FSC Portal - Phase 2 Metrics Roadmap

Revenue Cycle Management & Reconciliation | October 17, 2025

■ Core Problem Being Solved

Current Challenge: Uncertainty about whether all sessions are being reimbursed across multiple insurance portals.
Goal: Create a centralized tracking system to ensure no session falls through the cracks from completion to payment.
Weekly Process: CSV upload from SimplePractice → Track status → Identify gaps → Ensure full reimbursement

■ Phase 2: Essential Tracking Features

Feature	Purpose	Priority
Session Status Pipeline	Track: Completed → Ready to Bill → Submitted → Paid → Denied	HIGH
Aging Report	Sessions >30, >60, >90 days without payment	HIGH
Insurance Portal Tracker	Which claims submitted to which portal, when	HIGH
Payment Reconciliation	Match CSV sessions to actual payments received	HIGH
Denial Management	Track denied claims, reasons, resubmission status	MEDIUM
Missing Claims Alert	Auto-flag sessions that should be billed but aren't	MEDIUM
Provider Productivity	Sessions by provider, unbilled hours, revenue generated	MEDIUM
Insurance Performance	Days to payment by payer, denial rates by payer	LOW

■ Dashboard Metrics (At-a-Glance View)

Metric	What It Shows	Alert Threshold
Total Sessions This Month	Volume of billable services	N/A
Unbilled Sessions	Completed but not yet submitted	>10 sessions
Outstanding Claims	Submitted but not paid	>$5,000
Avg Days to Payment	Time from session to payment	>45 days
This Month Collections	Actual revenue received	Track vs goal
Denial Rate %	Claims rejected / total claims	>5%
Oldest Unpaid Claim	Days since oldest submission	>90 days

■■ Database Schema Updates

New Fields for sessions table:
• billing_status: enum('ready_to_bill', 'submitted', 'paid', 'denied', 'appealing')
• date_submitted: timestamp

• date_paid: timestamp
• amount_billed: decimal
• amount_paid: decimal
• denial_reason: text
• insurance_portal_id: foreign key
• payment_reference: text

New Table: insurance_portals
• portal_name, login_url, credentials_vault_id, billing_route

New Table: payments
• payment_date, amount, check_number, sessions_covered (array), insurance_id

■ Updated Weekly Workflow

Step	Action	Owner
1. Upload CSV	Import SimplePractice export	Admin/Director
2. Auto-Match	System matches to existing sessions or creates new	System
3. Review Flags	Check duplicates, missing info, errors	Billing Staff
4. Mark Ready	Sessions move to "Ready to Bill" status	Billing Staff
5. Submit Claims	Log which portal, date submitted	Billing Staff
6. Track Status	Weekly check on submitted claims >14 days old	Billing Staff
7. Record Payment	Match payment to sessions, mark as paid	Billing Staff
8. Follow Up	Chase claims >45 days, appeal denials	Billing Staff

■ Phase 2 Reports

1. Aging Report - Outstanding claims by age bracket (0-30, 31-60, 61-90, 90+ days)
2. Insurance Payer Scorecard - Performance by payer (avg days to pay, denial rate, total volume)
3. Revenue Recognition Report - Sessions completed vs billed vs paid by month
4. Denial Analysis - Top denial reasons, patterns by provider/payer
5. Weekly Reconciliation - This week's sessions, their current status, what needs action

■■ Suggested Implementation Timeline

Week 1-2	Database schema updates, add status tracking fields
Week 3-4	Build status update UI, aging report, basic reconciliation
Week 5-6	Insurance portal tracker, payment matching workflow
Week 7-8	Denial management, automated alerts, dashboard polish