



What's New with Billing in PCC EHR?

Brian Kennedy





Session Objectives

Review the EHR billing tools added in the last year!





Review 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



Review Claim Rejections

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: 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

Unpaid Insurance 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



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.

Assigned To:

Encounter Status:

Under review

Waiting on PCC

Waiting on Family

Waiting on Payor

Billing History

Edit Charges

Cancel

Save



Custom Encounter Status

Insurance Balances

Claim Rejections

Unpaid Encounters

Status Configuration

Unpaid Encounter Status Configuration

Search Filter:

Status Name

Check at 60 Days

Out on Appeal

Under Review

Waiting on Family

Waiting on Payor

Waiting on PCC

Won't Collect

7 Statuses

Add

Delete

Close



Sort by Assigned User

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

Aging:

All ▼

Place of Service:

All Places of Service ▼

Provider of Service:

All Providers ▼

Encounter Status:

Waiting on Payor ▼

Assigned User:

Anita Sharp ▼

Back

View Details



Insurance at Time of Service

Encounters by Billing Status

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

Encounter Date: From 02/23/2026 to 03/25/2026
Primary Insurances at Date of Service: AmeriHealth, AmeriHealth \$10, AmeriHealth \$10-OV;Full WC coverage, AmeriHealth \$15, Green Leaf Ins \$0, Green Leaf Ins \$10, Green Leaf Ins \$10 Farmers, Green Leaf Ins \$15 Farmers , Green Leaf Ins \$20, Green Leaf Smiths

Columns: 8 Displayed Group By: None

Encounter Date/Time	Patient Name	Primary Insurance at Date of Service	Encounter Reason	Provider
03/01/2026 3:15PM	Minich V., Terry R	AmeriHealth \$20	Sick Call	Mark Williams, M.D.
03/02/2026 12:15PM	Warner SR., Matthew "Liam" Morgan	Green Leaf Ins \$0	Sick Call	Mark Williams, M.D.
03/05/2026 10:30AM	Narbold M.D., Samantha "Ricky" Lane	Green Leaf Insurance \$10 Smiths	Flu Vaccine	Office
03/06/2026 8:15PM	Schoonover, Kelly A	Green Leaf Insurance \$10	Sick Call	Mark Williams, M.D.

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Encounter Billing Notes



Claim Rejections

Unpaid Encounters

Unpaid Encounters — View Details

Encounter Details

Patient: Meagan William Miller (PCC# 393)
Date of Service: 09/12/25 (54 Days Elapsed)
Insurances: Personal, Health Assurance CCPPO \$15
Provider of Service: Mark Williams, M.D.
Billing Provider: Mark Williams, M.D.
Place of Service: Winooski Pediatrics

Balance Information

Insurance Due: \$18.00(Health Assurance CCPPO \$15)
Personal Due: \$0.00

Encounter Billing Notes

New Note

New Note:

11/05/25 Mark Williams, M.D.  

Spoke with Health Assurance Rep 100047. Resolved mysterious dispute. Payment will be processed on corrected claim submitted 2025-10-25.

Assigned To: Jay Schuster

Encounter Status: Waiting on Payor

Billing History

Edit Charges

Cancel

Save



Work Personal Balances

Personal Balances

► Criteria

Search Filter:

Account Name ▲	0-29 Days	30-59 Days	60-89 Days	90-119 Days	120+ Days	Total Personal Balance	Last Personal Payment	Last Bill	Last Reviewed
Bibb, Jill	\$0.00	\$0.00	\$0.00	\$0.00	\$185.00	\$185.00	06/16/25	08/21/25	
Bibb, Mylinda	\$0.00	\$0.00	\$5.00	\$0.00	\$355.00	\$360.00	08/10/25	08/21/25	
BigFamily, Hank And Howard	\$0.00	\$0.00	\$0.00	\$0.00	\$165.00	\$165.00	01/19/25	08/21/25	
Billet, Marilyn	\$0.00	\$0.00	\$0.00	\$0.00	\$40.00	\$40.00	07/12/25	08/21/25	
Bixler, John D	\$0.00	\$0.00	\$0.00	\$0.00	\$362.00	\$362.00	07/23/25	08/21/25	
Blose, Ann	\$0.00	\$0.00	\$0.00	\$0.00	\$149.00	\$149.00	08/12/25	08/21/25	
Blouch, Rebecca	\$41.49	\$0.00	\$0.00	\$0.00	\$235.00	\$276.49	07/12/25	08/21/25	

