Send Charges to Practice Manager

The manner in which charges and procedures are entered and synchronized with Practice Manager allows you the opportunity to attach up to five ICD10 and/or five ICD9 diagnosis codes as well as four modifiers with a procedure. Likewise, you have the option to select the number of Billable Units for each procedure. In addition, you can also add or modify the Provider, Referring Physician (Referral), or the Facility in the corresponding fields. This allows the billing process to be more clear and efficient within Practice Manager. Use the following steps to send applicable charge information to Practice Manager.

1. While in the patient's note, click **Note > Charge Items**.

2. In the Charge Items screen make sure the information is correct, modify the **Provider**, **Referral**, **Facility**, and/or **Billable Units** as needed. See Figure 1.

   NOTE: If the Practice is incorrect, you will need to modify the applicable practice in the Chart Header of the applicable chart note, prior to sending the applicable charges. Once the appropriate practice and case have been updated in the Chart Note, the Charge Items dialog will be automatically updated with the correct practice information.

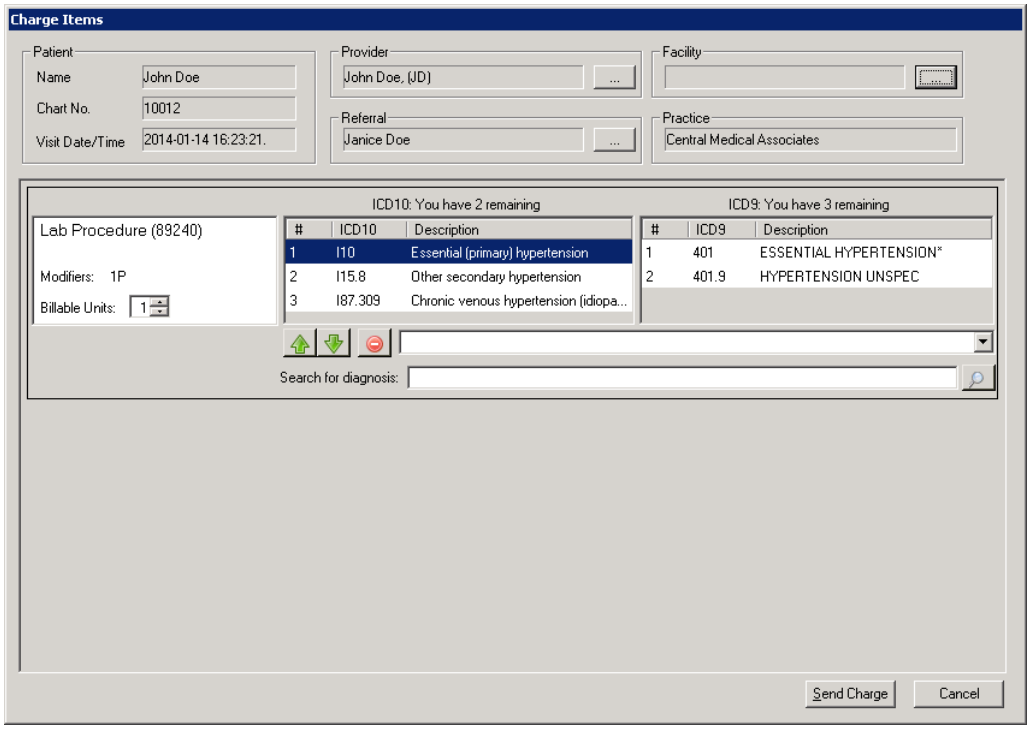
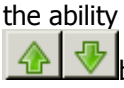


Figure 1 – Charge Items

3. In the Diagnosis area the diagnoses that were attached to the procedure will be listed, as well as the number of ICD10 and ICD9 code remaining that can be added to the procedure.

   You have the ability to change the position of a diagnosis code by highlighting the applicable code and then using the  buttons.

You can remove a diagnosis from the procedure by highlighting the diagnosis code you want to remove, and then clicking the button.

Or, if there are remaining diagnoses you can search for a diagnosis by typing a few letters of the diagnosis in the Search for diagnosis: field, and then clicking the Lookup button.

You will then access the Diagnosis Search dialog where you can perform an **ICD10 Search**, an **ICD9 Search**, as well as utilize the **Crosswalk** functionality which allows you enter an ICD9 code and then the system will return the applicable ICD10 code(s) that match that initial ICD9 code.

When performing an ICD10 Search or using the Crosswalk options, the dialog will also contain a tree view (middle column) of the selected diagnosis, as well as a detail pane (right column) that further details the diagnosis.

Once the applicable diagnosis is located, you can highlight that diagnosis, and then click the **OK** button.

To perform an ICD10 Search, be sure that the **ICD10 Search** option is selected above, then select the applicable **Search Column** and **Search Type**, and then begin typing the diagnosis you want to add in the Description field. See Figure 2. The system will return conditions that match that description for the Search Column and Search Type selected.

Once the applicable codes has been located, highlight that code in the left column, and the applicable code will become highlighted in the diagnostic tree in the middle column, and the right column will display detailed information regarding the selected diagnosis. To add that code, click the **OK** button.

NOTE: You also have the ability to search for specific codes via the diagnosis tree in the middle column. Likewise, when performing an ICD10 Search, you are able to hide the left and right columns as needed by clicking the and buttons.

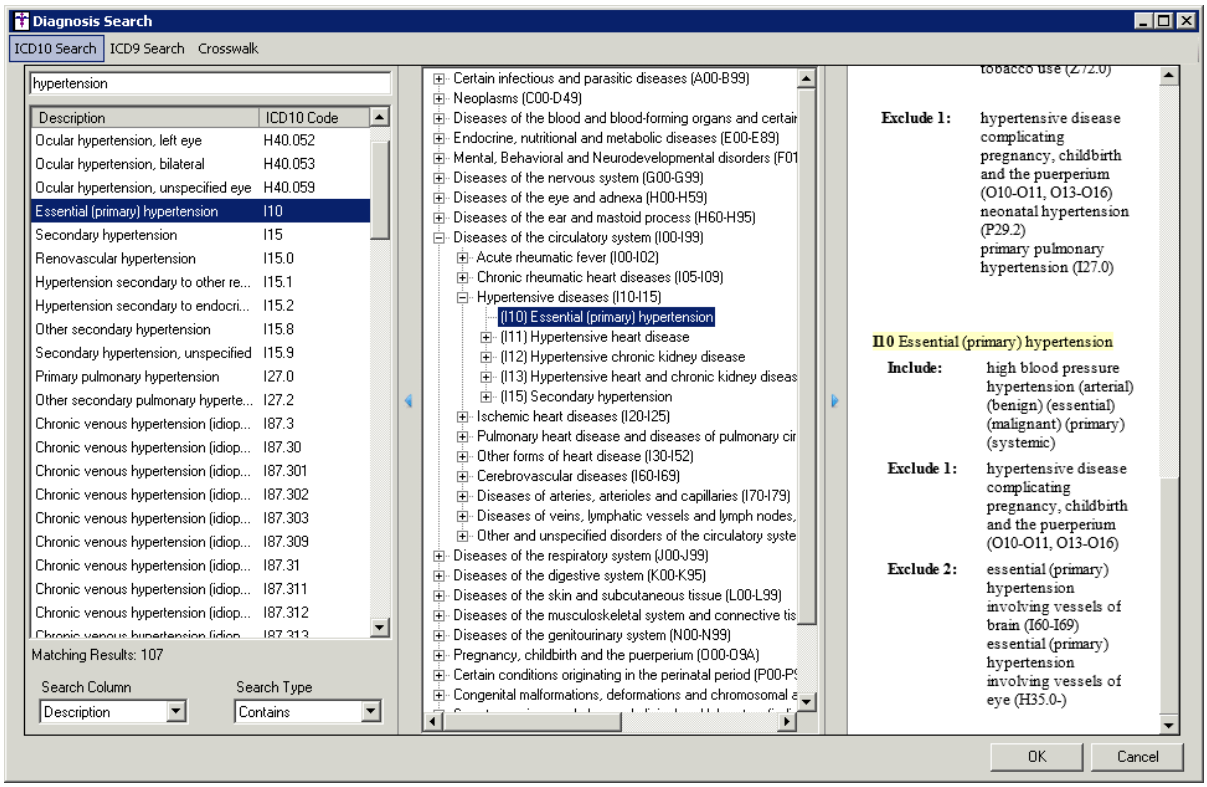


Figure 2 – Diagnosis Search – ICD10 Search

To perform an ICD9 Search, be sure that the **ICD9 Search** option is selected above, then select the applicable **Search Column** and **Search Type**, and then begin typing the diagnosis you want to add in the Description field. See Figure 3. The system will return conditions that match that description for the Search Column and Search Type selected.

Once the applicable codes has been located, highlight that code, and then click the **OK** button.

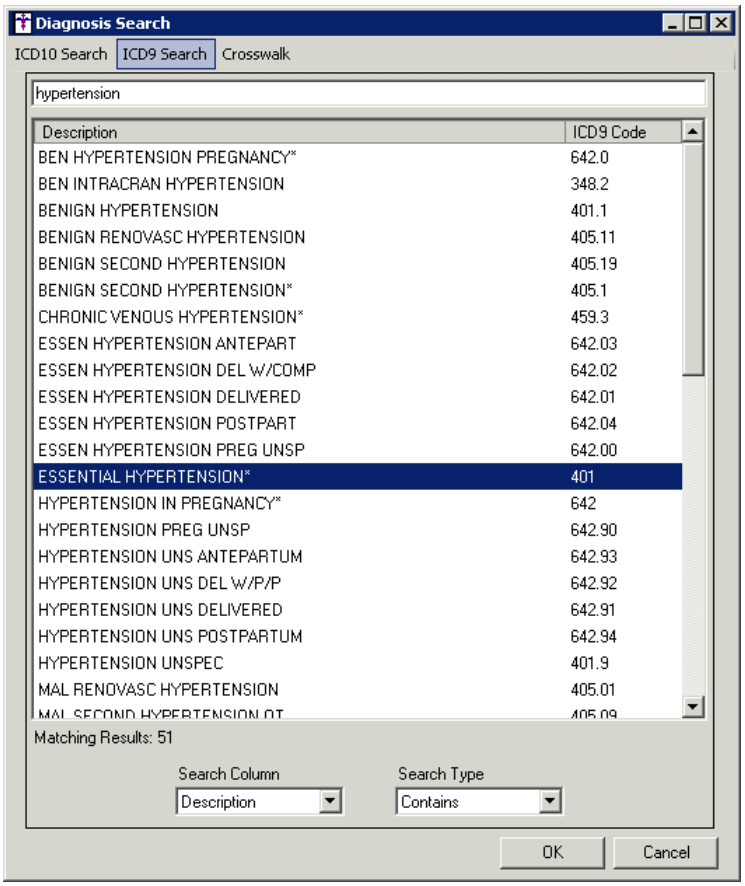


Figure 3 – Diagnosis Search – ICD9 Search

To use the Crosswalk option, be sure that the **Crosswalk** option is selected above, and then enter the specific **ICD9 Code** you would like to match to an applicable ICD10 code. The system will return ICD10 codes that match that ICD9 code.

Once the applicable code has been located, highlight that code in the left column, and the applicable code will become highlighted in the diagnostic tree in the middle column, and the right column will display detailed information regarding the selected diagnosis. To add that code, click the **OK** button.

NOTE: Similar to the ICD10 Search, you also have the ability use the the diagnosis tree in the middle column to locate specific diagnosis codes. Likewise, when using the Crosswalk, you are able to hide the left and right columns as needed by clicking the and buttons.

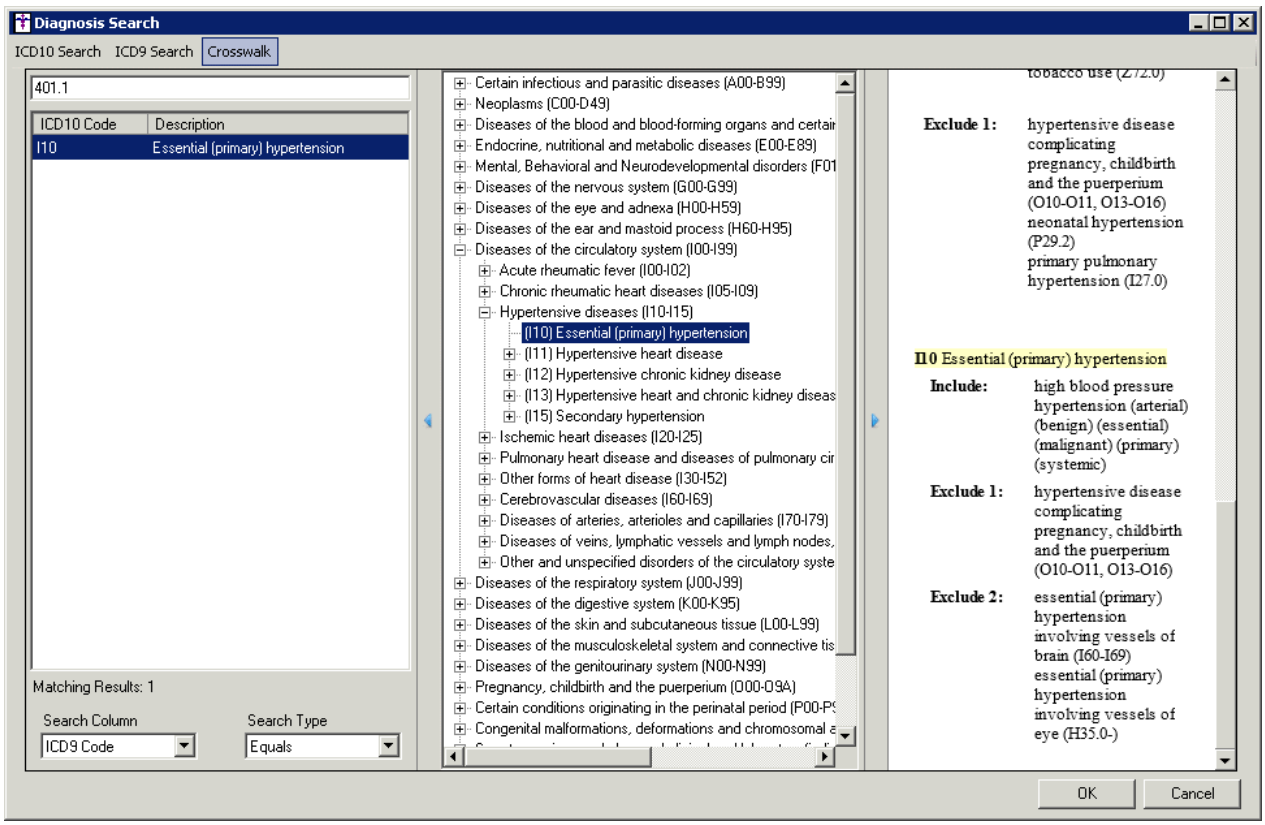


Figure 4 – Diagnosis Search – Crosswalk

4. Once all of the charge information appears as desired, click the **Send Charge** button. This will then transfer the charge information to Practice Manager.