Managing Charges Using Reports–For Billing Administrators

PatientKeeper®

There are many different Revenue Reports; each is a report that is tailored to a specific workflow, and shows only the information that is necessary for that workflow. There are several standard reports as illustrated below, but your administrator may rename or tailor these to fit your organization's needs. Most of the buttons and controls are similar on all reports and are described below.

Expand/Collapse Button
Click here to close (or open) the entire criteria section (the dark gray area), so that you have more room to view the report in the Display Area.

Left and Right Arrows
If there are more open tabs than can fit across the screen, use these arrows to scroll left or right to see the other tabs.

Click X to Close
Hover your mouse over a tab to expose an **X** icon, then click it to close the tab.

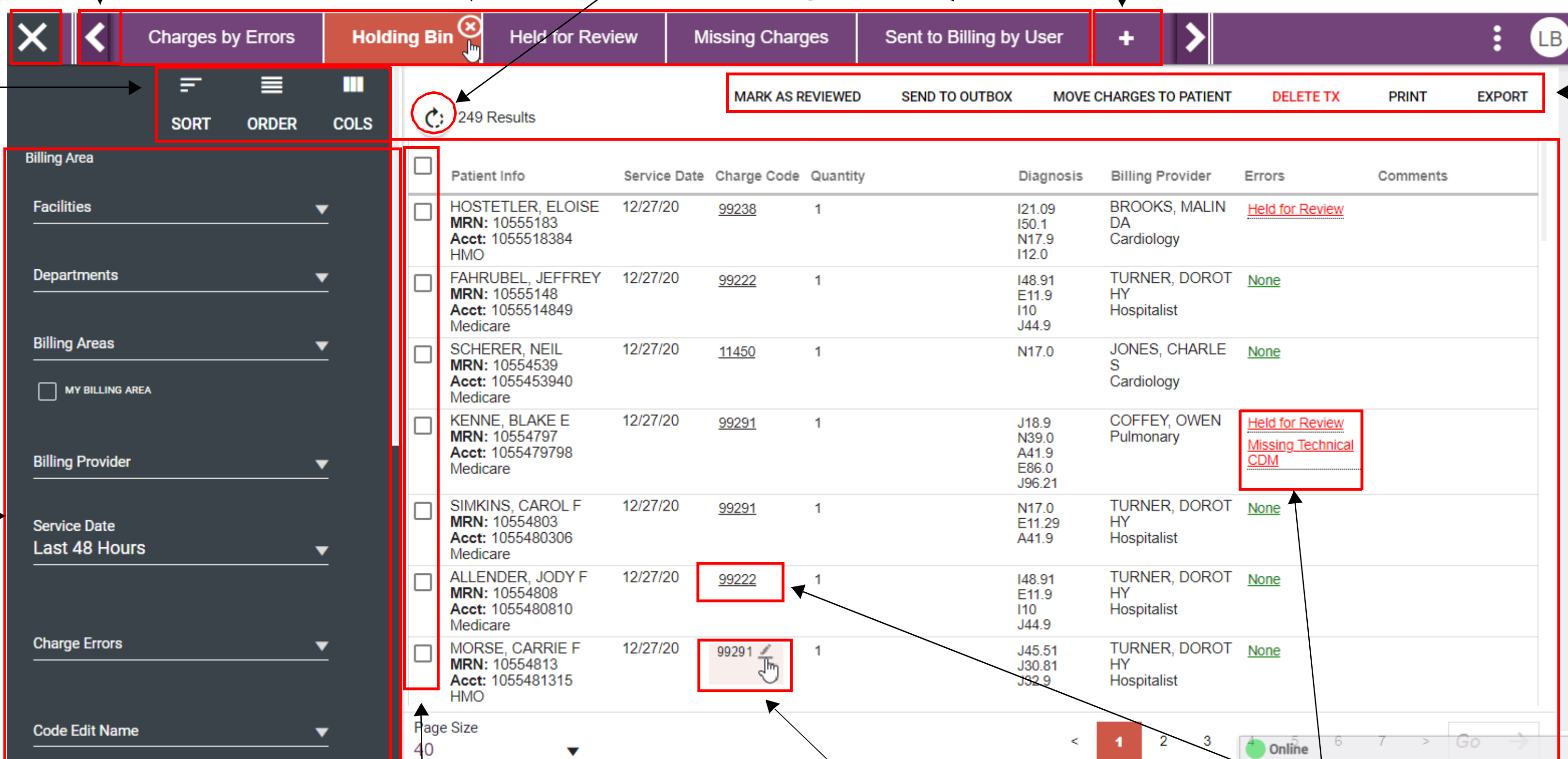
Refresh Button
Click to update the information in the Display Area.

