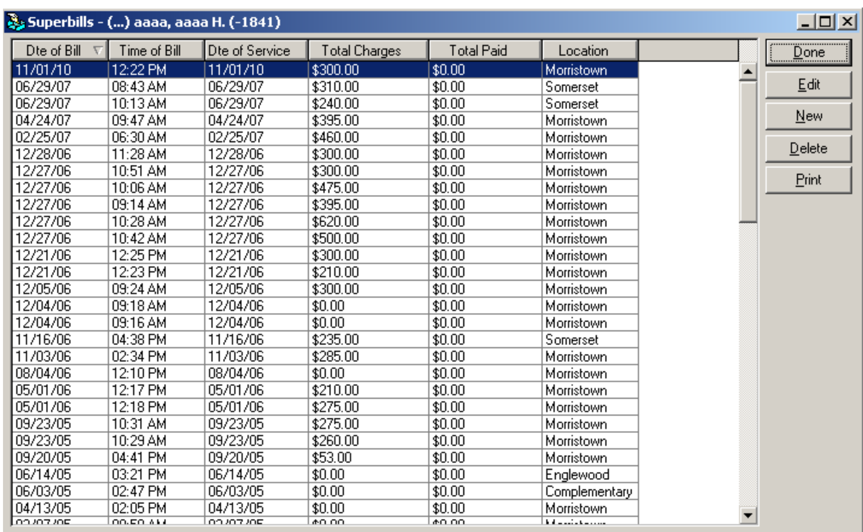
The purpose of a Super Bill is to generate a receipt of charges and collections for services rendered. Bills can be entered through the Patient menu or through the Sign In window.

To access an existing patient's superbill history, you must first search for the patient in the Patient Explorer. If more than one patient is listed from the search criteria, you need to select the desired patient, then go to the Patient option in the main menu and select Super Bill. The shortcut icon for **SuperBill** is . This shortcut can be found in both the Patient Explorer and the Sign in window. Click on this icon to see a patient's history of bills- a Superbills window will appear.

Note: When in Sign In, you can also access the Super Bill history from the Actions menu at the top of the window.



