

**Welcome To  
Medical Insurance  
Billing & Coding**

**Simi Valley Adult School  
Thomas Fitzsimmons, CPC, RHIT**

**Welcome to Week 1  
Sign the Roll-Sheet Every Class!**

- Initial the "roll sheet" and VERIFY the correct spelling of your NAME. This will be used to create your certificate of completion.
- If due to emergency you leave EARLY you MUST write the time you LEAVE in the "OUT" time.
- If you to arrive LATE, you MUST write the time you arrived in the "IN" time.
- Multiple late arrivals, early exits and absences WILL result in being dropped class, so be CAREFUL.
- Emergency situations with note or verification can often be accommodated.
- 15 minute break at 1 p.m. (or thereabouts).

**Your Instructor:  
Thomas Fitzsimmons, CPC, RHIT**

- CPC stands for Certified Professional Coder. The CPC credential is primarily an outpatient or physician coding credential offered by the American Academy of Professional Coders (AAPC).
- AAPC offers the CPC to those with 2 or more years of full-time claims coding experience.
- AAPC has lots of resources for coders, whether or not you are a member. Membership gives access to AAPC's magazine and local member chapter meetings/presentations.

**About your instructor**

- 20+ years of medical claims/insurance experience.
- Completed degree in Health Information Management at Santa Barbara City College, and is a Registered Health Information Technician (RHIT) through American Health Information Management Association (AHIMA).

**About your instructor (cont'd)**

- Billing Instructor at Simi Adult since 2006.
- Former training specialist at Transamerica Occidental Medicare (Part B Carrier).
- Former faculty at Kaplan College and American Career College.
- Claims consultant and claims processing/coding at major insurers and providers such as Blue Cross, Blue Shield, Tenet Health, Ventura County Health, Kaiser Permanente, Motion Picture.


**First-Level Certification**

- Did you know that at the end of this course you can take the certification exam to be a Nationally Certified Insurance and Coding Specialist (NCICS)?
- The NCICS is NOT a mandatory certification for Medical Billers (but it can't hurt, it looks nice on a resume!). The NCICS is offered by the National Center for Competency Testing (ncctinc.com). There is a cost of about \$150 if you desire to take this additional step. Please see "competency testing for medical personnel" in the Simi Adult School catalog for more information.



## Introduce Yourself!

- Please tell us:
  - Your NAME
  - What you would like to get out of this course
  - Where you would be if you hadn't come here today.



## Class Ground Rules


- There is no smoking on-campus. There is a bench outside the main gate for smoking (it looks like a bus bench).
- Cell phones off or on vibrate.
- No talking during lectures or while others are speaking. Raise your hand to be recognized when you have a question or comment!
- Cross-talking is not permitted during lecture, and students may be sent home if they are disruptive.
- Collaboration is permitted for homework. It is NOT permitted on tests.
- There is a 15 minute break around 1 p.m., this is a good time to snack or handle business. However, whenever you need to get up to use the restroom or answer an emergency call, go ahead and do it, as quietly as possible. You do not need permission to leave the room, but you will need to get the key for the restroom (it's at the front wall).



## Lab Rules


- There is to be no food or drink in the computer lab. If you bring water, it MUST be under the desk.
- Computers must be signed off completely and monitors turned off at end of lab.
- Keyboard and mouse must be in tray and pushed under table.
- Push your chair back in.
- If you left smudges on the glass, please Windex the table.
- We SHARE this room with the computer program and need to be very COURTEOUS and NEAT!
- THANK YOU!!!!

If you finish your lab work or test early and there is nothing left to do you may take your break early if you obtains instructor permission.




## About Attendance

- Attendance is critical as we only meet once a week! If you are out you miss a whole week. I will drop you after two absences unless you email me and let me know the situation and request accommodation. See handouts for my email.
- Extra credit is offered, so DON'T EVER PANIC!




## Materials to Purchase

- Books: Although you received the textbook...*you will still need to buy CPT and ICD-10-CM codebooks used later in the course.* Used books may be acceptable depending on what edition they are. Go to [Mediclaiclass.net](http://Mediclaiclass.net) for help finding them.
- Supplies: You will need to purchase a FLASH drive to save your LAB homework and submit flash drive projects when requested.
- You will also need a notebook and pencils.



