


Table of Contents - *Jump to a section below*[Posting Charges/Converting Superbills](#)[Manually Create Claims](#)[Closing the Day and Sending Claims](#)[Processing Clearinghouse \(CH\) Reports](#)[Posting Payments and Adjustments](#)[Electronic Payments \(ERAs\)](#)[Reports](#)**Posting Charges/Converting Superbills****Posting Superbills from Tracking**

1. Access the Tracking window: **Clinical, Practice Management, or Billing tab > Schedule button > select My View or Office View tab > Tracking radio button.**
2. Choose a different date in the **Date** drop-down, if necessary.
3. If not already selected, select the **Show Billing Panel** checkbox.
4. Review the **Billing Status** or **Superbill Stage** column to determine what charges can be posted per your practice workflow.
5. Select a patient to post charges for. The charges show in the **Unposted Charges** section of the window.
6. Choose one of the following options:
 - **Auto-post:** *Available only if activated by an Administrator in Global Preferences.* The **Add/Edit Charges** window briefly opens and closes. The charges are posted, and the claim is sent to the Transmit Queue.
Note: Edits may still be made to the posted charges by clicking the **Edit** button located in the **Posted Charges** section of the window. This opens the **Add/Edit Charges** window where you can make your edits.
 - **Post All:** The **Add/Edit Charges** window opens with all charges in the Unposted section added to the claim.
 - **Post Selected:** Select individual charges to be added to the claim prior to clicking **Post Selected**. The **Add/Edit Charges** window opens with the selected charges added to the claim.
Note: If a Warning box is displayed that states that there is missing information (such as a missing Rendering Provider, missing DX Code, or a Supervising Provider is needed on the claim), click the **OK** button. Add the missing or required information and then click the **Import Superbill** button to import the charges and continue with posting.

7. From within the **Add/Edit Charges** window, verify the claim information and add information to the **Other Items (1-27)** tab, if needed.


Note: To review the patient's visit note to ensure that all services rendered are displayed on the Superbill, click the **View Event Chronology** button  to navigate to the Event Chronology for the patient's visit. If edits are necessary after reviewing the Chron, navigate back to the patient and click the **Edit** button.

8. Choose one of the following options to save and close the **Add/Edit Charges** window:
 - **Save + Queue:** The charges are converted to a claim and sent directly to the Transmit Queue.
 - **Save:** The charges are converted to a claim but not sent to the Transmit Queue.
 - **Cancel:** The charges are converted to a claim but not sent to the Transmit Queue.

Posting Superbills from the Patient Chart

1. Access **Charges** in the Patient Chart: **Clinical, Practice Management, or Billing tab > Patient Chart button > Select Patient > Charges.**
2. Choose one of the following options:
 - **Post All:** The **Add/Edit Charges** window opens with all charges in the Unposted section added to the claim.
 - **Post Selected:** Select individual charges to be added to the claim prior to clicking **Post Selected.** The **Add/Edit Charges** window opens with the selected charges added to the claim.

Note: If a Warning box is displayed that states that there is missing information (such as a missing Rendering Provider, missing DX Code, or a Supervising Provider is needed on the claim), click the **OK** button. Add the missing or required information and then click the **Import Superbill** button to import the charges and continue with posting.
3. Verify the claim information and add information to the **Other Items (1-27)** tab, if needed.

Note: To review the patient's visit note to ensure that all services rendered are displayed on the Superbill, click the **View Event Chronology** button  to navigate to the Event Chronology for the patient's visit. If edits are necessary after reviewing the Chron, navigate back to the patient and click the **Edit** button.
4. Choose one of the following options to save and close the **Add/Edit Charges** window:
 - **Save + Queue:** The charges are converted to a claim and sent directly to the Transmit Queue.
 - **Save:** The charges are converted to a claim but not sent to the Transmit Queue.
 - **Cancel:** The charges are converted to a claim but not sent to the Transmit Queue.

[Back to top](#)

Manually Create Claims

Create a Claim from Tracking

1. Access the Tracking window: **Clinical, Practice Management, or Billing tab > Schedule button > select My View or Office View tab > Tracking radio button.**
2. Choose a different date in the **Date** drop-down, if necessary.
3. If not already selected, select the **Show billing panel** checkbox.
4. Select a patient to post charges for.
5. Click the **Claim** button. The **Add/Edit Charges** window opens.
Note: The **Claim** button is only available if the patient has no superbill charges.
6. Enter the claim information.
7. Choose one of the following options to save and close the **Add/Edit Charges** window:
 - **Save + Queue:** The claim is sent directly to the Transmit Queue.
 - **Save:** The claim is saved but not sent to the Transmit Queue.
 - **Cancel:** The claim is saved but not sent to the Transmit Queue.

Create a Claim from the Patient Chart

1. Access Charges in the Patient Chart: **Clinical, Practice Management, or Billing tab > Patient Chart button > Select Patient > Charges.**
2. Click the **New Claim** button. The **Add/Edit Charges** window opens.
3. Enter the claim information.
4. Choose one of the following options to save and close the **Add/Edit Charges** window:
 - **Save + Queue:** The claim is sent directly to the Transmit Queue.
 - **Save:** The claim is saved but not sent to the Transmit Queue.
 - **Cancel:** The claim is saved but not sent to the Transmit Queue.

[Back to top](#)

Closing the Day and Sending Claims

Balancing Payments

1. Access Receipts in the Billing Center: **Billing tab > Billing Center button > Receipts tab.** The current Receipts (those that have not yet been daysheeted) are displayed.

2. Review the amounts and totals entered into the system in comparison to physical money collected for all Pay Methods, as applicable.

Note: Group the grid by Staff and Payment Method by dragging the **Staff** and **Payment Method** column headers to the Group bar.

3. Click the **Print Grid** button to print the grid as it is displayed.

Close Out Daily Activity: Processing the Daysheet

1. Access Claims (A/R) in the Billing Center: **Billing tab > Billing Center button > Claims (A/R) tab.**
2. Click the **Daysheet** button. The **Process the Daysheet** window opens.
3. In the **Current Transactions to Include** section, select the options you want to include in the daysheet.
4. Click the **Daysheet** button to process the daysheet.
5. Confirm you have updated the Transmittal Queue by clicking **Yes** or **No**.
 - Click **Yes** to process the daysheet. A print preview of the Daysheet opens. This does not need to be printed as a copy is saved and is accessible in Admin Documents: **Admin tab > Admin Documents button.**
 - Click **No** to exit the Daysheet process and update the Transmittal Queue by reviewing claims left in the queue.

Sending Claims to the Transmit Queue (if you used the Save option when posting charges)

1. Access Claims (A/R) in the Billing Center: **Billing tab > Billing Center button > Claims (A/R) tab.**
2. Use the **Stage** drop-down menu to select **Unsent (not transmitted or printed).**
3. Expand the claims to review them prior to sending them to the Transmit Queue, if necessary.
4. Click **Sel All** to select all unsent claims.
5. Click the **Q Prim** button to queue the claims to their primary payer(s).

Sending or Transmitting Claims

1. Access the Transmit Queue in the Billing Center: **Billing tab > Billing Center button > Queue tab.**
2. Click the **Create Files** button to create claim files to send to the clearinghouse.
3. Click **Yes** to create claim files.
4. Click **Yes** to transmit the files.

Note: The claims are no longer visible in the Transmit Queue and will be updated to reflect the **Q2: Transmitted** category code.

5. Review any claims that remain in the Transmit Queue ,such as:

- Claims for payers who receive paper claims remain in the Queue and should be printed by clicking the **CMS 1500** button.
- Self-pay claims should be deleted from the Queue. This deletion may also be done prior to creating the claim file.
- Claims that cannot be transmitted for another reason (such as missing information for submission) also remain in the queue. The status of these claims should be reviewed in the Patient Chart, the information should be corrected, and the claim should be requeued for transmission.

