Marking Claims "Ready to Bill"

Quick Reference Guide for RCM Clients

You may notice some new changes!

OP has a new feature as of the February 2020 release! This feature allows your office to mark things "Ready for RCM" in a different way than before. As most of you are aware, marking something "Ready for RCM" or "Ready for PBS" signals to your team here at OP that the claim is ready to go out the door. Until now, you marked claims ready by changing the Visit Status in the tracking screen.

So what's new?

In the new release, you will see an option under your Billing Status column in the tracking screen to mark something "Ready to Bill". This option will be **replacing** the use of visit status, so that we can keep clinical and billing statuses separate. See below screenshot of new option under the Billing Status column:

Reason	TOV	Arrival	🕐	Room	Visit Status	Min. Σ	Tasks	Billing Status	Superbill Stage	Ins. Valid	✔
(COUNT=21)											
Circumcision check	FOLLOW-UP	02:03 PM		ROOM 1	MD: Finalized visit			Ready to Bill	Ready	1/28/2020	

So how does it work?

When your office has confirmed that a claim is ready to go out the door, please change the Billing Status to "Ready to Bill". This will indicate to our team that the superbill is ready to be converted. Once we have converted the superbill, the billing status will change to "Completed" as it had done in the past to indicate that this claim has been converted and submitted. This release also includes the ability to track all of the changes to both visit status and billing status. To see the audit trail on either of these fields, click the Σ sign in the patient's visit row.
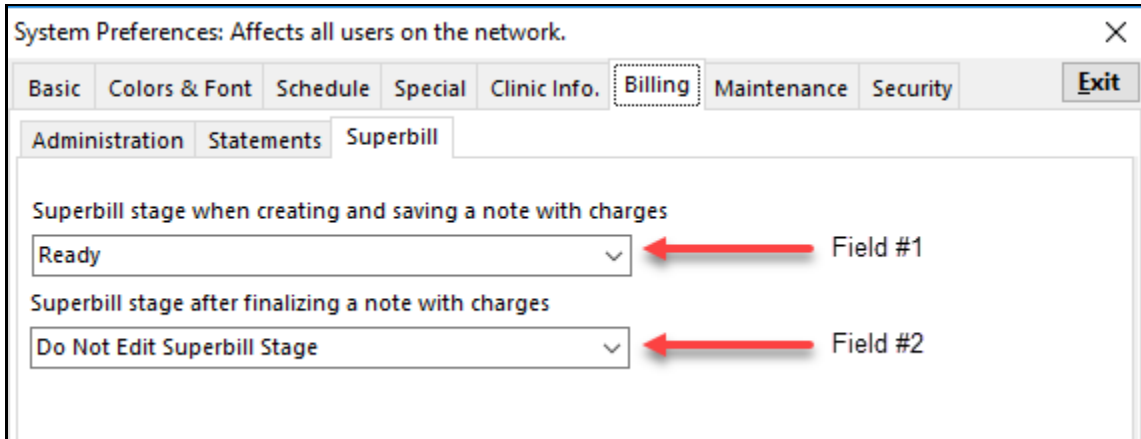
What else?

You may also have noticed the "Superbill Stage" column in the screenshot above. As you are aware, our team has been using superbill stages to identify items that need to be reviewed by your office before they actually go out the door. These can be things like superbills that are missing a diagnosis, missing active credentials, or missing insurance. The superbill stage will automatically be set to Ready as it has been in the past. There may be some scenarios in which it makes sense for your superbills to start in a different stage, which we will outline below. **Please note that our team is specifically looking at the "Ready to Bill" column.** If you are using the superbill stages to track additional steps in-office, you will want to ensure that the superbill is in a Ready state before you mark something "Ready to Bill". Superbill Stage will need to be added to your view of the schedule by using the upper left field selector.

How do I change the superbill status fields initial stages?

Admin → Global Preferences → Billing → Superbill
The top field in the below will be what stage your superbills are generated in. The second field in the below will be what stage your superbills change to (if any) once the provider has finalized the note. Keep in mind that it is the rendering provider finalizing the note, not a co-signer signing the note, that will activate the second field.

**Do Not Edit Superbill Stage is indicative of no change occurring to the superbill.

Possible Scenarios	Field Selections	Next Steps
Scenario 1: My provider marks his/her claims Ready to Bill.	Field #1: Leave as Ready Field #2: Leave as Do Not Edit Superbill Stage	Your provider can mark his/her claims Ready to Bill from the coding tab of the visit.
Scenario 2: Someone in my office reviews claims after the provider is finished, before marking Ready to Bill.	Field #1: Change to Hold - Coding Review Field #2: Leave as Do Not Edit Superbill Stage	Once a superbill is created, your in-house team can review the superbills from tracking. You will want to change the superbill stage to Ready and the Billing Status to Ready to Bill at this point.
Scenario 3: My provider only wants claims to go out when he/she has finalized the note.	Field #1: Change to Hold-Not Finalized Field #2: Change to Ready	Your provider can mark his/her claims Ready to Bill from the encounter/well visit note screens after confirming & finalizing the note.
Scenario 4: Once my provider finalizes the note, then someone in my office is reviewing claims before marking Ready to Bill.	Field #1: Change to Hold-Not Finalized Field #2: Change to Hold-Coding Review	Once a chart associated with a superbill is finalized, your in-house team can review the superbills from tracking. You will want to change the superbill stage to Ready and the Billing Status to Ready to Bill.