

LEONARDOMD
online medicine

Professional and Office Editions

Billing Work Flow Manual



Patient → Appointment → Encounter or Superbill → Claim



Table of Contents

Billing Flow Concept	2
Begin Billing from Appointment	3
Begin Billing from Patient Flow View	4
Coding Encounters	5, 6
Coding Superbills	5, 6
Selecting ICD 9 & CPT Codes	5, 6
Modifying CPT codes (D.O.S., Modifiers, etc..)	7
Converting Encounters to Superbills	8
Creating Claims from Superbill	10
Working with the New Claims Dialog	11
Exceptions Report	10, 12
How to Save electronic claims	12, 13
How to submit claim to clearing house	13
Printing and editing CMS 1500 claims	14, 15
Batching (Mass claims or superbill production)	16
Working with a batch	17

Billing Flow Concept

The billing process begins when a new patient is registered. It is important that all of the patient information is entered correctly and completely. When claims are created they will pull needed information from the patient record.

To enter a patient go to the patient list view shown in figure 1, and click on the "New Patient" link.

Once your new patient is entered and saved into the system you will be able to see all of their information on the patient detail page shown in figure 2.

LEONARDOM^D RENAISSANCE[®] Professional Edition
John Smith, MD
Setup | Support | Sign Out | Help
Home | Office | Messages | Schedule | Registration | Charts | Billing | Reports
Tuesday, November 1, 2005

Patients
Search for...
Search in... Patients
Last Name
Search
Related Links:
Patients List
Facsheet Detail
Account Detail
New Patient
No Picture Available

#1222 John Smith

Patient Information
Active: Yes
Patient #: 1222
Full Name: John Alan Smith
Alias: None
SSN: 458-58-5458
Date of Birth: 8/14/2000
Age: 5 year(s) & 2 month(s)
Deceased Date: None
Medical Record #: None
Other #: None
Provider: Ralph Holmes, M.D.
Primary Physician: Leo Hio
Referring Physician: Leo Hio

Home Address: 123 First St
San Diego 92121
United States of America
Mailing Address
Business Address: 222
United States of America
Other Address: Favorite Place
333
United States of America

Home Phone: None
Business Phone: 858-450-6611
Mobile Phone: None
Fax: None
Other Phone: None
Email: None

Gender: Male
Race: None
Marital Status: Single
Student Status: Not a student
Employment Status: None
Employer: None
Occupation: None
Category: None
Birthplace: None
Citizenship: None
Primary Language: English
Religion: None
Release of Information: Yes
Signature Source: Signed authorization for block 12
Comments: None

Privacy Notice Status: None
Privacy Notice Dates: None

Account Summary
Patient Balance Insurance Balance Total
\$0.00 \$0.00 \$0.00

Message History (0) [New](#)
Problems (0) [Update](#) [New](#)
Associated Persons (2) [New](#)
Superbills (0) [New](#)
Insurance Coverages (1) [New](#)
Chart Documents (0) [Print/Save](#) [New](#)
Copays (0) [New](#)
Associated To (0)
Referrals (1) [New](#)
Appointments (0) [New](#)

©2001-2005 LeonardMD, Inc. All rights reserved. Terms of Use

(figure 2)

new patient link

LEONARDOM^D RENAISSANCE[®] Professional Edition
Home | Office | Messages | Schedule | Registration | Charts

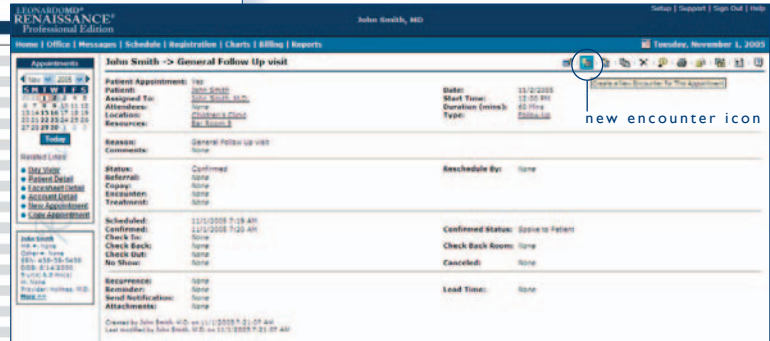
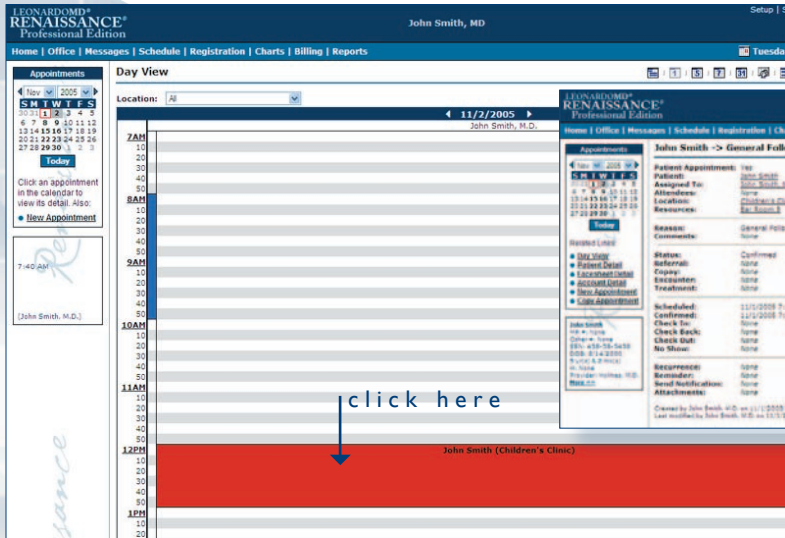
Patients
Search for...
Search in... Patients
Last Name
Search
Click a patient in the list to view its detail.
Also:
[New Patient](#)

