Home Health Care

PointClickCare®
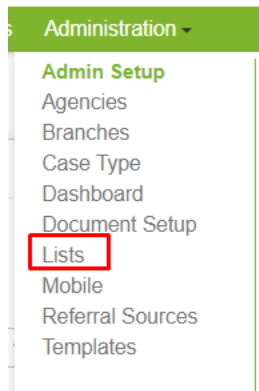
Reference Guide:
Claim Follow Up Action

Overview

The ability to add follow up notes on claims after they are submitted, helps to manage claims, and resolve remaining balances to improve collections.

Configuration

To add options to the follow up drop down list:

1. **Navigate** to the Administration tab.

2. **Select** Lists.

3. **Locate** Claim Follow Up Reasons, **select** Manage Items.

4. **Select** Edit to edit current pick list or Add to add to the pick list of items.

Manage <u>Claim Follow Up Reasons</u> [Return To Lists] [Add Item]

	▲ Label	⬍ Enabled
Edit	Billed Wrong Payer - Rebilled	✔
Edit	Claim Note	✔
Edit	Claim Resubmitted	✔
Edit	Collections - Final Attempt	✔
Edit	Collections - First attempt	✔
Edit	Collections - Patient on Payment Plan	✔
Edit	Collections - Turned over to Collection Agency	✔

Edit allows you to rename or disable an existing option:

Edit List Item ✖

Enabled	☑
Label*	Billed Wrong Payer - Rebilled

[Accept] [Cancel]

Add allows you to enter a new pick list option:

Add List Item ✖

Enabled	☑
Label*		

[Accept] [Cancel]

Tip: if you deselect the *Enabled* checkbox, the item will be disabled and no longer display as a pick list option.

Procedure

1. **Navigate** to Billing Queue.

2. Click **Add** to bring up the dialog box.

				Total Billed Amt: $209,684.98		Total Reimb Bal: $272,752.42	
⇕ Payer - Plan	⇕ Claim Type	⇕ Claim Dates	⇕ Billed Amt	⇕ Reimb Bal	⇕ Form Type	⇕ Follow Up	Actions
CGS - Medicare - PDGM	Final - PDGM1	03/18/2020 - 03/31/2020	$1,735.01	$1,887.87	Institutional	Add	Actions ⌄

3. **Select** the follow up reason for your note (required) from the drop-down list.

   Tip: The pick list of this drop-down can be customized in your administration settings described below.

4. **Add** follow up note (required).

5. **Select** if you need additional follow up and if so, populate date. This will show a date within the Billing Queue to indicate the date of next review of the claim.

   If you do NOT need any additional follow up on the claim, select no, an no future action will be necessary.

Follow Up ✖

Pers, Joe

Date of Birth	Payer - Plan	Member Id	Claim Dates	Billed Amount	Reimbursement
01/01/1934	MN Medicaid UMPI - MN Medicaid UMPI	232323	02/03/2020 - 03/14/2022	$337.00	**Balance** $337.00

Follow Up Reason *

Select a Reason ⌄

Note *

Additional Follow Up Needed? *   Follow Up Date *

Yes | No   MM/DD/YYYY

▾ Date Added	⇕ Added By	⇕ Reason	⇕ Note	⇕ Follow Up Date
11/23/2022	Felix, Elisha	Collections - First attempt	Called 11/23/22, rep states to call back.	11/24/2022
09/13/2022	Walton, Charlie	Claim Resubmitted	nv./knl;	03/09/2021

◀ 1 of 1 ▶   25 50 100 items per page   * Hold `Shift` to sort by multiple columns.

Displaying 1 to 2 of 2 items

Close | Save

6. **Click** Save to apply the note to the claim successfully.

⇕ Claim Dates	⇕ Billed Amt	⇕ Reimb Bal	⇕ Form Type	⇕ Follow Up
01/01/2017 - 01/31/2017	$406.00	$406.00	Invoice	11/02/2022
01/01/2017 - 01/31/2017	$44.00	$44.00	Invoice	Add
01/01/2017 - 01/31/2017	$2,218.06	-$3.00	Institutional Paper	📄
02/01/2017 - 01/31/2017	$170.62	$170.62	Institutional Paper	Add
02/01/2017 - 02/28/2017	$0.00	$0.00	Institutional	Add
02/01/2017 - 01/31/2017	$215.52	$215.52	Institutional Paper	11/16/2022
01/01/2017 - 01/31/2017	$322.38	-$0.90	Institutional Paper	📄

⇕ Follow Up	
11/02/2022	A date signifies a note is present on the claim with a follow up action needed on that date.
Add	
📄	A note icon signifies a note is present on the claim with no further action needed.
Add	
Add	The Add notation, signifies that no follow up notes are present on the claim.
11/16/2022	

Utilize the quick filter *Past Due Follow Up* to display any claims that need a follow up action based on the following criteria:

- Claim is in an outstanding status AND
    - Yes was selected for Additional follow-up needed on the most recent saved note AND
    - Today's date is equal to or after the follow-up date entered.

        OR

- Claim is in an outstanding status AND
    - There is no saved follow ups on the claim and its greater than 30 days from the submission date.

Dashboards

Paste Due Claim Follow Up	Follows the criteria of the quick filter to display total number of claims that have need a follow up note.

Reports

Claim follow up productivity report	Displays saved claim follow up notes.
Billed Claim Detail Aging Report	Displays Billed claims with an outstanding balance.

Notes: