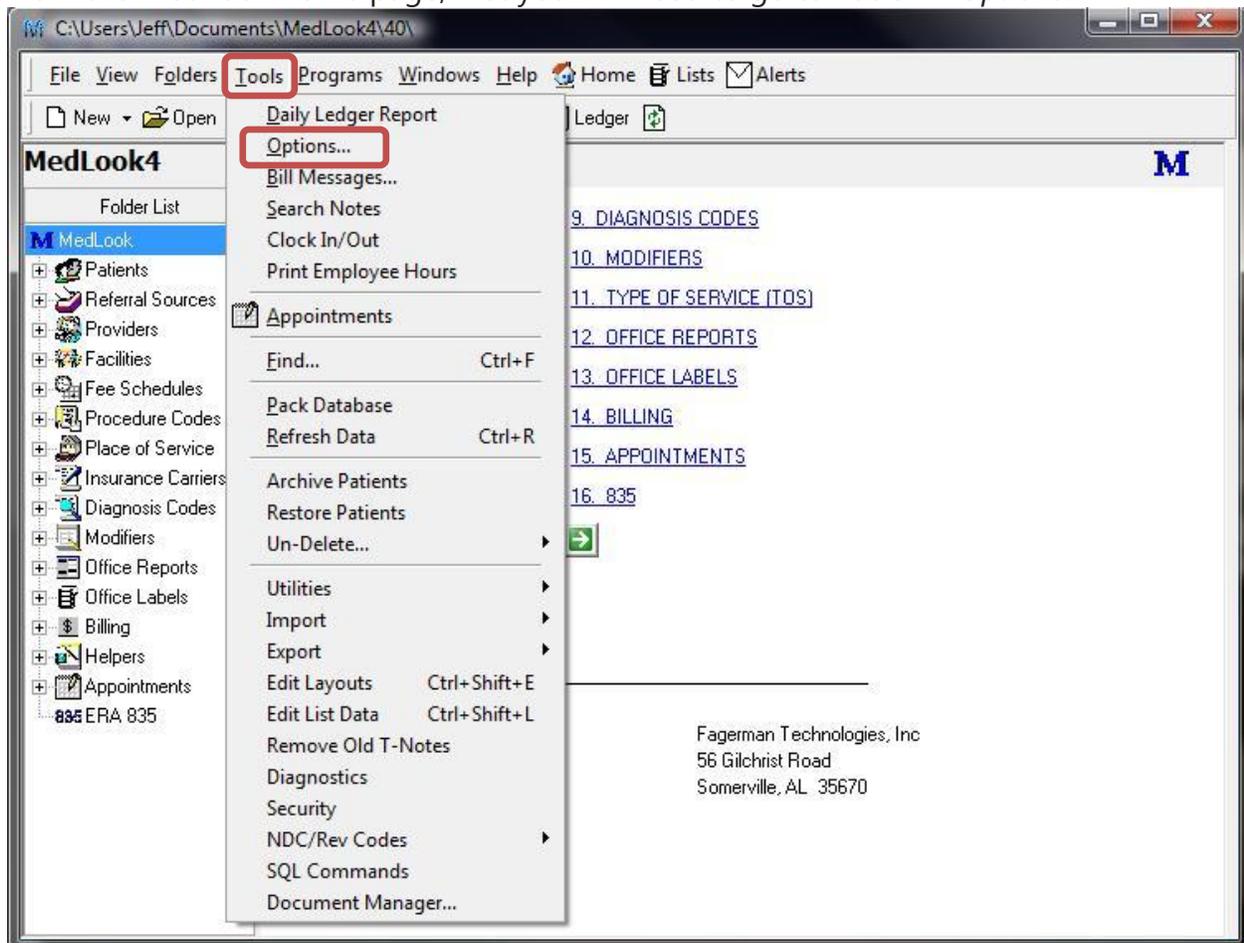
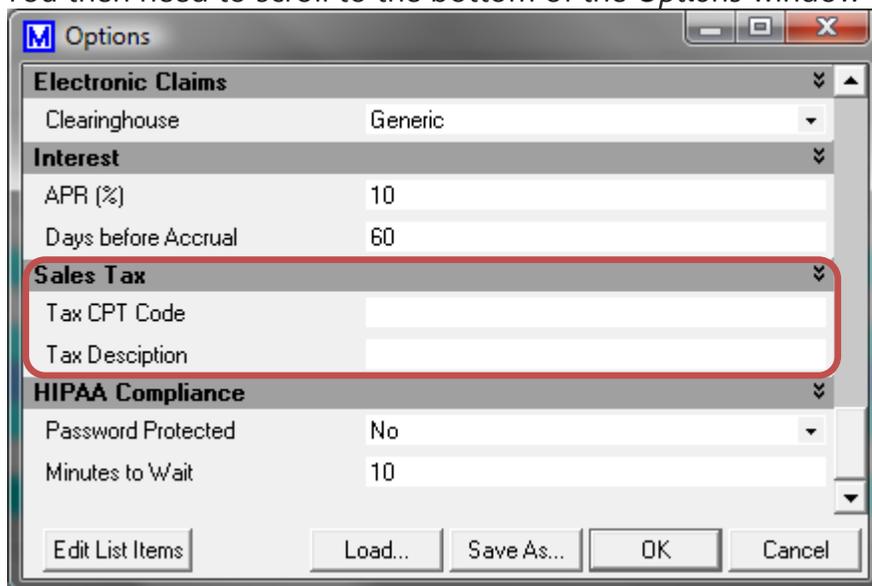


