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# Manually Entering Charges from a Paper Superbill

Last Modified on 02/04/2021 12:13 pm EST

Version 14.19

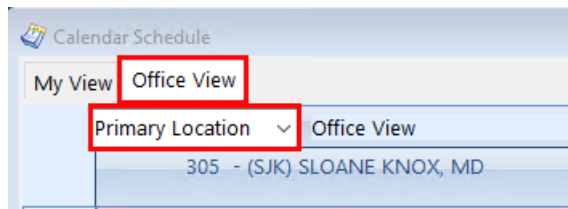
**Path: Clinical, Billing, or Practice Management tab > Schedule button**

## Overview

Follow the steps below to manually enter superbill charges.

## Entering Superbill Charges from Tracking

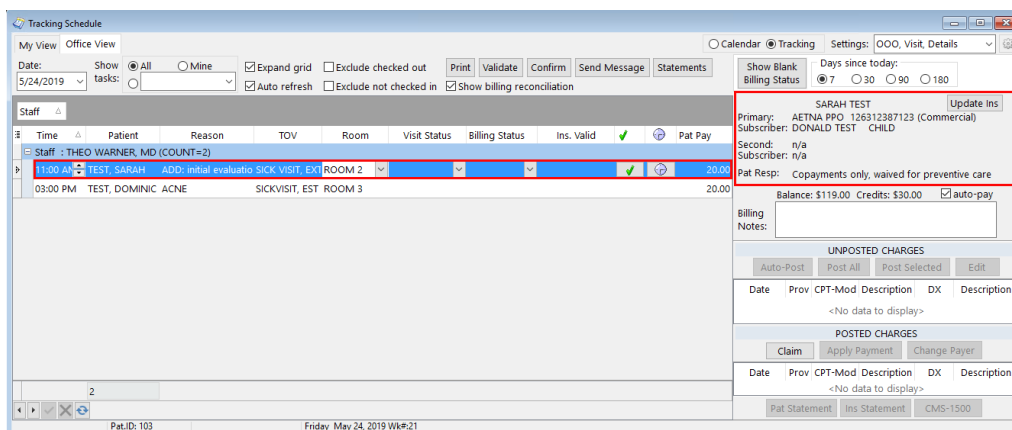
When the Schedule opens ensure that you have selected the location and Calendar View that you are ready to work o




1. Select the **Tracking** radio button.



2. Select the **Show billing reconciliation** checkbox. The Billing Reconciliation panel in the Tracking window is displayed.
3. Click to highlight the Patient appointment for the Patient that you want to post charges for.



4. At the bottom of the Billing Reconciliation, click the **Claim** button. The Add/Edit Charges window is displayed.
5. Enter the following from the paper Superbill:
  - a. The **Rendering Provider**
  - b. The **Billing Provider** (if applicable)
  - c. The **Place of Service** (if other than POS=11)

- d. The **Facility** of where services were rendered (*if applicable*)
- e. **Service dates** (*if other than the current day you are entering in the charge*)
- f. Enter in the **Diagnosis Codes** selected by your Rendering Physician
- g. (*Optional*) Click the other **Tags** at the top of this window if other pertinent information is needed to be sent on the claim (i.e. Injury dates, Referring Physician, etc.)
- h. Enter your **CPT codes** on the lower half of the screen.
  - i. Enter the desired **CPT code** and press the **Enter** key on your keyboard.
  - j. (*Optional*) If the CPT code is unknown, click the **3-dotted ellipsis**  to search the CPT/Procedure code table.
- k. Once the CPT codes are entered on the lower half of the screen, enter in any further **pertinent information** needed for the codes (i.e. attached Diagnosis codes, Modifiers, NDC#, etc.).
  - l. Once the charge is entered, apply any patient responsibilities to the claim by using the **Patient responsibility** fields.
- m. If there are available credits to use or you have a payment in hand to post against this patient responsibility click the **Apply Payment** button. A new **Add/Edit Payment** window is displayed.
- n. Select the appropriate **Payment Method** from the drop-down menu.
- o. Enter the **Payment** amount - the amount you wish to apply to this Patient Balance due.
- p. Click the **Save and Close** button. This takes you back to the Add/edit Charges window.
- q. Once entering the charges details is complete, click the **Save** button.

The Billing Status of the patient's appointment now says, **Complete**.

## From the Patient Account

1. Click the **Patient Chart** button on the Clinical, Billing or Practice Management tab.
2. Search for and select the **Patient**.
3. Click **Charges** in the Account section of the Window Navigation Panel.
4. Click the **New Claim** button. The **Add/Edit Charges** window is displayed.
5. Enter the following from the paper Superbill:
  - a. The **Rendering Provider**
  - b. The **Billing Provider** (*if applicable*)
  - c. The **Place of Service** (*if other than POS=11*)
  - d. The **Facility** of where services were rendered (*if applicable*)
  - e. **Service dates** (*if other than the current day you are entering in the charge*)
  - f. Enter the **Diagnosis Codes** selected by your Rendering Physician.
  - g. (*Optional*) Click the other **Tags** at the top of this window if other pertinent information is needed to be sent on this claim (i.e. Injury dates, Referring Physician, etc.).
  - h. Enter your **CPT codes** on the lower half of the screen.
    - i. Enter the desired **CPT code** and press the **Enter** button on your keyboard.
    - j. (*Optional*) If the CPT code is unknown, click the **3-dotted ellipsis** to search the CPT/Procedure code table.
  - k. Once the CPT codes are entered on the lower half of the screen, enter in any further **pertinent information** needed for the codes (i.e. Modifiers, NDC#, etc.).
    - l. Once the charge is entered, apply any patient responsibilities to the claim by using the **Patient responsibility** fields.
  - m. If there are available credits to use or you have a payment in hand to post against this patient responsibility click the **Apply Payment** button. A new Add/Edit Payment window is displayed.
  - n. Select the appropriate **Payment Method** from the drop-down menu.
  - o. Enter the **Payment** in the field - the amount you wish to apply to this Patient Balance due.
  - p. Click the **Save and Close** button.

Version 14.10

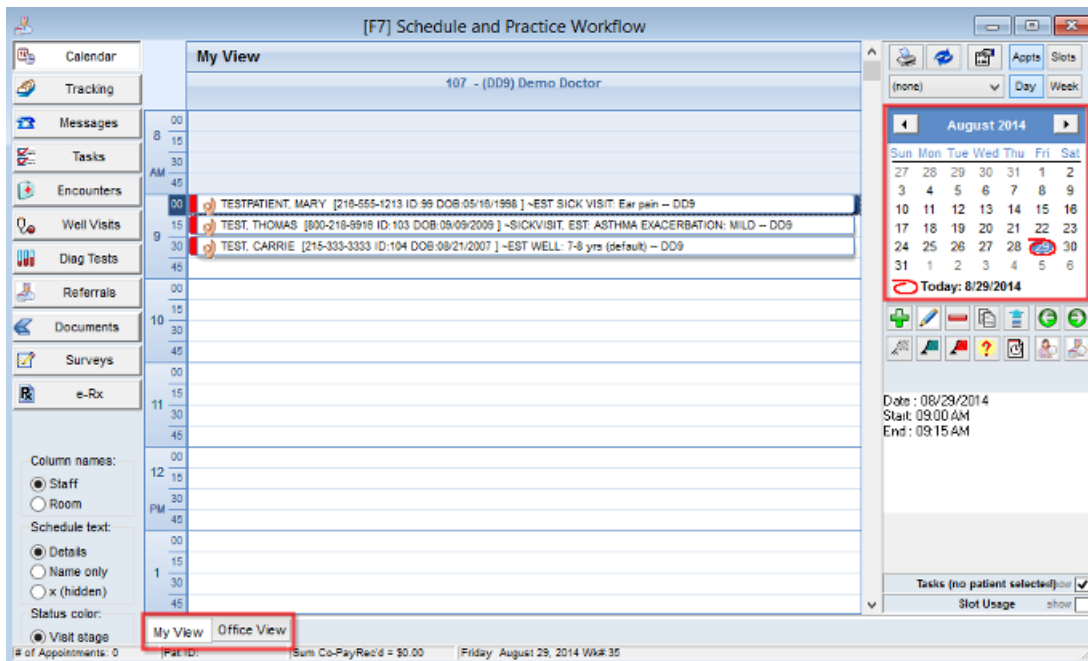
## Smart Tool Bar > Schedule button


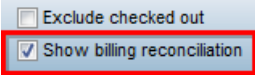
## Overview

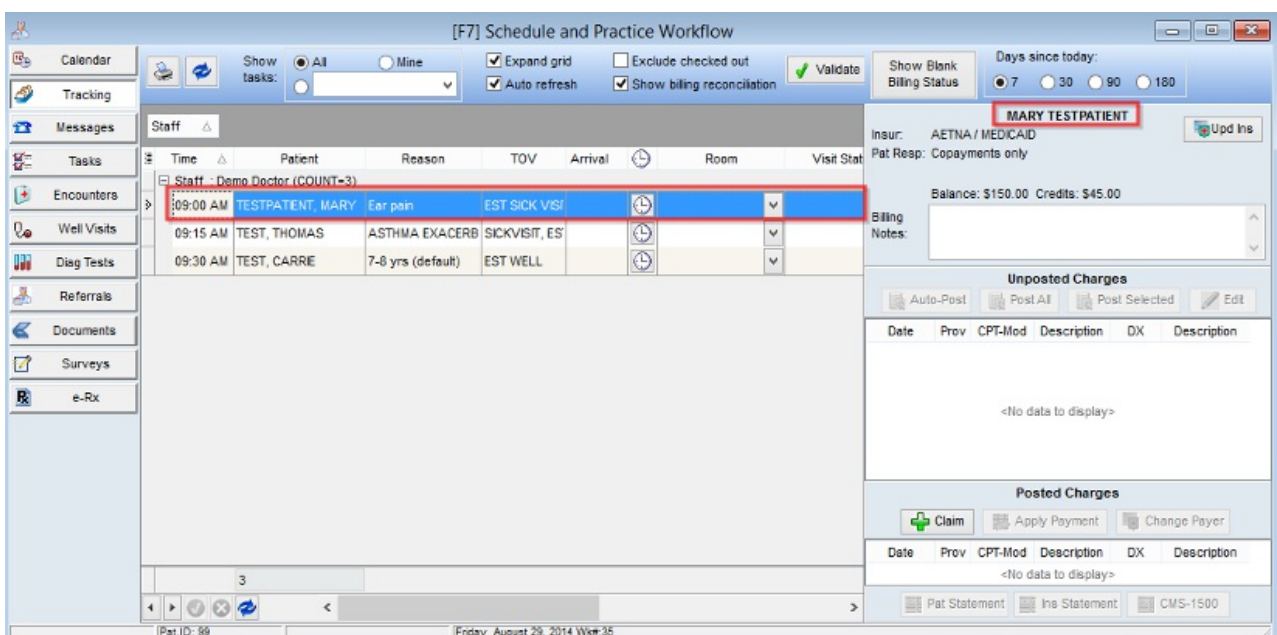
Follow the steps below to manually enter superbill charges.

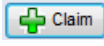
## Entering Superbill Charges

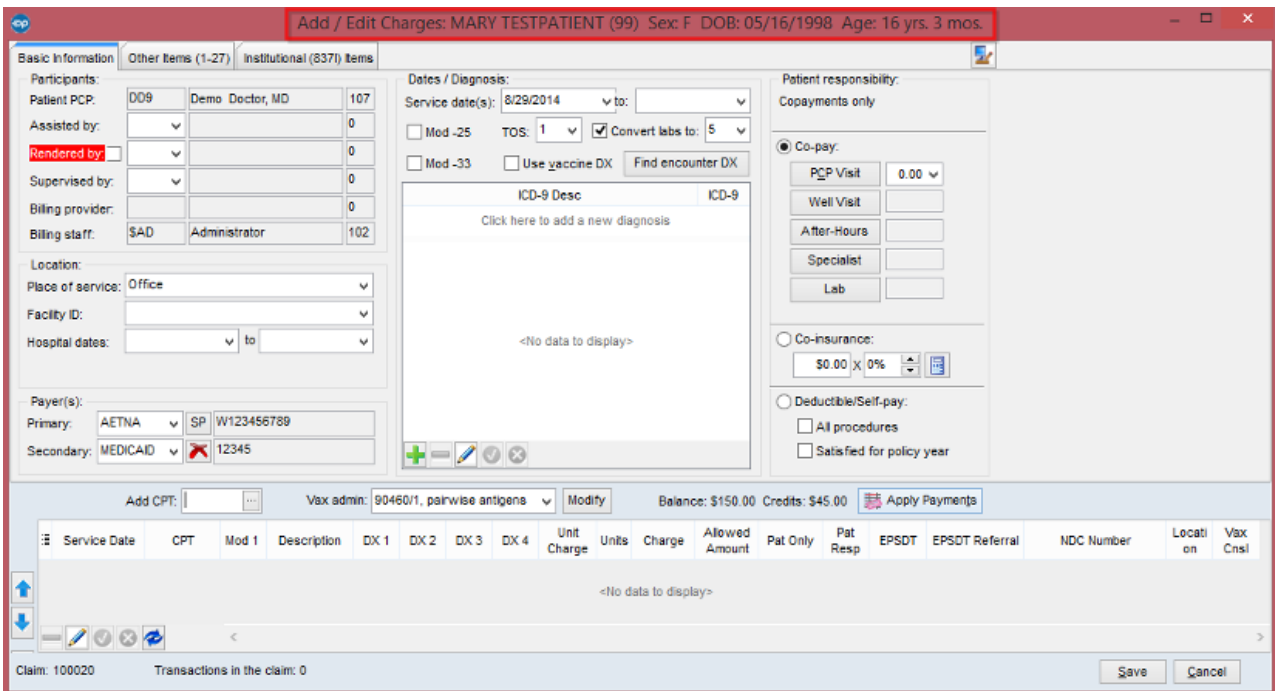
When the Schedule opens, ensure that you have selected on your calendar the **date of service & calendar view** that you are ready to work on.



1. Click the **Tracking** tab  **Tracking**.
2. Select the **Show billing reconciliation** checkbox . The Billing Reconciliation window is displayed.
3. On the Tracking screen, select the Patient to post charges for by clicking to highlight their **Appointment**.



4. At the bottom of the Billing Reconciliation, click the **Plus Claim** button . The Add/Edit Charges screen is displayed. From here proceed with posting charges.


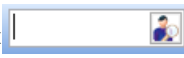
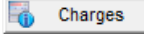
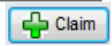


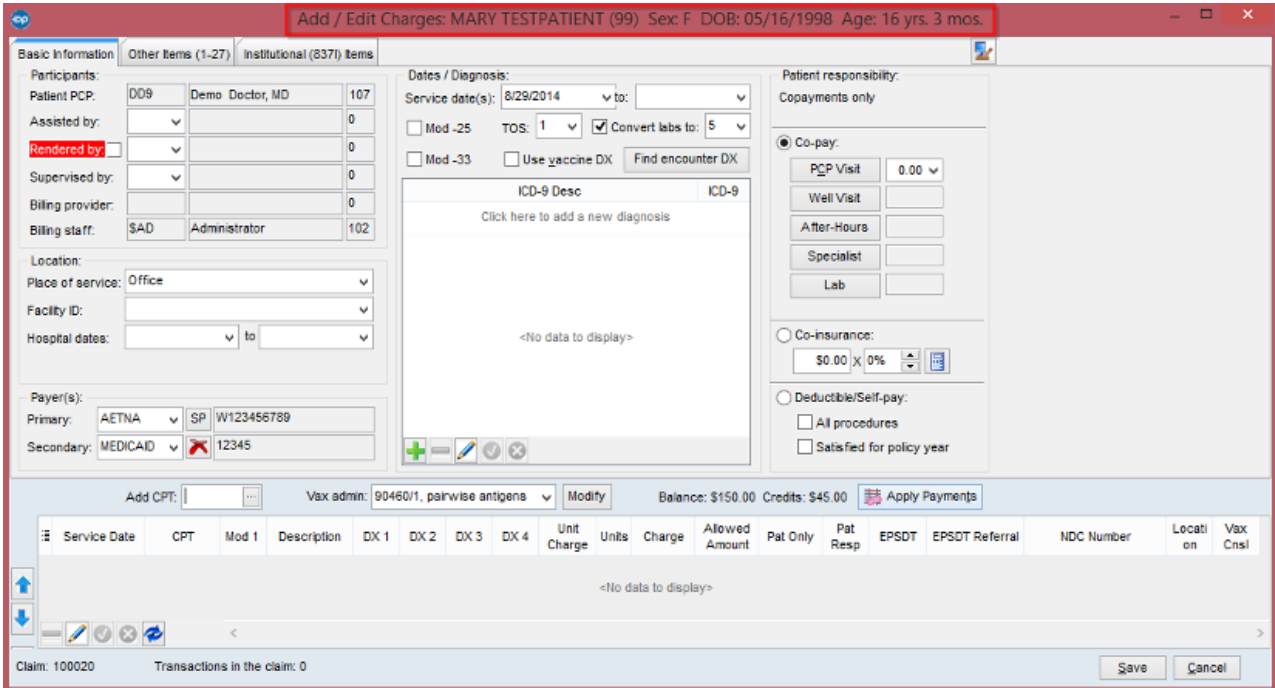
When the **Add/Edit Charges** window is displayed, the **Basic Information** tab is displayed.

5. Enter from the paper Superbill:
- The **Rendering Provider**
  - The **Billing Provider** (if applicable)
  - The **Place of Service** (if other than POS=11)
  - The **Facility** of where services were rendered (if applicable)
  - Service dates** (if other than the current day you are entering in the charge)
  - Enter the **Diagnosis Codes** selected by your Rendering Physician.
  - (Optional) Click the other **Tags** at the top of this window if other pertinent information is needed to be sent on this claim (i.e. Injury dates, Referring Physician, etc.).
  - Enter your **CPT codes** on the lower half of the screen.
    - Enter the desired **CPT code** and press the **Enter** button on your keyboard.
    - (Optional) If the CPT code is unknown, click the **3-dotted ellipsis** to search the CPT/Procedure code table.
    - Once the CPT codes are entered on the lower half of the screen, enter in any further **pertinent information** needed for the codes (i.e. Modifiers, NDC#, etc.).
    - (Optional) If there are columns needed (or un-needed), click the **3-dotted ellipsis** to the left of the columns and check (or uncheck) necessary columns to be viewed while entering in charges.
  - Once the charge is entered, apply any patient responsibilities to the claim by using the **Patient responsibility** fields.
  - If there are available credits to use or you have a payment in hand to post against this patient responsibility click the **Apply Payment** button. A new Add/Edit Payment window is displayed.
  - Select the appropriate **Payment Method** from the drop-down menu.
  - Enter the **Payment** in the field - the amount you wish to apply to this Patient Balance due.
  - Click the **Save and Close** button.
  - Once entering the charges details is complete, click the **Save** button.

The Billing Status of the patient's appointment now says **Complete**.

## From the Patient Account

1. Click the **Acct** button  to open the **Patient Account**.
2. If you do not have the patient already selected in the Choose box  search for the patient.
3. Click the **Charges** tab .
4. Click the **Plus Claim** button . The Add/Edit Charges screen is displayed. From here proceed with posting charges.



When the **Add/Edit Charges** window is displayed, the user will default to the first tab (**Basic Information**).

5. Enter in from the paper Superbill.
  - a. The **Rendering Provider**
  - b. The **Billing Provider** (if applicable)
  - c. The **Place of Service** (if other than POS=11)
  - d. The **Facility** of where services were rendered (if applicable)
  - e. **Service dates** (if other than the current day you are entering in the charge)
  - f. Enter the **Diagnosis Codes** selected by your Rendering Physician.
  - g. (Optional) Click the other **Tabs** at the top of this window if other pertinent information is needed to be sent on this claim (i.e. Injury dates, Referring Physician, etc.).
  - h. Enter your **CPT codes** on the lower half of the screen.
    - i. Enter the desired **CPT code** and press the **Enter** button on your keyboard.
    - j. (Optional) If the CPT code is unknown, click the **3-dotted ellipsis** to search the CPT/Procedure code table.
  - k. Once the CPT codes are entered on the lower half of the screen, enter in any further **pertinent information** needed for the codes (i.e. Modifiers, NDC#, etc.).
  - l. (Optional) If there are columns needed (or un-needed), click the **3-dotted ellipsis** to the left of the columns and check (or uncheck) necessary columns to be viewed while entering in charges.
  - m. Once the charge is entered, apply any patient responsibilities to the claim by using the **Patient responsibility** fields.
  - n. If there are available credits to use or you have a payment in hand to post against this patient responsibility click the **Apply Payment** button. A new Add/Edit Payment window is displayed.
  - o. Select the appropriate **Payment Method** from the drop-down menu.
  - p. Enter the **Payment** in the field - the amount you wish to apply to this Patient Balance due.

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q. Click the **Save and Close** button.

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