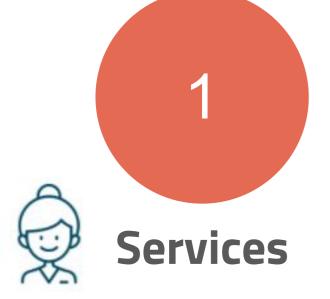# Billing Engine Workflow Overview

1 — Services

Providers perform Services which are passed to the Billing Engine via Notes, Forms, Census, Scheduler, or manual entry.

Activity Codes are attached to Services and represent the activity performed by the Provider. Services are not billable until they become Line Items.

2 — Line Items

Services are converted to Line Items using the Recalc functionality in the Billing Engine. Each Line Item consists of a responsible party, an associated dollar value, and a Procedure Code. If Recalc finds an issue with the Service, the user is informed of a Bill Status error, which can be corrected for the Service to be successfully converted to a Line Item.

3 — Claims

Line Items are packaged into Claim Files and are either electronically sent to Insurance Payers or are printed on paper claim forms. To prevent sent Line Items from being picked up in another Claim File, the Print Status must be updated to "N" for each Line Item.

4 — Payments

Insurance Payers process claim files and send payments or denials for Line Items. The responsible party and payment method determine how payments are posted. Client payments are entered from the Scheduler, Payment Center, or Client Portal. Electronic Remittance Advices (ERAs) are imported into the Billing Engine and applied. Paper EOBs are manually entered in the Transactions Form.