Charge Posting Options

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Version 14.19

Overview

The sections below provide information on the different options available for posting charges and for saving the charges after you've reviewed them in the **Add/Edit charges** window.

Posting Options and Where They're Available

Posting Option	Definition	Tracking	Chart	Billing Center
Auto-Post	A system preference that can be disabled if desired; allows users to post all charges in one click. The **Add/Edit Charges** window does not open for you to review or edit charges, but edits may still be made to the posted charges by clicking the **Edit** button for the posted charges. The **Edit** button reopens the **Add/Edit Charges** window where edits can be made and saved.	X	-	-
Post All * See **Note** below	Allows users to post all charges for the patient that are listed as unposted charges. The **Add/Edit Charges** window opens so users can edit charge information.	X	X	X
Post Selected	Allows users to split the charges to create multiple claims. To select the charges: 1. Hold down the Ctrl key on your keyboard. 2. Click on the claim lines to highlight the charge lines that you want to post. 3. Click the **Post Selected** button. When posting selected charges, the system will then prompt the question "Split the highlighted charges to a separate claim?".	X	X	X
Edit	Allows users to view and make edits to the electronic superbill information prior to posting the charges.	X	X	X

📌 **Note**: If **Post All** is selected when charges for more than one visit for the same date of service are listed (i.e. the same child returned and saw another provider on the same date), a Warning confirmation box is displayed to alert the biller that **Post Selected** should be used.
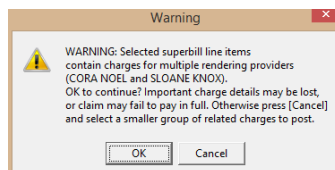
If you click the **OK** button, all charges will be pulled onto the same claim, but only one provider will be displayed on the claim (the first to have seen the patient). If you click the **Cancel** button, you can select which charges should be billed

together and then select **Post Selected**. The corresponding Billing Provider will appropriately attach to each claim. The same functionality applies when posting charges from a patient's account.

Posting Options to Save Charges

Once charges have been reviewed in the **Add/Edit Charges** window, you will be presented with three options regarding how you would like to save the charges and exit the window. Once one of the above buttons is clicked, the charges will be displayed as **Posted Charges**. For information on how to edit current posted charges (those which have not been archived on a daysheet), click **here**.

| Button / Function	Definition
Save + Queue	Saves the claim and places it in the Transmit Queue.
Save	saves the claim, but does not place the claim in the Transmit Queue. Click **here** to learn how to then move the claims to the Transmit Queue.
Cancel	Saves the claim, but does not place the claim in the Transmit Queue.

Version 14.10

Overview

The sections below define the posting options available prior to reviewing the charges and the options available for saving and queuing the charges.

Posting Options Available Prior to Reviewing Charges

The following options appear in the tracking window where charges may be posted. **Post All** and **Post Selected** exist in the Billing Center and Patient Account. Knowing the differences between the buttons will allow you to develop a workflow that works best for the practice.

- The **Auto-Post** button, a system preference that can be disabled if desired, allows users to post all charges in one click. The **Add/Edit Charges** window does not open for you to review or edit charges, but edits may still be made to the posted charges by clicking the **Edit** button located in the Posted Charges section of the window. The Edit button will reopen the **Add/Edit Charges** window where edits can be made and saved.
- The **Post All** button allows users to post all charges for the patient that are listed in the unposted charges section of the window. The **Add/Edit Charges** window will open so users can edit charge information.

If **Post All** is selected when charges for more than one visit for the same date of service are listed (i.e. the same child returned and saw another provider on the same date), a warning box appears to alert the biller that Post Selected should be used.
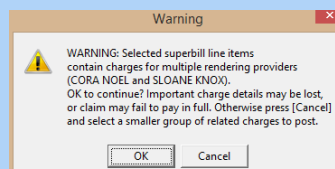
By clicking **OK**, all charges will be pulled onto the same claim. However, only one provider will appear on the claim (the first to have seen the patient). By clicking **Cancel**, you will have the opportunity to select which charges should be billed together and then select **Post Selected**. The corresponding Billing Provider will appropriately attach to each claim. The same functionality applies when posting charges from a patient's account.

- The **Post Selected** button allows users to split the charges to create multiple claims. To select the charges:

  1. Hold down the Ctrl key on your keyboard.
  2. Click on the claim lines to highlight the charge lines that you want to post.
  3. Click the **Post Selected** button. When posting selected charges, the system will then prompt the question "Split the highlighted charges to a separate claim?".

- The **Edit** button in the unposted charges section of the window allows users to view and make edits to the electronic superbill information prior to posting the charges.

Posting Options to Save Charges

Once charges have been reviewed in the **Add/Edit Charges** window, you will be presented with three options regarding how you would like to save the charges and exit the window.

- **Save + Queue**: saves the claim and places it in the Transmit Queue.
- **Save**: saves the claim, but does not place the claim in the Transmit Queue. Click **here** to learn how to then move the claims to the Transmit Queue.
- **Cancel:** saves the claim, but does not place the claim in the Transmit Queue.

Once one of the above buttons is clicked, the charges will be listed under the **Posted Charges** heading. For information on how to edit current posted charges (those which have not been archived on a daysheet), click **here**.