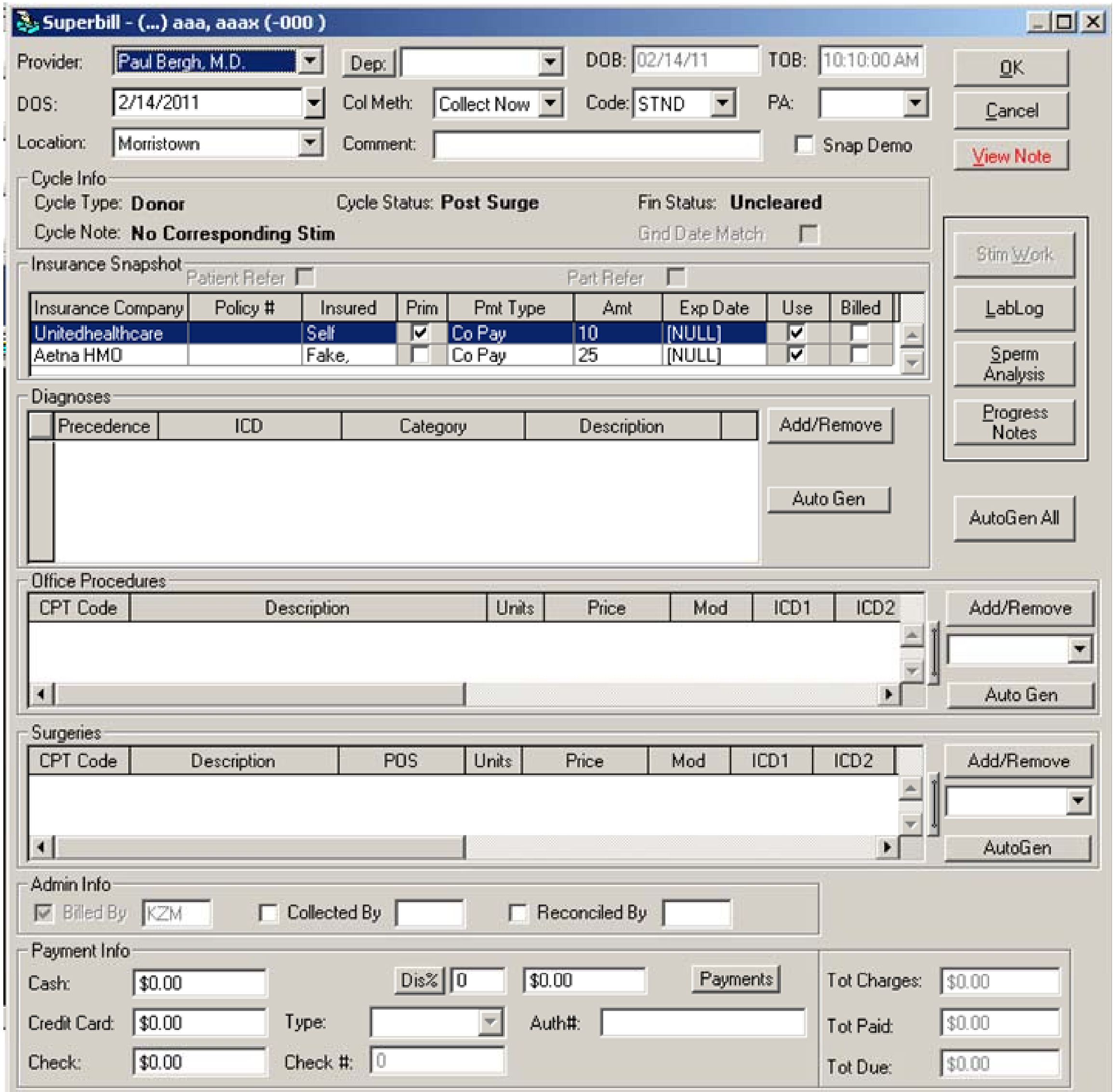
Dte of Bill	Time of Bill	Dte of Service	Total Charges	Total Paid	Location
11/01/10	12:22 PM	11/01/10	$300.00	$0.00	Morristown
06/29/07	08:43 AM	06/29/07	$310.00	$0.00	Somerset
06/29/07	10:13 AM	06/29/07	$240.00	$0.00	Somerset
04/24/07	09:47 AM	04/24/07	$395.00	$0.00	Morristown
02/25/07	06:30 AM	02/25/07	$460.00	$0.00	Morristown
12/28/06	11:28 AM	12/28/06	$300.00	$0.00	Morristown
12/27/06	10:51 AM	12/27/06	$300.00	$0.00	Morristown
12/27/06	10:06 AM	12/27/06	$475.00	$0.00	Morristown
12/27/06	09:14 AM	12/27/06	$395.00	$0.00	Morristown
12/27/06	10:28 AM	12/27/06	$620.00	$0.00	Morristown
12/27/06	10:42 AM	12/27/06	$500.00	$0.00	Morristown
12/21/06	12:25 PM	12/21/06	$300.00	$0.00	Morristown
12/21/06	12:23 PM	12/21/06	$210.00	$0.00	Morristown
12/05/06	09:24 AM	12/05/06	$300.00	$0.00	Morristown
12/04/06	09:18 AM	12/04/06	$0.00	$0.00	Morristown
12/04/06	09:16 AM	12/04/06	$0.00	$0.00	Morristown
11/16/06	04:38 PM	11/16/06	$235.00	$0.00	Somerset
11/03/06	02:34 PM	11/03/06	$285.00	$0.00	Morristown
08/04/06	12:10 PM	08/04/06	$0.00	$0.00	Morristown
05/01/06	12:17 PM	05/01/06	$210.00	$0.00	Morristown
05/01/06	12:18 PM	05/01/06	$275.00	$0.00	Morristown
09/23/05	10:31 AM	09/23/05	$275.00	$0.00	Morristown
09/23/05	10:29 AM	09/23/05	$260.00	$0.00	Morristown
09/20/05	04:41 PM	09/20/05	$53.00	$0.00	Morristown
06/14/05	03:21 PM	06/14/05	$0.00	$0.00	Englewood
06/03/05	02:47 PM	06/03/05	$0.00	$0.00	Complementary
04/13/05	02:05 PM	04/13/05	$0.00	$0.00	Morristown

From the history, you can add, delete, edit, or print superbills. The columns list the date and time the bill was created, date of service, the total charges, the total amount paid, and the location where services were performed.

Several REsource grids (tables) have the ability to change sort order and column width. To activate a sort, left mouse click on the column header you would like to sort on. Clicking the column header again will reverse the sort. The Super Bill Diagnosis can be sorted by any of its columns. A triangle arrow will appear next to the column header, indicating that the list is being sorted by that column – a downward facing arrow indicates descending order CPT Code ▽ and an upward facing arrow indicates ascending CPT Code △. Each column width can also be adjusted by moving the cursor over the rightmost side of the column, at the column heading – the cursor will change from a pointer to a cross. When the cursor becomes a cross, hold down a left mouse click and move

To create a new Superbill:

1 – click New. A new superbill window will appear. The Superbill window is broken up into several sections: Cycle Info, Insurance Snapshot, Diagnoses, Office Procedures, Surgeries, Admin Info, and Payment Info.



2 – enter the superbill (all fields described below) and click **OK** when done

The fields at top of the Superbill window are as follows:

- **Provider** - Name of the provider that performed the services being billed.
- **DOS** – Date of Service (date services rendered)
- **Location** - office location where services rendered

You may notice that selecting a different location can change the available provider options in the Provider drop down list. This optional feature is managed by an administrator.

- **Dep** – clicking this button will display a prompt asking you if you wish to bill to partner. By choosing Yes to the prompt, all partner options for the patient (any not marked as 'Not Active') will appear in the corresponding dropdown. Selecting a partner from this list allows the bill to be created for that dependent partner.
- **Col Meth** - collection method, such as Collect Now, Bill Later or No Charge
- **Comment** - comment field to make note of any important issues regarding this patients bill
- **DOB** - Date of Bill (date the bill was created)
- **Code** –
- **TOB** – Time of Bill
- **PA** - Physician Assistant
- **Snap Demo** – when checked, the demographics snapshot (that appears on the printed bill) will be updated, when printing a pre-existing bill (in the event there have been changes to the demographics since the time of the bill).

Cycle Info

This section gives the current Cycle Type and Cycle Status, along with a Cycle Note and Financial Status for the current cycle. This is useful information for coverage of insurance benefits pertaining to what stage and type of cycle the patient is currently in.

GND Date Match – this field will be highlighted yellow and the checkbox will be checked if the date of service matches the current cycle's Gnd date (in the stim sheet).

Cycle Info reflects information from the patient's ***current*** cycle. As a reminder, a patient's current cycle is the shaded cycle icon in the patient's chart (Patient Explorer).

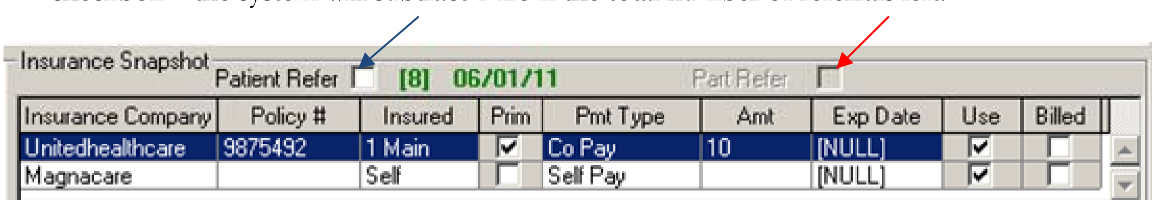
Insurance Snapshot

Insurance Snapshot — Patient Refer ☐ — Part Refer ☐ [19] 03/31/11

Insurance Company	Policy #	Insured	Prim	Pmt Type	Amt	Exp Date	Use	Billed
Gallagher Benefit	12345	Self	☑	Self Pay		[NULL]	☑	☐
Oxford Referral		Self	☐	Self Pay		[NULL]	☑	☐

This section gives a quick glance at insurance company, policy number, and who is insured as indicated in the patient's Patient Details (aka Demographics).

