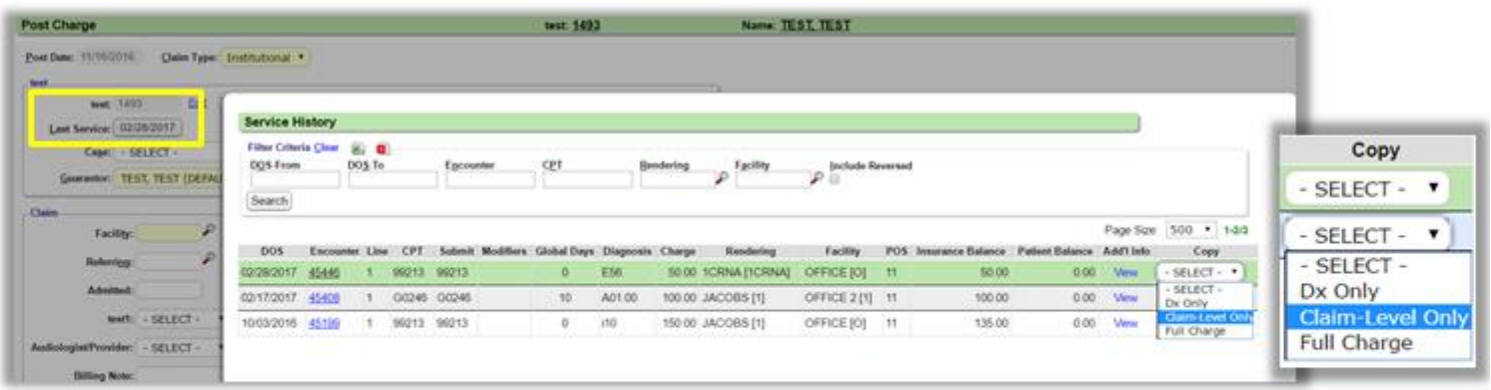
ENCOUNTER / CHARGE ENTRY FAQ

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.

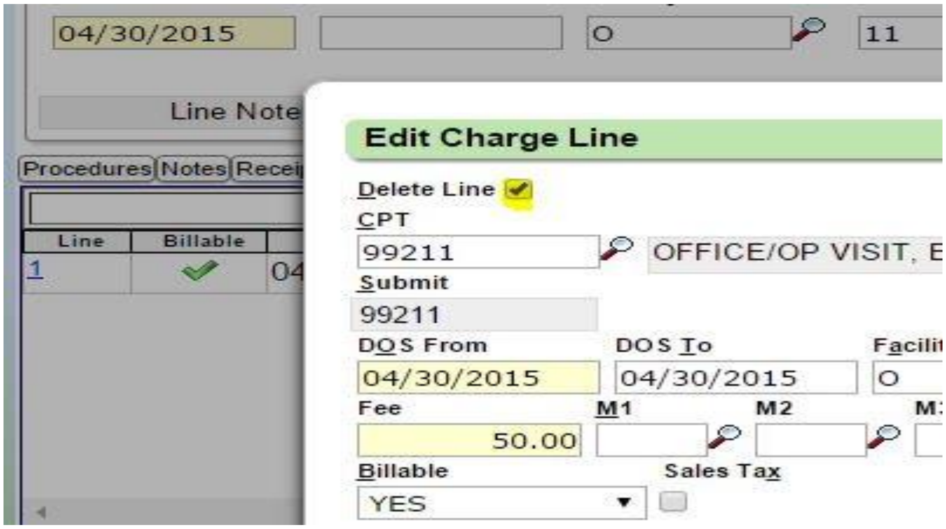
Click [Last Service] date on a new charge to access Charge History and the Copy options. Options include: Copy Dx Only, Claim-Level Only or Full Charge.



How do I delete a CPT from an Encounter

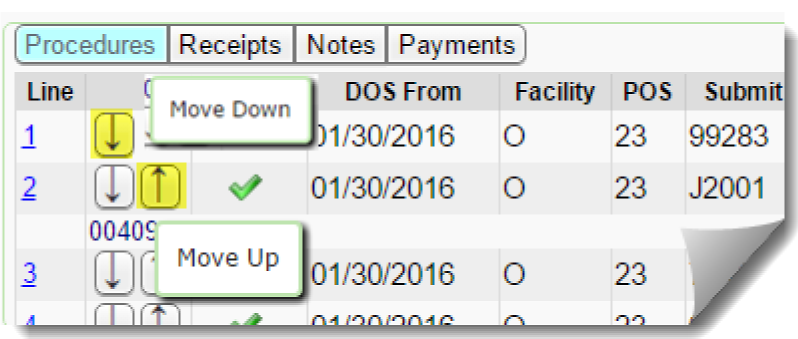
Please Note: This action is *only* advisable if the claim has not yet gone to the Insurance. The Reference Batch of the Encounter must be open and the user should be attached.

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?

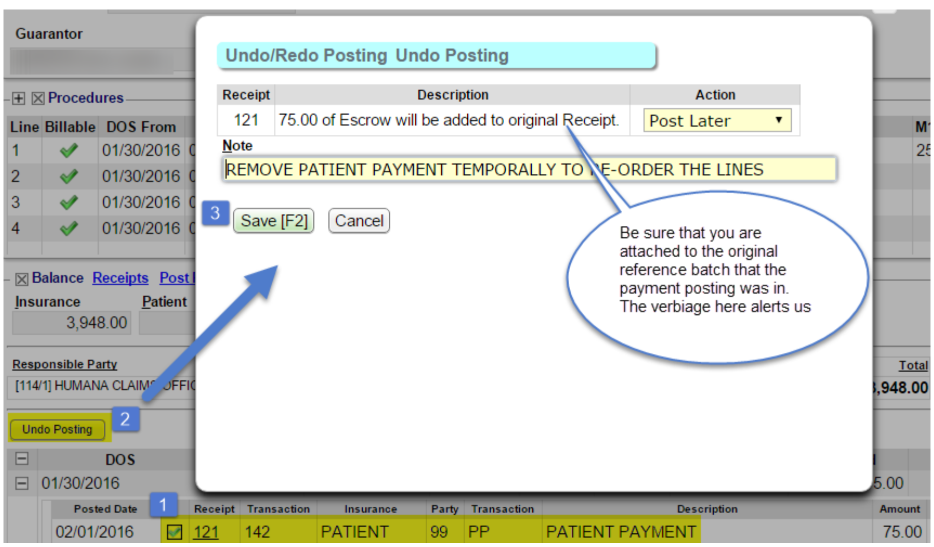
You have a window of time to reorder the CPT lines. The Reference Batch of the Encounter must be 'open' (therefore the Accounting Period must be 'open').

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



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

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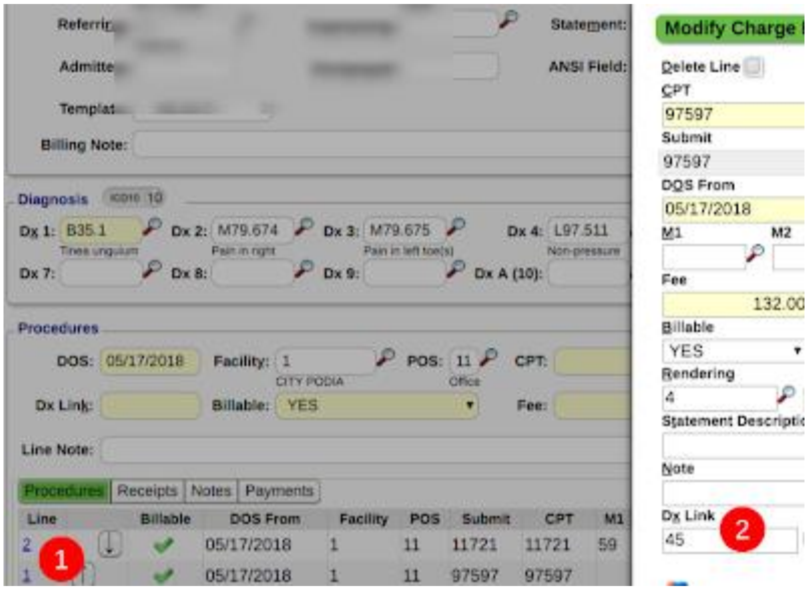
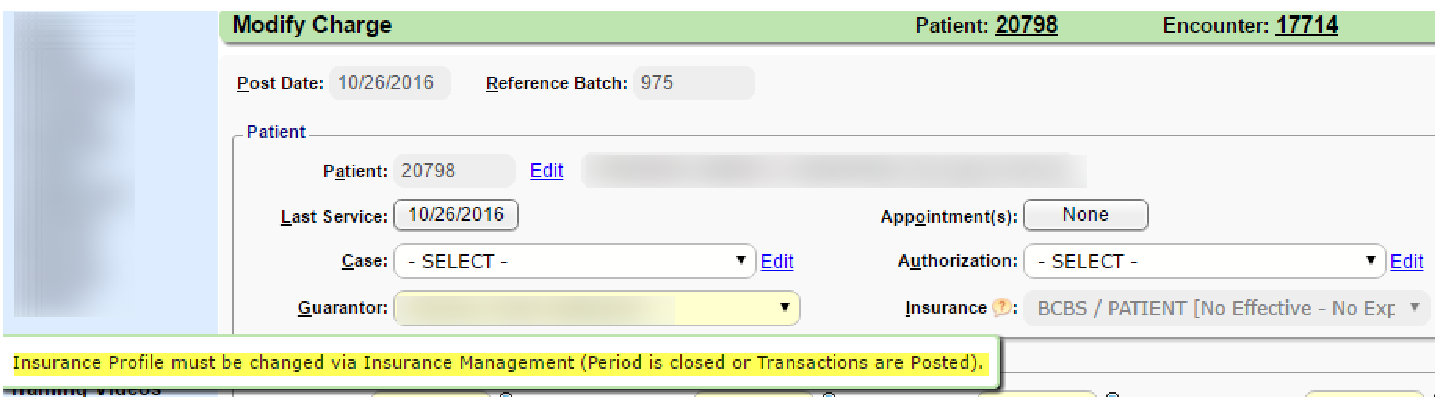


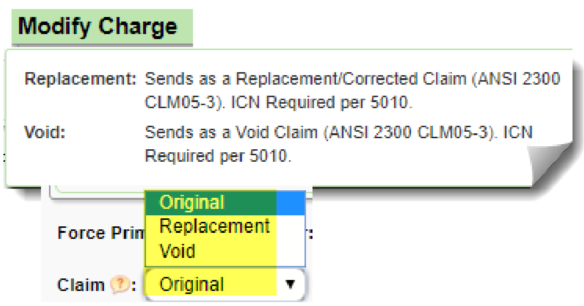
Why is the Insurance Profile grayed out?

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



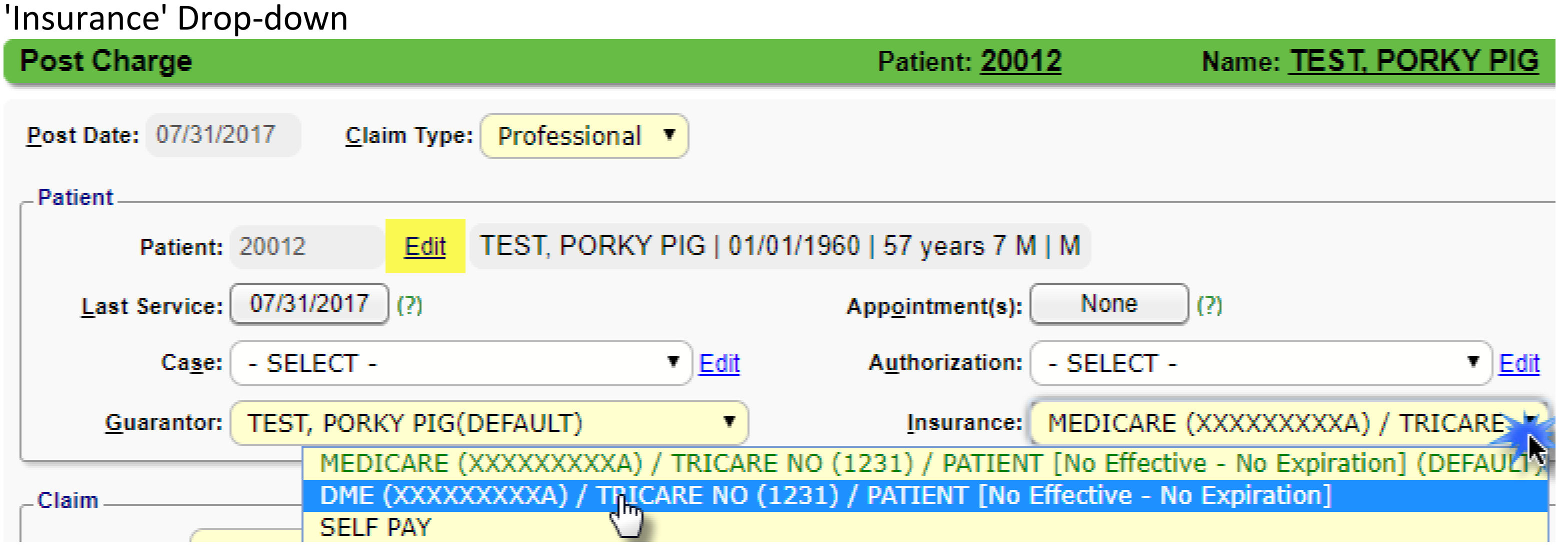
How do I send a Replacement or Void Claim?

On the 'Encounter Dashboard' > Click to [Modify Charge]
At the bottom of the page > Claim dropdown- choose Void or Replacement > Save and Resubmit.



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

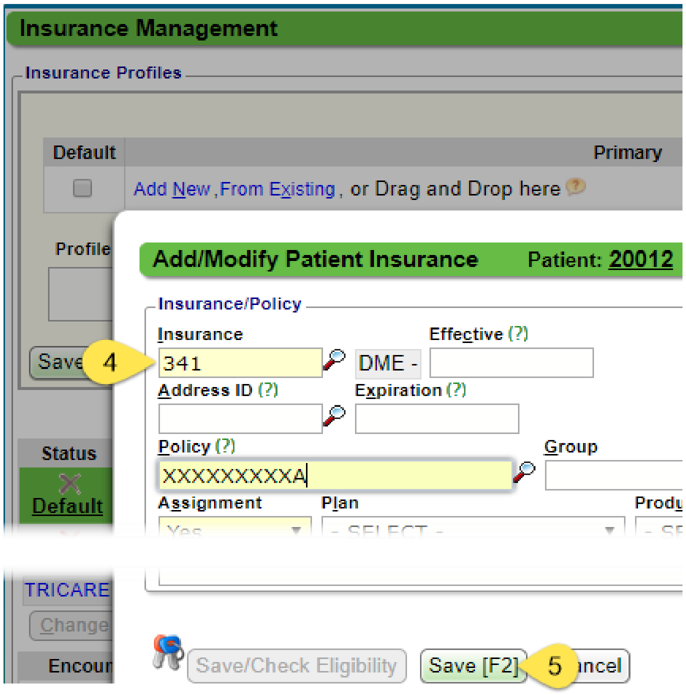


* if the Insurance does not yet exist > Click the Edit link next to the patient information to proceed to the Patient Dashboard, then click 'Insurance Management' to add

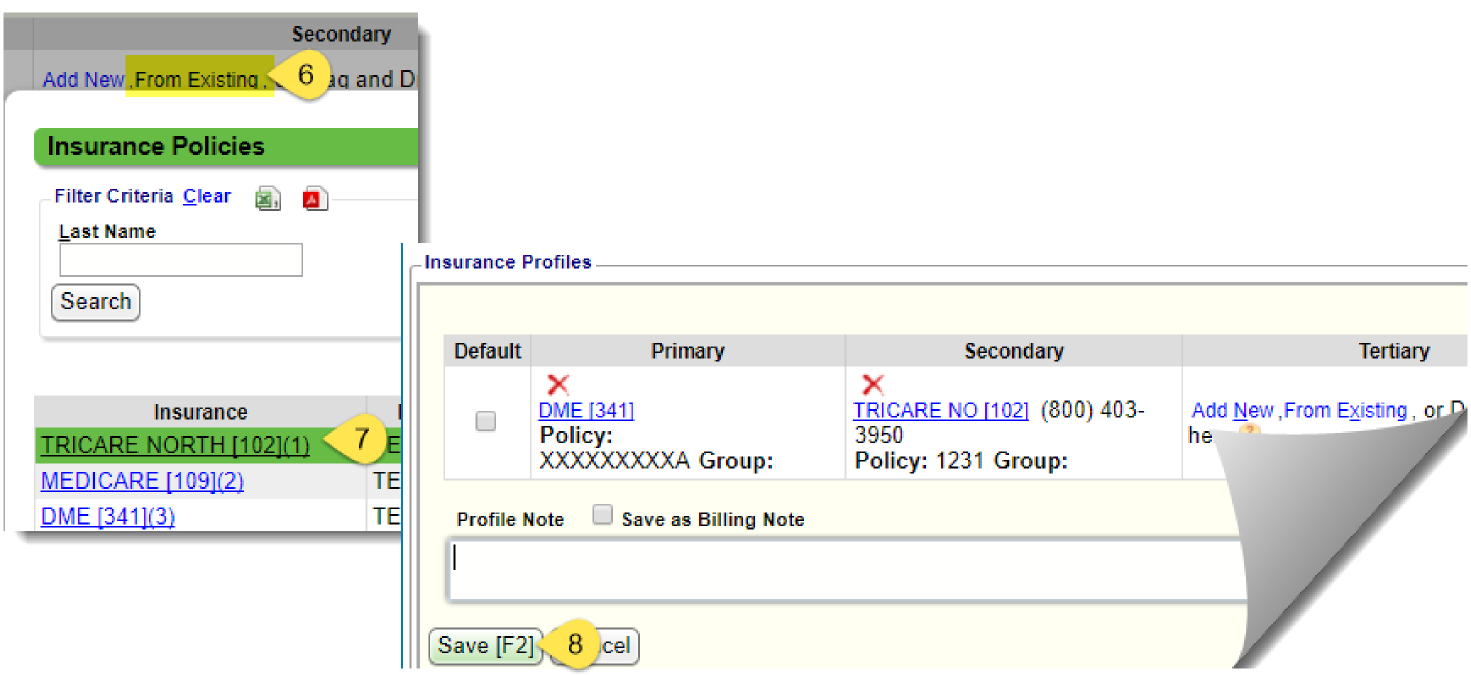
How to add DME to an active Insurance Profile

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

4. Select the DME Insurance Policy



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



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.

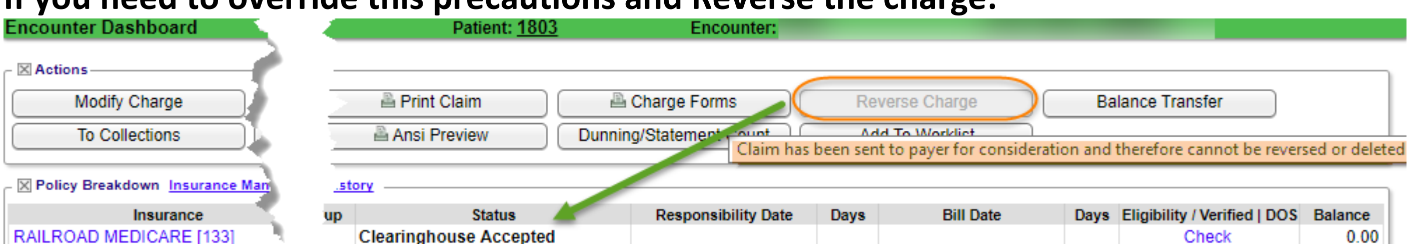
- Is an insurance payment posted and is there a chance the insurance could do a take-back? If so, perhaps the charge should NOT be reversed as you will need to re-post the Insurance to the new charge. You may, instead, add a new corrected claim and the balance for the original Encounter written off.
- 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.

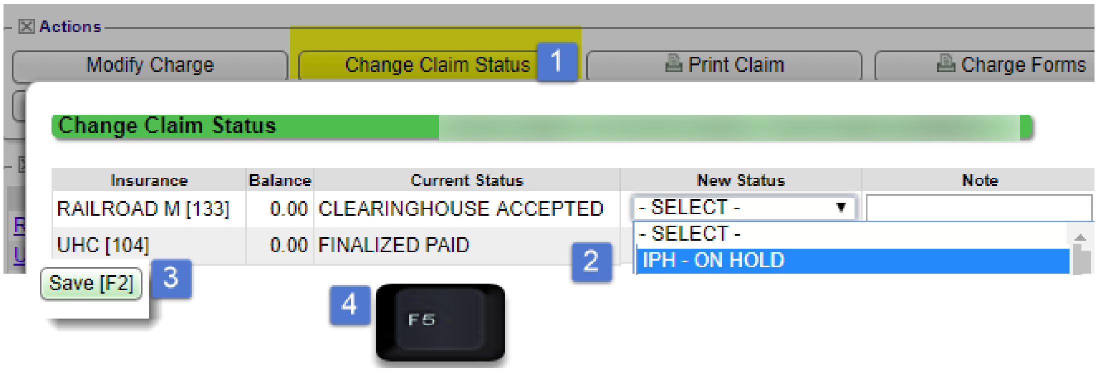
Why can't I Reverse a Charge? The Reverse Charge button is grayed out

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:

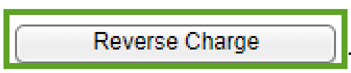


1. Click [Change Claims Status]
2. Toggle the status to something like 'HOLD'
3. [SAVE]
4. Click 'F5' or refresh the screen > The [Reverse Charge] button is now live



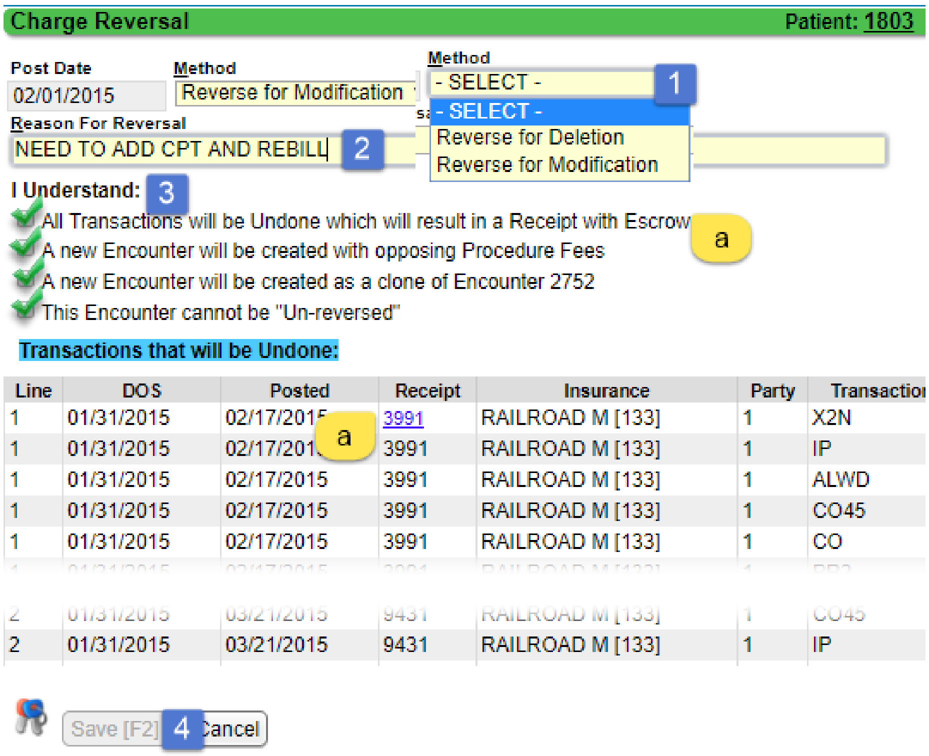
How do I Reverse an Encounter, to Delete or Modify?

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

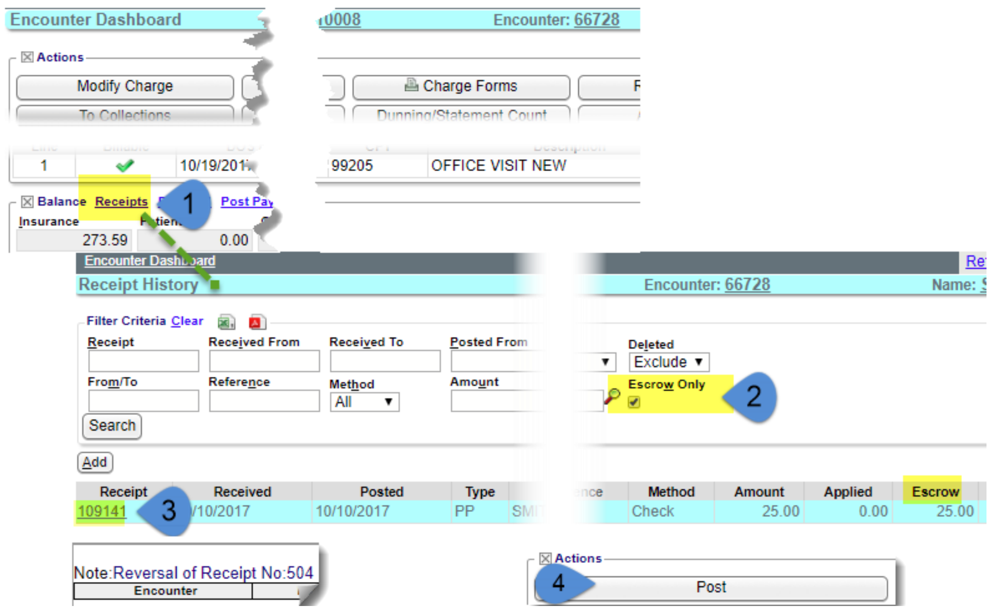
1. Use 'Method' dropdown:
   Reverse for Deletion: Deletes Encounter by creating an equal but opposite Encounter that is not editable and is fully reported in the current accounting period.
   Reverse for Modification: Deletes Encounter by creating an equal but opposite Encounter that is not editable *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
   a. 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.



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 DashboardFilter the Receipts for 'Escrow Only'



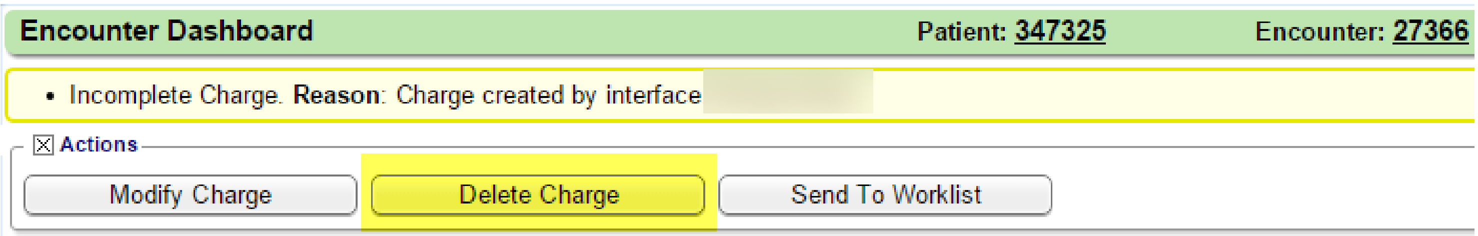
2. Click on the Receipt link that has the Note: 'Reversal of Receipt No. XX' link and the correct dollar amount
3. [Post] the new Receipt

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

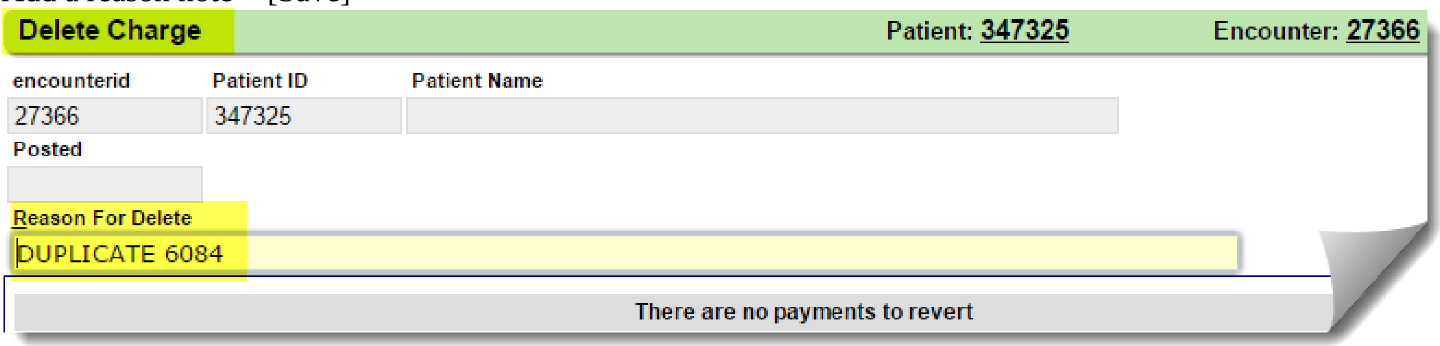
Revered for modification: The appointment is linked to the new encounter
Reversed for Deletion: The appointment is striped and is eligible to be linked on another encounter

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



Add a reason note > [Save]

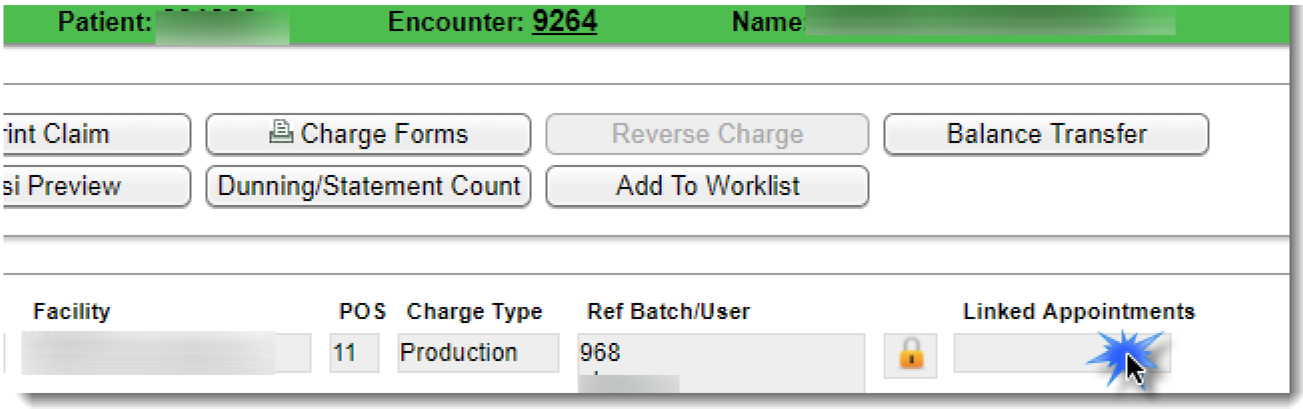


Why should I link appointments to an encounter?

