

Using the Patient Charge Status Tab

The **Patient Charge Status** tab allows you to review and manage patient charges.

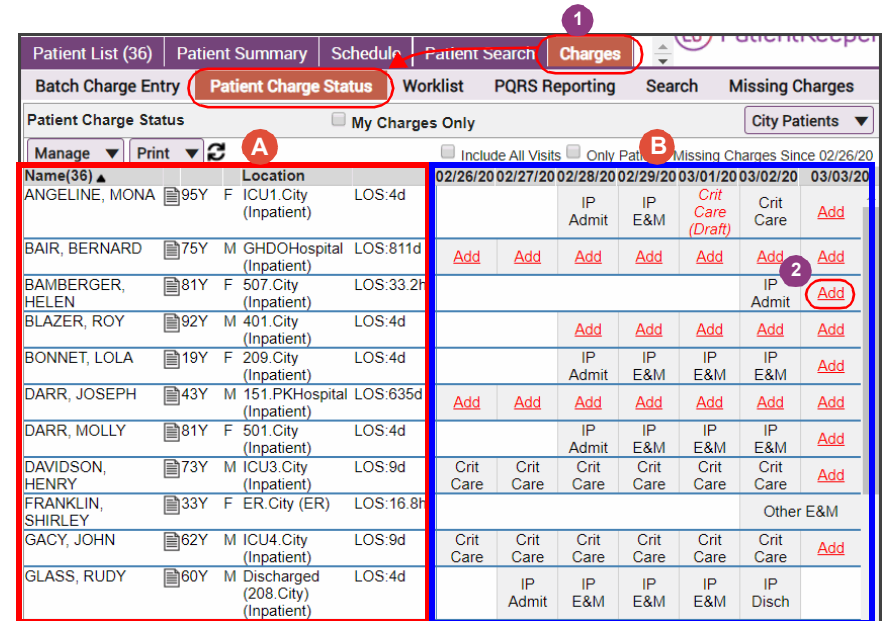
1 Click the **Charges** tab, and then the **Patient Charge Status** tab.

A The left side of the **Patient Charge Status** tab (highlighted in red) contains a list of patient names along with demographic and visit or hospital stay information.

B The right side of the tab (highlighted in blue) displays a table cell for each visit day that the patient has been at your healthcare organization. Each cell indicates the charge status for that day: a category name (like "IP E&M") indicates a charge of that type was entered, an [Add](#) link indicates that no charges were entered.

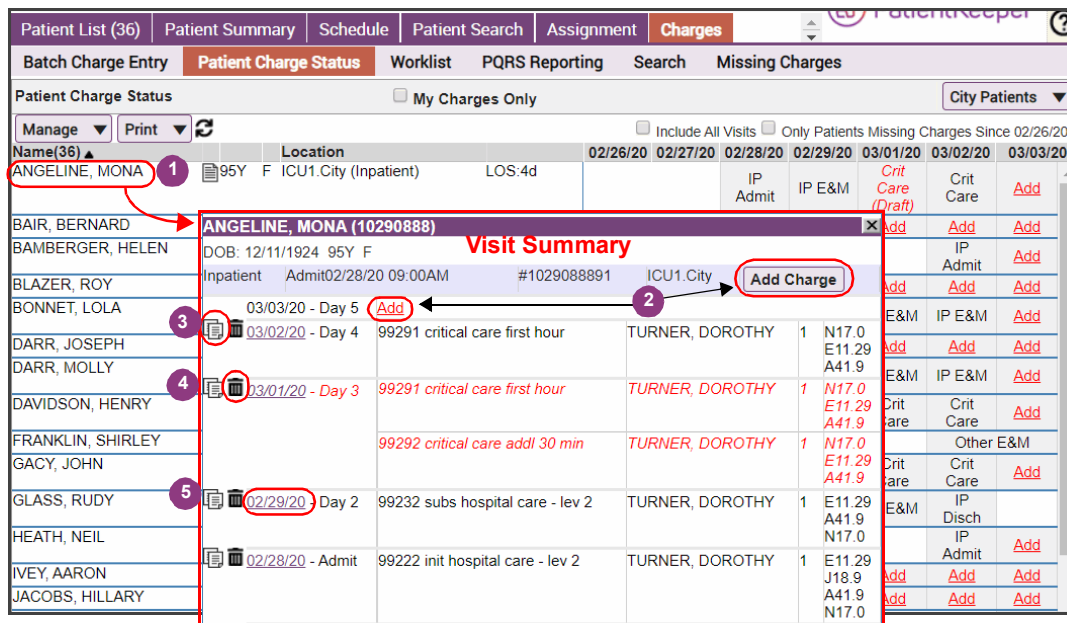
2 To add a charge for a visit day, click [Add](#). The **Charge Transaction** screen opens.

