Phase 2 UI Mockup Specifications

Revenue Cycle Management Screens | FSC Portal

■ New Pages to Build

Page	Route	Purpose	Role Access
Revenue Dashboard	/billing/revenue	Financial overview & metrics	Admin, Director
Aging Report	/billing/aging	Outstanding claims by age	Admin, Billing
Claim Tracker	/billing/claims	All claims with status	Admin, Billing
Payment Entry	/billing/payments	Record payments received	Admin, Billing
My Work Queue	/work-queue	Assigned tasks by user	Billing
Session Detail	/sessions/[id]	Full session info + status	Admin, Billing, Director
Insurance Portals	/settings/portals	Manage portal info	Admin

1■■ Revenue Dashboard (/billing/revenue)

Layout: 4-column stats grid + 2 data tables + 1 chart **Stats Cards (Top Row):** • This Month Billed: $XX,XXX (green if >goal) • Outstanding: $XX,XXX (amber if >$5k) • Collected YTD: $XXX,XXX • Avg Days to Payment: XX days (red if >45) **Aging Summary Table:** ■■■■■■■■■■■■■■■■■■■■■■■■■■■■■■■■■■■■ ■ Age Bracket ■ Count ■ Total Amount ■ ■ 0-30 days ■ 45 ■ $12,450 ■ ■ 31-60 days ■ 12 ■ $3,200 ■ ■ 61-90 days ■ 3 ■ $850 [■] ■ ■ 90+ days ■ 1 ■ $250 [■■] ■ ■■■■■■■■■■■■■■■■■■■■■■■■■■■■■■■■■■■■ **Recent Payments Table:** Show last 10 payments with: Date | Payer | Amount | Sessions Covered **Chart:** Line graph showing monthly collections trend (last 12 months) **Actions:** • [View Full Aging Report] button • [Record Payment] button • Export to CSV

2■■ Aging Report (/billing/aging)

Filters (Top Bar): • Age bracket dropdown: All | 0-30 | 31-60 | 61-90 | 90+ • Payer dropdown: All | [list of payers] • Provider dropdown: All | [list of providers] • Status dropdown: All | Submitted | Pending | Approved **Data Table Columns:** ■■■ ■ Age ■ Date ■ Client ■ Provider ■ Payer ■ Status ■ Billed ■ Actions■ ■ 45d ■ 9/1 ■ A.J. ■ L.Rivera ■ Aetna ■Pending ■ $125 ■ [...] ■ ■■■ **Row Colors:** • White: 0-30 days • Amber-50: 31-60 days • Orange-100: 61-90 days • Red-100: 90+ days **Actions Dropdown (per row):** • View Details • Update Status • Add Note • Mark as Denied • Check Portal Status **Bulk Actions (checkboxes):** • Select multiple → [Submit All] | [Follow Up] | [Export Selected] **Stats at Bottom:** • Total Outstanding: $XX,XXX • Total Selected: $X,XXX • Avg Age: XX days

3■■ Claim Tracker (/billing/claims)

Purpose: Track every session through the billing lifecycle **Search Bar:** Search by client name, provider, date range, claim reference number **Status Filter Tabs:** [All] [Ready to Bill] [Submitted] [Pending] [Approved] [Paid] [Denied] **Table Columns:** ■■■ ■■■■■■■■■■■■■■■■■■■■■■■ ■Date■Client■Provider■Minutes■Status■Submitted■Portal■Days■Amount■Actions ■ ■9/1 ■A.J. ■Rivera ■

50 ■[Paid]■ 9/5 ■Aetna ■ 12 ■$125 ■[View] ■ ■■■
■■■ **Status Badges (color-coded):** • Ready to Bill: Blue • Submitted: Purple • Pending: Yellow • Approved: Light Green • Paid: Green • Denied: Red **Quick Actions (per row):** • Change Status → Dropdown with valid next statuses • Record Payment → Modal form • View Timeline → Show status history • Add Note **Pagination:** 50 results per page with [Previous] [1] [2] [3] ... [Next]

4■■ Payment Entry (/billing/payments)

Layout: Two-column form + table **Payment Form (Left Side):** ■■■■■■■■■■■■■■■■■■■■■■■■■■■■■■■■■■■■■■■ ■ Record New Payment ■ ■ ■ ■ Payment Date: [date picker] ■ ■ Amount: $[_____] ■ ■ Payer: [dropdown] ■ ■ Check #: [_____] ■ ■ Method: ■ Check ■ EFT ■ CC ■ ■ ■ ■ Sessions to Apply: ■ ■ [Search for sessions...] ■ ■ ■ ■ ■ A. Johnson - 9/1 - $125 ■ ■ ■ B. Smith - 9/2 - $150 ■ ■ ■ C. Mendez - 9/3 - $125 ■ ■ ■ ■ Total Selected: $275 ■ ■ Remaining: $0 ■ ■ ■ ■ [Cancel] [Save Payment] ■ ■■■■■■■■■■■■■■■■■■■■■■■■■■■■■■■■■■■■■■■ **Recent Payments Table (Right Side):** Last 20 payments with ability to edit/delete **Features:** • Auto-suggest sessions from selected payer • Show only unpaid sessions • Validate total matches amount • Option to create partial payment • Automatically update session status to "paid"

