



Helper Tips and Tricks Volume 2

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Billing Ledger

Does your billing ledger have years of bills in the “Ready to Send” section? You can use the “Move a Batch of Charges” utility to remove them from the Ready to Send tabs. **Before running this utility, you should have all your current billing completed.**

Ready to Send Sent Closed

Balance Due 0.00

Move a Batch of Charges

Date	Patient	Billable Party	Service	Method	Total Billed	BP Amount	Bill/Claim #	Batch Number	Orig Sent Date	Last Sent Date	Insured's ID
1/1/2016	William J G	(Inactive Ins) Blue Cross Blue Shield of	Individual F	ClaimsConnect	\$50.00	\$50.00	NA	NA			123456789
1/1/2016	William J G	William J Gallagher	Individual F	Standard Statement	\$50.00	\$0.00	NA	NA	5/17/2018	5/17/2018	
1/1/2016	William J G	(Inactive Ins) Medicare	Individual F	ClaimsConnect	\$50.00	\$0.00	NA	NA			1111111111
1/8/2016	William J G	(Inactive Ins) Blue Cross Blue Shield of	Individual F	ClaimsConnect	\$80.00	\$80.00	NA	NA			123456789
1/8/2016	William J G	William J Gallagher	Individual F	Standard Statement	\$80.00	\$0.00	NA	NA	5/17/2018	5/17/2018	
1/8/2016	William J G	(Inactive Ins) Medicare	Individual F	ClaimsConnect	\$80.00	\$0.00	NA	NA			1111111111
1/22/2016	William J G	(Inactive Ins) Medicare	Individual F	ClaimsConnect	\$110.00	\$110.00	NA	NA			1111111111
1/22/2016	William J G	William J Gallagher	Individual F	Standard Statement	\$110.00	\$0.00	NA	NA	5/17/2018	5/17/2018	
1/22/2016	William J G	(Inactive Ins) Blue Cross Blue Shield of	Individual F	ClaimsConnect	\$110.00	\$0.00	NA	NA			123456789
2/16/2016	William J G	(Inactive Ins) Medicare	Individual F	ClaimsConnect	\$64.90	\$64.90	NA	NA			1111111111
2/16/2016	William J G	(Inactive Ins) Blue Cross Blue Shield of	Individual F	ClaimsConnect	\$64.90	\$0.00	NA	NA			123456789

Use the mouse to click on Move a Batch of Charges. On the pop-up screen choose next.

Move Action

Move from Ready to Send to Sent or Closed

Add to Ready to Send from Sent or Closed

Make sure “Move from” is selected and click Next

Select individual charges to move by checking or unchecking the boxes at the top of the list. Click a column title to sort the list.

