

ENCOUNTER / CHARGE ENTRY FAQ

How do I copy a previous encounter / charge?

Service History contains a copy feature. This allows the user to create a new charge, using part or all of an existing charge.

Click [Last Service] date on a new charge to access Charge History and the Copy options. Options include: Copy Dx Only, Claim-Level Only or Full Charge.



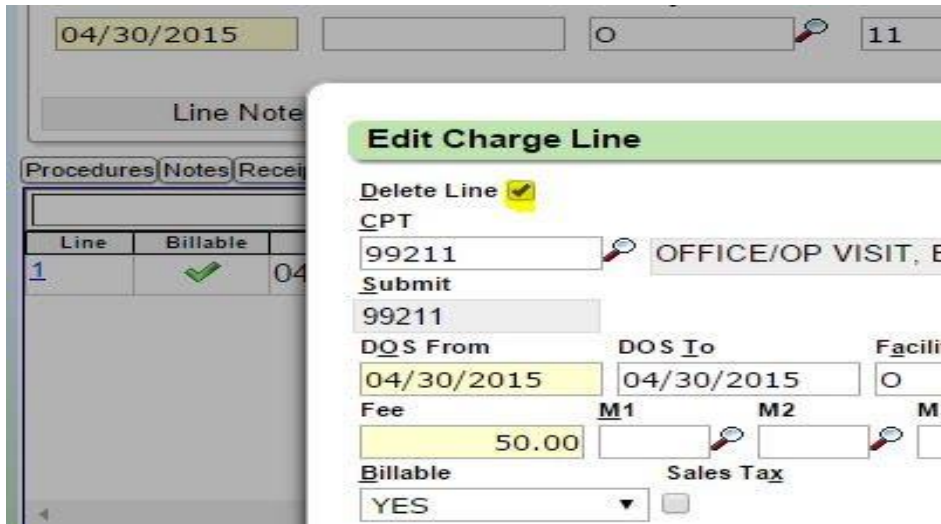
The screenshot shows the 'Post Charge' interface for patient 'TEST, TEST'. The 'Last Service' date '02/28/2017' is highlighted. A 'Copy' dropdown menu is open, showing options: '- SELECT -', '- SELECT -', '- SELECT -', 'Dx Only', 'Claim-Level Only' (highlighted in blue), and 'Full Charge'.

DOS	Encounter	Line	CPT	Submit	Modifiers	Global Days	Diagnosis	Charge	Rendering	Facility	POS	Insurance Balance	Patient Balance	Add'l Info	Copy
02/28/2017	45445	1	96213	96213		0	E56	50.00	SCRNA [1CRNA]	OFFICE [0]	11	50.00	0.00	View	- SELECT -
02/17/2017	45408	1	G0246	G0246		10	A01.00	100.00	JACOBS [1]	OFFICE 2 [1]	11	100.00	0.00	View	- SELECT -
10/03/2016	45106	1	96213	96213		0	(10)	150.00	JACOBS [1]	OFFICE [0]	11	135.00	0.00	View	- SELECT -

How do I delete a CPT from an Encounter

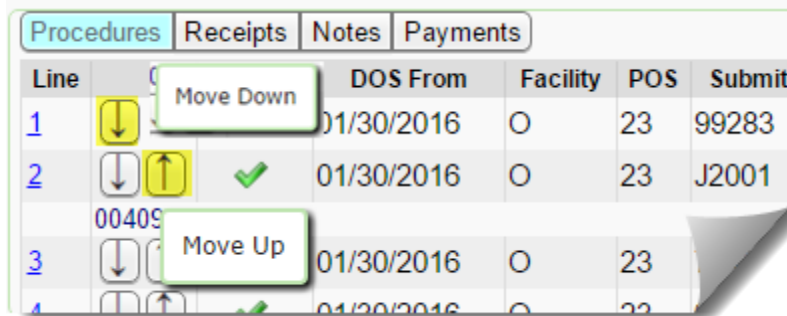
Please Note: This action is *only* advisable if the claim has not yet gone to the Insurance. The Reference Batch of the Encounter must be open and the user should be attached.

1. Click [Modify Charge] on the Encounter Dashboard
2. Click on the line you want to delete
3. Click in the check-box labeled 'Delete Line'
4. [Save] the 'Edit Charge Line' pop-up
5. [Save] the Encounter



How do I reorder the CPT lines on an Encounter?

Use the arrows in the Procedure area to move the CPT lines on the Modify Charge Screen



Why can't I reorder the CPT lines on the Modify Charge page?

You have a window of time to reorder the CPT lines. The Reference Batch of the Encounter must be 'open' (therefore the Accounting Period must be 'open').

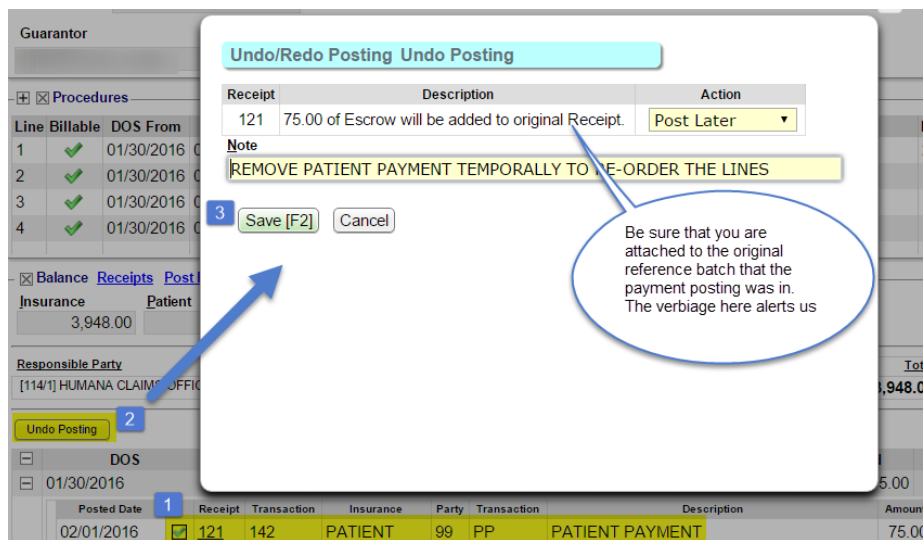
If you notice you need to make changes to line 1 on the new charge screen, you will say NO to the copay popup> make your changes> Save > Modify charge and say YES to the copay popup and SAVE.

If you miss this step:

You may have a payment applied to one of the lines. Charge lines with payments cannot be moved.

If a patient payment has been applied and you want to reorder the lines, you must Undo the patient payment.

1. Check the box next to the payment
2. Click 'Undo Posting'
3. Save
4. Click on the [Modify Charge] button on the Encounter, reorder the lines and Save
5. Re-apply the patient payment



Receipt	Description	Action
121	75.00 of Escrow will be added to original Receipt.	Post Later

Note
REMOVE PATIENT PAYMENT TEMPORALLY TO RE-ORDER THE LINES

Save [F2] Cancel

Be sure that you are attached to the original reference batch that the payment posting was in. The verbiage here alerts us

How to link or unlink Diagnostic codes to a specific line?

