Create and Work Billing Tasks

Last Modified on 07/26/2023 1:56 pm EDT

Version 21.1

About

Billing Tasks are created so that billing-related issues requiring follow-up are not overlooked and can be worked from the Tasks window in OP (**Billing tab > Tasks**). This makes it easy for Billing staff to focus on similar Tasks all at once without having to work from individual patient charts. In the sections below, you'll learn how to:

- Create Billing Tasks
- Work Open Billing Tasks from the Task Window
- Create Billing Tasks
- Work Open Billing Tasks from the Task Window

- Create Billing Tasks
- Work Open Billing Tasks from the Task Window
- Create Billing Tasks
- Work Open Billing Tasks from the Task Window

Create Billing Tasks

Billing-related Tasks are most easily created while completing your normal billing workflows. Regardless of where Task creation is initiated from, the steps to create the task are the same.

1. Navigate to where you'll be creating the Billing task from:

   - From the **Claims** section of the patient's chart, select the claim that requires follow-up and click the **Follow-up Task** button.
   - From the **Claims (A/R)** tab of the Billing Center, locate the claim that requires follow-up and click in the Claim Note field to access and click the **Task** button.
   - From the **Add Payments and Adjustments** window or the Bulk Payment Posting window, select the claim that requires follow-up and click the **Task** button located in the Claim note field.
   - From the **Adjudications** tab of the Billing Center, select the claim that requires follow-up and click the **Task** button located in the Claim note field.

2. In the Add Task window, review the defaults and make changes as needed or add additional information if necessary.

   - **Task Type**: Defaults to **A/R Followup**.
   - **Description**: The default description is "Follow-up (OP claim number, payer, and provider)". You can add information to this field, as needed. There is a character limit of 250.
   - **Special Instructions**: Enter instructions as needed. Some information you can consider adding here would be the Payer-assigned claim number or corrections that need to be made to the claim that you identified as you were creating the Task.
   - **Due Date**: Defaults to 2 weeks from the current date; can be changed as needed.
   - **Department**: Defaults to Billing; can be changed as needed.
   - **Staff**: No defaults, select an individual staff member to assign the task to as needed.
   - **ICD-10, CPT Code(s), Provider, and Insurance**: No defaults, complete this information as needed so that the staff member performing the follow-up has as much information as needed to complete the Task.
   - *For reference only*: The Insurance and Patient Balance for the selected claim are displayed in the Add Task window.

3. Click **Save & Close** to send the Task to the Department selected and close the window. Or, click **Add** to start the creation of a new Task and repeat Step 2 above to create another Task.

Work Open Billing Tasks from the Task Window

1. Navigate to the Task window: **Billing tab > Tasks button**.
2. Use the Scope options at the top of the window to determine what Tasks will be displayed in the Task grid.

   - **Date range**: Select the Due, Requested (created), Completed, or All radio button and enter a Date Range.
   - **Status**: Select the Status radio button and select **Not started** from the drop-down.
   - **Department**: Select the Department radio button and select Billing from the drop-down. If your Practice routes Billing-related Tasks to a different Department, make that selection instead or in addition.
   - **Staff**: Select to view All Tasks, only your Tasks (Mine), or Tasks assigned to selected staff members, as needed.
   - **Location**: Select All Authorized or a specific Location.
   - **Task Type(s)**: Select A/R Followup from the drop-down. If Billing tasks were created using a different task Type, make that selection instead or in addition.

3. Click **Search** to update the grid based on your selections.
4. *(Optional)* Enter text into the **Description contains** field to locate Tasks that include specific text. This field works in conjunction with the other selections made at the top of the Tasks window.
5. *(Optional)* Click the **Show/Hide columns** button 🗒 located to the left of the column headers to add or remove columns from the grid. When working on Billing Tasks, the following columns are most helpful to include in the Tasks grid (in addition to patient-identifying columns)

   - Status
   - Payer
   - Provider
   - Task Age
   - Ins Balance
   - Pat Balance
   - Priority

6. *(Optional)* **Group**, **sort**, and/or **filter** the grid as needed.
7. Double-click a Task to be taken directly to the area in OP that is typically where follow-up for the Task is performed based on the Task Type. The Task Status will be updated to In Progress. Keep in mind that this will remove it from the grid if your scope is set to exclude Tasks with a status of In Progress.
8. Perform your follow-up and make claim notes as you normally would to keep track of the work done on the claim.

