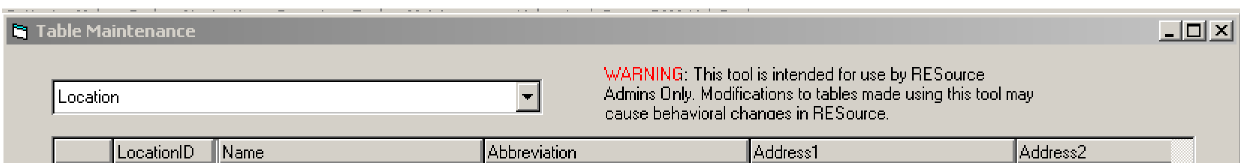
SuperBill

Admin Set Up

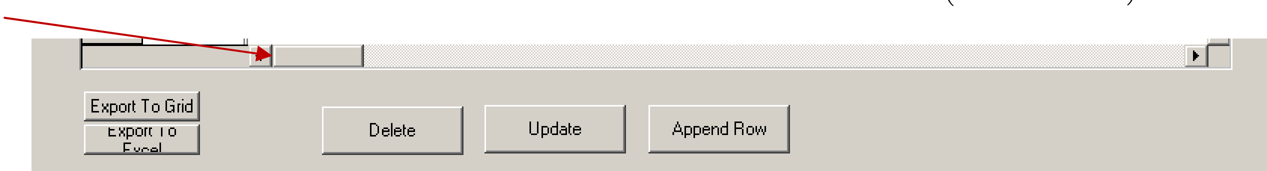
There are administrative tasks that need completing for a Superbill to be setup for user accessibility. In the SuperBill, selection lists need to be assigned for several drop down menus such as Locations, Providers, ICD-9, CPT, and Credit Cards. After these are defined, a user will be able to select several items from the drop down menus.

Locations

Office Locations are added and edited in **Lookup Table Manager**. On the Main Toolbar in REsource, select **Maintenance**, **Admin**, **Lookup Table Manager**, and select **Location** from the dropdown



Note the scroll bar at the bottom of the window to view all fields in this table (red arrow below)



To Add a Location:

1. Click Append. This creates a new highlighted row at the bottom of the already established entries.
2. Select the Location ID field in this highlighted row and enter the next consecutive ID (red highlighted column)
3. Hit Tab and the next field, Name will be highlighted for you to enter the name of your facility.
4. Hit Tab again and the next field, Abbreviation will be highlighted for you to enter an assigned abbreviation for this ID.

5. Continue to Tab over, filling the designated fields with appropriate information until the record is completed.

6. Click Update

To Edit a Location:

1. Click on the record and make necessary changes to applicable fields (i.e. Address1)

2. Click Upate

To Delete a Location:

1. Click on the record to be deleted

2. Click Delete

3. Click Yes at the prompt

Note: You cannot delete Locations that are being used in the system. To remove such a Location from any available dropdowns you can check off the Retire checkbox. This will make it unavailable for future use but will not affect any previous records.

Providers

By default, any user belonging to the MD permissions group will appear in the SuperBill Provider dropdown. Providers, like all users, are added, edited and updated in the User Manager. On the main Toolbar in REsource, select **Maintenance**, **Admin**, then **User Manager**. For detailed information on how to use the User Manger please contact Med Software.

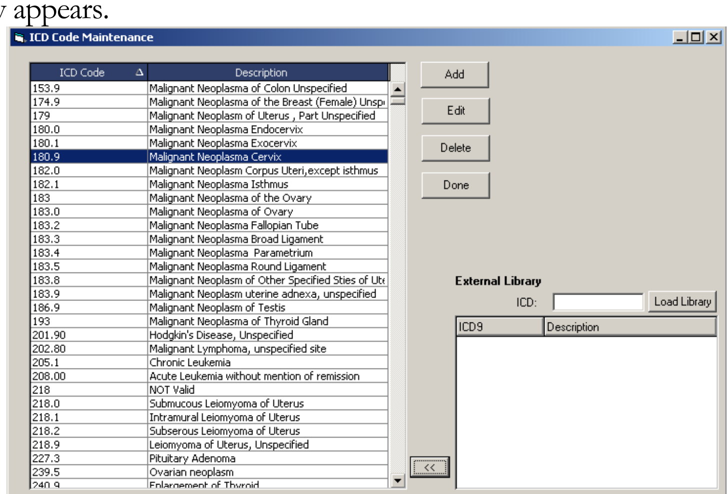
If a practice has more than one location, you have the option of altering the superbill providers that appear in the Provider dropdown based on the location selected in the Location dropdown. This function is generally not to be used for satellite locations but rather for select services provided by a separate entity. For example, perhaps your facility affiliates with a counseling center or nutritionist. They are a separate company but share in patient care and have access to Resource information and superbills. If you are interested in implementing this option, please contact Med Software.