All Patients
List View: * All Patients
All | A | B | C | D | E | F | G | H | I | J | K
Note: Inactive patients are displayed with

Patient #	Patient Name
1045	Adams, Scotty
1182	Aguilar, II, Dusty
1186	Aguilar, John
1175	Aguilar, Jose
1217	Aguilar, I, Shakira
1049	Aguilera, Christina

(figure 1)

(figure 3)



(figure 4)

For most practices patients are required to schedule an appointment before they can be seen by the provider. Therefore the appointment is the start of the billing process.

NOTE: See cover page for billing flow outline.

To Begin the billing process:

- Click on the appointment (figure 3) to pull up the appointment detail page. (figure 4).
- Click on the "Create New Encounter From Appointment" icon shown in figure 4.

NOTE: By clicking on the "Create New Encounter From Appointment" icon, a new encounter will be created that will automatically inherit all of the pertinent patient information from the appointment.

Recommended Method

- Encounters can also be created from the Patient Flow View. They can be created either one at a time or in bulk. (see page 4)

Office Edition NOTE:

The office Edition does not have the Encounter Module. In this manual treat encounters as Superbills for the office Edition of Renaissance®.

Creating Encounters or Superbills From The Patient Flow View (Recommended Method) See Note Below for Office Edition

The patient flow view can be found in the Schedule section under Appointments. This view allows users to keep track of current appointments and daily patient flow by listing appointments based on their statuses. Users are able to create encounters for appointments listed with one click.

Office Edition

Since the chart module does not exist in the office edition you will be able to create superbills directly from the patient flow view.

NOTE: Claims can only be created from superbills. Therefore users may skip encounters and go directly to superbills if desired.

LEONARDOMD® RENAISSANCE® Professional Edition

John Smith, MD

Setup | Support | Sign Out | Help

Thursday, November 3, 2005

Home | Office | Messages | Schedule | Registration | Charts | Billing | Reports

Patient Flow View

Location: All

Date: 11/2/2005 Last Refresh Time: 9:02:22 AM on 11/2/2005

Note: Canceled appointments are displayed with a strikethrough and no show appointments in red.

Create Encounters Icon

Status	Start Time	Wait	Patient	Reason	Location	Type	Assigned To	Attendees	Resources	Referral	Co-pay	Encounter/ Treatment
Scheduled (1)												
Change 1:00 PM	1:00 PM	N/A	Good	Visit	Children's Clinic	Follow up	John Smith, M.D.	Clare Barton, R.N.	Bar Room 5	Select Referral	\$20.00	New Encounter
Confirmed (1)												
Change 11:00 AM	11:00 AM	N/A	John Smith	General	Children's Clinic	Follow up	John Smith, M.D.		Bar Room 5	Select Referral	\$20.00	Encounter: John Smith vs 11/2/2005 General Follow up visit
Check In (0)												
Check Back (0)												
Check Out (1)												
Change 1:00 PM	1:00 PM	N/A	Good	Visit	Children's Clinic	Follow up	John Smith, M.D.	Michael Aguilar	Bar Room 5	Select Referral	\$20.00	New Encounter
No Show (0)												
Canceled (0)												

(figure 5)

FlowView Encounter Creation Process

- To create one encounter at a time click on the "New Encounter" link.
- To create multiple encounters for all appointments in the view click on the "Create Encounters for All Appointments in the View" icon.
(see figure 5 for illustration)

NOTE: By clicking on the "Create New Encounter From Appointment" link, a new encounter will be created that will automatically inherit all of the pertinent patient information from the appointment. (See page 5 for coding information)

Coding Encounters or Superbills

(figure 6)

An encounter is an electronic record that captures information from the appointment and allows the physician or biller to add ICD-9 and CPT codes. (figures 6 & 7)

As a result of completing the encounter a superbill can be generated that will inherit all of the pertinent information from the encounter. That superbill can then be turned into a claim and sent out either by paper or via electronic claim submission.