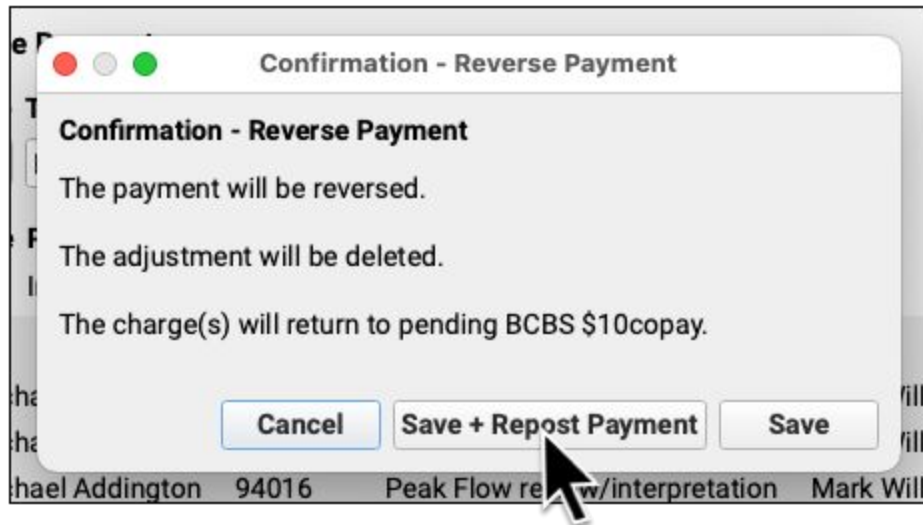
645 Accounts

Mark as Reviewed

Back

Open Account

Takeback and Re-post





Insurance Payments

Abigail Addington 10 years 08/23/15 F

Posting History (Jeffrey Addington)

Patient Flags: Chronic, Burlington Pediatrics
Account Flags:

Insurance Payment:

Transaction Date: 08/25/25
Check Number:
Payor Claim Control #:
Payment Type: Ins Pmt
Adjustment: Ins A

Distribution:

Date of Service	CPT	Charge Amount	Expected Copay	Pending Insurance	Payment	Adjustment	Personal Balance	BARC: Code	Covered Amount
09/18/24	94010	70.00	0.00	70.00	37.06	32.94	0.00		37.06
09/18/24	94375	28.00	0.00	28.00	0.00	28.00	0.00		0.00
09/18/24	94016	25.00	0.00	25.00	25.00	0.00	0.00		25.00
09/18/24	99214-25	87.00	10.00	77.00	70.72	6.28	0.00		80.72
Totals:		210.00	10.00	200.00	132.78	67.22	0.00		142.78

Cancel Save Save + Post

The previous payment and adjustment amounts are filled out for you automatically, and you only need to change the amounts that the payor changed



Delete Reversals

Payment History - Reverse Payment - Edit

	Transaction Date	Transaction Type	Amount	
Reversal:	11/10/25	Insurance Takeback	(26.16)	Delete

	Transaction Date	Payment Type	Amount
▶	06/14/25	Ins Pmt - Capital B'	

Confirm - Delete Reversal

"Insurance Takeback" payment reversal will be deleted.

The payment and adjustments will be reapplied to the original charges.



Auto Posting Exceptions

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	2000002	07/08/25	Cigna	Smith, Matt	05/22/25	Total of payments an...	Ellen Biller
Needs Attention	07/30/25 02:32PM	1000001	07/08/25	Cigna	Smith, Kat	01/06/25	Charge not pending ...	Ellen Biller
Needs Attention	07/30/25 02:32PM	2000002	07/08/25	Cigna	Ado, Midge	01/06/25	Did not find an ...	Ellen Biller
Needs Attention	07/30/25 09:22AM	1000001	02/24/25	Cigna	Ado, Pidge	02/13/25	Charge not pending ...	Ellen Biller
Needs Attention	07/30/25 09:22AM	2000002	02/24/25	Cigna	Ado, Wedge	10/21/24	Charge not pending ...	Ellen Biller
Needs Attention	07/30/25 09:22AM	1000001	02/24/25	Cigna	Canning, John	02/15/25	Charge not pending ...	Ellen Biller

7 Posting Exceptions

Posting Exception Status: Needs Attention

ERA Processed By: Ellen Biller

Page Up Page Down Page 1 / 1

Edit Charges Insurance Payments Close View Details



Custom Posting Exceptions

Autopost

Posting Exceptions (0)

Custom Posting Exceptions

Custom Posting Exceptions

Create posting exceptions by insurance groups for selected CARCs.

Description	Insurance Groups	CARCs	Last Modified
Healthy Reassurance Claims with a 444444 CARC	1 Group	1 CARC	Mark Williams, M.D. 11/10/25 12:21pm
Unusual Cigna Adjustment That We Post Manually	1 Group	2 CARCs	Mark Williams, M.D. 11/10/25 12:20pm

Add

Delete

Edit

Close



Charge Billing Fees

Electronic Bills

Paper Bills

Log

E-billing Messages

Paper Billing Messages

Billing Fees

Billing Fees
Billing Fees: ☒ On ☐ Off (Billing fees are posted when bills are generated.)
Settings
Billing fee procedure to post: Overdue Billing Fee (\$15.00) x ▾
Provider to post: Office ▾
☐ Post billing fees for accounts with a budget amount set
Exclude By Account Flags

Edit

▼ 2 Account Flags Excluded
Collection
Budget

Criteria (Billing fees are posted for accounts that meet all the criteria.)
Accounts with a balance over \$9.99
Accounts with a balance over 90 ▴ ▾ days old
Accounts that received 3 ▴ ▾ or more bills for the current charges with a balance
Accounts with the most recent billing fee posted over 31 ▴ ▾ days ago

CloseSave

Use settings and criteria to precisely control automatic billing fees at your practice



Print Bills by A/R Group

Personal Balances

Personal Balances

Print Queue

► Criteria

Search Filter:

Account Name ▲	0-29 Days	30-59 Days	60-89 Days	90-119 Days	120+ Days	Total Personal Balance	Last Personal Payment	Last Bill	Last Reviewed
Buchanan, John	\$0.00	\$112.00	\$24.00	\$0.00	\$0.00	\$136.00	01/07/26	12/23/25	
Callahan, David	\$0.59	\$2.43	\$10.00	\$0.00	\$0.00	\$13.02	03/01/26	08/16/25	
Kopec, Stephen	\$0.00	\$0.00	\$20.00	\$0.00	\$0.00	\$20.00	01/28/26	07/04/25	
Meinzer, Holley	\$30.00	\$0.00	\$172.00	\$0.00	\$0.00	\$202.00	01/07/26	12/04/25	
Merchant, Alan	\$0.00	\$0.00	\$10.00	\$0.00	\$0.00	\$10.00	11/24/25	12/20/25	
Morrissey III, Madeline	\$0.00	\$0.00	\$67.72	\$0.00	\$0.00	\$67.72	09/08/25	10/21/25	
Potter, Mark	\$0.00	\$0.00	\$56.40	\$0.00	\$0.00	\$56.40	01/22/26	10/01/25	
Stoak, George	\$0.00	\$0.00	\$34.32	\$0.00	\$0.00	\$34.32	02/26/26	12/23/25	

9 Accounts

Prepare Paper Bills

Mark as Reviewed

Back

Open Account



Print Individual Paper Claims

Procedures

Insurance: Primary

Primary: Capital Blue Cross

Procedures	Units	Price	Insurance	Ins Due	Ins Adj	Pers Due	Discount	Source
☒ 99214 OV Detailed H&E ▶ Dx: 1) J03.00	1	87.00	Primary	77.00	0.00	10.00		
☒ 87880 Rapid Strep Screen ▶ Dx: 1) J03.00	1	27.00	Primary	27.00	0.00	0.00		
Totals:		114.00		104.00	0.00	10.00	0.00	

Claims

☒ Generate a claim for this encounter (Capital Blue Cross) ☐ Queue ☒ Print

▶ include all pending procedures





Print Paper Claim Batches

Submission

Needs Correction (153)

Paper Claims (136)

Holds

Delay

Log

Paper Claims

Paper Claim Batch	Last Printed	Claims
BCBS Paper Claims	<i>never</i>	1
UHC Paper Claims	<i>never</i>	6
Other Paper Claims	<i>never</i>	129

Close

Print Claims



Credit Card on File

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 # App

03/26/26 [Dropdown] [Credit Card Icon] 0.00 [Dropdown]

► Distribution

Save Payment Print Receipt

Enter a new credit card while posting a payment

Credit Card On File

Credit Card On File - Add

Card number: [*****1234]

Expiration Date: [03] [2026]

Name on card: [Jeffrey M Addington]

Card Nickname: [Dad Visa]

Cancel Save



Real Time Claim Status

Insurance Balances

Claim Rejections

Unpaid Encounters

Unpaid Encounters — View Details

Encounter Details
Patient: Kaitlin E. Melnick (PCC# 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: Winooski 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



Real Time Claim Status

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:

Response Date: 10/02/25

1 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

Session Takeaways



Learned what new billing tools are available in
the EHR!





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



Do you have any questions?

