Helper Tips and Tricks Volume 2

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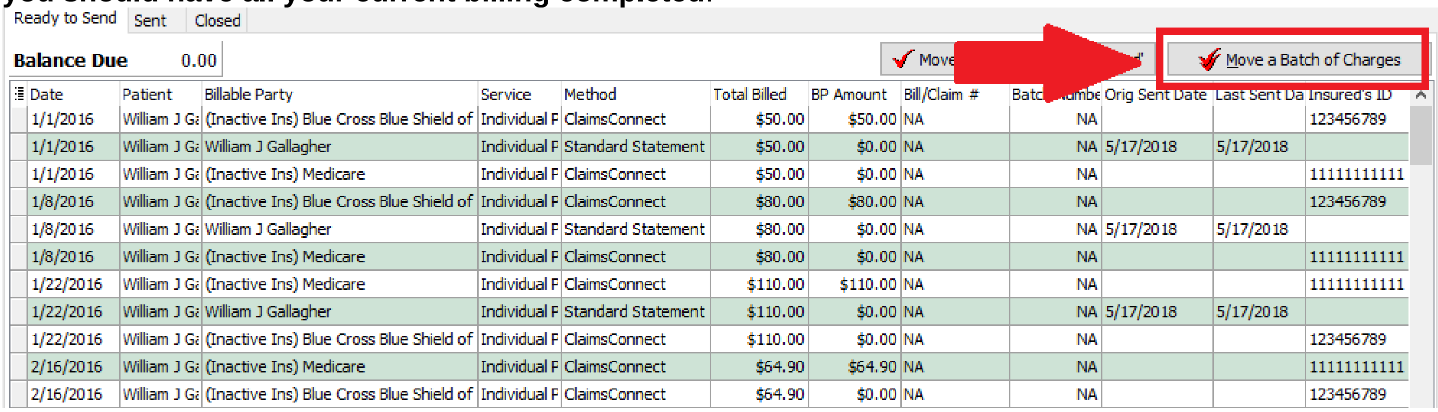
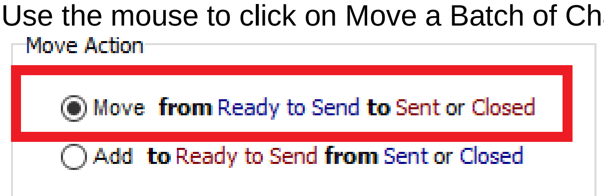
Billing Ledger

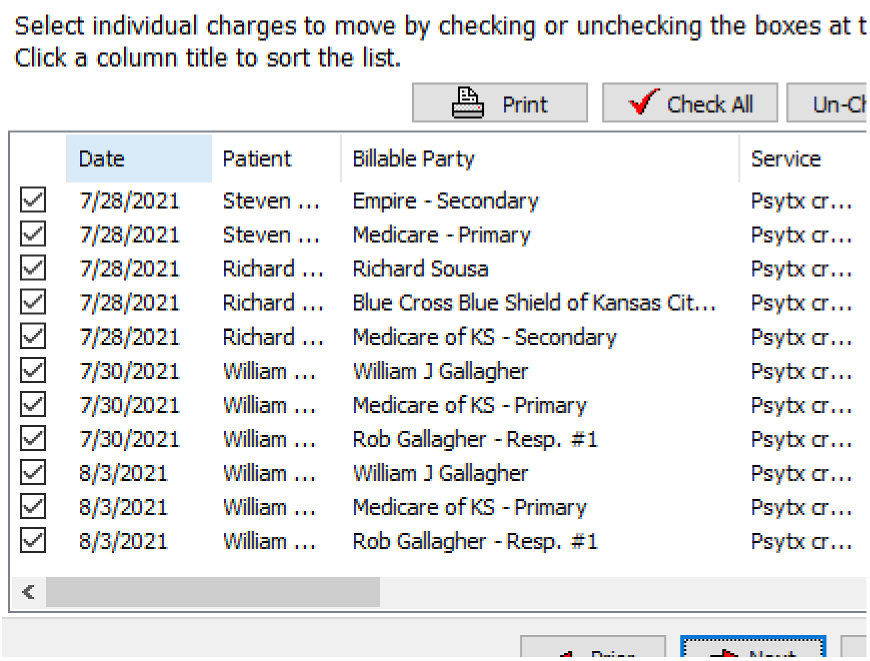
Does your billing ledger have years of bills in the “Ready to Send” section? You can use the “Move a Batch of Charges” utility to remove them from the Ready to Send tabs**. Before running this utility, you should have all your current billing completed**.