NOTE: If the edit screen for the encounter is not already loaded you will need to go to the "Encounter detail page" and click on the edit icon in upper right icon tool bar.

NOTE: Figures 6 & 7 represent one encounter. Figure 7 shows the bottom of the encounter form where physicians or billers can add ICD-9 and CPT codes. (see pages 6 & 7 for more information on how to code and encounter)

The screenshot displays the 'New Encounter' form in the LEONARDOMD Professional Edition software. The form is divided into several sections: Patient information, Encounter details, Insurance, Location, and a section for adding diagnoses and procedures. A red circle highlights the 'Add diagnoses to problems on save' section, with a callout stating 'coding will be done here'. The form also includes a table for 'Diagnoses' and 'Procedures' with columns for ICD-9, CPT, and Modifier codes. The bottom of the form shows a 'Total Charge' of \$1.00 and a 'Save' button.

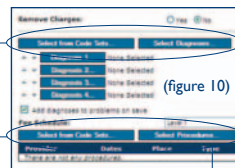
(figure 7)

How to select

ICD-9 & CPT codes

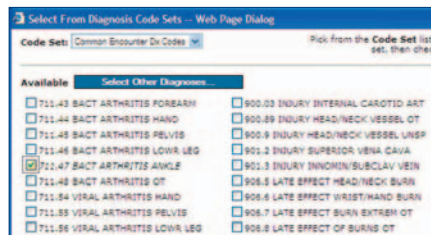
- Hit the "Select from Code Sets..."(figure 10) or "Select Diagnosis / Procedures"(figure 10) buttons.
- Figures 8 & 9 illustrate the web page dialog that will appear that will allow you to search for your code by number or by name.

Select ICD-9 from Code Set or from Diagnosis List.



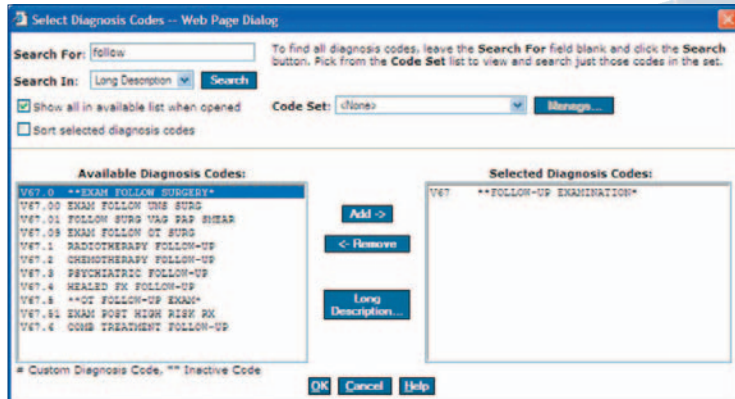
Select CPT code from Code Set or from Procedure List.

See your practice setup guide on how to set up code sets. (see figure 11)

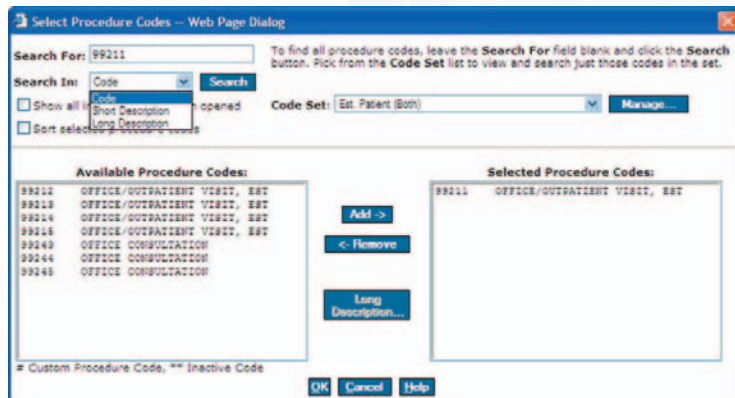


(figure 11)

(figure 8)



(figure 9)



How to edit / copy procedures

- To edit the procedure click anywhere on the procedure. (figure 12)
- To copy a procedure click on the "copy procedure" icon to the left of the procedure. (figure 12)

Add ICD-9 codes to problems list on save.

This button allows users to diagnose using problems list.

(figure 12)

Select from Code Sets... Select Diagnoses... Select Active Problems... Apply to Procedures...