1. Click the line item
2. In the DX Link field type in the DX numbers to link * the format is no comma, so if you need to use DX 10, then type A
3. SAVE

Referring: Statement:
 Admitte: ANSI Field:
 Templat:
 Billing Note:

Diagnosis ICD10: 10
 Dx 1: B35.1 Dx 2: M79.674 Dx 3: M79.675 Dx 4: L97.511
Thrush (unguiculi) Pain in right Pain in left toe(s) Non-pressure
 Dx 7: Dx 8: Dx 9: Dx A (10):

Procedures
 DOS: 05/17/2018 Facility: 1 POS: 11 CPT:
CITY PODIA Office
 Dx Link: Billable: YES Fee:
 Line Note:

Line	Billable	DOS From	Facility	POS	Submit	CPT	M1
2	✓	05/17/2018	1	11	11721	11721	59
1	✓	05/17/2018	1	11	97597	97597	

Modify Charge
 Delete Line ☐
 CPT: 97597
 Submit: 97597
 DOS From: 05/17/2018
 M1: M2:
 Fee: 132.00
 Billable: YES
 Rendering: 4
 Statement Description:
 Note:
 Dx Link: 45

Why is the Insurance Profile grayed out?

There is either a payment posted or this charge is in a closed period. Go to the Insurance Management page to make changes to the Insurance Profile for this encounter

Modify Charge
Patient: 20798
Encounter: 17714

Post Date: 10/26/2016 Reference Batch: 975

Patient
 Patient: 20798 [Edit](#)
 Last Service: 10/26/2016 Appointment(s): None
 Case: - SELECT - [Edit](#) Authorization: - SELECT - [Edit](#)
 Guarantor: Insurance: BCBS / PATIENT [No Effective - No Exp]

Insurance Profile must be changed via Insurance Management (Period is closed or Transactions are Posted).

How do I send a Replacement or Void Claim?

On the 'Encounter Dashboard' > Click to [Modify Charge]

At the bottom of the page > Claim dropdown- choose Void or Replacement > Save and Resubmit.

Modify Charge

Replacement: Sends as a Replacement/Corrected Claim (ANSI 2300 CLM05-3). ICN Required per 5010.

Void: Sends as a Void Claim (ANSI 2300 CLM05-3). ICN Required per 5010.

Force Print: Original Replacement Void

Claim ⓘ: Original ▼

How do I send DME to the correct payer?

For Medicare and some Medicaid, DME claims must be sent to a different payer. This DME payer should be set up in the Insurance Library as a unique Insurance. You will need to add the DME policy to an 'Active Insurance Profile' for the patient.

From the 'Post' or 'Modify' Charge page > Choose the correct Insurance Profile from the 'Insurance' Drop-down

Post Charge Patient: 20012 Name: TEST, PORKY PIG

Post Date: 07/31/2017 Claim Type: Professional ▼

Patient

Patient: 20012 [Edit](#) TEST, PORKY PIG | 01/01/1960 | 57 years 7 M | M

Last Service: 07/31/2017 (?) Appointment(s): None (?)

Case: - SELECT - [Edit](#) Authorization: - SELECT - [Edit](#)

Guarantor: TEST, PORKY PIG(DEFAULT) Insurance: MEDICARE (XXXXXXXXXA) / TRICARE ▼

Claim

MEDICARE (XXXXXXXXXA) / TRICARE NO (1231) / PATIENT [No Effective - No Expiration] (DEFAULT)

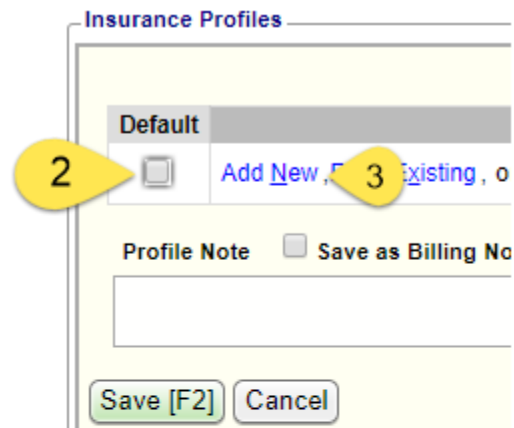
DME (XXXXXXXXXA) / TRICARE NO (1231) / PATIENT [No Effective - No Expiration]

SELF PAY



* if the Insurance does not yet exist > Click the Edit link next to the patient information to proceed to the Patient Dashboard, then click 'Insurance Management' to add

How to add DME to an active Insurance Profile

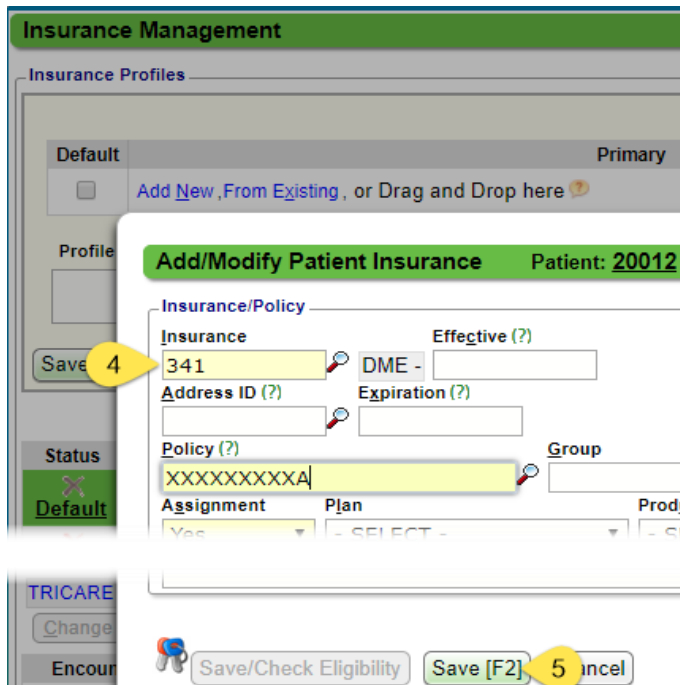
1. Go to Insurance Management > Click [ADD new Insurance Profile]
2. Un-Check the 'Default' box
3. Click 'Add New'



The form is titled "Insurance Profiles". It has a "Default" checkbox (callout 2) and a "Save as Billing No" checkbox. Below these is a "Profile Note" text area. At the bottom are "Save [F2]" and "Cancel" buttons. Callout 3 points to the "Add New, Existing, or" link.

Insurance Management				Patient: 20012
Insurance Profiles				
Add New Insurance Profile (callout 1)				
Status	Encounters	Created	Primary	Second
 Default	2	08/16/2017	MEDICARE [109] Policy: XXXXXXXXXXA Group:	TRICARE NO [102] Policy: 1231 Group:
 Active	0	07/31/2017	SELF PAY	

4. Select the DME Insurance Policy



Insurance Management

Insurance Profiles

Default Primary

☐ Add New, From Existing, or Drag and Drop here

Profile

Add/Modify Patient Insurance Patient: **20012**

Insurance/Policy

Insurance Effective (?)

Address ID (?) Expiration (?)

