



Important Content Update Message

We are currently updating the OP Help Center content for OP 20. We appreciate your patience as we continue to make these updates. To locate the version of your software, navigate to: **Help tab > About**

Posting Electronic Superbill Charges

Last Modified on 01/07/2021 2:27 pm EST

Version 20.3

Overview

Once your office is fully live and utilizing the EHR side of the OP software, the clinical side of the system begins to generate superbill charges for the patient. Those charges make up the electronic superbill. The electronic superbill may be posted from within the Tracking screen (most common), the Superbill tab in the Billing Center, or the Patient Chart.

Posting Charges

1. Navigate to where you will post the charges and follow the initial Steps to Post Charges directives before proceeding to Step 2:

Location of Charge Posting	Navigation	Steps to Post Charges
Tracking	Billing, Clinical, or Practice Management tab > Schedule button > Tracking radio button	<ol style="list-style-type: none"> 1. Select the Show Billing Panel checkbox. 2. Review the Billing Status and/or Superbill Stage column to determine what charges can be posted. 3. Select the Patient whose charges you would like to post. 4. Review the Insurance(s) listed for the patient. Click the Upd Ins button if necessary to be taken to the Insurance record for the patient. Review the Billing Notes for the patient.
Superbills Tab	Billing tab > Billing Center button > Superbills tab	Locate the patient and date of service for which you would like to post. The + can be used to expand the charges. The stage of the superbill will indicate if the superbill is ready to be converted.
Patient Chart	Billing, Clinical, or Practice Management tab > Patient Chart button > Select Patient > Charges	Locate the Superbill (Unposted) Charges at the top of the window.

2. In the **UNPOSTED CHARGES** section, click one of the following buttons:

- **Auto-Post** (available in Tracking only)
- **Post All**
- **Post Selected**

If you select **Post All** or **Post Selected**, the **Add/Edit Charges** window is displayed.

Note: If a Warning box is displayed that states that there is missing information (such as a missing Rendering Provider, missing DX Code, or a Supervising Provider is needed on the claim), click the **OK** button. After clicking OK, the Charges



are not displayed in the **Add/Edit Charges** window. First, add the missing or required information and then click the **Import Superbill** button to import the charges and continue with posting.

3. Review the following charge information in the **Add/Edit Charges** window. This information has been passed on from the clinical team.

- Rendered by
- Billing Provider
- Location
- Office Location
- Service Dates
- ICD-10 Code(s)
- CPT Codes



Note: If the same CPT code needs to be billed twice for a medication, but the NDC ID differs for the two instances of the code, enter the NDC ID that is not housed in the CPT code table for that CPT.

- NDC ID(s), if applicable



Note: To review the patient's visit note to ensure that all services rendered are displayed on the Superbill, click the **View Event Chronology** button (located below the blue up and down arrows) to navigate to the Event Chronology for the patient's visit. If edits are necessary after reviewing the Chron, navigate back to the patient and click the **Edit** button.

4. *(Optional)* Aside from correcting information on the charges that came from the clinical team, there are some additional options to consider when reviewing the **Add/Edit Charges** window:

- **Move Charge Lines:** The up and down arrows may be used to reorganize the lines of a claim so that they are displayed in a particular order.
- **Patient Responsibility:** Select this checkbox for any charge lines in a claim that are the patient's responsibility. The charge line is submitted to insurance on the claim, but the balance will remain with the patient.
- **Vax Cnsl:** This checkbox is displayed on the charge as it was charted by the Provider or person administering the Vaccine. If you need to edit this checkbox, click the **Modify** button to apply the change.



Note:

5. *(Optional)* If a payment was collected and needs to be applied to the charges, visit [Applying Copayments While Posting Charges](#).
6. Select the **Option** you would like to use for saving the charges: **Save**, **Save + Queue**, or **Cancel**. Continue with the next charge to post. The posted charges are displayed under the Current / Posted Charges section of the window.

Version 20.2

Overview

Once your office is fully live and utilizing the EHR side of the OP software, the clinical side of the system begins to generate superbill charges for the patient. Those charges make up the electronic superbill. The electronic superbill may be posted from within the Tracking screen (most common), the Superbill tab in the Billing Center, or the Patient Chart.

Posting Charges

1. Navigate to where you will post the charges and follow the initial Steps to Post Charges directives before proceeding to Step 2:

Location of Charge Posting	Navigation	Steps to Post Charges
Tracking	Schedule button (in Billing, Clinical, or Practice Management tab) > Tracking radio button	<ol style="list-style-type: none"> 1. Select the Show Billing Panel checkbox. 2. Review the Billing Status and/or Superbill Stage column to determine what charges can be posted. 3. Select the Patient whose charges you would like to post. 4. Review the Insurance(s) listed for the patient. Click the Upd Ins button if necessary to be taken to the Insurance record for the patient. Review the Billing Notes for the patient.
Superbills Tab	Billing tab > Billing Center button > Superbills tab	Locate the patient and date of service for which you would like to post. The + can be used to expand the charges. The stage of the superbill will indicate if the superbill is ready to be converted.
Patient Chart	Patient Chart button (in Billing, Clinical, or Practice Management tab) > Select Patient > Charges	Locate the Superbill (Unposted) Charges at the top of the window.

2. In the UNPOSTED CHARGES section, click one of the following buttons:

- **Auto-Post ***
- **Post All**
- **Post Selected**

**only available in Tracking*

If you select Post All or Post Selected, the Add/Edit Charges window is displayed.



Note: If a Warning box is displayed that states that there is missing information (such as a missing Rendering Provider, missing DX Code, or a Supervising Provider is needed on the claim), click the **OK** button. After clicking the OK button, the Charges are not displayed in the Add/Edit Charges window. First, add the missing or required information and then click the **Import Superbill** button to import the charges and continue with posting.

3. Review the following charge information in the Add/Edit Charges window. This information has been passed on from the clinical team.

- Rendered by
- Billing Provider
- Place of Service (and other Location information)
- Service Dates
- ICD-10 Code(s)
- CPT Codes




Note: If the same CPT code needs to be billed twice for a medication, but the NDC ID differs for the two instances of the code, enter the NDC ID that is not housed in the CPT code table for that CPT.

- NDC ID(s), if applicable

Note: To review the patient's visit note to ensure that all services rendered are displayed on the Superbill, click the **View**



Event Chronology button (located below the blue up and down arrows) to navigate to the Event Chronology for the patient's visit. If edits are necessary after reviewing the Chron, navigate back to the patient and click the **Edit** button.

4. (Optional) Aside from correcting information on the charges that came from the clinical team, there are some additional options to consider when reviewing the Add/Edit Charges window:
- **Use Vaccine DX:** Select this checkbox to apply the diagnosis code, Z23, to vaccine and vaccine administration charges. After selecting the **Checkbox**, click the **Modify** button to apply the change. The selection of this checkbox may be saved as a preference by clicking the **Pref** button .
 - **Move Charge Lines:** The up and down arrows may be used to reorganize the lines of a Claim so that they are displayed in a particular order.
 - **Patient Responsibility:** Select this checkbox for any charge lines in a Claim that are the patient's responsibility. The charge line is submitted to insurance on the Claim, but the balance will remain with the patient.
 - **Vax Cnsl:** This checkbox is displayed on the charge as it was charted by the Provider or person administering the Vaccine. If your Chron review results in you needing to edit this checkbox, click the **Modify** button to apply the change.



If a Payment has been collected needs applied to the charges, visit [Applying Copayments While Posting Charges](#)

Select the **Option** you would like to use for saving the charges: **Save, Save + Queue, or Cancel**. Continue with the next charge to post. The posted charges are displayed under the Current / Posted Charges section of the window.