Diagnosis 1... 711.47 BACT ARTHRITIS ANKLE
Diagnosis 2... None Selected
Diagnosis 3... None Selected
Diagnosis 4... None Selected

☒ Add diagnoses to problems on save

Fee Schedule: Level 1

Select Fee Schedule Here

Click on procedure to edit.

Modifier Schedule: Standard

Select from Code Sets... Select Procedures... New Procedure

Provider	Dates	Place	Type	Code	Modifier Codes	Diagnosis #	Charges	Units
John Smith, M.D.	11/9/2005 - 11/9/2005	22	1	99214		1	\$252.24	1

OFFICE/OUTPATIENT VISIT, EST

Total Charge: \$252.24

Copy Procedure Icon

Created by John Smith, M.D. on 11/4/2005 6:52:31 AM
Last modified by John Smith, M.D. on 11/8/2005 1:19:49 PM

Save Save and New

Additional information about Editing a procedure.

- When you click on a procedure to edit it a pop-up window appears above the current page you are working in (figure 13).
- In the pop-up Edit Procedure Information window you will be able to accomplish tasks such as:
 - Tack on modifiers to codes.
 - Specify override values for charge.
 - Assign EPST, COB, etc....
 - Mark charge as Patient Responsibility.
 - Add different dates of service to CPT code.

Procedure Information -- Web Page Dialog

Edit Procedure Information

* and colored fields are required

*Provider: Smith, M.D., John

Procedure Code... 99201 OFFICE/OUTPATIENT VISIT, NEW

Place of Service: Outpatient Hospital (22)

Type of Service: Medical Care (1)

Diagnosis Codes: ☒ 1 - V67 ☐ 2 - ☐ 3 - ☐ 4 -

*Start Date of Service: 11/2/2005
*End Date of Service: 11/2/2005

Schedule Fee: 100

Modifier 1:

Modifier Value 1:

Modifier Amount 1:

Modifier 2:

Modifier Value 2:

(figure 13)

Creating a Superbill from Encounter

- Once you have coded and saved the Encounter as described in pages 6 and 7 you will be taken to the Encounter Detail Page shown in figure 14. From the detail page click on the "New" button on the Superbill information box (figure 14) to create a superbill for the current Encounter.

NOTE: The Superbill information box on the Encounter may not be in the same position as shown in figure 14. If you would like to arrange your Encounter detail as shown in figure 14 go to your personalization settings for Encounters.

Encounter or Superbill Batches

- A batch is a group of related items that can have similar actions performed to them at the same time. Superbill Batches are used for mass superbill and claims production. It is recommended that you read through how to create superbills and claims on individual a basis before you learn how to create superbills and claims using batches. For more information about batches see page (16).

The screenshot shows the LEONARDOMD RENAISSANCE Professional Edition software interface. The top navigation bar includes links for Home, Office, Messages, Schedule, Registration, Charts, Billing, and Reports. The user is logged in as John Smith, MD. The main content area displays the Encounter Detail page for a patient named John Smith, MD, with encounter number 1372. The page is titled "John Smith -> #1372 General Follow Up visit".

On the left side, there is a sidebar with a search bar and a list of related links: Encounter List, Patient Detail, Encounters Detail, Account Detail, Item Encounters, and Copy Encounters. Below this is a section for "John Smith" with contact information.

The main content area is divided into several sections:

- Superbills (1)**: A table showing one superbill entry with columns for Superbill #, Status, Start of Service, End of Service, Location, and a "New" button.
- Encounter Information**: A form containing patient details (Name, Status, Start Time, Description, Provider, Referral), insurance information (Primary, Secondary, Tertiary), and other details (Comments, Category, Location, Appointment).
- Defaults for Procedures**: A form containing information about the place of service, procedure codes (CPT, ICD-9, ICD-10), and other details.
- Diagnosis Codes**: A table showing one diagnosis code entry with columns for Description, Date, Place, Type, Code, Modifier Code, Diagnosis #, Charge, and Units.
- Remove Charges**: A section for removing charges.
- Encounter Notes (0)**: A section for adding notes to the encounter.
- Encounter Batches (0)**: A section for adding batches to the encounter.

A red circle highlights the "New" button in the Superbills section. A text box on the right side of the image says "Click New to create a Superbill".

New Superbill -- Web Page Dialog

New Superbill

* and colored fields are required

*Status: Preliminary

*Patient: John Smith

*Provider: Smith, M.D., John

Referring Physician... Leo MD

Primary Insurance: AETNA -> Managed Care - Primary

Primary Auth. #:

Secondary Insurance:

Secondary Auth. #:

Tertiary Insurance:

Tertiary Auth. #:

*Location: Children's Clinic

Copy: None Selected

Include Copay: ☒ Yes ☐ No

Copay Due: 20

Defaults for New Procedures

Apply to Existing Procedures

Place of Service: Outpatient Hospital (22)

Type of Service: Medical Care (1)

Start Date of Service: 11/2/2005

End Date of Service: 11/2/2005

Aging Date: 11/2/2005

Save Icon

(figure 15)

Office Edition NOTE:

If you are using the office edition you may skip to page 10, after reading only the "Useful Information on this page.

