

Quick Reference Guide: Creating Past Due Statements

Use the following procedure when you need to create past due statements.

1. Go to the **Billing Queue**, filter by **Self Pay** from the drop-down payer list and claim status of **Outstanding**. Sort by **Patient**.

Billing

The screenshot shows the 'Billing' interface with a 'Download Claims' button. Below it is a 'Quick Filter Sets' dropdown. The main filter area includes:

- Payers - 1** (highlighted with a red box)
- Plans
- Branches
- Claim Status - 1** (highlighted with a red box)
- Claim Type
- Start Date
- End Date

 At the bottom, there are buttons for 'Outstanding x', 'Self Pay x', and 'Reset All Filters'.

2. If a patient has just one Outstanding Claim, you can select **Print** from the **Actions** drop down on the right side of the claim line item.

⇅ Payer - Plan	⇅ Claim Type	⇅ Claim Dates	⇅ Billed Amt	⇅ Reimb Bal	⇅ Form Type	⇅ Follow Up	Actions
Self Pay - Self Pay	FFS - FFS	09/01/2017 - 09/09/2017	\$1,350.00	\$904.57	Invoice		Actions
Self Pay - Self Pay	FFS - FFS	04/22/2018 - 04/27/2018	\$600.00	-\$10.00	Invoice		Charges
Self Pay - Self Pay	FFS - FFS	01/22/2020 - 11/02/2020	\$77.20	\$57.20	Invoice		Claim
Self Pay - Self Pay	FFS - FFS	11/04/2021 - 11/04/2021	\$75.00	\$75.00	Invoice		Delete
Self Pay - Self Pay	FFS - FFS	01/10/2018 - 01/10/2018	\$85.00	\$79.99	Invoice		Follow Up
Self Pay - Self Pay	FFS - FFS	05/04/2018 - 05/04/2018	\$50.00	\$20.00	Invoice		Mark As New
							Print (highlighted with a red box)

3. Select **Statement with Outstanding Balances** from the drop-down List.

If the Patient is past due on several statements, select the most recent one from the list to **Print**. The system creates one statement with all Past Due Charges.

Select Report

Check with your system administrator for additional access to report(s).

Account Details		Claim Number 00000004908			
Patient:	Ayers, (0103932)	Branch:	Ecumen Home Care Pathstone		
SOC Date: 04/28/2017					
Date	Description	Units/Rates	Charges	Credits	Balance
	Past Due				
10/01/20	Claim 00000002452 - Balance		\$47.00	\$0.00	\$47.00
11/01/20	Claim 00000002462 - Balance		\$47.00	\$0.00	\$47.00
Current Charges					
01/01/2020	PERS - PERSMSD (Visit) - Laura Mead	1.00 @ \$47.00	\$47.00		
	Claim 00000004908 Total		\$47.00	\$0.00	\$47.00
BALANCE DUE					\$141.00

Total	Current	30	60	90	120	150	180	>365
\$141.00	\$0.00	\$0.00	\$0.00	\$47.00	\$0.00	\$47.00	\$47.00	\$0.00