ICD/Diagnosis

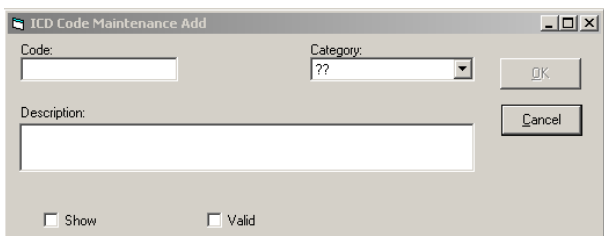
ICD-9/ICD-10 codes for the superbill diagnoses list are managed via **Maintenance**, **Admin Finance** from the main Toolbar in REsource.

To Add ICD-9 Codes:

1. Click on **Maintenance**, **Admin Finance**, then **ICD Codes**. The ICD Code Maintenance window appears.



2. Click **Add**. This brings up the **ICD Code Maintenance Add** window.



- **Code** – ICD code that represents the diagnosis
- **Category** - the category the diagnosis is grouped under. Options in this dropdown can be added/edited via the Lookup Table Manger – lkupICDCategories.
- **Description** - Use this field to write worded description of the diagnosis
- **Show** – when creating a superbill there is are two windows from where a user can select a diagnosis – the primary window generally contains the more commonly used diagnoses while the secondary window contains those less commonly used. When 'Show' is selected the diagnosis will be listed in the primary window. If this box is not selected, the diagnosis will be displayed in the secondary window.
- **Valid** - Click on this box to mark the diagnosis as active. Uncheck this for any codes no longer being used.

3. Click **OK.** You will return to the ICD Code Maintenance window.

4. Click **Done**

To Edit ICD-9 Codes:

1. In the ICD Code Maintenance window, select the record to be edited

2. Click **Edit.** The ICD Code Maintenance Edit window will pop up.

3. Edit the field(s) in this record that you wish to edit such as 'Code' or 'Description'.

4. Click **OK**

To Delete ICD-9 Codes:

1. In the ICD Code Maintenance Window, select the record to be deleted

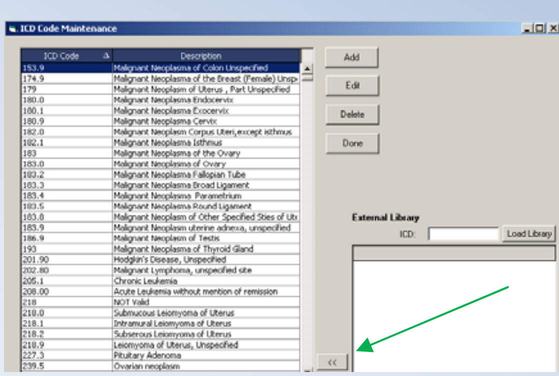
2. Click **Delete**

3. Click Yes when prompted

Note: You cannot delete ICD codes that are being used in the system. To remove such a code from any available lists you can uncheck the Valid checkbox. This will make it unavailable for future use but will not affect any previous records.

The ICD Code Maintenance window has a feature to import ICD-9/ICD-10 codes from an external source or "Library" – a spreadsheet for example. Note that this feature is also available for CPT codes. If you are interested in using this feature please contact Med Software for additional details.

- After importing, you can select ICD codes by highlighting or manually entering into the ICD: field. Use the << icon (green arrow) to move the selected ICD codes directly into the diagnoses list on the left side.

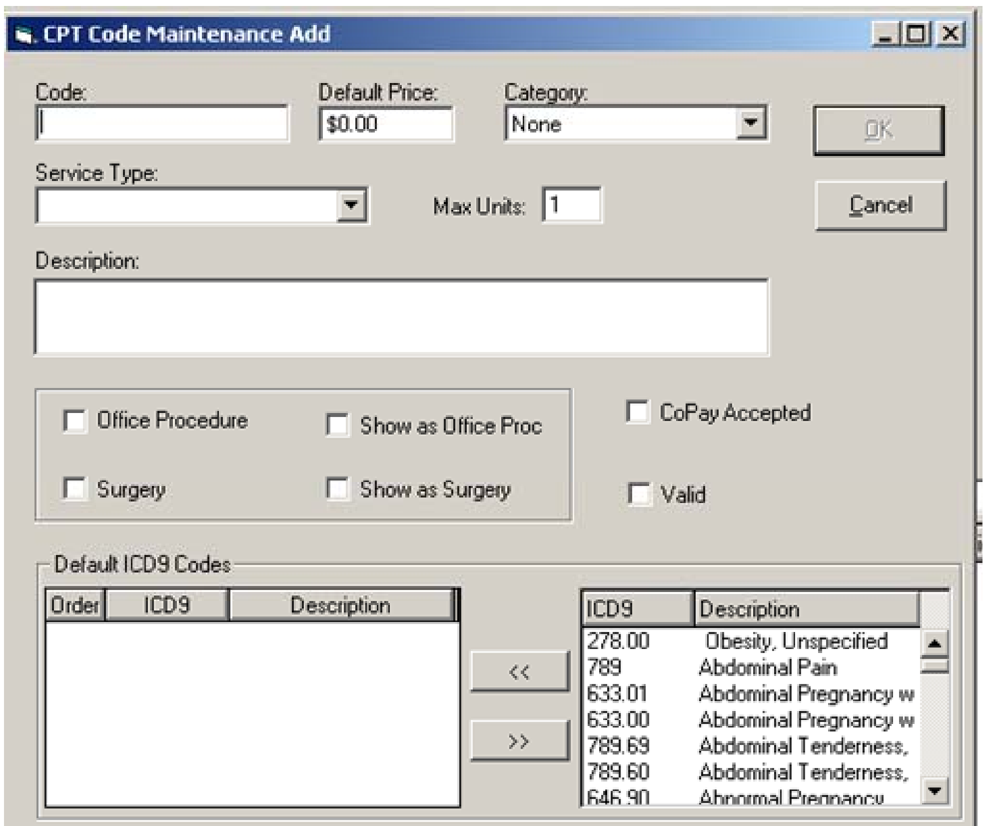


CPT Codes

CPT codes for the Office Procedures section of the SuperBill are also added from the Maintenance menu on the Main Toolbar in REsource.

1. Select **Maintenance**, **Admin Finance**, then scroll to **CPT Codes**

2. Click **Add** to add a new CPT or **Edit** to modify existing CPT code. The **CPT Code Maintenance** window appears.



- **Code** - CPT code that represents the procedure

- **Default Price** – price for procedure

- **Category** - the category the CPT is grouped under such as office visit or blood work. Options in this dropdown can be added/edited via the Lookup Table Manger – lkupCPTCategories.

- **Service Type** - the service type the CPT is grouped under such as Surgery or Consultation. Options in this dropdown can be added/edited via the Lookup Table Manger – lkupICDServiceTypes.
- **Max Units** - the maximum number of units that can be entered in the 'Units' field of the superbill when this CPT is selected.

- **Copay Accepted** - Click this box when a procedure warrants a copay. Certain procedures, such as venipuncture, may not require an office visit copay.

- **Valid** - mark the CPT as active. Uncheck this for any codes no longer being used.

- **Description** - enter description of the diagnosis

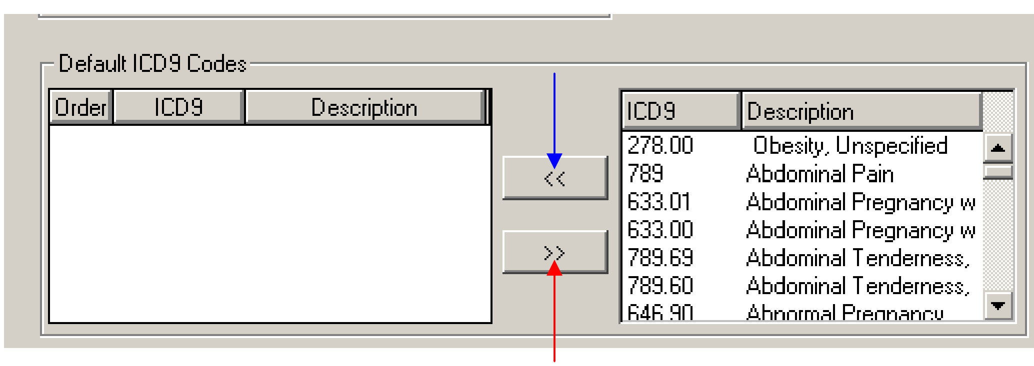
- **Office Procedure** - Select this box if the CPT code is to appear in the Office Procedure section of the superbill.

- **Show as Office Procedure** - when creating a superbill there is are two windows from where a user can select a CPT – the primary window generally contains the more commonly used procedures while the secondary window contains those less commonly used. When 'Show as Office Procedure' is selected the procedure will be listed in the primary window. If this box is not selected, the procedure will be displayed in the secondary window.

- **Surgery** - Select this box if the CPT code is to appear in the Surgeries section of the superbill

- **Show as Surgery** - This works in the same manner as 'Show as Office Procedure'

- **Default ICD9 Codes** - default ICD-9 codes that will automatically populate the Diagnosis section in the superbill when this CPT code is selected.



Availble ICD codes are are listed on the right and any ICD codes applied will be on the left. To add default ICD-9 codes, select the code(s) from the right and move it to the left using the << icon (blue arrow). To remove a default, select the code from the left and move it to the right using the >> icon (red arrow).

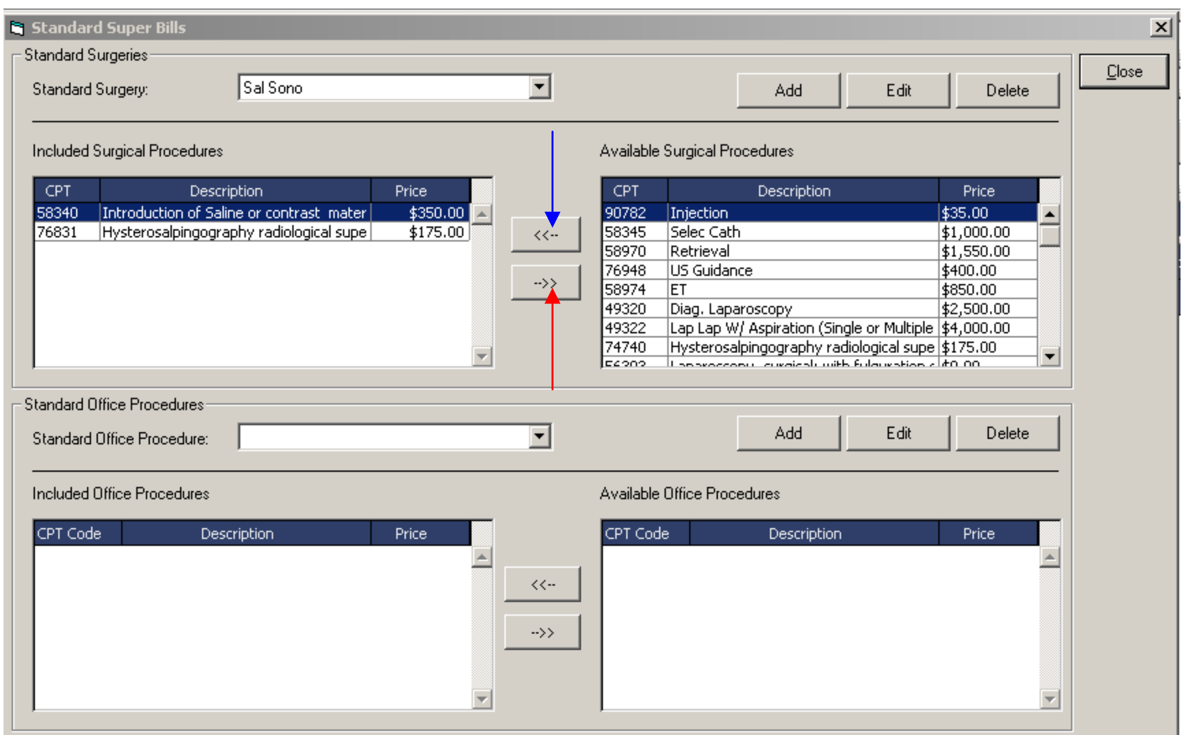
3. Click **OK**

SuperBill Shortcuts

In the 'Office Procedures' and 'Surgeries' sections of a superbill there are dropdown menus containing commonly grouped procedures. These drop down lists are located underneath the 'Add/Remove' buttons at the right of these sections. These shortcuts are added and edited in **Standard SuperBills**.

To create a Standard SuperBill (shortcut):

1. From the main Toolbar in REsource, select **Maintenance**, **Admin**, and scroll to **Standard SuperBill.** The Standard Superbills window appears.

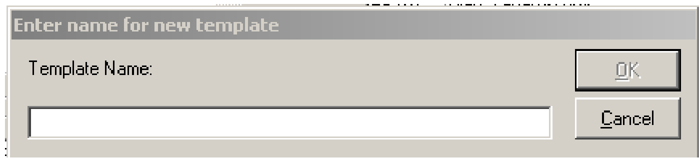


You can add, edit, and delete Standard SuperBill shortcuts in this window. There are two sections: Standard Surgeries and Standard Office Procedures which function the same way.

To Add a new Standard Surgery:

A. Click **Add** next to the 'Standard Surgery' drop down selection list.

B. Enter a name for your template when prompted and click **OK**



C. Available procedures are listed on the right. Select desired CPT code(s) from the 'Available Surgical Procedures' section and click the  button (blue arrow above) to move it to the 'Included Surgical Procedures' section. If you wish to remove CPT codes from a standard procedure, select it from the 'Included Surgical Procedures' section and click the  button (red arrow above) to move it back to the 'Available Surgical Procedures' list.'

2. Click Close if done, or click Add to create another shortcut

To Edit a Standard Surgery:

A. Select the desired standard surgery from the dropdown and click **Edit**

B. Add/remove CPTs as needed

C. Click Close if done, or click Add to create another shortcut

To Delete a Standard Surgery, select it from the dropdown and click **Delete**

Standard Office Procedure:
Repeat the above steps to add/edit/delete Standard Office Procedure shortcuts.

Credit Card Types

In the 'Payment Info' section of the SuperBill, there is a drop down list for credit card types. Credit card types such as Visa or MasterCard are added and edited in **Lookup Table Manager**.

To add/edit credit card types:

1. From the main Toolbar in REsource, select **Maintenance**, **Admin**, **Lookup Table Manager**, and select **lkupCreditCardTypes** from the dropdown.

2. Click **Append Row**

3. Enter the next consecutive CreditCardTypeID (red column)

4. Enter the CreditCardType and click **Update**

To delete a credit card type, select it and click **Delete**

Note: You cannot delete credit card types that are already being used in the system. To remove such an item from any available lists you can check the Retired checkbox. This will make it unavailable for future use but will not affect any previous records.

Auto Gen

The Auto Gen (automatic generation) feature in the superbill allow users to insert diagnoses and billable procedures with a single click. In order for this to work, the cycle diagnoses and lab orders must be set up and utilized appropriately.

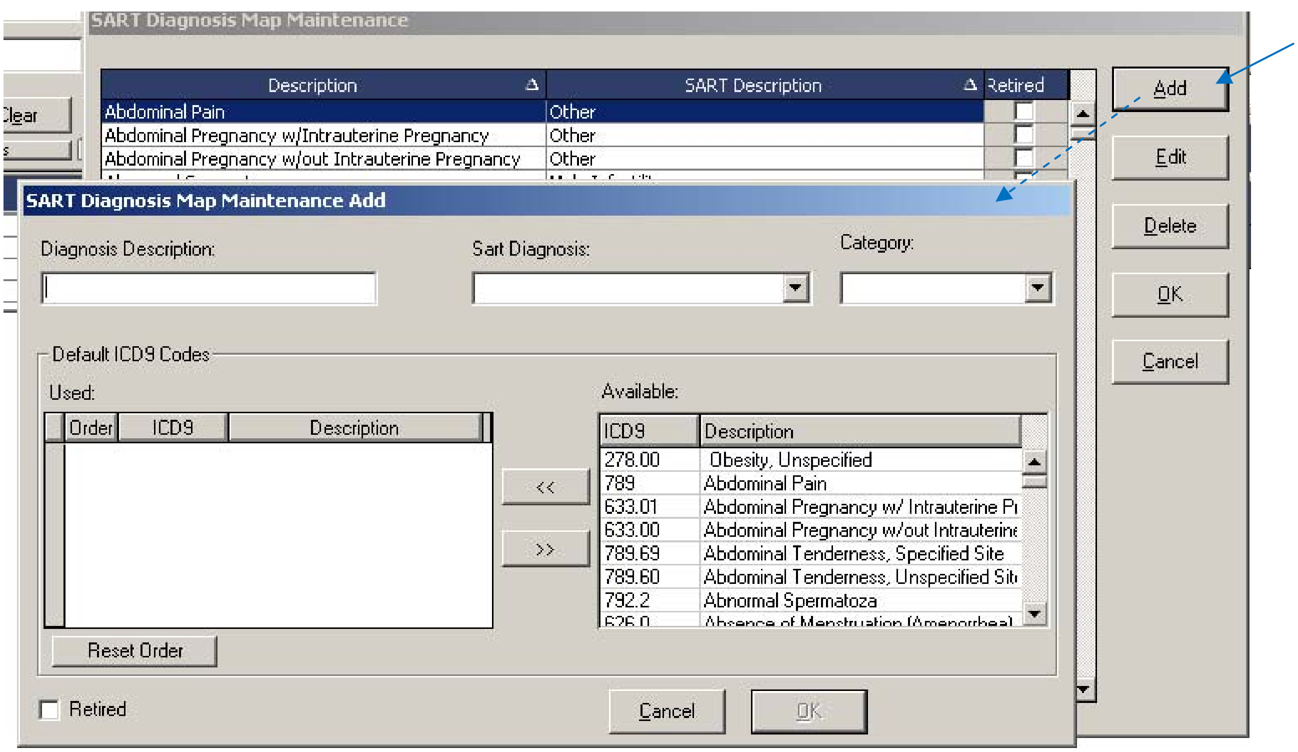
Cycle Diagnosis

The cycle diagnosis list is maintained under the Maintenance menu, Admin SART, SART Diagnosis Map. Here you create the cycle diagnoses you want available and map each one to a valid ICD code. By mapping each diagnosis to a code, the system is able to insert the corresponding ICDs into a superbill.

To Create/Map Cycle Diagnoses:

1 – in the main toolbar, go to Maintenance, Admin SART, SART Diagnosis Map. The SART Diagnosis Map Maintenance window will appear

2 – click Add (click Edit to alter an existing diagnosis). The SART Diagnosis Map Maintenance Add window will appear.



3 – enter the Diagnosis Description

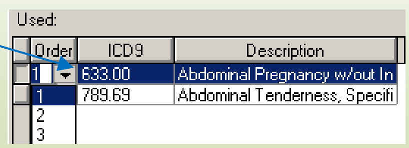
4 – select the SART Diagnosis from the dropdown list. The Sart Diagnosis options are maintained under the Maintenance menu, Admin SART, SART Diagnosis – from here you can add/edit/delete options.

5 – select the diagnosis Category. When searching for a diagnosis from a cycle, users will be able to filter their search lists by this category. The category options are maintained via the lkupDiagnosisCategories table in the Lookup Table Manager

6 – in the Default ICD 9 Codes section of the window, the available ICD codes are listed on the right and the used/applied ICD codes will be listed on the left. The ICD codes available are the same as described earlier in this document (Maintenance, Admin Finance, ICD Codes). Select a code from the Available section and click the 

button to move it to the Used section. You can assign more than one ICD code to a single cycle diagnosis.

If more than one ICD is applied to a single diagnosis you can adjust the order of appearance by clicking in the Order cell and selecting an order number from the dropdown list. Clicking the Reset Order button will return the ICD order to its original state.



7 – click OK

To Delete a Cycle Diagnosis:

1 – in the main toolbar, go to Maintenance, Admin SART, SART Diagnosis Map. The SART Diagnosis Map Maintenance window will appear

2 – click Delete

3 – click Yes to the 'Confirm Removal' prompt that appears

Note: You cannot delete cycle diagnoses that are already being used in the system. To remove such an item from any available lists you can check the Retired checkbox. This will make it unavailable for future use but will not affect any previous records. To access the Retired option, select the desired diagnosis in the SART Diagnosis Map Maintenance window and click Edit. Check off the Retired checkbox at the bottom of the Edit window.

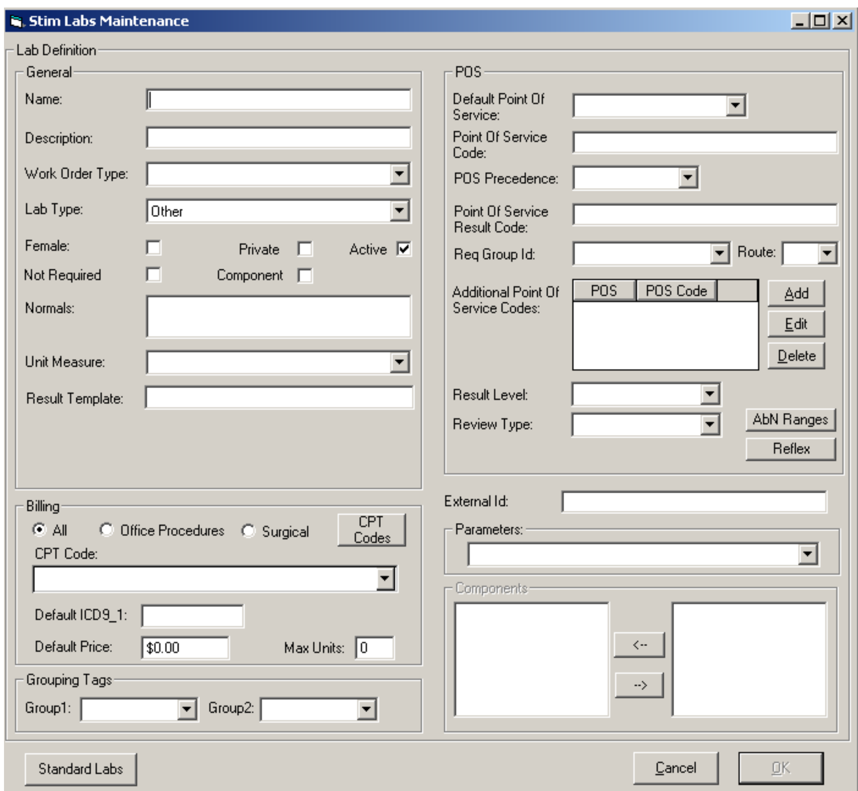
Lab Order

When using the Auto Gen feature in the superbill, the Office Procedures and Surgical Procedures sections are auto populated based on what exists in a lab order for the given date. So in order for all billable procedures to appear in the superbill they must all exist in a lab order – your lab order becomes more of an encounter form as opposed to just a place where lab items are ordered. Each billable procedure (including office visits) needs to exist in Stim Lab Maintenance, along with its corresponding CPT code and default ICD code, if applicable.

To Add/Edit a Lab Order item:

1 – In the main toolbar, select Maintenance – Admin – Stim Labs Maintenance

2 – In the Stim Labs Maintenance window that appears, click Add. Another window will open allowing you to create a new Lab item. Selecting an existing Lab item and clicking Edit will bring up the same window, allowing you to make changes to it.
The fields are described below. Any field with an asterisk (*) means it is one of the minimum required to create a new lab item for ordering/billing purposes. The others give additional functionality and are explained further in the Stim Labs Maintenance documentation.



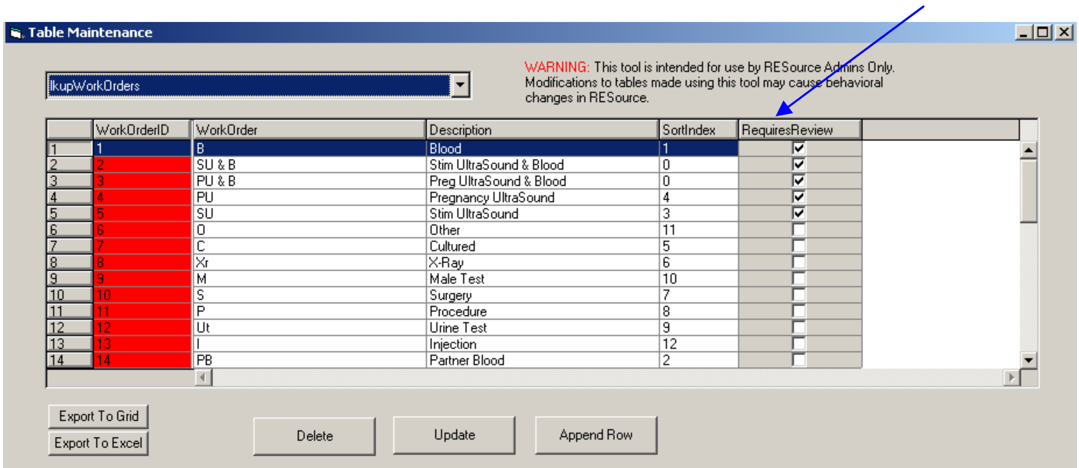
General

- ***Name** – the name of the lab item as you want it to appear

- **Description** – a description of the lab item, or comment

- ***Work Order Type** – an abbreviation representing the type of order, visible on the stim sheet. For example, B = Blood, M = Male testing, C = Culture.

