



Billing Dashboard

Objective & Goal:

- Review setting up billing dashboard
- Review benefits of billing dashboard

The Billing Dashboard offers managers one place to view the financial status of the organization. From the Billing Dashboard, managers can view the AR by bucket, money collected and claim statuses.

Month-to-date collections

This section displays the total money collected by the practice from the beginning of the month to today. The section also displays the same time span for previous months. For example, if today is the 15th of May, the section displays all the money collected between May 1 and May 15, April 1 and April 15, March 1 and March 15, etc. The collected money is broken into patient and insurance buckets. Note, the date is based on receipt date; refunds are not taken into account for this total. For detail of these payments, see the Receipt or Revenue reports.

Month-to-date collections: ▼ □ 📄 ✕		
Date	Patient Paid	Insurance Paid
05/16/2008	175.00	200.00
04/16/2008		
03/16/2008	0.00	45.00
02/16/2008	0.00	314.00
01/16/2008	252.00	0.00
Total	427.00	559.00

Accounts Receivable

The accounts receivable section displays a summary of outstanding balances in the system. The balance is broken into patient/insurance balances and aging buckets. The dashboard also displays the Open Credits. This is only a summary; for a detailed view see the Collections module.

Accounts Receivable: ▼ □ 📄 ✕							
From	0-30 Days	%	31-60 Days	%	61-90 Days	%	91-120 Day
Insurance	38,870.00	12.43	194,734.74	62.29	5,511.00	1.76	8,743.00
Patient	5,864.00	46.81	721.00	5.76	719.00	5.74	185.00
Total	44,734.00	13.76	195,455.74	60.11	6,230.00	1.92	8,928.00

NOTES:



Insurance Claim Status

The insurance claim status section displays all claims sent in a date range and the status of those claims, whether they are outstanding, paid, rebilled, rejected, etc. There is a System Parameter > Bill General > Number of Days to Retrieve Claims, to determine the number of days to look in the past for claims.

Insurance claim status: ▼ □ □ ×			Claim Sent Date (From:04/02/2008 To:05/16/2008)						
Insurance			Claim by	No Of Claims	Claim Amt.	Rebill Claims	Rebill Amt	Paid Amt	Pending Rej. Done Rej.
Aarp [13] 17			Paper	7	16,711.00	0	0.00	100.00	0 1
			EMC	15	6,668.00	4	356.00	110.00	0 0
B C / B S Preferred 65 [126] 151			Paper	2	78.00	0	0.00	0.00	0 0
			EMC	7	389.00	0	0.00	0.00	0 0

Failed or Denied Claims

In payment posting, users can add rejection codes to the charge line. These rejected claims appear in this Failed or Denied Claims section. When the rejection is posted, it is pending. Once the balance of the charge is paid or written off (balance is zero) then the rejection is considered done.

Failed or denied claims: ▼ □ □ ×				
Month	Previous Year		This Year	
	Pending	Done	Pending	Done
January	0	2	0	0
February	0	0	0	0

Failed or Denied Claims in follow-up queues

This section is a subset of the above section. In the Collection module, users can add follow-up notes to claim lines. Within the follow-up note, there is a status flag for the note. Any rejected claims that have a follow-up status appear in this section. The follow-up status is the follow-up queue. The status are Pending, In-progress, Waiting and Done.

Options

In each section, there are the following icons: ▼ □ □ ×. The X will close the window. Clicking on the white rectangle allows users to move the window. The black rectangle maximizes the window. The upside-down arrow offers options Maximize, Change Color, Setup Dashboard and Refresh. Maximize the window will expand that box to the entire screen. Change Color changes the background color of that window. Refresh will update all the data with any new activity in the system. Setup Dashboard opens another window where users can edit the display.

NOTES:



Dashboard Options [?] [X]

Option	V	X	Y	Height	Width	Color
Month-to-date collections	<input checked="" type="checkbox"/>	9		956	1225	Alternate
Failed or denied claims	<input checked="" type="checkbox"/>		948	1080	1385	Alternate
Failed or denied claims in follow-up queue	<input checked="" type="checkbox"/>	1381	956	1080	1934	Alternate
Accounts Receivable	<input checked="" type="checkbox"/>	1234		956	2112	Alternate
Insurance Claim Status	<input checked="" type="checkbox"/>	1234		956	1019	Alternate

V= Show in Dashboard

Copy From Other User

Save Close

Place a check in the V column to show that section in the dashboard. The X and Y column dictate the position of each window; these are coordinates with X corresponding to the horizontal position (moving left to right) and Y corresponding to the vertical position (moving top to bottom).

The Height and Width dictate how large the window is. The Color dictates the background color of the window. Alternate will display white and light blue lines. Or choose a fix color to make the background one solid color.

These settings are set per user, but can be copied from other users with the Copy From Other User button.

NOTES:
