

Imagine Training: Troubleshooting Missing Charges

Since most of our practices interface charges from one PM or EMR system into Imagine, we strongly encourage our Limited Models to always verify all batched charges/patients seen are posted in Imagine. And during the verification process you may find charges are missing. The tips below will help you troubleshoot your missing charges before contacting our team at softwaresupport@phydata.com for assistance.

Practices on our ADI eClinicalWorks Database:

First we recommend you check eClinicalWorks for any issues preventing the charges from transmitting to Imagine:

1. Verify the note is locked.

- a. Since charges do not transmit to Imagine until the Progress Note has been locked, it's important to confirm this first in eCW. Locked notes will have the provider's signature and locked message at the bottom.

Electronically signed by Nikki (TrainingALL) Trusty on 09/28/2018 at 11:13 AM CDT
Sign off status: Completed

2. Verify the date and time of the lock.

- a. Imagine downloads charges every two hours, so if the note was locked within the last two hours, it may not have been downloaded yet.

3. Verify if procedure codes were included.

- a. eClinicalWorks does not send a charge message to Imagine for any notes locked without a procedure code. Since there is nothing to bill, there's no charge message to send. View your SuperBill image to verify what codes were included in the note. To access the Superbill, click the drop down next to Details at the bottom of the note, and choose SuperBill from the list that appears.

Super Bill

List of available super bills

| Super Bill | | | | |
|--------------------------------|--------------------------|---------------------------------|------------------------------------|-----------------------|
| Pt Name | Test, Nikki | The Health Group of McMinnville | Provider | Bryan D. Chastain, MD |
| DOB | 11/16/1951 | 155 Health Way, Suite 1 | PCP | Burbank, Sally |
| Insurance | Palmetto Medicare Part B | McMinnville, TN-37110 | Appt Date | 09/28/2018 |
| Copayment | 0.00 | | Appt Time | 08:00:00 |
| E & M and Procedure | | Diagnosis | | |
| DOT Physical | DOTPH | 1.00 | Encounter for physical examination | Z00.00 |

4. Verify the number of locks.

- a. If a provider forgets to lock a note with a procedure code, they can unlock and add the code, but eClinicalWorks will not resend a message or send duplicate messages. In these cases the charges will need to be manually entered into Imagine. To see the Locked Log, click the drop down next to Addendum at the bottom of the note and choose View Locked Notes Log.

If no issue is found in eClinicalWorks, proceed to the items on Page 2 for Imagine.

Practices who batch claims to Imagine:

First we recommend you check your system and desktop for any issues preventing charges from transmitting to Imagine:

1. Claim Creation

- a. In your Practice Management or EMR system, first verify a claim exists for that patient and DOS.

2. Claim Submission

- a. Next verify your claim status shows “Submitted” and that the claims batch file is getting saved to the correct folder/clearinghouse.

3. Batch Processing

- a. For practices who save their claims batches into an “Imagine Billing Files” folder, open that folder to verify your batches aren’t “stuck”. If files aren’t disappearing immediately or at least the same day, please contact our team at softwaresupport@phydata.com.

If no issue is found in your PM system or EMR, proceed to the items below for Imagine.

All Practices – Checking for Missing Charges in Imagine:

After verifying your missing charges made it out of your EMR or PM system, follow these steps to verify if the missing charges are in a window of Imagine:

1. Check Imagine Download.

- a. Existing practices sometimes forget to check this area since after Go Live you see fewer and fewer charges getting flagged for mapping.

2. Check Charge Central.

- a. Ensure your view is on “All” batches with no filters and sort by patient name to verify the patient isn’t listed in this view.

3. Check Non Post.

- a. Non Post will flag anything with errors that Imagine cannot post. This includes visits where the charges were deleted from Charge Central as well as visits where the location was changed in Charge Central.

4. Check Account Inquiry.

- a. Check this area to verify the charges weren’t already posted by another user. Also verify your view isn’t filtered to only specific types of charges.

5. Check Orphan Charges.

- a. Check this area to verify the charges weren’t flagged for a location issue (see separate handout).

6. Check Open Batches.

- a. For manually posted charges it can be easy to close the Manual Posting window before posting your batch. If you’re missing a charge that was manually posted, check this window to verify it’s waiting to be posted. To see open charge batches go to Charges>>Manual Charge Posting and click the ellipsis (...) next to the Batch Number field.

7. Contact Software Support.

- a. If your missing charges still cannot be found after these steps, contact our team at softwaresupport@phydata.com to troubleshoot for you.