Adding and Editing Charges

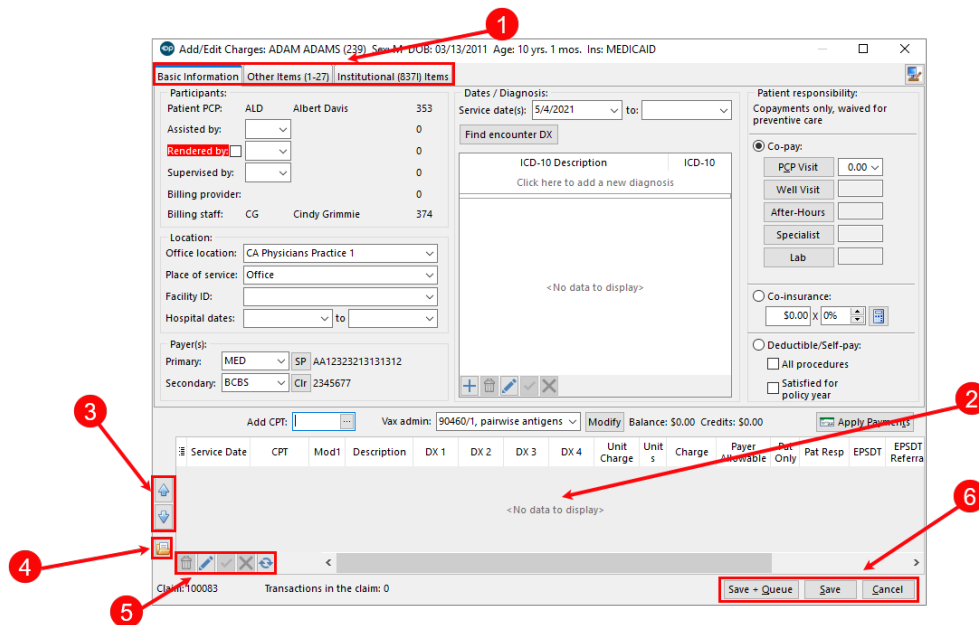Last Modified on 07/30/2021 1:29 pm EDT

Version 20.3

> This window map article points out some of the important aspects of the window you're working with in OP but is not intended to be instructional. To learn about topics related to using this window, see the **Related Articles** section at the bottom of this page.

About Add/Edit Charges

> **Path: Billing, Practice Management, or Clinical tab > Patient Chart button > Charges > New Claim button**
>
> **Path: Billing, Practice Management, or Clinical tab > Patient Chart button > Charges > Select Claim > Edit button**

The Add / Edit Charges window adds or edits charges to a Claim. The window is split between three tabs (Basic Information, Other Items, and Institutional items). Enter data into the claim fields to complete the CMS-1500 form.

Add/Edit Charges Map

Number	Section	Description
1	Charge Window tabs	• **Basic Information tab**: contains the provider information, location information, insurance payer, date(s) of service, ICD-10 diagnoses, CPT codes, and patient responsibility. • **Other Items tab**: additional information that may be required upon claim submissions such as injury or referral details. • **Institutional (837I) Items tab**: incident to billing facility Claims.
		This section is the main body of the Claim and shows the claim lines. For each claim line, it includes the date of service, CPT code, modifiers 1-4, diagnosis pointers 1-4, charge amounts,

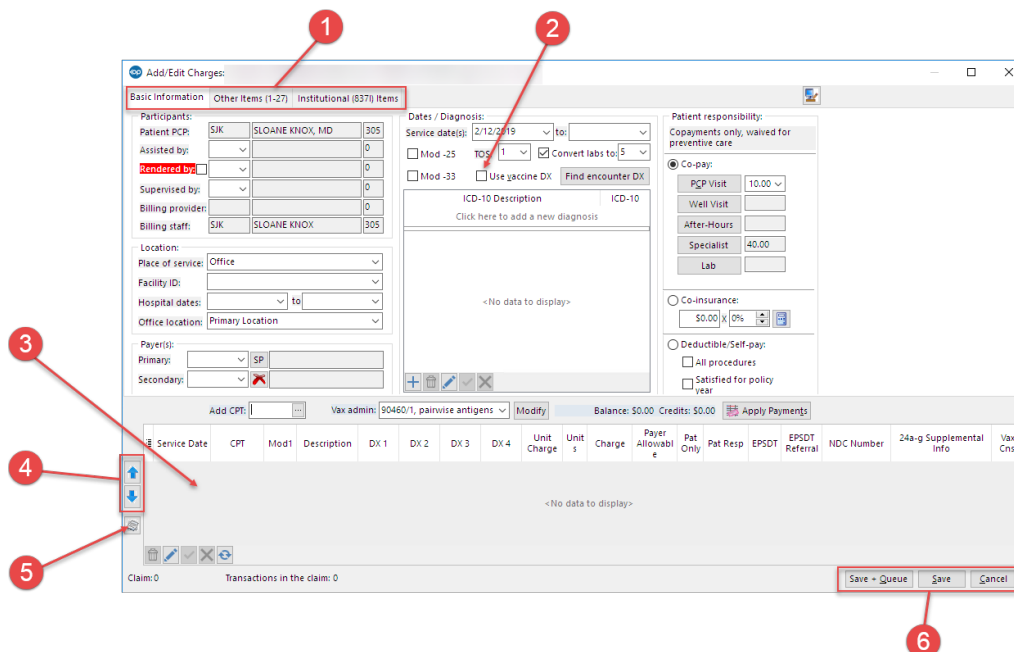| 2	Claim Lines	charge units, patient responsibility amount, EPSDT reportables, and NDC numbers when required. **Columns** may be added or removed from this grid.
3	Move Arrows	Move a selected claim line up or down to determine the order in which the claim lines are displayed on the Claim.
4	Event Chronology	Access to the Event Chronology for the focused patient directly from the Add/Edit Charges window. It will force the user to leave the Add / Edit Charges window, so any changes necessary must be done by editing the claim.
5	Function buttons	The function buttons are used to remove a claim line, edit a claim line, save a change, cancel a change, and refresh the data.
6	Save options and Cancel buttons	**Save + Queue**: saves the Claim and moves it to the Transmit Queue. **Save**: saves the Claim but does *not* move it into the Transmit Queue. **Cancel**: saves the Claim but does *not* move it into the Transmit Queue.

Version 20.2

About Adding and Editing Charges

> **Path: Billing, Practice Management, or Clinical tab > Patient Chart button > Charges > New Claim button**
>
> **Path: Billing, Practice Management, or Clinical tab > Patient Chart button > Charges > select Claim > Edit button**

The Add / Edit Charges window adds or edits charges to a Claim. The window is split between three tabs (Basic Information, Other Items, and Institutional items). Enter data into the claim fields to complete the CMS-1500 form.

Adding and Editing Charges Map

Number	Section	Description
		Basic Information tab: contains the provider information, location information,

1	Charge Window tabs	insurance payer, date(s) of service, ICD-10 diagnoses, CPT codes, and patient responsibility. • **Other Items tab**: additional information that may be required upon claim submission such as injury or referral details. • **Institutional (837I) Items tab**: incident to billing facility Claims.
2	Use Vaccine DX	Select this checkbox to apply Z23 as the diagnosis code to all Vaccines on a Claim. After selecting the checkbox, click the **Modify button** and the Diagnosis Code assigned to each Vaccine on the claim changes to reflect Z23. Click the **Pref** button [icon] at the top of the Add / Edit Charges window to make selecting this checkbox preferred.
3	Claim Lines	This section is the main body of the Claim and shows the claim lines. For each claim line, it includes: the date of service, CPT code, modifiers 1-4, diagnosis pointers 1-4, charge amounts, charge units, patient responsibility amount, EPSDT reportables, and NDC numbers when required. **Columns** may be added or removed from this grid.
4	Move Arrows	Move a selected claim line up or down to determine the order in which the claim lines are displayed on the Claim.
5	Event Chronology	Provides access to the Event Chronology for the focused patient directly from the Add/Edit Charges window. It will force the user to leave the Add / Edit Charges window, so any changes necessary must be done by editing the claim.
6	Save+ Queue, Save, and Cancel	• **Save + Queue**: saves the Claim and moves it to the Transmit Queue. • **Save**: saves the Claim but does *not* move it into the Transmit Queue. • **Cancel:** saves the Claim but does *not* move it into the Transmit Queue.