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



Make sure “Move from” is selected and click Next



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.

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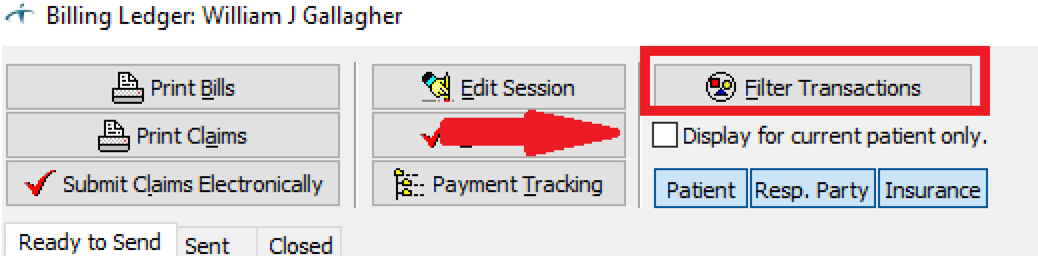
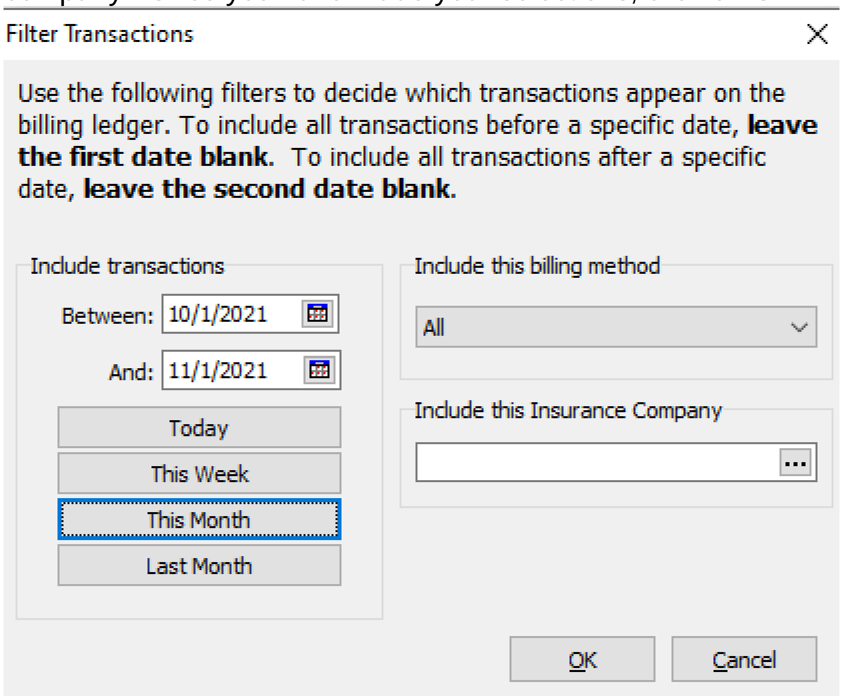
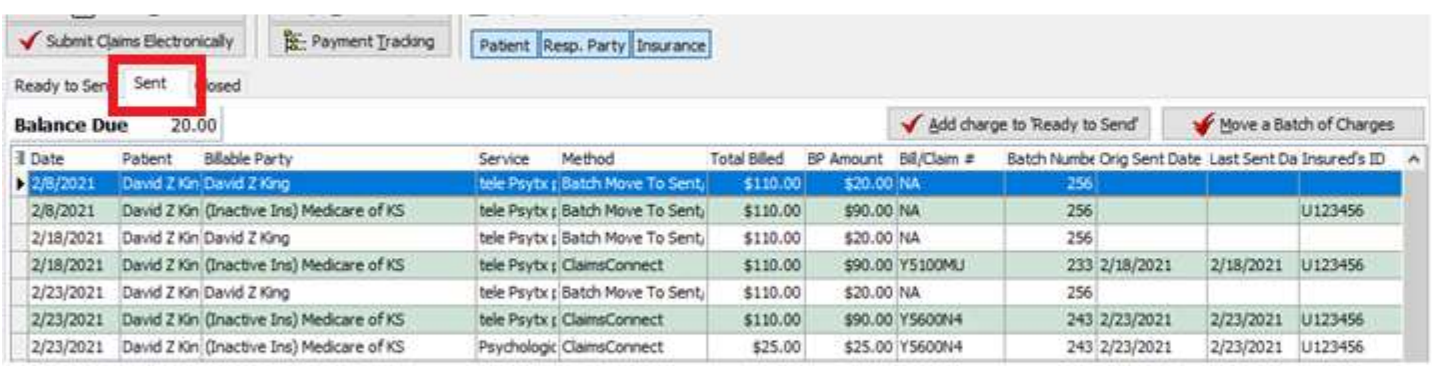
Also, on the billing ledger you can use Filter Transactions to find claims. You can use this utility to check what claims had been sent in a date range. First, uncheck the box for “Display for current patient only”. Then click on Filter Transactions.



