



Help Your Patients Understand A Balance Bill

✓ **Inquire Tab > check here first**

Notes button review

Subtab #5 Open Itemized – shows all payments to each line item

Account #: 10012COMP | John ChartMaker | Case: <All> | Practice: STI University Medical

Patient Information: 2700 Van Buren Avenue, Eagleville, PA 19403-2341 | Primary Home: (610) 777-7777 | DOB: 01/01/1960 | Birth Sex: M | Age: 58 | RP: <Multiple> | Primary Cell: (484) 555-8888 | SSN: 222-11-1111 | Mar: | All Acct #: | Primary Work: (484) 665-7777

1. Financial | 2. Patient Info | 3. Charges | 4. Payments | **5. Open Itemized** | 6. Appointments | 7. Collections | 8. Specialties | 9. Letters Sent | 10. Recalls

End Date	Case Type	Procedure	Charge	Due From	Who Paid	Date Paid	Allowed	Paid	Type	Balance	WriteOff	Code	Notes
06/06/2018	CMP	99214	210.00	HWC						210.00			
06/05/2018	CMP	99215	280.00	HWC						280.00			
02/10/2016	CMP	99214	210.00	HWC						210.00			
01/06/2016	NRM	99212	65.00	APPO						65.00			
01/06/2016	NRM	90658	18.00	APPO	Patient	01/06/2016	0.00	25.00	CC	40.00	0.00		
04/16/2012	NRM	99215	280.00	MCR						280.00			
				APPO		08/30/2016	200.00	140.00	AET	60.00	80.00	AET	

✓ **Inquire Tab**

Subtab #4 Payments > scroll over to Msg column, click “other” view

1. Financial | 2. Patient Info | 3. Charges | **4. Payments** | 5. Open Itemized | 6. Appointments | 7. Collections | 8. Specialties | 9. Letters Sent | 10. Recalls

Date Paid	Case ...	Procedure	Charge	Pay Action	Cont...	Bal Before...	Allowed	Deductible	Refund Type	Msg	Notes
08/30/2016	NRM	OFFICE/OUTPATIE...	280.00			280.00	200.00	0.00		Balance Due reflects the Co-In	
08/30/2016	NRM	I & D, P-SPINE, L/S/...	2000.00	Bill Patient Di...		2000.00	800.00	0.00		Balance Due reflects the Co-In	
08/29/2016	NRM	Credit	0.00			0.00	0.00	0.00			
08/29/2016	NRM	Credit	0.00			-25.00	0.00	0.00			
08/16/2016	NRM	OFFICE/OUTPATIE...	210.00		8/2/...	110.00	50.00	0.00			
08/16/2016	NRM	I & D, P-SPINE, L/S/...	2000.00			1000.00	0.00	0.00			
05/10/2016	NRM	OFFICE/OUTPATIE...	210.00	Bill Patient Di...	ck5/...	210.00	100.00	100.00		Applied towards deductible	
05/10/2016	NRM	I & D, P-SPINE, L/S/...	2000.00		ck5/...	2000.00	900.00	200.00			
01/06/2016	NRM	OFFICE/OUTPATIE...	65.00			65.00	0.00	0.00			
07/10/2015	NRM	INSERT CATHETER...	195.00		ck7/...	60.00	20.00	0.00			

Bottom of screen **check box** for descriptions of Msg

From Payment Date: 07/18/2010 | To Payment Date: 10/18/2018 | Find Now | Show Description | What's Changed

Subtab #4 Payments > click “Claim Adj” view

1. Financial | 2. Patient Info | 3. Charges | **4. Payments** | 5. Open Itemized | 6. Appointments | 7. Collections | 8. Specialties | 9. Letters Sent | 10. Recalls

Date Paid	Case Type	Procedure	Charge	Who	Amount Paid	WriteOff	Group	Reason	Amount	Qty	Charge Date	Notes
08/30/2016	NRM	99215	280.00	APPO	140.00	80.00	CO	45	80.00		04/16/2012	
							PR	3	10.00			
							PR	2	50.00			
08/30/2016	NRM	22015	2000.00	APPO	500.00	1200.00	CO	45	1200.00		04/16/2012	
							PR	2	300.00			
08/29/2016	NRM	CREDIT	0.00	Patient	25.00	0.00					08/29/2016	
08/29/2016	NRM	CREDIT	0.00	Patient	-25.00	0.00					08/29/2016	
08/16/2016	NRM	99214	210.00	APPO	50.00	50.00					03/12/2012	
08/16/2016	NRM	22015	2000.00	MCR	-200.00	200.00					03/12/2012	
05/10/2016	NRM	99214	210.00	MCR	0.00	100.00	CO	45	100.00		03/12/2012	

CO-45 Contractual adjustment

PR-1 Deductible **PR-2** Co-Insurance **PR-3** Copay **PR-96** Non-covered charge

✓ **Inquire Tab**

Subtab #3 Charges > scroll over to Msg column, click "billing" view

End Date	Case ...	Proc...	Charge	Encount...	1st Appr...	2...	Rev/...	Send OP ...	Hard Copy	Defer Ins Bill	Defer Pat Bill	Msg 1
06/05/2018	CMP	99215	280.00	10585				N	N	Y	Y	
08/29/2016	NRM	CREDIT	0.00	0				N	N	N	N	
02/10/2016	CMP	99214	210.00	10481				N	N	N	N	
01/06/2016	NRM	99212	65.00	10528				N	N	N	N	
01/06/2016	NRM	93000	0.00	10528				N	N	N	N	
01/06/2016	NRM	90658	18.00	10528				N	N	N	N	
01/06/2016	NRM	90466	0.00	10528				N	N	N	N	
06/03/2014	CMP	99214	210.00	10214				N	N	Y	Y	
02/27/2014	CMP	CREDIT	0.00	0				N	N	N	N	
04/16/2012	NRM	99215	280.00	10266				N	N	N	N	Balance Due reflects the C
04/16/2012	NRM	22015	2000....	10266				N	N	N	N	Balance Due reflects the C
03/12/2012	NRM	99214	210.00	10054				N	N	N	N	
03/12/2012	NRM	22015	2000....	10054				N	N	N	N	

✓ **Inquire Tab - Find history of patient bills**

Subtab #1 Financial > Billing History button

Change to Responsible Party if RP is on a case. Goal is to find last date billed – either to find copy of bill (on Patient Billing Tab) or explain how newest bill crossed in the mail if balance is different from last bill patient received.

Date Entered	Billing Date	Amount Billed	Monthly Balance
06/22/2018	06/22/2018	1328.00	
08/30/2016	08/30/2016	1028.00	
09/23/2015	08/06/2015	300.00	
06/03/2015	06/03/2015	30.00	
05/21/2015	05/21/2015	30.00	

✓ **Patient Billing Tab >** (to see copy of bill in question)

Reprint Paper Statement subtab > search date billed, click View Patients button – this shows each bill including notes on charges

Batch Name	Date Billed	Total Bills	Amount Billed	Operator	Date Entered	Advanced Selections
<input checked="" type="checkbox"/> IS #10012COMP	6/22/2018	1/2	1,328.00	pcadmin	6/22/2018 2:02 PM	
<input type="checkbox"/>	4/10/2018	0	0.00	pcadmin	4/10/2018 11:49 AM	
<input type="checkbox"/> IS #ICD1	11/17/2016	1/1	0.00	pcadmin	11/17/2016 9:44 AM	
<input type="checkbox"/> OFFICE	9/13/2016	16/24	5,064.00	pcadmin	9/13/2016 10:05 AM	

✓ **Next Steps if unclear >**

Message RCM Billing (To-Do, New Message) or call your RCM rep.

F8 to add patient name/acct to message

Completion Date: 7/10/2018

Message

Patient: 10012COMP John ChartMaker

Subject: DOS 4/15/18 patient confused

Hi Cindy- I explained to this patient about note showing the insurance doesn't cover this cpt code and I gave him the Blue Shield patient phone# he can call. Is there anything else we can do to help explain?
thanks!



STI can help!

Call for general “how to” question in the software:

Practice Manager Software Support:

800-487-9135 ext. 1, then ext. 1

ChartMaker Clinical Software Support:

800-487-9135 ext. 1, then ext. 2

Hardware at STI:

800-487-9135 ext. 2

(Scanner, monitor, server help)

Video web training on the software:

<http://sticomputer.com/resources/practice-manager/#videos>

<http://sticomputer.com/resources/clinical/#videos>

Private web training on the software (billable service):

Professional Services:

800-487-9135 ext. 1171, Barbara Lee, Manager, to schedule

Work with an outside billing service? (call for specific billing questions):

Your own rep _____ ext. _____

RCM Division of STI Computer Services **877- 698-1700**