

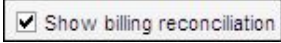
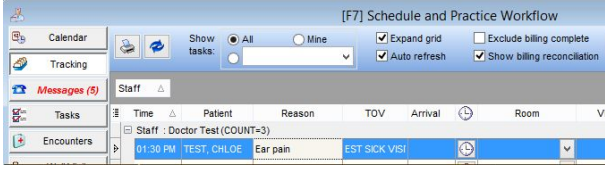

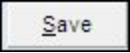

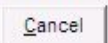











Entering Charges/Post Superbill

Post a Superbill (from Tracking Window)

1. Click on .
 2. Select  on the left hand side.
 3. Click the check box next to .
 4. Select a patient to post charges for.

 5. Click  above the Unposted Charges to post all pending superbill charges.
 6. The **Add/Edit Charges** window will open.
 7. Verify the information for claim.
 8. Click  in bottom right corner when done.
 9. After verifying charges click  or  to exit.
- Note: Once you post the charges, clicking Cancel will not undo the posting of charges.*
10. To post selected charges or split charges into 2 separate claims, highlight the desired transactions to post together and click **Post Selected**.

Post a Superbill (from Account)

1. Click on .
2. Search for patient using  patient lookup.
3. Select  on the left.
4. Click  to post all pending superbill charges.
5. The **Add/Edit Charges** window will open.
6. Click on  when done.

Unposted Charges					
 Auto-Post		 Post All		 Post Selected  Edit	
Date	Prov	CPT-Mod	Description	DX	Description
10/21/2015		99172	OCULAR FU	V20.2	ROUTINE INFA
10/21/2015		85018	HEMOGLOBI	V20.2	ROUTINE INFA
10/21/2015		92552	PURE TONE	V20.2	ROUTINE INFA
10/21/2015		736102		V20.2	ROUTINE INFA

11. The **Add/Edit Charges** window will open.





12. After verifying charges click  or

 to exit.






Note: Once you post the charges, clicking Cancel will not undo the posting of charges.

Entering Charges/Post Paper Superbill

Post a Paper Superbill (from Tracking Window)




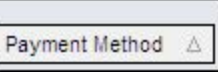

- Click on .
- Select  Tracking on the left.
- Click the check box next to ☒ Show billing reconciliation.
- Select a patient to post charges for.
- Click on  Claim to post charges.
- The **Add/Edit Charges** window will open.
- Click  when done.

Post a Paper Superbill (from Account)






- Click on .
- Search for patient using  patient lookup.
- Select  Charges on the left.
- Click on  Claim to post charges.
- The **Add/Edit Charges** window will open.
- Click  when done.

Closing the Day & Sending Claims



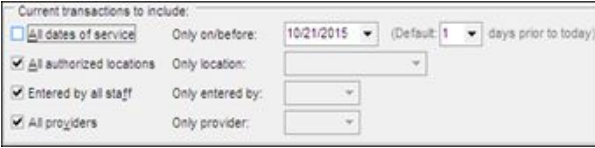
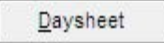
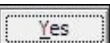
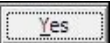
Balance Money

1. Click on  .
2. Click on  Current Receipts .
3. Filter by dragging up staff and payment method.
 
4. Reconcile all money collected by
Payment Method  .




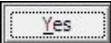
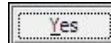
Queue Claims

1. Click on  .
2. Select  Claims + A/R .
3. Select a Stage from the dropdown.
Stage:  Unsent (not transmitted or printed) ▼
4. Click on  to select all Unsent claims.
5. Click on  to queue claims to the Transmit Queue.

Processing the Daysheet

1. Select the  Claims + A/R tab.
2. Click on  button.
3. Carefully select the Current Transactions to include these:

4. Click on  .
5. Confirm  , you updated the Transmittal Queue.
6. Click  to close the report.


Sending Claims

1. Click on  .
2. Select  Transmit Queue .
3. Click on the  button.
4. Confirm  to Create Claim files.
5. Confirm  to Transmit Now.

Note: If you have Instamed as your clearinghouse, click No when asked to Transmit Now.



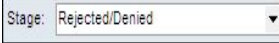


Bringing in CH Reports

Fetching and Processing CH Reports

1. Click on .
2. Select  Claims + A/R.
3. Click .
4. Confirm **Yes** to fetch payer report.

5. Click .
6. Confirm **Yes** to process payer reports.


Managing Rejections


1. Click on .
2. Select  Claims + A/R.
3. From the drop down box select the stage.

4. Select  Status history radio button.
5. Click the  to the left of the claim for rejection details.

Posting Payments

Posting an Insurance Bulk Payment


1. Click on **Activities** in the top Menu bar.

2. Select **Post Bulk Payments**.



Patient Directory F5
Maintain Vaccine Inventory
Review Records in Queue
Review Transmittal Log
Contact Manager
Create General Letters
Internet/PDF Resources
Patient Message eXchange
Administrative Documents
Post Bulk Payments Shift+F12
Capitation Payment: Single Entry
Capitation Payment: Distributed Entries

3. The **Add Payments and Adjustment** window will open.

4. Search for a patient  using the **Patient Lookup** or search by claim number.

Quick pick claim #:

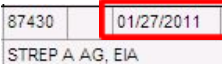
5. Select the posting **Date** and **Pay method**.

6. If applicable enter **Check/Ref #** and **Memo**.



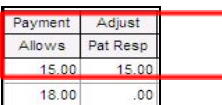
Date: 12/19/2012
Pay method: CK CHECK
Check/Ref # M Ck
Memo:
Amount: .00 Pay in Full Allocate

7. Locate when the date of service payment is for.



87430 **01/27/2011**
STREP A AG, EIA

8. Enter the allowed amount into the **Allows** field. Enter payment in the **Payment** field. Any necessary **Adjust** or **Pat Resp** should be entered as well.



Payment	Adjust
Allows	Pat Resp
15.00	15.00
18.00	.00

9. To post payments and exit select **Save+Close**. To continue posting select **Save+New**. If you don't want to save changes, click **Cancel**.

Posting an Insurance Payment from Patient Account

1. Click on **Accnt**.

2. Search for a patient  using the **Patient Lookup**.

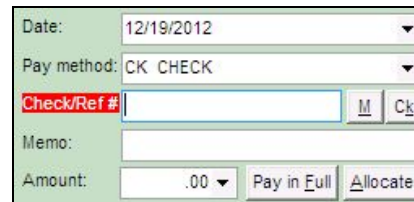
3. Click on **Payments**.

4. Click **Payment**.

5. The **Add Payments and Adjustment** window will open.

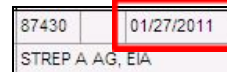
6. Select the **Payment Date** and **Payment method**.

7. If applicable enter **Check/Ref #** and **Memo**.



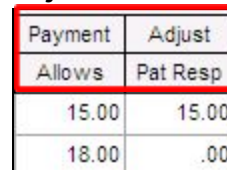
Date: 12/19/2012
Pay method: CK CHECK
Check/Ref # M Ck
Memo:
Amount: .00 Pay in Full Allocate

8. Locate when the date of service payment is for.



87430 **01/27/2011**
STREP A AG, EIA

9. Enter payment in the **Payment** field. Any necessary **Adjust** or **Pat Resp** should be entered as well.




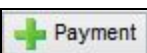

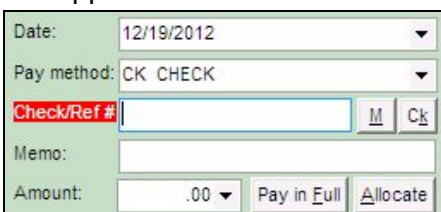
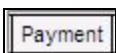
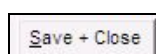
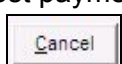


Payment	Adjust
Allows	Pat Resp
15.00	15.00
18.00	.00





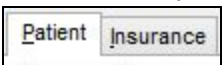
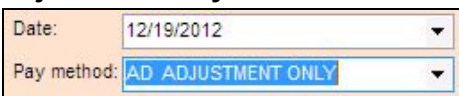


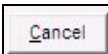
10. To post payments and exit, select **Save + Close** or select **Cancel**.

Posting Payments

Posting a Patient Payment




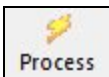
- Click on .
- Search for a patient  using the **Patient Lookup**.
- Click on .
- Click .
- The **Add Payments and Adjustment** window will open.
- Make sure you are on the **Patient** tab.

- Select the **Payment Date** and **Payment method**.
- If applicable enter **Check/Ref #** and **Memo**.

- Locate when the date of service payment is for.
- Enter Payment amount in the **Payment** field.

- To post payments and exit select  or select .

Posting an Adjustment

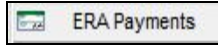
- Click on .
- Search for a patient  using the **Patient Lookup**.
- Click on .
- Click .
- The **Add Payments and Adjustment** window will open.
- Make sure you are on the **Patient** tab.

- Select the the **Payment Date & Pay Method as Adjustment only**

- Enter Adjustment amount and Adjustment reason in these fields. 
- To post payments and exit, select  or select .

Electronic Payments


Downloading ERA Payments

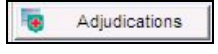
1. Click on .
2. Click on .
3. Wait until  appears on the bottom of the window.
4. Click on .


Posting ERA Adjudications

1. Click on .
2. Locate a payer.


Payer Name	ERA Date	Pay Date	Check/Payment ID
+	Payer Name : AETNA		
+	Payer Name : AMERHEALTH ADMINISTRATORS, INC.		
+	Payer Name : AMERHEALTH, INC.		
+	Payer Name : AMERHEALTH, INC.		
+	Payer Name : BC NEPA, HIGHMARK BLUE SHIELD		
+	Payer Name : BC NEPA, HIGHMARK BLUE SHIELD		
+	Payer Name : CONNECTICUT GENERAL LIFE INSURANCE CO.		
+	Payer Name : CONNECTICUT GENERAL LIFE INSURANCE COMPANY		
+	Payer Name : CONNECTICUT GENERAL LIFE INSURA		
+	Payer Name : CORESOURCE, INC.		
+	Payer Name : DISNEY WORLDWIDE SERVICES, INC.		
+	Payer Name : GREAT WEST LIFE		
+	Payer Name : GREATWESTHEALTHCARE-CIGNA		
+	Payer Name : GWH-CIGNA		
+	Payer Name : HIGHMARK BLUE SHIELD		
3. Locate a check.

Payer Name : AETNA	9/9/2010	9/13/2010	160908100002321	...
4. Open check using the ellipsis button. 
5. Click **OK** to the alert "There are no transactions paid by this check."
6. Copy check number.

ERA Payment ID:	C000039093
-----------------	------------
7. Click on .
8. Paste check number in **Payment ID** field at the top.

Payment ID:	<input type="text"/>
-------------	----------------------
9. Click the  to expand the claim for payment details.

Payment	Ins Adj 1
Allows	Pt Rsp 1
100.00	50.00
100.00	
10. Review payment information.
11. To accept payment, click the **Approved** box.

Aprvd	<input type="checkbox"/>
-------	--------------------------
12. When ready to approve payments, click .


Balancing Electronic Payments

Balancing ERA Payment


1. Click on  .

2. Locate the check.

Payer Name : AETNA		
9/9/2010	9/13/2010	160908100002321

3. Open check using the ellipsis button. 

4. Balance the total amount of the ERA payment at the top against the amount that was posted to patient accounts at the bottom.

5. If check does not balance, the bottom will appear in red. 

6. If check does balance, the amount of the check will appear with no red indicator.

ERA Payment Color Key

Red = Patient Balance

Ins Paid	Ins Bal
Pat Paid	Pat Bal
	85.00

This action will add the amount as a balance on the patient's account.

Green = Patient Credit

Ins Paid	Ins Bal
Pat Paid	Pat Bal
5.00	(5.00)

This action will add the amount as a credit on the patient's account.

Yellow = Cannot approve adjudication

Aprvd
<input type="checkbox"/>

The adjudication does not balance correctly and cannot be approved until marked as a 'Discard' Status.

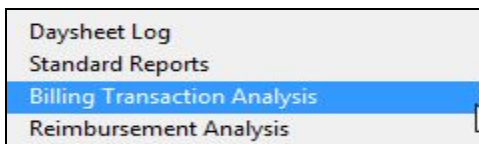
Discard

Reports

Billing Analysis

1. Click **Reports** drop down.

2. Select **Billing Analysis-Transactions for Dates**.



3. Select the **Reference Date**.

Reference dates: 12/28/2012 to: 12/28/2012

4. Select the **Reference Date**.

Reference date:

☐ Charge/payment

☐ Posting (entry)

☐ Daysheet

☐ Daysheet ID

5. To include current transactions, click the check box.

☐ Include non-daysheeted transactions

To include voids (or not) click the check box.

☒ Include voids

6. Click **Refresh Grid** button to generate report.

7. Customize report using **iii** and checking items to include.

8. Isolate categories by dragging column headers to the grey area.

Drag a column header here to group by that column

iii Rend. Provider D.O.S. CPT Charge

Saving Customized Reports

1. Run desired report.

2. Click **New** button.

3. Type in the report name.

Name:


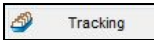
4. Type in report description.

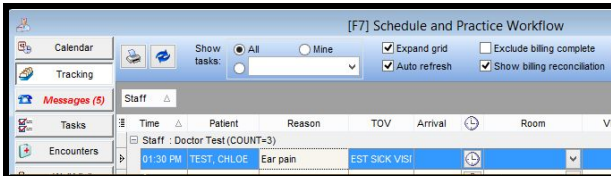
Description:

5. Click **Save** button.

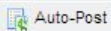

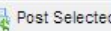

Posting Electronic Superbill Charges

Posting Electronic Superbill Charges

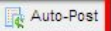
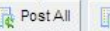
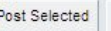

1. Click on .
2. Click on .
3. Check ☒ **Show billing reconciliation** at the top of the **Tracking** window to begin posting superbill charges.
4. Select a patient to post charges for.



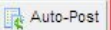

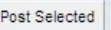

5. Superbill charges will display under the heading **Unposted Charges**.

Unposted Charges					
   					
Date	Prov	CPT-Mod	Description	DX	Description
10/21/2015		99172	OCULAR FU	V20.2	ROUTINE INFA
10/21/2015		85018	HEMOGLOBI	V20.2	ROUTINE INFA
10/21/2015		92552	PURE TONE	V20.2	ROUTINE INFA
10/21/2015		736102		V20.2	ROUTINE INFA

6. Click on **Auto-Post** button to post charges from the Unposted charges directly to the Posted Charges without opening the Add/Edit Charges window.

Unposted Charges					
   					
Date	Prov	CPT-Mod	Description	DX	Description
10/21/2015		99172	OCULAR FU	V20.2	ROUTINE INFA
10/21/2015		85018	HEMOGLOBI	V20.2	ROUTINE INFA
10/21/2015		92552	PURE TONE	V20.2	ROUTINE INFA
10/21/2015		736102		V20.2	ROUTINE INFA

7. To post charges click **Post All**.

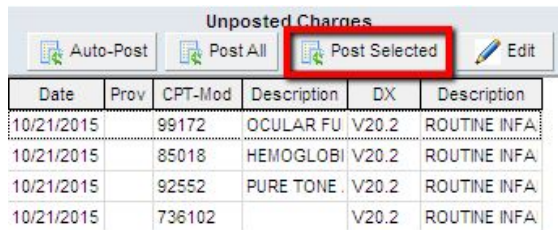
Unposted Charges					
   					
Date	Prov	CPT-Mod	Description	DX	Description
10/21/2015		99172	OCULAR FU	V20.2	ROUTINE INFA
10/21/2015		85018	HEMOGLOBI	V20.2	ROUTINE INFA
10/21/2015		92552	PURE TONE	V20.2	ROUTINE INFA
10/21/2015		736102		V20.2	ROUTINE INFA

8. The **Add/Edit Charges window** will open.

9. After verifying charges, click or to exit.

Note: Once you post the charges, clicking Cancel will not undo the posting of charges.

10. To post selected charges or split charges into 2 separate claims, highlight the desired transactions to post together and click **Post Selected**.

A screenshot of the 'Unposted Charges' window. At the top, there are four buttons: 'Auto-Post', 'Post All', 'Post Selected' (which is highlighted with a red rectangle), and 'Edit'. Below the buttons is a table with the following data:

Date	Prov	CPT-Mod	Description	DX	Description
10/21/2015		99172	OCULAR FU	V20.2	ROUTINE INFA
10/21/2015		85018	HEMOGLOBI	V20.2	ROUTINE INFA
10/21/2015		92552	PURE TONE	V20.2	ROUTINE INFA
10/21/2015		736102		V20.2	ROUTINE INFA

11. The **Add/Edit Charges** window will open.

12. After verifying charges click or to exit.

Note: Once you post the charges, clicking Cancel will not undo the posting of charges.

Notes: