View Billing Tasks in NextStep Clinical

Last Modified on 03/09/2022 4:19 pm EST

> **Path: Main Menu > Admin Tools Menu > Billing Tasks**

About

The Billing Tasks window in NextStep Clinical is a checklist of billing-related tasks that identify a mismatch between the data in the Billing Engine vs. what is in Clinical. Ultimately, this report is used to ensure alignment between the data in both areas. There are two tabs that make up the Billing Tasks window, Unresolved and Resolved. The Unresolved tab lists the tasks that require action (via voids/corrections/resubmissions in the Billing Engine). Once the necessary action is taken on an unresolved task and the task is resolved, it is moved to the Resolved tab.

> 🔑 **User Permission**: In order for a user to have access to this report, they must have the permission **Billing Tasks** enabled.

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View Unresolved Billing Tasks

1. Navigate to Billing Tasks by following the path above.
2. In the Unresolved tab, review any items that are listed and determine what needs to be corrected in the Billing Engine. Utilize the **Case #** to search for the client in the Billing Engine.

	Svc ID	Reason	Case #	User	Svc Date of Service	Date of Service	Activity Code
Mark Resolved	336950	Cannot delete service because it has been processed in the billing engine, possible DOS mismatch	1035077	Knowledge Team SME	1/17/2022	1/16/2022	

In the example above, there is a possible DOS match which we can see from the Reason listed as well as the Svc Date of Service and Date of Service columns. The DOS needs to be updated in the Billing Engine to match the change made in the Clinical site.

3. Click **Mark Resolved** once you've addressed the task.
4. A pop-up is displayed, "Mark this billing task as resolved? This should only be done when the line item has been fixed in the billing engine." Click the **Yes** button to proceed.
5. The task is moved to the Resolved tab.

View Resolved Billing Tasks

To view a history of resolved billing tasks and the person who resolved the task, along with the date/time it was resolved:

1. Navigate to Billing Tasks: **Admin Tools > Billing Tasks.**
2. Click the Resolved tab to see a list of resolved billing tasks.

BILLING TASKS

Unresolved | Resolved

Resolved Tasks (past 30 days)

Svc ID	Reason	Case #	User	Svc Date of Service	Date of Service	Activity Code	Resolved On	Resolved By
336950	Cannot delete service because it has been processed in the billing engine, possible DOS mismatch	1035077	Knowledge Team SME	1/17/2022	1/16/2022		01/17/2022 02:44 PM	NextStep Solutions