Tip: You can also add charges from the **Patient List**, **Worklist**, and **Schedule** tabs.



Name(36)	Location	02/26/20	02/27/20	02/28/20	02/29/20	03/01/20	03/02/20	03/03/20
ANGELINE, MONA	95Y F ICU1.City (Inpatient)	IP Admit	IP E&M	Crit Care (Draft)	Crit Care	Add		
BAIR, BERNARD	75Y M GHDOHospital (Inpatient)	Add	Add	Add	Add	Add	Add	Add
BAMBERGER, HELEN	81Y F 507.City (Inpatient)					IP Admit	Add	
BLAZER, ROY	92Y M 401.City (Inpatient)			Add	Add	Add	Add	Add
BONNET, LOLA	19Y F 209.City (Inpatient)			IP Admit	IP E&M	IP E&M	IP E&M	Add
DARR, JOSEPH	43Y M 151.PKHospital (Inpatient)	Add	Add	Add	Add	Add	Add	Add
DARR, MOLLY	81Y F 501.City (Inpatient)			IP Admit	IP E&M	IP E&M	IP E&M	Add
DAVIDSON, HENRY	73Y M ICU3.City (Inpatient)	Crit Care	Crit Care	Crit Care	Crit Care	Crit Care	Crit Care	Add
FRANKLIN, SHIRLEY	33Y F ER.City (ER)						Other E&M	
GACY, JOHN	62Y M ICU4.City (Inpatient)	Crit Care	Crit Care	Crit Care	Crit Care	Crit Care	Crit Care	Add
GLASS, RUDY	60Y M Discharged (208.City) (Inpatient)		IP Admit	IP E&M	IP E&M	IP E&M	IP Disch	

Copying, Editing, and Deleting Charges for a Patient's Visit



Name(36)	Location	02/26/20	02/27/20	02/28/20	02/29/20	03/01/20	03/02/20	03/03/20
ANGELINE, MONA	95Y F ICU1.City (Inpatient)	IP Admit	IP E&M	Crit Care (Draft)	Crit Care	Add		
BAIR, BERNARD	75Y M GHDOHospital (Inpatient)	Add	Add	Add	Add	Add	Add	Add
BAMBERGER, HELEN	81Y F 507.City (Inpatient)					IP Admit	Add	
BLAZER, ROY	92Y M 401.City (Inpatient)			Add	Add	Add	Add	Add
BONNET, LOLA	19Y F 209.City (Inpatient)			IP Admit	IP E&M	IP E&M	IP E&M	Add
DARR, JOSEPH	43Y M 151.PKHospital (Inpatient)	Add	Add	Add	Add	Add	Add	Add
DARR, MOLLY	81Y F 501.City (Inpatient)			IP Admit	IP E&M	IP E&M	IP E&M	Add
DAVIDSON, HENRY	73Y M ICU3.City (Inpatient)	Crit Care	Crit Care	Crit Care	Crit Care	Crit Care	Crit Care	Add
FRANKLIN, SHIRLEY	33Y F ER.City (ER)						Other E&M	
GACY, JOHN	62Y M ICU4.City (Inpatient)	Crit Care	Crit Care	Crit Care	Crit Care	Crit Care	Crit Care	Add
GLASS, RUDY	60Y M Discharged (208.City) (Inpatient)		IP Admit	IP E&M	IP E&M	IP E&M	IP Disch	
HEATH, NEIL							IP Admit	Add
IVEY, AARON							Add	Add
JACOBS, HILLARY							Add	Add

You can also view a summary of charge and visit information for a patient.