Navigation Tabs
Each tab represents a different screen. The currently open screen is orange.

Open New Screen
Click here to view a list of screens and open a different one.

SORT, ORDER, and COLS Buttons
Use these buttons to:
SORT: Change the sort order of the report.
ORDER: Change the order in which the columns are listed, left to right across the top of the report.
COLS: Add or remove columns on the report.

Run-time Filters
Use the filter fields to narrow the report down to the specific information that you want to see.



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Action Buttons
After selecting one or more charge transaction rows (1), click a button here to perform an action on those items.

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Selection Checkboxes
Click one or more boxes to select charge transactions, and then click a button in the top right (2) to take an action on all of those transactions at once.

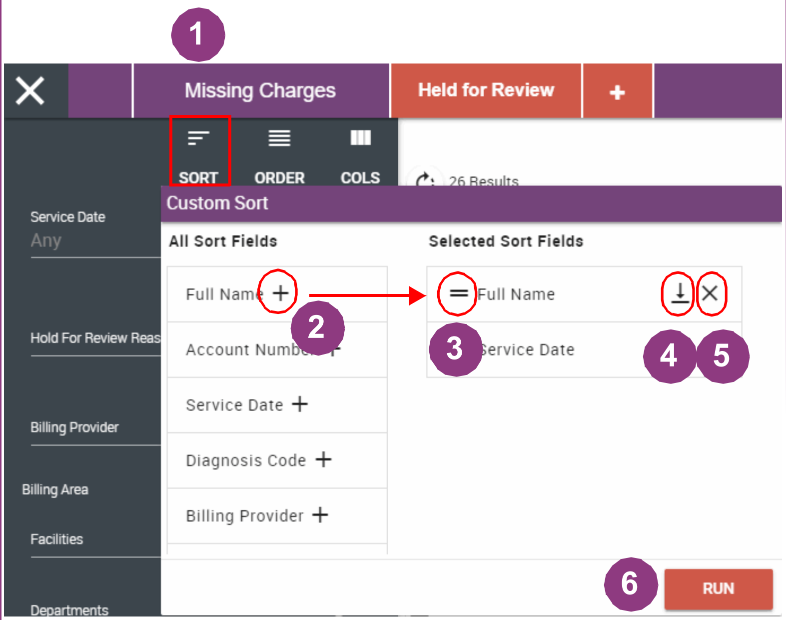
Links to Edit Codes Directly on Report Screen
On some reports, the charge codes, quantity, modifiers, or diagnosis codes can be edited directly on the report screen (without opening the charge). Hover your mouse cursor over the code to expose an **Edit** icon, and then click it. You can then change, add, or remove codes.

Links to Open Charge Transaction for Editing
Most charge reports have a column that contains a link that you can click to open a transaction for viewing or editing. The link could be on the charge code or on the error type.

Changing the Sort Order

Change the order in which the report is sorted (vertically).

