Getting to Know the Billing Menu

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Billing Menu

1. Navigate to **Billing**

Tap on each **blue** title on each item below for additional information.

- **Billing Summary**: An overview of your financials comparing the current month to the previous, quarter-to-date to the previous, and year-to-date
- **Live Claims Feed**: A comprehensive way of viewing your claims and where they are in the RCM cycle
- **Patient Payments:** Displays a list of patients with an open balance and also provides the payment history for each patient
- **Financial Transactions**: Report to show you what has been posted (charges, insurance/patient payments, and insurance/patient adjustments) for a particular day or date range. You can specify other parameters, including the office and even the exam room.
- **Day Sheet**: Designed to provide a daily snapshot of your finances, detailing charges, credits/adjustments, and insurance/patient payments.
- **Transactions**: Provides an appointment-by-appointment view detailing the diagnostics, services, inventory code used, quantities, amount billed, adjustments, insurance paid, and patient paid.
- **Remittance Reports**: Tracks your electronic ERAs and paper EOBs
- **Unposted ERA Transactions**: If there is a response from the payer on an ERA that cannot be matched to an appointment, it will post here. They could be appointments billed out of a different/previous system.
- **Insurance Credit Card Payments**: A place to process and store insurance payments made via virtual credit cards
- **Aging AR Analysis**: A summary of outstanding insurance and patient receivables
- **Patient Statements**: Displays a detailed view of patient payments and balances, focusing on generating and tracking statements.
- **Product/Procedure**: Tracks the products and services you have billed to your patients/payers, as well as the associated statistics (units, charges, insurance, patient payment, and adjustments).
- **Patient Balance Ledger**: Views the combined insurance + patient payment to see how it contributes to the bottom line.
- **Fee Schedule**: This allows you to set up your services and the prices associated with them
- **Underpaid Items**: Will document instances of underpayment by a payer if the expected reimbursement amount is loaded into the fee schedule with the payer ID.
- **Adjustment Master**: An easy way to view and manage the adjustments on your claims.
- **Sales Tax**: Allows you to track prices pre- and post-taxes and the tax amount paid.
- **Billing Log**: A complete log of billing changes, including changes your staff members have made.
- **Enrollment**: A portal that allows the requesting of EDI and ERA enrollments to the eProvider Solutions (ePS) clearinghouse.