Clearinghouse Reports

Clearinghouse reports help you manage and monitor various billing workflow tasks; from claim processing to posting payments. These reports are generated on a daily, weekly or monthly basis depending on the type of report. From the Clearinghouse Reports section, you can search, review and print clearinghouse reports.

It is recommended that someone in your business office is assigned the responsibility to monitor clearinghouse reports and take action on a daily basis.

Navigate Find Clearinghouse Report

1. Click Encounters > Clearinghouse Reports. The Find Clearinghouse Report window opens.
   a. Kareo Rejection Troubleshooting Guide: Click to view help articles to troubleshoot and resolve common rejections.
   b. Missing Electronic Remittance Inquiry Request: Click to submit a missing ERA.
   c. All: Click to view a list of all clearinghouse reports.
   d. Claim Processing: Click to view a list of the following daily claims reports.
      • Kareo internal validation reports.
      • Clearinghouse acknowledgment/acceptance/rejection reports.
      • Payer acknowledgment/acceptance/rejection reports.
   e. Electronic Remittance: Click to view a list of Electronic Remittance Advice (ERA) notifications and Electronic Funds Transfer (EFT Check) reports.
   f. Patient Statements: Click to view a list of the following patient statement report from the mailing house.
• Patient statement acknowledgement report.
• Patient statement batch confirmation.
• Patient statement errors.
• Patient change of address.

g. Other Reports: Click to view a list of payer-provided EOBs (Explanation of Benefits).

h. Look For: To search for a specific report, type all or part of a word, date or ID number, then click Find Now.

i. Search in: To search in a specific field, select from the drop-down list, then click Find Now.

j. Show unreviewed only: Check to view unreviewed reports only.

k. Report details:
   • ID: Clearinghouse report ID assigned by Kareo.
   • Report: Type of report marked as Processing, ERA, Statement, and Other.
   • Type: Where the report originated. Internal, Clearinghouse or Payer.
   • Source: Specific clearinghouse or payer.
   • Received: Date the file was received in Kareo.
   • Reviewed: Whether the report was marked as reviewed.
   • Notes: Brief report description.
   • Comments: Populated from Comments added on the report.

l. Pagination: Click the arrows to navigate pages.

m. View: Click to open the highlighted report.

n. Mark as Reviewed: After reviewing a report and no further action is needed, it is recommended to mark the report as reviewed.