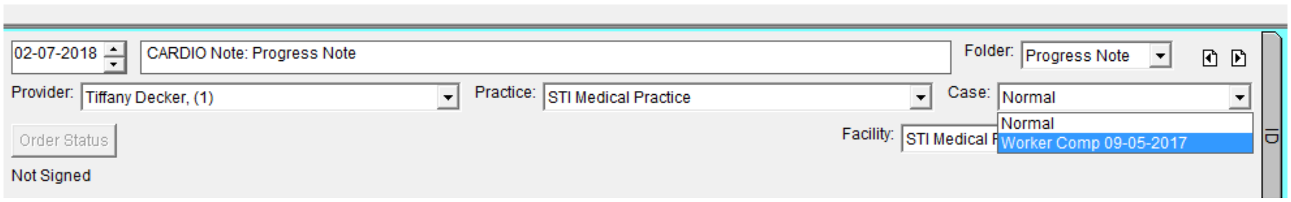
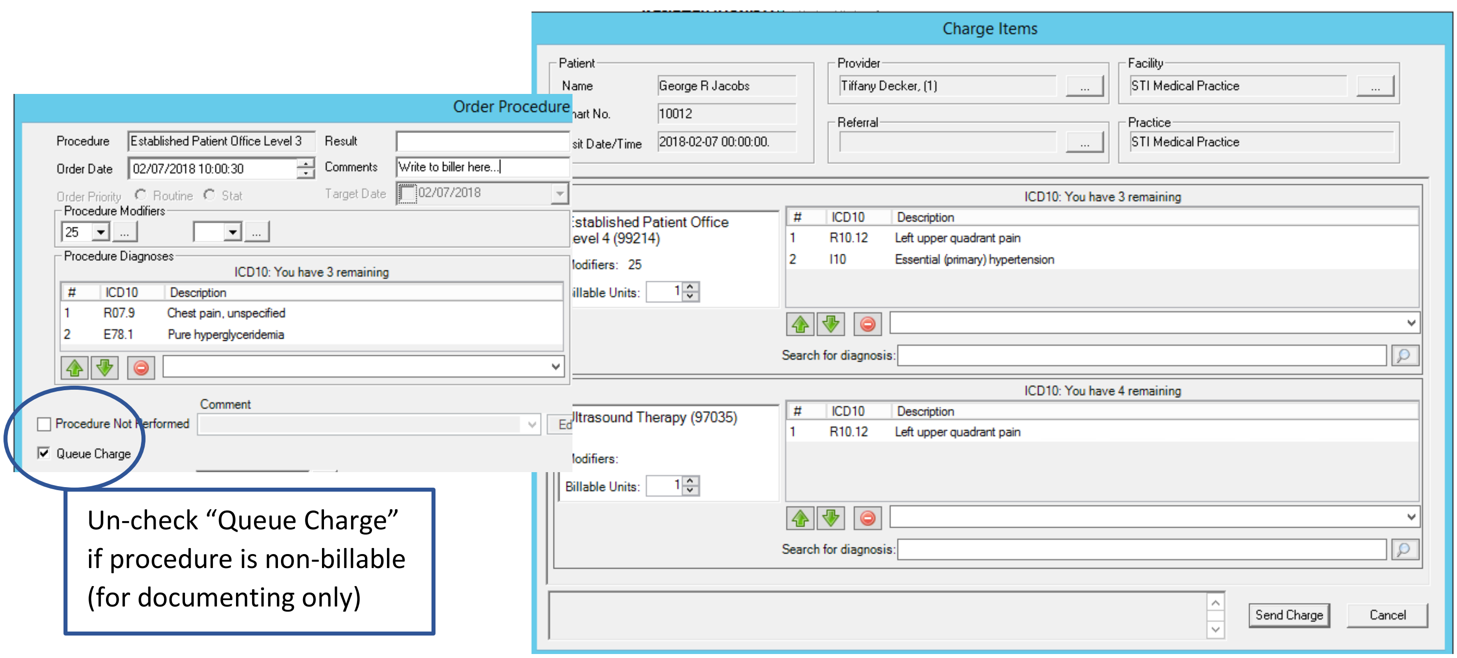
Sending Charges
From Clinical to Practice Manager

In the Clinical Progress Note:

1. Header of Clinical note – **set Practice, Case and Facility** for this patient visit

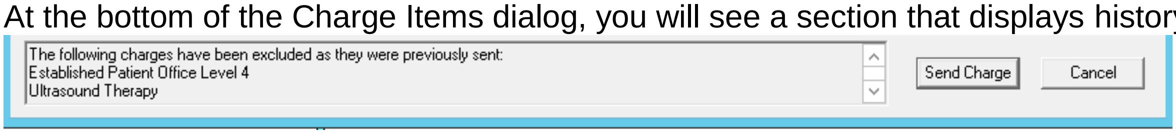


2. Select the appropriate diagnosis(es) in note
3. Select the appropriate procedure/office code(s) and select which dx goes with it
   NOTE: Modifiers can be selected in this dialog – use the "…" ellipse icon
4. Go to Note (top tool bar) > Charge Items…
5. Confirm the information is correct – what you send is what gets billed to insurances.
6. Click "**Send Charge**"
   NOTE: The note must be unsigned to send charges. If you complete the process of sending charges and then add another procedure to your progress note, you will be able to send the additional charge without sending the original charge(s) as duplicates.



To View Sent Charges:

1. Open the progress note in question and unsign it, if necessary
2. Go to **Note > Charge Items…**
3. At the bottom of the Charge Items dialog, you will see a section that displays history

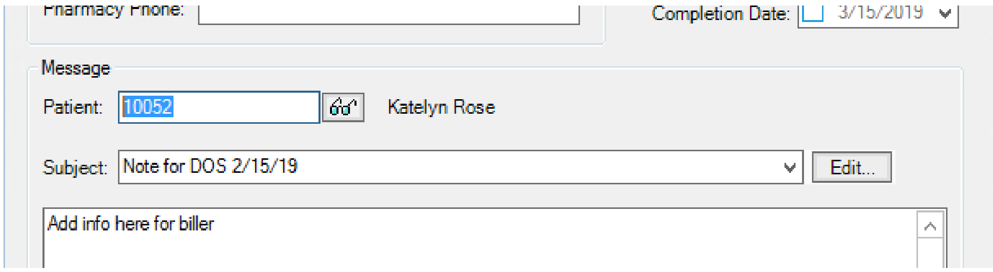


VIDEOS: Using ChartMaker Clinical to send over charges

https://www.youtube.com/playlist?list=PL5fq2BdprmO-6q_4Sp18zZ901Ga35qVNp

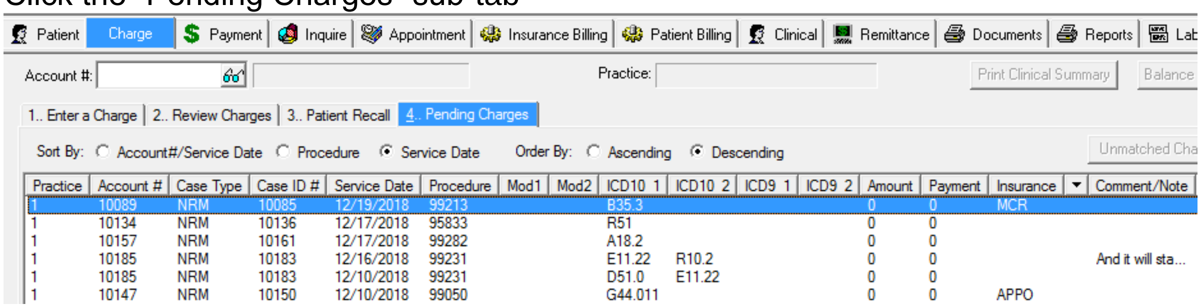
Extra Message to Biller:

Use the “To-Do”, New Message/Task option to write message to biller – be sure to attach patient name to the message.   Messages show in both ChartMaker Clinical and Practice Manager.



Processing Charges in Practice Manager:

1. Go to the Charge tab
2. Click the “Pending Charges” sub-tab



3. (Optional) Search for the patient
   TIP: You may have to click “Refresh” to see a recently sent charge.
4. Double-click the charge you would like to process
5. Confirm all the information is correct and click “Save”

   NOTE: At this point the charge will be put in the billing queue and taken out of the Pending Charges queue.

Practice Manager Reports:

- Lists > Charge > Pending Charges
- Appointments > Appointment Lists > Appointment Reconciliation
  Note: The “Reconciliation Status” will still show as “No Charges Entered” even if there is a Pending Charge so you cannot solely use this report to reconcile your appointments/charges.