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



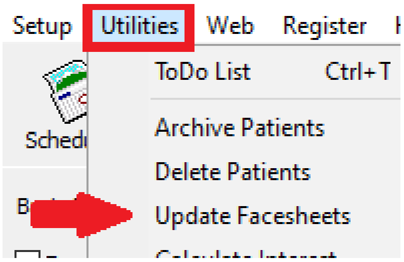
The billing ledger will be displayed. Click on the Sent tab. The screen will now display all sessions that were sent in the date range selected.



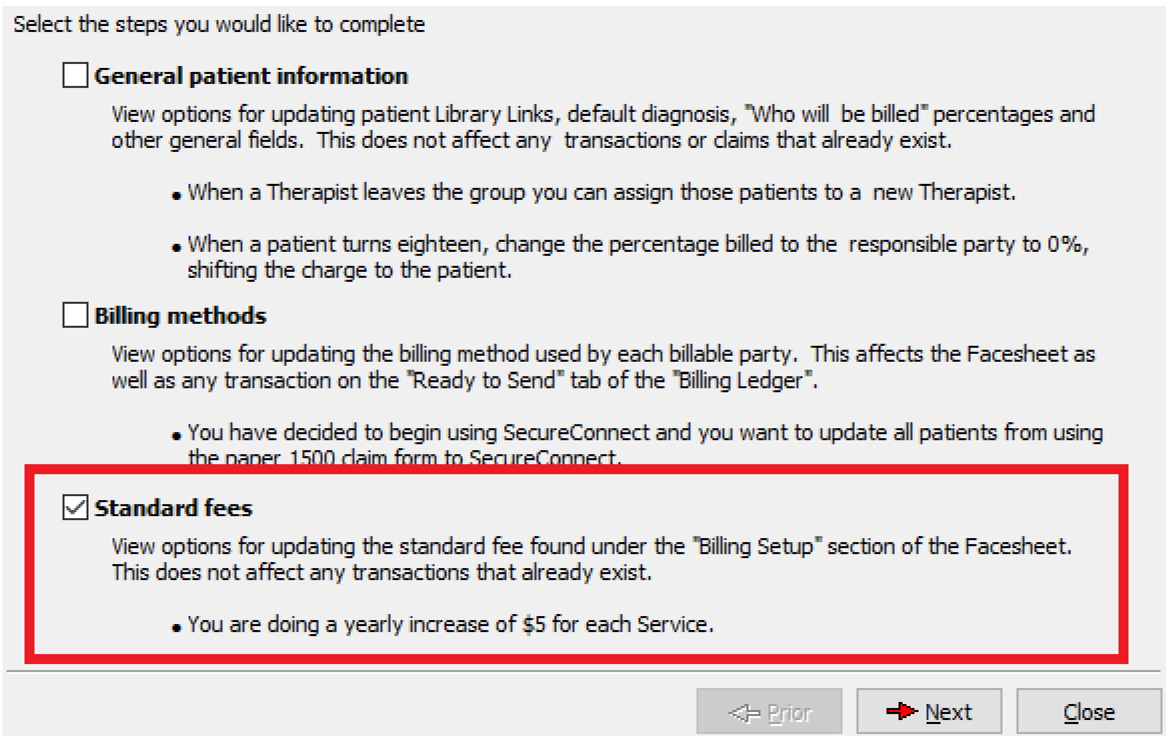
Date	Patient	Billable Party	Service	Method	Total Billed	BP Amount	Bill/Claim #	Batch Numbe	Orig Sent Date	Last Sent Da	Insured's ID
2/8/2021	David Z Kin	David Z King	tele Psytx ;	Batch Move To Sent,	$110.00	$20.00	NA	256			
2/8/2021	David Z Kin	(Inactive Ins) Medicare of KS	tele Psytx ;	Batch Move To 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	Y5100MU	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