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



How do I link an Appointment to an encounter?

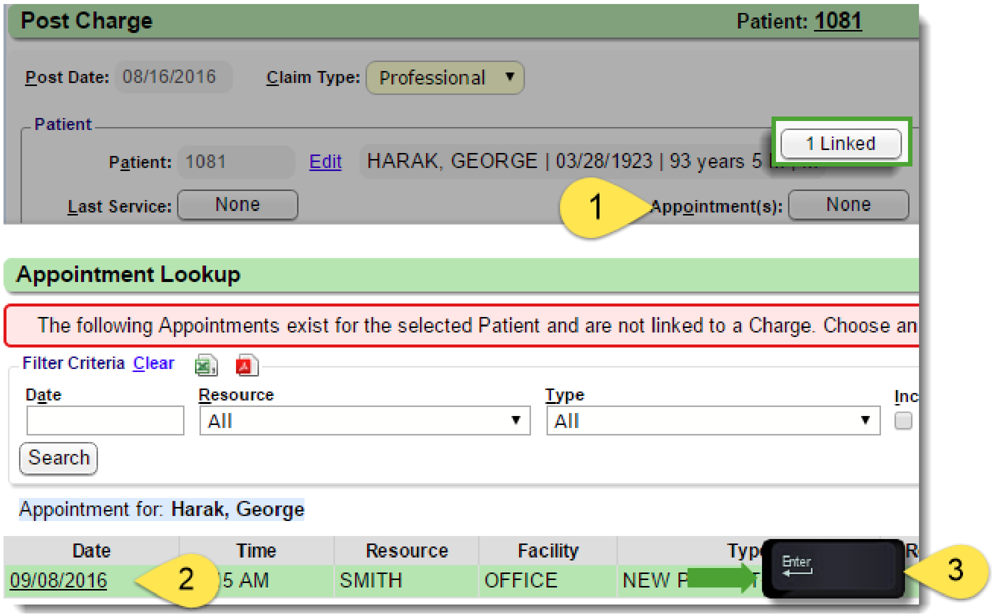
How do I link an Appointment to an encounter?

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,

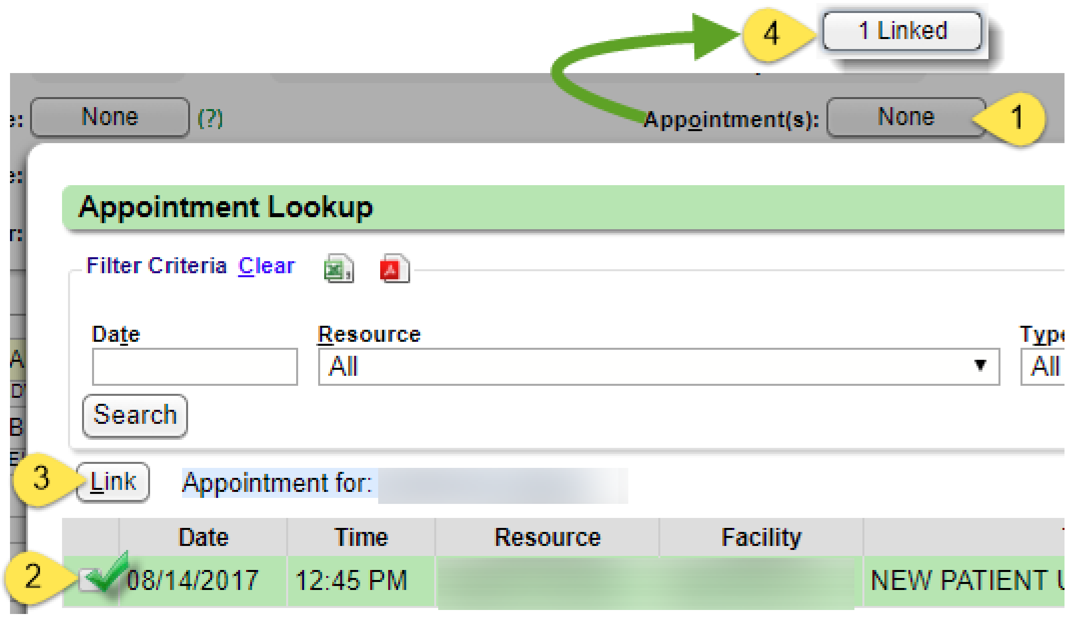
1. If you don't get a popup, Click [None] next to appointment(s)
2. Simply highlight the correct appointment
3. Click [Enter] on your keyboard. The 'Appointments' button updates from None to [1 Linked].

This function ties the appointment to the charge.



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.

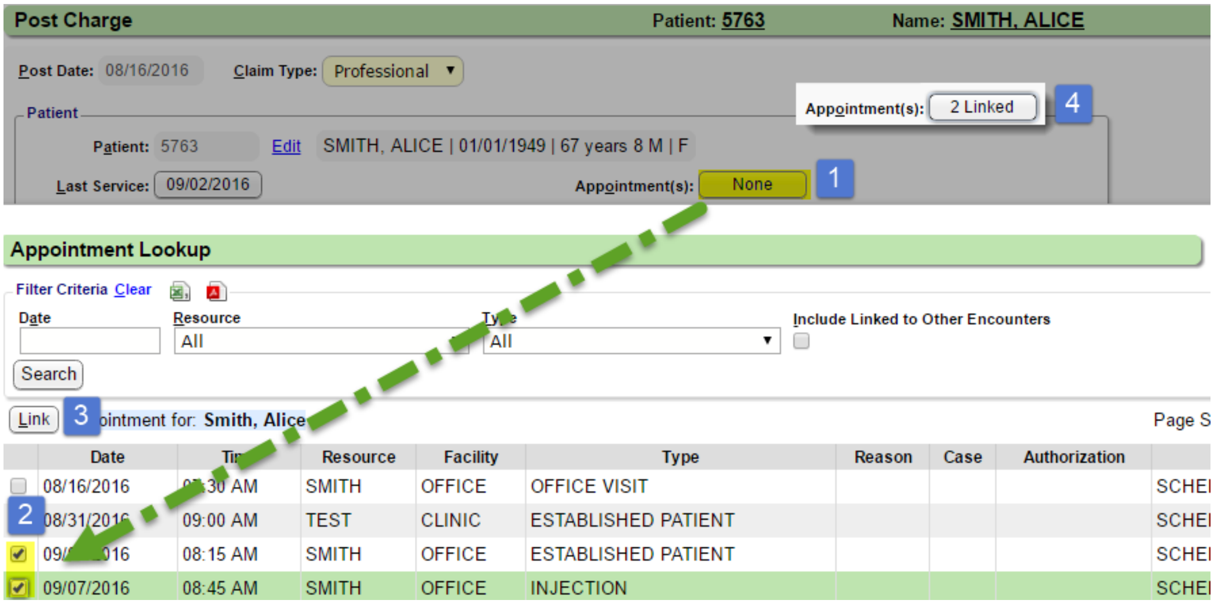
1. Click Appointment(s) [None]
2. In the popup check the box(s) representing the appointment(s) this encounter satisfies
3. Click [Link]
4. The [None] changes to [1Linked]



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

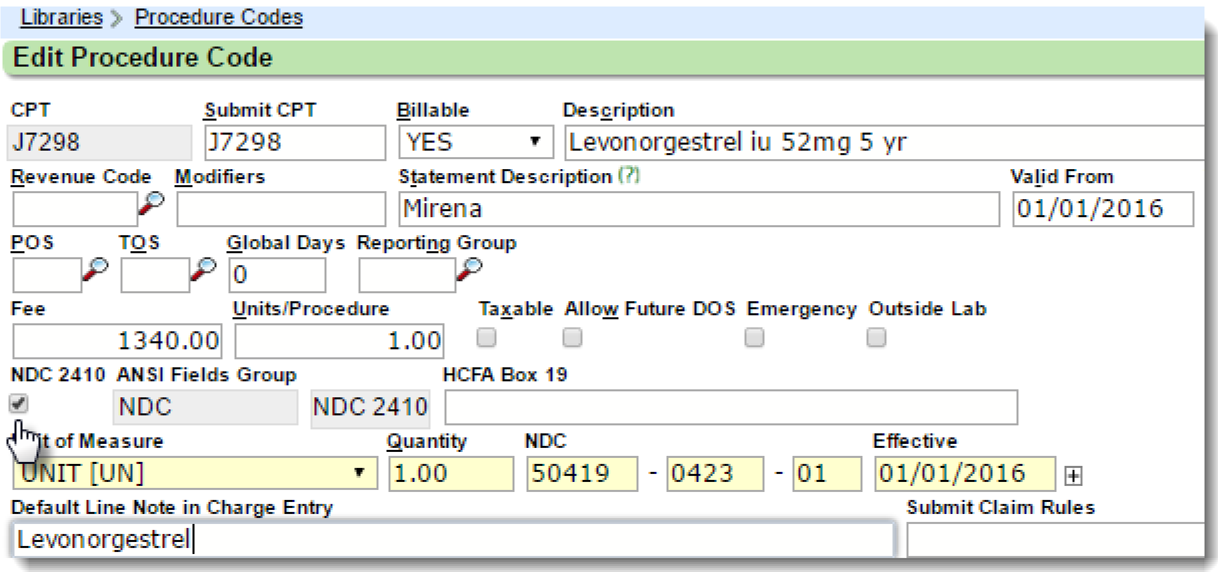


NDC

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

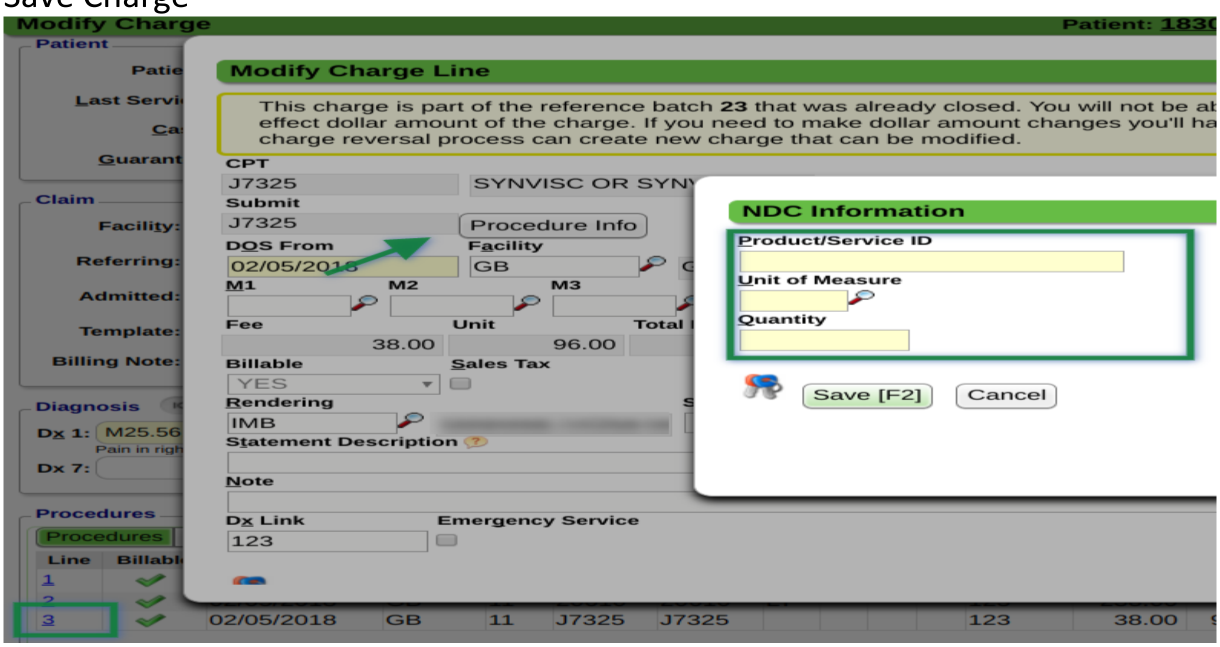
Tip: Add a line note with the description in the 'Default Line Note in Charge Entry' field. For certain Insurances, they will reject the claims if this is missing; however, no Insurance will reject if the line is present.



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:

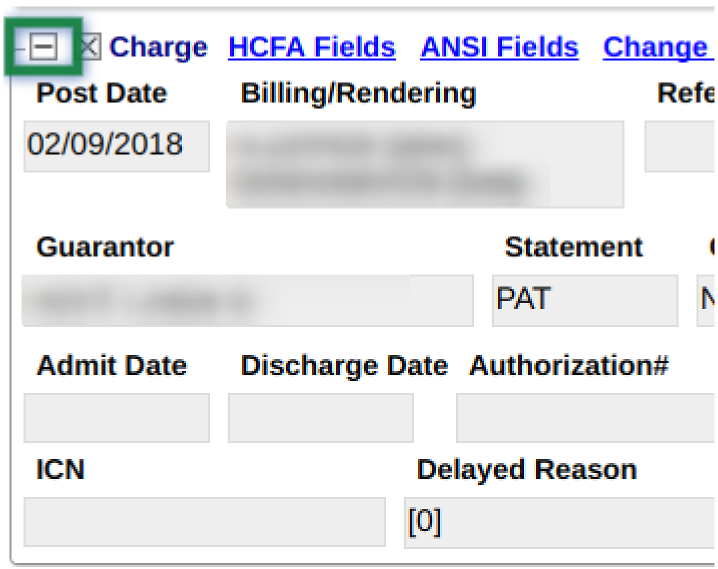
- Click [Modify] on the Encounter Dashboard
- Click the line item > Click [Procedure Info] button > Add NDC > Save
- Save Charge



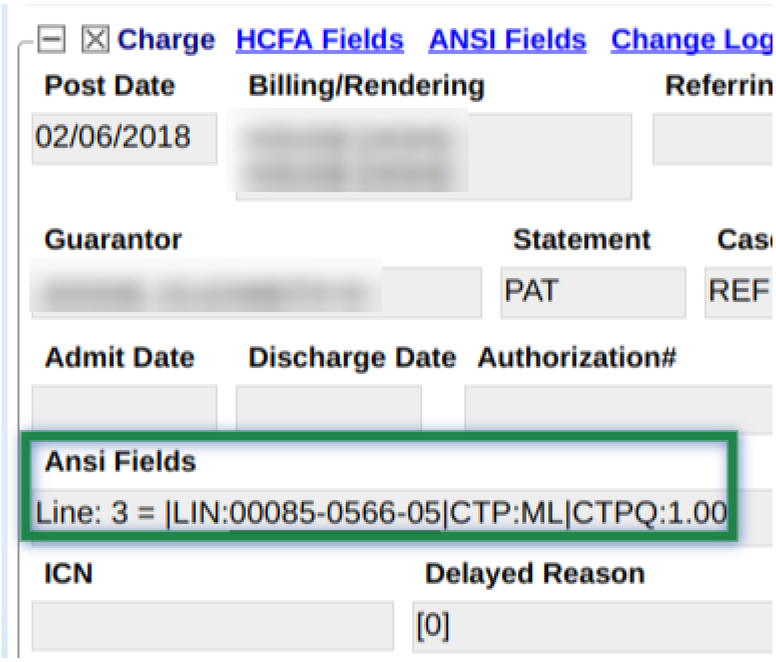
How can I tell if the NDC is missing from the encounter?

Expand the Charge section on the Encounter

- In this example there is no NDC



- In this example there is an NDC

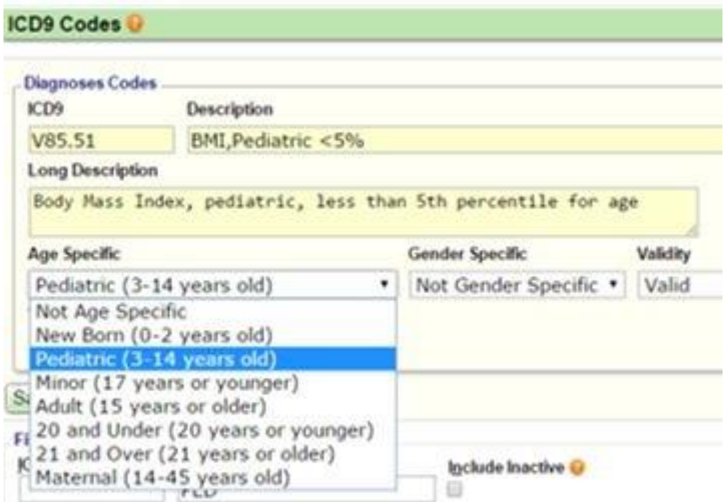

Charge
HCFA Fields
ANSI Fields
Change Log
Post Date
02/06/2018
Billing/Rendering
Guarantor
Statement
PAT
REF
Admit Date
Discharge Date
Authorization#
Ansi Fields
Line: 3 = |LIN:00085-0566-05|CTP:ML|CTPQ:1.00
ICN
Delayed Reason
[0]

Authorizations and Cases

How do I change the Validation Warning:

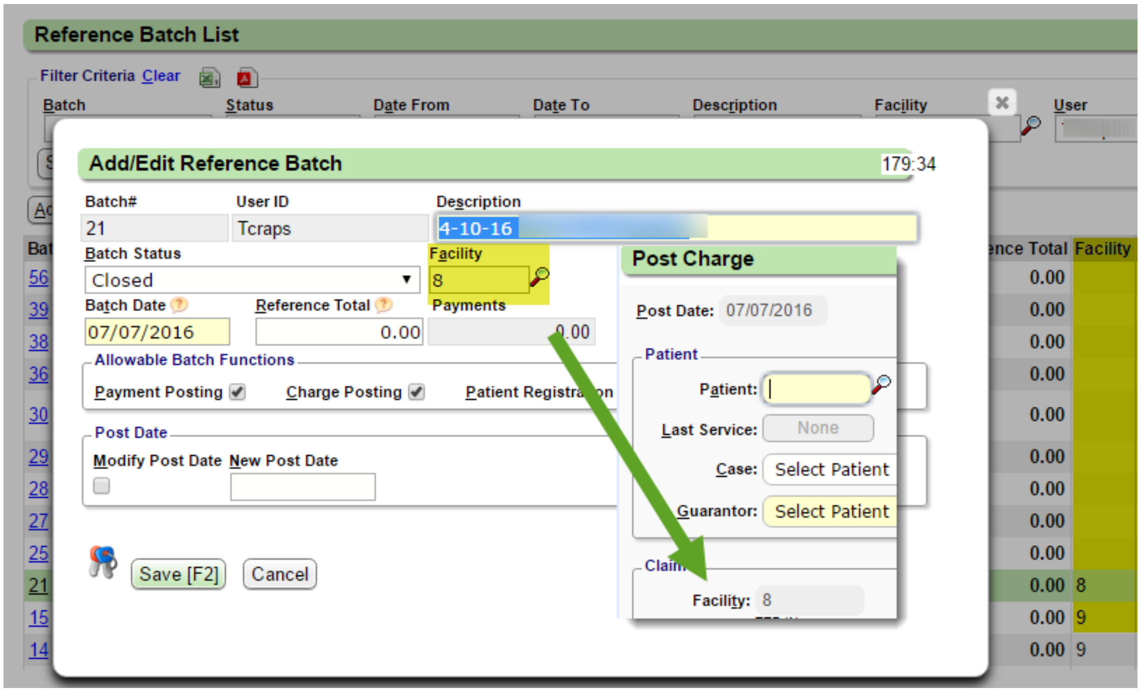
Diagnosis: xxx is not valid for the Patient's age (xx). Patient must be x-x years old

