



## 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

02-07-2018 | CARDIO Note: Progress Note | Folder: Progress Note

Provider: Tiffany Decker, (1) | Practice: STI Medical Practice | Case: Normal

Order Status: Not Signed | Facility: STI Medical Practice | Worker Comp 09-05-2017

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.

**Charge Items**

Patient Name: George R Jacobs | Provider: Tiffany Decker, (1) | Facility: STI Medical Practice

Procedure: Established Patient Office Level 3 | Result: | Chart No.: 10012 | Visit Date/Time: 2018-02-07 00:00:00

Order Date: 02/07/2018 10:00:30 | Comments: Write to biller here... | Target Date: 02/07/2018

Procedure Modifiers: [25] | Procedure Diagnoses:

#	ICD10	Description
1	R07.9	Chest pain, unspecified
2	E78.1	Pure hyperglycemia

ICD10: You have 3 remaining

Procedure: Ultrasound Therapy (97035) | Modifiers: | Billable Units: 1

#	ICD10	Description
1	R10.12	Left upper quadrant pain
2	I10	Essential (primary) hypertension

ICD10: You have 4 remaining

Procedure Not Performed |  Queue Charge

Comment: | Ed

Send Charge | Cancel

Un-check “Queue Charge” if procedure is non-billable (for documenting only)

### 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

The following charges have been excluded as they were previously sent:

- Established Patient Office Level 4
- Ultrasound Therapy

Send Charge | Cancel

## VIDEOS: Using ChartMaker Clinical to send over charges

[https://www.youtube.com/playlist?list=PL5fq2BdprmO-6q\\_4Sp18zZ901Ga35qVNp](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.

A screenshot of a web-based message form. At the top, there is a field for "Pharmacy Phone:" and a "Completion Date:" dropdown menu set to "3/15/2019". Below this is a "Message" section with a "Patient:" field containing "10052" and a name "Katelyn Rose". The "Subject:" field contains "Note for DOS 2/15/19" and has an "Edit..." button. At the bottom, there is a text area labeled "Add info here for biller" with an upward-pointing arrow.

### Processing Charges in Practice Manager:

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

A screenshot of the "Pending Charges" sub-tab in Practice Manager. The interface includes a navigation bar with tabs for Patient, Charge, Payment, Inquire, Appointment, Insurance Billing, Patient Billing, Clinical, Remittance, Documents, Reports, and Lab. Below the navigation bar, there are fields for "Account #:" and "Practice:". A progress indicator shows four steps: 1. Enter a Charge, 2. Review Charges, 3. Patient Recall, and 4. Pending Charges (highlighted). Below the progress indicator, there are sorting options: "Sort By:" with radio buttons for "Account#/Service Date", "Procedure", and "Service Date", and "Order By:" with radio buttons for "Ascending" and "Descending". A table of pending charges is displayed with columns: Practice, Account #, Case Type, Case ID #, Service Date, Procedure, Mod1, Mod2, ICD10 1, ICD10 2, ICD9 1, ICD9 2, Amount, Payment, Insurance, and Comment/Note. The table contains several rows of data, including charges for account 10089 and 10134.

Practice	Account #	Case Type	Case ID #	Service Date	Procedure	Mod1	Mod2	ICD10 1	ICD10 2	ICD9 1	ICD9 2	Amount	Payment	Insurance	Comment/Note
	10089	NRM	10085	12/19/2018	99213			B35.3				0	0	MCR	
1	10134	NRM	10136	12/17/2018	95833			R51				0	0		
1	10157	NRM	10161	12/17/2018	99282			A18.2				0	0		
1	10185	NRM	10183	12/16/2018	99231			E11.22	R10.2			0	0		And it will sta...
1	10185	NRM	10183	12/10/2018	99231			D51.0	E11.22			0	0		
1	10147	NRM	10150	12/10/2018	99050			G44.011				0	0	APPO	

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.