Post a New Charge (Manual Charge Posting)

Access the 'Charges Dashboard' by clicking 'Charges' on the sidebar menu or to go *directly* to the entry of a new charge, type 'NC' in the 'Go' box and [Enter].   For more information see our Help Center: Videos - *Charge Entry* and *Advanced Charge Entry* & PDF - *Reference Batch, Charge Posting, Claims Batch Creation*

Reference Batch: 2907 CHARGE ENTRY

Users must be attached to a Reference Batch.

Charges Dashboard

☒ Post Custom Encounter Query

Post Charge

Click to create a new 'Charge'- only necessary if you click 'Charges' in the sidebar

You may also add a charge from the Patient or Appointment

Patient Dashboard

☐ ☒ Demographics Edit [Ctrl-F2] For

   Patient Name

From the Patient Dashboard

☐ ☒ Balance Post Charge Cases [0]

Insurance   Patient

Falconone Test [9562990] | 01/02/1997 | 19 years | M ~ E

Phone: H: (216) 333-4444 C: (440) 555-6666 W: (330) 444-555

Insurance: [1]-AETNA [2]-GHI (DEFAULT) [02/01/2014 - No Expirati

Date: 12/15/2016   Time: 08:45 AM (15 min)

Instructions:

Status: SCHEDULED [S]   Check In   Can

New

From the Patient's Appointment

Edit Appointment   Patient Dashboard   En

Print Ticket   Edit Demographics   Enter Charge

Print Schedule   Insurance Management   Service History

Post Charge Screen

Enter information and *tab* through fields. We section this page off to represent, Patient (1), Claim (2), Diagnosis (3), Procedure (4), Copay, other function (5), Save(6)

(1) Patient
- ○ 'Edit' link by the patient allows you to view/modify demographics/Insurance profile

* for Authorization or Case information please refer to the Help Center

(2) Claim
add claim level details here

(3) Diagnosis
(A) G.E.M.S. equivalency lookup
- ○ Up to 12 DX per claim
- ○ DX link per line - use numbers/letters with no comma- example this CPT code is linked to DX 1,9 and 10 - 19A

(4) Procedure
As Procedure lines are entered, they drop to the box beneath (A). The cursor will return to Procedure Line after a line is completed, allowing for fast entry of multiple lines (B). When finished click [F2] or [Save].

Copay
- If you are manually keying in the receipt at the same time as you enter the charge > Click [Copay] on line 1
- If Copay has been collected at check in > you are presented with a popup >

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?

Click [Modify] from the Encounter dashboard and the popup will present again.

OR

Click 'Post Copay' hyperlink on the encounter, you will be presented a popup that looks like the screenshot.

Click [SAVE].

- This link only appears if no Copay has been posted to this encounter

(5) (6) [Save]

A- 'Encounter Claims status' defaults to 'Ready for Submission' at the time of charge entry. There are other options available, please consult your trainer or support for more information on the use of this feature.

B- establish what page to land on upon saving

Charges are saved as an 'Encounter'.
Multiple dates of service can exist on one Encounter

How do I copy a previous Encounter (charge)?