- **Prim** - indicates primary insurance
- **Pmt Type** - payment type, such as CoPay, Self Pay, or Bill Insurance
- **Amt** - amount to be collected at time of service
- **Exp Date** – expiration date of insurance policy
- **Use** – check off if the insurance policy is to be used for this Superbill. By default, any insurance companies appearing will have this checked.
- **Billed** – check off when these charges have been billed to the insurance company
- **Patient Refer** – patient referral (blue arrow below). If a referral has been entered for the patient, defined with a number of visits and/or an expiration date, it will be reflected to the right of this checkbox (see green text below). The remaining number of visits will appear in red text when <=5 or the expiration date is within 7 days. If the given superbill is to count against the referral, check off the Patient Refer checkbox – the system will subtract 1 from the total number of referrals left.



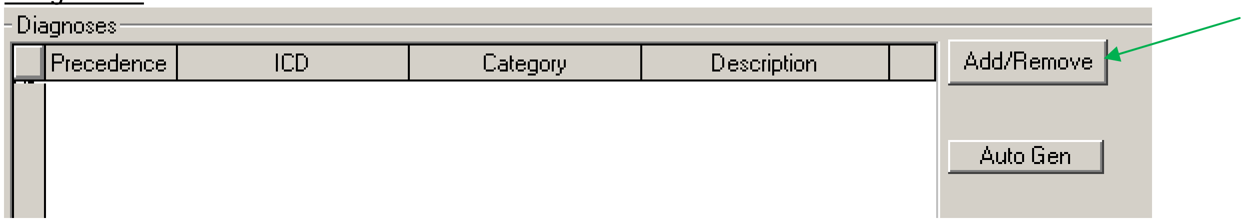
Insurance Snapshot — Patient Refer ☐ [8] 06/01/11 — Part Refer ☐

Insurance Company	Policy #	Insured	Prim	Pmt Type	Amt	Exp Date	Use	Billed
Unitedhealthcare	9875492	1 Main	☑	Co Pay	10	[NULL]	☑	☐
Magnacare		Self	☐	Self Pay		[NULL]	☑	☐

- **Partner Refer:** - partner referral (red arrow above). If a referral has been entered for the partner, defined with a number of visits and/or an expiration date, it will be reflected to the right of this checkbox. This checkbox works the same as the patient referral field.

> Referrals are entered in the insurance portion of the patient demographic in Patient Details. Please refer to the Finance section for information on how to enter a referral.

Diagnoses



This section displays diagnoses selected for this procedure on this date of service.

Column Definitions:

- **Precedence** – indicates the order of precedence for the ICD codes. The order can be changed by left clicking on the gray button, holding and dragging the record/row up or down.

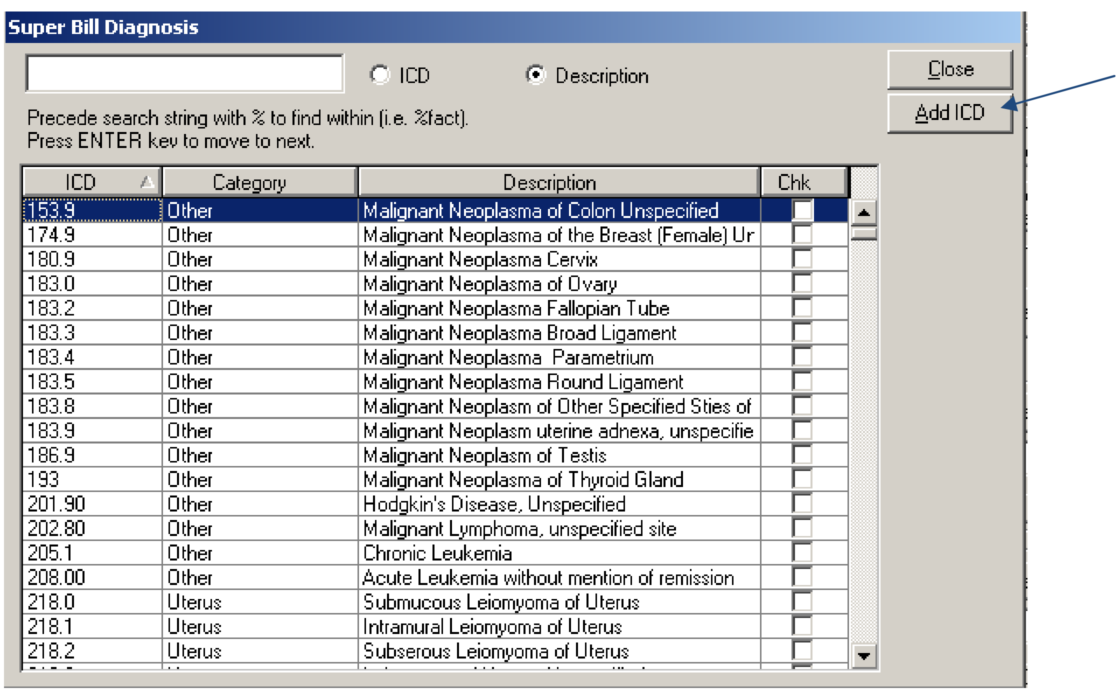
- **ICD** - Displays the ICD-9 code or diagnosis codes associated with this procedure.

- **Category** – diagnosis category, used to filter diagnosis selection

- **Description** – diagnosis name/description

To Add/Remove a diagnosis:

1 - Click **Add/Remove** button (green arrow above) and a Super Bill Diagnoses window appears



2 - Click the search option for **ICD** or **Description** at the top of the page to toggle between the type of search you want to execute. You can search for a particular diagnosis either by ICD-9 code or Description. As you type in the top left hand text box, a matching record will be highlighted. Click 'Enter' on your keyboard to execute the search and to continue to scroll through the records.

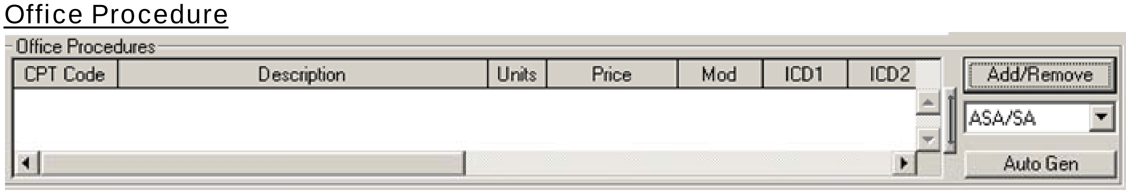
The **Add ICD** button (blue arrow above) is where additional ICD-9 codes can be found.

Note: You can also use the vertical scroll bar to scroll to the desired diagnosis without executing a search.

3 - Once you find the desired diagnosis, check off the corresponding **Chk** checkbox to select it. Multiple diagnoses can be chosen. You can remove selected diagnoses by unchecking the **Chk** checkbox.

4 - Click **Close** to return to Superbill window. The fields in the Diagnoses section will now be populated with what you have selected.

Office Procedure

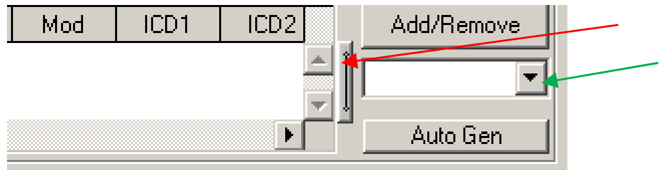


This section displays procedures performed at date of service.