Policy (?) Group

Assignment Plan Product

Save **4**

Status ☒ Default

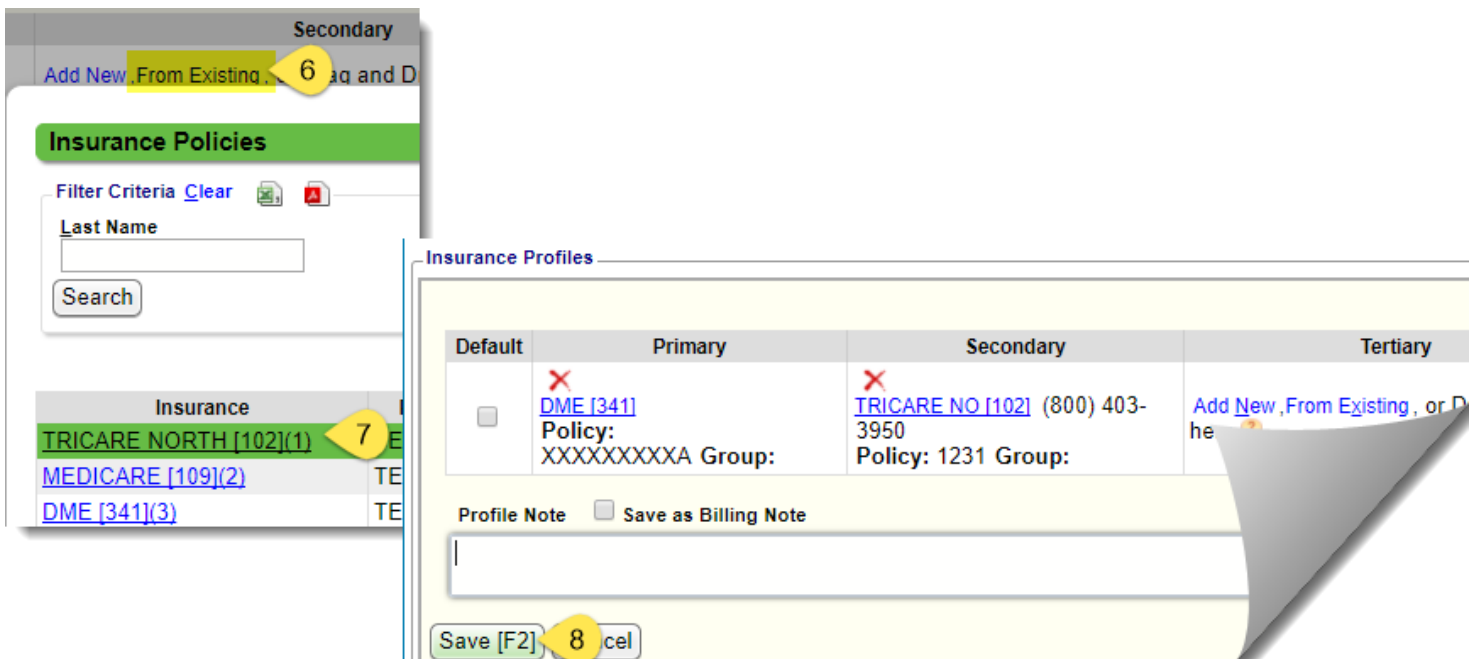
TRICARE

Change

Encour

Save/Check Eligibility Save [F2] **5** Cancel

5. Save
6. Next Add Secondary and Tertiary if any exist > From Existing
 - If no additional insurance exist proceed to step 8
7. Choose from list of Policies
8. SAVE the Insurance Profile



Secondary

Add New, From Existing **6** Drag and Drop

Insurance Policies

Filter Criteria [Clear](#)

Last Name

Search

Insurance

TRICARE NORTH [102](1) **7**

MEDICARE [109](2)

DME [341](3)

Insurance Profiles

Default	Primary	Secondary	Tertiary
<input type="checkbox"/>	<input checked="" type="checkbox"/> DME [341] Policy: XXXXXXXXXA Group:	<input checked="" type="checkbox"/> TRICARE NO [102] (800) 403-3950 Policy: 1231 Group:	Add New, From Existing, or Drag and Drop

Profile Note ☐ Save as Billing Note

Save [F2] **8** Cancel

Reverse or Delete a Charge (Encounter)

When should I Reverse a Charge (Encounter)?

It is first good to review the consequences of this action by asking some questions.

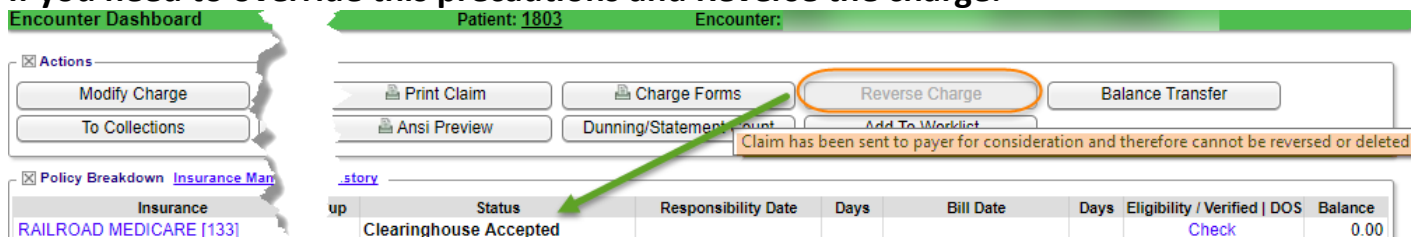
- Is an insurance payment posted and is there a chance the insurance could do a take-back? If so, perhaps the charge should NOT be reversed as you will need to re-post the Insurance to the new charge. You may, instead, add a new corrected claim and the balance for the original Encounter written off.
- If there is *no* insurance payment and the payer has rejected the claim you can reverse the charge to make financial changes to it.
- If the claim has *never* been sent to insurance, and you are *not* in a closed accounting period, reopen the Reference Batch, attach and make your financial changes.

Keep in mind you would NOT use the [Undo] button and the [Reverse Charge]. Reversing the charge will automatically Undo any posted transactions.

Why can't I Reverse a Charge? The Reverse Charge button is grayed out

If the claim is on it's way to the clearinghouse or payer, it may not be *recommend* to Reverse. Therefore we have a precaution to gray out the button, when the 'Claim Status' shows that the claim is out to the payer or clearinghouse the Reverse button is grayed out.

If you need to override this precautions and Reverse the charge:



Encounter Dashboard Patient: 1803 Encounter:

Actions: Modify Charge, To Collections

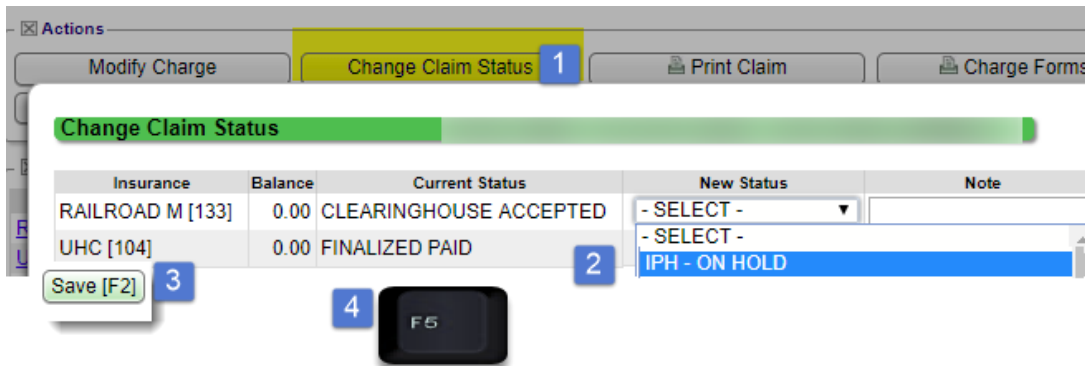
Policy Breakdown Insurance Man: RAILROAD MEDICARE [133]

