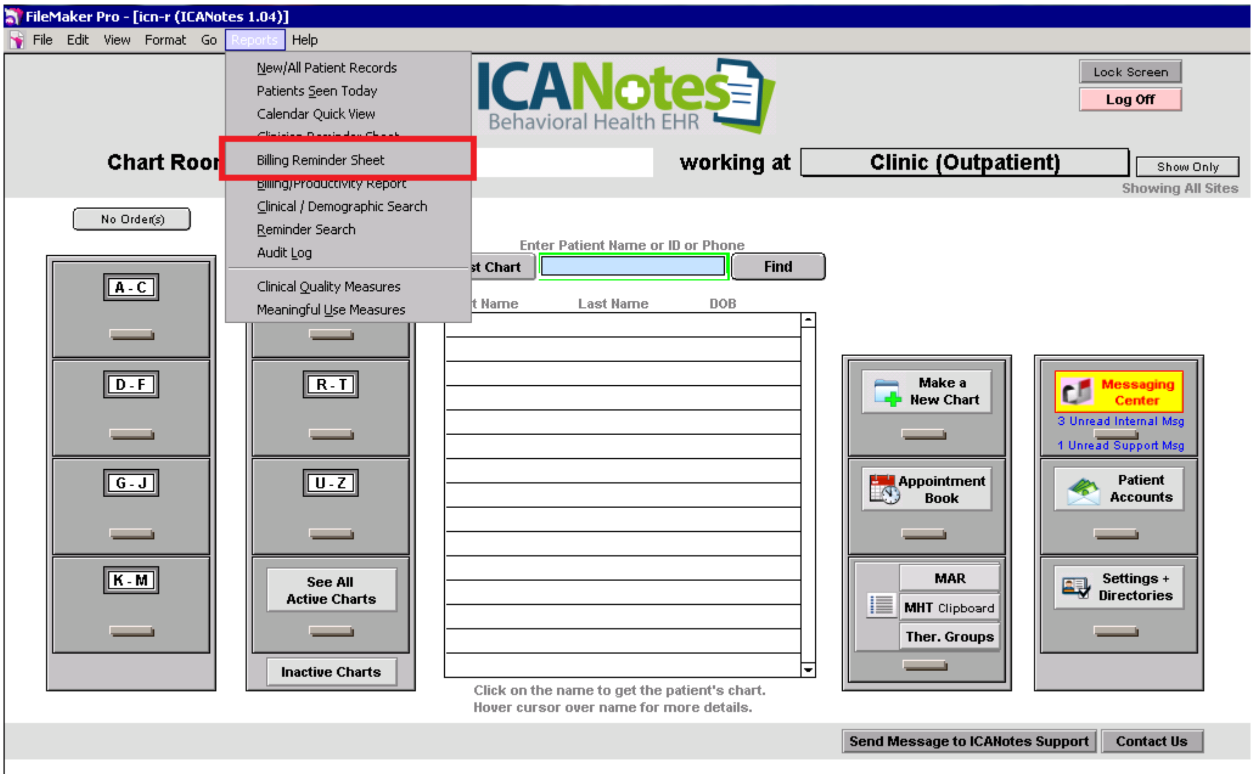
How to Use the Billing Reminder Sheet

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.

