What's New with Billing in PCC EHR?

Brian Kennedy

PCC Pediatric EHR Solutions

UC 2026

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: 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

Unpaid Insurance Encounters

Insurance Balances

Claim Rejections | Unpaid Encounters

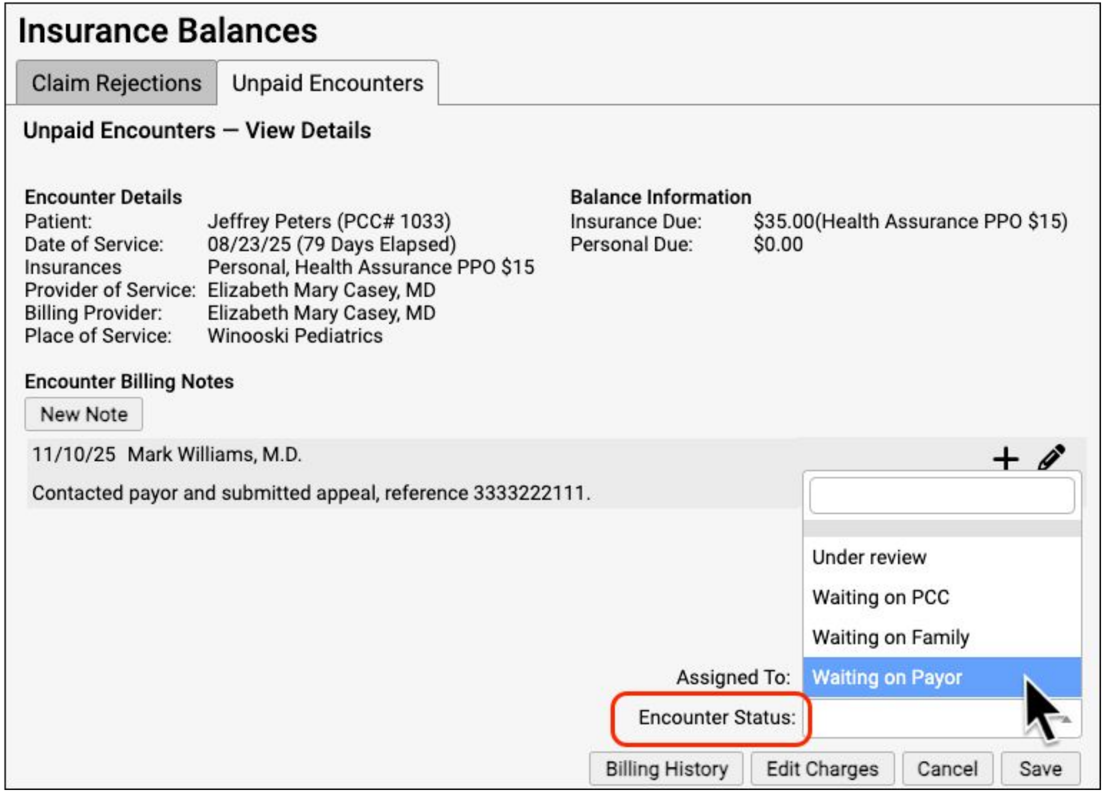
Unpaid Encounters

Unpaid encounters include charges pending on insurance payor. Aging cateories 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



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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 CCPPO $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

Encounter Status: Waiting on Payor

Provider of Service: All Providers

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.

