



Part 7: Insurance RCM: Claim Rejections



Insurance Balances

Claim Rejections

Unpaid Encounters

Claim Rejections

Claim rejections are responses from a clearinghouse or payor about claims they cannot accept. The claims need to be corrected and resubmitted so they can be accepted by the payor for adjudication.

Insurance Group	Claim Rejections	Amount
Aetna	62	\$28,039.00
American Partners	3	\$1,300.00
BCBS	23	\$9,505.00
Cigna	10	\$4,985.00
Horizon	1,986	\$767,588.00
Horizon Preferred	1	\$415.00
Medicaid	2	\$1,485.00
Other	4	\$2,590.00
Totals	613	\$1,142,504.00

Rejection Dates:

Last 90 Days

 From:

05/23/25

 To:

08/21/25

Work With All

Close

Select

Claim Rejections — View Details

Rejection Details
Rejection Date: 07/05/25
Claim ID: 4444444
Insurance: TRICARE East
Amount: \$270.00

Claim Rejection Change History
07/05/25 06:40am Rejection received from Payor

Encounter Details
Patient: Rodger Orlando (PCC# 303030)
Date of Birth: 04/01/19
Member ID: 0303030303
Service Date: 04/23/25 (120 Days Elapsed)
Insurance Due: \$251.00 (TRICARE East)
Personal Due: \$0.00

Encounter Billing Notes

New Note

Rejection Reason: MEMBER ID NOT FOUND OR FORMAT INVALID

Find: 303030 4444444 1 of 1

Patient Name: ORLANDO, RODGER
From Date: 20250423 To Date: 20250423
Patient Control Number: 303030 4444444 Charge: 270.00
Provider Billing ID: 1234567890 Clearinghouse Trace #: 303030 4444444

Payer Claim #: NA Availity Trace #: 999999999

Error Initiator: TRICARE EAST (PGBA) Message Type: R
Error Code: H65
Error Message: MEMBER ID NOT FOUND OR FORMAT INVALID
Version: 5010A1 Loop: NA
Segment ID: NA Element #: NA

Assigned To:

Rejection Status: ☒ Unresolved ☐ Resolved

Billing History

Edit Charges

Cancel

Save



Part 7: Insurance RCM: Unpaid Encounters

Insurance Balances

Claim Rejections

Unpaid Encounters

Unpaid Encounters

Unpaid encounters include charges pending on insurance payor. Aging categories are by transaction date, and amounts shown are the total charge amount pending insurance.

Insurance Group	Encounters	0-29 Days	30-59 Days	60-89 Days	90-120 Days	120+ Days	Amount %
Aetna HDHP	7	\$99.00	\$0.00	\$0.00	\$0.00	\$2,065.88	2.8%
Aetna MC & Elect	13	\$1,259.00	\$0.00	\$0.00	\$0.00	\$10.00	1.6%
Aetna Open	29	\$2,059.00	\$511.00	\$0.00	\$0.00	\$0.00	3.3%
Aetna USHC HMO	13	\$1,346.00	\$260.00	\$265.00	\$0.00	\$0.00	2.4%
BCBS	44	\$3,368.80	\$437.00	\$215.30	\$23.00	\$186.90	5.5%
Capital Blue Cross	176	\$10,325.00	\$3,744.00	\$1,898.00	\$130.00	\$336.51	21.2%
Cigna	8	\$393.00	\$0.00	\$0.00	\$0.00	\$27.00	0.5%
Geisenger Health Plan	11	\$1,105.00	\$83.00	\$229.00	\$0.00	\$0.00	1.8%
Totals	784	\$58,158.77	\$11,786.60	\$3,417.60	\$492.00	\$3,582.29	

Work With All

Close

Select



Part 7: Insurance RCM: Unpaid Encounters



Insurance Group	Encounters	0-29 Days	30-59 Days	60-89 Days	90-120 Days	120+ Days	Amount %
Aetna HDHP	7	\$99.00	\$0.00	\$0.00	\$0.00	\$2,065.88	2.8%
Aetna MC & Elect	13	\$1,259.00	\$0.00	\$0.00	\$0.00	\$1,170.00	1.6%
Aetna Open	29	\$2,059.00	\$511.00	\$0.00	\$0.00	\$0.00	3.3%

Unpaid Encounters — Aetna HDHP

Search Filter:

Service Date	Days Since Service Date	Patient	Insurance Plan	Provider	Place of Service	Amount
03/18/25	149	Flintstone, Dino	Aetna HDHP	James Davidson, Jr. M.D.	Winooski Pediatrics	\$64.00
03/18/25	149	Flintstone, Pebbles	Aetna HDHP	James Davidson, Jr. M.D.	Winooski Pediatrics	\$64.00
08/10/20	1,830	Orlando, Rodger Growth	Aetna HDHP	Alfred Woodward, M.D.	UVM Medical Center Inpatient	\$1,937.88

3 Encounters

Aging: 120+ Days

Place of Service: All Places of Service

Provider of Service: All Providers

Back

View Details



Part 7: Insurance RCM: Unpaid Encounters



Insurance Balances

Claim Rejections Unpaid Encounters

Unpaid Encounters – Health Assurance

Search Filter:

Service Date	Days Since Service Date	Patient	Insurance Plan	Provider	Place of Service	Amount	Encounter Status	Assigned User
08/23/25	74	Peters, Jeffrey	Health Assurance PPO \$15	Elizabeth Mary Casey, MD	Winooski Pediatrics	\$35.00	Waiting on Payor	Anita Sharp
09/12/25	54	Miller, Meagan William	Health Assurance CCPPPO \$15	Mark Williams, M.D.	Winooski Pediatrics	\$18.00	Waiting on Payor	Anita Sharp
09/26/25	40	Greenawalt, Megan Marilyn	Health Assurance Healthstyles \$10	Mark Williams, M.D.	Winooski Pediatrics	\$56.00	Waiting on Payor	Anita Sharp
09/29/25	37	Neidig, Mark L.	Health Assurance PPO \$15 Teamster	Kathleen W. Gomez, M.D.	Winooski Pediatrics	\$41.00	Waiting on Payor	Anita Sharp
10/04/25	32	Westervelt, Megan M	Health Assurance PPO \$15	Kathleen W. Gomez, M.D.	Winooski Pediatrics	\$41.00	Waiting on Payor	Anita Sharp

Insurance Balances

Claim Rejections Unpaid Encounters Status Configuration

Unpaid Encounters – Aetna HDHP

Search Filter:

Aging: All Place of Service: All Places of Service Provider of Service: All Providers

Encounter Status: Waiting on Payor

Service Date	Days Since Service Date	Patient	Insurance Plan	Provider	Place of Service	Amount	Encounter Status
10/28/25	147	Flintstone, Pebbles	Aetna HDHP	James Davidson, Jr. M.D.	Winooski Pediatrics	\$64.00	Important!
03/22/21	1,828	Orlando, Rodger Growth	Aetna HDHP	Alfred Woodward, M.D.	UVM Medical Center Inpatient	\$1,937.88	Important!

2 Encounters

Aging: All Place of Service: All Places of Service Provider of Service: All Providers

Encounter Status: Important! Assigned User: All Users

Back View Details



Part 7: Insurance RCM: Unpaid Encounters



Unpaid Encounters – View Details

Encounter Details

Patient: Rodger Growth Orlando (PCC# 4017)
Date of Service: 02/05/21 (1,837 Days Elapsed)
Insurances: Aetna HDHP, Personal
Provider of Service: Alfred Woodward, M.D.
Billing Provider: Alfred Woodward, M.D.
Place of Service: UVM Medical Center Inpatient

Balance Information

Insurance Due: \$1,937.88 (Aetna HDHP)
Personal Due: \$0.00

Encounter Billing Notes

New Note

02/16/26 Mark Williams, M.D.



A sample note about claim submission and a discussion with the payor and the family about this encounter's billing challenges.

02/16/26 Mark Williams, M.D.



Numerous extensive notes about our efforts to collect on this encounter.

Assigned To:

Unpaid Encounter Status:

Insurance Balances

Claim Rejections

Unpaid Encounters

Unpaid Encounters – View Details

Encounter Details

Patient: Jeffrey Peters (PCC# 1033)
Date of Service: 08/23/25 (79 Days Elapsed)
Insurances: Personal, Health Assurance PPO \$15
Provider of Service: Elizabeth Mary Casey, MD
Billing Provider: Elizabeth Mary Casey, MD
Place of Service: Winooski Pediatrics

Balance Information

Insurance Due: \$35.00(Health Assurance PPO \$15)
Personal Due: \$0.00

Encounter Billing Notes

New Note

11/10/25 Mark Williams, M.D.