Adding Sales Tax to a Charge

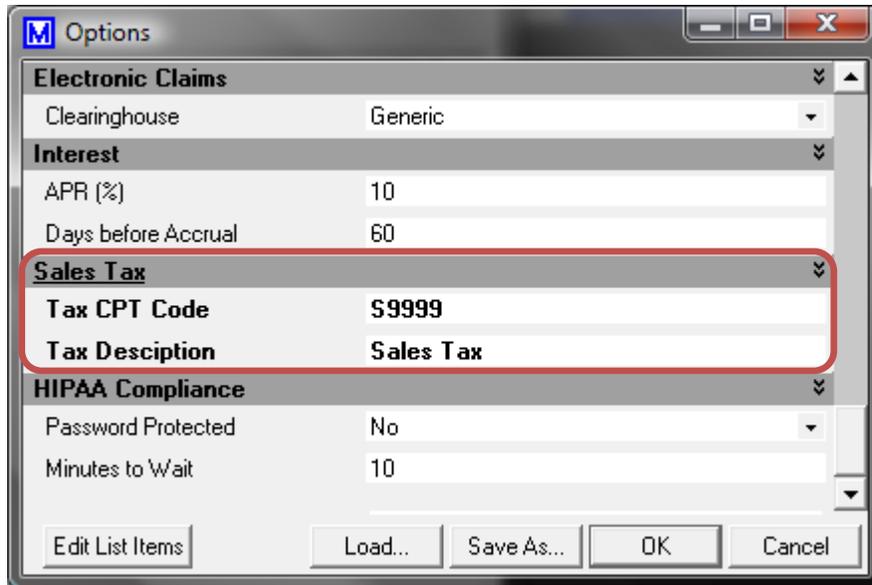
From the MedLook home page, first you will need to go to *Tools -> Options*.



You then need to scroll to the bottom of the *Options* window to the *Sales Tax* section.



Looking at the *Sales Tax* section, the *Tax CPT Code* is the code that will show up as the sales tax. Since insurance companies will not take "sales tax" on the CMS1500 form, you have to give sales tax a CPT code, EX. S9999. *Tax Description* is just the title you want to give the sales tax. It could be "Sales Tax" or you can change it to say "AL State Tax". **You must to have both *Tax CPT Code* and *Tax Description* filled in for the sales tax to work correctly.**