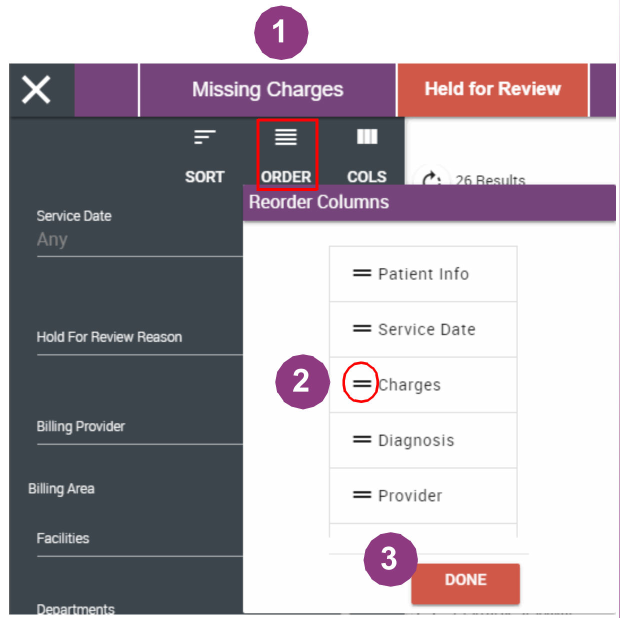
1. Click the **SORT** button.
2. Click **+** to add a new sort level.
3. Grab a handle and drag an item to change the sort order (for example, drag **Full Name** below **Service Date**).
4. Click the **Ascending/Descending** buttons to change the order for an item.
5. (Optional) Click **X** to remove a sort level.
6. Click **RUN**.



Changing the Order of the Columns

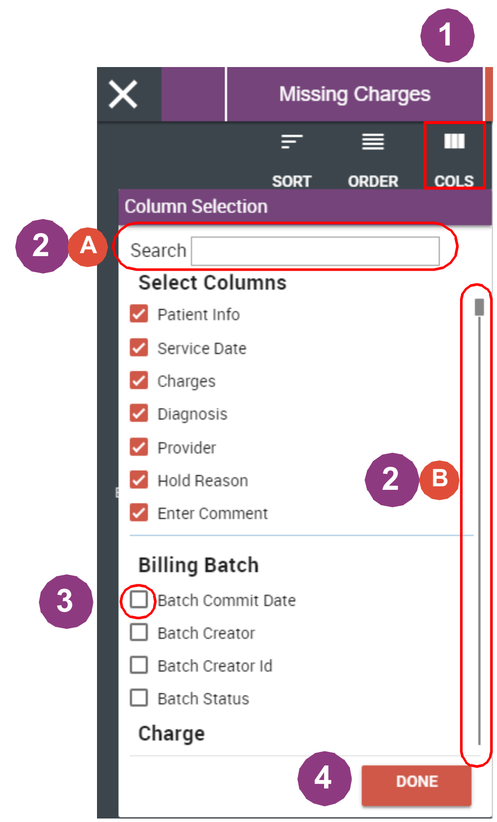
Change the order in which the columns are listed, left to right across the top of the report.

1. Click the **ORDER** button.
2. Grab a handle and drag an item to a different position.
3. Click **DONE**.



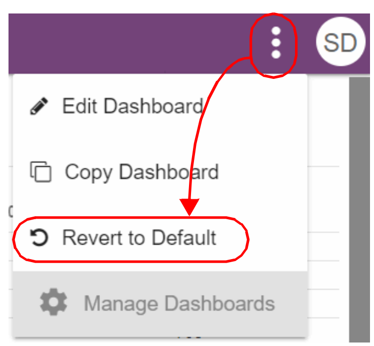
Adding or Removing Columns

1. Click the **COLS** button.
2. Select a column by either:
   a. Typing a few characters of the field name in the **Search** field, or
   b. Scrolling down until you see the field you want.
3. Click on the checkbox next to the column name when you find it (select as many columns as you want).
4. Click **DONE**.



