

How to Efficiently Resolve Old AR

Kristen Nehk
Director of Revenue Cycle Management

2 Types of AR

- Patient Due Balances
- Insurance Due Balances

Patient Due Balances

- Categorize the balances: Over 60 days, over \$20, and under \$20
- Know your states statute of limitations on collecting dues.
- Partner with a collection agency.
- If patients have not received statements in more than 4 months, send a courtesy statement out to patients.

Running Patient Due Report in Prognosis

- Billing: Reports: Tabular: Patients with more than X statements sent after last payment

My Reports All Reports Classification: ALL Reports: Patient with more than X Statement sent after la

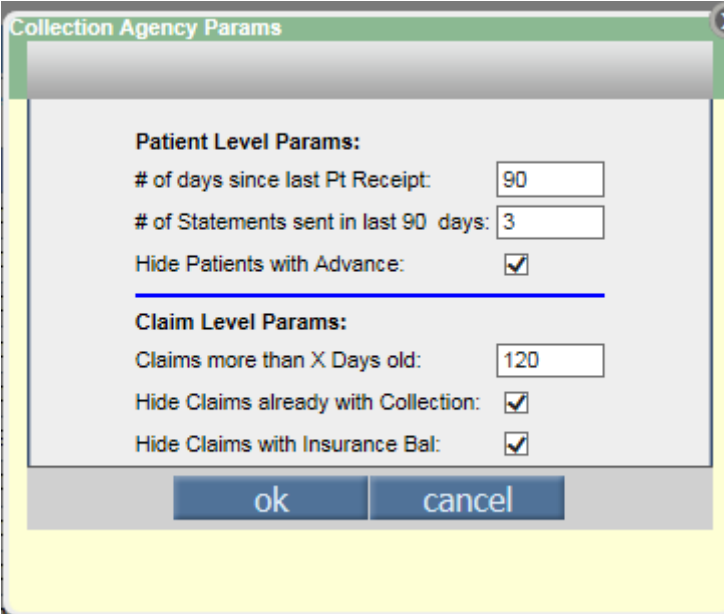
Period: [] From: [] UpTo: [] Doctor: ALL Days: []

Number of Statements: 2

Patient with more than 2 Statement sent after last Payment												
Financial Class	Patient	Date of Birth	Chart No.	SSN	Address	City	State	Zip	Home Tel.	Cell No.	Number of Statements	Bal Amt
Financial class 1												

Sending patient to Collections in Prognosis

- Billing:AR Followup: Send to Collections



The screenshot shows a dialog box titled "Collection Agency Params" with a close button (X) in the top right corner. The dialog is divided into two sections: "Patient Level Params" and "Claim Level Params".

Patient Level Params:

- # of days since last Pt Receipt: 90
- # of Statements sent in last 90 days: 3
- Hide Patients with Advance:

Claim Level Params:

- Claims more than X Days old: 120
- Hide Claims already with Collection:
- Hide Claims with Insurance Bal:

At the bottom of the dialog are two buttons: "ok" and "cancel".