Print Claim, Charge Forms, Reverse Charge, Balance Transfer, Ansi Preview, Dunning/Statement, Add To Worklist

Claim has been sent to payer for consideration and therefore cannot be reversed or deleted

up	Status	Responsibility Date	Days	Bill Date	Days	Eligibility / Verified DOS	Balance
	Clearinghouse Accepted					Check	0.00

1. Click [Change Claims Status]
2. Toggle the status to something like 'HOLD'
3. [SAVE]
4. Click 'F5' or refresh the screen > The [Reverse Charge] button is now live



Insurance	Balance	Current Status	New Status	Note
RAILROAD M [133]	0.00	CLEARINGHOUSE ACCEPTED	- SELECT -	
UHC [104]	0.00	FINALIZED PAID	- SELECT - IPH - ON HOLD	

How do I Reverse an Encounter, to Delete or Modify?

If there are payments posted against this Encounter, new Receipts is created by this action. The new Receipt must be manually posted. Take special note of the Insurance posting. We suggest you take a screenshot if you do not have an ERA to refer back to or otherwise make note of the payments. On the off chance, a Patient Payment incorrectly posted you may want to delete that receipts **BEFORE** you reverse the charge.

Click  from the Encounter Dashboard

1. Use 'Method' dropdown:

Reverse for Deletion: Deletes Encounter by creating an equal but opposite Encounter that is not editable and is fully reported in the current accounting period.

Reverse for Modification: Deletes Encounter by creating an equal but opposite Encounter that is not editable *AND* creates a 'clone' of the original that *is* editable and is fully reported in the current accounting period.

2. Add A Note

3. Check all boxes

- If this message is present, transactions (payment/adjustments) existing on the original Encounter will be Undone. When transaction is a **payment** there is Escrow on a **new** receipt. Resolve the new Escrow *immediately*, whenever possible. The payments posted are detailed below, you are required to manually re-post these to the new (cloned) encounter or elsewhere.

Charge Reversal
Patient: **1803**

Post Date
 02/01/2015

Method
 Reverse for Modification

Method
 - SELECT -

Reason For Reversal
 NEED TO ADD CPT AND REBILL

Method
 - SELECT -
 Reverse for Deletion
 Reverse for Modification

I Understand:

- ☒ All Transactions will be Undone which will result in a Receipt with Escrow
- ☒ A new Encounter will be created with opposing Procedure Fees
- ☒ A new Encounter will be created as a clone of Encounter 2752
- ☒ This Encounter cannot be "Un-reversed"

Transactions that will be Undone:

Line	DOS	Posted	Receipt	Insurance	Party	Transaction
1	01/31/2015	02/17/2015	3991	RAILROAD M [133]	1	X2N
1	01/31/2015	02/17/2015	3991	RAILROAD M [133]	1	IP
1	01/31/2015	02/17/2015	3991	RAILROAD M [133]	1	ALWD
1	01/31/2015	02/17/2015	3991	RAILROAD M [133]	1	CO45
1	01/31/2015	02/17/2015	3991	RAILROAD M [133]	1	CO
2	01/31/2015	03/21/2015	9431	RAILROAD M [133]	1	CO45
2	01/31/2015	03/21/2015	9431	RAILROAD M [133]	1	IP

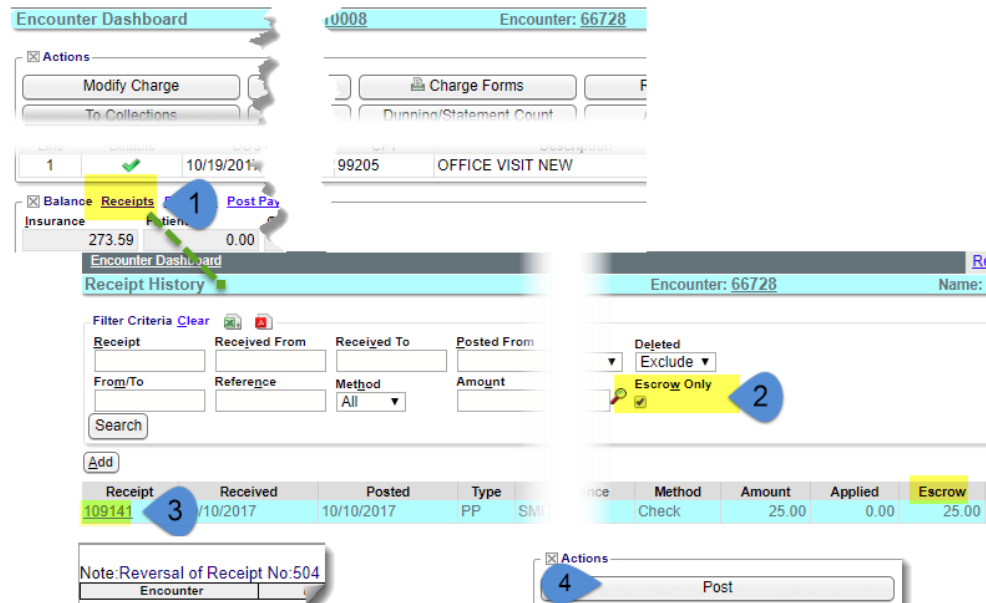
Save [F2]

Cancel

4. [Save] - this button is gray if you have not check all the boxes (3)

After you have deleted or modified an Encounter with Payment transactions, follow these steps:

1. Click the Receipts link from the Encounter or Patient Dashboard Filter the Receipts for



The screenshot shows the 'Encounter Dashboard' for Encounter: 66728. A blue circle with the number '1' points to the 'Receipts' link in the 'Balance' section. Another blue circle with the number '2' points to the 'Escrow Only' checkbox in the 'Deleted' filter criteria. A third blue circle with the number '3' points to a receipt with ID '109141' and a note 'Reversal of Receipt No: 504'. A fourth blue circle with the number '4' points to the 'Post' button in the 'Actions' section.

'Escrow Only'

2. Click on the Receipt link that has the Note: 'Reversal of Receipt No. XX' link and the correct dollar amount
3. [Post] the new Receipt

What happens if there is a linked appointment on the reversed or deleted charge?

Revered for modification: The appointment is linked to the new encounter

Reversed for Deletion: The appointment is striped and is eligible to be linked on another encounter

How do I delete an Incomplete Charge?

Incomplete charges have not been reported as part of our A/R therefore we are able to simply delete these. Click [Delete Charge] on the Encounter Dashboard

Encounter Dashboard		Patient: <u>347325</u>	Encounter: <u>27366</u>
• Incomplete Charge. Reason: Charge created by interface			
<div style="display: flex; align-items: center;"> <div style="margin-right: 10px;"> <input checked="" type="checkbox"/> Actions </div> <div style="display: flex; gap: 10px;"> <div style="border: 1px solid #ccc; padding: 5px 10px; background-color: #f0f0f0;">Modify Charge</div> <div style="border: 1px solid #ccc; padding: 5px 10px; background-color: #ffff00;">Delete Charge</div> <div style="border: 1px solid #ccc; padding: 5px 10px; background-color: #f0f0f0;">Send To Worklist</div> </div> </div>			
Add a reason note > [Save]			
Delete Charge		Patient: <u>347325</u>	Encounter: <u>27366</u>
encounterid	Patient ID	Patient Name	
27366	347325		
Posted			
Reason For Delete			
DUPLICATE 6084			
There are no payments to revert			

Why should I link appointments to an encounter?


We use the 'Missing Encounters' report as an audit to be sure we have entered in charges for all patients for which it is appropriate. We should match or **link** appointments during charge entry so that this report is accurate.

Missing Encounters report is found on the scheduling page, we recommend you regularly run it to check if all the appointment types designated have corresponding charges.

How can I tell if encounter is not linked to an appointment?

Go to the Encounter Dashboard, look to the 'Linked Appointments' field, if it is blank, no appointment has been linked to this encounter

Patient: [REDACTED]		Encounter: 9264		Name: [REDACTED]	
Print Claim	Charge Forms	Reverse Charge	Balance Transfer		
Invoice Preview	Dunning/Statement Count	Add To Worklist			

Facility	POS	Charge Type	Ref Batch/User	Linked Appointments
[REDACTED]	11	Production	968 [REDACTED]	[REDACTED] 

How do I link an Appointment to an encounter?

How do I link an Appointment to an encounter?

You are presented with a popup during charge entry if an appointments exist. If you have an interface with an EMR, the system may autoselect the appointment for you.

To manually link an appointment to this charge,

1. If you don't get a popup, Click [None] next to appointment(s)
2. Simply highlight the correct appointment
3. Click [Enter] on your keyboard. The 'Appointments' button updates from None to [1 Linked].

This function ties the appointment to the charge.

Post Charge
Patient: **1081**

Post Date: 08/16/2016 Claim Type: Professional

Patient
 Patient: 1081 [Edit](#) HARAK, GEORGE | 03/28/1923 | 93 years 5
 Last Service: None **1** Appointment(s): None **1 Linked**

Appointment Lookup

The following Appointments exist for the selected Patient and are not linked to a Charge. Choose an

Filter Criteria [Clear](#)
 Date: Resource: All Type: All Inc: ☐
 Search

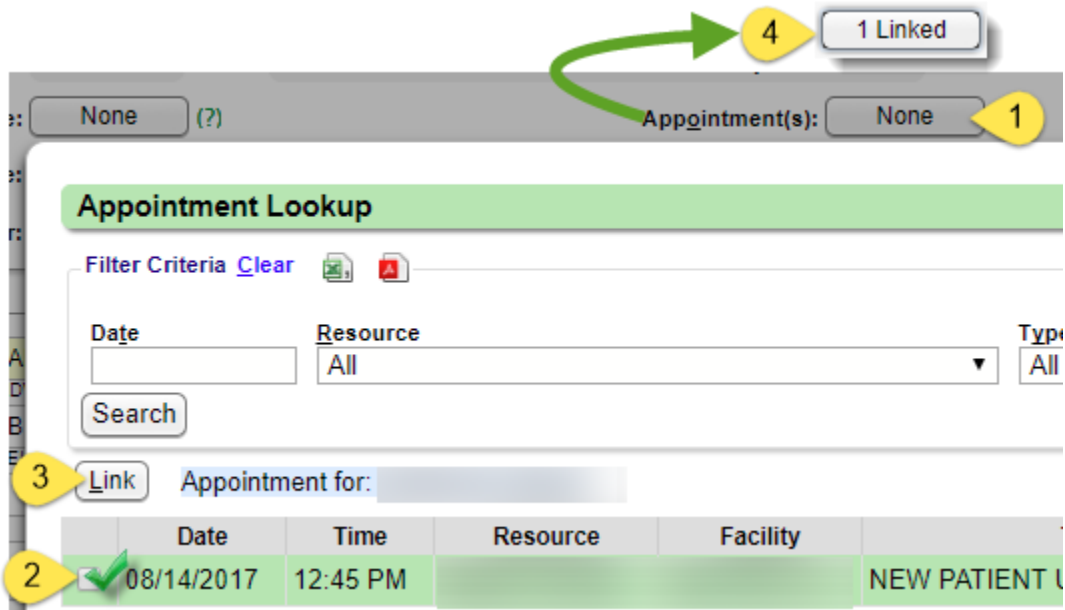
Appointment for: Harak, George

Date	Time	Resource	Facility	Type	Inc
09/08/2016	5 AM	SMITH	OFFICE	NEW P	<input checked="" type="checkbox"/>

Enter

If you do not choose to link the appointment during charge entry, you may return to [Modify Charge], click the [NONE] button for options to link the encounter.

1. Click Appointment(s) [None]
2. In the popup check the box(s) representing the appointment(s) this encounter satisfies
3. Click [Link]
4. The [None] changes to [1Linked]



The screenshot shows the 'Appointment Lookup' window. At the top, there is a button labeled 'None (?)' and a button labeled 'Appointment(s): None'. A green arrow points from the 'Appointment(s): None' button to a yellow callout '4' pointing to a button labeled '1 Linked'. A yellow callout '1' points to the 'Appointment(s): None' button. Below this is a green header 'Appointment Lookup'. Underneath is a 'Filter Criteria' section with a 'Clear' link and two icons. There are input fields for 'Date' and 'Resource' (set to 'All'), and a 'Search' button. Below the search fields is a 'Link' button with a yellow callout '3' pointing to it. Below the 'Link' button is a table with columns: 'Date', 'Time', 'Resource', 'Facility', and 'Type'. A yellow callout '2' points to a checkbox in the first row, which is checked and has a green checkmark. The first row contains the values: '08/14/2017', '12:45 PM', 'NEW PATIENT U'.

How do I link multiple appointments to one encounter?

From the Post Charge or Modify Charge Screen on the Encounter:

1. Click the button next to 'Appointment(s)'
2. Check the boxes next to the dates of service you want to Link to this charge
3. Click [Link]
4. The button next to 'Appointment(s)' updates to the number of appointment that are linked

Post Charge
Patient: 5763
Name: SMITH, ALICE

Post Date: 08/16/2016
 Claim Type: Professional

Patient
 Appointment(s): 2 Linked 4

Patient: 5763
 [Edit](#)
 SMITH, ALICE | 01/01/1949 | 67 years 8 M | F

Last Service: 09/02/2016
 Appointment(s): None 1

Appointment Lookup

Filter Criteria [Clear](#)

Date
 Resource
 Type
 Include Linked to Other Encounters

Search

[Link](#) 3 Appointment for: Smith, Alice
 Page 5

	Date	Time	Resource	Facility	Type	Reason	Case	Authorization
<input type="checkbox"/>	08/16/2016	08:30 AM	SMITH	OFFICE	OFFICE VISIT			SCHEI
2 <input type="checkbox"/>	08/31/2016	09:00 AM	TEST	CLINIC	ESTABLISHED PATIENT			SCHEI
<input checked="" type="checkbox"/>	09/01/2016	08:15 AM	SMITH	OFFICE	ESTABLISHED PATIENT			SCHEI
<input checked="" type="checkbox"/>	09/07/2016	08:45 AM	SMITH	OFFICE	INJECTION			SCHEI

NDC

How to I add an NDC to the Procedure code library for all future Charges?

Go to Libraries in the sidebar > Procedure Code > Choose Procedure Code > Check-box for NDC > Add NDC info > Save

Tip: Add a line note with the description in the 'Default Line Note in Charge Entry' field. For certain Insurances, they will reject the claims if this is missing; however, no Insurance will reject if the line is present.

Libraries > Procedure Codes

Edit Procedure Code

CPT	Submit CPT	Billable	Description
J7298	J7298	YES	Levonorgestrel iu 52mg 5 yr
Revenue Code	Modifiers	Statement Description (?)	Valid From
		Mirena	01/01/2016
POS	TQS	Global Days	Reporting Group
		0	
Fee	Units/Procedure	Taxable	Allow Future DOS
1340.00	1.00	<input type="checkbox"/>	<input type="checkbox"/>
NDC 2410	ANSI Fields Group	HCFA Box 19	
<input checked="" type="checkbox"/>	NDC	NDC 2410	
Unit of Measure	Quantity	NDC	Effective
UNIT [UN]	1.00	50419 - 0423 - 01	01/01/2016
Default Line Note in Charge Entry			Submit Claim Rules
Levonorgestrel			

How do I add NDC number to a claim if it has not be setup on the Procedure code library?

Add to an existing Encounter:

- Click [Modify] on the Encounter Dashboard
- Click the line item > Click [Procedure Info] button > Add NDC > Save
- Save Charge

Modify Charge

Patient: 183

Modify Charge Line

This charge is part of the reference batch 23 that was already closed. You will not be able to effect dollar amount of the charge. If you need to make dollar amount changes you'll have to go through the charge reversal process can create new charge that can be modified.

CPT: J7325, Submit: J7325, Procedure Info: SYNVISOR OR SYN...

DOS From: 02/05/2016, Facility: GB

M1: , M2: , M3: , Fee: 38.00, Unit: 96.00, Total: 134.00

Billable: YES, Sales Tax: , Rendering: IMB, Statement Description: , Note: , Dx Link: 123, Emergency Service: ☐

Procedures:

Line	Billable	Procedure	Unit	Fee	Total
1	✓	J7325	1	38.00	38.00
2	✓	J7325	1	96.00	96.00
3	✓	J7325	1	38.00	38.00

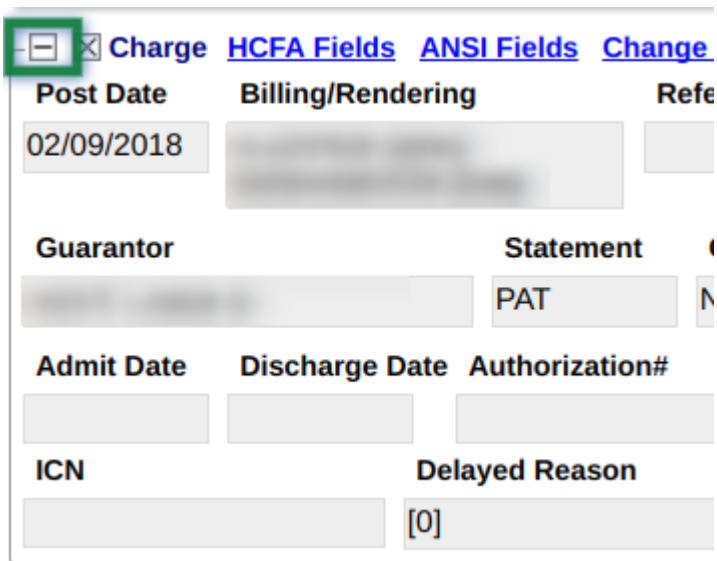
NDC Information

Product/Service ID: , Unit of Measure: , Quantity: , Save [F2], Cancel

How can I tell if the NDC is missing from the encounter?

Expand the Charge section on the Encounter

- In this example there is no NDC



☒ Charge [HCFA Fields](#) [ANSI Fields](#) [Change](#)

Post Date	Billing/Rendering	Ref
02/09/2018		
Guarantor	Statement	
	PAT	
Admit Date	Discharge Date	Authorization#
ICN	Delayed Reason	
	[0]	

- In this example there is an NDC

☐ ☒ **Charge**
[HCFA Fields](#)
[ANSI Fields](#)
[Change Log](#)

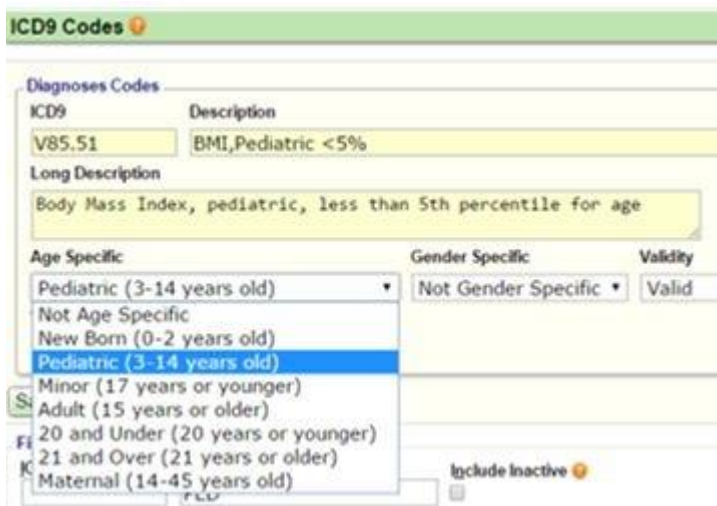
Post Date	Billing/Rendering	Referrin
02/06/2018		
Guarantor	Statement	Cas
	PAT	REF
Admit Date	Discharge Date	Authorization#
Ansi Fields		
Line: 3 = LIN:00085-0566-05 CTP:ML CTPQ:1.00		
ICN	Delayed Reason	
	[0]	

Authorizations and Cases

How do I change the Validation Warning:

Diagnosis: xxx is not valid for the Patient's age (xx). Patient must be x-x years old

Go to: Libraries > ICD Codes > Look up the code and click on the blue hyperlink to edit. At the top of the page within the edit section there's a drop-down called 'Age Specific' > Change the drop-down > Save





The screenshot shows the 'ICD9 Codes' edit form. The 'Diagnoses Codes' section displays the ICD9 code 'V85.51' with the description 'BMI, Pediatric <5%'. The 'Long Description' is 'Body Mass Index, pediatric, less than 5th percentile for age'. The 'Age Specific' dropdown menu is open, showing options: 'Pediatric (3-14 years old)', 'Not Age Specific', 'New Born (0-2 years old)', 'Pediatric (3-14 years old)' (highlighted), 'Minor (17 years or younger)', 'Adult (15 years or older)', '20 and Under (20 years or younger)', '21 and Over (21 years or older)', and 'Maternal (14-45 years old)'. The 'Gender Specific' dropdown is set to 'Not Gender Specific', and the 'Validity' is 'Valid'. There is an 'Include Inactive' checkbox at the bottom right.

Why is the Facility grayed out during charge entry?

In the Reference Batch a Facility was chosen.

If a Facility is added in the Reference Batch, all charges entered in this batch auto-populate with the Facility.