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



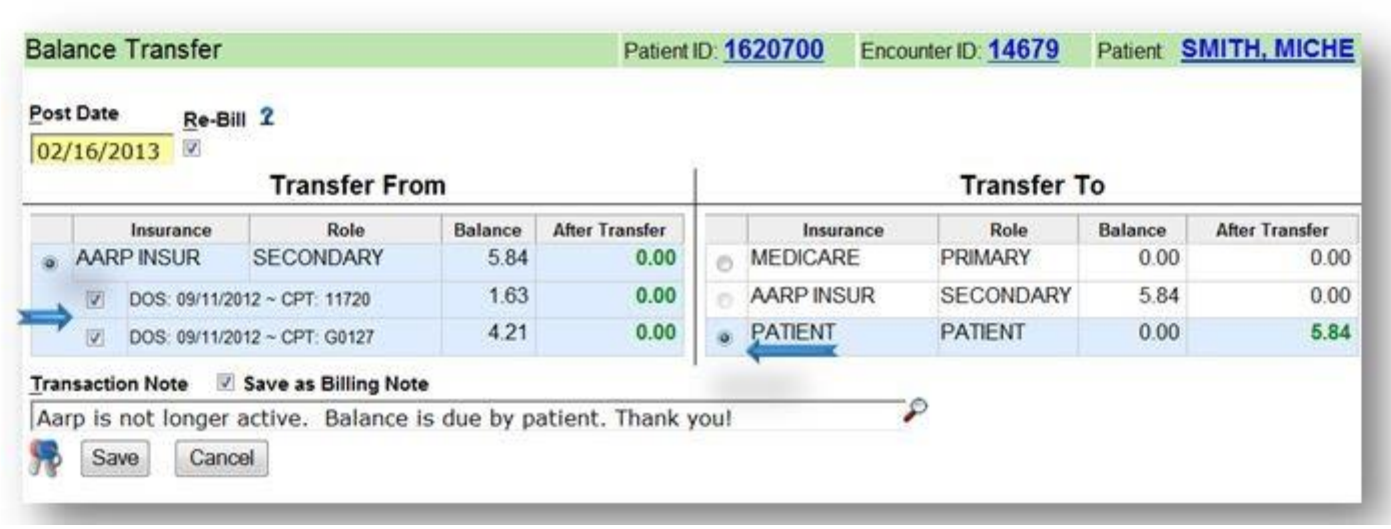
Why is the Facility grayed out during charge entry?

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.



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

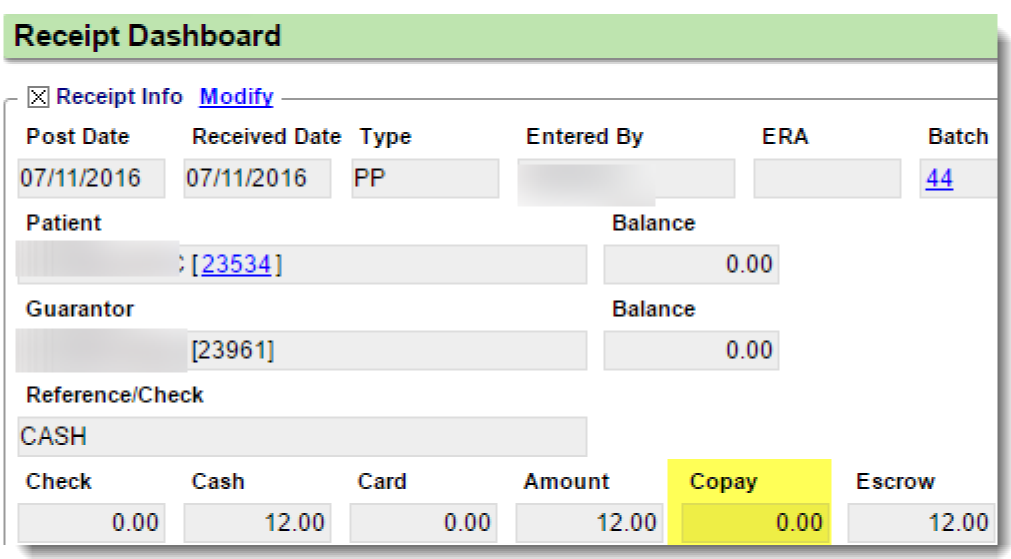
1. On the Encounter Dashboard click [Balance Transfer] > Click in the radio button on the 'Transfer From' side
2. Use the check boxes to de-select any CPT line item(s) that should not be part of the transfer
3. On the 'Transfer To' side, click the radio button to choose where to move the balance
4. The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



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

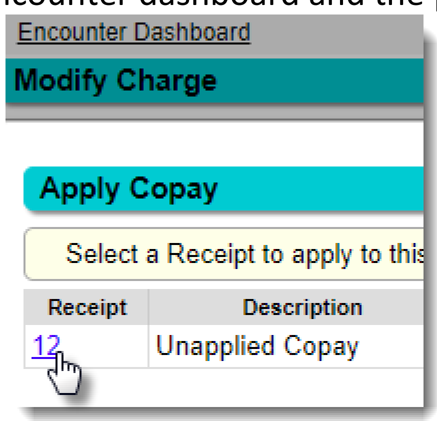


In the above example the Copay field doesn't reflect a copay amount, so there would be no popup.

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

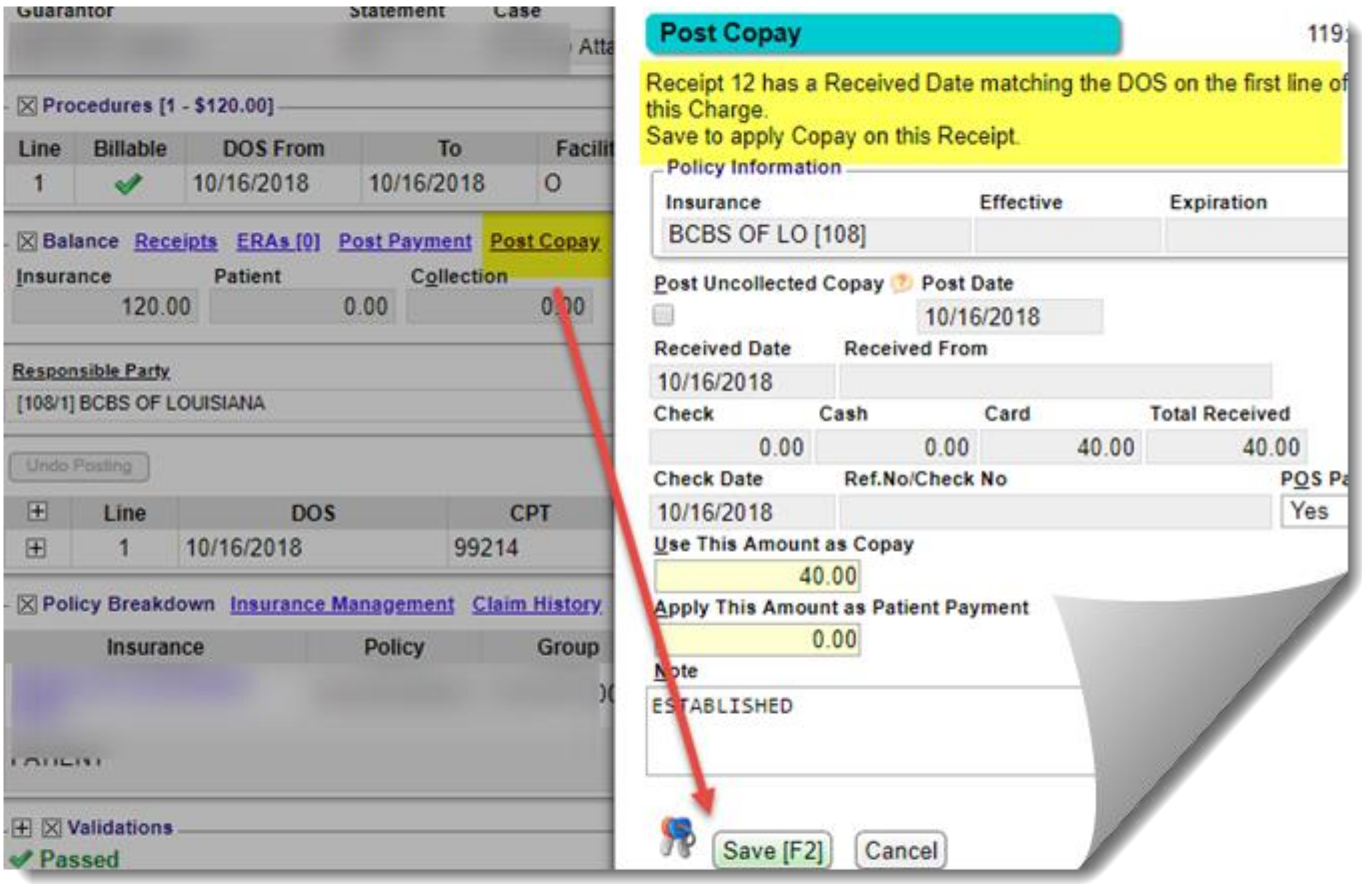
What should I do if I accidentally did not choose to 'Apply Copay' on popup?