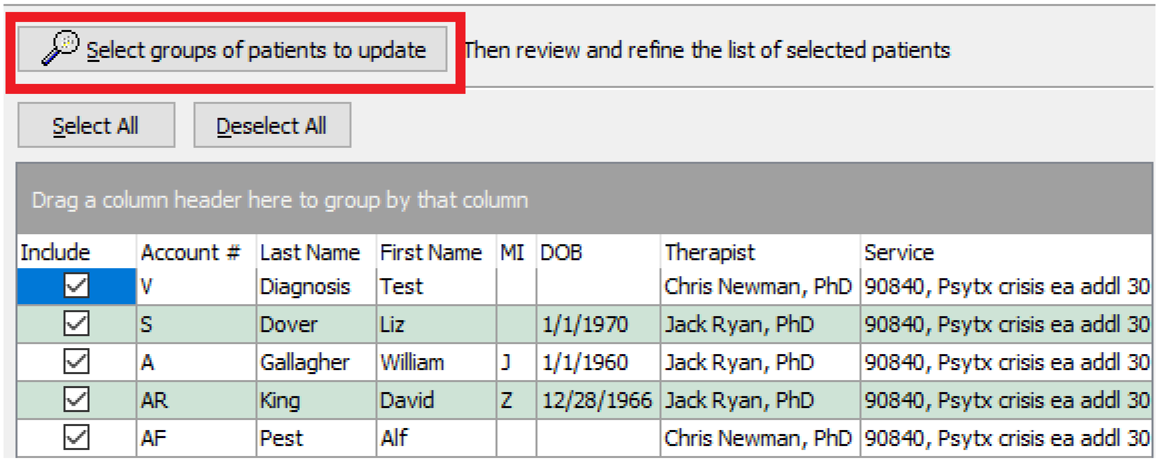
If you need to update your session fees, here are the steps. First, go to utilities at the top of Helper.



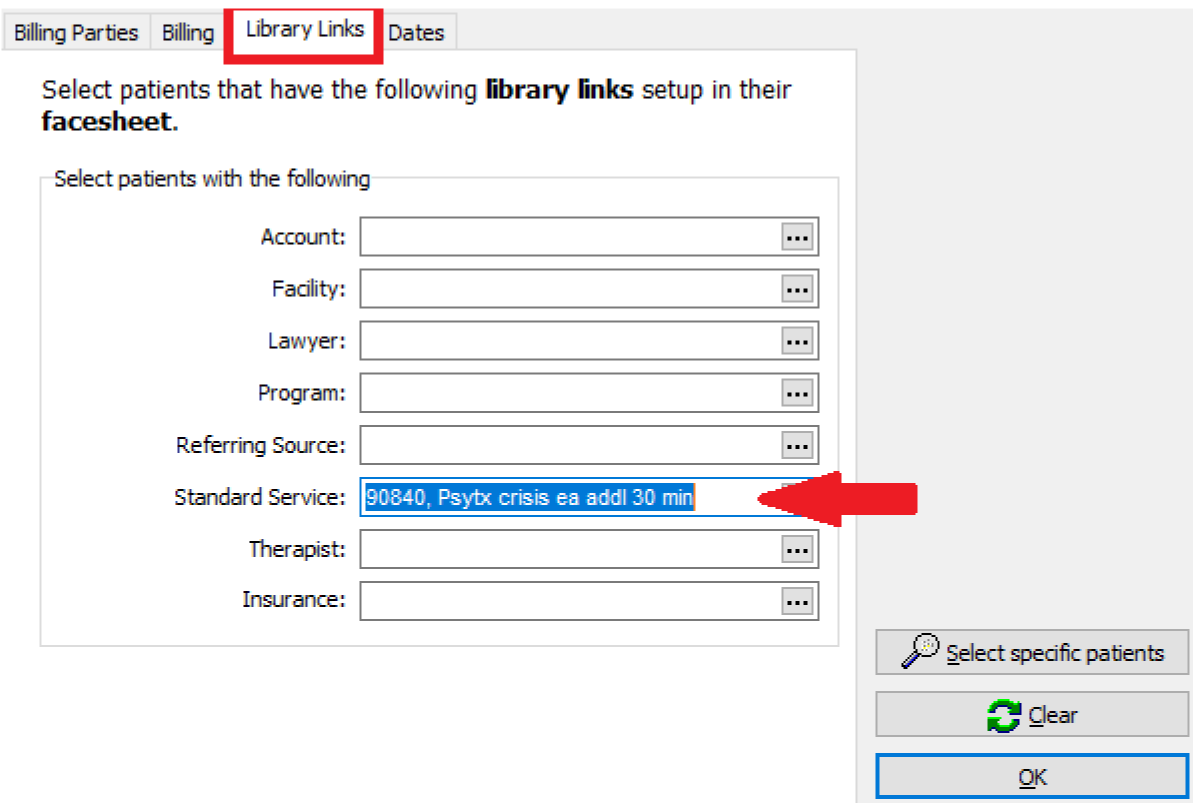
From the drop-down, select “Update Facesheets”. Then click on Next



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



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



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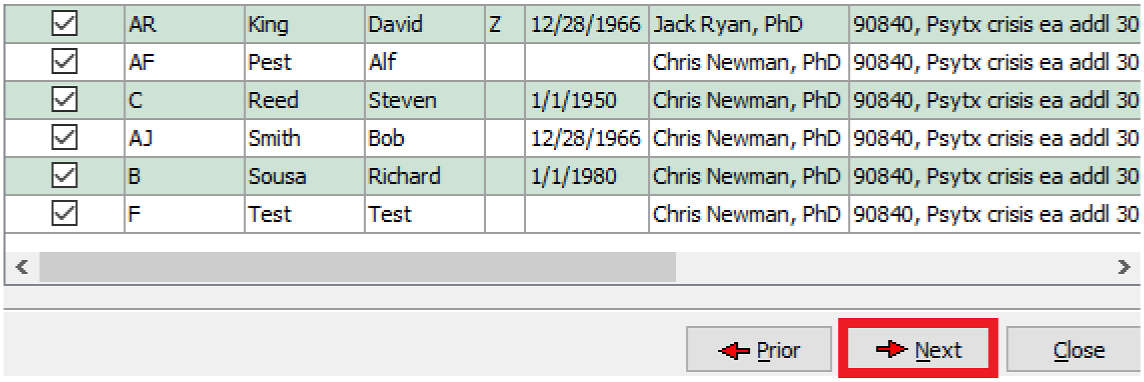
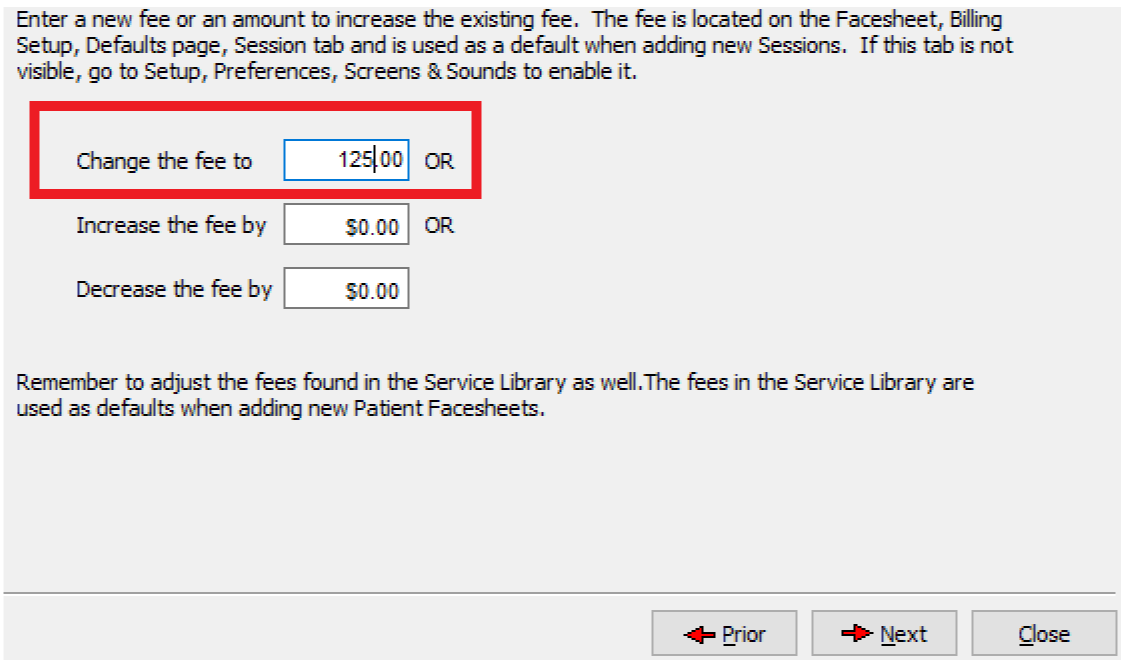
You will be see a list of patients that have that service code on their facesheet. Click on Next.



