> **Important Content Update Message**
> We are currently updating the OP Help Center content for the release of OP 20. OP 20 (official version 20.0.x) is the certified, 2015 Edition, version of the Office Practicum software. This is displayed in your software (**Help tab > About**) and in the Help Center tab labeled Version 20.0. We appreciate your patience as we continue to update all of our content.

Set Superbill Stage Defaults

Last Modified on 02/06/2020 1:54 pm EST

Version 20.0

> **Path: Admin tab > Global Preferences > Billing tab > Superbill tab**

Overview

In an effort to streamline the progression of superbills through Superbill Stages, a practice may choose to set a global-level System Preference to determine the stage of Superbills when a note with charges is saved and when it is finalized. This stage is reflected in both the Charges section of the Patient Chart and the Tracking Schedule.

Set Superbill Stage For Saving a Note

To select the default Superbill Stage that is applied when creating charges and when a note is saved with charges:

1. Navigate to the Superbill tab of the System Preferences window by following the path above.
2. Use the drop-down located below **Superbill stage when creating and saving a note with charges** to select the default Superbill Stage.
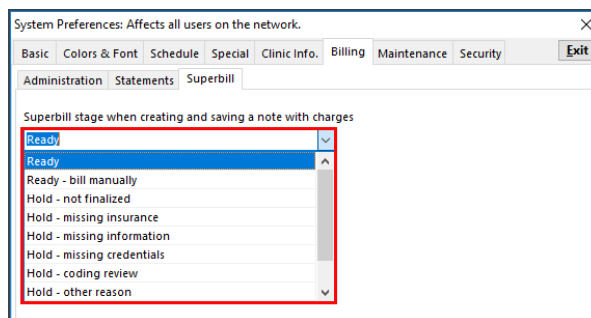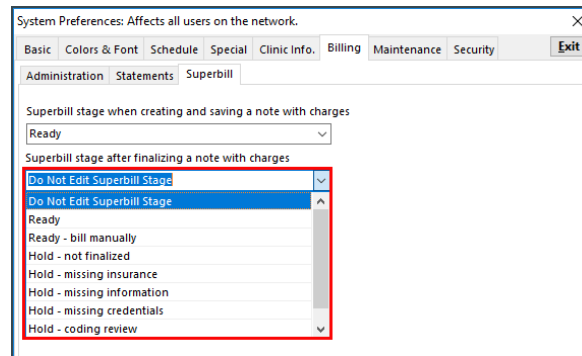

3. Click the **Exit** button to save the selection and close the System Preferences window.

Set Superbill Stage For Finalizing a Note

To select the default Superbill Stage that is applied when a note is finalized with charges:

1. Navigate to the Superbill tab of the System Preferences window by following the path above.
2. Use the drop-down located below **Superbill stage after finalizing a note with charges** to select the default Superbill Stage.

3. Click the **Exit** button to save the selection and close the System Preferences window.

> 📌 **Note**: The Superbill Stage is triggered at the time of note finalization. If a note requires a cosignature, the process of having the note reviewed must occur before the note is finalized by the Rendering Provider.

Workflow Example: Practice posts charges as soon as the note is finalized

If your practice posts charges when the visit note is finalized, make the following selections:

- **Superbill stage when creating and saving a note with charges:** Hold- not finalized
- **Superbill stage after finalizing a note with charges:** Ready

An additional indicator can be added to the charges as a Billing Status. In the Coding section of the visit note, the provider can select the status of **Ready to Bill** when they are completing their note. This status is displayed in the Tracking Schedule window. By following this workflow, charges are marked with a Billing Status of **Ready to Bill** and a Superbill Status of **Ready**.

Workflow Example: Practice has staff review coding before posting charges

If your practice has staff that reviews coding before posting superbill charges, make the following selections:

- **Superbill stage when creating and saving a note with charges:** Hold- not finalized
- **Superbill stage after finalizing a note with charges:** Hold- coding review

This indicates to the staff responsible for the coding review that the charges are ready for review. Once the coding review is complete, the coding staff should change the Superbill Stage to **Ready** (or **Do Not Edit Superbill**) and the Billing Stage to **Ready to Bill**.