Accounts Receivable Navigation

Last Modified on 11/14/2019 2:06 pm EST

Version 14.19

Path: Billing tab > Billing Center button > Claims (A/R) tab

Overview

Accounts Receivable is most often worked from the Claims (A/R) tab of the Billing Center. Below, you will find instruction on how to navigate the Claims (A/R) tab to view and work on open claims for the practice.

1. Navigate to the Claims (A/R) tab of the Billing Center using the path above.
2. Select **All daysheeted claims (A/R)** from the Stage drop-down menu. To learn more about the other Stages in this drop-down menu, visit **The Different Claim Stages**.
3. Use the parameters listed below to isolate the view of specific claims:

   - **Payer:** Select one payer from the drop-down menu to view all outstanding claims for that payer only.
   - **Provider:** Select one provider from the drop-down menu to view all outstanding claims for that provider only.
   - **Date Range:** This is the Claim Date or Date of Service. Select either **7**, **30**, or **90** days or enter a custom date range.
   - **Location:** Defaults to **All**. For multi-location practices, select the radio button located next to All and select the location for which you would like to view claims.
   - **Category:** The Category shows the last status or acknowledgement that was applied to the claim.
   - **Batch #:** The Batch number is the claim file number assigned by OP when claim files are sent. By isolating a particular batch number, you can view all of the claims that were transmitted in the same batch. To locate a batch number for a claim, navigate to the claim's status history details. The Batch # is listed in the Payer Claim ID column on the Transmitted line. Additionally, in the Notes column, you will see Added to batch ......
   - **Who has a balance for the claim:Insurance**, **Patient**, or both.

☐ Has insurance balance   ☐ Has patient balance   Select the desired checkbox(es).

- **Show subtotals:** Select this checkbox to include the total number of claims, total of charges, total of Insurance balances, and total of patient balances at the bottom of the window.
- **Service lines:** Select this radio button to view the service lines for each claim after expanding each claim.
- **Status history:** Select this radio button to view the status history for each claim after expanding each claim.

> 💡 **Tip:** Click the column headers to sort the information in this table. For example, to view Claims from highest insurance balance to lowest, click the Ins Bal column header to toggle between ascending and descending order.

4. (*Optional*) Click the **Print Grid** button after setting the search parameters to print the grid.

Once you have viewed your open claims by searching with the above parameters, you can follow up on your claims more easily. To quickly access the chart of a patient on the grid, click the line with their claim and click the **Patient Chart** button in the **Clinical**, **Billing**, or **Practice Management** tab or use F8 on your keyboard to be taken to the patient's chart.

Version 14.10

Overview

You will learn how to navigate the Accounts Receivable for your practice in this article.

1. Click the **Billing** button on the Smart Toolbar to open the Billing Center.
2. Click the **Claims + A/R** tab on the left panel of the window.

> ℹ This tab displays all Claims that have unsettled balances (i.e. open claims; A/R). These are Claims that either have an insurance balance or a patient balance. In this tab, you can also post Claim payments, check real-time status on Claims (if supported), retrieve payer reports, and queue Claims.

3. Select **All daysheeted claims (A/R)** from the Stage drop-down menu. To learn more about the other Stages in this drop-down menu, visit **The Different Claims+AR Stages**.
4. Using the parameters listed below, you are able to isolate the view of your Claims depending on what you would like to see. You can isolate by:

- Who has a balance for the claim: Insurance, Patient, or both.
    ☐ Has insurance balance   ☐ Has patient balance   Select the desired checkbox(es).

- **Category:** The Category of a Claim shows the last status or acknowledgement that was applied to the claim.
- **Batch #:** The Batch number is the claim file number assigned by OP 14 when claim files are sent. By isolating a particular batch number, you can view all of the Claims that were transmitted in the same batch. To locate a batch number for a Claim, navigate to the claim's status history details. The Batch # will be listed in the Payer Claim ID column on the Transmitted line. Additionally, in the Notes column, you will see Added to batch ......
- **Payer:** Select one payer from the drop-down menu to view all outstanding Claims for that payer only.
- **Provider:** Select one provider from the drop-down menu to view all outstanding Claims for that provider only.
- **Date Range:** The Claim Date or Date of Service. Select either 7, 30, or 90 days or enter a custom date range.
- **Location:** Defaults to All. For multi-location practices, click the greyed-out radio button located under All. Then, select the location for which you would like to view Claims .
- **Show subtotals:** Select this checkbox to include the total number of Claims, total of charges, total of Insurance balances, and total of Patient balances at the bottom of the window.
- **Service lines:** Select this radio button to view the service lines for each claim after clicking the small plus sign to the left of the claim number.
- Status history: Select this radio button to view the status history for each claim after clicking the small plus sign to the left of the claim number.

> **ⓘ** **Tip:** Click the column headers to sort the information in this table. For example, to view Claims from highest insurance balance to lowest, click the Ins Bal column header to toggle between ascending and descending order.

5. Click the **Print Grid** button after setting the search parameters that fit your needs to print the Claims + A/R grid.

Once you have viewed your open Claims by searching with the above parameters, you can follow up on your Claims more easily. To quickly access the account of a patient on the grid, click the line with their Claim and click the **Acct** button on the Smart Toolbar or use F12 on your keyboard to be taken to the patient's account.