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

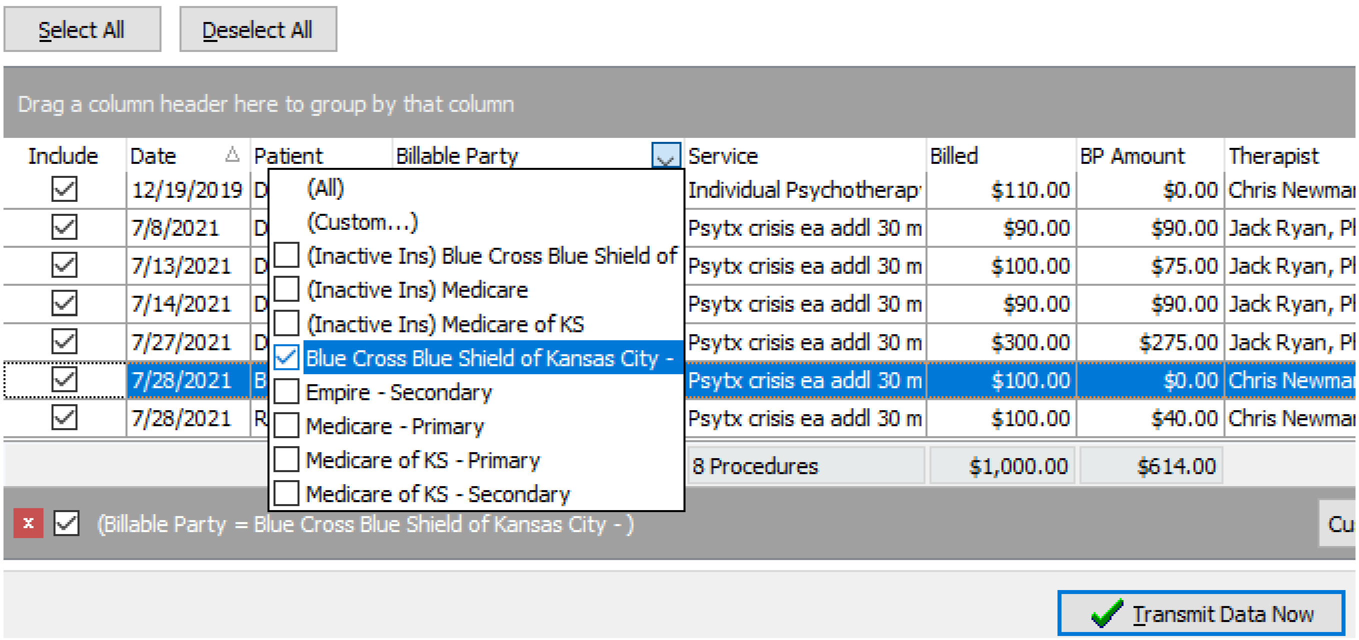


Finally, click on update the selected patients. After this is complete, all new sessions will use the new fee.

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.



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.

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