Column Definitions:

- **CPT** – procedure code
- **Description** – procedure code description
- **Units** - For insurance billing purposes and to meet CPT coding requirements, some procedures require multiple Units on a super bill. The default setting for 'Units' is 1. Click on the procedure to highlight it and type the number of desired units. Once typed, you may also use the arrows to decrease or increase the unit number.
- **Price** - Cost of procedure performed.
- **Mod** - modifier. For insurance billing purposes and to meet CPT coding requirements, some procedures require a modifier. This is a 2 digit number that further explains details of procedure associated with the CPT code. Example is modifier -80 represents assistant at surgery by another physician.
- **ICD1 and ICD2** - These columns allow you to view one or more diagnoses that are linked to this procedure. The procedure must be a chargeable item in 'Lab Orders' on the date of the superbill. These fields are automatically populated when you hit the **Auto Gen** button. For more information, please refer to section **Auto Gen** later mentioned.

- **Expand** – clicking the expand button will expand the **Office Procedure** field for a larger view if there are several procedures listed. Click the icon again to minimize the area. This icon is available for **Office Procedures** as well as the **Surgeries** section.



To Add/Remove a procedure:

1 - Click **Add/Remove** and search for a CPT/procedure following the same steps as Diagnosis

OR

1 -under the Add/Remove button (green arrow above) is a dropdown list containing 'standard office procedures', commonly grouped procedures. Instead of clicking the Add/Remove button, you can select a grouped option and the system will apply the procedures. You can edit the procedures inserted into the Office Procedures section using the Add/Remove button.

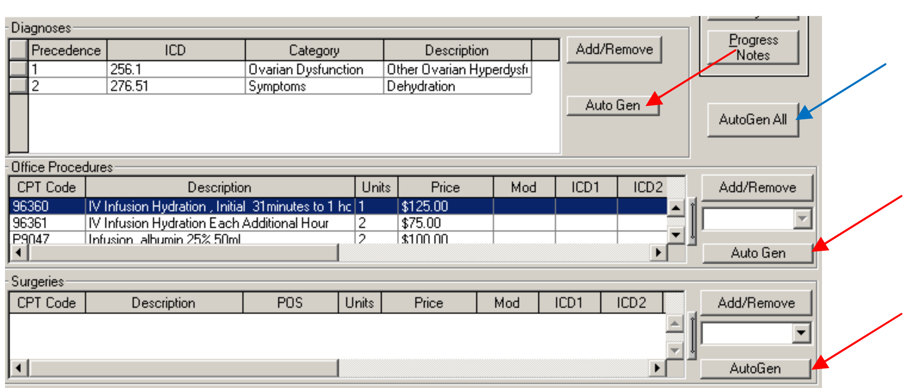
If you need a CPT or ICD code added, please see your RESource administrator.

Surgeries

This section displays surgical procedures performed at date of service. This section is set-up the same as Office Procedures. Continue the selection process as previously described in the Office Procedure section.

Auto Gen

Above, we described how to manually select items for Diagnoses, Office Procedures and Surgeries. Another option available for selection is using the **Auto Gen** (automatic generation) buttons (red arrows below).



- **Auto Gen in the Diagnosis Section**

  Clicking on this button in this section will automatically populate the section with ALL current cycle diagnoses as well as the lab order for the given date. Note that cycle diagnoses must be mapped to ICD codes in order for the Auto Gen feature to work – please see a RESource administrator for more details.

- **Auto Gen in the Office Procedures Section**

  Clicking on this button in this section will automatically populate the section with any procedure, including its Units, Price and ICD code, selected in a lab order for the given date. Note that all billable items must exist in the lab order in order for the Auto Gen feature to work completely.

- **Auto Gen in the Surgeries Sections**

  Clicking on this button in this section will automatically populate the section with any surgical procedure, including its Units, Price and ICD code, selected in a lab order for the given date. Note that all billable items must exist in the lab order in order for the Auto Gen feature to work completely.

AutoGen All
Clicking this button (blue arrow above) will auto populate ALL items for the Diagnoses, Office Procedures and Surgeries sections. This expedites the process of creating a superbill by populating the fields in these sections with one click.

Useful Links

The "useful links" buttons allow a user to quickly view information that may come up in the patients' office visit experience. The most common use for these links is to view information and details, but a user can also perform some editing if needed.