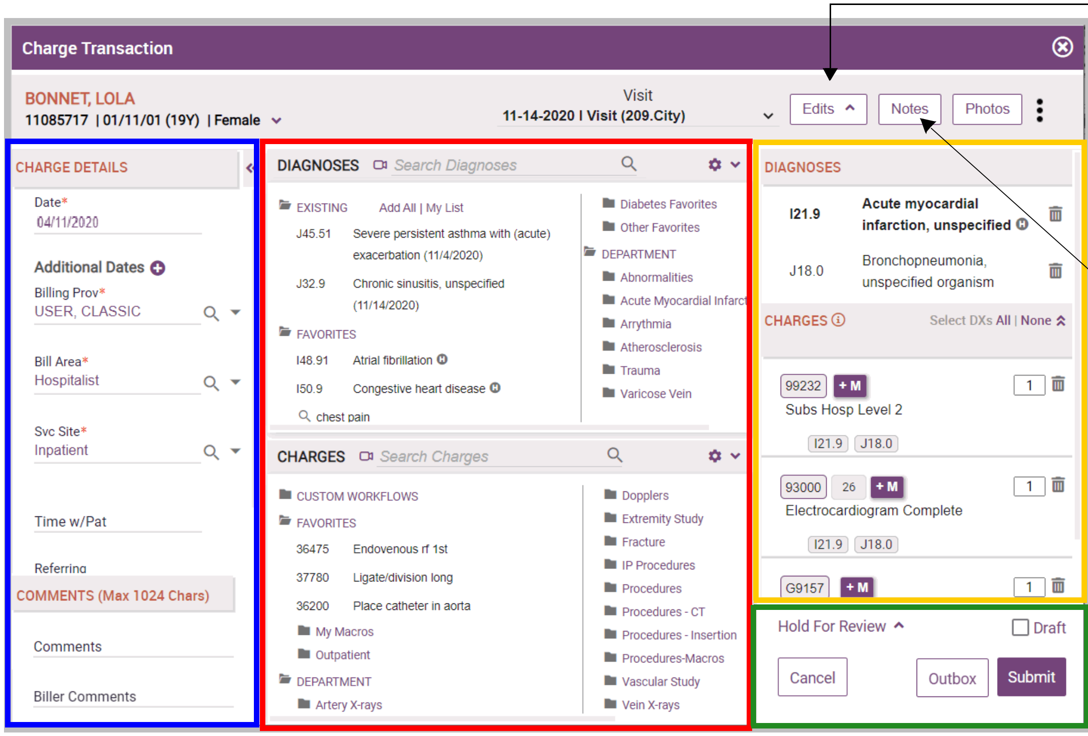
Undoing Your Changes to a Report

- The changes you make using the **SORT**, **ORDER**, or **COLS** buttons are not sticky -- the report will revert back to its original format after you log out. However, if you want to undo your changes immediately, you can use the **Revert to Default** option.
- Any selections you make using the run-time filters in the left pane *are* sticky -- those selections will be retained after logging out. However, you can use the **Revert to Default** option to reset those as well.

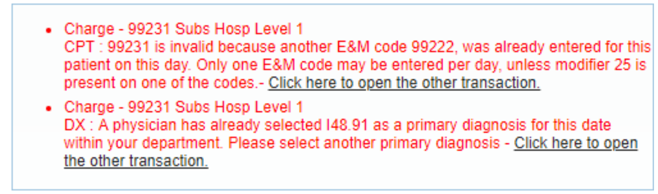


Correcting Charges on the Charge Transaction Screen

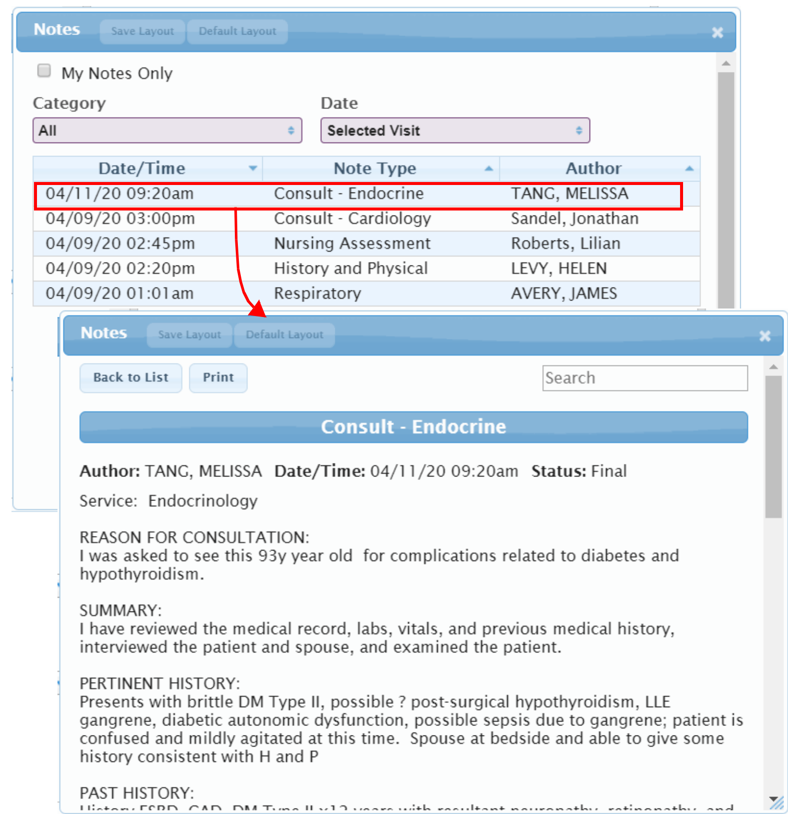
When you click on a link on a charge report, the Charge Transaction screen opens so that you can review the transaction and make corrections.



If there are any errors, they are shown in a dialog box at the top of the screen, similar to the example below. You can also click the **Edits** button after making corrections to check the transaction for any remaining errors.



Click the **Notes** button to display a list of the patient's clinical notes. Then click on a note from the list to view it.



The Charge Transaction screen consists of four main areas:

- The **CHARGE DETAILS**, located on the left side of the screen (highlighted in blue), displays billing information associated with the entire transaction, such as Service Date and Billing Provider.This area also contains the **Comments** and **Biller Comments** fields.
- The **DIAGNOSES** and **CHARGES Search** sections (highlighted in red), is located in the middle of the screen. It contains a variety of options for finding diagnosis and charge codes. Once you select a diagnosis or charge code here, it is displayed in the **SELECTED CODES** section, on the right side of the screen.
- The **SELECTED CODES** section (highlighted in yellow) displays the charges and diagnoses that have been selected so far. You can reorder these items via drag and drop, change the quantity, or add modifiers to the charges.
- The **Save Options** are located at the bottom of the screen (highlighted in green):
  - Click **Submit** to save your changes.
  - Click **Outbox** to save your changes and immediately send the transaction to the Outbox.
  - Use the **Hold for Review** option (and select a Hold Reason), if you want to hold the charge for further review. Or, if the transaction was already held for review by the provider, this option will be called **Mark as Reviewed**. Make any necessary corrections, click the **Up Arrow** to the right of the **Mark as Reviewed** option to mark one or more of the Hold Reasons as reviewed, and then **Submit**.

