

Introduction

Incomplete Charge Review is a review process for new charges. Users evaluate and 'Complete' individual or multiple Encounters, which updates the Incomplete Status to 'Ready for Submission'. A prominent feature of this screen is the ability to Merge Encounters, and mark as 'Complete' in one step. Drill-down capabilities provide easy access to the Encounter and Patient Dashboards as part of this process.

Where to Access

Incomplete Charge Review can be accessed in two areas:

1. From the Encounters by Status section, click the hyperlink to Incomplete Encounters

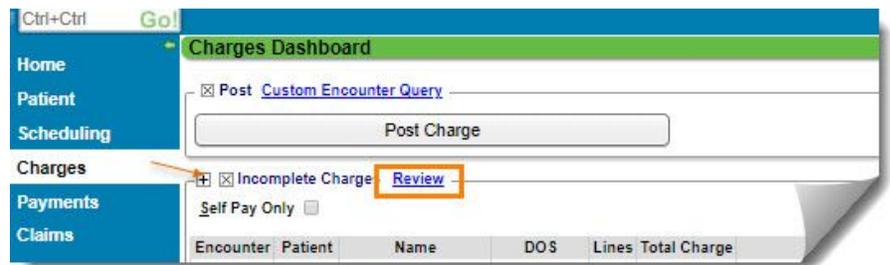
Home Dashboard

Encounters by Status [View All Clients](#)

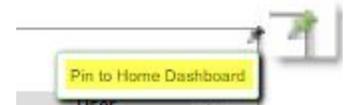
Insurance Facility Billing

Status	Description	Primary			
INC	INCOMPLETE	13		1	14
IPH	ON HOLD	8			8
IP03	READY FOR SUBMISSION	62	6	1	69

2. From the Charges Dashboard, in the Incomplete Charges section, click 'Review'



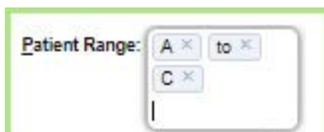
We recommend you 'pin' your preferred section, to your Home Dashboard



Filtering

Filters allow you to review a specific subset of visits, and include:

- DOS
- Admit/Discharge Dates
- Patient Name Range - In our example filtering for names from A-C
- Insurances
- Various Reporting Groups
- Duplicates
- and many more



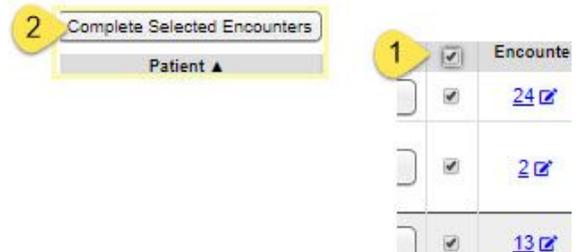
How to Complete Charges

To complete an individual charge for billing, check the box next to the Encounter and click [Complete]. A validation will prompt you to confirm, or a validation error will occur if there is a Charge Management Rule that needs to be resolved.

Patient ▲	Insurance	Rendering	Admit	Billing	Facility	POS	Discharge	Action	Encounter	DOS	CPT	Submit	Billable	Modifier	Diagnosis	Units	Fee	
Mickey 241017	MEDICARE	151	151	GW	11			Complete	24	10/29/2019	99213	99213	✓	J44.9	J45.909	1.00	80.00	
		24	24	RI2	22			Complete	2	10/18/2019	94060	94060	✓	G47.33	J30.9	1.00	175.00	
										2	10/18/2019	94726	94726	✓	G47.33	A01.03		5.00
										2	10/18/2019	L3870	L3870	✓	G47.33			0.00

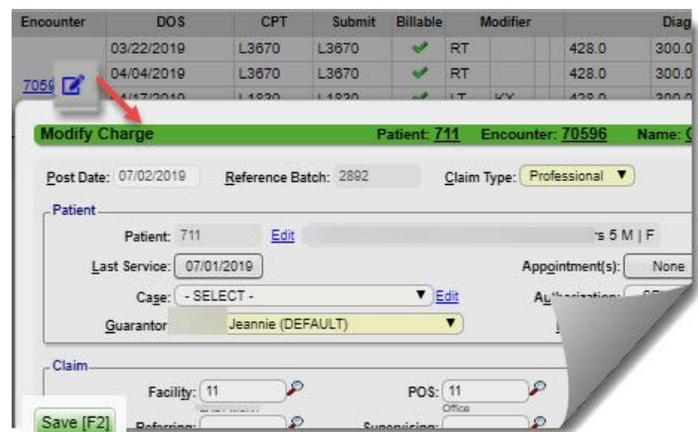
To complete multiple Encounters:

1. Select individual Encounters or use the Select-All checkbox at the top
2. Click [Complete Selected Encounters]



Other Features

- Hover-over descriptions for Claim and Line level information such as Insurances, Rendering Provider, Billing Provider, Facility, CPT, Diagnoses, etc.
- To Modify an Encounter click the pen icon. This opens a 'Modify Charge' popup > make needed changes > [Save]
- To open a new tab for the 'Encounter Dashboard', click the Encounter ID
- You may Modify, Delete, Split or Add to Worklist from the Encounter Dashboard



- Similarly, to open a new tab for the 'Patient Dashboard' click the Patient ID

How do Charge Management rules appear?

In our example we attempted to complete 5 Encounters. The popup 'Validation Warning' lets us know only 4 Encounters will save as completed upon clicking [Save & Continue]. The issue identified by the Charge Management Rule will need to be resolved to complete the remaining encounter.

