Manually Enter a Superbill

Last Modified on 05/28/2020 1:37 pm EDT

Version 20.3

> **Path: Clinical, Practice Management, or Billing tab > Patient Chart button > Charges > New Superbill button**
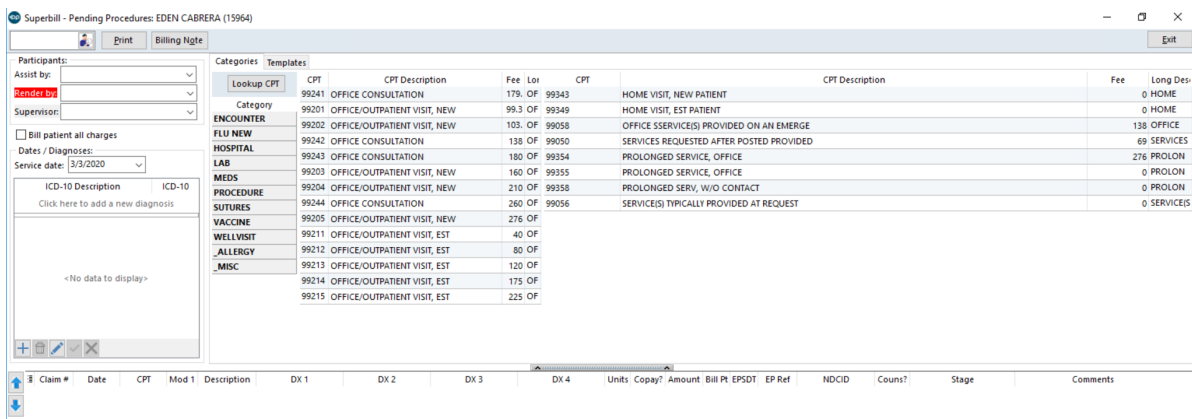> **Path: Clinical tab > Superbill button > Charges > New Superbill button**

Overview

Superbill charges are automatically passed from the clinical team as they complete their documentation; however, it may be necessary to manually enter superbill charges. If a user find that they are repeatedly entering the same charges, they may consider creating a Superbill Template to streamline the process.

Manually Enter Superbill Charges

1. Navigate to the **Superbill- Pending Procedures** window by following one of the paths above. If you have not yet searched for and selected a patient, you will need to do so before proceeding. The patient's name is displayed at the top of the window.

2. Enter the following information:

   - **Assist by**: This is the staff member who assisted during encounter (optional).
   - **Render by**: This is a required field and indicates the provider who rendered services.
   - **Supervisor**: This field is only required when the Rendering provider requires a Supervising provider.
   - **Bill patient all charges**: Select this checkbox if all charges are the patient's responsibility and should not be sent to the insurance.
   - **Service Date**: This date defaults to the current date. It may be changed to a prior date in case of back entry.

3. In the Diagnosis section of the window, click the **Add** button ➕ to add a diagnosis code.
4. Search for and select the diagnosis code(s):

   a. Click in the blank **ICD-10 Description** field or the **ICD-10** field.
   b. Entering a description (in the Description field) or the code (in the ICD-10 field).
   c. Click the DX Search button.

   d. Select the code.
   e. Click the **Save** button ✓ .
   f. Repeat until all diagnosis codes have been added to the diagnosis section.

5. Add the CPT Code(s):

   a. Click to select a Category. The codes included in the electronic superbill are displayed.
   b. Double-click a code from the list displayed.
   c. Repeat until all codes have been added to the superbill.

   OR

   a. Click the **Lookup CPT** button. The CPT Code window is displayed.
   b. Search for and select the CPT Code(s) to add to the superbill.
   c. Repeat until all codes have been added to the superbill.

> 📌 **Note**: If the same CPT code should be billed twice for a medication, but the NDC ID differs for the two instances of the code, you must manually enter the NDC ID that is not housed in the CPT code table for that particular CPT.