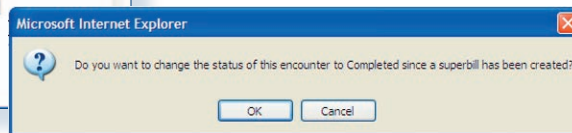
Quick Superbill Edit Window

When the "New" button from the Encounter Detail page is pushed a Quick Edit window will launch showing a preview of the Superbill that will be created (figure 15).

From here users can make changes if needed.

- Click the "Save" button or icon to create the new Superbill.

Once the new Superbill is created a prompt will appear that allows the user to change the status of the Encounter from preliminary to completed (figure 16).



(figure 16)

Useful Information: LeonardoMD Renaissance® uses different statuses to keep track of records. Later in this manual you will learn about batching records together for mass Superbill and Claims production. Using different statuses will allow users to run list that will pull up records by their status for further mass processing.

Creating Claims From Superbill

- From the Superbill Detail page find the Claims section and click the “New” button shown in figure 17.
- Once the “New” button is pressed from the Claims section on the Superbill Detail page a New Claims Dialog pop-up window will appear (figures 18 or 19). Users will then be able to select which type of claim to create (electronic 837 professional shown in figure 18 or CMS-1500 paper claim shown in figure 19).

See page 11 for New Claims Dialog pop-up window instructions.

LEONARDOMD® RENAISSANCE® Professional Edition

John Smith, MD

Home | Office | Messages | Schedule | Registration | Charts | Billing | Reports

Tuesday, November 1, 2005

Superbills

Search for: []

Search in: [Superbill]

Patient Name: []

Search

Related Links

- Superbill List
- Patient Detail
- Facility Detail
- Account Detail
- Take Schedule

John Smith, MD #1458

Location: []

Defaults for New Procedures

Admission: []

Type of Service: [Medical Care (1)]

End Date of Service: [11/2/2005]

Emergency: [No]

Copy Exempt: [No]

Diagnosis Codes: []

Fee Schedule: []

Modifier Schedule: [Standard]

Place of Service: [Outpatient Hospital (52)]

Start Date of Service: [11/2/2005]

Aging Date: [11/2/2005]

Family Planning: [No]

COB: [No]

Provider	Dates	Place	Type	Code	Modifier Codes	Diagnosis #	Charges	Units
John Smith, MD	11/2/2005 - 11/2/2005	52	1	94271		1	\$100.00	1
Total Charge: \$100.00 Amount Paid: \$0.00 Adjustments: \$0.00 Balance Due: \$100.00								

Local Use (Block 10): []

Block 10 Crosswalk to 837: []

Employment Related: [No]

Auto Accident State: [No]

Another Party Responsible: [No]

Current Type: [None]

First Date: [None]

Unable to Work To: [None]

Rehospitalized To: [None]

Pregnant: [No]

Outside Lab Charges: [None]

Comments: [None]

Local Use (Block 19): []

Pole Information (K23): [None]

Auto Accident: [No]

Other Accident: [No]

Accident Date: [None]

Date of Current: [None]

Unable to Work From: [None]

Hospitalized From: [None]

Weight: [None]

Outside Lab: [No]

Created by John Smith, MD on 11/1/2005 7:27:40 AM
Last modified by John Smith, MD on 11/1/2005 7:40:08 AM

Superbill Batches (0) [Message]

Superbill Notes (0) [New]

Account Ledger (0) [New Entered/Adjusted]

There are no transactions associated with this superbill.

Applied Patient Balance	Applied Insurance Balance	Total Payments	Total Charges	Total Balance Due
\$0.00	\$100.00	\$0.00	\$100.00	\$100.00

Claims (0) [New]

There are no claims for this superbill.

(figure 17)

Exceptions Report

When electronic 837 professional claims are created in LeonardoMD Renaissance® they are put through a format check called an Exceptions Report. This report only checks to verify that all of the information is in the proper 837 professional format. Claims are not guaranteed to be accepted by insurance companies based on the results of this report.

New Claims Button

(figure 18)

Electronic 837 Professional

New Claim - Web Page Dialog

Claim Type: ☐ CMS-1500 ☒ 837 Professional 1)

☒ Change status of superbill to Claimed 2)

Receiver: Navicare 3)

Submit to Insurance: ☒ Primary ☐ Secondary ☐ Tertiary 4)

☐ Only check for exceptions 5)

☐ Automatically send claim file to receiver

Superbill	Primary Insurance	Secondary Insurance	Tertiary Insurance
John Smith -> #1458 (Preliminary)	AETNA (None)		

Provider	Dates	Procedure	Charges	Primary Balance	Secondary Balance	Tertiary Balance
<input checked="" type="checkbox"/> John Smith, M.D.	11/2/2005 - 11/2/2005	99201	\$100.00	\$100.00	\$0.00	\$0.00

Total charge for the selected procedures = \$100.00

OK Add Comments... Cancel Help

Note: Procedures that have a \$0.00 balance due for the selected insurance priority are displayed in red ~~italics~~; Procedures that are the patient's responsibility are displayed with a strikethrough.

- 1) Select "837 Professional" for electronic claims.
- 2) Check box to change status of Superbill to claimed.
- 3) Select "Receiver". NOTE: Your receiver may be different than shown above.
- 4) Select which insurance to submit claim.
- 5) If you would like to only check for exceptions check box, otherwise an exceptions report (see page 10) will automatically run and claim will be created.
- 6) Select procedure(s) to claim and click "OK" to create your claim (see page 12 for further instructions).

(figure 19)

CMS-1500 Paper Claim

New Claim - Web Page Dialog

Claim Type: ☒ CMS-1500 ☐ 837 Professional 1)

☒ Change status of superbill to Claimed 2)

Type(s) of CMS-1500 Claims to Create: ☒ Primary ☐ Secondary ☐ Tertiary 3)

☐ Convert all values to uppercase 4)

Superbill	Primary Insurance	Secondary Insurance	Tertiary Insurance
John Smith -> #1458 (Claimed)	AETNA (Submitted)		

Provider	Dates	Procedure	Charges	Primary Balance	Secondary Balance	Tertiary Balance
<input checked="" type="checkbox"/> John Smith, M.D.	11/2/2005 - 11/2/2005	99201	\$100.00	\$100.00	\$0.00	\$0.00

Total charge for the selected procedures = \$100.00

OK Add Comments... Cancel Help

Note: Procedures that have a \$0.00 balance due for the selected insurance priority are displayed in red ~~italics~~; Procedures that are the patient's responsibility are displayed with a strikethrough.

- 1) Select CMS-1500 to create a paper claim.
- 2) Check box to change status of Superbill to claimed.
- 3) Select which insurance to submit claim.
- 4) Check box to convert all values to uppercase.
- 5) Select procedure(s) and click "OK" to create claim.

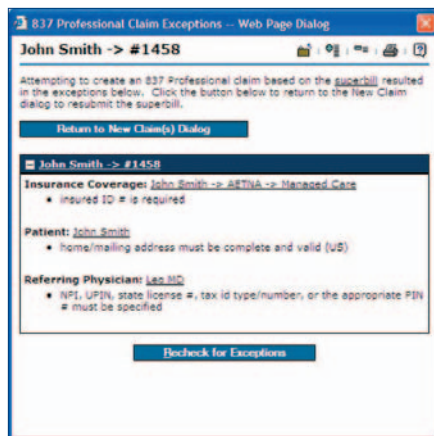
CMS-1500 Claims

- Once claim is created figure 21 will be displayed and user will be redirected back to the Superbill Detail Page.

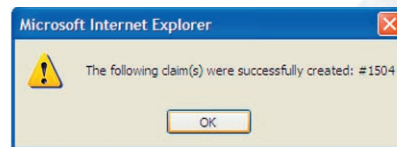
Electronic Claims

- When electronic 837 professional claims are created LeonardoMD Renaissance® automatically runs an exceptions report on them. If exceptions are found a pop-up window will appear displaying items on the claim that are not in the correct alpha or numeric format according to the 837 professional standards (figure 20). The claims exception window allows you to click on the links provided to fix the exceptions. The window will stay on top of your screen while you work. After each exception is fixed click the “Recheck for Exceptions” button.

(figure 20)



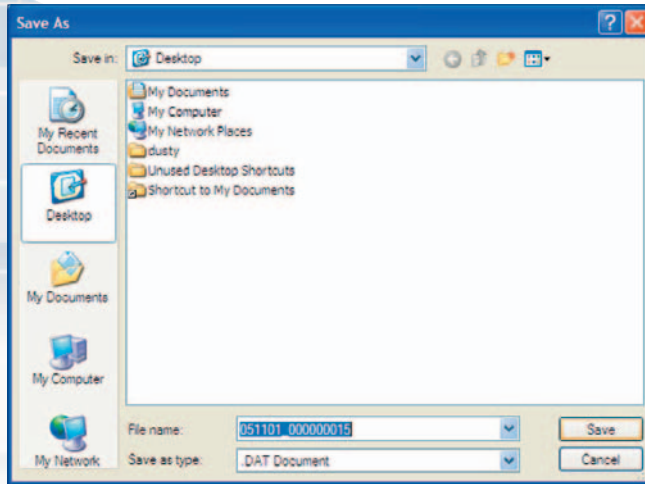
(figure 21)



Click Save to
export Electronic
Claim file to local
computer

(figure 22)

Once all of the exceptions are fixed the claim will be created (figure 21) and you will be prompted to save the claim file (figure 22). Saving the file will create a “.dat” file that can be uploaded to your selected clearing house for claims processing (see figure 23).