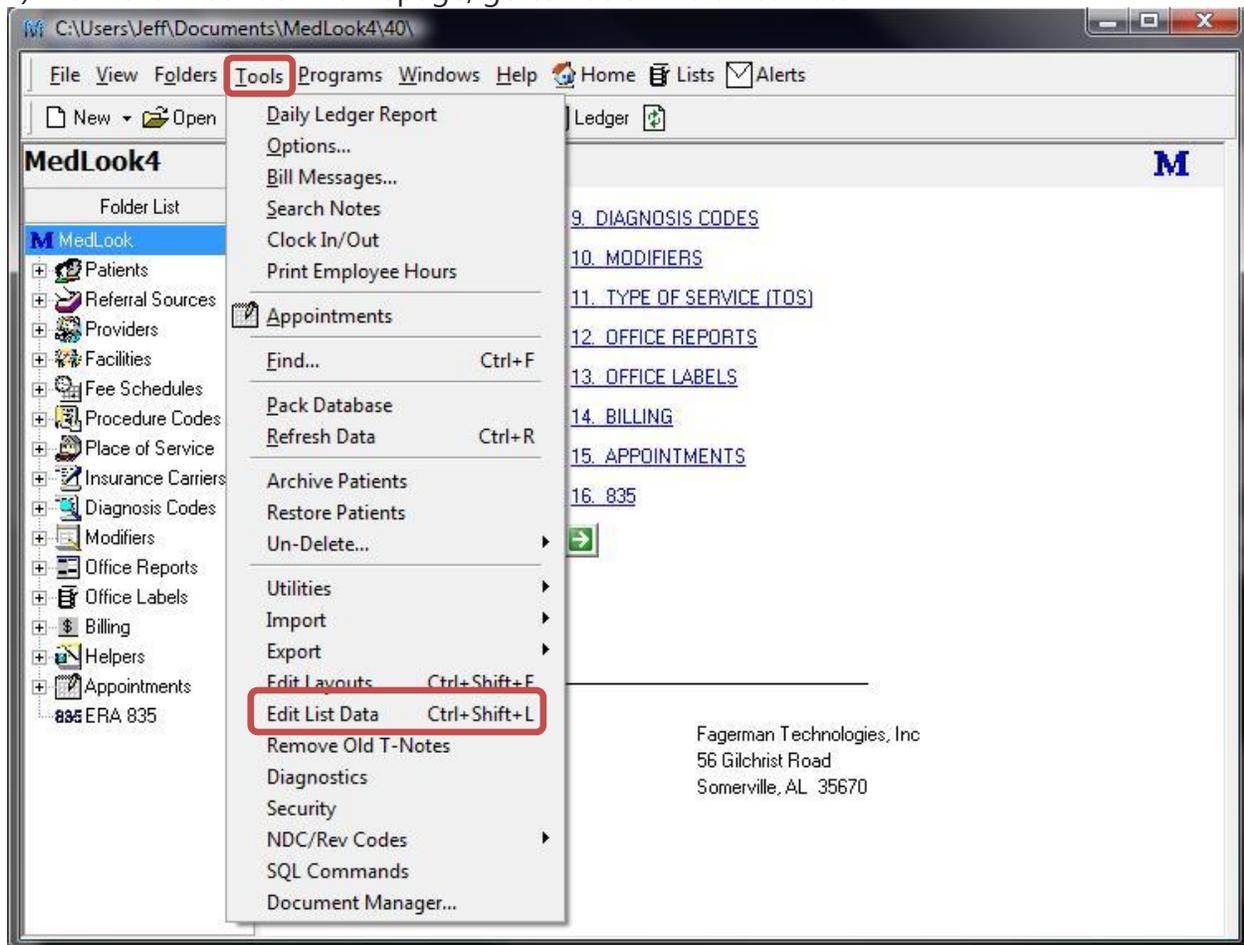


The image shows a screenshot of a software dialog box titled "Options". The dialog box is divided into several sections: "Electronic Claims", "Interest", "Sales Tax", and "HIPAA Compliance". The "Sales Tax" section is highlighted with a red rectangular box. Within this section, the "Tax CPT Code" is set to "S9999" and the "Tax Description" is set to "Sales Tax". Other sections include "Electronic Claims" with a "Clearinghouse" dropdown set to "Generic", "Interest" with "APR (%)" set to "10" and "Days before Accrual" set to "60", and "HIPAA Compliance" with "Password Protected" set to "No" and "Minutes to Wait" set to "10". At the bottom of the dialog box, there are buttons for "Edit List Items", "Load...", "Save As...", "OK", and "Cancel".

