



RESOURCE AND PATIENT MANAGEMENT SYSTEM

Basic Third Party Billing and Accounts Receivable

Announcement and Agenda

FY 2016

Office of Information Technology (OIT)
Albuquerque, New Mexico

1.0 General Information

1.1 Purpose of Training

This class focuses on the RPMS Third Party Billing and Accounts Receivable software applications. Training will include: adding and editing insurance in Patient Registration, generating and editing claims, printing paper claims, exporting electronic claims, understanding 837 files, batching payments, posting payments and adjustments, processing 835 files, reversing transactions, generating reports, and basic UFMS exporting/reconciliation.

Ideally, participants who attend this course should have a basic understanding of the medical billing process and should be somewhat familiar with RPMS.

1.2 Prerequisites

None

1.3 Intended Audience

This class will benefit business office staff responsible for billing claims, posting payments, and/or following up on accounts receivable. Patient registration/admitting staff who are interested in the billing and receiving process may also benefit, as well as business office managers and/or managers who are responsible for third party revenue.

1.4 Course Materials and References

1.4.1 At the IHS Training FTP Site

The following materials may be downloaded from the RPMS Training FTP site at <ftp://ftp.ihs.gov/pubs/rpms-training/ThirdPartyBillingAndAccountsReceivable/>

- Course Agenda (this document)
- IHS Overview and RPMS Revenue Cycle
- How to Find RPMS User Manuals and Addendums
- RPMS User Tip Chart
- Editing a Patient's Medicare Name
- Third Party Billing Claim Generator
- Add/Edit Claim Menu

- Claim Bill Management Menu
- Printing Claims and Creating Electronic Claim Files
- Understanding 837 Files
- Third Party Billing Reports
- A/R Overview
- Collection Batches
- Allowance Categories Mapped to 3P Insurer Types
- Secondary Billing
- Processing ERA Files
- ERA Quick Reference Guide
- Flat Rate Posting
- Payment Credits
- Patient Statements
- Debt Letters
- Key Business Office Reports
- Exporting Reports from RPMS

1.4.2 At the IHS RPMS Website

RPMS Third Party Billing and Accounts Receivable User Manuals

http://www.ihs.gov/RPMS/index.cfm?module=Applications&option=View&AC_ID=1

- Various eLearning sessions on specific topics are offered on the IHS RPMS Training Website. Topics include:
- 837 Files: Understanding the Structure and Working Rejections
- 837 Segment Overrides and Form Locator Overrides
- Fee Schedules: Loading and Maintaining
- Insurer Set Up and Maintenance
- Secondary Billing
- Setting up an RPMS Clearinghouse for 837 Files
- Software Updates for Third Party Billing and for Accounts Receivable
- Creating and Editing Collection Batches
- Posting Payments and Adjustments, Flat Rate Posting
- Processing ERA Files
- Patient Prepayments

- Patient Statements
- Debt Letters
- Aging Reports
- Key Business Office Reports
- UFMS Cashiering and Reports

<https://www.ihs.gov/RPMS/index.cfm?module=Training>

2.0 Learning Objectives

At the completion of this training the participant will be able to:

- Understand the RPMS Revenue Cycle
- Find RPMS user manuals and addendums
- Understand what cashiering is and what it's used for
- Add and edit third party liability (insurance) in Patient Registration
- Generate claims in Third Party Billing
- Add and edit claims in Third Party Billing
- Correct claim errors in the Claim Editor
- Print paper claims and export electronic claims
- Understand 837 file structure
- Create and edit collection batches in Accounts Receivable
- Understand the difference between allowance categories and insurer types
- Post payments and adjustments
- Bill secondary claims after posting in Accounts Receivable
- Post refunds, transfers, status change transactions, and reverse transactions
- Use the flat rate posting option
- Understand how to process ERA/835 files
- Flag and print patient statements in Accounts Receivable
- Set up and generate debt letters in Accounts Receivable
- Generate and understand Third Party Billing and Accounts Receivable reports
- Export reports from RPMS

3.0 Detailed Agenda

3.1 Day One

Topic	Duration
Welcome: <ul style="list-style-type: none"> • Introductions • Review agenda and training materials • Where to find user manuals and addendums • IHS Overview and RPMS Revenue Cycle 	30 min
Patient Registration <ul style="list-style-type: none"> • Adding and editing insurance information • Medicare Secondary Payer • Sequencing insurers 	60 min
Break	15 min
Third Party Billing <ul style="list-style-type: none"> • Review of user manual • Review of RPMS menu options 	60 min
Third Party Billing Cashiering <ul style="list-style-type: none"> • What is cashiering for? Who uses it? • Opening a new cashiering session 	30 min
Lunch	60 min
Third Party Billing Claim Generator <ul style="list-style-type: none"> • What is the claim generator? • How does it work? 	30 min
Add/Edit Claim Menu (Third Party Billing) <ul style="list-style-type: none"> • Claim Generator, One Patient • Edit Claim Data (claim editor) • Claim Editor Loop • Add New Claim (Manual Entry) • Rebuild Items from PCC • Check Eligibility for a Visit 	60 min
Break	15 min
Add/Edit Claim Menu, continued	60 min
Questions/Review	15 min

3.2 Day Two

Topic	Duration
Review of day one	30 min

Topic	Duration
Claim/Bill Management Menu (Third Party Billing) <ul style="list-style-type: none"> • Cancel Claim • Cancel an Approved Bill • Inquire about an Approved Bill • Merge Claims • Initiate Back Billing Check • Add a new BILL that was Manually Submitted • Export Inpatient Bill to Excel • Open/Close Claim • Recreate claim from PCC data • Split Claim 	60 min
Break	15 min
Claim/Bill Management Menu, continued	30 min
Lunch	60 min
Print Bills Menu <ul style="list-style-type: none"> • Bills Awaiting Export Report • Print Approved Bills • Reprint Bill • Enter Resubmission Number • Print Patient Statement • Transmittal Listing • Test Forms Alignment 	60 min
Electronic Media Claims (837 files) <ul style="list-style-type: none"> • Summary of Bills Ready for Submission • Create EMC File • Batch Summary • Re-Create an EMC File • Re-Export Bills 	60 min
Break	15 min
Understanding 837 Files	30 min
Closing/Reconciling TPB cashiering sessions <ul style="list-style-type: none"> • Exporting to UFMS • Grand totals report • Basic HUB reconciliation 	30 min
Third Party Billing Reports	30 min
Third Party Billing Scavenger Hunt	30 min
Questions/Review	15 min

3.3 Day Three

Topic	Duration
Review of Days One and Two <ul style="list-style-type: none"> • Is this all making sense? 	30 min
Accounts Receivable <ul style="list-style-type: none"> • Review of user manual • Review of RPMS menu options 	30 min
Accounts Receivable Cashiering <ul style="list-style-type: none"> • Opening a new cashiering session 	15 min
Collection Batches <ul style="list-style-type: none"> • Allowance categories vs. insurer types • Creating, editing and finalizing batches 	30 min
Break	15 min
Posting <ul style="list-style-type: none"> • Payments and adjustments • Reversing payments (for Tribes and Urban programs) • Payment credits • Flat Rate Posting • ERA posting • Refunds and transfers 	60 min
Lunch	60 min
Posting, continued	60 min
Closing/Reconciling AR cashiering sessions <ul style="list-style-type: none"> • Exporting to UFMS • Grand totals report • Basic HUB Reconciliation 	15 min
Patient Statements <ul style="list-style-type: none"> • Tasking, flagging, printing 	15 min
Debt Letters <ul style="list-style-type: none"> • Set up, queuing, printing 	15 min
Break	15 min
Key Business Office Reports <ul style="list-style-type: none"> • Aging, Financial, etc. 	30 min
Exporting Reports from RPMS	15 min
Accounts Receivable Scavenger Hunt	30 min
Questions / Review Evaluations Adjourn	15 min