



EHR Go Guide: Claims and Ledgers

Introduction

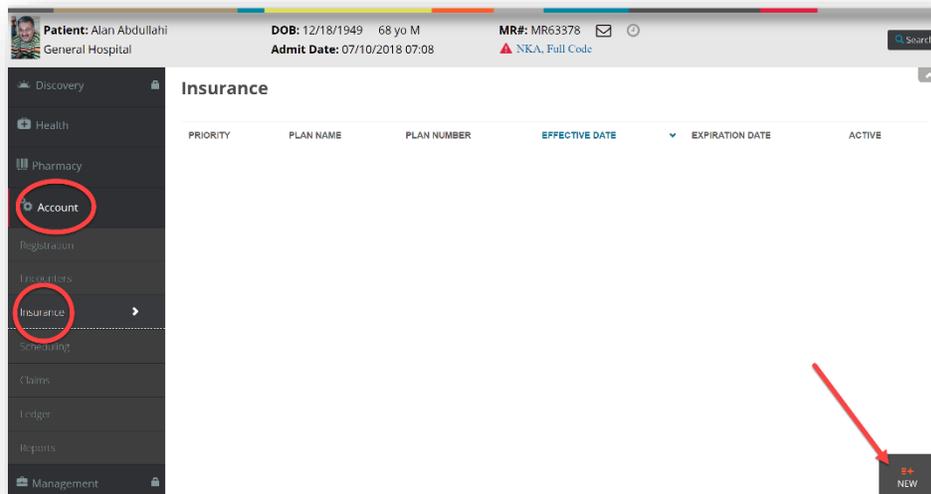
Understanding how to submit patient claims and work with patient ledgers is a vital skill. This guide will provide an overview of how to enter and edit new patient claims as well as how to work with patient ledgers in EHR Go. Please note that not all patients have claim or ledger data entered already.

Additional resources

Students should have a good working knowledge of how to enter information into the EHR.

Working with patient claims

When you launch a patient chart in EHR Go, you will be brought to the Overview tab. Click on the **Account** section to get started. If the patient has insurance and that information has not been added to the chart yet, add it by clicking on the **Insurance** tab. If the patient already has insurance information added or does not have insurance, proceed to the Claims tab and skip to page 3 of this guide. If the patient does not have insurance information added, click **New** in the bottom right of the screen to add this information.





Add the insurance info for the patient and click **Save**. Then click on the **Claims** tab.

The screenshot shows the EHR Go interface for a patient named Alan Abdullahi. The patient's information is displayed at the top, including DOB (12/18/1949), age (68 yo M), MR# (MR63378), and admit date (07/10/2018 07:08). The interface is divided into a left sidebar with navigation tabs and a main content area with several sections.

Navigation Tabs (Left Sidebar): Discovery, Health, Pharmacy, Account, Registration, Encounters, Insurance, Scheduling, Claims, Ledger, Reports.

Overview Section:

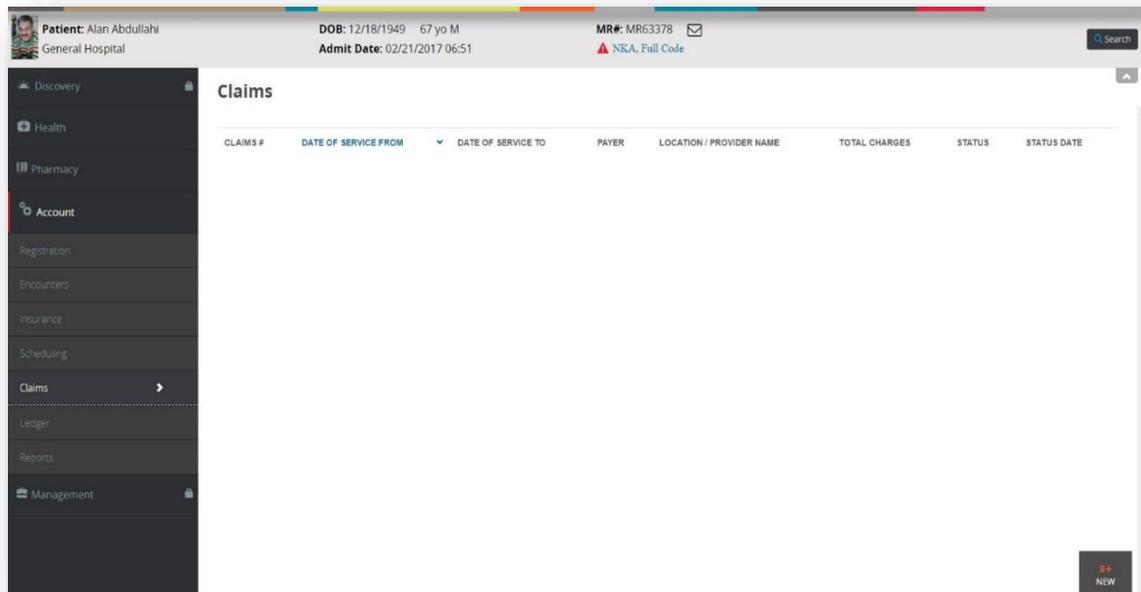
- Patient Info:**

| NAME | CONTACT INFORMATION | PATIENT LANGUAGE | PATIENT RACE/ ETHNICITY |
|-----------------|---|------------------|-------------------------|
| Abdullahi, Alan | 816-555-9676 (Home) 816-555-9676 (Work) 816-555-9676 (Mobile) | English | Other |
- Encounters:**

| DATE | LOCATION | PROVIDER | STATUS | DESCRIPTION |
|------------------|------------------|----------------|--|---|
| 07/10/2018 07:08 | General Hospital | Kerry West, MD | Admitted Stable condition. Transferred from PACU to cardiac unit. On floor. | Post endovascular aneurysm repair (EVAR). |
- Alerts:**

| DATE & TIME | SUBJECT | STATUS | ALERT TYPE |
|------------------|---------|--------|--------------------------|
| 07/10/2018 07:08 | NKA | Active | Adverse Reaction/Allergy |

The Claims tab will be blank if the patient does not have any existing claims. Select **New** to enter a new claim.



There are several features found on this page, and this guide will cover each in detail.

The first section you will see is the Claim Information. Here you can modify a few different fields.

Submit Claim to: Select where you are submitting the claim, be it to the patient’s insurance (if they have insurance) or to the patient themselves. If there is no insurance entered for the patient on the Insurance tab, there will be no options available here.

Status: Select the status of the claim. Your options include: In Progress, Submitted, Approved, Rejected and Denied.

Status Date: By default, the current date will appear and can be modified, if needed.

The **Registration Data** field contains a brief snapshot of the patient’s registration information. If any changes need to be made, clicking on **Modify Registration Data** will bring you to the registration edit page where you can make any necessary changes.



Registration Data

| | |
|-------------|---|
| Account No: | MR63378 |
| Name: | Alan Izra Abdullahi |
| Birth Date: | 12/18/1949 |
| Sex: | Male |
| SSN: | |
| Address: | 1688 Pear Drive Center City, MT, 59211 |
| Phone: | 816-555-9676/816-555-9676 |
| Status: | Married |

[Modify Registration Data](#)

The Insurance Data field contains a brief snapshot of the patient's insurance information, if the patient has insurance information added under the Insurance tab. Clicking on **Modify Insurance** will bring you to the insurance page where you can make any necessary changes.

Insurance Data

| TYPE OF INSURANCE | INSURED'S ID NUMBER | INSURED'S NAME | PATIENT'S RELATIONS TO INSURED |
|-------------------|---------------------|---------------------|--------------------------------|
| Medicare | 00-007 | Alan Izra Abdullahi | Self |

[Modify Insurance](#)

The Appointment Data field shows the patient's appointment history, if applicable. Clicking on **Modify Appointment Data** will allow you to make any necessary changes. Please note this option will only appear if there is an appointment scheduled in the patient's chart.

Appointment Data

| DATE OF APPOINTMENT | PT CONDITION IS RELATED TO | DATE OF CURRENT | ACCEPT ASSIGNMENT |
|------------------------|----------------------------|-----------------|-------------------|
| 02/21/2017 11:30:00 | None | | No |

[Modify Appointment Data](#)



The Diagnosis or Nature of Illness or Injury field will contain all medical diagnoses that are entered and are billable for a patient. A diagnosis is required for processing a claim. To add a diagnosis, click on **Add Diagnosis**.