Report Library | Schedule Report | Export | Back | Print

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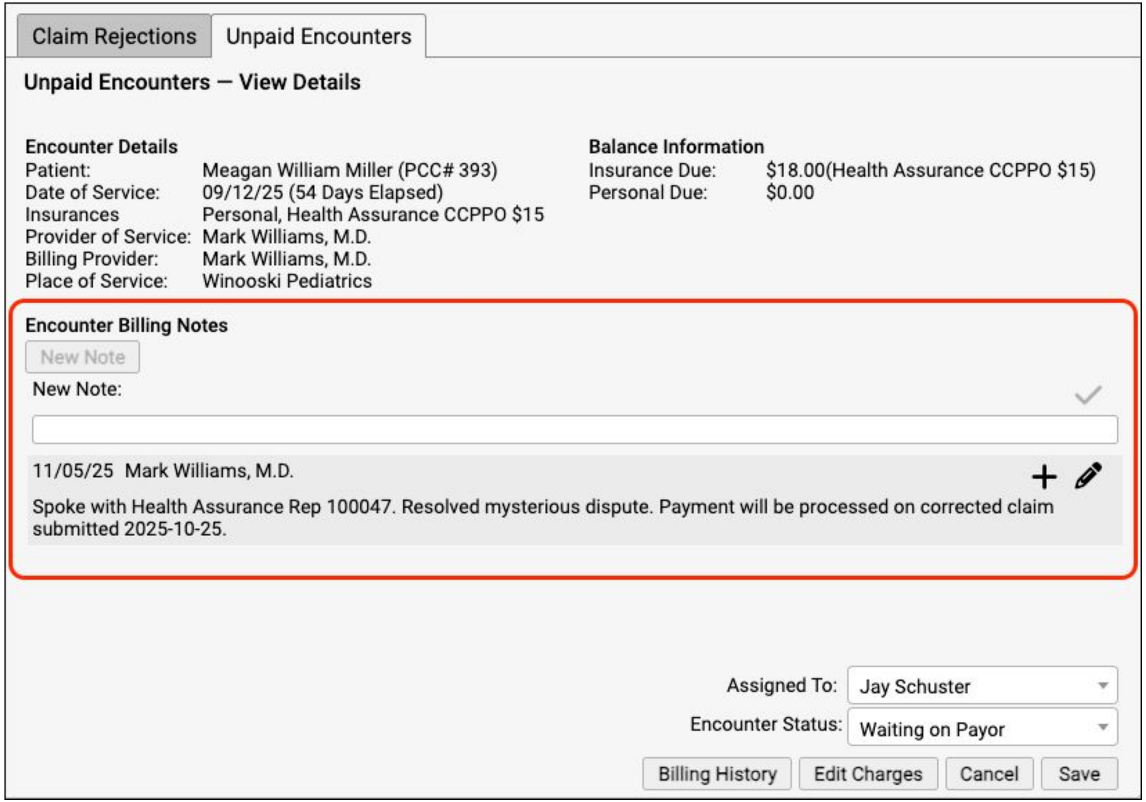
Encounter Billing Notes



Work Personal Balances

Personal Balances

▸ Criteria

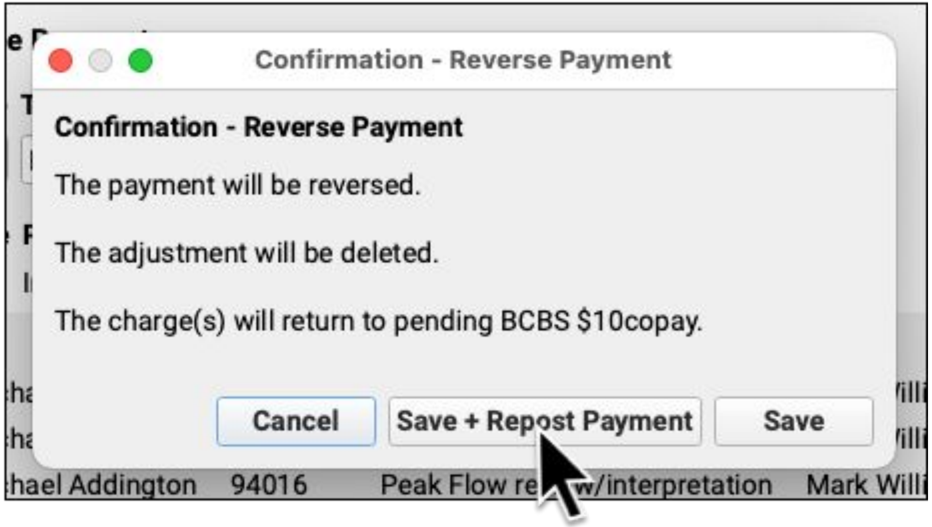
Search Filter:

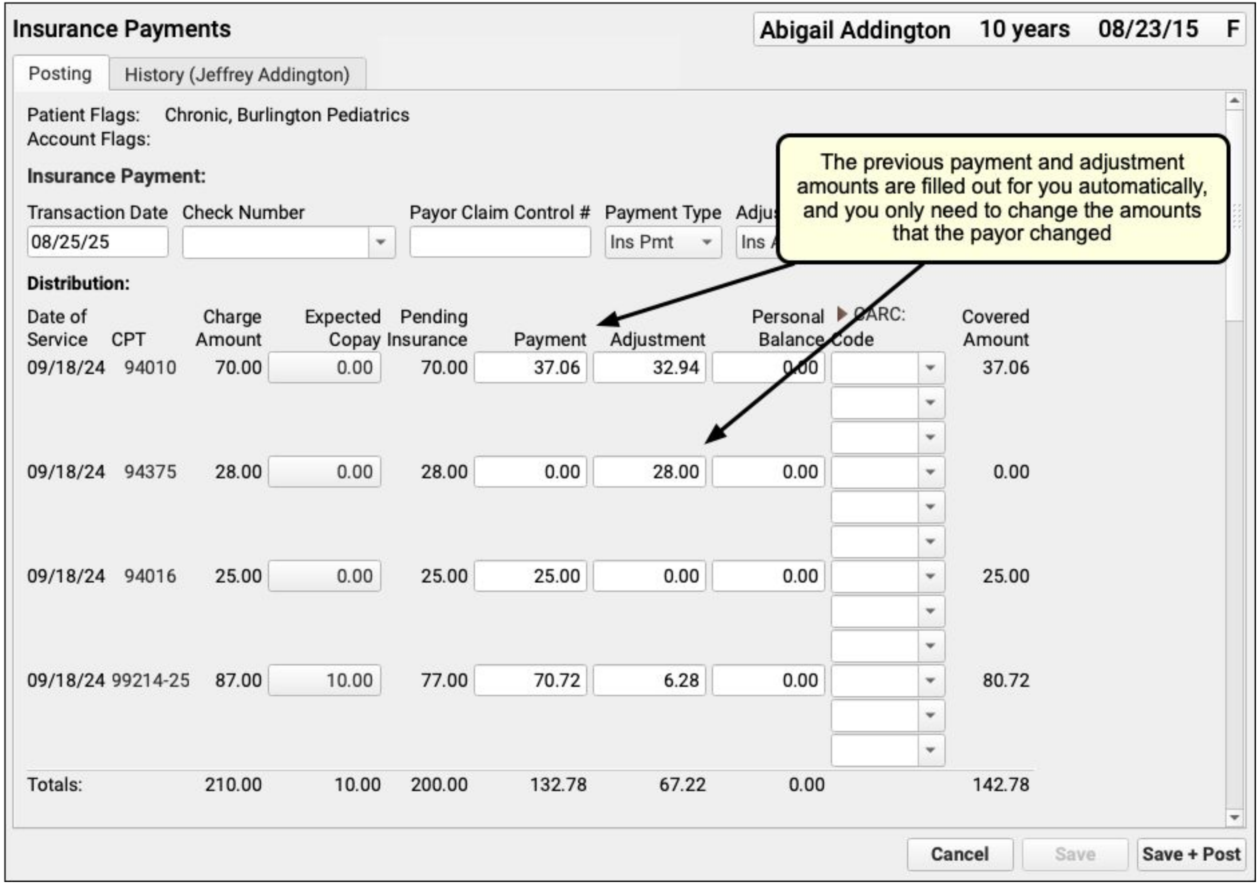
Account Name	0-29 Days	30-59 Days	60-89 Days	90-119 Days	120+ Days	Total Personal Balance	Last Personal Payment	Last Bill	Last Reviewed
Bibb, Jill	$0.00	$0.00	$0.00	$0.00	$185.00	$185.00	06/16/25	08/21/25	
Bibb, Mylinda	$0.00	$0.00	$5.00	$0.00	$355.00	$360.00	08/10/25	08/21/25	
BigFamily, Hank And Howard	$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