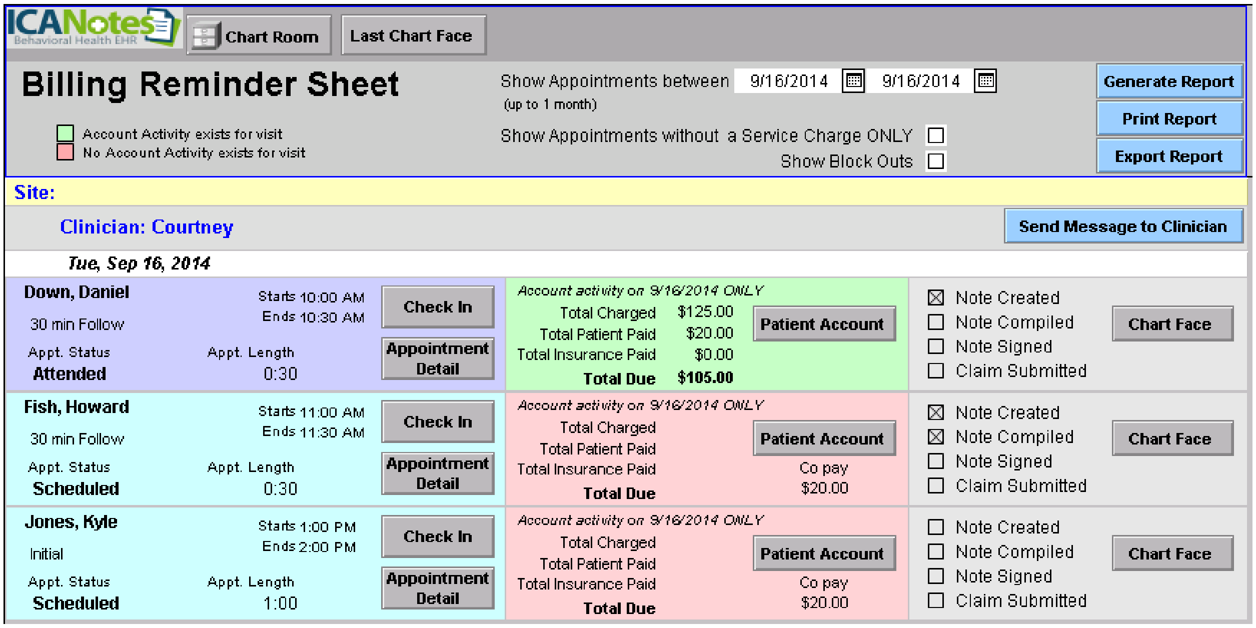


The date range will automatically default to the current date for your convenience. If you wish to look at past or future appointments, you may adjust the date range and use the “Generate Report” button to refresh the report. The report may be printed anytime using the “Print Report” button.

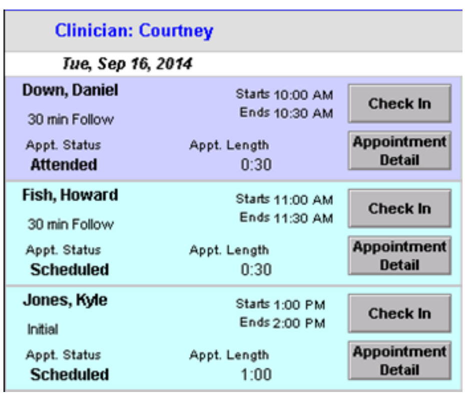
Checking “Show Appointments without a Service Charge ONLY” will only show appointments scheduled for patients who do not have any charge recorded in their patient account.

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.

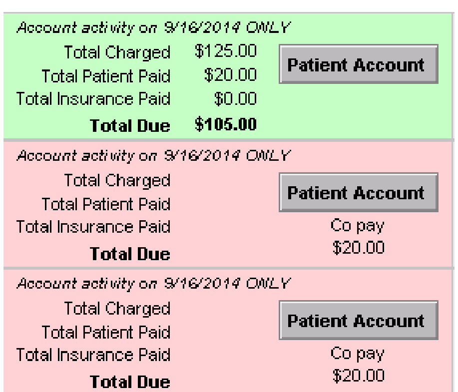
Here is what a generated Billing Reminder Sheet may look like:



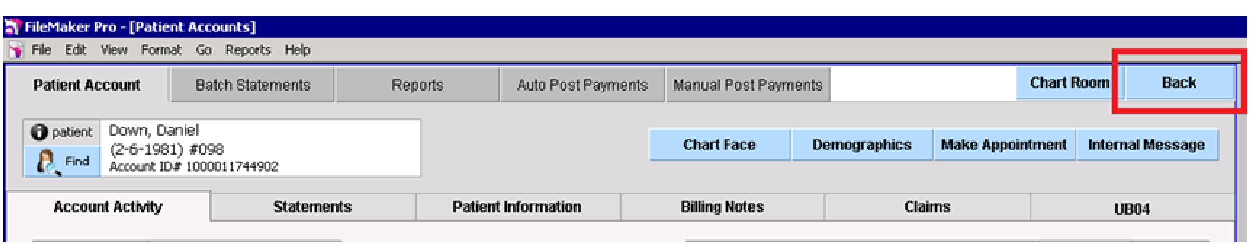
The report displays three columns of data. Appointments are separated by assigned clinician and are listed in order starting with the earliest appointment.

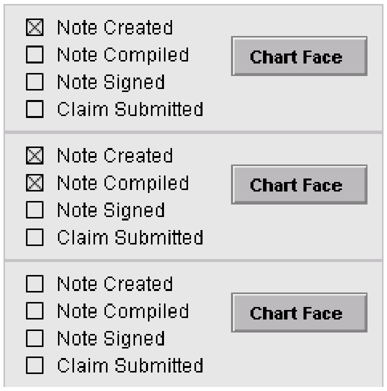


__Left Column__ – Shows the appointment with details. The color indicates the appointment status. In the first example above, the background is purple, which means the patient has been checked in and has attended the appointment. It is easy for front office staff to check patients in from this report 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.



__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:





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.