Sending to Collections Cont'd

Sel	Patient	Claim	DOS	Provider	Bill Amt\$	Ins Bal\$	Pat Bal\$	Claim Bal\$	Col Agency
<input type="checkbox"/>	Anderson, Ava-Brooke	58	11-14-2011	Sheldon Cooper, MD	125.00	0.00	125.00	125.00	
<input type="checkbox"/>	Anderson, Ava-Brooke	1	11-30-2011	Sheldon Cooper, MD	140.00	0.00	140.00	140.00	
<input type="checkbox"/>	Anderson, Chewie	30	01-12-2012	Sheldon Cooper, MD	394.00	0.00	394.00	394.00	
<input type="checkbox"/>	Babb, Harry	12	12-03-2011	Sheldon Cooper, MD	465.00	0.00	145.00	145.00	
<input type="checkbox"/>	Bair, Sherry	109	05-30-2012	Internist Butler, MD	238.00	0.00	193.00	193.00	
<input type="checkbox"/>	Bair, Sherry	149	04-08-2013	Internist Butler, MD	100.00	0.00	100.00	100.00	
<input type="checkbox"/>	Cote, Victor	86	11-12-2011	Sheldon Cooper, MD	340.00	0.00	320.00	320.00	
<input type="checkbox"/>	Dallen, Allen	154	05-05-2013	Internist Butler, MD	175.00	0.00	15.00	15.00	
<input type="checkbox"/>	G, Lauro	303	02-14-2017	Internist Butler, MD	309.40	0.00	20.00	20.00	
<input type="checkbox"/>	Girl, Rosie	98	08-07-2012	Rajesh Koothrapali, PA	160.00	0.00	160.00	160.00	
<input type="checkbox"/>	Haney, Shirley	106	04-23-2012	Internist Butler, MD	238.00	0.00	13.80	13.80	
<input type="checkbox"/>	Paltrow, Mary	19	11-04-2011	Internist Butler, MD	300.00	0.00	300.00	300.00	
<input type="checkbox"/>	Rotten, Anna	17	11-02-2011	Sheldon Cooper, MD	100.00	0.00	10.00	10.00	
<input type="checkbox"/>	Shanabarger, Joseph	73	05-12-2012	Sheldon Cooper, MD	100.00	0.00	10.00	10.00	
<input type="checkbox"/>	Shanabarger, Sheldon	97	05-14-2012	Sheldon Cooper, MD	300.00	0.00	180.00	180.00	
<input type="checkbox"/>	Winkle, Leslie	65	04-12-2012	Sheldon Cooper, MD	240.00	0.00	140.00	140.00	
<input type="checkbox"/>	Wolowitz, Bernadette	4	10-22-2011	Sheldon Cooper, MD	335.00	0.00	275.00	275.00	

Collection Agency Count 0 / 17 Selected Amt \$ 0.00

Categorize your Insurance AR

- Reports:Aging:

Insurance Name	UnApplied \$	30 days	31-60 days	61-90 days	91-120 days	120 Plus	Total Due
Aetna	638.59	39,683.00	2,348.00	970.00	225.00	20.00	43,246.00
BCBS	113.71	18,895.00	1,639.00	405.00	0.00	778.00	21,717.00
Cigna	719.56	17,459.00	3,430.00	635.00	0.00	0.00	21,524.00
Commercial	-2.42	20,716.00	135.00	1,084.00	0.00	3,532.00	25,467.00
Hillls Physician IPA	58.95	1,602.00	0.00	0.00	0.00	0.00	1,602.00
Humana	0.00	0.00	0.00	0.00	0.00	0.00	0.00
United HealthCare	59.19	10,200.46	0.00	0.00	479.00	4,382.00	15,061.46
Grand Total (Total Count 45)	1,587.58	108,555.46	7,552.00	3,094.00	704.00	8,712.00	128,617.46

Working the AR

- Have a method for working down the AR.
 - Work in Groups
 - By Patient
 - Highest Dollar Value to Lowest
 - Oldest to Newest

 - For example, Aetna, 90-120 group, sort by patient and dollar value

Working the AR Cont'd

- Billing:AR Follow up: Outstanding: Go to the filter:

The screenshot displays the 'Outstanding Filter' application window. At the top, there is a 'Select Filter' dropdown menu and a 'Clear Selection' checkbox. The window is organized into several sections, each with a blue header:

- Outstanding and Responsibility Related Filters:** Includes fields for 'Responsibility With' (dropdown), 'Payment Status' (dropdown), 'Min OS Days from DOS' (text input), 'Max OS Days from DOS' (text input), 'Min Balance' (text input), and 'OS Days from DOS' (text input).
- Insurance Related Filters:** Includes 'Selected Insurance As' (dropdown), 'Insurance Selection' (text input with a 'clear' button), 'Insurance AR Code' (text input with a 'clear' button), 'Insurance Name Like' (text input), 'Pri Insurance AR Code' (dropdown with 'AETNA' selected), and 'Beyond Ins Response Days' (dropdown).
- Patient Related Filters:** Includes 'Patient Name Like' (text input), 'Patient Last Name From' (text input), 'Patient Chart No like' (text input), 'Employer Name' (text input), 'Patient Last Name Upto' (text input), 'Patient Account No like' (text input), and 'Patient Financial Class Code' (dropdown).
- Claim Related Filters:** Includes 'Creation Batch #' (text input), 'Claim Id From' (text input), 'DOS From' (text input with a 'clear' button), 'Self Pay Claim' (dropdown), 'Send Date From' (text input with a 'clear' button), 'Claim Send Mode CMS/EDI' (dropdown), 'Track Status #' (text input), 'Location' (text input with a 'clear' button), 'Case No' (text input), 'Claim Id Upto' (text input), 'DOS Upto' (text input with '10-15-2017' and a 'clear' button), 'Send Date Upto' (text input with a 'clear' button), 'EDI batch #' (text input), 'Track Status Nos Not in' (text input), and 'Business Unit' (text input with a 'clear' button).