Version 21.0

About

Billing Tasks are created so that billing-related issues requiring follow-up are not overlooked and can be worked from the Tasks window in OP (**Billing tab > Tasks**). This makes it easy for Billing staff to focus on similar Tasks all at once without having to work from individual patient charts. In the sections below, you'll learn how to:

- Create Billing Tasks
- Work Open Billing Tasks from the Task Window
- Create Billing Tasks
- Work Open Billing Tasks from the Task Window

- Create Billing Tasks
- Work Open Billing Tasks from the Task Window
- Create Billing Tasks

Create Billing Tasks

Billing-related Tasks are most easily created while completing your normal billing workflows. Regardless of where Task creation is initiated from, the steps to create the task are the same.

1. Navigate to where you'll be creating the Billing task from:

   - From the **Claims** section of the patient's chart, select the claim that requires follow-up and click the**Follow-up Task** button.
   - From the **Claims (A/R)** tab of the Billing Center, locate the claim that requires follow-up and click in the Claim Note field to access and click the **Task** button.
   - From the **Add Payments and Adjustments** window or the Bulk Payment Posting window, select the claim that requires follow-up and click the **Task** button located in the Claim note field.
   - From the **Adjudications** tab of the Billing Center, select the claim that requires follow-up and click the**Task** button located in the Claim note field.

2. In the Add Task window, review the defaults and make changes as needed or add additional information if necessary.

   - **Task Type**: Defaults to **A/R Followup**.
   - **Description**: The default description is "Follow-up (OP claim number, payer, and provider)". You can add information to this field, as needed. There is a character limit of 250.
   - **Special Instructions**: Enter instructions as needed. Some information you can consider adding here would be the Payer-assigned claim number or corrections that need to be made to the claim that you identified as you were creating the Task.
   - **Due Date**: Defaults to 2 weeks from the current date; can be changed as needed.
   - **Department**: Defaults to Billing; can be changed as needed.
   - **ICD-10, CPT Code(s), Provider, and Insurance**: No defaults, complete this information as needed so that the staff member performing the follow-up has as much information as needed to complete the Task.
   - *For reference only*: The Insurance and Patient Balance for the selected claim are displayed in the Add Task window.

3. Click **Save & Close** to send the Task to the Department selected and close the window. Or, click**Add** to start the creation of a new Task and repeat Step 2 above to create another Task.

Work Open Billing Tasks from the Task Window

1. Navigate to the Task window:**Billing tab > Tasks button**.
2. Use the Scope options at the top of the window to determine what Tasks will be displayed in the Task grid.

   - **Date range**: Select the Due or Requested (created) radio button and enter a Date Range.
   - **Status**: Select the Status radio button and select**Not started** from the drop-down.
   - **Department**: Select the Department radio button and select Billing from the drop-down. If your Practice routes Billing-related Tasks to a different Department, make that selection instead or in addition.
   - **Location**: Select All Authorized or a specific Location.
   - **Task Type(s)**: Select A/R Followup from the drop-down. If Billing tasks were created using a different task Type, make that selection instead or in addition.

3. Click **Search** to update the grid based on your selections.
4. *(Optional)* Enter text into the**Description contains** field to locate Tasks that include specific text. This field works in conjunction with the other selections made at the top of the Tasks window.
5. *(Optional)* Click the **Show/Hide columns** button located to the left of the column headers to add or remove columns from the grid. When working on Billing Tasks, the following columns are most helpful to include in the Tasks grid (in addition to patient-identifying columns)

   - Status

- Payer
- Provider
- Task Age
- Ins Balance
- Pat Balance
- Priority

6. *(Optional)* **Group**, **sort**, and/or **filter** the grid as needed.
7. Double-click a Task to be taken directly to the area in OP that is typically where follow-up for the Task is performed based on the Task Type. The Task Status will be updated to In Progress. Keep in mind that this will remove it from the grid if your scope is set to exclude Tasks with a status of In Progress.
8. Perform your follow-up and make claim notes as you normally would to keep track of the work done on the claim.