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



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.

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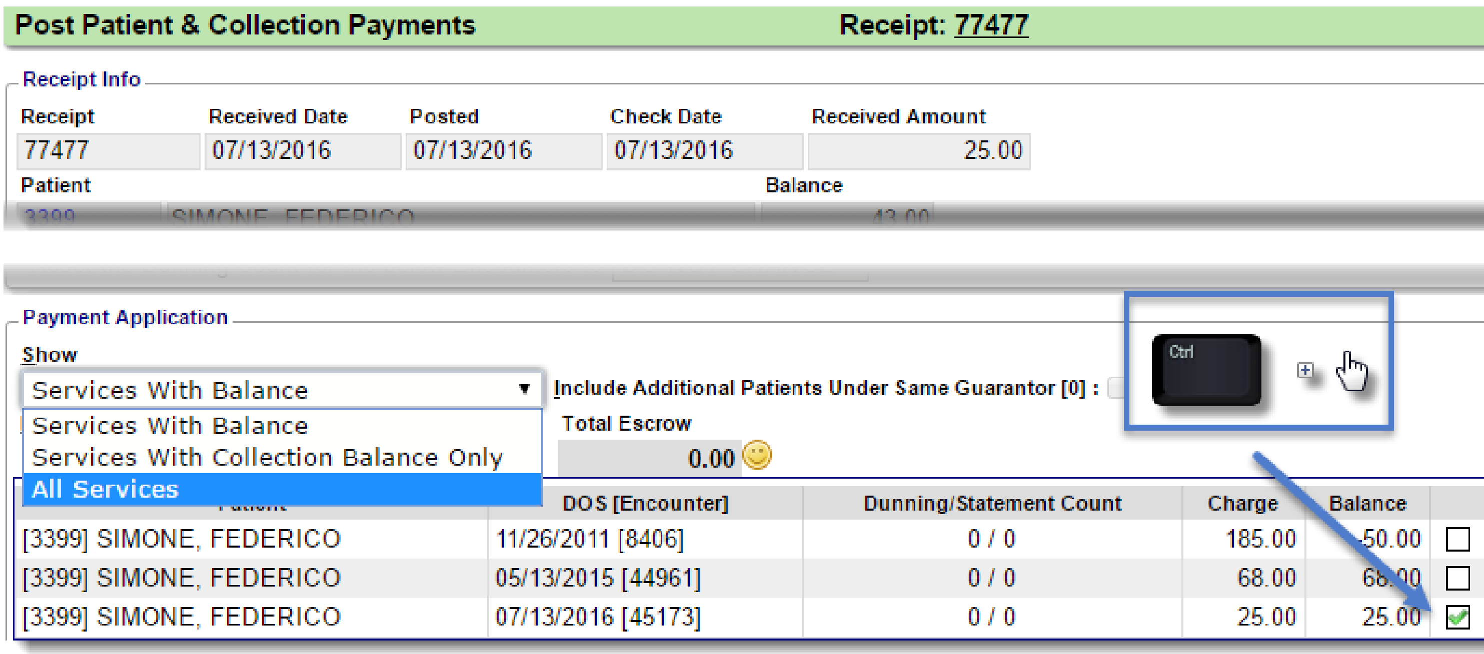
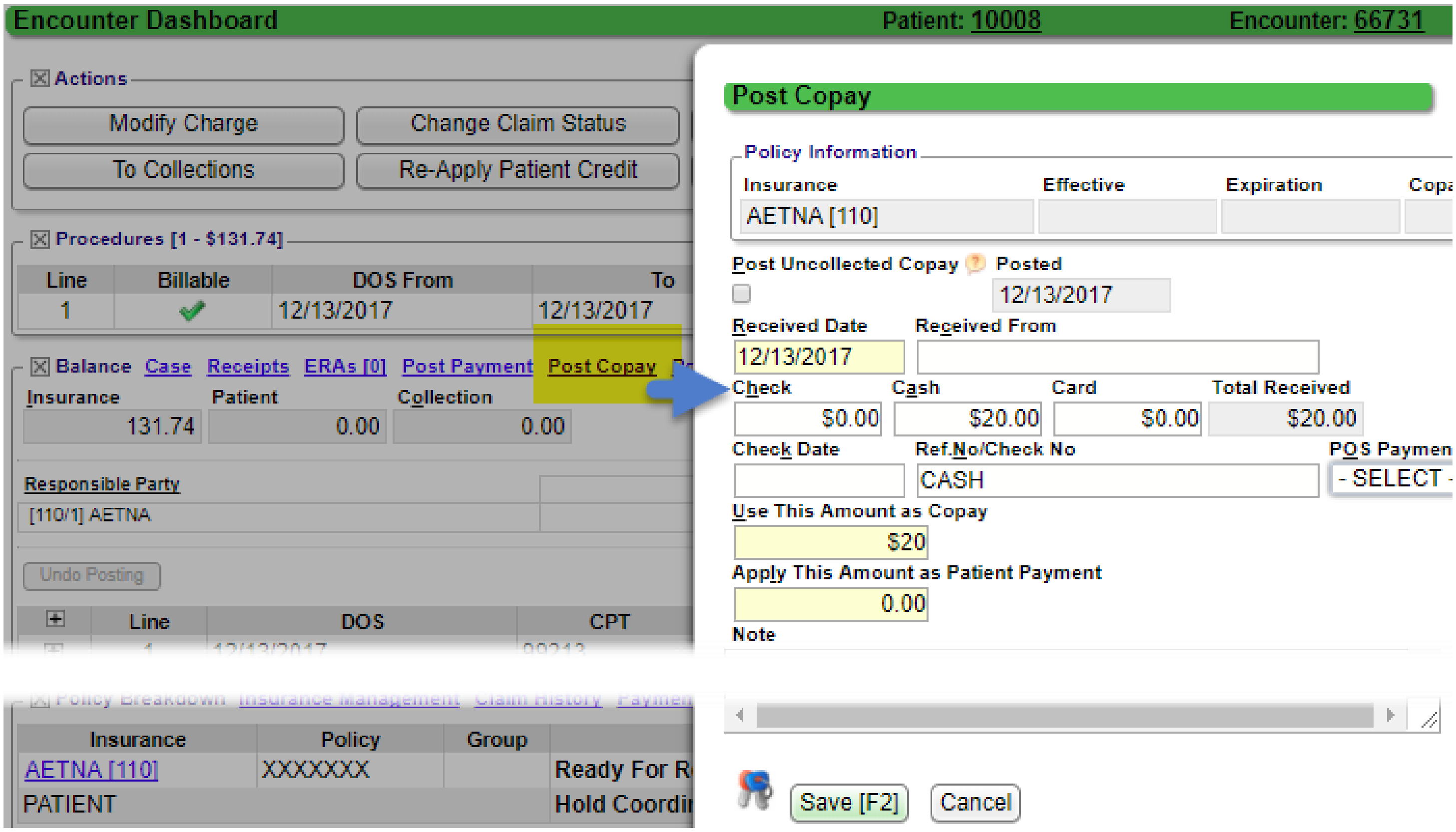


What if I did not have the copay details to post until after the charge is in or we only have an incomplete charge?

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

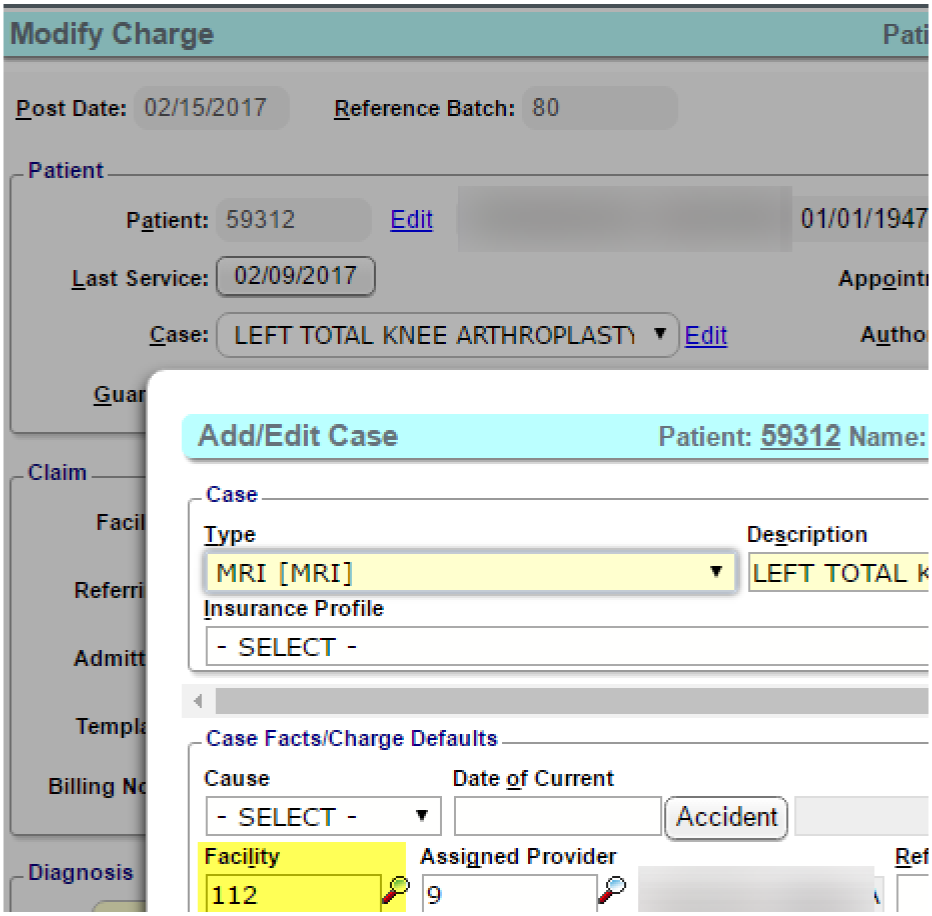
This hyperlink only appears if there is no copay posted to this encounter yet.