Click [Last Service] to access 'Service History' and Copy options, including: Copy Dx Only, Claim-Level Only or Full Charge. This allows the user to create a new charge, using part or all of an existing charge.
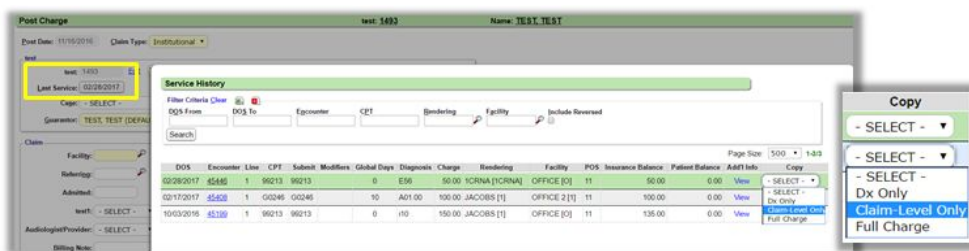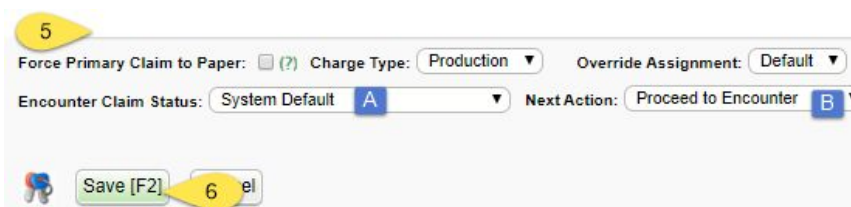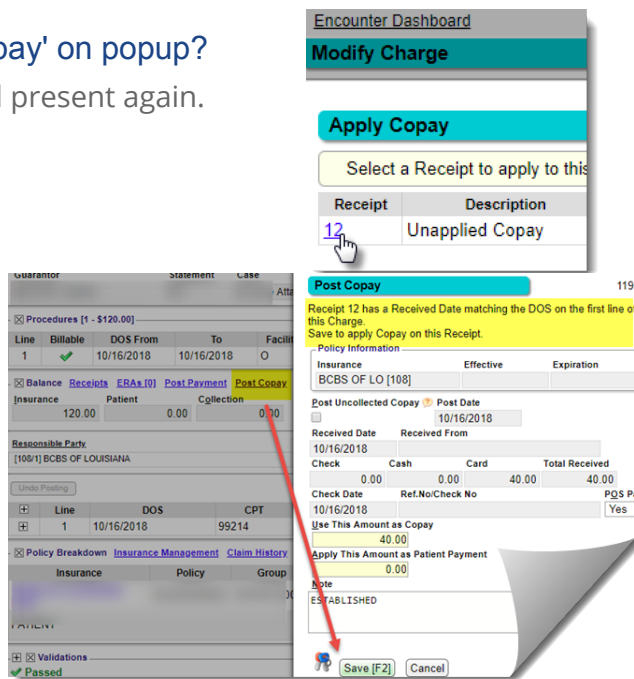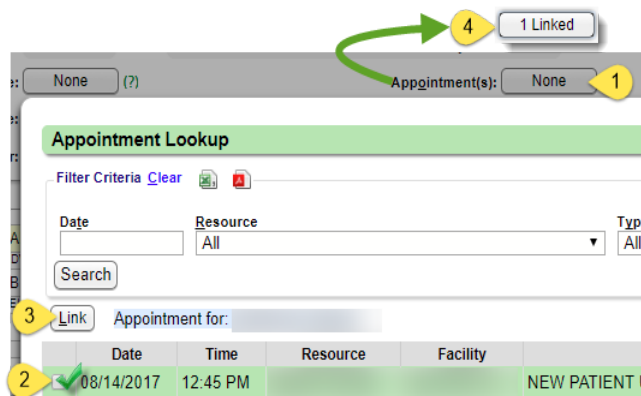
How do I link an Appointment to an Encounter?

This function ties the appointment to the charge. If a matching appointment exists, you're presented with this popup. 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. Check the box next to appointment
3. Click [Link]
4. The button changes from NONE to 1 Linked

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


How do I delete a CPT from an Encounter

In the Procedure section, on the line item, click the Trash Can Icon > Click [Yes]
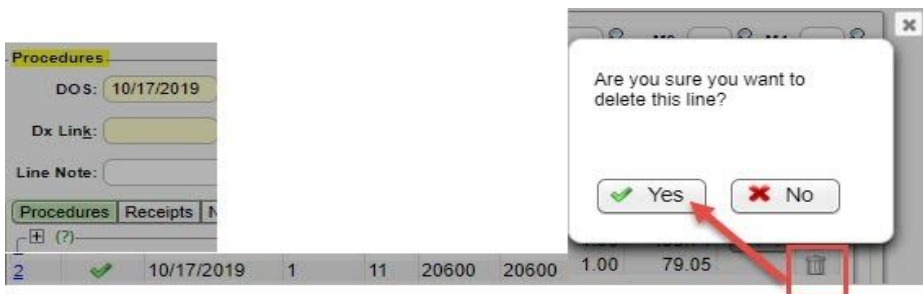
How do I link multiple appointments to one encounter?

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 appointments that are linked
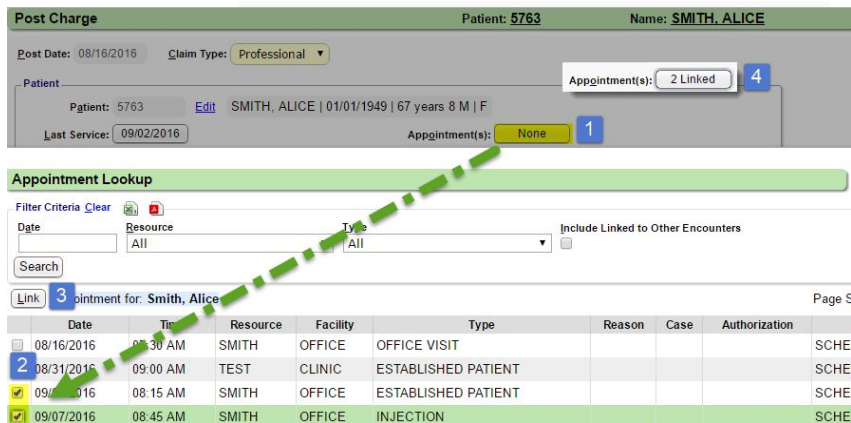
How do I reorder the CPT lines on an Encounter?