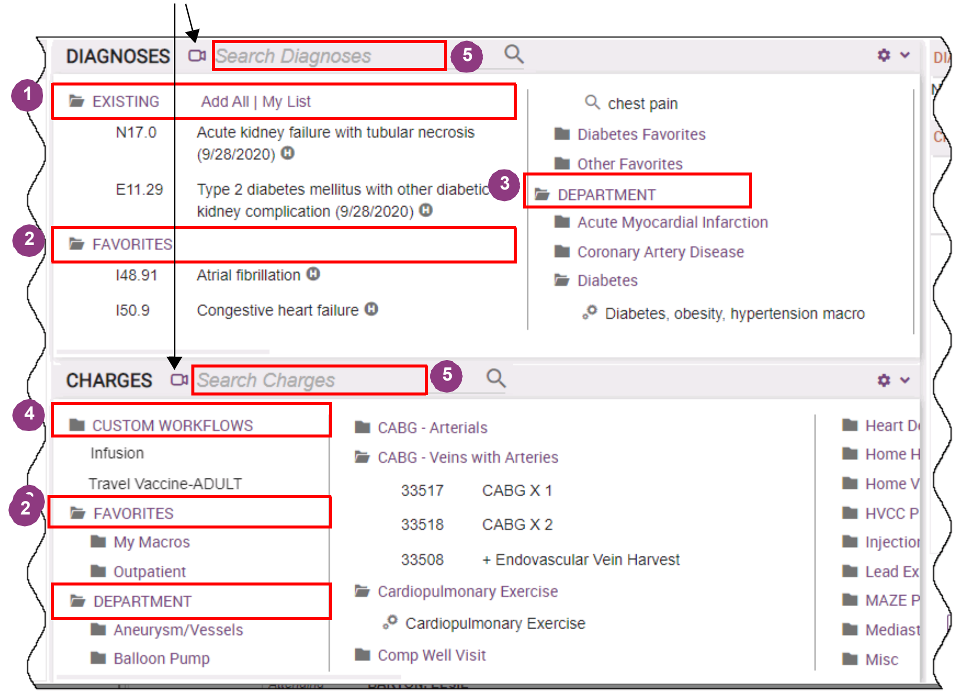
Tip: If you are working from a charge report, and you want to immediately open the next charge on the report after clicking Submit/Outbox/Mark as Reviewed, go to: **More** ⋮ > **Screen Settings** and turn on **Enable Open Next on Submit, Mark as Reviewed, or Send to Outbox**.

Quick Ways to Find Diagnosis or Charge Codes

Some or all of these options for selecting codes may be available to you:

Tip: Click a **Video** icon to watch a short "How-To" video about a particular section of the screen.

1. **EXISTING**: For diagnoses only, view and select from the patient's list of existing diagnoses.
2. **FAVORITES**: For both charges and diagnoses, view and select from those codes you have identified as your favorites.
3. **DEPARTMENT**: For both charges and diagnoses, your department's commonly used codes in are organized into a series of categories. Click any **DEPARTMENT** category to open it, and then select a code.
4. **CUSTOM WORKFLOWS:** For charges only, click on a workflow name to open a custom screen and answer questions to identify the services that were performed. After you answer the questions, the correct charge codes are automatically selected for you. (This section displays only if configured to be available.)
5. **Search/Free Text**: For both charges and diagnoses, search for a specific code if you cannot find it using any of the options above, or enter a charge or diagnosis as free text.



Managing Your Diagnosis and Charge Lists

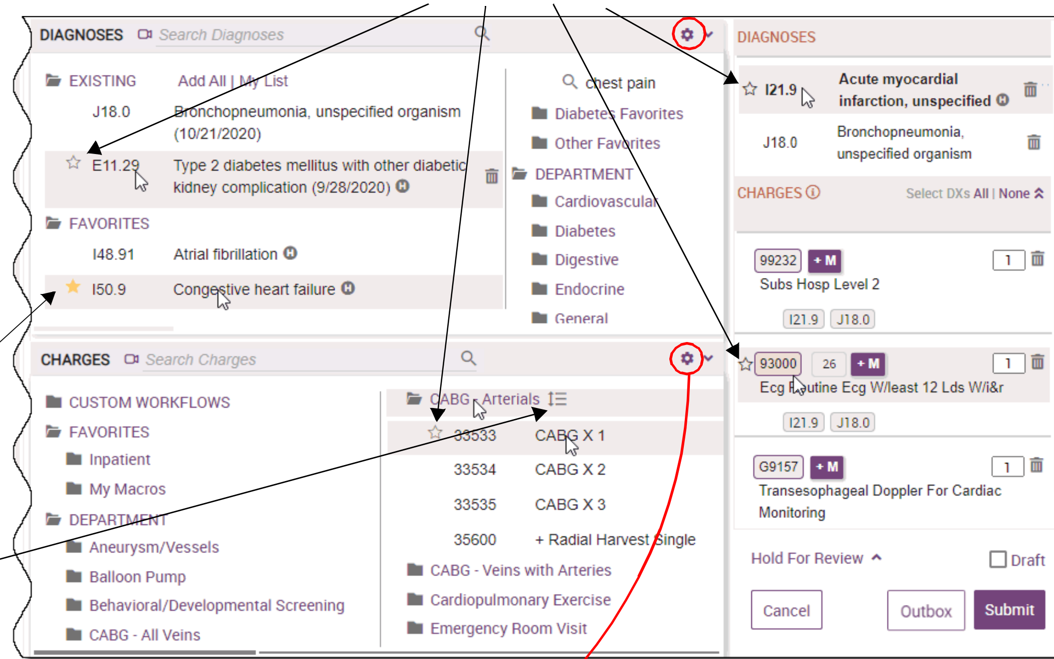
Making Changes Directly on the Charge Transaction Screen

