



User Group Meeting 2021

Let's Have Some Fun!

Finalize Definitions

Codes

Event Type	Event Type on Report/Grid	Definition	
CLAIM_READY	CLM_RDY	Event added when charge marked as claim ready	C
NEW	NEW	Event added when new charge or transaction is added	F
REBILL	REB	Event added when charge is rebilled	F
REVERSE	REV	Event added when charge or transactions is reversed	F
UC_NEW	U_N	Event added when unapplied credit is added	F
UC_REVERSE	U_REV	Event added when unapplied credit is reversed	F
UC_TRANSFER	U_TRA	Event added when unapplied credit transferred to a charge	F
UPDATE	UPD	Event added when charge or transactions is updated	F

F – in Finalize grid / Report
C – Claim Event – in Ready to Bill



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What does NOT require a Finalize?

Changing a Diagnosis
Changing a Modifier
Changing a Referring Provider
Marking a claim ready from EDI
Changing the Estimated Patient or Estimated Insurance Balance

Ok to **REBILL** if no other finalize item has been changed.

What does require a Finalize?

NEW charge / transaction
New Unapplied
Unapplied money transferred to previously finalized charges
Change - Provider, location, fee, procedure, DOS, Insurance
Reversal of Charge or Transaction

Charges will need to be **FINALIZED** before rebilling if any of the events in this table have taken place.

Note: if a charge or transaction is entered but not finalized, and reversed, it will not appear in grid for batches. It will be an event on the line-item history.



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Color on Grid

<p>TEAL - this is displayed on previously finalized records which have changes, or new data.</p> <p>There will always be 2 rows colored, never 1</p>
<p>TEAL - Ready to bill - all are this color</p>
<p>TAN - this means on the grid the items are selected.</p> <p>Seen when selecting the batch on the grid itself.</p>
<p>YELLOW - signifies paper claim</p>