

## Entering and Editing a Charge in the Charge- F6 Tab

To create an Insurance Claim for a Patient that has an Insurance Carrier then under the first box on the left, entitled *Policies*, you must select an Insurance Carrier.

The screenshot shows a software window titled "#10002 - Osagbue, Vincent, h: (205)343-0946, 11/25/1978". The main area is divided into several sections:

- Navigation:** Edit - F3, Summary - F5, **Charge - F6**, Payment - F7, Billing - F8, Notes - F9, Transactions - F10.
- Search:** Find 10002 - 3
- Fields:** Name: 7/17/2012 1:03:56 PM, Edit Policies, Edit Managed Care - LESS
- Policies:** A dropdown menu with options: Primary, Secondary, Tertiary, Quaternary. This section is highlighted with a red box.
- Parameters:** Fee Schedule, Facility, Provider (Little, Do - DAD), Referral, UPIN.
- Hospitalization:** From, To.
- Prior Authorizations / CLIA:** Primary, Secondary, Tertiary, Quaternary.
- Patient Conditions Related To:** Employment (No), Situation (Neither), State (NONE), Box 10d.
- Illness:** Type (None), Current, Similar Illness, Qualifier (None).
- Diagnosis Codes:** A, B, C, D, E, F, G, H, I, J, K, L.
- Miscellaneous Items:** Box 11b Other Id, Box 19, Box 20 Lab Fees (0), Recall Date, ICD Code Version (ICD 9).
- Disability:** Extent (None), From, To.
- Filters:**  Include Links,  Auto-Update Box21(Diagnosis Pointers)
- Table:**

DOS	Thru DOS	POS	EMG	Code	M1	M2	M3	M4	CPT Amount	Units	Diag Ptrs /	Amount	EPSDT	Status	Comment
* 12/27/2005		(11) OFFICE		99214	QB				\$100.00	3	A	\$300.00	N		
10/27/2005		(11) OFFICE		99213	QB				\$60.00	1	A	\$60.00	N		
- Record:** 1 of 2
- Buttons:** Professional, Institutional

To enter an uninsured Patient service, then skip the *Policies* box.

Next, going two boxes over, you must select a *Diagnosis Code*. You may enter in a code in section A., a different code in section B., etc.

The screenshot shows a medical billing software interface for patient Vincent Osagbue. The 'Diagnosis Codes' section is highlighted with a red box, showing a list of codes from A to L. Code A is selected with the value '530.81'. Below this, there are several other sections like 'Miscellaneous Items' and 'Disability'. At the bottom, a table displays billing details for two dates in 2005.

DOS	Thru DOS	POS	EMG	Code	M1	M2	M3	M4	CPT Amount	Units	Diag Ptrs /	Amount	EPSDT	Status	Comment
12/27/2005		(11) OFFICE		99214	QB				\$100.00	3	A	\$300.00	N		
10/27/2005		(11) OFFICE		99213	QB				\$60.00	1	A	\$60.00	N		

After this information is entered in, you then move towards the bottom of the screen to enter in the rest of the Charge information. You enter in the new charge in the first line, which should be empty.

#10002 - Osagbue, Vincent, h: (205)343-0946, 11/25/1978

Osagbue, Vincent

Refresh Save Printer Delete Folders Recent Options Alerts Templates Go Back

Edit - F3 Summary - F5 Charge - F6 Payment - F7 Billing - F8 Notes - F9 Transactions - F10

New Find 10002 - 3 Name: 7/17/2012 1:03:56 PM Edit Policies Edit Managed Care - LESS

**Policies**  
 Primary  
 Secondary  
 Tertiary  
 Quaternary

**Parameters**  
 Fee Schedule  
 Facility  
 Provider Little, Do - DAD  
 Referral  
 UPIN

**Hospitalization**  
 From  
 To

**Prior Authorizations / CLIA**  
 Primary  
 Secondary  
 Tertiary  
 Quaternary

**Patient Conditions Related To**  
 Employment No  
 Situation Neither  
 State NONE  
 Box 10d

**Illness**  
 Type None  
 Current  
 Similar Illness  
 Qualifier None

**Diagnosis Codes**  
 A. 530.81  
 B.  
 C.  
 D.

**Diagnosis Codes**  
 E.  
 F.  
 G.  
 H.

**Diagnosis Codes**  
 I.  
 J.  
 K.  
 L.

**Miscellaneous Items**  
 Box 11b Other Id  
 Box 19  
 Box 20 Lab Fees 0  
 Recall Date  
 ICD Code Version ICD 9

**Disability**  
 Extent None  
 From  
 To

Filters  Include Links  Auto-Update Box21(Diagnosis Pointers)

	DOS	Thru DOS	POS	EMG	Code	M1	M2	M3	M4	CPT Amount	Units	Diag Ptrs /	Amount	EPSDT	Status	Comment
*																
▶	12/27/2005		(11) OFFICE		99214	QB				\$100.00	3	A	\$300.00	N		
	10/27/2005		(11) OFFICE		99213	QB				\$60.00	1	A	\$60.00	N		

Record: 1 of 2

Professional Institutional

When entering information into the Charge columns, you can move to the next column over by using the *TAB* key. This can make moving between columns much easier and quicker than clicking on each individual column. Enter in the *Date of Service (DOS)*, *Place of Service (POS)* from the drop down box, *yes (Y)* or *no (N)* for *Emergency (EMG)*, *Procedure Code* from the drop down box under *Codes*, *CPT Amount*, and *Units* number.

The screenshot shows a medical billing application window titled "#10002 - Osagbue, Vincent, h: (205)343-0946, 11/25/1978". The interface includes a menu bar with options like New, Find, Refresh, Save, Printer, Delete, Folders, Recent, Options, Alerts, and Templates. Below the menu bar are tabs for Edit - F3, Summary - F5, Charge - F6 (selected), Payment - F7, Billing - F8, Notes - F9, and Transactions - F10. The main area contains several sections: Policies, Parameters, Hospitalization, Prior Authorizations / CLIA, Patient Conditions Related To, Illness, Diagnosis Codes, Miscellaneous Items, and Disability. At the bottom, there is a table of charges with the following data:

DDS	Thru DOS	POS	EMG	Code	M1	M2	M3	M4	CPT Amount	Units	Diag Ptrs	Amount	EPSDT	Status	Comment
4/23/2014		(11) OFFICE	N	99245					\$100.00	1	A	\$100.00	N	Ready To Send	
10/27/2005		(11) OFFICE		99213	QB				\$60.00	1	A	\$60.00	N		
12/27/2005		(11) OFFICE		99214	QB				\$100.00	3	A	\$300.00	N		

At the bottom of the window, there are buttons for "Professional" and "Institutional".

For the next type-in box of *Diagnostic Pointers* (Diag Ptrs), make sure the letter you type in matched the Diagnostic Code you will need in the *Diagnostic Codes* box.

The screenshot shows a medical software interface for patient #10002 - Osagbue, Vincent. The interface includes a menu bar with options like New, Find, Refresh, Save, Printer, Delete, Folders, Recent, Options, Alerts, and Templates. Below the menu bar are tabs for Edit - F3, Summary - F5, Charge - F6, Payment - F7, Billing - F8, Notes - F9, and Transactions - F10. The main area contains several sections: Policies, Parameters, Hospitalization, Prior Authorizations / CLIA, Patient Conditions Related To, Illness, Diagnosis Codes, Miscellaneous Items, and Disability. A table at the bottom displays charges with columns for DOS, Thru DOS, POS, EMG, Code, M1, M2, M3, M4, CPT Amount, Units, Diag Ptrs, Amount, EPSDT, Status, and Comment. A red box highlights the 'Diagnosis Codes' dropdown menu, and another red box highlights the 'Diag Ptrs' column in the table.

DOS	Thru DOS	POS	EMG	Code	M1	M2	M3	M4	CPT Amount	Units	Diag Ptrs	Amount	EPSDT	Status	Comment
4/23/2014		(11) OFFICE	N	99245					\$100.00	1	A	\$100.00	N	Ready To Send	
10/27/2005		(11) OFFICE		99213	QB				\$60.00	1	A	\$60.00	N		
12/27/2005		(11) OFFICE		99214	QB				\$100.00	3	A	\$300.00	N		

The next type-in box is the Early Periodic Screening, Diagnosis, and Treatment (EPSDT). You can leave this field blank, or you can type in Y, N, 1, 2, 3, or 4 – whichever suits your information needs. Then use the drop down box in the next column, entitled *Status*.

The screenshot shows a medical software interface with a menu bar at the top containing options like New, Find, Refresh, Save, Printer, Delete, Folders, Recent, Options, Alerts, and Templates. Below the menu bar are tabs for Edit - F3, Summary - F5, Charge - F6, Payment - F7, Billing - F8, Notes - F9, and Transactions - F10. The main area contains several sections with dropdown menus: Policies, Parameters, Hospitalization, Prior Authorizations / CLIA, Patient Conditions Related To, Illness, Diagnosis Codes, Miscellaneous Items, and Disability. Below these sections is a table with the following data:

DOS	Thru DOS	POS	EMG	Code	M1	M2	M3	M4	CPT Amount	Units	Diag Ptrs	Amount	EPSDT	Status	Comment
4/23/2014		(11) OFFICE	N	99245					\$100.00	1	A	\$100.00	N	Ready To Send	
10/27/2005		(11) OFFICE		99213	QB				\$60.00	1	A	\$60.00	N		
12/27/2005		(11) OFFICE		99214	QB				\$100.00	3	A	\$300.00	N		

At the bottom of the interface, there are radio buttons for "Professional" and "Institutional".

Once finished with the new Charge, **MAKE SURE TO PRESS ENTER**. Once you press ENTER, the Charge should drop down to the grid below.

#10002 - Osagbue, Vincent, h: (205)343-0946, 11/25/1978

Osagbue, Vincent

Refresh Save Printer Delete Folders Recent Options Alerts Templates Go Back

Edit - F3 Summary - F5 **Charge - F6** Payment - F7 Billing - F8 Notes - F9 Transactions - F10

New Find 10002 - 3 Name: 7/17/2012 1:03:56 PM Edit Policies Edit Managed Care - LESS

**Policies**  
 Primary  
 Secondary  
 Tertiary  
 Quaternary

**Parameters**  
 Fee Schedule  
 Facility  
 Provider Little, Do - DAD  
 Referral  
 UPIN

**Hospitalization**  
 From  
 To

**Prior Authorizations / CLIA**  
 Primary  
 Secondary  
 Tertiary  
 Quaternary

**Patient Conditions Related To**  
 Employment No  
 Situation Neither  
 State NONE  
 Box 10d

**Illness**  
 Type None  
 Current  
 Similar Illness  
 Qualifier None

**Diagnosis Codes**  
 A. 530.81  
 B.  
 C.  
 D.

**Diagnosis Codes**  
 E.  
 F.  
 G.  
 H.

**Diagnosis Codes**  
 I.  
 J.  
 K.  
 L.

**Miscellaneous Items**  
 Box 11b Other Id  
 Box 19  
 Box 20 Lab Fees 0  
 Recall Date  
 ICD Code Version ICD 9

**Disability**  
 Extent None  
 From  
 To

Filters  Include Links  Auto-Update Box21(Diagnosis Pointers)

DOS	Thru DOS	POS	EMG	Code	M1	M2	M3	M4	CPT Amount	Units	Diag Ptrs	Amount	EPSDT	Status	Comment
* 4/23/2014		(11) OFFICE	N	99245					\$100.00	1	A	\$100.00	N	Ready To Send	
10/27/2005		(11) OFFICE		99213	QB				\$60.00	1	A	\$60.00	N		
12/27/2005		(11) OFFICE		99214	QB				\$100.00	3	A	\$300.00	N		

Record: 1 of 3

Professional Institutional

After pressing ENTER, **YOU MUST CLICK SAVE** at the top of the screen. If you do not click *Save*, the Charge will not be added and you will lose the information you just entered.

