

Add Charges to the Database

PURPOSE:


1. Move encounters quickly and efficiently through the flow of the practice.
2. Create continuity with labeling and processing.
3. Improve the quality of work within the practice.
4. Provide accurate information to patients to improve the flow of encounters.
5. Reduce number of errors and omissions.

PROCEDURE:

Expected Time Frame: as needed.

1. In MD HQ, it is helpful to have the information from the plan box database available while adding the charge.
 - a. For supplements: click on Admin, then Manage, then Alternate Plan Options.
 - b. For tests: click on Admin, then Manage, then CPT Database.
2. Open MD HQ in another browser tab, then click on Admin, then Manage, then Charge List.
3. Search several different ways for the charge you are going to add to make sure it is not already in the database.

Reminder: Quest markers are never entered into the charge database because we do not charge patients for these tests. Never add a new charge for a Quest test.

4. Click 
5. **Charge Name:** copy and paste the name of the supplement or test from the CPT or Alternate Plan database. The charge name must match the CPT/Alternate Plan name exactly.
6. **CPT Codes:**
 - a. If adding a test/lab/marker: copy and paste the CPT code(s) from the CPT database, as provided by the lab.
 - b. If adding a supplement: leave blank.
7. **Nickname (1):**
 - a. If adding a test/lab/marker: leave blank.
 - b. If adding a supplement: use the Code/ID# from the Alternate Plan database.
8. **Nickname (2):** leave blank.
9. **Nickname (3):** leave blank.
10. **Charge is submittable for insurance:** check-mark if adding a test/lab/marker.
11. **Staff time:** leave at 0.

12. **Incurred Costs:** leave at 0.00.
13. **Is this a supply/product:** check-mark if adding a supplement.
14. **Charge type:**
 - a. Appointments: use for appointment fees.
 - b. Consultations: use for consultations (ex: e-consult fees, or consults prior to pt onboarding).
 - c. Financial Admin: use for charges that are to make account adjustments (ex: refunds, credits, bad debt w/o, adjustment).
 - d. Health Coaching: use for health coaching fees.
 - e. Lab Fees: use for all lab markers and interpretation fees.
 - f. Lab Kits: use for all test kits.
 - g. Misc Income: use for income not otherwise categorized (ex: records reviews, prescription fees, research).
 - h. Procedures: use for procedures performed in-office.
 - i. Sales Tax: use for sales tax.
 - j. Supplements: use for all supplements.
15. **Color:**
 - a. Appointments: rose
 - b. Consultations: black
 - c. Financial Admin: light green
 - d. Health Coaching: grey
 - e. Lab Fees: blue
 - f. Lab Kits: fuschia
 - g. Misc Income: green
 - h. Procedures: orange
 - i. Sales Tax: dark blue
 - j. Supplements: purple
16. **Is taxable?:** do not mark
17. **Price:** fill in the price.
 - a. LabCorp markers: http://www.professionalco-op.com/index.php?option=com_virtuemart&Itemid=189
 - b. Quest markers: are never entered into the charge database.
 - c. Lab kits: use the fee guides in the DropBox>Patient Coordination>Fee Guides folder.
 - d. Supplements: use the Vendor Lists & Credentials spreadsheet for pricing guidelines from each website.

18. Description:

- a. Appointments: *[length and type of appointment]* with *[clinician name and credentials]*

Examples:

45-minute established patient office visit with Dr. Sunjya Schweig, MD

Case Review Study with Chris Kresser, L.Ac.

45-minute established patient video appointment with Dr. Amy Nett, MD

- b. Consultations: *[length and brief description]* with *[clinician name and credentials]*

- c. Financial Admin: *[brief description]*

Examples:

Clinician lab results interpretation fee

Credit card declination fee

- d. Health Coaching: *[length and brief description]* with *[clinician name and credentials]*

- e. Lab Fees: *[full lab name]* *[test number or description of fee]*

Examples:

LabCorp test number 247800

LabCorp's fee for obtaining intravenous access to draw the blood for your blood tests.

- f. Lab Kits: *[full lab name]* *[full test name and/or number]*

Examples:

IGeneX Labs #995 Complete Rickettsia Panel

Doctor's Data Comprehensive Stool Analysis with Parasitology x3

- g. Misc Income: *[brief description of fee]*

Example:

Admin fee for processing prescription requests via electronic means outside of a normal appointment.

- h. Procedures: *[brief description of procedure]*

- i. Supplements: *[brand name]* *(total doses info from Alternate Plan database)*

Examples:

Natura Health Products (90 capsules)

Xymogen (60 vegcaps)

Byron White Formulas (1 oz)

Note: whatever is in this box is printed on estimates that are created.

19. **Charge is active:** Leave marked to active.

- a. Note: if products are no longer available, duplicate entries were created by mistake, etc., mark “charge is inactive” to hide this entry from being searchable and applied to encounters.
- b. If taking this step, in the very first line of the description, put a reason for inactivation in parentheses.

Examples:

(discontinued)

(duplicate)

20. **Click here to manage how this charge displays on an invoice:** click this if you are adding a test kit or a lab fee that has multiple CPT codes, so that insurance invoices generate with a line-by-line breakdown of charge per CPT code.

- a. If taking this step, click “add line-item.”
- b. On the first line, copy the charge name and paste it into the “subitem name” box.
- c. Click “add line-item” and put the first CPT code in the “CPT code” box, then add the price for this CPT code in the last box that shows the dollar sign.
- d. Continue to click “add line-item” to add additional lines until you have added all CPT codes.
- e. Add one final line and put “Clinician Interpretation Fee (no applicable CPT code)” in the “CPT code” box, then add the \$50 interpretation fee in the last box that shows the dollar sign. Example below:

Click here to manage how this charge displays on an invoice.

When creating invoices submission to insurance (by the practice or the patient), many insurers will reject claims where more than one CPT code is listed on a single line. The section below allows you to change the way that this charge is presented on an insurance invoice.

CPT Code	BioHealth #201	\$ 0.00	[- Remove]
82530 x2	Subitem Name	\$ 76.00	[- Remove]
82627 x2	Subitem Name	\$ 40.00	[- Remove]
Clinician Interpretation Fee	Subitem Name	\$ 50.00	[- Remove]

[Add Line-Item](#)

[+ Edit Charge](#)

[VIEW USAGE REPORT ON "BIOHEALTH #201" CHARGE](#)

21. Click [+ Add This Charge](#)