

# Getting to Know the Billing Menu

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Click on each **blue** title on each item below for additional information.

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Insurance Credit Card Payments		
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Product/Procedure		
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- **Billing Summary:** An overview of your financials comparing the current month to the previous, quarter-to-date to the previous, and year-to-date
- **Live Claims Feed:** A comprehensive way of viewing your claims and where they are in the RCM cycle
- **Patient Payments:** Displays a list of patients with an open balance and also provides payment history from the patient
- **Day Sheet:** Designed to provide a daily snapshot of your finances, detailing charges, credits/adjustments, and insurance/patient payments.
- **Transactions:** Provides an appointment-by-appointment view detailing the diagnostics, services, inventory code used, quantities, amount billed, adjustments, insurance paid, and patient paid.
- **Remittance Reports:** Tracks your electronic ERAs and paper EOBs
- **Unmatched ERAs:** If there is a response from the payer on an ERA that cannot be matched to an appointment will post here. They could be appointments billed out of a different/previous system.
- **Insurance Credit Card Payments:** A place to process and store insurance payments made via virtual credit cards
- **Accounts Receivable:** A summary of outstanding insurance and patient receivables
- **Patient Statements:** Displays a detailed view of patient payments and balances but focuses on generating and tracking statements.
- **Product/Procedure:** Keeps track of the products and services you have billed to your patients/payers and tracks the statistics (units, charges, insurance, patient payment, adjustment).
- **Patient Balance Ledger:** Views the combined insurance + patient payment to see how it contributes to the bottom line.
- **Fee Schedule:** This allows you to set up your services and the prices associated

- **Underpaid Items:** Will document instances of underpayment by a payer, if the expected reimbursement amount is loaded into the fee schedule with the payer id.
  - **Adjustment Master:** An easy way to view and manage the adjustments on your claims.
  - **Sales Tax:** Allows you to track prices pre and post-taxes and the tax amount paid.
  - **Billing Log:** A complete log of billing changes, including changes your staff members have made.
  - **Enrollment:** A portal that allows the requesting of EDI and ERA enrollments to eProvider Solutions clearinghouse.
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