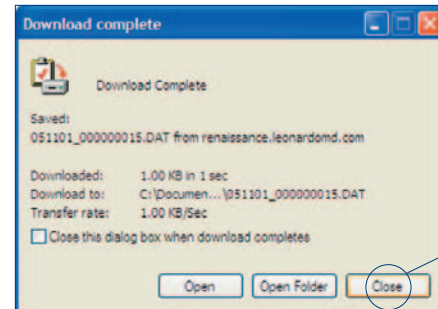


(figure 23)

- Save the electronic claim file to your desktop. It is recommended that you created a folder on your desktop using the name of your clearing house. For example:
 - ENS claims
 - Navicure claims

Once you have saved the claim file to a folder on your desktop you will be able to upload it to your clearing house following the upload methods that they have provided you with.

(figure 24)



- After you have saved your claim to your desktop you will receive another prompt. Click “Close” to continue working (figure 24).
NOTE: Consult with LeonardoMD on how to upload to clearing house if you have questions.

Printing CMS-1500

- Click anywhere on the claim link provided on the Superbill Detail page. (figure 25)

(figure 25)



Claim #	Type	Status	Payer Responsibility	Total Charge	Amount Paid	Balance Due
1504	207 Professional	Submitted	Primary	\$100.00	\$0.00	\$100.00

Claim Link from Superbill Detail Page.

- Click the printer icon from the Claim Detail page (figure 26). This will launch CMS-1500 form printer options seen on page 15 figure 26.

(figure 26)



LEONARDOMD
RENAISSANCE[®]
Professional Edition

John Smith, MD

Home | Office | Messages | Schedule | Registration | Charts | Billing | Reports

John Smith -> #1505 CMS-1500

Print CMS-1500 Icon

Edit CMS-1500 Icon

CMS-1500 Form

Date Format: Use default (2 digit)

Form Header: adthua Managed Care CA

1. Insurance Type: 07405
2. Patient's Birth Date: 01/10/2000
3. Patient's Address (Street): 123 First St
4. Patient's City: CA
5. Patient's Telephone: none
6. Patient's Status (Marital): Single
7. Insured's S.D. Number: 0123456
8. Insured's Address (Street): 34567
9. Insured's City: none
10. Insured's Telephone: none
11. Insured's Group Number: none
12. Insured's Date of Birth: none
13. Insured's Employer Name: none
14. Is There Another Health Benefit Plan? no

2. Patient's Name: Smith John A.
3. Patient's Sex: M
4. Patient's City: San Diego
5. Patient's Zip Code: 92101
6. Patient's Relationship to Insured: Self
7. Patient's Status (Employment): None
8. Insured's Name: Smith John A.
9. Insured's City: none
10. Insured's Zip Code: none
11. Insured's Group Number: none
12. Insured's Date of Birth: none
13. Insurance Plan Name: adthua Managed Care

Editing CMS-1500 Form

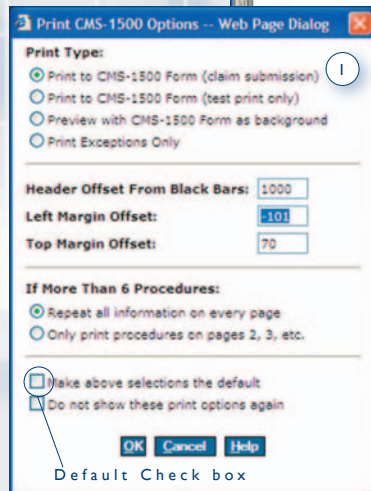
- Click on the edit icon from the Claim Detail page to access the Claim Edit page. NOTE: Changes to the Claim Edit page will only affect the claim, they will not update on the superbill. You can also update claims by editing the Superbill first then re-creating the claim.

The Claim is a snapshot of what the Superbill looked like at the instance the claim was created. Changes made to the Superbill will not automatically update any Claims already created.

