WebPT

The administrative and billing workflows detailed below are for illustrative purposes only. These functions may need to be adapted to fit your clinic processes. Please note that some of the links below will require you to log into WebPT to access them.

WebPT + Therabill Workflow Guide: Administrative

DAILY: Eligibility & Benefits

- ☐ For each new patient or initial exam scheduled for the next two business days, obtain a copy of eligibility and benefits from the insurance company and these answers:
  - Is prior authorization required?
  - Is a referral required?
  - Does the patient have a copay, deductible or coinsurance that applies to PT/OT/SLP?
  - What are the policy dates?
  - Is there an annual visit limit for PT/OT/SLP? Have they used any?
- ☐ Enter the above details into the insurance section of the patient's chart.
- ☐ Upload a copy of the eligibility & benefits to eDocs.
- ☐ Enter the patient's Insurance Authorization in the proper case.

DAILY: Checking Expiring Authorizations & Prescriptions

- ☐ Check your At A Glance alerts for ending or expiring prescriptions and authorizations.
- ☐ If a patient's authorization or prescription is approaching expiration, make a note on the patient's next scheduled appointment as a reminder to the provider or front desk.
- ☐ Prepare any necessary prior authorization forms required by the insurance company.
- ☐ Submit (fax, email, or call) all pending prior authorization or prescription requests that are ready for submission.
- ☐ When a new Authorization or Prescription is obtained, add to the chart.
  - Make sure authorization dates do not overlap. If the previous auth spanned 3/1/18-3/31/18 and the new auth begins 3/20, edit the previous auth to end 3/19.

DAILY: Check & File Communications

- ☐ Check faxes, email, and mail and upload any patient records into eDocs.
  - Name, categorize and date the files so they are easily identifiable.
- ☐ Message any staff that needs to be alerted to the newly added documents.

DAILY: Prepare for Medicare Progress Notes

- ☐ View your dashboard/agenda for the next business day.
  - Open the chart of each Medicare patient to check for a Progress Note Alert. This will appear above the patient records in red text.
- ☐ Navigate to the schedule for tomorrow.

- Make a note on the appointment to indicate which OMT the patient will need to fill out.

- ☐ Have the patient fill out the OMT before the visit. Scan the hard copy into eDocs.

DAILY: Patient Intake

- ☐ Add New Patients
  - Quick Add should be used for self-pay patients only. Quick Add does not enable you to collect important insurance details needed to verify insurance for insured patients.
  - Do not skip the collection of important data like insurance plan and ID number.
- ☐ For Returning Patients:
  - Verify their phone, address, and email on file.
  - Has their insurance changed? If yes, add a new insurance. Do not remove or overwrite the old one.
  - Create a new case, making sure to select the proper insurance(s).
- ☐ On the day of their initial exam:
  - Copy the patient's insurance cards—front and back, both primary AND secondary insurance—and upload to eDocs.
  - Collect payment. If the member is unable to pay today, still add the charge and leave it unpaid.
  - If the patient is doing an Outcome Measurement Tool, have them complete it and upload to eDocs.
  - If you have your own internal paperwork the patient has filled out:
    - Edit their Patient Info with any supplemental info like emergency contacts.
    - Upload the paperwork to eDocs.

MONTHLY: Check WebPT Reports

- ☐ **Lost Patient Log**
  Call patients who haven't completed their POC to encourage them to schedule more follow-ups, or remind the PT to discharge the case.
- ☐ **Medicare POC Report**
  Re-fax or call physicians' offices as needed to ensure plans of care are returned.

WebPT + Therabill Workflow Guide: Billing

DAILY: Reconcile Yesterday

- ☐ Check WebPT's Missed Notes Report. Were all patient visits documented and finalized?
- ☐ Compare WebPT's Billing Report to Therabill's Session Balance Breakdown report. Did all finalized visits flow over? If not, check the Claims Feed Report.
- ☐ Compare WebPT's Payment Log(change "Date of Service" to "Date of Transaction") to Therabill's Payment Method Breakdown report(change view to Patient/Client Payments). Did all patient payments flow over?
- ☐ Follow up on any discrepancies and make corrections.

DAILY: Review Yesterday's New Patient Details

- ☐ Check the patient's eDocs to ensure you have copies of the patient's insurance card(s).
- ☐ Verify that eligibility and benefits have been checked and a copy is on file (in eDocs or notated in Chart Notes)
- ☐ Make sure insurance details such as ID #, policy visits, policy dates, and copay are entered in the WebPT chart (See Step 6).
- ☐ Make sure proper insurance(s) is/are assigned to the proper case (See Step 7).
- ☐ If required by the insurer, verify prior authorization is obtained and entered into the chart.

DAILY: Address Therabill Dashboard Alerts

- ☐ Addendum Added Alert
- ☐ Payment Updates in WebPT Detected
- ☐ HL7 Transmission Errors (4th paragraph)
- ☐ Electronic Claim Errors can be clicked on for more information on the error and possible solutions.

DAILY: Bill Your Claims and Post Payments

- ☐ Click the Insurance Invoicing alert on your Therabill dashboard (or go to Billing ➜ Bill Insurance ➜ Select Client). Review the contents of the claim for accuracy. Submit all claims in the insurance invoicing queue.
    - Noticing missing modifiers or other oddities during billing? Check the insurance's settings and plan type in WebPT.
- ☐ Click the ERA alert on your Therabill dashboard (or go to Filing ➜ EOBs/ERA) and post any available ERAs.
- ☐ Post any paper/printed EOBs.
- ☐ Do you have secondary or tertiary insurances to bill now? Return to Billing ➜ Bill Insurance to bill these.

DAILY: Check and Reconcile Reports

- ☐ Check Insurance Payment totals: Therabill Reports ➔ Snapshot Reports ➔ Payments ➔ Payment Method Breakdown ➔ Payment Type: Insurance.
- ☐ Check Insurance Payment details (line by line): Therabill Reports ➔ Snapshot Reports ➔ Payments ➔ EOB ➔ Group By: Insurance.
- ☐ Daily payment and adjustment totals with AR: Therabill Reports ➔ Snapshot Reports ➔ Balances/AR ➔ Daily AR.

MONTHLY: Patient Billing

- ☐ Open the **Statement Balance Report** in Therabill: Therabill Reports ➔ Snapshot Reports ➔ Balances/AR ➔ Statement Balance
- ☐ Go to Billing ➔ Bill Client ➔ Balance Statement. Type the name of each patient who owes a balance to review their statement for accuracy.
    - Do you need to apply some unassigned patient payments? Go to Payments ➔ Enter Payment ➔ Batch Client.
    - If you need to correct any session balances, click the **$** icon beside the date of service.
- ☐ Print one statement at a time or click Batch to print multiple statements.
    - Access generated statements in Filing ➔ Client Filing to reference if a patient calls or to re-print.

MONTHLY: Month-End Reports

- ☐ WebPT: the Productivity Report displays productivity by documentation type.
- ☐ WebPT: the Referral Report allows you to see which physicians are referring the most patients.
- ☐ Therabill: **Key Indicators** allows you to compare the ebb and flow of payments, units, new patients, charges, and visits month-to-month.
- ☐ Therabill: the **Monthly A/R** report allows you to compare your charges, posted payments and patient payments month to month.
- ☐ Therabill: the **Provider Weekly Totals** report allows you to change totals drop-down box to units and charges to number and percentage of each per provider.
- ☐ Therabill: **Balance Aging Report**. Aging by Insurance: follow up on claims 60+ days old. Aging by Client: check "only finalized charges" box.