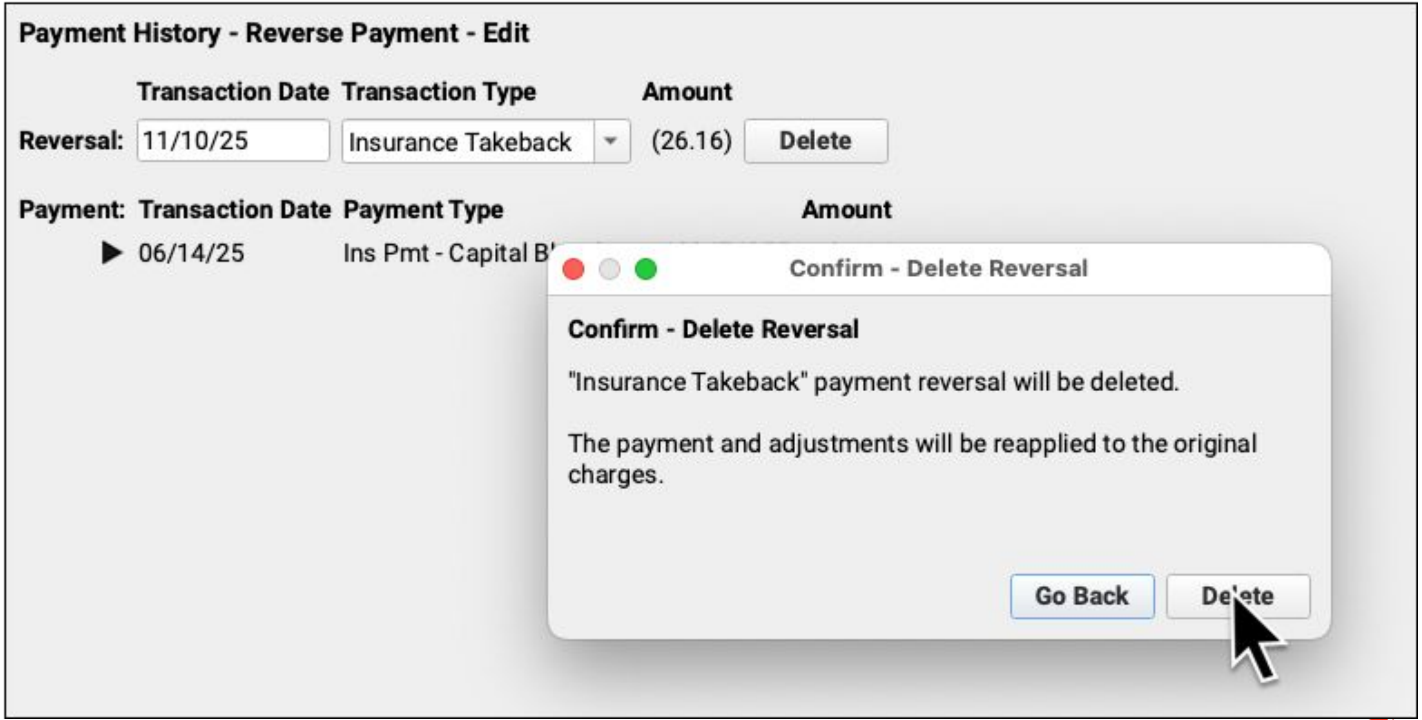
Mark as Reviewed | Back | Open Account

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
The previous payment and adjustment amounts are filled out for you automatically, and you only need to change the amounts that the payor changed
Distribution:
Date of Service CPT Charge Amount Expected Copay Pending Insurance Payment Adjustment Personal Balance CARC: 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