A screenshot of a software interface showing a table with columns for "Line #", "ICD10 Code", and "Description". The table is currently empty. In the bottom right corner of the table area, there is a blue button labeled "Add Diagnosis".

When you click on **Add Diagnosis** the Add New Diagnosis prompt will be displayed. Here you can search for a diagnosis by entering three or more characters or by searching/entering the ICD10 code. Clicking on **Add** will add the diagnosis to the claim.

A screenshot of a dialog box titled "Add New Diagnosis". It contains a "Line #:" field with the value "1". Below it is an "ICD10 code:" field with a search box containing "J00" and "Acute nasopharyngitis [common cold]". At the bottom right of the dialog are two buttons: "Cancel" and "Add".

The Procedure/Service/Supplies field contains all the information about any procedures performed in relation to a diagnosis. Add a procedure by clicking **Add Procedure**.



| From | To | Place of Service | CPT/HCPCS | Description | Modifier(s) | Diagnosis Pointer | Charges | Days or Units | Rendering Provider |
|-------------------------------|----|------------------|-----------|-------------|-------------|-------------------|---------|---------------|--------------------|
| Add Procedure | | | | | | | | | |

When you click on **Add Procedure**, the Add New Procedure window will be displayed. Here you can modify the following fields as needed: date(s) of service, place of service, rendering provider, CPT/HCPCS, up to four modifiers, the charge for the procedure, days or units, and the diagnosis pointer. Click **Add** when you are finished.

Add New Procedure

Date(s) of Service: 02/21/2017 - 02/21/2017

Place of Service: General Hospital

Rendering Provider: Manuel Bachman, MD

CPT/HCPCS: 80502 Clinical pathology consultation; comprehensive

Modifier 1: SA Nurse practitioner rendering service in collaborator

Modifier 2: Please select

Modifier 3: Please select

Modifier 4: Please select

Charge: 350.00

Days or Units: 1

Diagnosis Pointer: J00 Acute nasopharyngitis [common cold]

When you are finished working with the claim, there are three options:

Option 1: Clicking on **Post and Save** will post the claim to the patient's ledger.



Option 2: Clicking on **Save Without Posting** will save your work but **will not** post the claim to the patient's ledger.

Option 3: If you are completely dissatisfied with what you have done or want to start the process over, click on **Cancel**.

If you select **Post and Save** or **Save Without Posting**, you will be brought back to the claims page and will see your newly entered claim.

The screenshot shows a web interface titled "Claims". It features a table with the following columns: CLAIMS #, DATE OF SERVICE FROM, DATE OF SERVICE TO, PAYER, LOCATION / PROVIDER NAME, TOTAL CHARGES, STATUS, and STATUS DATE. A single claim is listed with the following details:

| CLAIMS # | DATE OF SERVICE FROM | DATE OF SERVICE TO | PAYER | LOCATION / PROVIDER NAME | TOTAL CHARGES | STATUS | STATUS DATE |
|----------|----------------------|--------------------|------------|-------------------------------------|---------------|-----------|------------------|
| 1 | 02/21/2017 | 02/21/2017 | Healthwise | General Hospital/Manuel Bachman, MD | \$ 350.00 | Submitted | 02/21/2017 09:09 |

At the bottom right of the interface, there is a button labeled "NEW" with a plus sign icon.

If you click on the claim itself, you will be brought to the Claim Details page where you can view the claim and decide if you need to Edit or Delete the claim. Select **Edit** if you would like to post a claim that was not posted previously. Clicking **Close** will close out the Claim Details page.



Claim Details

| TYPE OF INSURANCE | INSURED'S ID NUMBER | INSURED'S NAME | PATIENT'S RELATIONS TO INSURED |
|-------------------|---------------------|---------------------|--------------------------------|
| Medicare | 00-007 | Alan Izra Abdullahi | Self |

Appointment Data

| DATE OF APPOINTMENT | PT CONDITION IS RELATED TO | DATE OF CURRENT | ACCEPT ASSIGNMENT |
|------------------------|----------------------------|-----------------|-------------------|
| 02/21/2017 11:30:00 | None | | No |

Diagnosis or Nature of illness or injury

| LINE # | ICD10 CODE | DESCRIPTION |
|--------|------------|-------------------------------------|
| 1 | J00 | Acute nasopharyngitis [common cold] |

