Verify All Appointments Have Charges Posted

Last Modified on 02/04/2021 2:57 pm EST

Version 14.19

Overview

There are two reports you can view to ensure all appointments have charges posted:

- **Show Blank Billing Status report**
- **Unbilled Charges for Scheduled Appts report**

Using these features will allow for a check and balance for missing electronic superbills or charges being captured for each patient visit.

Show Blank Billing Status

This report is run directly from the Calendar and returns all scheduled patients with appointments that have no Billing Status indicated in **Tracking**.

1. Navigate to the **Tracking** view of the desired schedule.
2. Select the checkbox to **Show Billing Panel**, if not already selected.
3. At the top of the panel, select the number of **Days since today** to check for blank billing statuses. This radio button defaults to **7**.
4. Click the **Show Blank Billing Status** button. Appointments with no billing status are displayed on the left side of the window. The total number of appointments shows in parentheses for each provider.
5. Determine the reason that the visit was not billed. Once the reason as to why the visit was not billed is clarified, select the appropriate billing status (**Superbill Exist, Completed, No Show, or Cancelled**) to reconcile the appointment. Once the **Billing Status** is selected, the appointment will be removed from view as it no longer has a blank Billing Status.

Unbilled Charges for Scheduled Appts Report

The report shows scheduled appointments for patients that do not have an associated superbill or charge transaction for a specific appointment date.

1. Navigate to **Billing tab > Transaction button > Standard Billing Reports**
2. From the **Choose a report...** drop-down, select **Unbilled Charges for Scheduled Appts**
3. Enter a date range in the **Reference date** fields.
4. Click **Refresh**. The grid displays with appointments that do not have charges billed for the respective date of service.

Version 14.10

Overview

The steps below help to ensure every patient on the schedule has charges posted if they were seen.

## Verify all Appointments have Charges Posted

There are two methods to ensure all appointments have charges posted. Incorporating the utilization of these features will allow for a check and balance for missing electronic superbills or charges being captured for each patient visits.

Method A: Show Blank Billing Status This returns all scheduled patients with appointments that have no Billing Status indicated in the **Tracking** tab.

1. Click on the **Schedule** button to open the **Schedule and Practice Workflow** window.
2. Click on the **Tracking** tab ![Tracking icon] Tracking .
3. Click the **Show Billing Reconciliation** check box, located at the top of the window. This will cause the Billing Reconciliation window to appear.
4. Locate the row of radio buttons at the top and click to select your reporting criteria **7 days, 30 days, 90 days, or 180 day** It is recommended so select **180 days** in order to reconcile all of your appointments within the last 6 months.
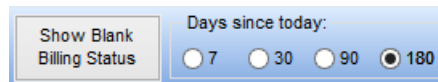
5. Once the selection has been made, click the **Show Blank Billing Status** button.
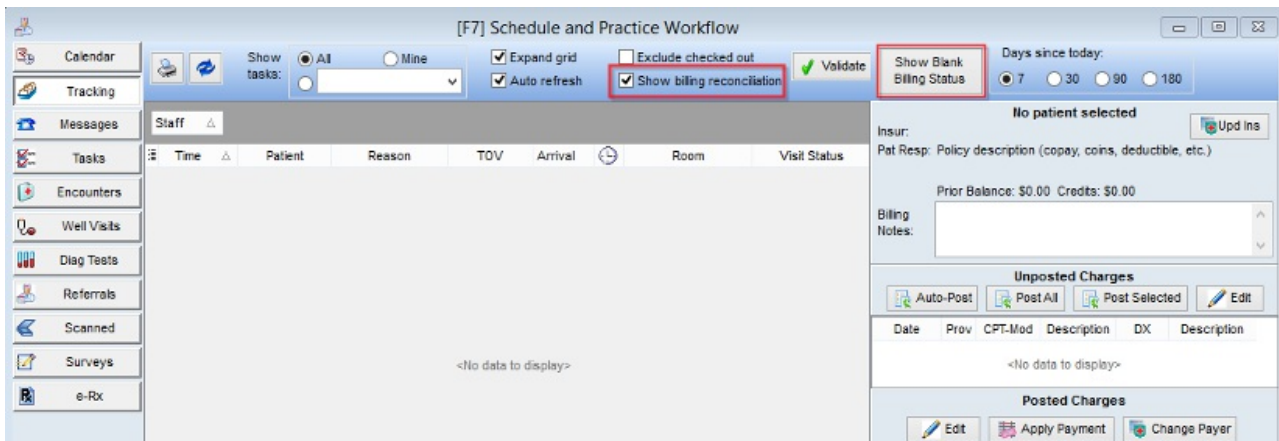
6. On the left side of the window each of the providers who have unreconciled appointments will appear along with the total amount of unreconciled appointments in parentheses.
7. Click on the **plus sign** button to the left of a provider's name to expand the unreconciled appointments for that provider. The screen will now list the dates for these unreconciled appointments.
8. Click on the **plus sign** button to the left of the date to expand the name of the patient(s) with the unreconciled appointment.
9. You now need to determine the reason that the visit was not billed. Once the reason as to why the visit was not billed is clarified, select the appropriate billing status (**Superbill Exist, Completed, No Show, or Cancelled**) to reconcile the appointment.
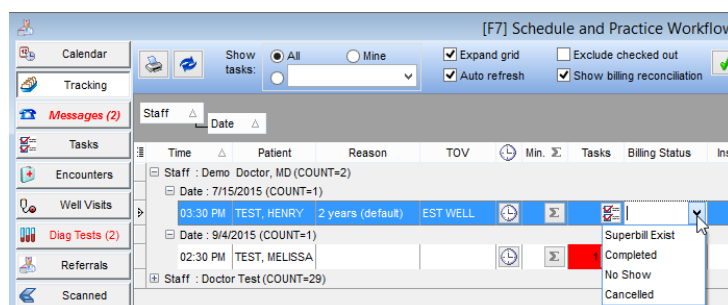
Method B: Unbilled Charges for Scheduled Appts report - This report is located under Reports menu - **Standard Reports**. The

report shows scheduled appointments for patients that do not have an associated superbill or charge transaction for the appointment date.
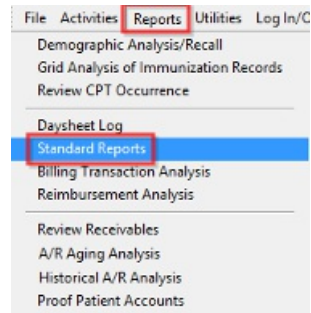
Select **Unbilled Charges for Scheduled Appointments** from the drop-down menu.