



Sending Charges from Clinical to Practice Manager

In the Clinical Progress Note:

1. Select the appropriate diagnosis(es)
2. Select the appropriate procedure/office code(s)

NOTE: Modifiers must be selected in this dialog, if necessary.

3. Go to Note > Charge Items...
4. Confirm the information is correct

NOTE: You can modify the Provider, Referral, Facility, Units or Diagnosis from here. However, you cannot change the Modifier.

5. Click "Send Charge"

NOTE: The note must be unsigned in order to send charges. You can only send a charge for an individual procedure once in a progress note. 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 any charges previously sent

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.