Some changes can be made directly on the Charge Transaction screen. When you hover your mouse cursor over a code or category, various icons are exposed that allow you to make changes.

Click the white **Favorites** icon to add a code to your **FAVORITES** list.

Click the gold **Favorites** icon to remove a code from your **FAVORITES** list.

Sort the contents of a folder (the folder must be open before the **Sort** icon becomes available).



Making Changes via the List Management Option

Clicking the **Settings** button ⚙ at the top right of the **CHARGES** or **DIAGNOSES** sections to open the Charge or Diagnosis List Management screen, where you can make even more changes.

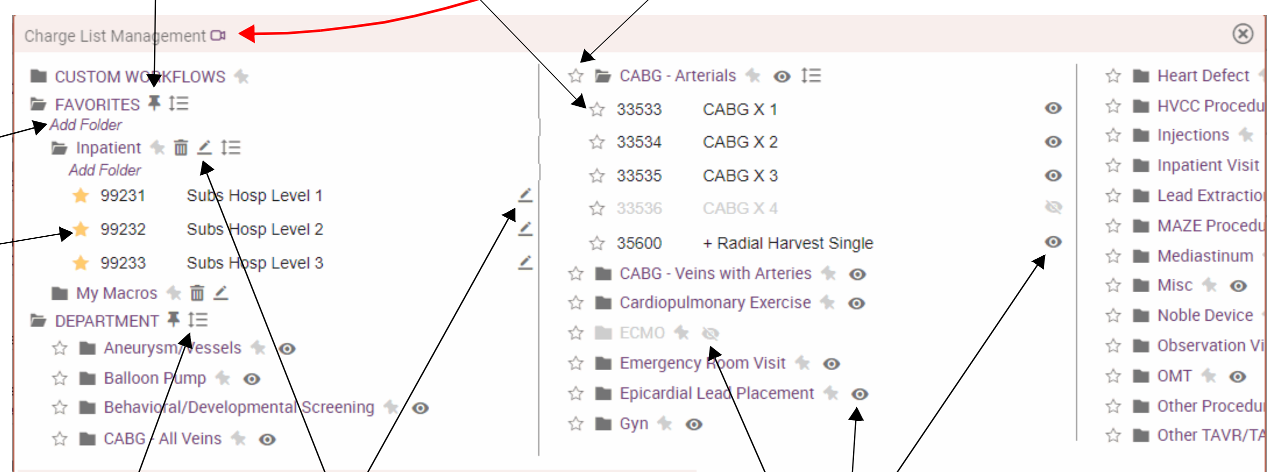
Pin a folder open, so that it always opens by default when you first open the Charge Transaction screen.

Click the white **Favorites** icon next to a **DEPARTMENT** code to add it to your **FAVORITES** list.

Click the white **Favorites** icon next to a **DEPARTMENT** category to create a copy of the category in your **FAVORITES** list. Once created, the copied category can be changed in any way (rename it, add or remove codes, sort it differently).

Add a new folder in **FAVORITES** to help organize your codes.

Click the gold **Favorites** icon next to a code to remove it from your **FAVORITES**.



Sort the contents of a folder.

Edit the name of a **FAVORITE** folder or code.

Show or hide a **DEPARTMENT** folder or code.