Reference Batch List

Filter Criteria [Clear](#)  

Batch	Status	Date From	Date To	Description	Facility	User
21	Tcraps	4-10-16				

Add/Edit Reference Batch 179:34

Batch# 21 User ID Tcraps Description 4-10-16

Batch Status Closed Facility 8


Batch Date 07/07/2016 Reference Total 0.00 Payments 0.00

Allowable Batch Functions

Payment Posting ☒ Charge Posting ☒ Patient Registration ☐

Post Date

Modify Post Date ☐ New Post Date



Post Charge

Post Date: 07/07/2016

Patient

Patient:

Last Service:

Case:

Guarantor:

Claim

Facility: 8

How do I move the balance from one responsible party on an Insurance Profile to another

1. On the Encounter Dashboard click [Balance Transfer] > Click in the radio button on the 'Transfer From' side
2. Use the check boxes to de-select any CPT line item(s) that should not be part of the transfer
3. On the 'Transfer To' side, click the radio button to choose where to move the balance
4. The 'Re-Bill' check box determines if the claim is flagged for Re-submission after the balance transfer

Balance Transfer Patient ID: 1620700 Encounter ID: 14679 Patient: SMITH, MICHE

Post Date: 02/16/2013 Re-Bill: 2

Transfer From				Transfer To			
Insurance	Role	Balance	After Transfer	Insurance	Role	Balance	After Transfer
AARP INSUR	SECONDARY	5.84	0.00	MEDICARE	PRIMARY	0.00	0.00
<input checked="" type="checkbox"/> DOS: 09/11/2012 ~ CPT: 11720		1.63	0.00	<input type="checkbox"/> AARP INSUR	SECONDARY	5.84	0.00
<input checked="" type="checkbox"/> DOS: 09/11/2012 ~ CPT: G0127		4.21	0.00	<input checked="" type="checkbox"/> PATIENT	PATIENT	0.00	5.84

Transaction Note: ☒ Save as Billing Note
 Aarp is not longer active. Balance is due by patient. Thank you!

Why wasn't I presented with an 'Apply Copay' popup for the patient payment received for this DOS?

The apply-copay popup presents in charge entry if two conditions are met:

1. The Receipt must be entered with a 'Copay' amount in the Copay field
2. The 'Received Date' of the Receipt must be the same as the Date of Service

Receipt Dashboard

☒ Receipt Info [Modify](#)

Post Date	Received Date	Type	Entered By	ERA	Batch
07/11/2016	07/11/2016	PP			44

Patient: [23534] Balance: 0.00

Guarantor: [23961] Balance: 0.00

Reference/Check: CASH

Check	Cash	Card	Amount	Copay	Escrow
0.00	12.00	0.00	12.00	0.00	12.00

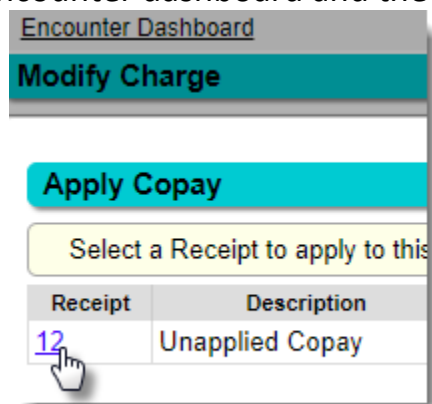
In the above example the Copay field doesn't reflect a copay amount, so there would be no popup.

Sample popup to 'Apply Copay', Click [Enter] on your keyboard to 'marry' the charge and the Copay together or Click on the receipt #.



What should I do if I accidentally did not choose to 'Apply Copay' on popup?

You may click [Modify] from the Encounter dashboard and the popup will present again.



OR

Click the 'Post Copay' hyperlink on the encounter, you will be presented a popup that looks like the screenshot below. Click [SAVE]. This link only appears if no Copay has been posted to this encounter

Guarantor Statement Case

Att

☒ Procedures [1 - \$120.00]

Line	Billable	DOS From	To	Facility
1	✓	10/16/2018	10/16/2018	O

☒ Balance Receipts ERAs [0] Post Payment **Post Copay**

Insurance	Patient	Collection
120.00	0.00	0.00

Responsible Party

[108/1] BCBS OF LOUISIANA

Undo Posting

Line	DOS	CPT
1	10/16/2018	99214

☒ Policy Breakdown Insurance Management Claim History

Insurance	Policy	Group

☒ Validations

✓ Passed

Post Copay 119

Receipt 12 has a Received Date matching the DOS on the first line of this Charge.
Save to apply Copay on this Receipt.

Policy Information

Insurance	Effective	Expiration
BCBS OF LO [108]		

Post Uncollected Copay Post Date

☐ 10/16/2018

Received Date Received From

10/16/2018

Check	Cash	Card	Total Received
0.00	0.00	40.00	40.00

Check Date Ref.No/Check No POS Pa

10/16/2018 Yes

Use This Amount as Copay

40.00

Apply This Amount as Patient Payment

0.00

Note

ESTABLISHED

Save [F2] Cancel

OR

You may go to the Receipt > Click Post > Choose 'All Services' from the 'Show' Drowdown > Use the force apply credit feature by holding down the [Ctrl] key on your keyboard while checking the appropriate checkbox. This will show as a patient credit until insurance adjudication.


Post Patient & Collection Payments
Receipt: 77477
Receipt Info

Receipt	Received Date	Posted	Check Date	Received Amount
77477	07/13/2016	07/13/2016	07/13/2016	25.00
Patient	Balance			
3399	SIMONE, FEDERICO			13.00

Payment Application

Show
 Services With Balance
 Services With Balance
 Services With Collection Balance Only
All Services

Include Additional Patients Under Same Guarantor [0] : ☐
 Total Escrow
 0.00 😊

Ctrl + 

Patient	DOS [Encounter]	Dunning/Statement Count	Charge	Balance	
[3399] SIMONE, FEDERICO	11/26/2011 [8406]	0 / 0	185.00	50.00	<input type="checkbox"/>
[3399] SIMONE, FEDERICO	05/13/2015 [44961]	0 / 0	68.00	68.00	<input type="checkbox"/>
[3399] SIMONE, FEDERICO	07/13/2016 [45173]	0 / 0	25.00	25.00	<input checked="" type="checkbox"/>

What if I did not have the copay details to post until after the charge is in or we only have an incomplete charge?

- Use the 'Post Copay' link on the encounter dashboard
- This presents a popup to key in the receipt and post it to this encounter

This hyperlink only appears if there is no copay posted to this encounter yet.

Encounter Dashboard
Patient: 10008 Encounter: 66731

Actions

Modify Charge

Change Claim Status

To Collections

Re-Apply Patient Credit

Procedures [1 - \$131.74]

Line	Billable	DOS From	To
1	✓	12/13/2017	12/13/2017

Balance [Case](#) [Receipts](#) [ERAs \[0\]](#) [Post Payment](#) [Post Copay](#)

Insurance	Patient	Collection
131.74	0.00	0.00

Responsible Party
 [110/1] AETNA

Undo Posting

Line	DOS	CPT
1	12/13/2017	00312

Policy Breakdown [Insurance Management](#) [Claim History](#) [Payments](#)

Insurance	Policy	Group	
AETNA [110]	XXXXXXX		Ready For R
PATIENT			Hold Coordin

Post Copay

Policy Information

Insurance	Effective	Expiration	Copay
AETNA [110]			

Post Uncollected Copay ⚠ **Posted**
☐ 12/13/2017

Received Date **Received From**
 12/13/2017

Check	Cash	Card	Total Received
\$0.00	\$20.00	\$0.00	\$20.00

Check Date

Ref.No/Check No

PQS Payment

Use This Amount as Copay

Apply This Amount as Patient Payment

Note

Why am I getting this validation warning?