Procedure/Service/Supplies

| FROM | TO | PLACE OF SERVICE | CPT/HCPCS | DESCRIPTION | MODIFIER(S) | DIAGNOSIS POINTER | CHARGES | DAYS OR UNITS | RENDERING PROVIDER |
|------------|------------|------------------|-----------|--|-------------|-------------------|-----------|---------------|--------------------|
| 02/21/2017 | 02/21/2017 | General Hospital | 80502 | Clinical pathology consultation; comprehensive, for a complex diagnostic problem, with review of patient's history and medical records | SA | J00 | \$ 350.00 | 1 | Manuel Bachman, MD |

EDIT DELETED CLOSE

Working with patient ledgers

To access the patient's ledger, click on **Ledger** below the **Accounts** tab.



| BALANCE | | TOTAL |
|---------|--|---------|
| Account | | \$ 0.00 |
| Patient | | \$ 0.00 |

| DATE | CLAIM # | DESCRIPTION | TOTAL CHARGES | STATUS |
|------|---------|-------------|---------------|--------|
|------|---------|-------------|---------------|--------|

| DATE | CLAIM # | TRAN # | DESC | AMOUNT |
|------|---------|--------|------|--------|
|------|---------|--------|------|--------|

[Add Adjustment](#)

If your patient has a claim in the system, then you will see some of the data for the patient's ledger is already filled out. If the patient has no claim, the ledger will contain no data.

There are three different fields you can interact with on this page: Adjustments, Patient Payments, Payor Payments.

To modify Adjustments, click on **Add Adjustment**.

| DATE | CLAIM # | TRAN # | DESC | AMOUNT |
|------|---------|--------|------|--------|
|------|---------|--------|------|--------|

[Add Adjustment](#)

This will bring up the Add Adjustment prompt. Fill out the appropriate information as needed. One thing to keep in mind is that you must only enter positive numbers in the Adjustment Amount field. The Credit and Debit radio buttons determine if the amount entered will be subtracted from or added to the account. Click on **Preview** to verify your entry.



Add Adjustment

Select Date: 02/21/2017 

Adjustment Note:

Select Claim: *

Service Code: *

Transfer Balance:
 Yes
 No

Adjustment From: *

Transaction Code: *

Adjustment Type: *
 Credit
 Debit

Adjustment Amount: *

PREVIEW **CANCEL**

If you are satisfied with the adjustment, click on **Post Changes**. Otherwise click on **Cancel** to change any errors.

Preview

| | OLD BALANCE | NEW BALANCE |
|------------|-------------|-------------|
| Account | \$ 350.00 | \$ 325.00 |
| Patient | \$ 0.00 | \$ -25.00 |
| Healthwise | \$ 350.00 | \$ 350.00 |

| DATE | CLAIM # | TRAN # | DESC | AMOUNT |
|------------|---------|--------|-------------------------------|----------|
| 02/21/2017 | 1 | 47111 | Patient Responsibility: Copay | \$ 25.00 |

To modify Patient Payments, click on **Add Patient Payment**.

Patient Payments

| DATE | CLAIM # | TRAN # | DESC | AMOUNT |
|--|---------|--------|------|--------|
| <input type="button" value="Add Patient Payment"/> | | | | |

This will bring up the Add Patient Payment prompt. Fill out the appropriate information as needed. One thing to keep in mind is that you must only enter positive numbers in the Payment Amount field. The Payment and Payment Reversal radio buttons determine if the amount entered will be subtracted from or added to the account. Click on **Preview** to verify your entry and, if the information is correctly entered, click on **Post Changes**.



To modify Payor Payments, click on **Add Payor Payment**.



This will bring up the Add Payor Payment prompt. Fill out the appropriate information as needed. One thing to keep in mind is that you must only enter positive numbers in the Payor Payment Amount field. The Payment and Payment Reversal radio buttons determine if the amount entered will be subtracted from or added to the account. Click on **Preview** to verify your entry and if the information is correctly entered, click on **Post Changes**.

Any changes made to the patient's ledger will be reflected in the Practice Management Summary field at the top of the Patient Ledger page.

Submitting your work

Activities in Go instruct you to submit either your Progress Report or Word document to your instructor through your Learning Management System (LMS). Your instructor will provide additional information if he or she prefers that you use another method to turn in your work, such as through email or by printing a hard copy. There is no other way for the instructor to view your work in EHR Go unless you submit the document to them.