[Back to top](#)

Processing Clearinghouse (CH) Reports

Fetching and Processing CH Reports

1. Access Claims (A/R) in the Billing Center: **Billing tab > Billing Center button > Claims (A/R) tab.**
2. Click the **Fetch Files** button.
3. Click **Yes** to confirm you want to fetch payer reports.
4. Click the **Process** button.
5. Click **Yes** to process payer reports.

Managing Rejections

1. Access Claims (A/R) in the Billing Center: **Billing tab > Billing Center button > Claims (A/R) tab.**
2. Use the **Stage** drop-down menu to select **Rejected/Denied**.
3. Select the **Status History** radio button.
4. Expand the claim to review the rejection details.

[Back to top](#)

Posting Payments and Adjustments

Posting an Insurance Payment (EOB) from the Patient Chart

1. Access Payments in the Patient Chart: **Clinical, Practice Management, or Billing tab > Patient Chart button > Select Patient > Payments.**
2. Click the **New Payment** button. The **Add Payments and Adjustments** window is displayed.
3. Confirm you are on the **Insurance** tab (green background).
4. Edit the following information, if necessary:

- **Date:** Defaults to current date the payment is being posted.
 - **Pay method:** Select the method of payment from the drop-down menu.
 - **Check/Ref#:** This is required when using **CK** (check) as the Pay method. Enter payment identification or reference number.
 - **M:** Memorizes the check number that is entered.
 - **Ck:** Reuses the last memorized check number.
 - *(Optional)* **Memo:** Used to identify a specific remark on an EOB. It will display on the claim.
 - **Amount:** Populates as you add payments into the payment fields.
 - **Claim note:** View a claim note on the claim you are posting to or create a new note for the claim. To create a follow up task for the claim, click the **Task** button.
5. Locate the claim for which the payment is being made.
 6. Enter the payment information for each claim line:
 - Enter the **Allowable** amount.
 - Enter the **Patient Responsibility (Pat Resp)** amount.
 - Review the auto-calculation of the payment amount.
 7. Enter or edit the **Adjust Reason** codes.
 8. Edit the **Patient Action**, if necessary.
 9. Verify that the total amount posted matches the EOB.
 10. Click **Save + Close** to post the payment or **Cancel** to cancel the posting and exit the window.

Posting a Patient Payment from the Patient Chart

1. Access Payments in the Patient Chart: **Clinical, Practice Management, or Billing tab > Patient Chart button > Select Patient > Payments.**
2. Click the **New Payment** button. The **Add Payments and Adjustments** is displayed.
3. Confirm you are on the **Patient** tab (pink background).
4. Edit the **Date** and **Pay method**, if necessary.
Note: If the payment is being applied from the patient's credits, select **PC Patient Credit**.
5. Enter the **Check/Ref #**. This is required when using **CK** (check) as the Pay method.
6. Locate the claim for which the payment is being made.
7. Enter the **payment amount, adjustment amount, and adjustment reason** for each claim line.
Note: The **Pay in Full** button may be used to quickly apply the full amount owed on each respective claim line.
8. Edit the **Patient Action**, if necessary.
9. Verify the total amount posted matches the payment received.

10. Click **Save + Close** to post the payment or **Cancel** to cancel the posting and exit the window.

Posting an Adjustment

1. Access Payments in the Patient Chart: **Clinical, Practice Management, or Billing tab > Patient Chart button > Select Patient > Payments.**
2. Click the **New Payment** button.
3. Select the **Patient** or **Insurance** tab.
4. Edit the **Date**, if necessary.
5. Click the **Pay method** drop-down and select **AD Adjustment Only.**
6. Enter the **Check/Ref #**, if applicable.
7. Locate the claim for which the adjustment is being made.
8. Enter the **adjustment amount** and **adjustment reason** for each claim line.
9. Edit the **Patient Action**, if necessary.
10. Click **Save + Close** to post the payment or **Cancel** to cancel the posting and exit the window.

[Back to top](#)

Electronic Payments (ERAs)

Fetching and Processing ERA Payments

1. Access Adjudications in the Billing Center: **Billing tab > Billing Center button > Adjudications tab.**
2. Click the **Fetch Files** button to fetch Adjudication files.
3. Click the **Process** button to add ERA files.

Posting ERA Adjudications

1. Access ERA Payments in the Billing Center: **Billing tab > Billing Center button > ERA Payments tab.**
2. Locate the ERA within the Payer grouping.
3. Click the blue link in the **Unposted Payments** column for the ERA to be posted. The **Adjudications** tab opens with the adjudications for that ERA.
4. Review the details of each adjudication and set the appropriate **Match Status.**
5. Select the **Aprvd** (Approved) checkbox for all transactions to post.
6. Click the **Post Paymt** (Post Payment) button.
7. Click **Yes** to confirm posting of all approved adjudications.

Balancing ERA Payments

1. Access ERA Payments in the Billing Center: **Billing tab > Billing Center button > ERA Payments tab.**
2. Locate the ERA within the Payer grouping.

Note: When an ERA is unbalanced, the entire ERA row is highlighted yellow.

3. Click the **Ellipsis** button located next to the **Check/Payment ID** to view the transactions posted on the corresponding ERA.
 - If a payment is out of balance because of how the Adjudications were matched, void and re-enter or edit payment information in the Patient Chart making sure to note the same ERA and Payment ID number.
 - If a payment is out of balance because the payment is split between OP and a legacy billing system:
 - a. Post the appropriate payments in the legacy system.
 - b. Confirm that the total amount posted in the legacy system and the total amount posted in OP equal the amount of the payment.
 - c. In the Transactions Paid by ERA Payment ID window, select the **Override out of balance indicator** checkbox.

Note: This checkbox is only visible to users with the permission: **Billing_Payment_Supervisor.**
 - d. Enter a reason for the override.

[Back to top](#)

Reports

A/R Aging Analysis

Note: You must have the permission, **OP_Rpts_AR** in order to access this report.

1. Access A/R Aging Analysis in the Billing Center: **Billing tab > A/R button > A/R Aging Analysis button**
2. Select an A/R Report type from the **Choose a Report** drop-down menu.
3. Select the appropriate radio button:
 - **Show Summary Totals:** Shows total summaries of aging bucket breakdowns.
 - **Show Patient Details:** Shows aging bucket breakdown but includes patient details accessible by expanding the data using the +.
4. Click **Refresh**. The aging buckets populate.

Note: You may choose to print the grid as it appears on screen by checking the **Print expanded area** checkbox.

Billing Analysis

1. Access ERA Payments in the Billing Center: **Billing tab > Transactions button > Transaction Analysis button.**

2. Enter the start and end **Reference Dates**.
3. Choose the appropriate **Reference Date** radio button.
4. Include non-daysheeted transactions and/or voids by checking the corresponding checkboxes.
5. Customize the report by:
 - Adding, deleting, or reordering columns.
 - Grouping the data by dragging the column heading to the Grouping bar.
6. Click the **Refresh Grid** button to load the report.

Saving Customized Billing Analysis Reports

1. Navigate to and run the report you want to save.
2. In the **Rpt. Name** field, enter a name for the report.
3. In the **Description** field, enter a description of the report.
4. Click the **Save** button.

Exporting Billing Analysis Reports

1. Navigate to and run the report you want to save.
2. *(Optional)* Save the report.
3. Click the **Export** button. The exported report appears exactly how it appears in the grid. Be sure to expand the data in the grid prior to exporting if a detailed report is needed. The **Save As** window opens.

Cloud Practices:

- a. Navigate to the **Network** drive in the **Save As** window.
- b. Double-click **tsclient**.
- c. Double-click the **\\tsclient\C Share** or your **local folder**.
- d. In the **File name** field, name the report.
- e. Click **Save**.

On-Premise Practices:

- a. Select the location to which you would like to export the report.
- b. In the **File name** field, name the report.
- c. Click **Save**.

[Back to top](#)