

Billing Cheat Sheet – Entering Claims

You can access billing from three areas.

- The Patient's Encounter template
- The Patient's Start/Open menu on the top right when viewing a patient chart
- Visit module on the left-hand menu

1. Encounter Template

- When you select Insured Billing you will be presented with the following screen.

The screenshot shows the 'Edit PEI Billing Item' form. The 'Billing Screen' callout points to the main form fields: CODE/DESCRIPTION (No code selected), BASE AMOUNT (CA \$ 0.00), COUNT (1), ROLE (Select One...), DIAGNOSIS CODES (Search), SERVICE DATE (10/21/2021), TIME SPENT (MINUTES), START TIME (04:16 AM), FINISH TIME, FACILITY TYPE (OFFICE), FACILITY (Queen Elizabeth Hospital), and checkboxes for Referred By, Referred To, and Show Advanced Fields. The 'Selecting checkboxes' callout points to the 'Referred By' and 'Referred To' sections, which include NAME and NUMBER fields with search icons. The 'Selecting Edit Comment button' callout points to the 'Edit Comment' button in the 'Advanced Fields' section. A separate 'Comment' dialog box is shown on the right, with a text input field and 'Cancel' and 'Update' buttons.

- Code Description – as you begin typing the code or text, a drop down will appear to select the appropriate code
- Role will populate for the user (if not, it must be selected)
- Diagnosis Codes - as you begin typing the code or text, a drop down will appear to select the appropriate code
- Service Date will default to the current date – it can be updated if necessary
- Start Time entered and Time Spent (minutes) entered will populate the Finish Time – depending on the rules, you may be required to enter this
- Facility Type and Facility will need to be selected for a few days, then it will default for the user for every bill. If the Patient is being seen another location, these will need to be updated. CHR allows for default values, but it will default for all claims, thus the reason it will need to be updated.
- The checkboxes at the bottom of the screen, allow users to access additional field that may be required depending on the Fee Code.

- Entering comments is accessed by Selecting (Show Advanced Fields, Edit Comment)
 - o *Note: this has been identified as an area to improve – we are working to make the comments easier to enter without multiple clicks
- Once the screens are complete, click outside the form to close it.
- To edit or delete the claim, click on the claim and update or click on the garbage can on the top right of the screen

The screenshot shows a web form titled "Edit PEI Billing Item". In the top right corner of the form, there is a trash can icon, which is circled in red. Below the title bar, there are several input fields and sections:

- A section labeled "CODE / DESCRIPTION" with a text input field containing "No code selected".
- A section labeled "BASE AMOUNT" with a currency selector set to "CA \$" and a value of "0.00".
- A section labeled "COUNT" with a value of "1".
- A checkbox labeled "Override Calculations" which is currently unchecked.
- A section labeled "ROLE" with a dropdown menu.

Partial text from the surrounding page is visible: "allow-" on the left and "No au" on the right.

2. Start/Open Menu

- From the Start/Open menu select Insured Billing
- The Patients complete list of Insured Payment are listed
- Select New Payment on the top right

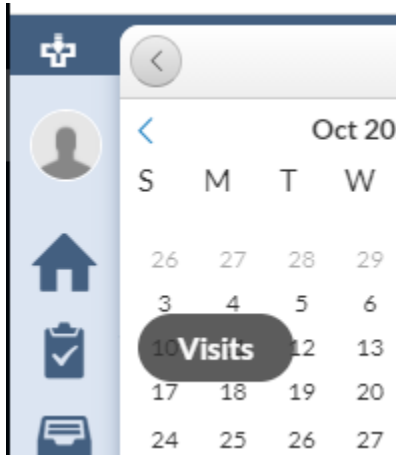
Note: The Clinic Site ID, Provider ID, Specialty will be populated once the updates are complete. If they are not populated, contact an EMR Advisor.

If a Practitioner is logged in, the name will be populated automatically, otherwise it will need to be selected by clicking on the name.

The screenshot shows a 'New Insured Payment' form. At the top, the title 'New Insured Payment' is displayed. Below the title, there is a 'STATUS' dropdown menu set to 'Draft'. Underneath, there are two dropdown menus: 'LOCATION' set to 'Default' and 'PAYMENT ISSUER' set to 'Health PEI'. The form is divided into three sections: 'PATIENT / IDENTIFICATION' showing 'Mr. Kings Oncall' with a '123' icon and 'PE 01530963'; 'BILLING PRACTITIONER' showing 'Dr. Bobby Physician via Health PEI' with a red 'X - click here' annotation; and 'SERVICE DATE' set to '2021/Oct/21'. Below these sections, there is a field for 'CLINIC SITE ID 991245 PROVIDER ID 123 SPECIALTY EMERGENCY MEDICINE'. At the bottom, there is a table with columns for 'STATUS', 'CODE', 'DESCRIPTION', 'BILLED', and 'PAID'. A button labeled '+ Add Fee Item' is located at the bottom left of the table, and a refresh icon is at the bottom right.

Note: the service date on this screen should remain as is, if needed to edit, change as noted earlier
Select Add Fee Item and you will be presented with the same screen as the Encounter.

3. Billing from the Visits Tab (clipboard icon) on the left-hand side.

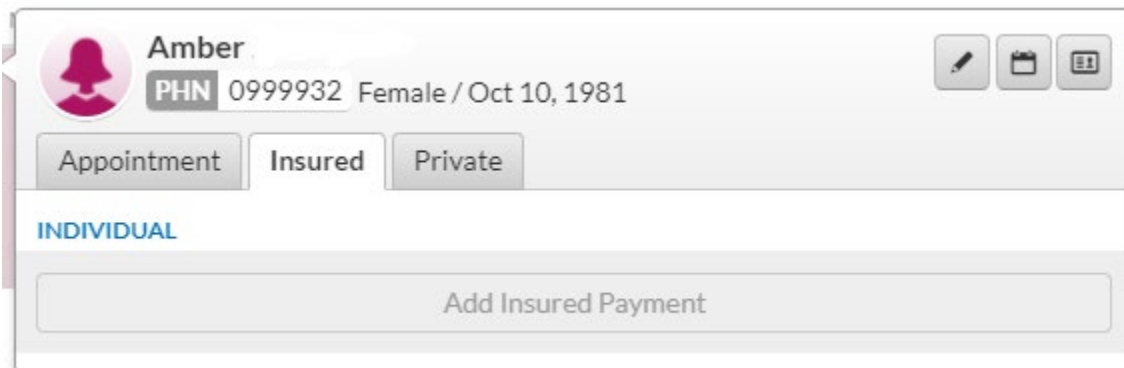


This presents a view of the Day Sheet of Patients that are scheduled for the Provider on a given day. For these patients to show up they must be added to the schedule. Note: if a Provider sees a patient and does not add them to the schedule, they won't show up under visits tab.

To access the billing functionality, click on the Insured Column for the Appointment



When the screen appears, select Add Insured Payment



Complete the form as described during the Encounter.