Why am I getting this validation warning?

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

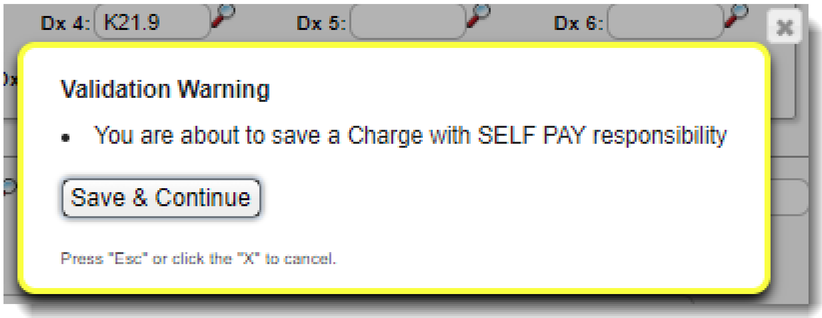
If the case has a facility set on it, and the facility on the new charge is not the same you will get this warning. You should either clear the facility on the Case or correct the facility on the charge.



Self Pay

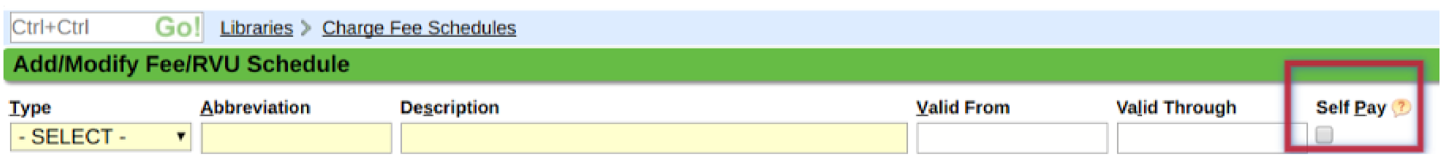
What is the validation warning 'You are about to save a Charge with a Self Pay'

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]

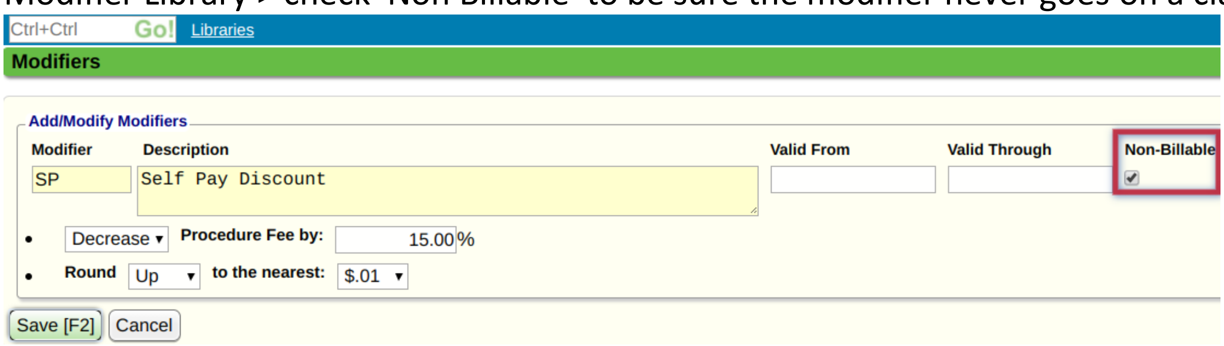


Ways to apply a self pay discount:

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

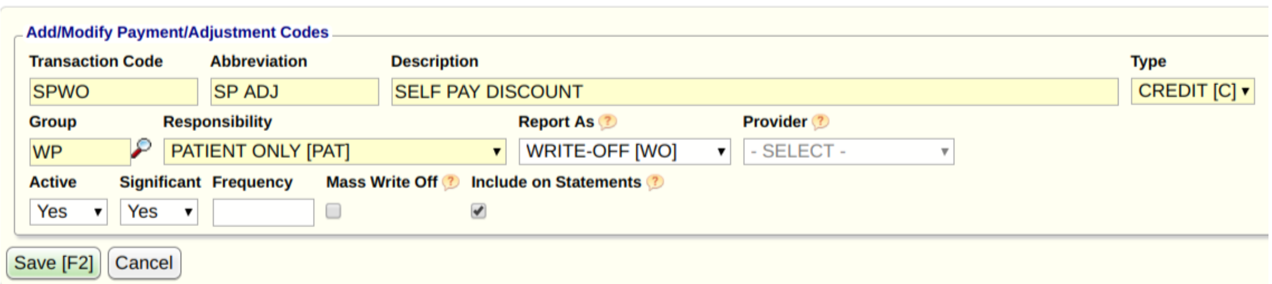


- Custom **modifier** -
  - Modifier Library > check 'Non Billable' to be sure the modifier never goes on a claim



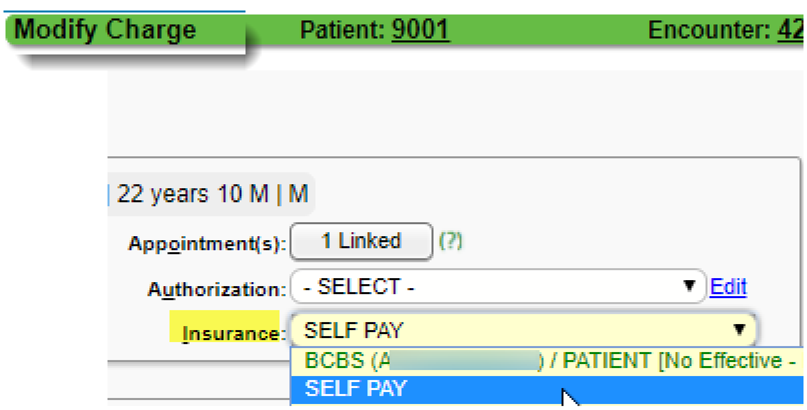
Post Adjustment

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



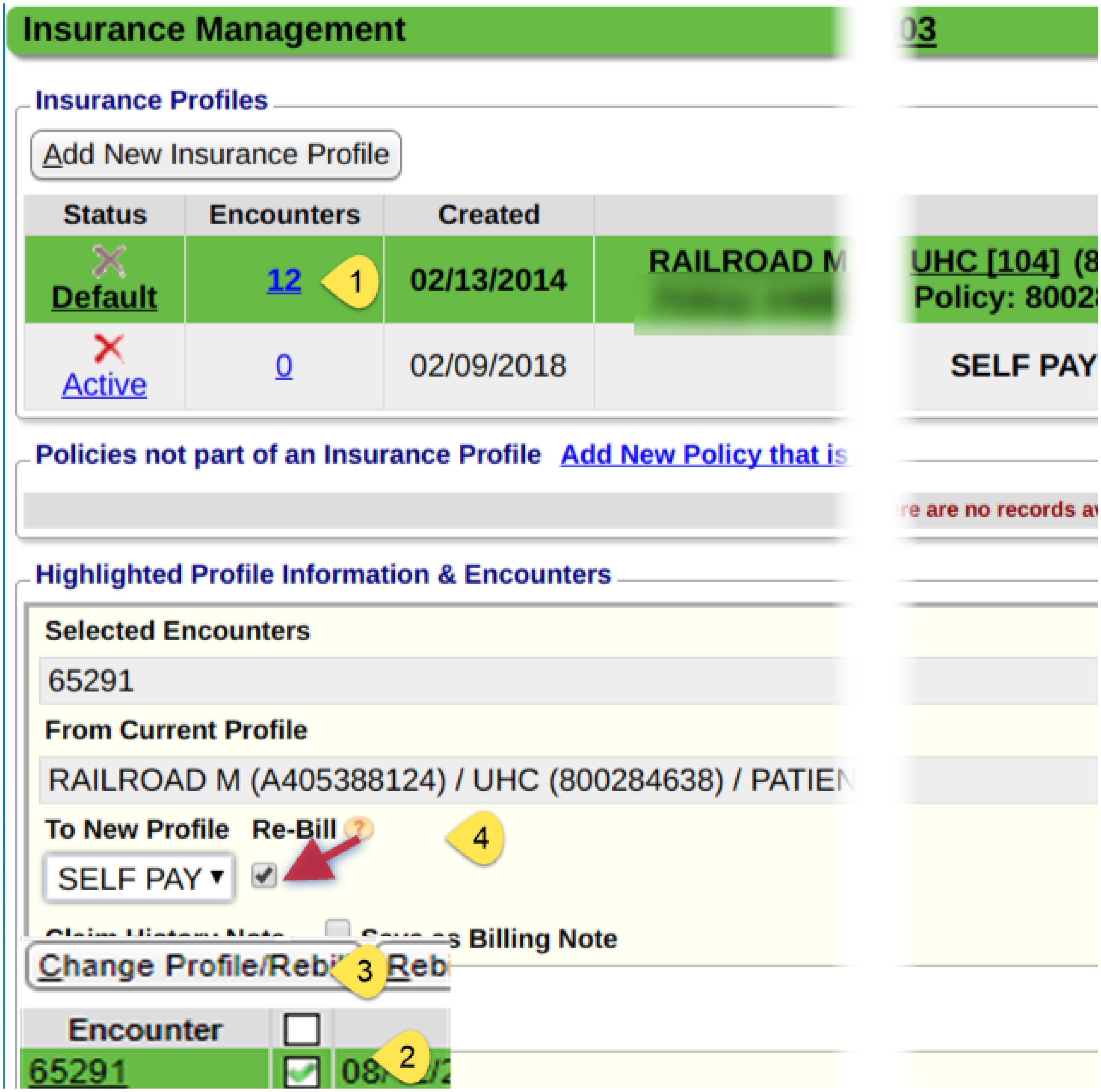
How do I key in charges for dispensed cash pay items, or self pay charges?

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



- After the charge is keyed in, if you have forgotten to toggle to self pay, go to 'Insurance Management'

1. Highlight
2. Checkbox encounter
3. Click [change profile/ rebill]
4. Toggle from insurance to self pay > SAVE * this only works if the full balance is with one insurance



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.