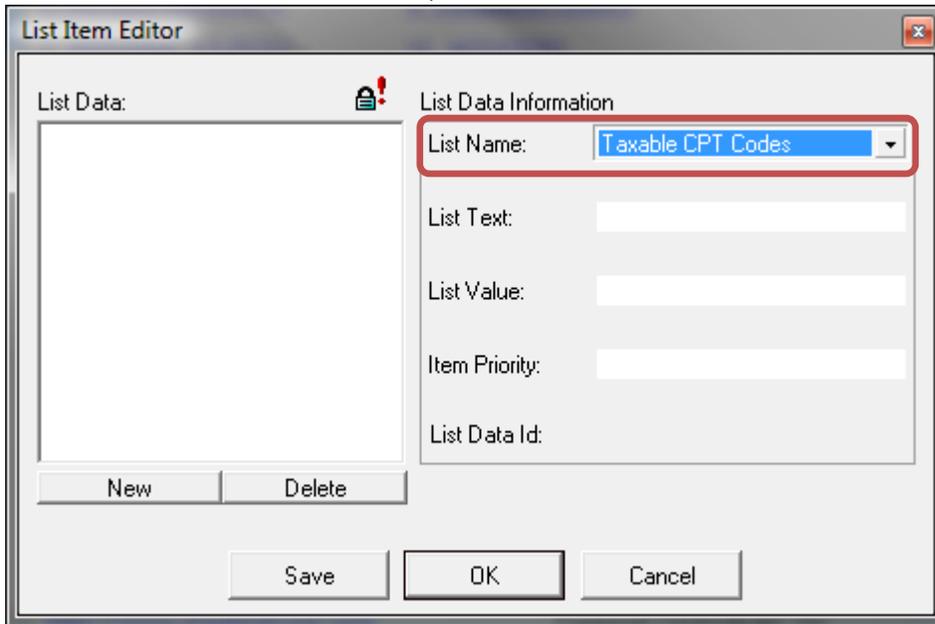
Section	Field	Value
Electronic Claims	Clearinghouse	Generic
	Interest	
Interest	APR (%)	10
	Days before Accrual	60
Sales Tax	Tax CPT Code	S9999
	Tax Description	Sales Tax
HIPAA Compliance	Password Protected	No
	Minutes to Wait	10

There are two ways to add a sales tax record to ML.

1) From the MedLook homepage, go to *Tools->Edit List Data*.

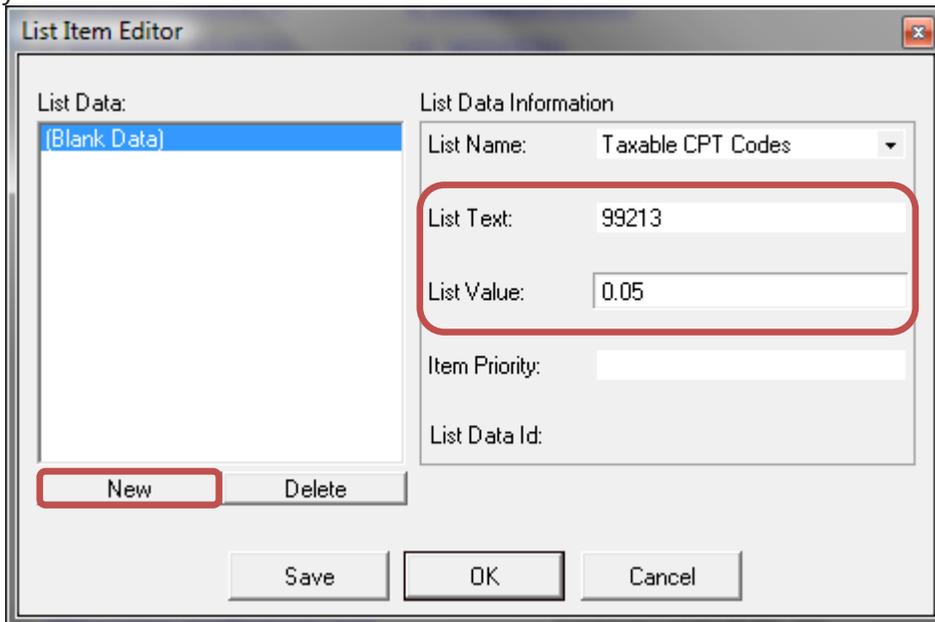


On the *List Item Editor* window, select *Taxable CPT Codes* from the *List Name* dropdown.



