

# **Billing & Reimbursement**

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### **Overview: *Billing & Reimbursement***

This book has students use case studies to create billing situations for them to process. The example in the book steps the user through an encounter with multiple payers and multiple payments. The user records a payment from the primary payer that doesn't pay for each line item and partial pays the remaining line items. The user balance bills the secondary payer for the remaining unpaid line item. The secondary payer partially pays the remaining line item and credits the patient for a co-payment. Both the patient and the secondary payer overpay the remaining balance requiring the user to issue refunds to both of them.

### **Chapter 1 - *Billing and Reimbursement***

This chapter provides a description of the example case in this book and lists the major categories of clinical billing and reimbursement.

### **Chapter 2 - *Logging in to MedTrak***

This chapter introduces MedTrak and how to locate the MedTrak web site. The user then accesses the system using his assigned customer login user name and password. To enter the assigned location, the user enters his employee initials and password. The importance of password protection is emphasized, and the user learns to change and control his password.

### **Chapter 3 - *Adding Patients***

This chapter teaches the user how to add new patients to the MedTrak database. The initial process uses the social security number to distinguish between patients. The user is taught to use all 9's for the social security number, if the patient does not provide a social security number.

### **Chapter 4 - *Helpful Tips and Navigation***

This chapter utilizes the MedTrak User Guide located on the Main Menu. The user learns about the common screen elements, basic navigation for selecting items and entering commands, the use of selection boxes, expanded answers using the keyboard and voice recognition, picking items from a category list, basic searching, helpful tips, and frequently asked questions.

### **Chapter 5 - *Copying cases***

In this chapter, the user learns how to create a new patient's name that corresponds to the case study. Then the user will use the Copy command on that patient to create the case for billing and reimbursement processing.

### **Chapter 6 - *Unbilled Charges Dashboard***

The user learns in this chapter to process the unbilled charges for the patient encounters. This dashboard breaks down the visits by those that need additional information before posting and those that are ready for posting. Additional information is needed for visits that still need authorization from the payer or employer. The demographics log needs review to be sure that the demographic changes were correct. Otherwise, the provider needs to complete the history and exam portion of the patient's documentation for the visit. Once ready for posting, the user will learn how to review the unposted charges for validity, assign the correct diagnoses numbers to the line items, and post the charges to create an invoice.

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### Chapter 7 - Posting Charges to a Bill

In this chapter, the user learns how to post charges to create an invoice. Charges available for posting to an invoice are broken down by financial class to make it easier for the billing editor to work one financial class at a time.

### Chapter 8 - Printing Bills

In this chapter, the user learns how to use the Bills to Be Processed screen. This screen breaks down the bills by type of payer and type of transmission. Some bills will be printed and mailed, while others will be electronically transmitted to a clearing house. The user will locate the invoice that they created in the previous exercise and print it as part of their work product.

### Chapter 9 - Payment Processing

In this chapter, the user learns how a clinic receives payments for their services. Some payments are collected at the front desk at the time of service, and some payments arrive in the mail from patients, insurance companies, employers, and other payers. Users will learn to create a payment batch and add payments into the batch. They will also learn to post the payment(s) and any adjustments to the line items of the invoice that they created in a previous exercise.

### Chapter 10 - Accounts Receivable Aging

In this chapter, the user learns how to use the real-time Accounts Receivable Aging dashboard. The dashboard is broken down into two main sections – Debit A/R and Credit A/R. Users will learn to navigate the dashboard using the activity and follow-up filters and aging periods at the top of the screen.

### Chapter 11 - Collections

In this chapter, the user learns how to record collection activities in MedTrak. The user will record follow-up notes, set reminders for further contact with the payer, and attach foreign documents (EOB's, denial letters, etc.) to the chart. The user will also learn to use the Reminder processor to continue to pursue collection activity.

### Chapter 12 - Refunds

In this chapter, the user learns how to refund an over-payment, an unidentified payment, and a duplicate payment. The user will open up a new refund batch, create several refunds to include in the batch, close the batch for processing, and then post the checks written for the refunds to finish the refund batch.

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### **Chapter 13 - Cases Available to Copy**

This section of the book contains the case studies that the students can copy to create the billing and reimbursement situations.

#### **Ambulatory Clinic**

##### **Patient Responsibility**

- UTI – self pay
- Left Ear Pain – Blue Cross / Blue Shield
- Abdominal Pain – Medicare is primary, Champus is secondary

##### **Employee Health**

- Annual physical for an employer
- Drug screen only visit for an employer

##### **Worker's Compensation**

- Laceration right little finger with initial injury drug screens
- Lower back pain

#### **Physician's Office**

##### **Patient Responsibility**

- Sore throat and cough – Humana
- Sports physical – self pay

#### **Emergency Department**

##### **Patient Responsibility**

- MVA – multiple injuries - Cigna
- Dog bite left arm - Aetna

##### **Worker's Compensation**

- Right leg and knee pain