

ENCOUNTER DASHBOARD

The Encounter Dashboard is accessible from the Patient Dashboard as a hyperlink or from the 'Go'-Cut 'e' + the Encounter number. Encounters may also be referred to as Charges or Claims.

The Encounter Dashboard is organized into sections. In the Menu bar, in green in our example, there are links to the patient dashboard - either the Patient ID or the Name.

1. Actions

- **[Modify Charge]** Edit the Encounter
- **[Change Claim Status]** Change the status of the Encounter- such as resubmit or hold
- **[Print Claim]** Print/Preview HCFA for this Encounter
- **[Charge Forms]** Mappable forms that are loaded and populate with Encounter data
- **[Reverse Charge]** Reverse for 'Modification' (Delete and Clone this encounter) or 'Deletion'
- **[Balance Transfer]** Move balance from one party on the Insurance Profile to another
- **[To Collections]** Transfer Encounter to collections
- **[Re-Apply Patient Credit]** Move credit from one Encounter to other Encounter(s)
- **[ANSI Preview]** View the ANSI output (Loops/Segments) for this Encounter
- **[Dunning/Statement Count]** View &/or update statement count (drives dunning message)
- **[Send to Worklist]** Add Encounter to a Custom Worklist

2. Charge

- Links to HCFA fields, Ansi Fields, Change Log
- Links allowing easy access to more information from the Library, and the ability to easily edit for users with edit privileges

- Encounter details, including hover over description of ICD, use name, reference batch (open or closed), Guarantor, statement type, Case, if the claim has been forced to paper
- Expand this section for Admit date, NDC, accident date, and other claim detail

3. Procedure

Procedures [1 - \$15.00]														
Line	Billable	DOS From	To	Facility	POS	CPT	Description	M1	M2	M3	M4	Dx	Unit	Charge
1	✓	09/29/2016	05/16/2019	1	11	36415	COLLECTION, VENOUS BLOOD, VENIPUNCTURE					1	1.00	15.00

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- Procedure count and total charge
- Displays line item details, including Modifier, DX link, Unit, per line charge
 - Partially submitted/excluded lines have color coding with hover

☒ Procedures [2 - \$315.7]		
Line	Billable	D
1	✓	05/10
2	✓	05/10
☒ Excluded from Claim		

4. Balance

☒ Balance Receipts ERAs (1) Post Payment Post Adjustment Post Refund 4

Insurance 0.00 Patient 0.00 Collection 0.00

Undo Posting

Line	DOS	CPT	Charge	ALWD	CO	OA	Ins Paid	Pat Paid	Ins Bal	Pat Bal
1	09/29/2016	36415	15.00	4.64	10.36	0.00	0.00	4.64	0.00	0.00

Posted Date	Receipt	Transaction	Insurance	Role	Transaction	Description	Amount	User	Batch/Period	Balance
10/13/2016	<input type="checkbox"/>	1211 765	BCBS [107]	1	ALWD	INSURANCE ALLOWED	4.64	SUPPORT	88 / 2014-02	15.00
10/13/2016	<input type="checkbox"/>	1211 765	BCBS [107]	1	CO45	INSURANCE PAYMENT ADJUSTMENT	10.36	SUPPORT	88 / 2014-02	4.64
10/13/2016	<input type="checkbox"/>	1211 765	BCBS [107]	1	PR1	PATIENT / DEDUCTIBLE	4.64	SUPPORT	88 / 2014-02	0.00
10/13/2016	<input type="checkbox"/>	1211 765	PATIENT	P	PBTI	PATIENT BALANCE TRANSFER IN	4.64	SUPPORT	88 / 2014-02	4.64
12/09/2016	<input type="checkbox"/>	10227 10564	PATIENT	P	PP	PATIENT PAYMENT	4.64	SUPPORT	331 / 2014-04	0.00

- Links to Receipts for this encounter, ERA (if any). To post payment, Adjustment or refund
- High level breakdown of Encounter balance by Insurance/Patient/Collection
- CPT line details: DOS (Date of Service), CPT Code, Charge, ALWD (Allowed), CO (Contractual Obligation), OA (Other Adjustment), Insurance & Patient paid
- Plus (+) sign expands view of CPT line to show all associated transaction lines
 - For a running balance use columns, Roll and Balance
 - Role - 1= Primary, 2= Secondary, 3 = Tertiary, P= Patient

5. Policy Breakdown

☒ Policy Breakdown Insurance Management Claim History Payment History 5

Insurance	Policy	Status	Responsibility Date	Days	Bill Date	Days	Eligibility / Verified DOS	Balance
BLUE CROSS / BLUE SHIELD [107]	SKR830244592	Payer Accepted	07/11/2018	58	08/21/2018	17	Check / 07/11/2018 07/11/2018 ✓	0.00
PATIENT		Hold Coordination Of Benefits						0.00

- Links:
 - Insurance Management - Change the insurance profile
 - Claim History – View Claim Status changes and other history *can be used to prove timely filing
 - Payment History- View payment details, View/print EOB for this Encounter
- Claims Status per responsible party, date party becomes responsible, date billed, days responsible and days since billed, check eligibility and Balance

6. **Validation**- Displays Claims management rule or Local Edits. If this encounter does not have any rules applied, it is listed as 'Passed'

7. **Notes** – Enter and display notes entered regarding this Encounter

8. **Demographics** – Patient demographics with links to edit & access demographic forms

9. **Dashboard Control** - Click 'Save Current View' to maintain the latest view

☒ Validations 6

✓ Passed

☒ Notes Add 7

There are no records available

☒ Demographics Edit [Ctrl-F2] Forms Contacts (0) Submission Names (0) 8

Patient Name	DOB	Phone(s)	Chart No
JOPLIN, JANIS E 4835 DARROW RD., STOW, OH 44224	05/27/1950 Age: 68 years Gender: M	H: (330) 928-8846 C: W: 330-6855	3931

Dashboard Controls Save Current View 9