Contacted payor and submitted appeal, reference 3333222111.

Under review
Waiting on PCC
Waiting on Family

Assigned To:

Encounter Status:



Part 7: Insurance RCM: Unpaid Encounters

Request Claim Status

Claim Status Response: BCBS 4444 333 Last update: 12/03/25 12:36pm

Payor

Payor ID: 87

Payor Name: UNITEDHEALTHCARE

Practice

Practice Name: AMAZING PEDIATRICS LLC

ETIN: 1

Service Provider

Provider Name: MONSTER COOKIE

NPI: 189

Subscriber

Subscriber Name: PERSON STRUDEL

Member ID: 74199

Subscriber Status

Trace Number: 63

Claim Status Category: F3N Finalized/Not Forwarded-The claim/encounter processing has been completed. Any applicable payment has been made. The claim/encounter has NOT been forwarded to any subsequent entity identified on the original claim.

Claim Status: 1

Response Date: 10/02/25

For more detailed information, see remittance advice.

Adjudication Information

Adjudication Date: 09/02/25

Remittance Date: 09/03/25

Check Number: 44870

Total Amount: \$530.00

Payment Amount: \$220.15

Patient—STRUDEL, PERSON

Payor Claim Control Number: FH59

Ins ID: n/a

Claim Service Date: 09/30/25

Date	Procedure Code	Modifiers	Quantity	Charge Amount	Payment Amount	Claim Status Category	Claim Status Code	Entity Identifier	Claim Status Date
09/30/25	99393	25	1	250.00	134.43	F3N	65		10/02/25
09/30/25	90656		1	55.00	23.60	F3N	65		10/02/25
09/30/25	90460		1	55.00	16.20	F3N	65		10/02/25
09/30/25	99173	59	1	40.00	3.75	F3N	65		10/02/25
09/30/25	96110		1	30.00	13.61	F3N	65		10/02/25
Total:				530.00	220.15				

Key

Code	Type	Description
1	Claim Status	For more detailed information, see remittance advice.
65	Claim Status	Claim/line has been paid

Insurance Balances

Claim Rejections Unpaid Encounters

Unpaid Encounters – View Details

Encounter Details

Patient: Kaitlin E. Melnick (PC# 2496)

Date of Service: 11/09/25 (24 Days Elapsed)

Insurance: BCBS Generic

Provider of Service: Kathleen W. Gomez, M.D.

Billing Provider: Kathleen W. Gomez, M.D.

Place of Service: Winoski Pediatrics

Balance Information

Insurance Due: \$397.00 (BCBS Generic)

Personal Due: \$0.00

Encounter Billing Notes

New Note

12/03/25 Mark Williams, M.D.

Rejected 11/20, adjusted ID and resubmitted.

Claim Status

Request Claim Status

Claim Status Response: BCBS 4444 333

Assigned To:

Unpaid Encounter Status:

Billing History Edit Charges Cancel Save



Part 7: Insurance RCM: ERA's

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:	21,218.57	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

When items on an ERA could not be autoposted, a summary of the posting exceptions appears in this section, along with any special cases of interest



Part 7: Insurance RCM: ERA's

Autopost

Posting Exceptions (7)

Posting Exceptions

Posting Exceptions are payments that were not autoposted and need attention.

Search Filter:

Posting Exception Status	ERA Processed Date	Check Number	Remittance Date	Payor	Patient	Date of Service	Exception Reason	ERA Processed By
Needs Attention	07/30/25 02:32PM	123456	07/08/25	Cigna	Smith, Pat	05/19/25	Total of payments an...	Ellen Biller
Needs Attention	07/30/25 02:32PM	200000						
Needs Attention	07/30/25 02:32PM	100000						
Needs Attention	07/30/25 02:32PM	200000						
Needs Attention	07/30/25 09:22AM	100000						
Needs Attention	07/30/25 09:22AM	200000						
Needs Attention	07/30/25 09:22AM	100000						

Autopost

Posting Exceptions (7)

Posting Exceptions - View Details

Patrick Smith 12 yrs, 10 mos 09/22/12 M

Encounter

Patient: Patrick Smith (PCC# 181888)

Date Of Service: 05/19/25

Electronic Remittance Advice

SMITH, PATRICK

Payor Claim Control Number: 888888888888 PCC ID: 888888888888 Ins ID: 888888888888 Processed as Primary

Date	Procedure Code	Charge	Deductible	Copay/Coinsurance	Personal Other	Total Personal Due	Contractual Adjustment	Other Adjustment	Payment
05/19/25	99213	225.00	0.00	0.00	0.00	0.00	225.00 216 CO	0.00 N10	0.00
05/19/25	87651-QW	85.00	0.00	0.00	0.00	0.00	85.00 216 CO	0.00 N10	0.00
05/19/25	G2211	45.00	0.00	0.00	0.00	0.00	0.00	45.00 23 OA	0.00
TOTALS:		355.00	0.00	0.00	0.00	0.00	310.00	45.00	0.00

Charge 100% Adjusted (99213)
Charge 100% Adjusted (87651-QW)
Charge 100% Adjusted (G2211)
Total of payments and adjustments was greater than the pending amount (CPT 99213)
Total of payments and adjustments was greater than the pending amount (CPT 87651-QW)
Total of payments and adjustments was greater than the pending amount (CPT G2211)

Key

Type	ID	Description
CARC Code	216	Based on the findings of a review organization
CARC Code	23	The impact of prior payer(s) adjudication including payments and/or adjustments.
CARC Group	CO	Contractual Obligation
CARC Group	OA	Other Adjustment

Posting Exception Status: Needs Attention

Edit Charges Insurance Payments Cancel Save Save + Next

7 Posting Exceptions

Posting Exception Status: Needs Attention

ERA Processed By: Ellen Biller

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Part 7: Insurance RCM: Insurance Posting



Insurance Payments Pebbles Flintstone 10 years 01/23/15

Posting History (Fred Flintstone)

Claim ID:
Patient Flags:
Account Flags:

Insurance Payment - Edit:

Transaction Date: 12/24/23 Check Number: 414141414 Payor Claim Control #: 555555555 Payment Type: Ins Pmt Adjustment Type: Ins Adj Current Policy: Aetna USHC HMO \$10/25 Next Policy: Personal

Distribution:

Date of Service	CPT	Charge Amount	Expected Copay	Pending Insurance	Payment	Adjustment	Personal Balance	CARC:	Covered Amount
12/02/23	99392	135.00	10.00	125.00	92.36	32.64	0.00		102.36
12/02/23	99173	10.00	0.00	10.00	10.00	0.00	0.00		10.00
12/02/23	92551	10.00	0.00	10.00	10.00	0.00	0.00		10.00
12/02/23	90658	15.00	0.00	15.00	13.93	1.07	0.00		13.93
Totals:		170.00	10.00	160.00	126.29	33.71	0.00		136.29

12/24/23 126.29 Ins Pmt - Aetna HMO 414141414 0.00
33.71 Ins Adj - Aetna HMO 0.00
07/15/23 0.00 Ins Pmt - Aetna HMO 090909090 0.00

Print Receipt Print Statement Refund Credits Reverse Payment Edit Close

You can edit any of the check, payment, or adjustments details; you can also edit expected copay and next policy

Delete Cancel Save

Insurance Payments Pebbles Flintstone 10 years 01/23/15 F

Posting History (Fred Flintstone)

Payment History Fred Flintstone (Account # 1980) Search Filter:

Transaction Date	Amount	Payment Type	Check Number	Refunds/Reversals	Unapplied Amount
02/10/25	60.00	Master Card Payment			0.00
03/15/24	10.00	Visa Card Payment			0.00
02/09/24	68.00	Ins Pmt - Cigna PPO	9999999		0.00
01/28/24	20.00	Visa Card Payment			0.00
01/04/24	34.74	Ins Pmt - Cigna PPO	888888888		0.00
	10.26	Ins Adj - Cigna PPO			0.00
12/24/23	126.29	Ins Pmt - Aetna HMO	414141414		0.00
	33.71	Ins Adj - Aetna HMO			0.00
07/15/23	0.00	Ins Pmt - Aetna HMO	090909090		0.00

Print Receipt Print Statement Refund Credits Reverse Payment Edit Close

Confirmation - Reverse Payment

Confirmation - Reverse Payment

The payment will be reversed.

The adjustment will be deleted.

The charge(s) will return to pending BCBS \$10copay.

Cancel Save + Repost Payment Save

Michael Addington 94016 Peak Flow review/interpretation Mark Williams



Part 7: Insurance RCM: Corrected Claim



Prior Authorization Number: Accident State:

Date First Seen:

Payor Claim Control #: Capital Blue Cross 2024-12-03 #1111111

Claim Delay Reason:

☐ Queue a claim for this encounter

Deselect a diagnosis or procedure to remove it from the billing record

Payor Claim Control #:

☒ Replace prior claim ☐ Void/cancel prior claim

Claim Delay Reason:

☐ Queue a claim for this encounter (Aetna)

Select a new diagnosis or procedure to add it to the claim

Payor Claim Control #:

☒ Replace prior claim ☐ Void/cancel prior claim

Claim Delay Reason:

☐ Queue a claim for this encounter

Patient: Visit Reason:

1 Proof of Eligibility Unknown or Unavailable
2 Litigation
3 Authorization Delays
4 Delay in Certifying Provider
5 Delay in Supplying Billing Forms
6 Delay in Delivery of Custom-made Appliances
7 Third Party Processing Delay
8 Delay in Eligibility Determination
9 Original Claim Rejected or Denied Due to a Reason Unrelated to the Billing Limitatio...
10 Administration Delay in the Prior Approval Process

Edit Charges Abigail Addington 10 years 02/18/16 F

Place of Service:

Appt Provider:

Provider of Service:

Appt Note:

Diagnoses

Include Dx on Claim	ICD-10	Description	Linked Procedures
☒	J02.0	Streptococcal pharyngitis SNOMED: Streptococcal sore throat	99213, 87880
☒	J45.991	Cough variant asthma SNOMED: Cough variant asthma	99213, 87880

select an ICD-10 diagnosis

Procedures Insurance: Primary: Capital Blue Cross Secondary: Aetna 10 Capitated

Procedures	Units	Price	Insurance	Ins Due	Ins Adj	Pers Due	Discount	Source
☒ 99213 OV Expanded Focus Dx: 1) J02.0 2) J45.991	1	100.00	Primary	90.00	0.00	10.00		Electronic Encounter Form
☒ 87880 Rapid Strep Screen Dx: 1) J02.0 2) J45.991	1	30.00	Primary	30.00	0.00	0.00		Lab (Ordered) DETAILS&
Totals:		130.00		120.00	0.00	10.00	0.00	

select a procedure



Part 7: Insurance RCM: Balancing Insurance Checks

Electronic Remittance Advice

Autopost Posting Exceptions (127) Custom Posting Exceptions

Autopost

The source of the information displayed is the payor. Search: 04/09/26

Remittance	Transaction	Processed	Payor	Check#	Amount
03/20/26	04/09/26	04/09/26	BCBS	00855991	838.43
03/21/26	04/09/26	04/09/26	BCBS	00856011	571.41
03/21/26	04/09/26	04/09/26	BCBS	00309174	331.00
03/19/26	04/09/26	04/09/26	BCBS		
03/24/26	04/09/26	04/09/26	BCBS		

Status: Processed

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Payment Totals by Check Number

Compare posted insurance check payments against ERA/EOB amounts to ensure that all payments were entered.

Posting Date: From 04/09/2026 to 04/09/2026
Payment Class: Insurance

Columns: All 7 Displayed Group By: Check Number Search Filter: peoples

Posting User	Insurance Group	Transaction Date	Check Number	Total Payment Amount	Total Refund Amount	Net Total
▼ 0085599146 (2 results)						
Peoples Computer Company	BCBS	04/09/2026	00855991	\$732.54	\$0.00	\$732.54
Peoples Computer Company	BCBS	04/09/2026	00855991	\$105.89	\$0.00	\$105.89
				\$838.43	\$0.00	\$838.43
▼ 0085601148 (2 results)						
Peoples Computer Company	BCBS	04/09/2026	00856011	\$571.41	\$(84.66)	\$486.75
Peoples Computer Company	BCBS	04/09/2026	00856011	\$84.66	\$0.00	\$84.66
				\$656.07	\$(84.66)	\$571.41
▼ 0030917479 (4 results)						
Peoples Computer Company	BCBS	04/09/2026	00309174	\$331.00	\$0.00	\$331.00
Peoples Computer Company	BCBS	04/09/2026	00309174	\$312.30	\$0.00	\$312.30
Peoples Computer Company	BCBS	04/09/2026	00309174	\$568.11	\$(473.26)	\$94.85
Peoples Computer Company	BCBS	04/09/2026	00309174	\$674.21	\$(1,081.36)	\$(407.15)
				\$1,885.62	\$(1,554.62)	\$331.00



Part 8: Personal RCM: Automated Statements

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

Electronic Bills – Prepared

124 Electronic bills are prepared to submit.

- 64 Current
- 29 Overdue 30 days
- 16 Overdue 60 days
- 15 Overdue 90 days

Billing fees are charged to qualifying accounts when bills are submitted.
Use work with Accounts to see which accounts will receive billing fees and to preview bills.

Electronic Bills | Paper Bills | Log | E-billing Messages | Paper Billing Messages | Bills Last Submitted: 07/17/24

Electronic Bills

Select electronic bills to be prepared:

Select All

☒ Current
☒ Overdue 30 days
☒ Overdue 60 days
☒ Overdue 90 days
☒ Overdue 120 days

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

Electronic Bills

Select electronic bills to be prepared:

Select All

☐ Current
☐ Overdue 30 days
☐ Overdue 60 days
☐ Overdue 90 days
☐ Overdue 120 days

Electronic Bills Submitted

124 Electronic bills were submitted

- 64 Current
- 29 Overdue 30 day
- 16 Overdue 60 day
- 15 Overdue 90 day

12 billing fees were posted.

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

Log – Bill Run 03/30/26 11:35am

Accounts Billed Accounts Not Billed

Aging: Current, 30, 60, 90

Search:

Name	Account #	Billed Amount	Billing Fee
Debra O'Hern	1481	258.09	15.00
Eric T Whitehead	1908	398.00	15.00
Donald Caruso	1466	227.60	15.00
Mark A. Harris	794	69.91	15.00
Scott James	102	571.00	15.00
Barry Krahling	1354	410.00	15.00
Linda Tezak	1344	201.43	15.00
Thomas Willard	345	245.27	15.00
Jeremy Achey	1465	56.00	
Roseanne Baird	732	100.00	

Close

Prepare E-bills

Back

View Bill



Part 8: Personal RCM: Personal Balances



Personal Balances

► Criteria

Account Name ▲	0-29 Days	30-59 Days	60-89 Days	90-119 Days	120+ Days	Total Personal Balance	Last Personal Payment
Bibb, Jill	\$0.00	\$0.00	\$0.00	\$0.00	\$185.00	\$185.00	06/16/25
Bibb, Mylinda	\$0.00	\$0.00	\$5.00	\$0.00	\$355.00	\$360.00	08/10/25
BigFamily, Hank And Howard	\$0.00	\$0.00	\$0.00	\$0.00	\$165.00	\$165.00	01/19/25
Billet, Marilyn	\$0.00	\$0.00	\$0.00	\$0.00	\$40.00	\$40.00	07/12/25
Bixler, John D	\$0.00	\$0.00	\$0.00	\$0.00	\$362.00	\$362.00	07/23/25
Blose, Ann	\$0.00	\$0.00	\$0.00	\$0.00	\$149.00	\$149.00	08/12/25
Blouch, Rebecca	\$41.49	\$0.00	\$0.00	\$0.00	\$235.00	\$276.49	07/12/25

645 Accounts

Personal Balances

Personal Balance
Minimum \$5.00

Last Reviewed
Balance reviewed more than days ago

Last Personal Payment
More than days ago

Last Bill
More than days ago

Include By Account Flags

Exclude By Account Flags



Part 8: Personal RCM: Payments



Review balances,
demographics,
account notes,
and more

Payments
Fred Flintstone (Account # 1980)

Pers Due Description
160.00 Previous Balance (as of 07/14/21 11:02am)
-140.00 Unsaved Payments
20.00 Balance

As you enter payment information, the ledger will display the outcome

Transaction Date Payment Type Amount Check # Apply to Prev Bal Unapplied Provider
07/14/21 Personal Check Payment 140.00 12345 140.00 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
EMG Phone #:

Cancel Save Save + Exit





Part 8: Personal RCM: Payments

Payments Jeffrey Addington Account #1238 730 Grandview Drive

Posting History

Payments

Jeffrey Addington (Account # 1238)

Pers Due Description

207.00	Previous Balance (as of 03/26/26 11:19am)
0.00	Unsaved Payments
207.00	Balance

Transaction Date Payment Type Amount Check # Apply to Prev Bal

03/26/26			0.00		0.00
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► Distribution

Save Payment Print Receipt

Enter a new credit card while posting a payment

Credit Card On File - Add

Card number: *****1234 VISA

Expiration Date: 03 2026

Name on card: Jeffrey M Addington

Card Nickname: Dad Visa

Cancel Save

Payments

Jeffrey Addington (Account # 1238)

Pers Due Description

207.00	Previous Balance (as of 03/26/26 11:19am)
-207.00	Unsaved Visa Card Payment
0.00	Balance

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

03/26/26	Visa (ending in 1234)		207.00		207.00	0.00	
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Visa (ending in 1234)

Amex

Discover Card

Discover Card Payment

Master Card Payment

Novus Card Payment

TOS Cash Payment

TOS Check Payment



Part 8: Personal RCM: Payment History

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
► 05/05/22	60.00	Master Card Payment		30.00
► 06/07/21	10.00	Visa Card Payment		0.00
► 05/03/21	68.00	Ins Pmt - Cigna PPO		0.00
► 05/03/21	0.00	Ins Pmt - Cigna PPO		0.00
► 05/03/21	0.00	Ins Pmt - Cigna PPO		0.00
► 04/21/21	20.00	Visa Card Payment		0.00
► 03/28/21	23.45	Ins Pmt - Cigna PPO		0.00
► 03/28/21	6.55	Ins Adj - Cigna PPO		0.00
► 03/28/21	11.29	Ins Pmt - Cigna PPO		0.00
► 03/28/21	3.71	Ins Adj - Cigna PPO		0.00
► 03/17/21	92.36	Ins Pmt - Aetna HMO		0.00
► 03/17/21	32.64	Ins Adj - Aetna HMO		0.00

Double-click on a payment to edit it

Print Receipt Edit Close

Payment History - Edit

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

05/05/22 Master Card Payment 60.00 60.00 0.00

Distribution

Date	Patient	Code	Description	Charge	Personal Due	Distribution	Balance
12/10/21	Dino Flintstone	99213	OV Expanded Focus	79.00	15.00	15.00	0.00
12/10/21	Pebbles Flintstone	99213	OV Expanded Focus	79.00	15.00	15.00	0.00
05/05/22	Pebbles Flintstone	99211	OV Minimal	30.00	15.00	15.00	0.00
05/05/22	Dino Flintstone	99211	OV Minimal	30.00	15.00	15.00	0.00
05/05/22	Pebbles Flintstone	99211	OV Minimal	30.00	15.00	0.00	15.00
Totals:					75.00	60.00	15.00

Distribution total must equal the Apply to Previous Balance amount.

You can edit a payment's date, type, amount, check #, and how it applies to balances

Delete Cancel Save



Part 8: Personal RCM: Reporting

Report Library

Payment Reconciliation

Reconcile payments entered into PCC against money collected.

Posting Date: From 05/03/2019 to 05/03/2019
Transaction Date: From 05/03/2019 to 05/03/2019
User: All
Location: All

Payments are grouped by Payment Type by default

Columns: 6 Displayed Group By: Payment Type Search:

Transaction Date	Payment Name	User	Patient Name	Account Name	Amount
Cash Payment (3)					
05/03/2019	TOS Cash Payment	mark	Martin, Matthew M.	Martin, Thomas	\$56.00
05/03/2019	TOS Cash Payment	mark	Renard JR., Elizabeth "Nicole" Lynn	Renard, Brian	\$60.00
05/03/2019	TOS Cash Payment	mark	Zeller, Erin Marie	Zeller, Dawn	\$166.00
					\$282.00
Credit Card Payment (1)					
05/03/2019	Master Card Payment	mark	Jones, Aleksandra		\$5.00
					\$5.00
Personal Check Payment (1)					
05/03/2019	TOS Check Payment	mark	Kneasel, Kate	Kneasel, Jesseca	\$45.00
					\$45.00
					\$332.00

5 results

Report Library Back Export Close Print

A subtotal is calculated per group, with a grand total appearing at the bottom of the report

Session Takeaways

1. Takeaway
2. Takeaway
3. Takeaway
4. Etc, etc, etc





Session Takeaways



- 1. Revenue Cycle Management is not just collecting money due, it is a cyclical process that takes many hands to maximize.**
- 2. PCC is a partner in this. The tools and workflows we create should save you time and effort. If they do not we should talk.**
- 3. Thinking about every aspect of the process can help open opportunities to find where you can improve your revenue.**



**Please complete the course
survey in the UC App.**





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?