  These work order types are customizable via the Lookup Table Manager. Go to the main menu and select Maintenance – Admin – Lookup Table Manager. In the Table Maintenance window that appears, choose lkupWorkOrders from the dropdown menu. All existing work order types and their description/definition will display.



	WorkOrderID	WorkOrder	Description	SortIndex	RequiresReview
1	1	B	Blood	1	☑
2	2	SU & B	Stim UltraSound & Blood	0	☑
3	3	PU & B	Preg UltraSound & Blood	0	☑
4	4	PU	Pregnancy UltraSound	4	☑
5	5	SU	Stim UltraSound	3	☑
6	6	O	Other	11	☐
7	7	C	Cultured	5	☐
8	8	Xr	X-Ray	6	☐
9	9	M	Male Test	10	☐
10	10	S	Surgery	7	☐
11	11	P	Procedure	8	☐
12	12	Ut	Urine Test	9	☐
13	13	I	Injection	12	☐
14	14	PB	Partner Blood	2	☐

  You will notice a Requires Review field (blue arrow) – if checked, the given WorkOrder type will put any lab it's associated with into Daily Review. So, for example, if 'B' requires review, any patient with a lab order containing a lab whose Work Order Type field is set to 'B' will appear in Review for that day.

  To add a new Work Order:
  1 – When in the lkupWorkOrders table, Click Append Row
  2 – Enter the next consecutive WorkOrderID (red column)
  3 – Enter the WorkOrder abbreviation
  4 – Enter the Description
  5 – Enter the SortIndex (the list will sort by number) – you can leave it set to zero if you have no preference
  6 – Check off RequiresReview if items of this type should be included in Daily Review
  7 – Click Update

- ***Lab Type** – unless the item corresponds to a specific type listed, click Other

- **Female** – check off for female or patient labs (versus male or partner labs)

Although 'Female' is used to indicate a patient vs. a partner lab, you may want to consider naming your labs in RESource with "patient" and "partner" instead of "female" and "male". Using these gender-neutral terms you can apply the lab orders to same-sex couples without confusion. For example, Cystic Fibrosis (patient) and Cystic Fibrosis (partner) as opposed to Cystic Fibrosis (female) and Cystic Fibrosis (male).

- **Private** – any lab checked as Private will not appear, by default, in any printed version of the lab log/medical records ('Lab Log w/ Privacy' must be selected when printing the Lab Log as part of Medical Records in order for Private labs/results to appear)

- ***Active** – if checked, the lab will appear as an orderable item in a lab order. Un-checking this field will "retire" the lab, leaving it associated with all previous patient records, but removing it from the orderable list in a lab order.

- **Not Required** – if checked, and the lab is part of a checklist, the item will not prevent the checklist from progressing to "Complete". "Not Required" will appear in parentheses after the item when it's displayed in the Outstanding items section. In most cases you will want to leave this un-checked.

- **Component** – if checked, the lab is not directly available for ordering. It can be added to another lab as a component (i.e. Venipuncture)

- **Normals** – textual description that appears in a lab order print-out, at the bottom of the lab log report and from the right click menu in the lab log

- **Unit Measure** – unit of measure for the lab item, for display purposes

- **Result Template** – if specified, then the template will appear on the lab order report following the given lab

Billing

- **All/Office Procedures/Surgical** – toggle buttons that will sort the CPT Code dropdown list (based on whether the CPT Code has been defined as an Office Procedure code or Surgical code)

- **CPT Codes button** – button that will display the CPT Code Maintenance window allowing you to add a CPT code if it is not available and/or edit an existing code. For more information on how to add CPT Codes, please refer to the CPT Code documentation under Maintenance in the IssueTrak Knowledge Base.

- **CPT Code** – dropdown list allowing you to select the CPT code for the lab item

- **Default ICD9_1** – the default diagnosis code for the lab item**.** Note that only codes that have been previously defined in RESource can be entered here. If you are unable to enter a code you must exit the window and go to Maintenance – Admin Finance – ICD Codes and Add it.

- **Default Price** – the default price for the lab item

- **Max Units** – the maximum number of units that can be billed

3 – click OK