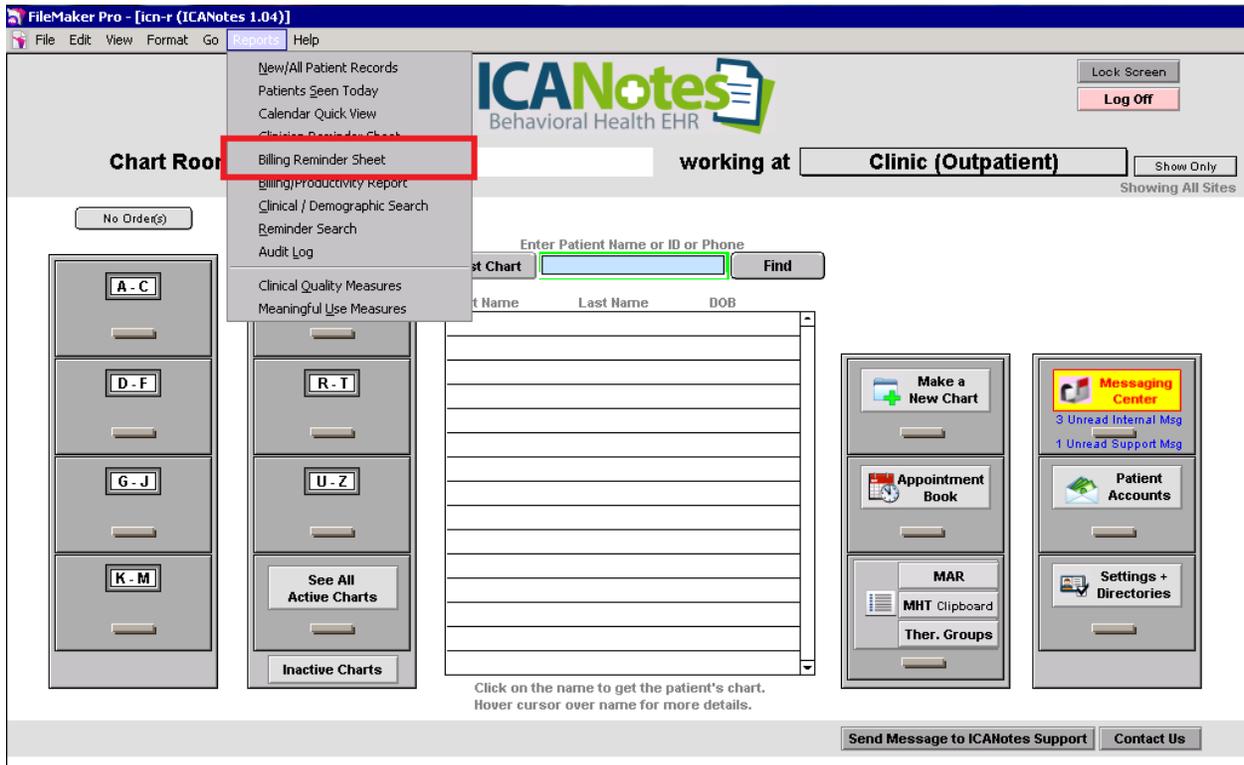


How to Use the Billing Reminder Sheet

The Billing Reminder Sheet is a report that lists scheduled appointments between a specific date range. If your practice is not using the ICANotes Appointment Book, then this report will not yield any data. If you are using the ICANotes Appointment Book, this report is very useful to front office staff for quickly checking in a patient and collecting payment.

You can access the Billing Reminder Sheet from the Reports dropdown menu in the upper left corner of your ICANotes session.



The date range will automatically default to the current date for your convenience. If you wish to look at past or future appointments, you may adjust the date range and use the “Generate Report” button to refresh the report. The report may be printed anytime using the “Print Report” button.



Checking “Show Appointments without a Service Charge ONLY” will only show appointments scheduled for patients who do not have any charge recorded in their patient account.

Checking “Show Block Outs” will include any blocked out time on a clinician’s calendar in this report. These are filtered out by default because they are not typically associated with a patient appointment.

Here is what a generated Billing Reminder Sheet may look like:

ICANotes Behavioral Health EHR

Chart Room Last Chart Face

Billing Reminder Sheet

Show Appointments between 9/16/2014 (up to 1 month) 9/16/2014

Generate Report
Print Report
Export Report

Account Activity exists for visit
 No Account Activity exists for visit

Show Appointments without a Service Charge ONLY

Show Block Outs

Site:

Clinician: Courtney [Send Message to Clinician](#)

Tue, Sep 16, 2014

Appointment	Account Activity	Actions
Down, Daniel Starts 10:00 AM Ends 10:30 AM 30 min Follow Appt. Status: Attended Appt. Length: 0:30	Account activity on 9/16/2014 ONLY Total Charged \$125.00 Total Patient Paid \$20.00 Total Insurance Paid \$0.00 Total Due \$105.00	<input checked="" type="checkbox"/> Note Created <input type="checkbox"/> Note Compiled <input type="checkbox"/> Note Signed <input type="checkbox"/> Claim Submitted Chart Face
Fish, Howard Starts 11:00 AM Ends 11:30 AM 30 min Follow Appt. Status: Scheduled Appt. Length: 0:30	Account activity on 9/16/2014 ONLY Total Charged Total Patient Paid Total Insurance Paid Co pay \$20.00 Total Due	<input checked="" type="checkbox"/> Note Created <input checked="" type="checkbox"/> Note Compiled <input type="checkbox"/> Note Signed <input type="checkbox"/> Claim Submitted Chart Face
Jones, Kyle Starts 1:00 PM Ends 2:00 PM Initial Appt. Status: Scheduled Appt. Length: 1:00	Account activity on 9/16/2014 ONLY Total Charged Total Patient Paid Total Insurance Paid Co pay \$20.00 Total Due	<input type="checkbox"/> Note Created <input type="checkbox"/> Note Compiled <input type="checkbox"/> Note Signed <input type="checkbox"/> Claim Submitted Chart Face

The report displays three columns of data. Appointments are separated by assigned clinician and are listed in order starting with the earliest appointment.

Clinician: Courtney

Tue, Sep 16, 2014

Down, Daniel Starts 10:00 AM Ends 10:30 AM 30 min Follow Appt. Status: Attended Appt. Length: 0:30	Check In	Appointment Detail
Fish, Howard Starts 11:00 AM Ends 11:30 AM 30 min Follow Appt. Status: Scheduled Appt. Length: 0:30	Check In	Appointment Detail
Jones, Kyle Starts 1:00 PM Ends 2:00 PM Initial Appt. Status: Scheduled Appt. Length: 1:00	Check In	Appointment Detail

Left Column – Shows the appointment with details. The color indicates the appointment status. In the first example above, the background is purple, which means the patient has been checked in and has attended the appointment. It is easy for front office staff to check patients in from this report by clicking on the gray “Check In” button. The “Appointment Detail” button pulls up a read-only window which contains the appointment detail from the Appointment Book.

Account activity on 9/16/2014 ONLY Total Charged \$125.00 Total Patient Paid \$20.00 Total Insurance Paid \$0.00 Total Due \$105.00	Patient Account
Account activity on 9/16/2014 ONLY Total Charged Total Patient Paid Total Insurance Paid Co pay \$20.00 Total Due	Patient Account
Account activity on 9/16/2014 ONLY Total Charged Total Patient Paid Total Insurance Paid Co pay \$20.00 Total Due	Patient Account

Middle Column – Shows the patient’s account activity. If the background color is green, then account activity exists for the visit. If red, no account activity exists for the visit. At check in or check out, the front office staff may click on the “Patient Account” button to open up the patient’s account and record the charge and payment, if collected. After recording a payment in the patient’s account, the “Back” button can be used to return to this report. Here is a screenshot of the Back button in Patient Accounts:

FileMaker Pro - [Patient Accounts]

File Edit View Format Go Reports Help

Patient Account Batch Statements Reports Auto Post Payments Manual Post Payments [Chart Room](#) [Back](#)

[Find](#)
 (2-6-1981) #098
 Account ID# 1000011744902

[Chart Face](#) [Demographics](#) [Make Appointment](#) [Internal Message](#)

Account Activity | Statements | Patient Information | Billing Notes | Claims | UB04

<input checked="" type="checkbox"/> Note Created	<input type="button" value="Chart Face"/>
<input type="checkbox"/> Note Compiled	
<input type="checkbox"/> Note Signed	
<input type="checkbox"/> Claim Submitted	
<input checked="" type="checkbox"/> Note Created	<input type="button" value="Chart Face"/>
<input checked="" type="checkbox"/> Note Compiled	
<input type="checkbox"/> Note Signed	
<input type="checkbox"/> Claim Submitted	
<input type="checkbox"/> Note Created	<input type="button" value="Chart Face"/>
<input type="checkbox"/> Note Compiled	
<input type="checkbox"/> Note Signed	
<input type="checkbox"/> Claim Submitted	

Right Column – Shows if a note has been created and compiled for the visit and if a claim has been submitted. ***This is an important column for both front office staff and billing staff to review.*** If the clinician has not created a note for the patient by the time a payment or copay is collected, the front office staff will know they need to go back at the end of the day and link the charge recorded in Patient Accounts to the note created by the clinician. To avoid this extra step, many practices will collect the payment/copay at check out so the clinician has time to open the note that will be linked to the charge. **Note: the note does not have to be compiled for the charge to be linked to the note, the note only has to be created.** The clinician can go back and finish the note later in the day if needed.

The “Claim Submitted” checkbox is handy for billing staff. If billing electronically in ICANotes, billing staff should review this report before submitting electronic claims. The report will show whether:

- The clinician did their work (created a note for each visit and e-signed the note) so the claims for all of the day’s services are ready to bill
- OR the clinician has not created a note for each visit and until they do so the biller cannot send out electronic claims for those missing dates of service.

Billing or office staff may use the “Send Message to Clinician” button to send an internal message to the clinician for any reason.

Billing Reminder Sheet

Behavioral Health EHR | Chart Room | Last Chart Face

Show Appointments between 9/16/2014 (up to 1 month) 9/16/2014

Show Appointments without a Service Charge ONLY Show Block Outs

Site: **Clinician: Courtney**

Tue, Sep 16, 2014

Down, Daniel 30 min Follow Appt. Status: Attended Appt. Length: 0:30	Starts 10:00 AM Ends 10:30 AM <input type="button" value="Check In"/> <input type="button" value="Appointment Detail"/>	Account activity on 9/16/2014 ONLY Total Charged \$125.00 Total Patient Paid \$20.00 Total Insurance Paid \$0.00 Total Due \$105.00 <input type="button" value="Patient Account"/>	<input checked="" type="checkbox"/> Note Created <input type="checkbox"/> Note Compiled <input type="checkbox"/> Note Signed <input type="checkbox"/> Claim Submitted <input type="button" value="Chart Face"/>
Fish, Howard 30 min Follow	Starts 11:00 AM Ends 11:30 AM <input type="button" value="Check In"/>	Account activity on 9/16/2014 ONLY Total Charged Total Patient Paid <input type="button" value="Patient Account"/>	<input checked="" type="checkbox"/> Note Created <input checked="" type="checkbox"/> Note Compiled <input type="checkbox"/> Note Signed <input type="checkbox"/> Claim Submitted <input type="button" value="Chart Face"/>