

FAQ - Frequently Asked Questions

Please review the following Q&A as these are the most common questions that will probably affect your claims processing.

Content:

1. **Review.** How can I see the visits that I just entered?
2. **Missing Info.** How will I be notified if information is missing from my visit(s)?

1. Review New Visits.

QUESTION: I just entered a list of visits – How can I make sure that they are all entered correctly?

ANSWER:

Go to the ‘Patient Visits’ tab and change the ‘Status’ filter to ‘Open’.

The screenshot shows the Office Ally software interface. At the top, there is a navigation bar with tabs: Desktop, Appointments, Patient Visits (selected), Claims/Billing, Accounting, Manage Patients, Patient Portal, and Manage Office. Below the navigation bar, there are buttons for 'Add New Visit', 'Patient Visit List', 'Patient Look Up', and 'Reports'. The main content area is titled 'Patient Visit List'. It contains several filters: 'Visit Date' (By Date), 'Search For' (Patient Last Name, Starts With), 'Display Filter' (Office: -- All --, Provider: -- All --), and 'Status' (Open, highlighted in yellow). Other filters include 'Visit Type', 'Balance', and 'Balance Responsibility'. A 'Select Actions' button is located at the bottom right of the filter area.

Open visits have been created, but not reviewed or billed out as claims to any payer.

- Professional Practice reviews visits and sends out claims for visits that have all the necessary information at least every 10 days.
- Visits that have been billed out to the payer will show a status of “Claim Created...”, “Patient Responsibility”, or “Closed”.



2. Missing Information.

QUESTION: What if I enter a charge and information is missing? How will Professional Practice let me know that information is needed?

ANSWER:

Tasks. If we can't bill out a claim for any reason, we will leave the visit in "Open" status and we will create a task assigned to you (or your staff member responsible for claims and coding).

Subject:	Missing Info - DOS 2/5/24		
Description:	Patient's insurance has terminated. Need new insurance information for patient.		
Patient ID:	135721815	...	Doe, John
Status:	New	▼	Priority: Medium
Requester:	Tracy Gonzalez	Due Date:	2 / 19 / 2024

- If you receive a task showing missing information, add the missing information to the patients' account, visit, or other area; and change the task status from "New" to the applicable status (ie: *Complete*, *Needs More Info*, or *In Progress*).
 - **Complete:** Missing information has been added and visit is ready to be billed out as a claim.
 - **Needs More Info:** Provider needs information from Professional Practice in order to address the task / missing information request.
 - **In Progress:** Provider acknowledges the task/request and is working on it.
 - (See Desktop > Task List - for details about task status options).

If you run into snags along the way, please email me a screenshot with a description of what you were trying to do and what happened.

You can call **Office Ally Customer Support at (360)975-7000** . They can log into your account remotely to see what you're seeing in real time and address any issue causing you trouble.

