

Entering a Service Date in CHR billing

Purpose: The following document details how to enter the service date in CHR when completing billing from the Start/Open > Insured Billing screen. This does not apply when completing a bill from the Encounter.

The following screen is displayed after selecting Start/Open > Insured Billing. There is a service date displayed on here. Leave this as is.

The screenshot shows a web-based form titled "New Insured Payment". At the top, there are window control buttons (minimize, maximize, close). The form is divided into several sections:

- STATUS:** A dropdown menu showing "Draft".
- LOCATION:** A dropdown menu showing "Default".
- PAYMENT ISSUER:** A dropdown menu showing "Health PEI".
- PATIENT / IDENTIFICATION:** Displays a patient profile for "Ms. Lori Bloom" with a PEI number of 30810469.
- BILLING PRACTITIONER:** Displays a profile for "Mr. Blair Frizzell" with the note "No Billing Provider Selected".
- SERVICE DATE:** A field containing "2021/Aug/27", which is circled in red.
- CLINIC, SITE ID, PROVIDER ID, SPECIALTY:** A row of input fields, with "SPECIALTY" set to "Select One ...".
- Table:** A table with columns for "STATUS", "CODE", "DESCRIPTION", "BILLED", and "PAID". Below the table is an "Add Fee Item" button.
- INTERNAL NOTES:** A large empty text area for notes.
- Footer:** "Close" and "Save" buttons.

After selecting Add Fee Code you are presented with the following screen. You'll notice a Service Date on the Add Fee Item screen. If the Service Date needs to be edited, it is to be edited here. The Service Date on this form is submitted to Medicare as part of the claim.

The screenshot shows the 'Edit PEI Billing Item' form. The 'SERVICE DATE' field is circled in red and contains the date '08/27/2021'. Other fields include 'CODE / DESCRIPTION' (No code selected), 'BASE AMOUNT' (CA \$ 0.00), 'COUNT' (1), 'ROLE' (Select One...), 'DIAGNOSIS CODES' (Search), 'TIME SPENT (MINUTES)', 'START TIME' (09:31 AM), 'FINISH TIME' (--:-- --), 'FACILITY TYPE' (Select One...), 'FACILITY' (Select One...), and checkboxes for 'Referred By', 'Referred To', and 'Show Advanced Fields'.

A few things to note on the two Service dates:

1. When searching for claims in the billing module, the Service Date on the first screen is used
2. If you update the Service Date on the first screen in error and there is a claim already created, the service date is updated on the Claim automatically