- Facility on the Case does not match the Facility on the Charge

If the case has a facility set on it, and the facility on the new charge is not the same you will get this warning. You should either clear the facility on the Case or correct the facility on the charge.

Modify Charge

Post Date: 02/15/2017 Reference Batch: 80

Patient
 Patient: 59312 [Edit](#) 01/01/1947
 Last Service: 02/09/2017 Appointment:
 Case: LEFT TOTAL KNEE ARTHROPLASTY [Edit](#) Author:
 Guar:

Claim
 Facility:
 Referral:
 Admitt:
 Template:
 Billing No:
 Diagnosis:

Add/Edit Case

Patient: 59312 Name:

Case

Type	Description
MRI [MRI]	LEFT TOTAL K

 Insurance Profile
 - SELECT -

Case Facts/Charge Defaults

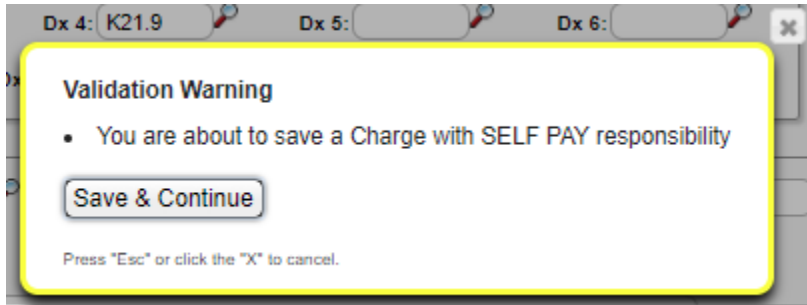
Cause	Date of Current	Accident
- SELECT -		

Facility	Assigned Provider	Ref
112	9	

Self Pay

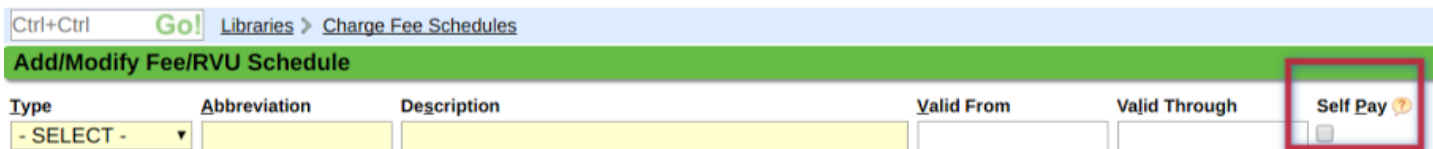
What is the validation warning 'You are about to save a Charge with a Self Pay'

Validation warning, with the yellow outline, is simply informational. In this case, the user is confirming they want to intentionally save a charge with out Insurance or 'Self Pay'. If you agree, then click [Save & Continue]



Ways to apply a self pay discount:

- Self pay **charge fee schedule** - we allow multiple charge fee schedules

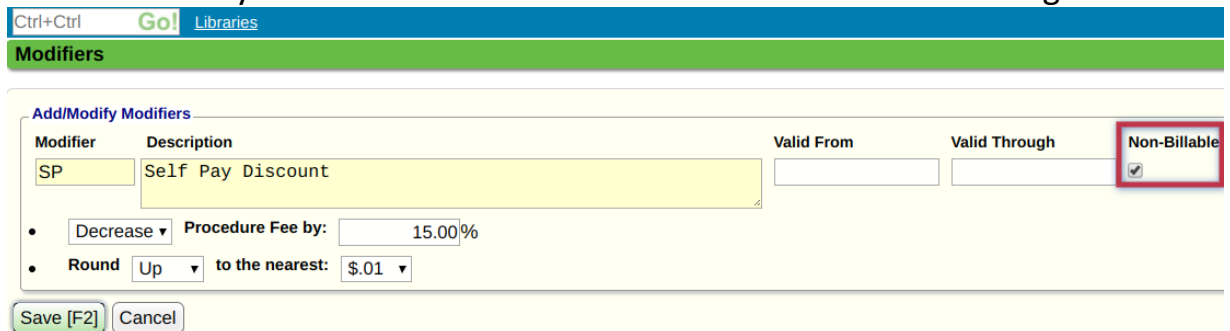


Ctrl+Ctrl Go! Libraries > Charge Fee Schedules

Add/Modify Fee/RVU Schedule

Type	Abbreviation	Description	Valid From	Valid Through	Self Pay
- SELECT -					<input type="checkbox"/>

- Custom **modifier** -
 - Modifier Library > check 'Non Billable' to be sure the modifier never goes on a claim



Ctrl+Ctrl Go! Libraries

Modifiers

Add/Modify Modifiers

Modifier	Description	Valid From	Valid Through	Non-Billable
SP	Self Pay Discount			<input checked="" type="checkbox"/>

• Decrease Procedure Fee by: 15.00%
 • Round Up to the nearest: \$.01

Save [F2] Cancel

Post Adjustment

- we suggest creating a custom transaction code to track this discount - see below for an example

Add/Modify Payment/Adjustment Codes

Transaction Code	Abbreviation	Description	Type
SPWO	SP ADJ	SELF PAY DISCOUNT	CREDIT [C] ▼

Group	Responsibility	Report As	Provider
WP	PATIENT ONLY [PAT] ▼	WRITE-OFF [WO] ▼	- SELECT - ▼

Active: Yes ▼
 Significant: Yes ▼
 Frequency:
 Mass Write Off: ☐
 Include on Statements: ☒

How do I key in charges for dispensed cash pay items, or self pay charges?

- On the 'Modify Charge' page, in the Insurance Drop down, choose 'Self Pay'

Modify Charge Patient: 9001 Encounter: 42

22 years 10 M | M

Appointment(s): 1 Linked (?)

Authorization: - SELECT - [Edit](#)

Insurance: SELF PAY ▼



BCBS (A) / PATIENT [No Effective - SELF PAY]

- After the charge is keyed in, if you have forgotten to toggle to self pay, go to 'Insurance Management'
 - Highlight
 - Checkbox encounter
 - Click [change profile/ rebill]
 - Toggle from insurance to self pay > SAVE * this only works if the full balance is with one insurance

Insurance Management
03

Insurance Profiles

[Add New Insurance Profile](#)

Status	Encounters	Created	
 Default	12 1	02/13/2014	RAILROAD M
 Active	0	02/09/2018	SELF PAY

Policies not part of an Insurance Profile [Add New Policy that is](#)

There are no records available

Highlighted Profile Information & Encounters

Selected Encounters

65291

From Current Profile

RAILROAD M (A405388124) / UHC (800284638) / PATIENT

To New Profile 4

SELF PAY ▾

☒ Re-Bill 2

Claim History Note
Save as Billing Note

Change Profile/Rebill
3
Rebill

Encounter		
65291	<input checked="" type="checkbox"/>	08/12/2014 2

Why don't self pay charges have a claim status?

There is no 'Claim' Status for Self Pay, as no 'claim' will ever go to insurance.