

Overview:

The project involved integrating billing and insurance functionalities with the existing Practice Management System for a highly respected and well-established player. The existing PMS was a cloud-based system that helped to manage the medical records and track laboratory inventory. The need of the hour was to integrate the Billing facilities which would enable the client to focus on the evolving need of their customers. This project helped them to simplify the workflow and increase their online presence. The client used the application as a one-stop solution to manage their day's schedules and events accordingly.

Client details:

Name: Confidential | **Industry:** Healthcare | **Location:** USA

Technologies:

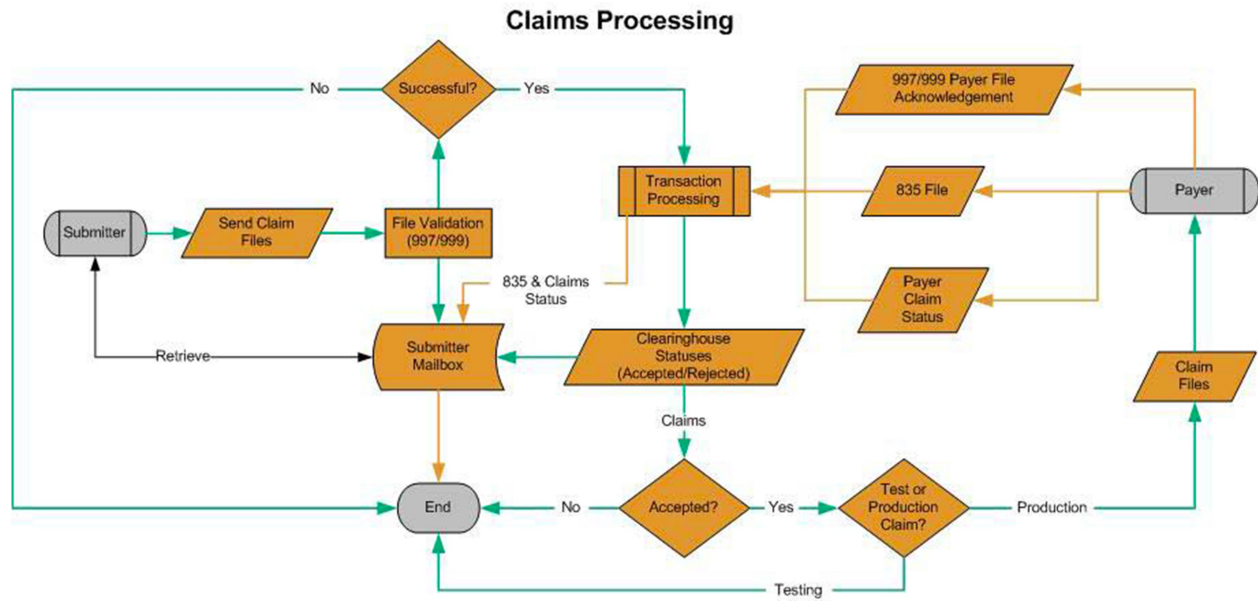
PHP, MySQL, JavaScript, ExtJs, Emdeon (Clearing House) APIs, SOAP, HG

Project Description:

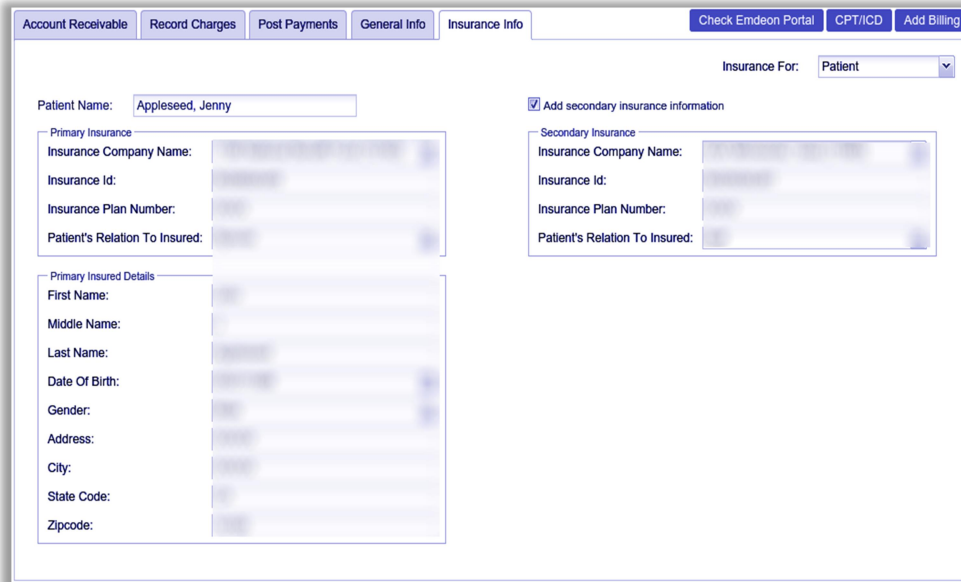
Earlier, the client used to handle the billing process manually that became cost-ineffective and cumbersome. After analyzing the client's need, team@Mindfire offered to integrate a billing and insurance module into the Program Management System. Additionally, features like customized billing plans were implemented into the software. The team ensured the software would be compliant with the laws and regulations and allow the client to submit electronic claims via a clearinghouse. It was critical to have an intuitive and user-friendly UI/UX, which helps ease the process and eliminate possibilities of lag. Some salient features of the application:

- The Client/Admin can view the Patient information in the dashboard and use the insurance pull-down menu to view the insurance details for the patient. This portal allows users to view and edit the necessary information like Insurance Company, insurance ID, and plan number for the patient.
- The admin can click on the “Add Billing” button to generate a new invoice for the patient. Invoice Details are entered from the pull-down menu like date of service, provider name, provider's office location, etc.
- Various categories for Billing were enabled like Bill Insurance (BI), Bill Patient (BP), Bill Insurance Only (BIO), Bill Patient Only (BPO), Bill insurance/MD to Review (BIR), Contracted (C), Global-Patient reimbursement (GPT), Global-Practice recovery (GPR), etc.
- The client requested a customized billing plan, which was implemented by the team. The billing charges are customized based on packages or based on service.
- The software generates an 837 claim file while submitting an invoice for the target invoice and then converts the contents of the 837 claims to a base64 encoded string. The encoded string is uploaded to the Clearing House. Basic level validations are performed for some fields that are necessary to send a claim.
- The admin can track the ERA (Electronic Remit Advice) Status of a claim and click on the view invoice button to view or print the invoices.
- Certification for a new implementation requires the successful submission of 100 test claims with a 95% acceptance rate. Certification for conversion begins by submitting the same number of test claims as an average day's production volume in a minimum of three files. The rejection rate on the test claims in a conversion project cannot exceed the current production-level rejection rate.
- The practice will receive confirmation from its Implementation Analyst in the form of a certification letter. Once certified, the client will receive the credentials and authorization necessary to submit its claims in live production.

Flow Diagram: Claim Processing



Screenshots



Account Receivable | Record Charges | Post Payments | General Info | **Insurance Info** | Check Emdeon Portal | CPT/ICD | Add Billing

Insurance For: Patient

Patient Name: Appleseed, Jenny

☒ Add secondary insurance information

Primary Insurance

Insurance Company Name: [Field]
 Insurance Id: [Field]
 Insurance Plan Number: [Field]
 Patient's Relation To Insured: [Field]

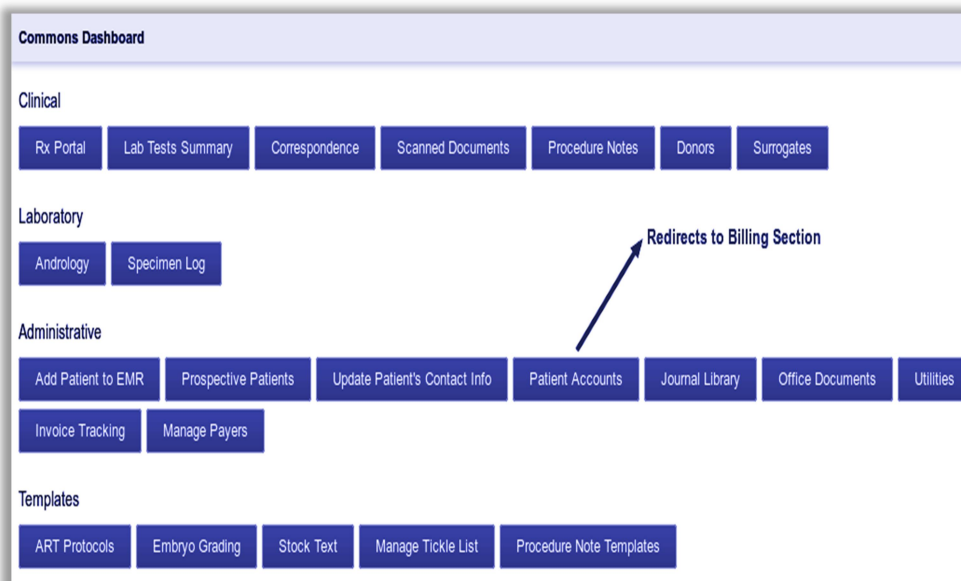
Secondary Insurance

Insurance Company Name: [Field]
 Insurance Id: [Field]
 Insurance Plan Number: [Field]
 Patient's Relation To Insured: [Field]