#10002 - Osagbue, Vincent, h: (205)343-0946, 11/25/1978

Osagbue, Vincent

Refresh Save Printer Delete Folders Recent Options Alerts Templates

Go Back

Edit - F3 Summary - F5 **Charge - F6** Payment - F7 Billing - F8 Notes - F9 Transactions - F10

Name: 7/17/2012 1:03:56 PM Edit Policies Edit Managed Care - LESS

**Policies**

Primary Secondary Tertiary Quaternary

**Parameters**

Fee Schedule Facility Provider Little, Do - DAD Referral UPIN

**Hospitalization**

From To

**Prior Authorizations / CLIA**

Primary Secondary Tertiary Quaternary

**Patient Conditions Related To**

Employment No Situation Neither State NONE Box 10d

**Illness**

Type None Current Similar Illness Qualifier None

**Diagnosis Codes**

A. 530.81 B. C. D. E. F. G. H. I. J. K. L.

**Miscellaneous Items**

Box 11b Other Id Box 19 Box 20 Lab Fees 0 Recall Date ICD Code Version ICD 9

**Disability**

Extent None From To

Filters  Include Links  Auto-Update Box21(Diagnosis Pointers)

DOS	Thru DOS	POS	EMG	Code	M1	M2	M3	M4	CPT Amount	Units	Diag Ptrs	Amount	EPSDT	Status	Comment
* 4/23/2014		(11) OFFICE	N	99245					\$100.00	1	A	\$100.00	N	Ready To Send	
10/27/2005		(11) OFFICE		99213	QB				\$60.00	1	A	\$60.00	N		
12/27/2005		(11) OFFICE		99214	QB				\$100.00	3	A	\$300.00	N		

Record: 1 of 3

Professional Institutional



To Edit a Charge, simply click on the existing Charge you wish to edit. Then click on the column or columns that need to be edited and enter in the new information.

The screenshot shows a medical billing software window titled "#10002 - Osagbue, Vincent, h: (205)343-0946, 11/25/1978". The interface includes a menu bar with options like New, Find, Refresh, Save, Printer, Delete, Folders, Recent, Options, Alerts, and Templates. Below the menu bar are tabs for Edit - F3, Summary - F5, Charge - F6, Payment - F7, Billing - F8, Notes - F9, and Transactions - F10. The main area contains several sections: Policies, Parameters, Hospitalization, Prior Authorizations / CLIA, Patient Conditions Related To, Illness, Diagnosis Codes, Miscellaneous Items, and Disability. At the bottom, there is a table with columns: DDS, Thru DDS, POS, EMG, Code, M1, M2, M3, M4, CPT Amount, Units, Diag Ptrs, Amount, EPSDT, Status, and Comment. A red dashed box highlights the 'Code' column for the row dated 4/23/2014, where the value '99245' is selected. Below the table, there are navigation controls and a record indicator showing '1 of 3' records. At the bottom of the window, there are two buttons labeled 'Professional' and 'Institutional'.

DDS	Thru DDS	POS	EMG	Code	M1	M2	M3	M4	CPT Amount	Units	Diag Ptrs	Amount	EPSDT	Status	Comment
		(11) OFFICE	N	99245					\$100.00	1	A	\$100.00	N	Ready To Send	
		(11) OFFICE		99215	QB				\$60.00	1	A	\$60.00	N		
		(11) OFFICE		99214	QB				\$100.00	3	A	\$300.00	N		

Once you make the edits then **MAKE SURE TO PRESS ENTER AND CLICK SAVE.** If you do not click either or both ENTER and SAVE, the information that had been edited will not be saved.

The screenshot shows a medical billing software window titled "#10002 - Osagbue, Vincent, h: (205)343-0946, 11/25/1978". The top toolbar contains buttons for New, Find, Refresh, Save (highlighted with a red box), Printer, Delete, Folders, Recent, Options, Alerts, and Templates. Below the toolbar are tabs for Edit - F3, Summary - F5, Charge - F6 (selected), Payment - F7, Billing - F8, Notes - F9, and Transactions - F10. The main area contains several sections with dropdown menus: Policies, Parameters, Hospitalization, Prior Authorizations / CLIA, Patient Conditions Related To, Illness, Diagnosis Codes (A-L), Miscellaneous Items, and Disability. At the bottom, there is a table with the following data:

DOS	Thru DOS	POS	EMG	Code	M1	M2	M3	M4	CPT Amount	Units	Diag Ptrs	Amount	EPSDT	Status	Comment
4/23/2014		(11) OFFICE	N	99245					\$100.00	1	A	\$100.00	N	Ready To Send	
10/27/2005		(11) OFFICE		99213	QB				\$60.00	1	A	\$60.00	N		
12/27/2005		(11) OFFICE		99214	QB				\$100.00	3	A	\$300.00	N		

Record: 1 of 3

Professional Institutional