



**Important Content Update Message**

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


# Manually Entering a Claim

Last Modified on 05/28/2020 1:28 pm EDT

Version 20.3

## Overview

Follow the steps below to create a claim in the Patient Chart. This workflow is different from entering superbill charges, which then have to be converted to a claim.

1. Click the **Patient Chart** button on the Clinical, Billing, or Practice Management tab.
2. If needed, use the **Search box**  to 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 information (items in red are required fields):

- **Rendering Provider:** Select the **Provider** that saw the patient. If the Rendering Provider does not have billing credentials, a name must be selected from the **Supervised by** drop-down menu.



Participants:			
Patient PCP:	DD	Doctor Dostittie, MD	353
Assisted by:			0
Rendered by:	<input type="checkbox"/>	DD	Doctor Dostittie, M.D. 353
Supervised by:			0
Billing provider:	DD	Doctor Dostittie, M.D.	353
Billing staff:	\$AD	Administrator	102

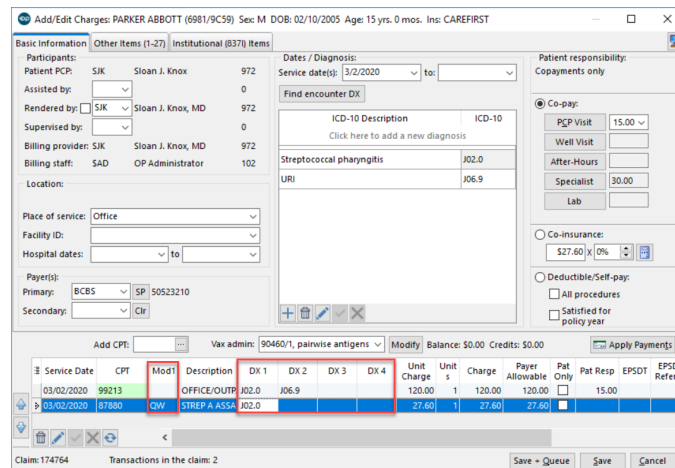
- **Insurance or Self-pay:** The patient's primary insurance is displayed here. There is the option to select an alternate payer or self-pay for this claim.

Payer(s):	
Primary:	ELD OF PA SP 12121212
Secondary:	<input type="button" value="X"/>

- **Date:** The system default is the current date. To backdate the claim, click the drop-down menu to change to the desired date.

Dates / Diagnosis:	
Service date(s):	3/2/2020 to:

- **ICD-10:** Click the **Add** button  and enter the numeric code or description to search under the ICD-10 Desc field. Then, click the **Save** button  to add the diagnosis code to the claim. Up to twelve diagnosis codes can be placed on a claim.
- **CPT:** Enter the numeric **CPT code** or click the **Ellipsis** button to search for the code.
- Diagnosis codes must be assigned to each CPT code line. Use the drop-down menu to select the diagnosis code or add modifiers.



Service Date	CPT	Mod1	Description	DX 1	DX 2	DX 3	DX 4	Unit Charge	Unit 5	Charge	Payer Allowable	Pat Only	Pat Resp	EPSTD	EPSTD Referra
03/02/2020	99213		OFFICE/OUTP	J02.0	J06.9			120.00	1	120.00	120.00		15.00		
03/02/2020	87800	QW	STREP A ASSA	J02.0				27.60	1	27.60	27.60				


**Note:**

- Once all charges have been entered click the **Save** or **Save + Queue** button in the bottom right hand corner of the Add/Edit Charges window.

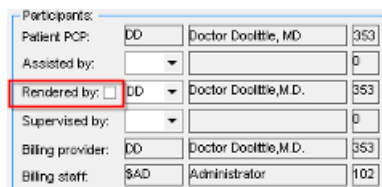
Version 20.2

## Overview

Follow the steps below to create a claim in the Patient Chart. This workflow is different from entering superbill charges, which then have to be converted to a claim.

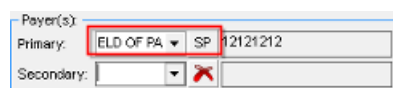
- Click the **Patient Chart** button on the Clinical, Billing, or Practice Management tab.
- If needed, use the **Search box**  to search for and select the patient.
- Click **Charges** in the Account section of the Window Navigation Panel.
- Click the **New Claim** button. The Add/ Edit Charges window is displayed.
- Enter the following information (items in red are required fields):

- Rendering Provider:** Select the **Provider** that saw the patient. If the Rendering Provider does not have billing credentials, a name must be selected from the **Supervised by** drop-down menu.



Participants:			
Patient PCP:	DD	Doctor Doclttle, MD	353
Assisted by:			0
Rendered by:	DD	Doctor Doclttle, M.D.	353
Supervised by:			0
Billing provider:	DD	Doctor Doclttle, M.D.	353
Billing staff:	SAD	Administrator	102

- Insurance or Self-pay:** The patient's primary insurance is displayed here. There is the option to select an alternate payer or self-pay for this claim.



Payer(s):	
Primary:	ELD OF PA SP 12121212
Secondary:	



- Date:** The system default is the current date. To backdate the claim, click the drop-down menu to change to the desired date.

Dates / Diagnosis:

Service date(s): 8/27/2014 to: 8/27/2014

Mod -25 TOS: 1  Convert labs to: 5

Mod -33  Use vaccine DX Find encounter DX

- **ICD-10:** Click the **Add** button  and enter the numeric code or description to search under the ICD-10 Desc field. Then, click the **Save** button  to add the diagnosis code to the claim. Up to twelve diagnosis codes can be placed on a claim.
- **CPT:** Enter the numeric **CPT code** or click the **Ellipsis** button to search for the code.
- Diagnosis codes must be assigned to each CPT code line. Use the drop-down menu to select the diagnosis code or add modifiers.

Add/Edit Charges: MARY TESTPATIENT (99) Sex: F DOB: 05/16/2015 Age: 4 yrs. 0 mos. Ins: CIGNA PPO

Basic Information | Other Items (1-27) | Institutional (837I) Items

Participants:

Patient PCP: DD9 DEMO DOCTOR 107

Assisted by: [dropdown] 0

Rendered by: SJK Sloan J. Knox, MD 305

Supervised by: [dropdown] 0

Billing provider: SJK Sloan J. Knox, MD 305

Billing staff: CAM CINDY DODSON 1874

Location:

Place of service: Office

Facility ID: [dropdown]

Hospital dates: [dropdown] to: [dropdown]

Office location: Primary Location

Payer(s):

Primary: CPP SP CIG123456789

Secondary: AHM W123456789

Dates / Diagnosis:

Service date(s): 5/24/2019 to: [dropdown]

Mod -25 TOS: 1  Convert labs to: 5

Mod -33  Use vaccine DX Find encounter DX

ICD-10 Description ICD-10

Click here to add a new diagnosis

Streptococcal pharyngitis J02.0

Patient responsibility:

waived for preventive care

Co-pay:

PCP Visit 25.00

Well Visit [dropdown]

After-Hours [dropdown]

Specialist [dropdown]

Lab [dropdown]

Co-insurance:

\$11.07 x 0%

Deductible/Self-pay:

All procedures

Satisfied for policy year

Add CPT: [dropdown] Vax admin: 90460/1, pairwise antigens Modify Balance: \$219.00 Credits: \$144.00 Apply Payments

Service Date	CPT	Mod1	Description	DX 1	DX 2	DX 3	DX 4	Unit Charge	Units	Charge	Payer Allowable	Pat Only	Pat Resp	EPSDT	EPSDT Referral	NDI
05/24/2019	99213		OFFICE/OUTP	J02.0				119.00	1	119.00	54.49	<input type="checkbox"/>				
05/24/2019	87880		STREP A ASSA	J02.0				58.00	1	58.00	11.07	<input type="checkbox"/>				

Claim: 100195 Transactions in the claim: 2 Save + Queue Save Cancel



**Note:**

- Once all charges have been entered click the **Save** or **Save + Queue** button in the bottom right hand corner of the Add/Edit Charges screen.