Primary Insured Details

First Name: [Field]
 Middle Name: [Field]
 Last Name: [Field]
 Date Of Birth: [Field]
 Gender: [Field]
 Address: [Field]
 City: [Field]
 State Code: [Field]
 Zipcode: [Field]

Screenshot 1: Patient Information



Commons Dashboard

Clinical

Rx Portal | Lab Tests Summary | Correspondence | Scanned Documents | Procedure Notes | Donors | Surrogates

Laboratory

Andrology | Specimen Log

Administrative

Add Patient to EMR | Prospective Patients | Update Patient's Contact Info | Patient Accounts | Journal Library | Office Documents | Utilities

Invoice Tracking | Manage Payers

Templates

ART Protocols | Embryo Grading | Stock Text | Manage Tickle List | Procedure Note Templates

Redirects to Billing Section

PMS Integration with Billing and Insurance



Screenshot 2: Billing Module

Select Patient

1000704

DOS	Status	Balance
03/12/2015	Open	120
03/11/2015	Open	438.9
03/10/2015	Open	200

Account Receivable

Account Receivable - total : **\$758.9**

Account Receivable < 30 days : **\$0**

Account Receivable - 30 days : **\$0**

Account Receivable - 60 days : **\$0**

Account Receivable - 90 days : **\$758.9**

Print Reports

- Print Receivable (< 30 days)
- Print Receivable (30 days)
- Print Receivable (60 days)
- Print Receivable (90 days)

Print Collections(Day Sheet):

Select Date:

Add new invoice for the patient

Selected Patient's Invoice List

(highlighted row represents that invoice is meant for Partner)

Screenshot 3: Add new Invoices

A-1000704

Create Invoice

100704

Insurance: Blue Shield

Print Invoice

* Date of service:

* Provider:

* Office Location:

* Invoice For:

Procedure	Diagnosis	#units	Billing terms	Billing instructions	Prof fee	% U&C	Amt due
case management	Abdominal pain	1	F	BI	120.00	100.00	25

case management

- Cervical dilation
- Cervical dilator insertion
- CF carrier status
- consultation, 40 minutes
- consultation, 60 minutes
- consultation, 80 minutes
- DHEA 25 mg tabs, #60
- diagnostic hysteroscopy
- diagnostic laparoscopy
- donor compensation
- donor evaluation
- donor recruitment
- embryo transfer
- embryo transfer, mock

Save Cancel

Screenshot 4: Billing Amount

PMS Integration with Billing and Insurance



Account Receivable | Record Charges | Post Payments | General Info | Insurance Info | Check Emdeon Portal | CPT/ICD | Add Billing

Record Charges Claim Status → ERA received. Check procedure payments in 'Post Payments' tab

Invoice #: 1000047

Service Type: 11- Office Date of service:

Location: Provider:

Procedure	Diagnosis	#units	Billing terms	Prof fee	Amt due	Billing instructions	% U&C	Collect at TOS
oocyte retrieval	Infertility associated with anovulation	2	F	3000	240.00	C	100.00	30.00
intrauterine insemination	Habitual abortion	1	Pkg	185	0.00	BI	100.00	70.00

Instructions:
Instructions

Amount Received on DOS:

Payment Made By:

[View Invoice](#) [Invoice History](#) [Claim History](#) [Upload Claim](#)

Screenshot 5: Claim Status

Date of Service: 09/20/2014 Invoice #: 5901

Service	Diagnosis	#units	Prof fee	Amt due	Payment
IUI prep (sperm washing)	Abdominal	1	150	60.76	
consultation, 60 minutes	Absence of menstruation	1	250	250	
hysterosalpingography, anesthesia for	Anterior pituitary disorders, other	1	150	0	
Total:			550	310.76	0

Instructions

*Prof fee: practice's usual and customary professional fee for this service.
*Amount due today: current amount payable at the time of service. This amount may reflect any discounts offered by the practice or from any discount that the practice provides based on your insurance contract. Please note that you are responsible for any unpaid balance (up to the limits of your copay and/or deductible) in the event that your insurance does not provide full reimbursement for the professional services that have been rendered.

Screenshot 6: Print Invoice