

CATEGORY: CHARGE POSTING ~ SALES TAX

1. Insurance is 'self pay'
2. DX can be MISC
3. If the CPT is setup correctly note 'taxable'
4. You may want to proceed to encounter, as the actual tax is not calculated until we save the charge
5. [Save]
6. [Save & Continue]

The screenshot shows a medical billing software interface with several key elements highlighted by yellow callouts:

- 1:** Insurance dropdown menu set to 'SELF PAY'.
- 2:** Dx 1 dropdown menu set to 'MISC'.
- 3:** Tax dropdown menu set to 'YES'.
- 4:** 'Next Action' dropdown menu with 'Proceed to Encounter' selected.
- 5:** 'Save [F2]' button.
- 6:** 'Save & Continue' button.

A 'Validation Warning' box is visible, containing the following text:

- Appointment(s) exist for DOS 05/11/2018 that have not been
- You are about to save a Charge with SELF PAY responsibility

Below the warning box, a 'New Charge' dropdown menu is open, showing options: 'New Charge New Patient', 'New Charge Same Patient', 'Proceed to Patient', 'Proceed to Encounter', and 'New Charge New Patient'.

Tax is calculated using % setup on 'Tax' CPT code and is added when the charge is saved

To post the payment at this time click 'Post Copy' - be sure the copy amount is zero and the apply this amount to patient payment is keyed in

The screenshot shows the 'Post Copy' dialog box with the following fields and values:

- Post Uncollected Copy:** Posted
- Received Date:** 05/11/2018
- Received From:** [Empty]
- Check:** \$79.50
- Cash:** \$0.00
- Card:** \$0.00
- Total Received:** \$79.50
- Check Date:** [Empty]
- Ref.No/Check No:** XXX
- POS:** - SI
- Use This Amount as Copy:** \$0.00
- Apply This Amount as Patient Payment:** \$79.50
- Note:** for xxx

Buttons at the bottom include 'Save [F2]' and 'Cancel'.