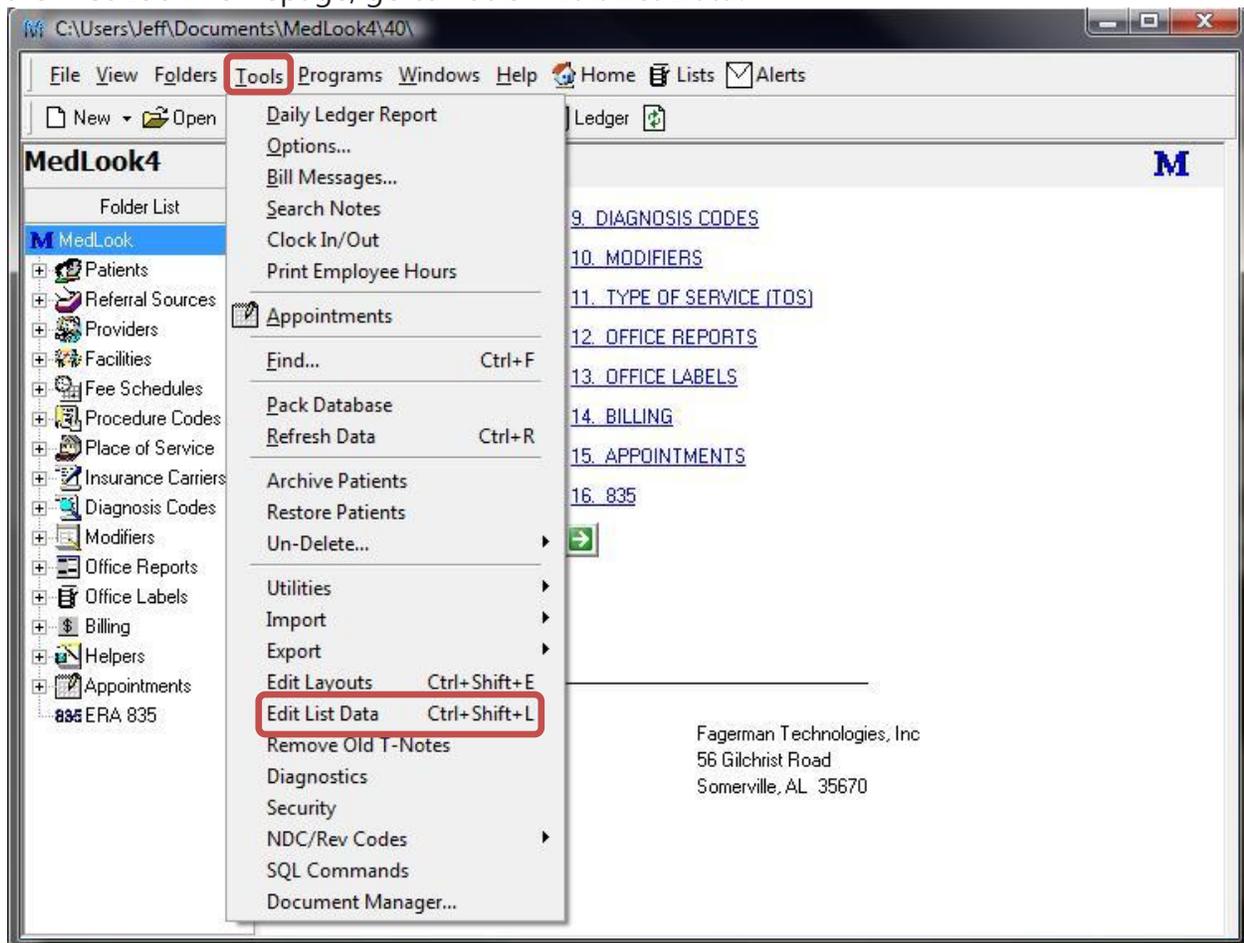
The screenshot shows the 'List Item Editor' window. On the left, there is a 'List Data' section with a large empty list box and a 'New' button below it. On the right, the 'List Data Information' section contains several input fields: 'List Name' (a dropdown menu currently showing 'Taxable CPT Codes'), 'List Text', 'List Value', 'Item Priority', and 'List Data Id'. At the bottom of the window are 'Save', 'OK', and 'Cancel' buttons.

Once you have *Taxable CPT Codes* selected, you will need to create a new item by clicking the *New* button. Once the new item is in the list you need to add in the *List Data Information*. In the *List Text* box you will add the CPT code that needs to be taxed. So if you wanted to add sales tax to CPT code 99213 then you would type 99213 in the *List Text* box. In the *List Value* box you will enter the tax rate in decimal form, EX. 5% tax = 0.05. Once you have the information entered **click Save**.

