View the Services' Form Billing Log

Path: Navigation Form > Services button

About

The Billing Log function on the Services Form is a diagnostic tool that displays the status of each background action performed during the Recalc process, including the specific step where a service fails the internal scrub. The Billing Log can be a helpful tool to resolve a Bill Status you aren't sure how to fix.

Turn on the Billing Log

1. Navigate to the Service Filters Form by following the path above.
2. Use the **Bill Status** drop-down to select NOT BILLED ONLY.

> **Note:** You can filter further by utilizing the fields in this form, such as by service date range, client, etc.

3. Click **OK**. Services are displayed based on the filters that were set.
4. Click the Billing Log (0) button to open the Billing Properties pop-up.
5. Click the **Logging Is Off** button to turn on logging.
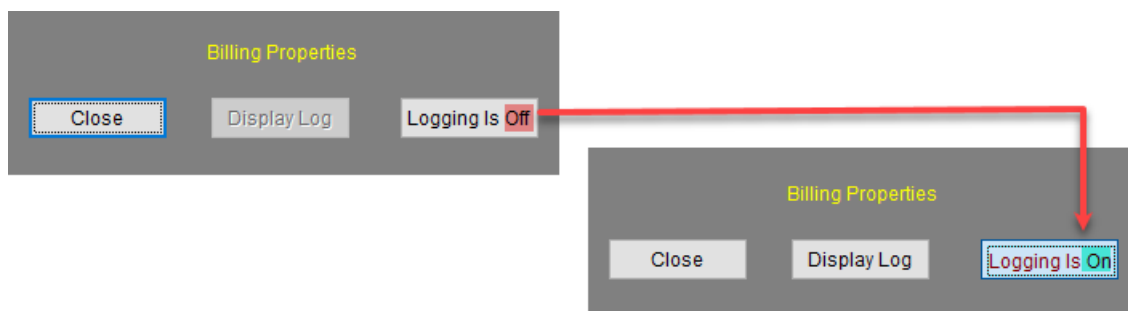
> **Warning:** Logging is automatically turned back to off when the Services Form is closed.

6. Click **Close** to exit the Billing Properties pop-up.
7. On the Services Form, click Recalc List or Recalc Selected.
   - Reference: Convert Services into Line Items - Recalc
   - The number on the Billing Log button should start counting up as the services are recalcing.
8. When the Recalc process is finished, open the log by clicking the **Billing Log** button again, and then click **Display Log.**
9. The Billing Log window opens, displaying a row for each validation check.

Reading the Billing Log

A blank row separates each service. The number of rows per service depends on the number of validations processed before reaching a failure. The failure point is indicated by a blank in the OK column.

PMT Billing Log - ()

Case No.	Insurance		Billing	Ok	Status
▶ 6775	59 - M-59 Covera	S	90847 - 02/03/2025 11:00:00 A	Ok	Activity Code Insurance field 'Skip If Primary' is not checked or insura
6775	59 - M-59 Covera	S	90847 - 02/03/2025 11:00:00 A	Ok	Activity Code Insurance field 'Stop If Primary' is not checked or insura
6775	59 - M-59 Covera	S	90847 - 02/03/2025 11:00:00 A	Ok	Insurance not previously billed for this service
6775	59 - M-59 Covera	S	90847 - 02/03/2025 11:00:00 A	Ok	Benefits Not Exhausted
6775	59 - M-59 Covera	S	90847 - 02/03/2025 11:00:00 A	Ok	Successfully retrieved bill rate code and procedure code
6775	59 - M-59 Covera	S	90847 - 02/03/2025 11:00:00 A		Subscriber number Missing
6775	99 - Private Pay	S	90847 - 02/03/2025 11:00:00 A	Ok	Activity Code Insurance field 'Skip If Primary' is not checked or insura
6775	99 - Private Pay	S	90847 - 02/03/2025 11:00:00 A	Ok	Activity Code Insurance field 'Stop If Primary' is not checked or insura
6754	99 - Private Pay	S	90837 - 02/03/2025 03:00:00 F		No insurance records
6775	59 - M-59 Covera	S	S90853C - 02/04/2025 11:00:0	Ok	Activity Code Insurance field 'Skip If Primary' is not checked or insura
6775	59 - M-59 Covera	S	S90853C - 02/04/2025 11:00:0	Ok	Activity Code Insurance field 'Stop If Primary' is not checked or insura
6775	59 - M-59 Covera	S	S90853C - 02/04/2025 11:00:0	Ok	Bill insurance even if previously billed for this service
6775	59 - M-59 Covera	S	S90853C - 02/04/2025 11:00:0	Ok	Benefits Not Exhausted
6775	59 - M-59 Covera	S	S90853C - 02/04/2025 11:00:0	Ok	Successfully retrieved bill rate code and procedure code
6775	59 - M-59 Covera	S	S90853C - 02/04/2025 11:00:0		Subscriber number Missing
6775	99 - Private Pay	S	S90853C - 02/04/2025 11:00:0	Ok	Activity Code Insurance field 'Skip If Primary' is not checked or insura
6775	99 - Private Pay	S	S90853C - 02/04/2025 11:00:0	Ok	Activity Code Insurance field 'Stop If Primary' is not checked or insura
956	MCARE - Medica	S	90791 - 02/07/2025 09:00:00 A	Ok	Activity Code Insurance field 'Skip If Primary' is not checked or insura
956	MCARE - Medica	S	90791 - 02/07/2025 09:00:00 A	Ok	Activity Code Insurance field 'Stop If Primary' is not checked or insura
956	MCARE - Medica	S	90791 - 02/07/2025 09:00:00 A	Ok	Bill insurance even if previously billed for this service
956	MCARE - Medica	S	90791 - 02/07/2025 09:00:00 A	Ok	Benefits Not Exhausted
956	MCARE - Medica	S	90791 - 02/07/2025 09:00:00 A	Ok	Successfully retrieved bill rate code and procedure code
956	MCARE - Medica	S	90791 - 02/07/2025 09:00:00 A	Ok	Subscriber number ok
956	MCARE - Medica	S	90791 - 02/07/2025 09:00:00 A		Update Staff Enrollment, this staff member is not enrolled to bill for t
956	AETNAM - Aetna	S	90791 - 02/07/2025 09:00:00 A	Ok	Activity Code Insurance field 'Skip If Primary' is not checked or insura
956	AETNAM - Aetna	S	90791 - 02/07/2025 09:00:00 A	Ok	Activity Code Insurance field 'Stop If Primary' is not checked or insura

[Close] [Save...]

In the above example, Case No. 6754 failed on the first validation check: "No insurance records." Whereas, Case No. 956 passed six validation checks before hitting a failure.