6. Confirm the correct **DX 1-DX 4** fields are populated for each CPT code.
7. Edit the following fields, if necessary:

   - Units
   - Bill Pt
   - EPSDT
   - EP Ref
   - POS
   - NDC ID

> 📌 **Note**: The NDC ID field in this form will be blank. If you are entering the CPT code for a vaccine whose NDC ID would normally be pulled from the Vaccine Inventory, you must manually enter the NDC ID when entering superbill charges. If you are entering a medication CPT code whose NDC ID is housed in the CPT Code Table, you will see that ID populated on the claim once the charges have been converted (not in the Add/Edit Charges window).

   - Couns?

8. Select a **Stage** for the superbill. The default selection is **Ready**', but can be changed to indicate if the superbill is not yet ready to be converted.
9. Enter any comments, if necessary.
10. Click the **Exit** button. The unposted superbill is displayed in the**Superbill (Unposted) Charges** section of the **Charges** window in the patient chart and in the**Superbills** tab of the Billing Center.

Create a Superbill Template

Superbills entered manually may also be saved as a template to use for future use for other patients. To save a superbill as a template:

1. Create the superbill following the steps above.
2. Click the **Templates** tab.
3. Click the **Add** button located the the bottom of the Template Name section.
4. Enter a name for the template.
5. Click the **OK** button. The template is saved to include the DX and CPT codes, but the provider and service date will still need to be selected when the template is used.

To use a saved superbill template:

1. Navigate to the **Superbill- Pending Procedures** window.
2. If not already selected, search for and select the patient.
3. Click the **Templates** tab.
4. Select the temple to use.
5. Click the **Use** button.
6. Click **Exit**.

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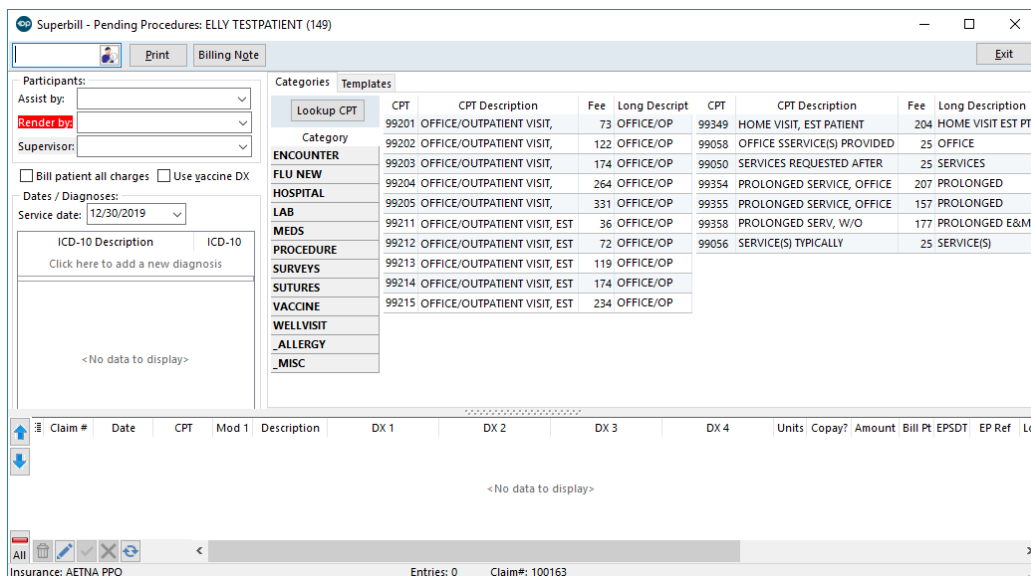>
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- **Supervisor**: This field is not required, but should be completed with a Supervising provider, when applicable.
- **Bill patient all charges**: Select this checkbox if all charges are the patient's responsibility and should not be sent to the insurance.
- **Use vaccine DX**: Select this checkbox if immunizations should be assigned diagnosis code Z23.
- **Service Date**: This date defaults to the current date. It may be changed to a prior date in case of back entry.

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6. Click **Exit**.