- **View Note**
  If highlighted red, a superbill note exists for the patient. A superbill note can be entered by a member of the finance permission group and may contain information regarding collecting payment, insurance coverage, etc.

SuperBill Notes are entered via the Patient menu. Look up the patient in Patient Explorer, then select Patient menu, Super Bill Note, New Note. You can also view a history of all superbill notes for the patient by following the same path and choosing Note History.

- **Stim Work**
  Clicking on this button will show lab orders entered in the Stim Sheet for the date entered in the superbill. This is helpful to view if a patient has questions on which services were performed or when selecting procedures to enter into the bill when creating it. If the icon is grayed out 

  , this means that no lab orders were entered through the Stim Sheet for this date. This link will only show lab orders directly entered into the Stim Sheet; you will not be able to view any labs ordered via the patient menu.

- **Lab Log**
  Click on this button to view the Lab Log, which is a history of patient lab testing performed and results. To exit out of window click Done.

- **Semen Analysis**
  Click on this button to view the Semen Analysis History window which displays all records of analyses performed and their results. To exit out of window click Done.

- **Progress Notes**
  Click on this button to view the Progress Note history which contains all notes entered in the patient's chart. From this link in the superbill, you can only view progress notes. You cannot add or delete progress notes. To exit out of this window click Cancel.

Admin Info

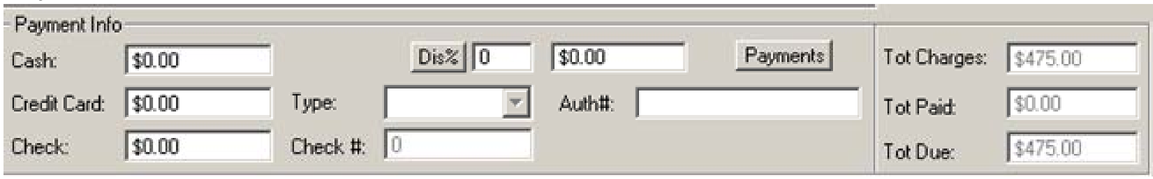
This section tracks the person who created, collected and reconciled the bill. Once the box is checked for these actions, it will populate with initials of the employee.

- **Billed By** - Automatically populates the user initials of the person who created the bill by clicking on **New** in the Superbills history window.

- **Collected By** - Can be used to track who collected payment on a particular superbill. Clicking on this box, will populate the field with the user's initials that currently has the bill open.

- **Reconciled By** - Can be used to track who reconciled a particular superbill. Clicking on this box, will populate the field with the user's initials that currently has the bill open. Once a bill is reconciled, it can no longer be edited. Only users in the Office Admin permission group can uncheck the Reconciled By checkbox.

Payment Info



Field Definitions:

- **Cash** – cash payment amount

- **Credit Card** – credit card payment amount

- **Type** - When a patient pays by credit card, you can use this drop-down to select which kind of credit card they used. Examples: Visa or MasterCard.

- **Auth #** - authorization number. This field can be used to enter the confirmed authorization number given when the payment was charged to the selected credit card.

- **Check** – check payment amount

- **Check #** - check number

- **Dis%** - percent discount. In this box, you can enter a percentage of the total bill or enter a dollar amount to be discounted. Clicking on the Dis% button will populate the field with a 10% discount by default. After entering, you will see the results of the selected discount reflected in the **Tot Charges** section.

- **Tot Charges** – total charge amount for services on this superbill

- **Tot Paid** - total amount paid by the patient for services on this superbill

- **Tot Due** - outstanding balance remaining on this superbill

- **Payments** - clicking on this will bring up a Payments window which allows you to track all running payments and balances on the bill.

From the Superbills (history) window, you can also edit existing bills, delete bills and print.

To Edit/Delete/Print a superbill, select the desired bill to highlight it, then click Edit**,** Delete or Print. If editing, the superbill will appear - make necessary changes and click OK**.** To delete a superbill you must be part of the Office Admin permission group. If you are not a member of this group you will get an “Insufficient Permissions” error upon clicking the Delete button. When printing, an image of the superbill printout will appear – select the printer and the number of copies to print.