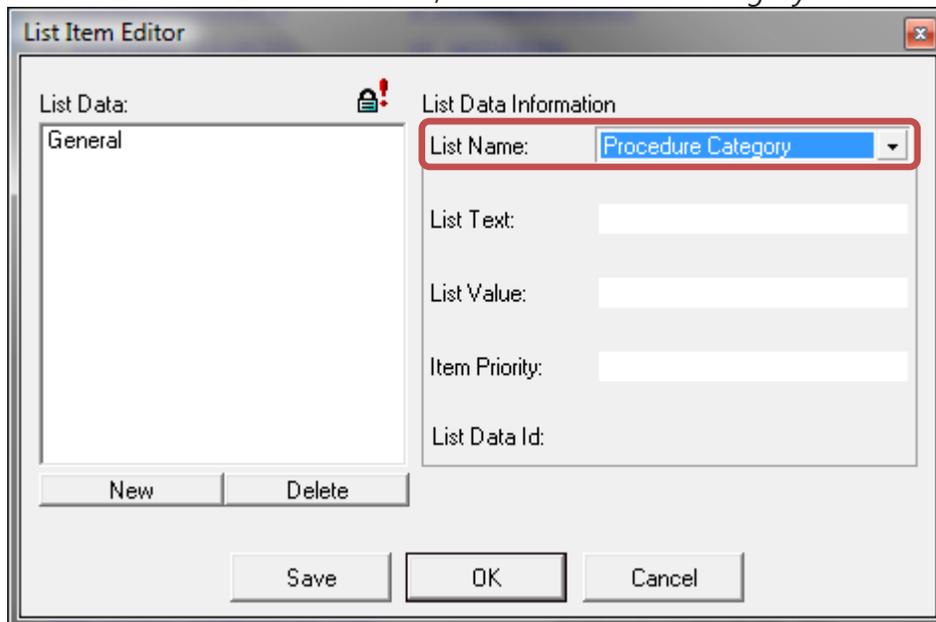


The screenshot shows the 'List Item Editor' window after a new item has been added. The 'List Data' section now contains a list with one item, '(Blank Data)', which is highlighted in blue. The 'List Data Information' section on the right has the 'List Name' dropdown set to 'Taxable CPT Codes'. The 'List Text' field contains '99213' and the 'List Value' field contains '0.05'. The 'New' button at the bottom left is highlighted with a red box. The 'Save', 'OK', and 'Cancel' buttons are also visible at the bottom.

2) This way of adding sales tax allows you to add a tax rate to a group of CPT codes. From the MedLook homepage, go to *Tools->Edit List Data*.



On the *List Item Editor* window, select *Procedure Category* from the *List Name* dropdown.



Then, click *New* and enter a category name in *List Text*, EX: Taxable Codes. In the *List Value* box you need to enter a category that is not already in the list. For example, if there are 5 categories and they have the list values of 1, 2, 3, 4, 5 then you will need to enter 6 for the *List Value*. Once this is done **click Save**.

List Item Editor

List Data:

- General
- (Blank Data)

List Data Information

List Name: Procedure Category

List Text: Taxable Codes

List Value: 6

Item Priority:

List Data Id:

New Delete

Save OK Cancel

Back on the MedLook homepage, go to the *Procedure Codes* folder.

Procedure Codes Table (15)

Code	Description	Fee in \$	TOS	Link	Modifier 1	Modifier 2	Modifier 3	Modifier 4	Valid C
86580	Intra TB Skin Test	\$15.00	5		GV				True
86580	Intra TB Skin Test	\$15.00	5		QW				True
86580	Intra TB Skin Test	\$12.00	2						True
99213	Office Visit	\$72.00	1		GV				True
99213	Office Visit	\$60.00			QB				True
99213	Office Visit	\$72.00	1		QB				True
99214	Est Patient-level 4	\$100.00	1		QB				True
99214	Est Patient-level 4	\$100.00	1		GV				True
99245	Office Consultation	\$100.00	1						True
G0008	Inj Influenza Vaccine	\$15.00	1						True
G0008	Inj Influenza Vaccine	\$15.00	1		GV				True
G0008	Inj Influenza Vaccine	\$15.00	1						True
G0008	Inj Influenza Vaccine	\$15.00	1		GV				True
G0009	Inj Pneumonia Vaccine	\$15.00	1		GV				True
G0009	Inj Pneumonia Vaccine	\$15.00	1						True

Record: 1 of 15

Double-click on the desired procedure code and set it to the new category you added and **click Save**. You can do this with multiple procedure codes.

