Un-Billing Charges

FAQ

Prepared for

myUnity Essentials Financial

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Netsmart

Un-Billing Charges

Go to **A/R > Payments/Transfers** (or click **Payments** button).

From the **Summary** tab, use the filters at the top of the window to select the **Insurance** and/or **Patient** with the Bill Date(s) under which the charges were billed (the Bill Date assigned when the Billing Audit was posted).

The Insurance and Patient dropdowns show you the most recently selected insurances/patients. Double click in each field to search for and select a different insurance or patient if needed or type the code in if known.

Charge From/To or Period Date ranges will display at the top of the window to assist with selecting the proper bill record.

Select the bill record by clicking on that row and go to the **Detail** tab.

Select the Charge to be unbilled and press the **Un-Bill** button at the bottom of the window, or if all charges need to be unbilled, check the **Un-Bill All Chgs** box and then press **Un-Bill**.

If un-billing a charge for a PPS payer, the Final PPS AFP Claim charge must also be un-billed. A new Final Billing Audit will need to be run and posted after the charge has been corrected.
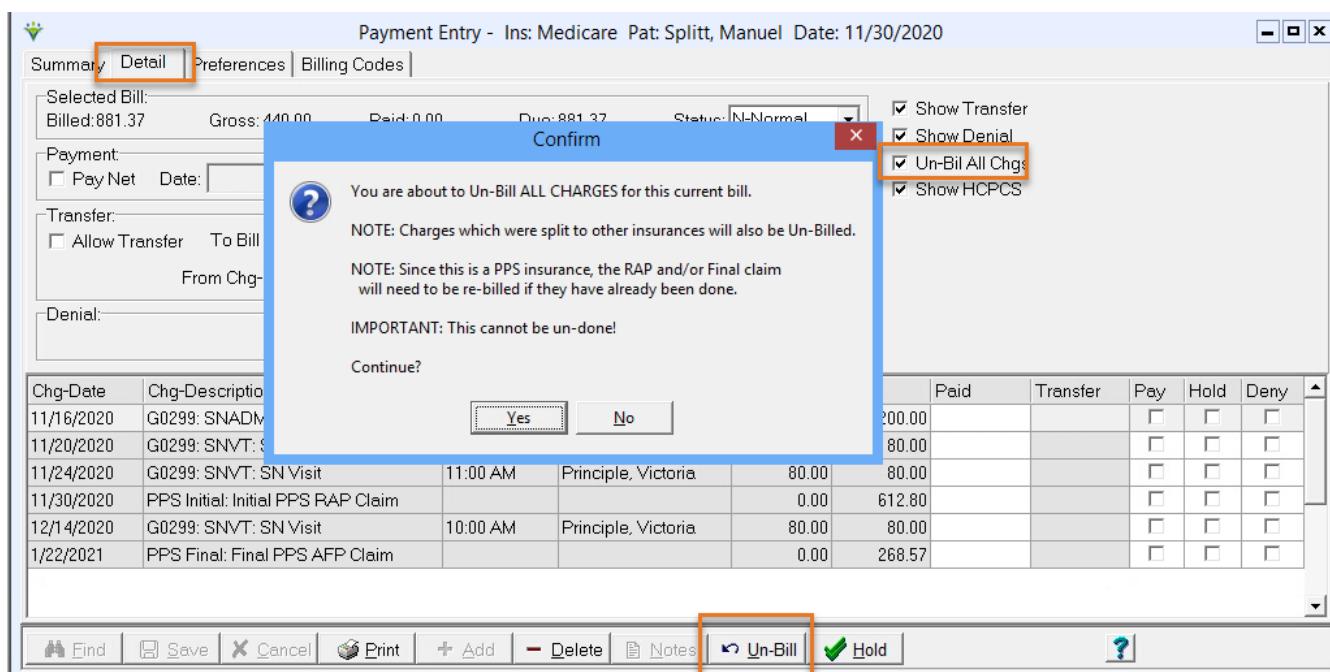
If all charges have been unbilled and no payments are attached, on the **Summary** tab press the **Delete** button at the bottom of the window to inactivate the A/R record. Once inactivated the record will no longer be accessible via Payment Entry but can be viewed on the A/R report when run to include Zero Balance A/R for Inactive Bill Status Selection type.

Once charges have been un-billed, repost the corrected visit information from the **Clinical Chart**. If needed, the charge can be deleted from **Charge > Enter/Maintain**.

If the charge was billed to the wrong payer, correct the patient's insurance information and/or Insurance Rates.

If the wrong charge amount was billed, confirm the correct rates have been entered in **File > File Maintenance > Entity > Insurance Type** on the **Ins-Rate** tab.

Run a new Billing Pre-Audit and Audit when done and confirm the charges have the expected rates and visit time prior to posting.