Delete Reversals



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

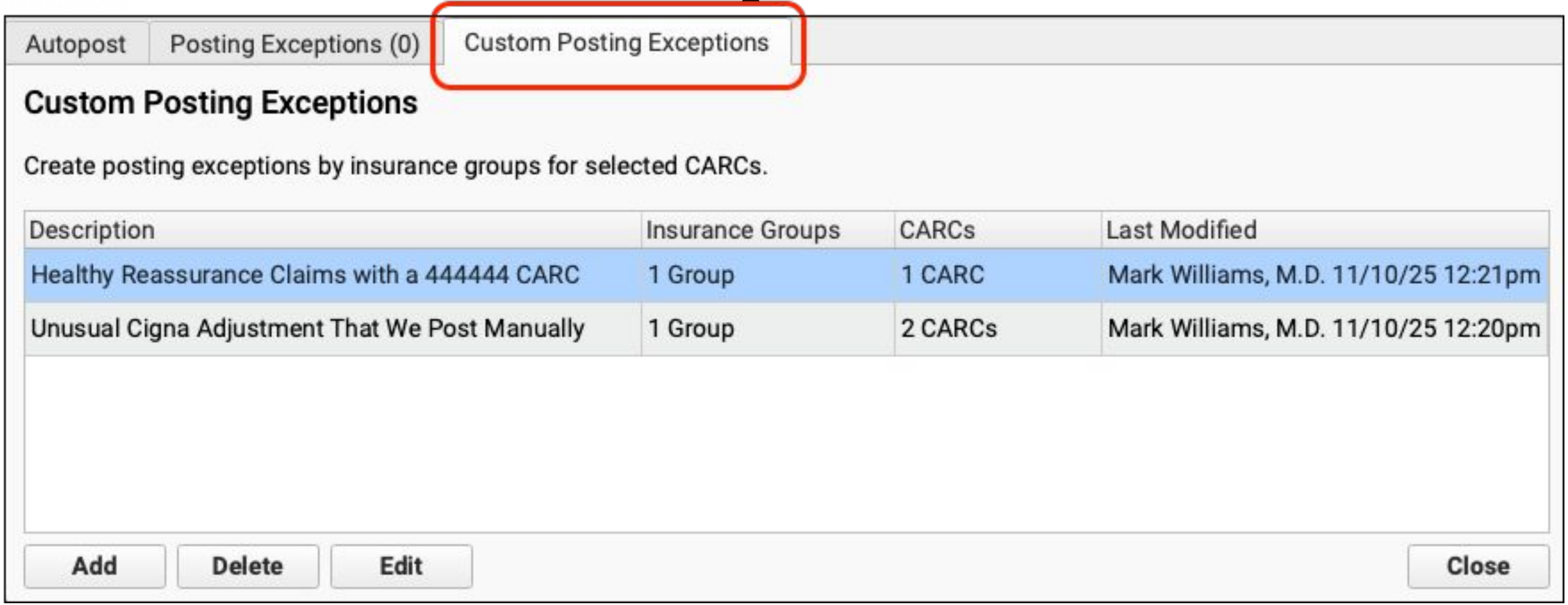
7 Posting Exceptions

Posting Exception Status: Needs Attention

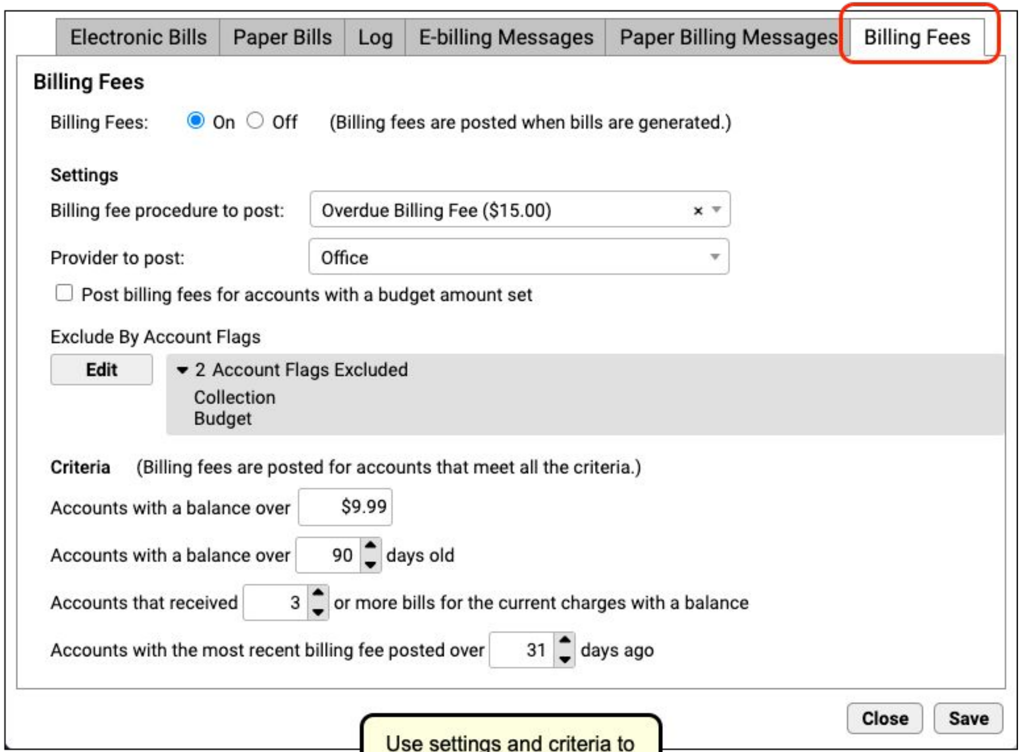
ERA Processed By: Ellen Biller

Page Up | Page Down | Page 1 / 1 | Edit Charges | Insurance Payments | Close | View Details

Custom Posting Exceptions



Charge Billing Fees



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

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Print Bills by A/R Group

Personal Balances

Personal Balances | Print Queue

▸ Criteria

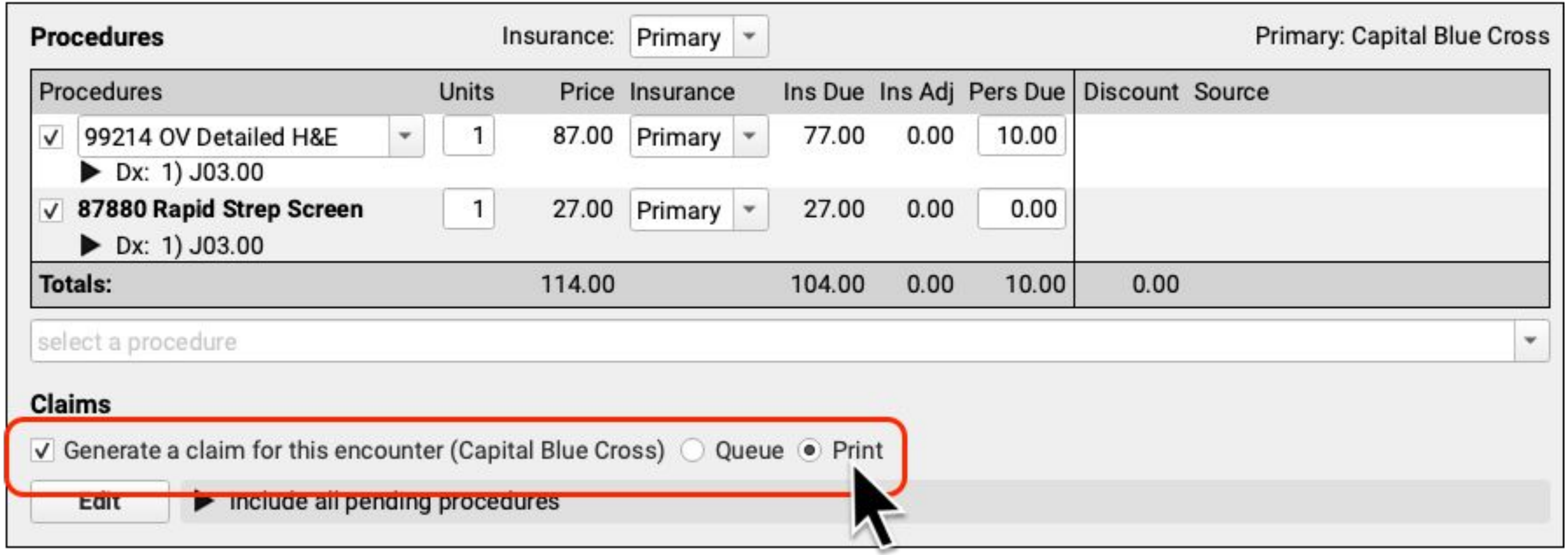
Search Filter:

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	

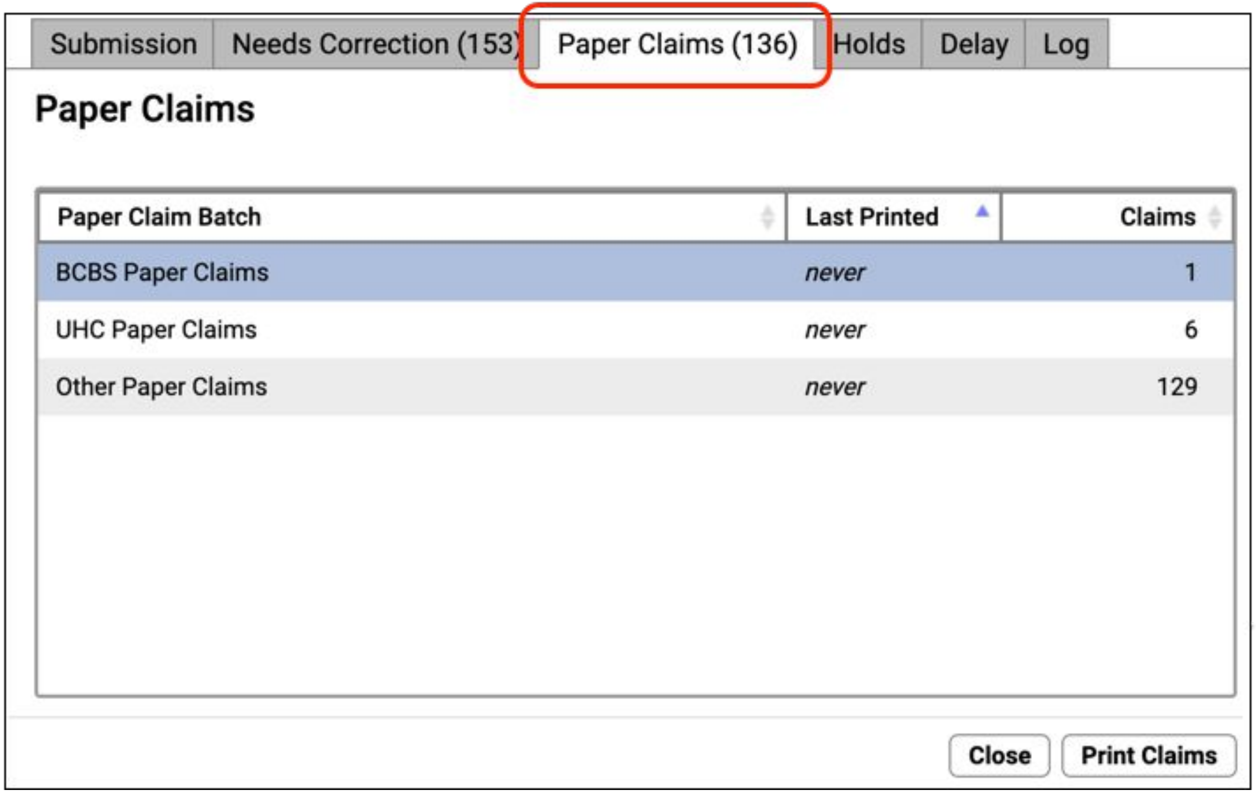
9 Accounts

Prepare Paper Bills | Mark as Reviewed | Back | Open Account

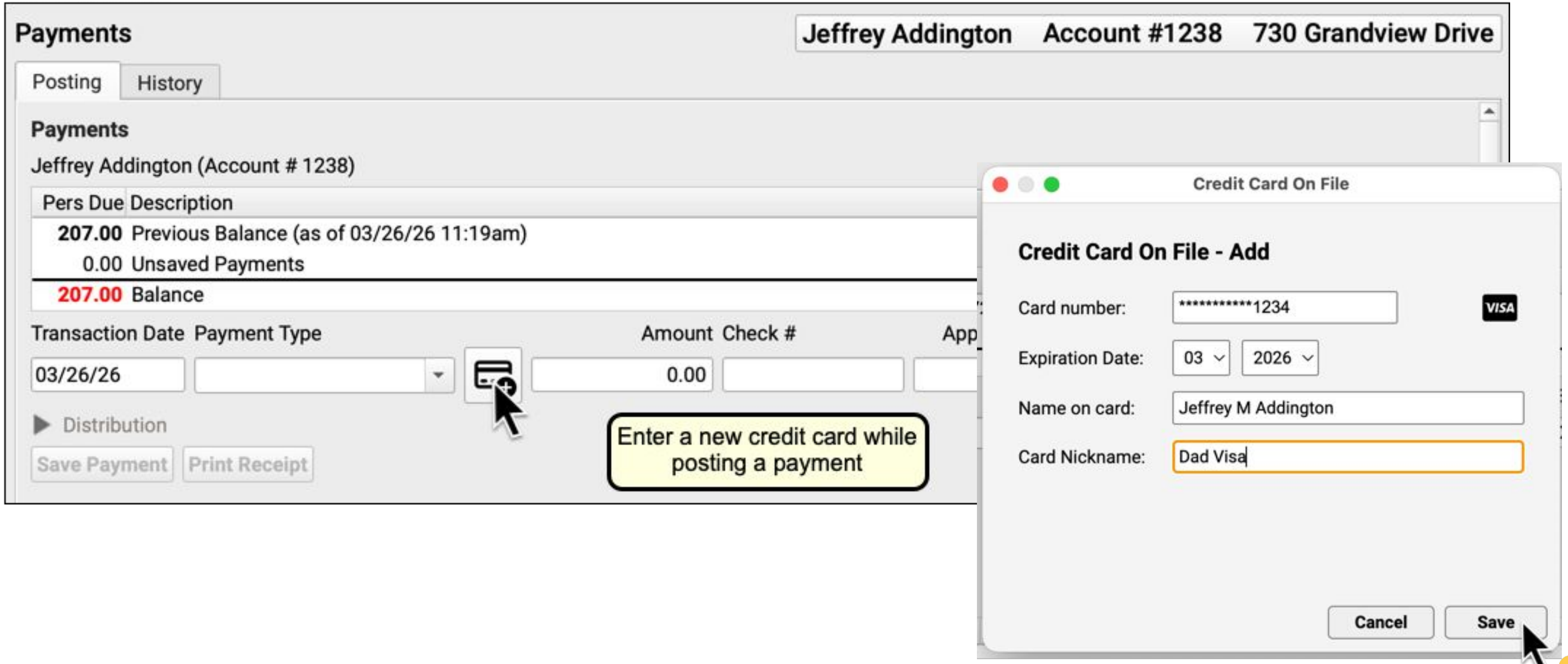
Print Individual Paper Claims



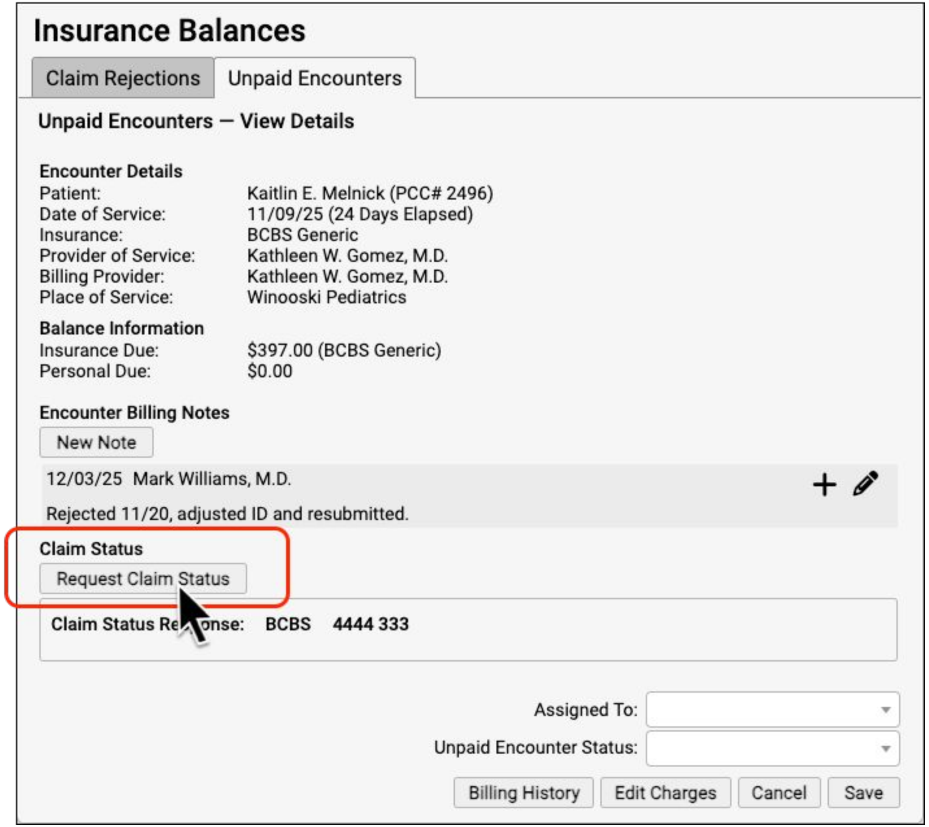
Print Paper Claim Batches



Credit Card on File



Real Time Claim Status



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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:	1 For more detailed information, see remittance advice.
Response Date:	10/02/25

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.

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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?

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