Procedure (99213QB)

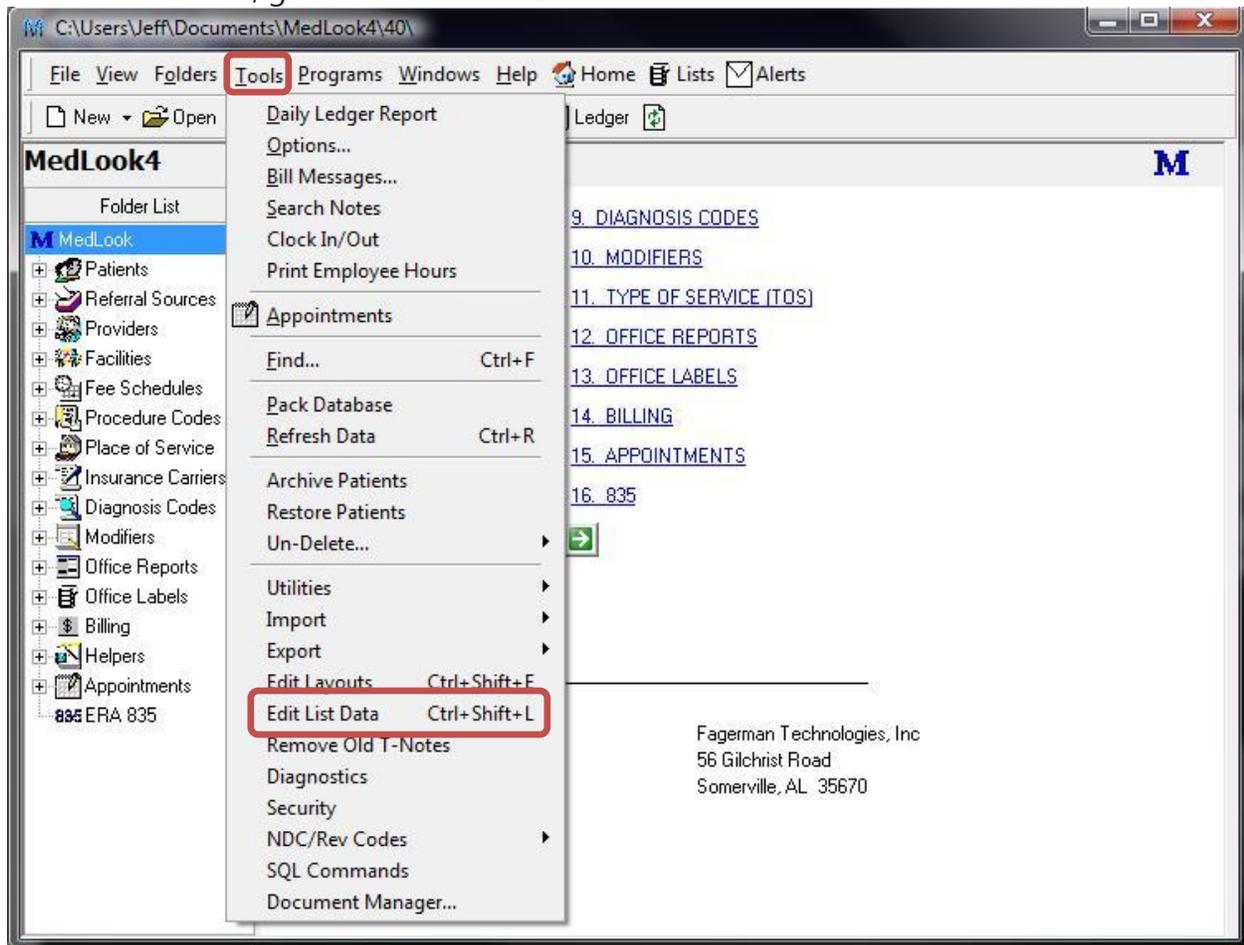
New Find 99213 Copy Refresh Save Delete Recent Go Back

Procedure Qualifiers:

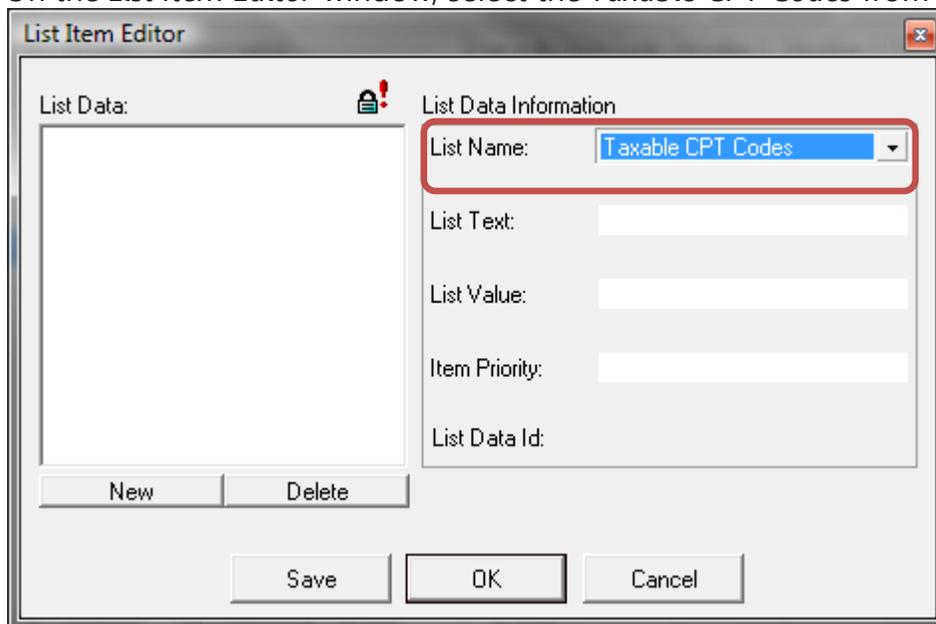
Code	Description	Modifiers	Link	Fee	Fee Schedule	Doc	Nbr	Auth Units
99213	Office Visit	QB		60	NONE			0

Procedure Category: Taxable Codes

Once that is done, go back to *Tools->Edit List Data*.



On the *List Item Editor* window, select the *Taxable CPT Codes* from *List Name*.



Now, create a new item by clicking the *New* button. To add a sales tax to a category you will need to type "cat-" then the category name in the *List Text* box, EX cat-Taxable Codes. **This box is case-sensitive.** Then enter the tax rate in decimal form to *List Value*, EX. 5% tax= 0.05. Then **click Save.**

The screenshot shows the 'List Item Editor' dialog box. On the left, there is a 'List Data' section with a list containing '(Blank Data)'. On the right, the 'List Data Information' section contains several fields: 'List Name' (Taxable CPT Codes), 'List Text' (cat-Taxable Codes), 'List Value' (0.05), 'Item Priority' (empty), and 'List Data Id' (empty). At the bottom, there are buttons for 'New', 'Delete', 'Save', 'OK', and 'Cancel'. The 'New' button is highlighted with a red box.

Now, whenever you add a charge that uses one of the procedure codes that is linked to sales tax, a sales tax charge will be added once you click the Save button on the charge screen. You can view this by going to the *Billing* tab, where it says *Explanation* it will have the *Tax CPT Code*, and under the column entitled *Comment* it will have the *Tax Description*.

The screenshot shows a billing software interface with a table of charges. The table has columns for TR #, DOS, Thru DOS, Amount, Explanation, Doctor, Posted, Place, Comment, Applied, and Copay. The 'Sales Tax for Transaction 31' row is highlighted with a red box, showing a CPT code of S9999 and a comment 'Sales Tax for Transaction 31 ...'.

TR #	DOS	Thru DOS	Amount	Explanation	Doctor	Posted	Place	Comment	Applied	Copay
24	12/29/2005		\$72.00	99213	DAD	<input type="checkbox"/>	11		\$15.00	\$0.00
25	12/29/2005		\$100.00	99214	DAD	<input type="checkbox"/>	11	Patient seems anxious	\$5.00	\$0.00
31	8/22/2014		\$60.00	99213	DAD	<input type="checkbox"/>	11		\$0.00	\$15.00
32	8/22/2014		\$3.00	S9999	DAD	<input type="checkbox"/>	11	Sales Tax for Transaction 31 ...	\$0.00	\$0.00