5■■ My Work Queue (/work-queue)

Purpose: Personalized task list for billing staff **Section 1: Alerts (Top Priority)** ■■■ ■ ■ CRITICAL: 2 claims over 90 days old ■ ■ ■ WARNING: 5 claims ready to follow up ■ ■ ■ INFO: 12 sessions ready to bill ■ ■■■ **Section 2: My Assigned Sessions** Grouped by urgency: **Needs Immediate Action (red):** • Sessions >7 days in "ready to bill" • Claims >30 days in "submitted" • Denied claims needing appeal **This Week's Work (yellow):** • Sessions ready to bill (0-7 days) • Claims to follow up (14-30 days) **On Track (green):** • Recently submitted (<14 days) • Awaiting payment (<30 days) **Quick Actions:** • [Submit All Ready] button • [Generate Follow-Up List] button • [Mark Complete] checkbox per item

6■■ Session Detail (/sessions/[id])

Layout: Full-page modal or dedicated page **Header:** ■■■ ■ Session Details ■ ■ September 1, 2025 • 9:00 AM - 9:50 AM ■ ■■■ **Info Cards (3 columns): Client Info:** • Name: Alex Johnson • Type: Adult • Insurance: Aetna **Provider Info:** • Name: Lauren Rivera • Clinical Notes: [Submitted] • Documentation Date: 9/2 **Billing Info:** • Minutes: 50 • Amount: $125.00 • Status: [Submitted] (change dropdown) • Portal: Aetna NaviNet **Timeline Section:** ■■■ ■ Status History ■ ■ ■ 9/1 9:00 AM - Session Completed ■ ■ ■ 9/2 3:15 PM - Note Submitted ■ ■ ■ 9/5 10:30 AM - Ready to Bill ■ ■ ● 9/6 2:45 PM - Submitted to Portal ■ ■ (Current Status) ■ ■■■ **Actions Bar:** [Update Status] [Record Payment] [Add Note] [Flag Issue] [Close] **Notes Section:** Text area for internal billing notes

7■■ Insurance Portals (/settings/portals)

Purpose: Manage insurance portal credentials and info **Table:** ■■■ ■ Payer Name ■ Portal Name ■ URL ■ Actions■ ■ Aetna ■ NaviNet ■ navinet.net ■ [Edit] ■ ■ Horizon ■ Provider Port ■ horizon.com ■ [Edit] ■ ■■■ **Add Portal Button:** [+ Add New Portal] **Edit Modal:** ■■■■■■■■■■■■■■■■■■■■■■■■■■■■■ ■ Edit Portal Information ■ ■ ■ ■ Payer: [Aetna dropdown] ■ ■ Portal Name: [NaviNet] ■ ■ Portal URL: [navinet.net] ■ ■ Billing Route: ■ Portal ■ SP ■ ■ ■ ■ Login Instructions: ■ ■ [text area for notes] ■ ■ ■ ■ [Cancel] [Save] ■ ■■■■■■■■■■■■■■■■■■■■■■■■■■■■ **Security Note:** Do NOT store actual passwords in the system. Use a password manager. This is just for reference (URL, username format, etc.)

■ Reusable UI Components

Component	Usage	Props
StatusBadge	Show billing status	status: string, size: sm|md|lg
SessionCard	Compact session display	session: object, onClick
DateRangePicker	Filter by date range	startDate, endDate, onChange
AlertBanner	Show critical alerts	type: critical|warning|info, message
PayerDropdown	Select insurance payer	value, onChange, payers[]
AmountInput	Currency input	value, onChange, currency
StatusDropdown	Change status with validation	currentStatus, onUpdate
ConfirmModal	Confirm destructive actions	title, message, onConfirm

■ Design Tokens & Colors

Status Colors: • Ready to Bill: Blue-600 (#2563eb) • Submitted: Purple-600 (#9333ea) • Pending: Yellow-500 (#eab308) • Approved: Green-400 (#4ade80) • Paid: Green-600 (#16a34a) • Denied: Red-600 (#dc2626) • Appealing: Orange-600 (#ea580c) **Alert Severity:** • Critical: Red-100 background, Red-700 text • Warning: Yellow-100 background, Yellow-700 text • Info: Blue-100 background, Blue-700 text **Typography:** • Page Titles: text-2xl font-bold text-slate-900 • Section Headers: text-lg font-semibold text-slate-700 • Body: text-sm text-slate-600 • Labels: text-xs font-medium text-slate-500 **Spacing:** • Section gaps: space-y-6 • Card padding: p-6 • Table cells: px-3 py-4

■ Mobile Responsiveness

Priority 1 (Must work on mobile): • Dashboard stats cards (stack vertically) • My Work Queue • Session Detail view • Quick status updates **Priority 2 (Desktop-first):** • Aging Report (wide table, scroll horizontal on mobile) • Payment Entry (use mobile-optimized form) • Full claim tracker **Mobile Navigation:** • Hamburger menu for sidebar • Sticky header with key actions • Bottom navigation for common tasks • Swipe gestures for status changes