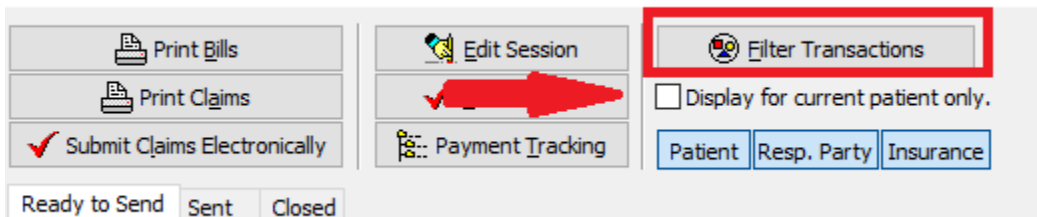
Print Check All Un-Cl

	Date	Patient	Billable Party	Service
<input checked="" type="checkbox"/>	7/28/2021	Steven ...	Empire - Secondary	Psytx cr...
<input checked="" type="checkbox"/>	7/28/2021	Steven ...	Medicare - Primary	Psytx cr...
<input checked="" type="checkbox"/>	7/28/2021	Richard ...	Richard Sousa	Psytx cr...
<input checked="" type="checkbox"/>	7/28/2021	Richard ...	Blue Cross Blue Shield of Kansas Cit...	Psytx cr...
<input checked="" type="checkbox"/>	7/28/2021	Richard ...	Medicare of KS - Secondary	Psytx cr...
<input checked="" type="checkbox"/>	7/30/2021	William ...	William J Gallagher	Psytx cr...
<input checked="" type="checkbox"/>	7/30/2021	William ...	Medicare of KS - Primary	Psytx cr...
<input checked="" type="checkbox"/>	7/30/2021	William ...	Rob Gallagher - Resp. #1	Psytx cr...
<input checked="" type="checkbox"/>	8/3/2021	William ...	William J Gallagher	Psytx cr...
<input checked="" type="checkbox"/>	8/3/2021	William ...	Medicare of KS - Primary	Psytx cr...
<input checked="" type="checkbox"/>	8/3/2021	William ...	Rob Gallagher - Resp. #1	Psytx cr...

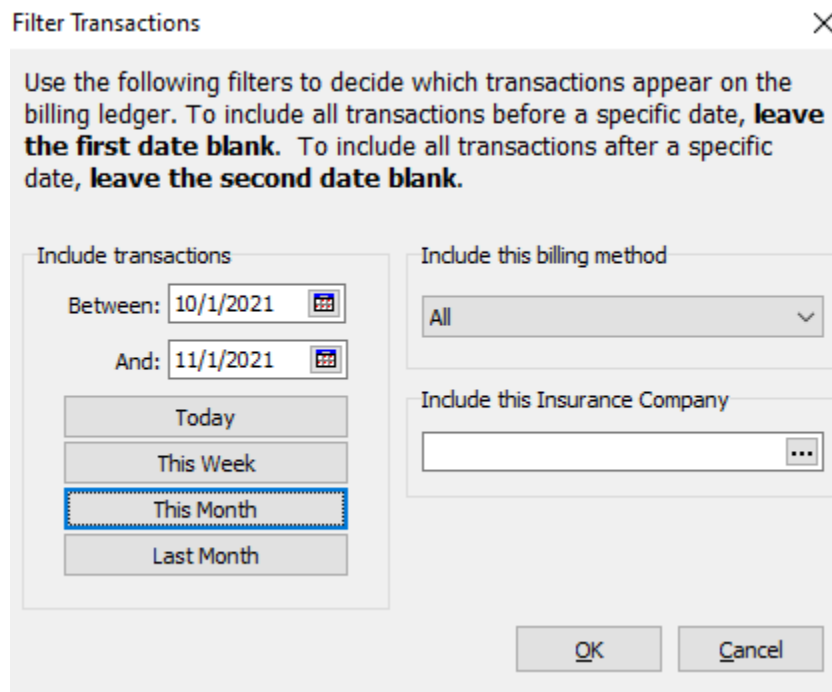
This screen will list everything that is in “Ready to Send”. You can scroll to the bottom and deselect any sessions you wish to keep. Then click next and complete the utility.

Also, on the billing ledger you can use Filter Transactions to find claims. You can use this utility to check what claims had been sent in a date range. First, uncheck the box for “Display for current patient only”. Then click on Filter Transactions.

➔ Billing Ledger: William J Gallagher



On the Filter Transactions screen, you can choose the date range, billing method and insurance company. Once you have made your selections, click on Ok

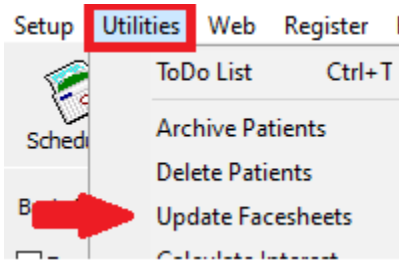


The billing ledger will be displayed. Click on the Sent tab. The screen will now display all sessions that were sent in the date range selected.

Date	Patient	Billable Party	Service	Method	Total Billed	BP Amount	Bil/Claim #	Batch Number	Orig Sent Date	Last Sent Date	Insured's ID
2/8/2021	David Z Kin	David Z King	tele Psytx ;	Batch Move To Sent,	\$110.00	\$20.00	NA	256			
2/8/2021	David Z Kin	(Inactive Ins) Medicare of KS	tele Psytx ;	Batch Move To Sent,	\$110.00	\$90.00	NA	256			U123456
2/18/2021	David Z Kin	David Z King	tele Psytx ;	Batch Move To Sent,	\$110.00	\$20.00	NA	256			
2/18/2021	David Z Kin	(Inactive Ins) Medicare of KS	tele Psytx ;	ClaimsConnect	\$110.00	\$90.00	Y5100MJ	233	2/18/2021	2/18/2021	U123456
2/23/2021	David Z Kin	David Z King	tele Psytx ;	Batch Move To Sent,	\$110.00	\$20.00	NA	256			
2/23/2021	David Z Kin	(Inactive Ins) Medicare of KS	tele Psytx ;	ClaimsConnect	\$110.00	\$90.00	Y5600N4	243	2/23/2021	2/23/2021	U123456
2/23/2021	David Z Kin	(Inactive Ins) Medicare of KS	Psychologic	ClaimsConnect	\$25.00	\$25.00	Y5600N4	243	2/23/2021	2/23/2021	U123456

Updating fees

If you need to update your session fees, here are the steps. First, go to utilities at the top of Helper.




From the drop-down, select "Update Facesheets". Then click on Next

Select the steps you would like to complete

- General patient information**
View options for updating patient Library Links, default diagnosis, "Who will be billed" percentages and other general fields. This does not affect any transactions or claims that already exist.
 - When a Therapist leaves the group you can assign those patients to a new Therapist.
 - When a patient turns eighteen, change the percentage billed to the responsible party to 0%, shifting the charge to the patient.
- Billing methods**
View options for updating the billing method used by each billable party. This affects the Facesheet as well as any transaction on the "Ready to Send" tab of the "Billing Ledger".
 - You have decided to begin using SecureConnect and you want to update all patients from using the paper 1500 claim form to SecureConnect.
- Standard fees**
View options for updating the standard fee found under the "Billing Setup" section of the Facesheet. This does not affect any transactions that already exist.
 - You are doing a yearly increase of \$5 for each Service.

The next screen will display your patient list. If you are updating a single service code, click on "Select groups of patients to update".

 **Select groups of patients to update** Then review and refine the list of selected patients

Select All Deselect All

Drag a column header here to group by that column

Include	Account #	Last Name	First Name	MI	DOB	Therapist	Service
<input checked="" type="checkbox"/>	V	Diagnosis	Test			Chris Newman, PhD	90840, Psytx crisis ea addl 30
<input checked="" type="checkbox"/>	S	Dover	Liz		1/1/1970	Jack Ryan, PhD	90840, Psytx crisis ea addl 30
<input checked="" type="checkbox"/>	A	Gallagher	William	J	1/1/1960	Jack Ryan, PhD	90840, Psytx crisis ea addl 30
<input checked="" type="checkbox"/>	AR	King	David	Z	12/28/1966	Jack Ryan, PhD	90840, Psytx crisis ea addl 30
<input checked="" type="checkbox"/>	AF	Pest	Alf			Chris Newman, PhD	90840, Psytx crisis ea addl 30

On the following screen, click on Library Links. Next to Standard Service, enter the service code you want to update. Click OK.

Billing Parties Billing **Library Links** Dates

Select patients that have the following **library links** setup in their **facesheet**.

Select patients with the following

Account: ...

Facility: ...

Lawyer: ...


Program: ...


Referring Source: ...

Standard Service: ←

Therapist: ...

Insurance: ...

 Select specific patients

 Clear

OK

You will see a list of patients that have that service code on their facesheet. Click on Next.

<input checked="" type="checkbox"/>	AR	King	David	Z	12/28/1966	Jack Ryan, PhD	90840, Psytx crisis ea addl 30
<input checked="" type="checkbox"/>	AF	Pest	Alf			Chris Newman, PhD	90840, Psytx crisis ea addl 30
<input checked="" type="checkbox"/>	C	Reed	Steven		1/1/1950	Chris Newman, PhD	90840, Psytx crisis ea addl 30
<input checked="" type="checkbox"/>	AJ	Smith	Bob		12/28/1966	Chris Newman, PhD	90840, Psytx crisis ea addl 30
<input checked="" type="checkbox"/>	B	Sousa	Richard		1/1/1980	Chris Newman, PhD	90840, Psytx crisis ea addl 30
<input checked="" type="checkbox"/>	F	Test	Test			Chris Newman, PhD	90840, Psytx crisis ea addl 30

< >

Enter your new fee in the following screen. Click Next.

Enter a new fee or an amount to increase the existing fee. The fee is located on the Facesheet, Billing Setup, Defaults page, Session tab and is used as a default when adding new Sessions. If this tab is not visible, go to Setup, Preferences, Screens & Sounds to enable it.

Change the fee to OR

Increase the fee by OR

Decrease the fee by

Remember to adjust the fees found in the Service Library as well. The fees in the Service Library are used as defaults when adding new Patient Facesheets.

Finally, click on update the selected patients. After this is complete, all new sessions will use the new fee.

Submitting Claims using ClaimsConnect

There are ways to use filters when submitting claims to select date range, billable parties, or provider. From the billing ledger, click on “Submit Claims Electronically”. This will bring up a list of claims ready to be submitted.

On this window, at the top of each column is the column title. If you move the mouse to hover over a title, that will bring a drop-down list. Select the items by which you want to filter. For example, click the down arrow next to “Billable Parties”. It will list all the payers. Check each one you wish to submit.

Select All Deselect All

Drag a column header here to group by that column

Include	Date	Patient	Billable Party	Service	Billed	BP Amount	Therapist
<input checked="" type="checkbox"/>	12/19/2019	D	(All)	Individual Psychotherap	\$110.00	\$0.00	Chris Newma
<input checked="" type="checkbox"/>	7/8/2021	D	(Custom...)	Psytx crisis ea addl 30 m	\$90.00	\$90.00	Jack Ryan, Pl
<input checked="" type="checkbox"/>	7/13/2021	D	<input type="checkbox"/> (Inactive Ins) Blue Cross Blue Shield of	Psytx crisis ea addl 30 m	\$100.00	\$75.00	Jack Ryan, Pl
<input checked="" type="checkbox"/>	7/14/2021	D	<input type="checkbox"/> (Inactive Ins) Medicare	Psytx crisis ea addl 30 m	\$90.00	\$90.00	Jack Ryan, Pl
<input checked="" type="checkbox"/>	7/27/2021	D	<input type="checkbox"/> (Inactive Ins) Medicare of KS	Psytx crisis ea addl 30 m	\$300.00	\$275.00	Jack Ryan, Pl
<input checked="" type="checkbox"/>	7/28/2021	B	<input checked="" type="checkbox"/> Blue Cross Blue Shield of Kansas City -	Psytx crisis ea addl 30 m	\$100.00	\$0.00	Chris Newma
<input checked="" type="checkbox"/>	7/28/2021	R	<input type="checkbox"/> Empire - Secondary	Psytx crisis ea addl 30 m	\$100.00	\$40.00	Chris Newma
			<input type="checkbox"/> Medicare - Primary	8 Procedures	\$1,000.00	\$614.00	
			<input type="checkbox"/> Medicare of KS - Primary				
			<input type="checkbox"/> Medicare of KS - Secondary				

(Billable Party = Blue Cross Blue Shield of Kansas City -)

Transmit Data Now

Each column will work the same way and you can choose filters for multiple column filters. Once you have made your choices, click on Transmit data now. Your selected claims will be sent.