

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**

Edit or Void Current Charges

Last Modified on 12/30/2020 3:34 pm EST

Version 14.19

Overview

Current superbill charges (charges that have not yet been included on a Daysheet) can be edited from Tracking or from the Patient Chart. However, if current charges need to be voided, this can only be done directly from the Patient Chart.

Edit Current Charges from Tracking

Depending on whether or not the charges have been posted (converted to a claim), navigate to the **Posted charges** or **Unposted charges** section of the Billing Panel and complete the following:

To edit posted charges:

1. Select a **charge line** that needs to be edited and click the **Edit** button. The **Add/Edit Charges** window is displayed.
2. Make the necessary edits.



Note: CPT codes, modifiers, charge amounts, diagnosis codes, place of service, service dates, and providers can be edited. Changes can also be made to the items in the Other items tab. For more information on those fields, [click here](#). Edits should be consistent with the provider's visit note and the provider should create an addenda to the note.

3. Click **Save** or **Save + Queue** depending on your practice's workflow.

To edit unposted charges:

1. Select a **charge line** that needs to be edited and click the **Edit** button. The **Superbill - Pending Procedures** window is displayed.
2. Make the necessary edits.
3. Click the **Exit** button. The unposted charges are updated to reflect your edits.

Edit Current Charges from the Patient Chart

Depending on whether or not the charges have been posted (converted to a claim), navigate to the **Posted charges** or **Unposted charges** section of the Charges window in the Patient chart and complete the following:

To edit posted charges:

1. Select the charge from the **Current (Posted) Charges / Payments** section of the window. You only need to select one line for the date of service.
2. Click the **Edit** button. The **Add/Edit Charges** window is displayed.
3. Make the necessary changes.
4. Click the **Save** or **Save + Queue** button depending on your practice's workflow.

To edit unposted charges:

1. Select a **charge line** that needs to be edited and click the **Edit** button. The **Superbill - Pending Procedures** window is displayed.
2. Make the necessary edits.
3. Click the **Exit** button. The unposted charges are updated to reflect your edits.

Void Current Charges



Warning: There is no audit trail or tracking of current charges that have been voided. The voiding of current charges should be done with caution.

1. Navigate to the Charges in the Patient Chart: **Clinical, Practice Management, or Billing tab > Patient Chart button > Charges**.
2. From the **Superbill (Unposted) Charges** section or the **Current (Posted) Charges / Payments** section of the window, select the **Charge Line** that should be voided. If more than one charge line should be voided, select them one at a time.
3. Click the **Delete** button to void a single line or **Delete All** to void **all lines** in the **Current (Posted) Charges / Payments** section.



Warning: Current payments and adjustments will also appear in the **Current (Posted) Charges / Payments** section of this window. If payments and/or adjustments are shown, and you select **Delete All**, the payments and/or adjustments that are listed will also be voided.

4. Click the **OK** button to confirm you want to delete the selection(s).


Version 14.10

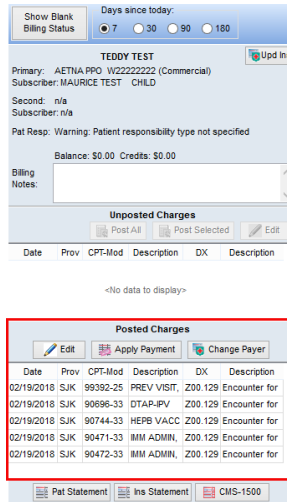
Overview

Current charges (charges that have not yet been included on a daysheet) can be edited from the **Tracking** tab, the **Patient Account**, or the **Claims + A/R** tab in the Billing Center. Current Charges can be voided from the Patient Account only.

Edit Current Charges from the Tracking Tab

To edit current charges from the **Tracking** tab:

1. Ensure that the checkbox to **Show Billing Reconciliation** is selected
2. Navigate to the **Posted charges** section
3. Select a **Charge Line** and click the **Edit** button . The Add/edit Charges window is displayed.



- 4. Make any necessary changes
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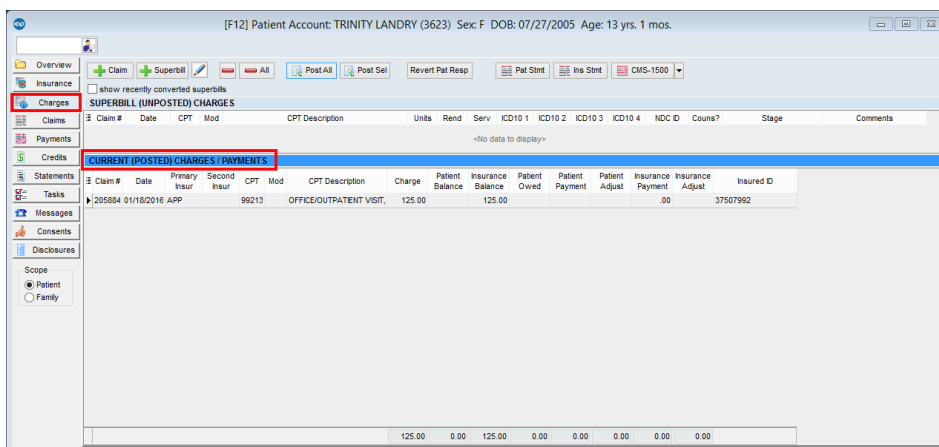
Note: Some of the items that can be edited include CPT codes, modifiers, charge amounts, diagnosis codes, place of service, service dates, and providers. Changes can also be made to the items in the Other items tab. For more information on those fields, [click here](#). If you are making edits, make sure that they are inconsistent with the provider's visit note and that the provider creates an addenda to the note.

- 5. Click the **Save** or **Save + Queue** button depending on your practice's workflow.

- **Edit Current Charges from the Patient Account**

To edit charges from the Patient Account:

1. From the **Smart Toolbar**, click the **Acct** button
2. Click the **Charges** tab
3. From the **Current (Posted) Charges/Payments** section, select the **Charge** . You only need to select one line for the date of service.
4. Click the **Edit** button. The **Add/edit Charges** window is displayed.




- 6. Click the **Edit** (pencil icon) button
- 7. Make any necessary changes
- 8. Click the **Save** or **Save + Queue** button depending on your practice's workflow

- **Edit Current Charges from the Billing Center**

To edit charges from the **Claims + A/R** tab of the Billing Center:

1. From the **Smart Toolbar**, click the **Billing** button
2. Click the **Claims + A/R** tab
3. From the **Stage** drop-down menu, select **Not Daysheeted, new claims only**
4. If you know which claim needs to be edited, select it. Otherwise, click the **small plus sign** next to the claims you would like to review and select a **Claim**.
5. Click the **Edit** (pencil icon) button. The **Add/Edit Charges** window is displayed.
6. Make any necessary changes.
7. Click the **Save** or **Save + Queue** button depending on your practice's workflow


- **Void Current Charges**

 **Warning:** Before proceeding with the process for voiding current charges, be aware that there is no audit trail or tracking of charges that have been voided.


If you determine that current charges should be voided, this can be done from the **Charges** tab or the **Claims** tab of the Patient Account.

Void Current Charges from the Charges tab of the Patient Account

1. Navigate to the **Charges** tab of the patient's account
2. Navigate to the **Current (Posted) Charges/Payments** section of the window
3. Select the **Charge Line** that you want to void. If more than one Charge line needs to be voided, select them one at a time.
4. Click the **red minus sign** to void a single line or **- All** to void **all lines**

 **Warning:** Current payments and adjustments will also be displayed in the Current (Posted) Charges/Payments section of this window. If payments and/or adjustments are shown, and you select **-All**, the payments and/or adjustments that are listed will also be voided.

9. Click the **OK** button in the **Confirmation** box to **Delete ALL current transactions**

 **Note:** If your intention is to void current charges because they were posted in error, refer to [Unposting Superbills](#) for instructions on how to revert charges to unposted.

Void Current Charges from the Claims tab of the Patient Account

1. Navigate to the **Claims** tab of the patient's account
2. Click the **small plus sign** to expand the claim where the charges should be voided if the claim is not already expanded. Notice that the transactions are displayed in blue text, indicating they have not yet been included on a daysheet.
3. Select the **Charge Line** that should be voided. If more than one Charge line should be voided, select them one at a time.
4. Click the **- Void** button to void a single line
5. Click the **OK** button in the **Confirmation** box to **Delete the highlighted transaction**

- Version 14.8

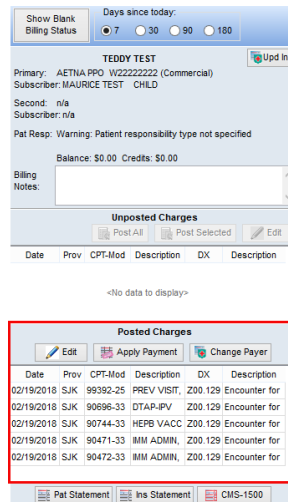
Overview

Current charges (charges that have not yet been included on a daysheet) can be edited from the Tracking tab, the Patient Account, or the Claims + A/R tab in the Billing Center. Current Charges can be voided from the Patient Account only.

Edit Current Charges from the Tracking Tab

To edit current charges from the **Tracking** tab:

1. Ensure that the checkbox to **Show Billing Reconciliation** is selected
2. Navigate to the **Posted charges** section.
3. Select a **Charge Line** and click the **Edit** (pencil icon) button. The **Add/edit Charges** window is displayed.



- 10. Make any necessary changes.

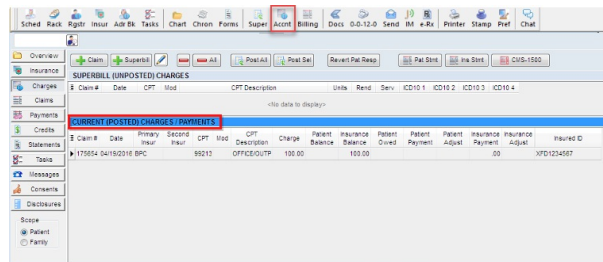
Note: Some of the items that can be edited include CPT codes, modifiers, charge amounts, diagnosis codes, place of service, service dates, and providers. Changes can also be made to the items in the Other items tab. For more information on those fields, [click here](#). Be sure that if making edits that are inconsistent with the provider's visit note, that the provider creates an addenda to the note.

11. Click **Save** or **Save + Queue** depending on your practice's workflow.

Edit Current Charges from the Patient Account

To edit charges from the Patient Account:

1. From the **Smart Toolbar**, click the **Acct** button
2. Click the **Charges** tab
3. From the **Current (Posted) Charges/Payments** section, select the **Charge**. You only need to select one line for the date of service.
4. Click the **Edit** button. The **Add/edit Charges** window is displayed.




- 12. Click the **Edit** button
- 13. Make any necessary changes
- 14. Click the **Save** or **Save + Queue** button depending on your practice's workflow.

- **Edit Current Charges from the Billing Center**

To edit charges from the Claims + A/R tab of the Billing Center:

1. From the **Smart Toolbar**, click the **Billing** button
2. Click the **Claims + A/R** tab
3. From the **Stage** drop-down menu, select **Not Daysheeted, new claims only**.
4. If you know which claim needs to be edited, select it. Or, click the **small plus sign** next to the claims you would like to review and make your selection.
5. Click the **Edit** (pencil icon) button. The **Add/edit Charges** window is displayed.
6. Make any necessary changes
7. Click the **Save** or **Save + Queue** button depending on your practice's workflow


- **Void Current Charges**

 **Warning:** Before proceeding with the process for voiding current charges, be aware that there is no audit trail or tracking of charges that have been voided. The charges simply disappear from OP 14. If charges are voided in error, you would have to manually add them back in. For instruction on manually adding charges, [click here](#).

If you determine that current charges should be voided, this can be done from the Charges tab or the Claims tab of the Patient Account.

Void Current Charges from the Charges tab of the Patient Account

1. Navigate to the **Charges** tab of the patient's account
2. Navigate to the **Current (Posted) Charges/Payments** section
3. Select the **Charge Line** that should be voided. If more than one **Charge Line** should be voided, to select them one at a time.
4. Click the **red minus sign** to void a single line or **- All** to void all lines in the **Current (Posted) Charges/Payments** section.

 **Warning:** Current payments and adjustments will also appear in the Current (Posted) Charges/Payments section of this window. If payments and/or adjustments are shown, and you select **-All**, the payments and/or adjustments that are listed will also be voided.

15. Click the **OK button** in the **Confirmation** box to **Delete ALL current transactions**.

- **Void Current Charges from the Claims tab of the Patient Account**

1. Navigate to the **Claims** tab of the patient's account.
2. Click the **small plus sign** to expand the claim where the charges should be voided if the claim is not already expanded. Notice that the transactions appear in blue text, indicating they have not yet been included on a Daysheet.
3. Select the **Charge Line** that should be voided. If more than one **Charge Line** should be voided, you will need to select them one at a time.
4. Click the **- Void** button to void a single line
5. Select **OK** button in the **Confirmation** box to **Delete the highlighted transaction**