At the bottom of the window, there is a row of buttons: 'apply', 'reset', 'save filter', 'save as', 'delete', and 'cancel'.

Working the AR Cont'd

Claim Id	DOS	Track Status	Patient	Send Date	Payor	Charge Amt	Balance Amt	Denied	Last EOBDate	AssignTo	AssignDate	AssignStatus	FollowupDate	Render
<input type="checkbox"/> 2	10-20-2011	51	Santiago, Ramon	01-12-2012	Aetna	475.00	355.00	R2	08-22-2017 *	minal	05-23-2012			Internist
<input type="checkbox"/> 70	05-08-2012	51	Harris, George	05-08-2012	Aetna, Medicare	200.00	200.00			Admin Biller	11-02-2017	Claim in process AR Follow-up Please follow up		Internist
<input type="checkbox"/> 155	05-06-2013	51	Pope, Olivia	05-06-2013	Aetna, Bakery & Confectionary Union	100.00	100.00			Admin Biller	11-02-2017	Claim in process AR Follow-up Please follow up		Internist
<input type="checkbox"/> 76	05-23-2012	18	Dummy, Sally	08-31-2014	Aetna, Medicare, Medicaid	360.00	260.00							Sheldon

Count Total Charge/Bal

Page 1

Determine 'Lost' Claims

- When running outstanding report in Prognocis, you can identify last send date and last EOB date.
- Use this information to determine claims which have been lost to Timely filing

Send Date	Last EOBDate
01-12-2012	08-22-2017 *
05-08-2012	
05-06-2013	
08-31-2014	

Use 'Tasks' to Work AR



Claim Id: 2 **Claim Date: 10-20-2011** **Patient: Santiago, Ramon (DOB: 02-01-1948)**

Assignment

* Assigned To: User Role

* Source:

* Action Required:

Comments:

* Expected Date:

Send Message: CC: [clear](#)

Action

Action Taken:

Comments:

Status:

Done: Date:

Followup Date:

Assignment Tracking

Date Assigned	Assigned By	Assigned To	Action Required	Comments	Exp Date
05-30-2017	Sunil Jagtap	Amit Rahate	Follow-up	Hi Amit, Please provide us website login for BCBS ..	05-30-2017

Track your AR Movement/Rollover

AR Movement By AR Group - 90 Plus and Total AR				
Pri / Sec / Ter	AR Group	AR Date	90 Plus AR Amt	Total AR Amt
Pri				
	AETNA			
		10-31-2017	0.00	1,095.02
		11-30-2017	0.00	870.01
		12-31-2017	0.00	140.00
	BCBS			
		10-31-2017	730.00	3,825.01
		11-30-2017	935.00	4,290.00
		12-31-2017	755.00	2,840.02
	Cigna			
		10-31-2017	0.00	205.02
		11-30-2017	0.00	205.00
		12-31-2017	0.00	140.00

Important Tips

- Run aging prior to starting and then once a week on same day/same time period until clean.
- Set a timeframe for clean up, 3-6 months.
- Track clean up progress through Tasks and AR movement reports
- Set your write off codes, example: TFL Adjustment
- Set up online logins with payers.

To Request More Information about Prognocis Revenue Cycle Management/Medical Billing

Contact PrognocIS Sales at:
(877) 693.6748
sales@bizmaticsinc.com

For more information, visit our website at:
<https://prognocis.com/medical-billing-services>

Thank You

- Thanks for your attendance!



- Stay informed about our upcoming webinars by signing up for the
- EHR e-newsletter:
- <http://prognocis.com/ehr-newsletter/>