

BILLING QUICK REFERENCE



Billing Quick Reference	Notes
<ul style="list-style-type: none"><input type="checkbox"/> 1. Click Batches under the Billing Tab<input type="checkbox"/> 2. Select the appropriate batch you wish to process by clicking the hyper link<input type="checkbox"/> 3. Review the superbills one by one for errors<input type="checkbox"/> 4. Change each superbill status to "Ready to Submit"<input type="checkbox"/> 5. If there is a superbill in the list that is not ready to submit and you wish to hold it for a later submission, change the batch to a "Not Completed" batch (you may have to create a Not Complete batch by selecting "new")<input type="checkbox"/> 6. Once you have reviewed all the superbills "x" out of the superbill window.<input type="checkbox"/> 7. Go to Desktop>Reports>PM Reports>Run the "Daily Charges Trial Balance Report"<input type="checkbox"/> 8. Balance the report to your schedule for the day to be sure no appointments are missing superbills<input type="checkbox"/> 9. Once you are in balance, go to Batches and click the hyperlink to the batch you wish to complete. Click the complete check box and click okay	
<p>Submitting Primary Claims</p> <ul style="list-style-type: none"><input type="checkbox"/> 10. Go to Billing>Process Claims>Click the check box next to each superbill you wish to transmit. (if you wish to send all click the box at the top left with the check mark)>Click Process<input type="checkbox"/> 11. The window should appear and display a submission status. Once that is complete scroll to the far right to view any errors that might be linked to each superbill. Click the error hyperlink to view the errors.<input type="checkbox"/> 12. Correct each error then update the errors by clicking on the box next to the error then hitting update.<input type="checkbox"/> 13. Once all the errors are corrected reselect any superbills that have now been corrected (they will be in a "queued rejected primary" status) and click Process	
<p>Payerpath</p> <ul style="list-style-type: none"><input type="checkbox"/> 14. Once the claims have processed correctly, follow the payerpath steps to review your claims in payerpath.<input type="checkbox"/> 15. To download and update superbill statues, Go to Billing>Filing History>Download (click okay when error box appears stating "nothing was selected")<input type="checkbox"/> 16. Go to Billing> Superbill Reports to view and update errors<input type="checkbox"/> 17. Repeat the refiling process under Billing>Filing History> until you receive a status of "Succeeded Primary"	
<p>Submitting Secondary, Tertiary, or Quaternary Claims</p> <ul style="list-style-type: none"><input type="checkbox"/> 1. Repeat Steps 1-9.<input type="checkbox"/> 2. In the Process Claims window, change the claim insurance to secondary, tertiary, or quaternary.<input type="checkbox"/> 3. Repeat Steps 10-13	
<p>Printing Paper Claims</p> <ul style="list-style-type: none"><input type="checkbox"/> 1. Repeat Steps 1-9<input type="checkbox"/> 2. In the Process Claims window, change the Claim Format Type to Paper CMS 1500<input type="checkbox"/> 3. Click Claim Layout<input type="checkbox"/> 4. When prompted click search to find the type of claim you wish to print (example: 1500 w/ NPI or 1500w/o NPI or Medicare, etc)<input type="checkbox"/> 5. Click Okay<input type="checkbox"/> 6. Repeat Steps 10 - 13	