(figure 28)



(figure 27)

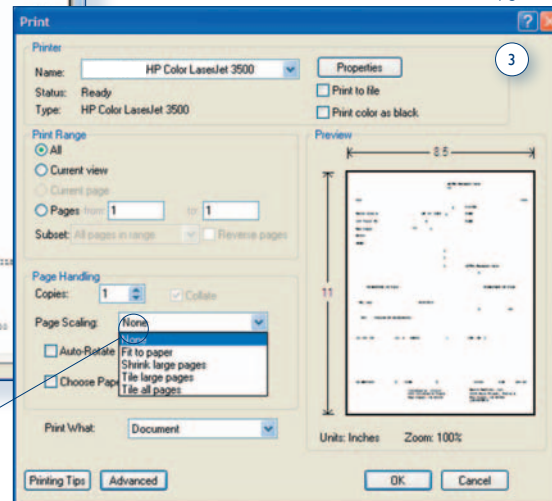


CMS-1500 Printer Settings

Settings shown in figure 27 allow users to format margins so claim information shown in figure 28 will align correctly on the CMS-1500 form. Check the "make above selection the default" once settings are correct. NOTE: Margins settings are measured in TWIPS. 720 = .5 in. You may also use negative numbers.

1. Set Print Margins
2. CMS-1500 Preview
3. Final Print Settings

(figure 29)



Final CMS-1500 Printer Setting

Adobe Acrobat / Reader has a setting called "Page Scaling" or "Shrink Large Pages" (figure 29). These settings must be set to "None" or must be unchecked. Once these settings are turned off they will save for next printing. Click Print to finish.

Batching

LeonardoMD provides a batching feature that makes mass submission of claims possible. To create a batch you must generate a list of records that will be added to your batch. You can generate a list of records using the "List View" feature provide in each module. i.e. Encounters, Superbills, or Treatments. **NOTE:** You may not have the Encounter or Treatment modules depending on which version of LeonardoMD Renaissance ® your office is currently using.

Creating List Views to Prepare for Batching

A list view is a query of the master list for the module that you are working in. You will notice a list called "All Superbills" or "All Encounters" depending on which module you are in. Creating a new List View will allow you to sort the master "All Record" view, generating a completely new list based on the information in the master list for that section.

To create a list view:

- Click on the "Copy List View" or "Create New List View link" (see figure 30).
- Follow the on screen instructions for steps 1-4.
- Step 5 is where you will need to determine how you want to sort the master list for that section. i.e. You can tell the system to only bring back superbills that are in the preliminary status, have a start date of service after a certain date and that do not have claims created yet. The query in step five would be:
 - Status: Is Equal To: Preliminary
 - State Date of Service: Is After: "Select a date from the calendar"
 - Primary Claim Status: Isn't Blank: In this case there is no value field, since the comparison takes care of the value.
- Click "Save" when you have finished with your list.

All Encounters

List View: *All Encounters Edit Copy List View Create New List View

Page 1 of 38

Patient Name	Encounter #	Status	Encounter Date	Description	Provider	Start Time	Appointment
Armstrong, Lance	1383	Preliminary	11/15/2005	Cast	Smith, M.D., John	4:30 PM	11/15/2005 4:30 PM

Copy List View Link

(figure 30)

Adding List to Batch and Working the Batch

Once you have generated the list of what you need to batch you will be able to click on the “Add List to Current Batch” icon to generate your batch.

NOTE: For the professional version of LeonardoMD Renaissance ® there are two times you will batch. 1.) You can batch a list of Encounters or Treatments to turn into superbills. 2.) You can then run a list to pull those superbills that were just created and batch them together to create claims. If you have the Office edition of LeonardoMD Renaissance ® you will only be batching from the superbill section.

When batching:

- To create a batch from the current list click on the “Add List to Batch icon”(see figure 31).
- A pop up window will appear that will allow you to add your list to a batch that already exist or you can create a new batch.
- You will also be able to change the status of each record in the list. When you run the list view again to see what needs to be batched you will not pull up records that have already been batched based on their status being different now.
- Click “OK” or “Save” once your batch has been created.
- To access your batch hover over the module that you are working in and find the “Batch” Section. Click on that link.
- Select that batch that you want to work with out of the list and click on it to begin.
- From the Batch Detail page you will notice “Listed Superbills” or “Listed Encounters or Treatments”, then you will notice buttons to the right that allow you to either create superbills or claims depending on what kind of batch you are working with. Select the appropriate button to mass produce either superbills or claims.
- For more help on how to produce electronic or paper claims see pages 10-15 of this document. NOTE: After creating CMS-1500 claims you will need to hit the “Print CMS 1500” button to print.

All Encounters

Add list to Batch

List View: * All Encounters Edit | Copy List View | Create New List View

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z

Page 1 of 38

Patient Name	Encounter #	Status	Encounter Date	Description	Provider	Start Time	Appointment
Armstrong, Lance	1383	Preliminary	11/15/2005	Cast	Smith, M.D., John	4:30 PM	11/15/2005 4:30 PM

(figure 31)