

## Streamlined, Efficient Billing Workflows

**EZ Claim Billing** is a plug-in to NextStep Solutions that allows for the transfer, import, and processing of client billing data in a quick, efficient manner. Whether it be from Notes, Treatment Plans, or any other billable service, making sure that the data from your system enters the EZ Claim Billing Engine and respective que is crucial to your agency's financial well-being.

## Billing Box Setup and Other Prerequisites

Before you begin to leverage EZ Claim and its functionality, there are a couple of prerequisite actions that must be completed in order to use it to its fullest and most agency-specific. Here's what you need to do:

### Step by Step - EZ Claim Setup Prerequisites

1. From the Main Menu > Admin Tools, click **System Setup**.
2. Navigate to the **Billing Setup** tab..
3. Select one of the following options:
  - **Add New Field** - Allows for addition of a line item to the Billing Box
  - **Edit Selected Field** - Changes/updates available options in the selected dropdown menu
  - **Discontinue Selected Field** - Removes select field(s) from the Billing Box

Select Field(s)	Order	Field	Type
<input type="checkbox"/>	▲▼ 1	Activity Code	Dropdown
<input type="checkbox"/>	▲▼ 2	Start time	Time
<input type="checkbox"/>	▲▼ 3	Stop time	Time
<input type="checkbox"/>	▲▼ 4	Authorization	Authorization Choice
<input type="checkbox"/>	▲▼ 5	DSM-V Diagnosis	Diagnosis (DSM-5)
<input type="checkbox"/>	▲▼ 6	Program	Dropdown
<input type="checkbox"/>	▲▼ 7	Rendering Provider	User Dropdown
<input type="checkbox"/>	▲▼ 8	Service Location	Dropdown

**Add New Field**

**Edit Selected Field**

**Discontinue Selected Fields**

**Main Menu**

4. Once you've entered your changes, click **Main Menu** to record the changes and return.

## Testing Setup with a Miscellaneous Note

With the prerequisite Billing Box setup completed via System Setup, it's now time to test our setup to make sure it works the way your agency needs it to. Here's how to test your EZ Claim setup with a Miscellaneous Note in NextStep:

### Step by Step - Testing EZ Claim with a Misc Note

1. From the Main Menu > Progress Notes, click **Misc Notes**.
2. Identify a client/test client to use.
3. Scroll to the **Billing Data 1** Billing Box (greyed out).

Date of Service:

The patient did not show because:  
 Extenuating Circumstances (car broke down, etc)  Forgot Appointment  
 Other, as specified in the note

Billing Data 1: (Flag this Billing Data for deletion)

Activity Code:  (0 minutes per unit)

Start time:  (Format: hh:mm AM/PM)

Stop time:  (Format: hh:mm AM/PM)

Authorization:

DSM-V Diagnosis:

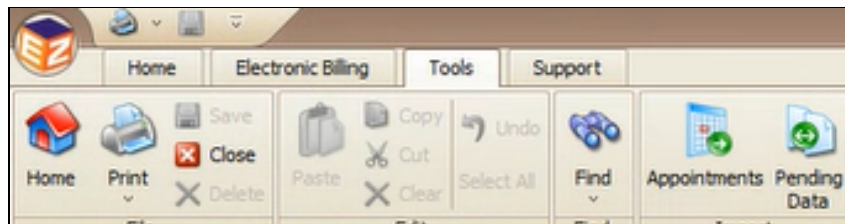
Program:

Rendering Provider:

Service Location:

[Add Additional Billing Data](#)

4. Enter appropriate/required billing data in all fields.
5. Scroll to the bottom of the page and click **Enter Note (Final)** to sign/seal the note.
6. Log into EZ Claim Billing.
7. Navigate to the **Tools** tab.



8. Click **Pending Data**.
9. Review the list of Pending Data to verify your billing data came through from NextStep.
10. From this list, perform one of the following:
  - **Bulk Import** - Click **Check All**, then **Import Checked** to pull the billing data.
  - **Individual Import** - Place a check next to individual records, then click **Import Checked**.
  - For both options, you can place a checkmark next to **Import data into existing claims...** to add the billing information to existing claims that haven't been sent out/processed. If left unchecked, this will create a new claim for any checked item.
11. Selected billing items will disappear once imported.

Drag a column header here to group by that column									
Patient	Payer Name	Rendering	Diagnosis 1	Place	Procedure Code	Mod 1	From Date	Start Time	End Time
<input type="checkbox"/>	Filter	Filter	Filter	Filter	Filter	Filter	Filter	Filter	Filter
<input checked="" type="checkbox"/>				11	ZW90853	27	02/04/2021	5:30 PM	7:00 PM
<input checked="" type="checkbox"/>					99214		03/25/2021	1:00 PM	1:30 PM
<input checked="" type="checkbox"/>				12	H0023		03/19/2021	12:00 PM	1:00 PM
<input checked="" type="checkbox"/>				11	ZY90837		03/16/2021	1:00 PM	2:00 PM
<input checked="" type="checkbox"/>				11	ZY90837		03/23/2021	1:00 PM	2:00 PM
<input checked="" type="checkbox"/>					ZY90837		03/09/2021	1:00 PM	2:00 PM
<input checked="" type="checkbox"/>				11	ZY90837		03/30/2021	1:00 PM	2:00 PM
<input checked="" type="checkbox"/>				11	ZY90837	75	04/06/2021	4:00 PM	5:00 PM

Import Checked

Save

Close

Check All

Uncheck All

Check Selected

Uncheck Selected

Import data into existing claims that haven't been printed or exported