Use the arrows in the Procedure area to move the CPT lines on the Modify Charge Screen
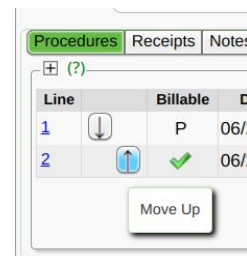
How do I save an Encounter (charge) as Incomplete?

A user can force an encounter to stay in the Incomplete bucket to close (complete) at a future time from the Modify Encounter. If the user does not close this type of encounter during the accounting period it appears in a worklist on *Period analysis and Closing*
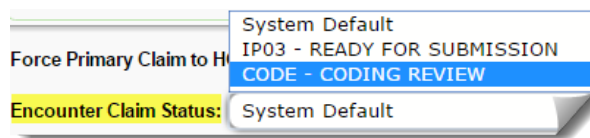
From the Modify Encounter page:
1. 'Charge Type' drop-down 'Incomplete'
2. [Save]
3. In the popup state *why* you are taking this action in the 'Incomplete Reason'
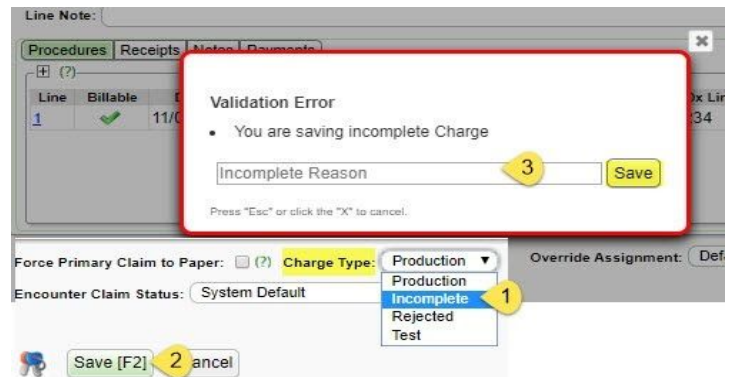
You may also use a 'custom' 'Encounter Status'

Available in Charge Entry or for the Mass Write-off function > To add and manage 'Statuses' > click **'Libraries'** > **[Claim Status]**

1. [Add]
2. Create Status
3. use checkbox to 'make available in charge entry'
4. [Save]
- Any status other than 'System/Ready for Submission' holds the claim from being gathered in a claims batch

Post Charge Fields Defined

	FIELD	DESCRIPTION
1	Patient	Identify who received the service, search by ID, or name
2	Edit area	Auto-populates after Patient entered, Edit link allows updates
3	Last Service	IF any services show the most recent – click for full details
4	Appointments	Allows user to link charge to appointment
5	Case	Often used for Workman's Comp, Pregnancy, PT etc.
6	Authorization	Select Add Manually if there is no Case
7	Guarantor	Responsible party for the encounter
8	Insurance	Insurance Profile for this claim
9	Facility	Facility where the service was performed

10	Place Of Service	Where the service took place
11	Rendering	Provider/Entity who performed the service
12	Billing	Who is Billing for the service, defaults to the same provider as Rendering
13	Referring	Provider who referred the service
14	Supervising	Provider who is supervising
15	Statement	Type of Statement, default to system setting
16	Admitted	Date patient is admitted, if applicable
17	Discharged	Date patient is discharged, if applicable
18	ANSI Field Group	Provide additional information in reference to a specific service
19	Accident	Show/enter Accident details
20	Template	Can be set in Libraries
21	Line Note	Claim level billing note
22	ICD toggle	Toggle to ICD9 for DOS for before 10/1/15, defaults to ICD10
23	DX 1-12	Primary DX and all following
24	DOS	Date service was rendered
25	Facility	Auto-populates based on Facility entered above
26	POS	Auto-populates based on Place of Service entered above
27	M1-4	Modifier
28	DX Link	Pointer(s) to Diagnosis field(s)
29	Billable	Y - Bill all parties on insurance profile in the order specified N - Don't bill anyone P- Bill the Guarantor for the Patient, but *not* the insurance
30	Fee	Auto-populates based on fee associated with the CPT
31	Unit	Default value is 1, change only if applicable
32	Total	Calculated based on the values in the Fee and Unit fields
33	Line Note	Free text a billing note if applicable
34	Line	Summation of the Line, click to make corrections
35	Copay/Apply	Click to enter copay - apply indicates a copay is posted
36	Force Primary ..	Check box to override Insurance library settings
37	Type	Defaults to Production, Incomplete is also available
38	Encounter claims..	Claim status of the encounter
39	Next action	Choose the next page
40	Save	Save the encounter