## Tests/Quizzes

- Tests are MULTIPLE CHOICE!
- Tests are on SCANTRONS.
- Bring a pencil to class for tests, scantrons will be provided.
- All tests are 25 questions long and are OPEN BOOK (but closed mouth!)
- Open book means you will need to read ALL your materials and know the material, but you won't have to memorize as long as you can locate information.
- Medical Billing changes constantly and RESEARCH skills are most important, and I will expect you to find information quickly, but will not demand memorizing information that may change anyway.




## Scantron no-nos!

	(T)	(F)	KEY		(T)	(F)	KEY
1	1	2	<B>	1	1	2	<B>
2	1	2	<B>	2	1	2	<B>
3	1	2	<B>	3	1	2	<B>
4	1	2	<B>	4	1	2	<B>
5	1	2	<B>	5	1	2	<B>
6	1	2	<B>	6	1	2	<B>
7	1	2	<B>	7	1	2	<B>
8	1	2	<B>	8	1	2	<B>


Fill the rectangle for the answer in COMPLETELY covering the letter, no checkmarks, circles, dots, X's or partial bubbles!

Make sure your erase changed answers completely and have a working eraser!




## Homework & Chapter Reviews

- You are expected to complete all assigned homework by the week after it was assigned (by the time the calendar lists new homework).
- Homework is checked off at test times. You can either have chapter homework marked in your book or you may write the answers on a separate piece of paper. You do not need to tear pages out of your books! I will not "collect" textbook homework. Do not turn it in, SHOW it to me when requested.




## 08/18/18: Welcome to Week 1: LAB Assignments

- You will need to sign onto the computers. Upper/Lower Case Counts!
- USER: bcc.lab
- Password: AdultEd1
- You will need first to go to our class website:
  - Medicclaimclass.NET (HINT: it's on the handouts)
- There you will find links to how to order text and code books.




## 08/18/18: Week 1: LAB Assignments (cont'd)

- Go to [www.indeed.com](http://www.indeed.com) (and/or other sites)
- Search the internet for several job listings with detailed job descriptions. You can search for:
  - Medical biller, Medical Insurance Biller, Insurance Biller
  - Medical Coder, Medical Insurance Coder (don't print CCS or RHIT required jobs, those are outside this class scope)
  - Medical Front Office, Medical Office Receptionist
  - Medical Collections, Medical Collector, Medical Accounts Receivable
  - Insurance Specialist
  - Insurance Verification
  - Preauthorization/Precert Clerk
  - Claims Processor
  - Claims Examiner
  - And you may find titles as well!
- SAVE 2 job listings as .pdf files! Save to your FLASH Drive (if you have it – otherwise, bring FLASH drive with 2 jobs saved on it next week!)




## 08/18/18: Job Search Discussion

- Did you find jobs in your area?
- Did you find jobs showing pay?
- Did the pay rates vary significantly?
- Do all the jobs have the same duties or job descriptions?
- What do they all want?
- Remember, applying for a job is the only way to get a job – even if you aren't fully qualified you may be the best (or most cost-effective) applicant!
- Transferable Skills, Resume Preparation and Volunteering.




## 08/18/18: Week 1 Lecture Agenda

- Handouts: You should receive THREE handouts:
  - Syllabus/Calendar (this handout)
  - Large Reading Supplement
  - Exercises/Workbook
- Lecture Topics
  - The 20-Step Claim Cycle
  - Eligibility and Provider Networks – "do you take my insurance?"
  - If insurance is not "Indemnity" the out of Network benefits (if any) are only dire emergencies, more than 30 miles out of area and authorized referrals.
  - Chapter 1 Powerpoint.




**08/18/18: Week 1: \*\*HOMEWORK Assignment (cont'd)**

- Read textbook **Chapter 1** – Introduction to the Medical Billing Cycle.
- Do the review questions at the end. At a minimum, do all multiple choice and true/false and short fill-in questions.
- Check your e-mail, there will be additional information and extra credit projects!
- We will have a practice (ungraded) **scantron quiz** when we meet next. The topic is customer service and computer security in the office. Bring a pencil and do it for practice!



**08/25/18: Welcome to Week 2 LAB Agenda**

- Sign the "roll sheet."
- Turning on and signing into the Lab Computers.
- USER: bcc.lab
- Password: AdultEd1
- Using the FLASH drives in Windows. Plug in the flash drive. Go to the Windows Menu, "Computer" or desktop "my computer" and look for the flash drive. It will NOT be A, B, C or D drives! Look for Es, Fs, Gs.
- Click to open the drive.
- Right click to get a menu and select "new folder"
- Name the new folder "Medisoft."
- Do this process again to make folders "Websearch" and "Claims."
- If you have problems, ask!




**Week 2 Lab Agenda, Continued**

- Go to [www.junk4school.yolasite.com](http://www.junk4school.yolasite.com) and download the file "Medisoft 19 Valerius Backup." Save it or move it to your "Medisoft folder on your FLASH drive.
- Save a job search to your websearch folder as a pdf file by choosing print and changing the printer to PDF.
- When you are done saving, find the FLASH drive and right click it to EJECT it. Then and only then, you may remove it from the computer. **DON'T LOSE IT!**
- Shut Down the computers and monitors, clean the work stations to leave them as you found them!




**08/25/18: Week 2 Lecture Agenda**

- Chapter 3 PowerPoint
- Patient Registration – that "Clip Board"!
- Obtaining patient information, retaining patient information, confidentiality, ethics and privacy measures.
- HIPAA Administrative "Simplification" and how it will complicate your job! (HIPAA Handout)
- What is "Individually Identifiable Information"? Discussion.
- Taking A Scantron Quiz
- **Customer Service and Computer Security Quiz**







**08/25/18: Week 2 \*\*Homework**

- Read **Chapter 3** – Patient Encounters and Billing Information. Complete chapter review simple t/f, multiple choice and fill-ins.
- Read **handout** on Managed Care.
- Read **handout** on HIPAA **CAREFULLY!**
- Once you have completed the above, begin reading **Chapter 2**.
- **HOLIDAY 09/02/2018**
- **SEE YOU ON 09/09/2018!!**







**09/08/18: Welcome to Week 3 Lab Agenda**

- Google search "HIPAA Violation" Locate two violation news stories and save as PDF to your flash drive. (Create a folder for "HIPAA")
- Go to the website for the Office for Civil Rights (OCR) and review patient rights and method of complaint.
- Discussion: What kind of violations did you find and how do you think they could have been avoided?





**09/08/18: Week 3  
Lecture Agenda**

- ROI Desk: The VALID request form required information elements.
- HIPAA Exceptions: Worker's Comp Conditions, and Requests for TPO: "Treatment" (Verified Continuity of Care Requests), "Payment" (Insurance Billing) and "Operations" (Quality Audits, Budget Planning, Accreditation).
- Prisoner records and Psych Notes are not released. A summary may be created, however.





**09/08/18: Week 3  
\*\*HOMEWORK**

- **Read Textbook Chapter 2** – Electronic Records, HIPAA and HITECH.
- **Read Chapter 7**, the CMS-1500 Claim Form.
- Be prepared for the **HIPAA Quiz** by reviewing the HIPAA handout!





**09/15/18: Welcome to Week 4  
LAB Agenda**

- Download the CMS-1500 claim form PDF from textbook or mediclaimclass website and save to your FLASHDRIVE.
- Discuss the purpose of the fields on the billing form (Powerpoint).
- Do claim forms for textbook **exercises 7.1, 7.2 and 7.3 on the PDF form** (save each one separately with the name 7.1 or 7.2 or 7.3 to your FLASHDRIVE).

**09/15/18: Week 4  
Lecture Agenda**

- HIPAA Privacy vs. Security
- HIPAA and Patient's Rights/Patient Requests.
- State VS. Federal Law and HIPAA.
- Penalties for non-compliance.
- HIPAA Review
- Questions?
- **HIPAA Quiz**

**09/15/18: Week 4  
\*\*Homework**

- Finish your claim forms and PRINT them out and bring them to class next time. You may also print blank forms and fill them out and bring them to class next time.
- **Read Chapter 8** – Private Payers and do t/f, multiple choice review questions AND complete and print a claim form for 8.4 A and B. Read Chapter 10 – Medicaid, but you do not need to do the chapter review.
- **Read Appendix A** in your textbook on MediSoft (back of the book, page A-1 to A-6)







**09/22/18: Welcome to Week 5  
LAB Agenda**

- Introduction to **MediSoft** Practice Management/Patient Accounting software.
- MediSoft Powerpoints: Databases and Transactions.
- Open MediSoft Program (big M icon)
- Input Claim form 8.4 A and 8.4 B.
- Backup MediSoft database to your FLASHDRIVE.



**09/22/18: Week 5  
Lecture Agenda**

- PowerPoint on Insurance terminology and insurance basics for review.
- PowerPoint on Medicare Program.
- Types of Insurance:
  - Indemnity VS. Managed care
  - HMO VS. PPO
  - EPO VS. POS
  - Private VS. Government
  - Individual VS. Group
  - Insurance VS. Self-Funded
  - Medi-Cal program VS. Medicare



**09/22/18: Week 5  
\*\*Homework**

- **Read Chapter 9** – Medicare in your textbook, do chapter reviews that are t/f, multiple choice and simple fill-ins.
- Go to Medicare Website  
<https://www.cms.gov/>
- Review your **handout** “insurance glossary” and be prepared for the **Insurance Terms Quiz** next time.




**09/29/18: Welcome to Week 6  
LAB Agenda**

- Use **MediSoft** to input your claim form **Chapter 9 (Medicare)**.
- Use transaction entry to input charges and payments.
- Print a CMS 1500 claim form and a patient billing statement.
- View the Patient Ledger.
- Create a manual Patient Ledger.



**09/29/18: Week 6  
Lecture Agenda**

- **Insurance Terms Quiz**
- Medicare Parts A, B, D and Advantage, (sometimes called C)
- Eligibility for Medicare, difference between Medicare and Medicaid.
- Medi-Cal *IS* Medicaid.




**09/29/18: Week 6  
\*\*Homework**

- **Read Chapter 10** - Medicaid.
- Read **handout** on Medi-Cal
- Go to Medi-Cal website:  
<https://www.medi-cal.ca.gov/>
- **Read Chapter 13** – Payments (RA – EOB), Appeals and Secondary Insurance.







**10/06/18: Welcome to Week 7  
LAB Agenda**

- Creating a Manual Ledger
- Accounts Receivables
- Charge transactions vs. payments or credits transactions.
- Charges add to balance.
- Payments and credits subtract from balance.



### 10/06/18: Week 7 Lecture Agenda

- When to apply an adjustment.
- The difference between billed amount and approved amount.
- Network discounts vs. out of pockets (OOPs).
- Reading Remittance Advice (R/A) fields.
- Patient Liability for charges: CO vs PR charges.

### 10/06/18: Week 7 Lecture Agenda

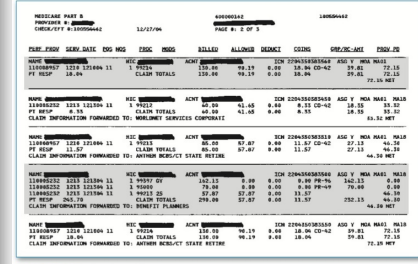










FIGURE 13.4 Medicare RA

### 10/06/18: Medicare Math \*Assigned\*





(Participating or Non-Participating)

- 1) Example
- Service | Billed | Allowed | Deductible |
- Surgery \$150 \$100 \$0
- \*\*For an assigned claim:
- Q. What is the write-off amount?
- Q. How much will Medicare pay to the provider?
- Q. What will the patient's responsibility be?





### 10/06/18: Medicare Math NON Participating/NON-Assigned

- 2) Example
- Service | Billed | Limit Chg | Deduct |
- Surgery \$150 \$100 \$0
- \*\*For a NON-assigned, NON-participating provider claim:
- Q. How much will Medicare pay to the provider?
- Q. What will the patient's responsibility be?




### 10/06/18: Lab Tests (always Assigned, clinical tests 100% payment)


- 3) Example
- Service | Billed | Allowed | Deductible |
- Lab Test \$50 \$10 \$0
- \*\*For an assigned claim (labs paid at 100% and ALWAYS assigned, participating or non-participating):
- Q. What is the write-off amount?
- Q. How much will Medicare pay to the provider?
- Q. What will the patient's responsibility be?

### 10/06/18: Not Medically Necessary (ABN Issues)

- 4) Example
- Service | Billed | Allowed | Deductible |
- Surgery \$150 \$0 \$0
- \*\*Not medically necessary surgery, ABN completed the day after surgery.
- Q. What is the write-off amount?
- Q. How much will Medicare pay to the provider?
- Q. What will the patient's responsibility be?



**10/06/18: Week 7**  
**\*\*Homework**

- **Read Chapter 14** – Patient Billing and Collections.
- Read Handout on Collections.
- Review California Medical Debt Regulations  
[https://oag.ca.gov/consumers/general/collection\\_agencies10](https://oag.ca.gov/consumers/general/collection_agencies10)
- Read Medicare Handout and review for next week's **Medicare Quiz**.



**10/13/18: Welcome to Week 8**  
**LAB Agenda**


**Medisoft:** Applying an insurance payment from R/A.

- The check deposit process.
- Applying payments to patient accounts from the deposited money.
- Applying “write-off” adjustments.
- Printing a Statement or Ledger.




**10/13/18: Week 8**  
**Lecture Agenda**

- Medicare PowerPoint and Medicare quiz review
- Medicare and other Federal programs, Tricare, CHAMPVA, Medicaid. Coordination issues.
- **Medicare Quiz**



**10/13/18: Week 8**  
**\*\*Homework**

- **Read Chapter 11** – Tricare and CHAMPVA.
- Read Chapter 15 claims instructions and prepare first 5 claims on paper at home.



**10/20/18: Welcome to Week 9**  
**LAB Agenda**


- **Chapter 15 Cases** (first 10 claims).



**10/20/18: Week 9**  
**Lecture Agenda**

- Workers' Compensation: Illness or Injury related to work.
- When something is work-related.
- Forms used.
- State Programs, Federal Program and Private Carriers.
- Disability and Income Replacement.
- Medical-Legal issues. Approved WC treatment and Liens filed against appeals board.






**10/20/18: Week 9**  
**\*\*Homework**

- **Read Chapter 12** – Workers' Compensation and Disability, complete chapter review questions.
- Go to the California W/C website:  
<http://www.dir.ca.gov/dwc/>




**10/27/18: Welcome to Week 10**  
**LAB Agenda**

- **Chapter 15** Cases (remaining 10 claims).
- Missing ICD and Procedure Codes.




**10/27/18: Week 10**  
**Lecture Agenda**

- Diagnosis Coding: Abstracting (capturing) medical information in codes for statistical and billing purposes.
- History of Diagnostic Coding.
- Overview of the ICD-10-CM codebook, organization and coding conventions.
- Index: Main term, Indented Subterm.
- Tabular: Category-level instructions.
- Excludes 1 vs. Excludes 2.




**10/27/18: Week 10**  
**\*\*Homework**

- **Read Chapter 4** – Diagnostic Coding, complete chapter review.




**11/03/18: Welcome to Week 11**  
**LAB Agenda**

- Using the Internet to find ICD-10-CM codes and to crosswalk ICD-9-CM and ICD-10-CM.
- <http://www.icd10codesearch.com/>
- <https://www.aapc.com/icd-10/codes/>




**11/03/18: Week 11**  
**Lecture Agenda**

- ICD-10-CM Coding Conventions.
- Multiple Code Scenarios.
- Primary or First Listed Code.
- Symptoms Vs. Diagnosis.
- Rule out, possible, suspected conditions not coded on outpatient or physician claims, must use symptom if no diagnosis.



**11/03/18: Week 11**  
**\*\*Homework.**


- Read the Handout on ICD Coding Conventions.
- Code the ICD exercises in the **workbook/exercise** handout.



**11/10/18: Week 12.**  
**Lab Agenda.**


ICD-10 Workbook Answers.

- ICD-10 Review for Quiz.
- **ICD-10-CM Quiz**



**11/10/18: Week 12.**  
**Lecture Agenda.**

- Intro to the CPT Book: Organization, structure, and how to find codes with Index OR with Tables of Contents for Sections.
- Section Guidelines.
- Code Bundling and Cascades.
- Modifiers for exceptions.
- NCCI edits.




**11/17/18: Welcome to Week 13**  
**Lab Agenda**

- Finding basic CPT codes by index OR table of contents.
- Refer to the Workbook/Exercise handout.



**11/17/18: Week 13**  
**Lecture Agenda**

- Intro to the CPT Book: Organization, structure, and how to find codes with Index OR with Tables of Contents for Sections.
- Section Guidelines.
- Code Bundling and Cascades.
- Modifiers for exceptions.
- NCCI edits.



**11/17/18: Week 13**  
**\*\*Homework. HOLIDAY:11/25/18!**

- **Read Chapter 5** – Introduction to CPT Coding. Do chapter review.
- Read Surgery Section guidelines. Read Surgery glossary in handout.
- Complete **workbook/exercise** handout exercises for CPT coding for Surgery, Radiology and LAB.






**12/01/18: Welcome to Week 14  
LAB Agenda**





- Answers to Surgery, Radiology and Lab **Workbook** exercises.
- Complete New Patient Vs. Established Patient exercises.
- The Key Components of an E/M service.
- Time as a component.










**12/01/18: Week 14  
Lecture Agenda**

- Evaluation and Management (E/M) Visit coding rules.
- CPT guidelines
- 1995 CMS rules.
- 1997 CMS rules.
- Hospital “rules.”





**12/01/18: Week 14  
\*\*Homework**

- Read **Chapter 6** – Visit Codes and Compliant Billing. Do the review questions.
- Go to the Medicare website’s NCCI instructions.  
<https://www.cms.gov/Outreach-and-Education/Medicare-Learning-Network-MLN/MLNProducts/downloads/How-To-Use-NCCI-Tools.pdf>



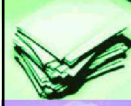

**12/08/18: Welcome to Week 15  
LAB Agenda**

- Starting the E/M Coding **Workbook** Exercises.
- The Ncctinc.com website for NCICS test (optional).
- References on the AAPC and AHIMA websites.





**12/08/18: Week 15  
Lecture Agenda**

- CPT Modifiers and NCCI Edits.
- The Global Surgery package and its affect on E/M Coding.





**12/08/18: Week 15  
\*\*Homework**

- Complete the E/M Exercises in your **workbook** handout.
- Review the CPT Coding “**Cheat Sheet**” and print it and bring to class.
- Be ready for **CPT Quiz**.





**12/15/18: Welcome to Week 16  
LAB Agenda**

- Answers to the CPT **Workbook** exercises.
- Abstracting Reports
- Using E/M templates
- Using the E/M Audit grids and the Palmetto E/M audit website using internet explorer (only)  
<http://www.palmettogba.com/internet/eandme.nsf/New?OpenForm>
- Abstracting from Surgical Reports
- Resume Templates – Lotta Skills





**12/15/18: Week 16  
Lecture Agenda**

- **CPT Quiz**
- Coding or Billing or Both?
- Coding may not be the entry level to a job and also may not be done in many billing departments.
- Many coders never do billing.
- Many billers never do coding. This can be a problem in some situations!

**12/15/18: Week 16  
\*\*Homework. VACATION:  
12/22/18, 12/29/18, 01/05/19!!!**

- Prepare your resume and email it to me as a PDF or DOC (not docx) file for extra credit.
- Read **Handout** on Appeals.
- **SEE YOU 01/12/2019!!!!!!**

**01/12/19: Welcome to Week 17  
LAB Agenda**





- Work on Resume Cover Letters
- Work on an Appeals Letter







**01/12/19: Week 17  
Lecture Agenda**

- Appeals process for denials and reduced payments.
- Medicare Appeals process.

**01/12/19: Week 17  
\*\*Homework**

- Please be sure you can attend the graduation! You will need to receive your certificate of completion.
- A photo will be taken and posted on the class website. If you are uneasy about being in the photo, you can hold your certificate in front of your face.
- The photo is for your use and to prove you graduated should there ever be a question.




**01/19/19: Welcome to Week 18  
Graduation Session: Lab**

- Discussion of Extra Credit Answers.
- Student **Surveys**.
- Return All Homework and Extra Credit work.



**01/19/19: Welcome to Week 18  
Graduation Session: Lecture**

- Pot Luck
- Career Center and Job Search.
- Professional Organization and Network.
- **Certificates** of completion.
- Graduation **Photo**.



**01/19/19: \*\*HOMEWORK**

- Contact me if you need information or assistance!
- The website should continue to be available for your reference!
- Continue your career development and have a peaceful and rewarding life!



**HOLIDAYS**

- 09/01/18
- 11/24/18
- 12/22/18
- 12/29/18
- 01/05/19