

Create Superbills

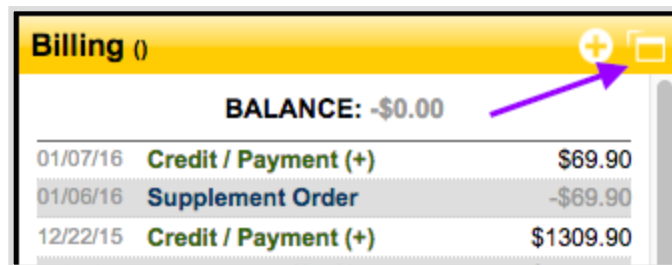
PURPOSE

1. Address patient requests promptly.
2. Move requests quickly and efficiently through the flow of the practice.

PROCEDURE

Expected time frame: As requested.

1. Open the patient's chart.
2. Expand the yellow Billing box by clicking on the squares in the top right corner (shown by the purple arrow below):



3. Place a checkmark next to each item you want to include in the superbill. *Important note:* Superbills must be created per each date of service and cannot include supplements or admin fees.
4. From the drop-down menu in the top right corner, select "create insurance invoice."
5. At the bottom, select the correct clinician from the drop-down menu:



6. Read over the document to make sure that no adjustments are needed:
 - All items should line up (prices in the right column should be in line per item with those on the right, as should the dx codes and the problem/complaint). Please see the incorrect example below; two examples are outlined in purple.
 - CPT codes should have commas between them. Please see the incorrect example below; an example is outlined in blue.
 - CPT code quantifiers must be after the CPT code, not listed altogether at the end (which is how the system defaults). Please see the incorrect example below; an example is outlined in orange.

INCORRECT EXAMPLE:

CPT Code & Description	Charge
82136 82544-x4 x3 : DD Methylation Profile	\$205.00
82492 87046 87045 83993 87328 87177 87209 82656 89125 87329 83631 85549 89160 82272 89160 87102	\$345.00
82986 83516-x4 x3 x3 DD CSAP x3	\$317.00
82274 87081 87106 87101 82270 87177 87337 87329 87328 87324 87338-x4 : BioHealth #401H	\$166.00
82530 82627-x2 x2 : BioHealth #201	\$595.00
99205: New Patient Complex (90 min)	
	TOTAL:
	\$1628.00

Problem/Complaint	Code
DX - Seizures, convulsions, other	780.39
DX - Neuropathy, poly-, unspec.	(ICD9)
DX - Vibration	357.9 (ICD9)
DX - Urinary frequency	E92.82
DX - Ankylosing spondylitis	(ICD9)
DX - Pain in joint involving ankle and foot	788.41
DX - Bartonellosis	(ICD9)
DX - Cognitive impairment, mild	720.0 (ICD9)
DX - Depressive disorder, NOS	719.47
DX - Babesiosis	(ICD9)
DX - Fatigue and malaise, other	088.0 (ICD9)
DX - Lyme disease	331.83
	(ICD9)
	311 (ICD9)
	088.82
	(ICD9)
	780.79
	(ICD9)
	088.81
	(ICD9)

CORRECT EXAMPLE:

CPT Code & Description	Charge
82136 x4, 82544 x3: DD Methylation Profile	\$205.00
82492 x5, 87046, 87045, 83993 x2, 87328, 87177 x3, 87209 x3, 82656, 89125, 87329, 83631, 85549 x2, 89160 x3, 82272, 87102, 82986, 83516: DD CSAP x3	\$345.00
82274, 87081, 87106, 87101, 82270, 87177 x4, 87337, 87329, 87328, 87324, 87338: BioHealth #401H	\$317.00
82530 x2, 82627 x2: BioHealth #201	\$166.00
99205: New Patient Complex (90 min)	\$595.00
	TOTAL:
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- Click on "print form" and save the PDF to your temporary patient folder. Leave the default file name, but add "DOS m-dd-yy" to the end.

Example: Insurance Invoice for John Doe DOS 5-2-15

- Close the invoice and the Billing box.
- In the orange tabbed section at the bottom of the Patient Dashboard, click the "+" to add the superbill.
- Choose the file from your temporary patient folder.
- Leave the title of the superbill from above.
- Type of Document: invoices.
- Should it be filed under the appropriate tab: file it.
- Patient Notification: leave to default (notification not needed).
- Does not need to be reviewed by doctor.

16. Allow the patient to see in their portal account.
17. Do not add document to PMH.
18. Click “Upload Document.”
19. Delete the file from your temporary patient folder.
20. Depending on where the request originated, you need to let the patient know the superbill is ready:

If the request came from the PPQ:

1. In the PPQ, click  to respond to the patient with a message that instructs them where to find the document. For example:

Hi [*patient name*],

Please go to the Labs and Documents section of your Patient Portal, then select the Invoices tab in the blue box on the bottom left to see the requested insurance invoice for date of service [XXXX].

[*your signature*]

If the request was noted in the Admin Notes of an encounter:

1. In the invoices tab, click to open a preview of the document.
2. Underneath “notify patient” on the right click “notify by portal.”
 1. In the “send notice about the document via portal” box, type a message to the patient that instructs them where to find the document. For example:

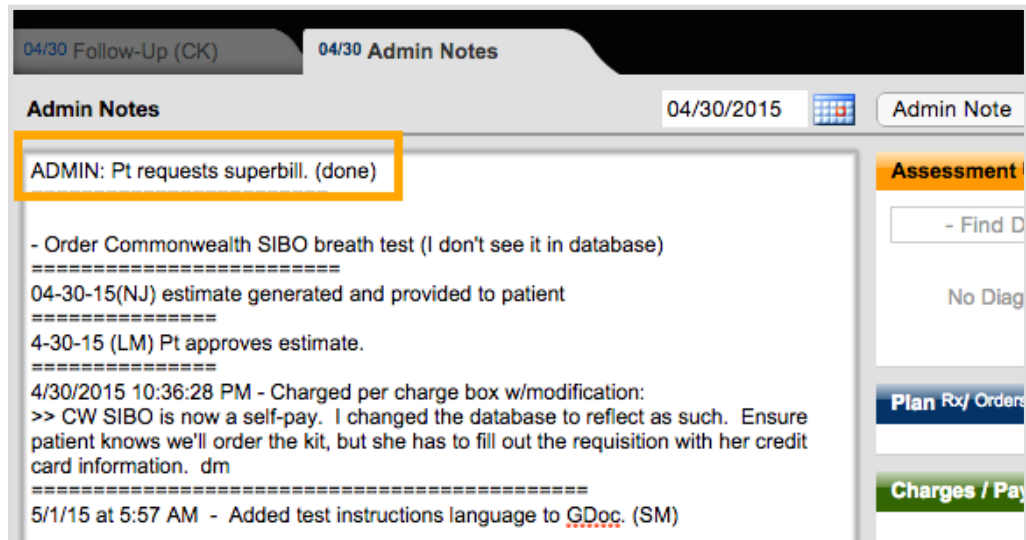
Hi [*patient name*],

Please go to the Labs and Documents section of your Patient Portal, then select the Invoices tab in the blue box on the bottom left to see the requested insurance invoice for date of service [XXXX].

[*your signature*]

2. Save changes.

- Go to the Admin Note of the encounter. Next to the note where it states a superbill is requested, add: (done). Example below outlined in orange:



04/30 Follow-Up (CK) 04/30 Admin Notes

Admin Notes 04/30/2015 Admin Note

ADMIN: Pt requests superbill. (done)

- Order Commonwealth SIBO breath test (I don't see it in database)
=====

04-30-15(NJ) estimate generated and provided to patient
=====

4-30-15 (LM) Pt approves estimate.
=====

4/30/2015 10:36:28 PM - Charged per charge box w/modification:
>> CW SIBO is now a self-pay. I changed the database to reflect as such. Ensure patient knows we'll order the kit, but she has to fill out the requisition with her credit card information. dm
=====

5/1/15 at 5:57 AM - Added test instructions language to GDoc. (SM)

Assessment
- Find D
No Diag

Plan Rx/ Orders

Charges / Pay