1 Click on a patient name to display a summary of charges for their visits.

From the **Visit Summary** window, you can:


2 Add a charge by clicking either the red [Add](#) link or the **Add Charge** button.

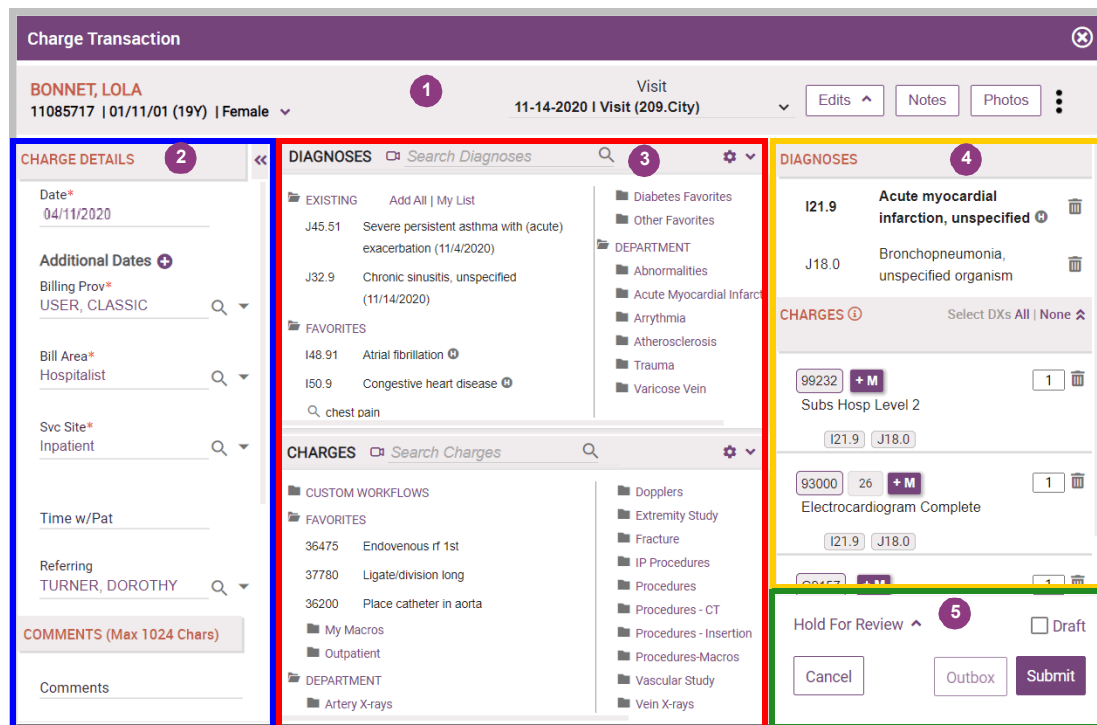
3 Copy a charge by clicking the **Copy** button.

4 Delete a charge by clicking **Delete**.

5 Modify a charge by clicking the purple date link (for example: [02/29/20](#)).

The Charge Transaction Screen


- 1 The **PATIENT HEADING**, located at the top, includes options to change the visits, check for errors, or view clinical notes and photos. It also contains a **More** button  for items such as viewing details, printing, getting help, or setting your screen preferences.
- 2 The **CHARGE DETAILS** (highlighted in blue), displays billing information associated with the entire transaction, such as Service Date and Billing Provider. This area also contains a **Comments** field.
- 3 The **DIAGNOSES** and **CHARGES** sections (highlighted in red), are located in the middle of the screen. They contain a variety of options for finding the diagnosis and charge codes that you want. Once you select a diagnosis or charge code here, it is displayed in the **Selected Codes** section, on the right side of the screen.
- 4 The **SELECTED CODES** section (highlighted in yellow) displays the charges and diagnoses you have selected so far. You can reorder these items via drag and drop, change the quantity, or add modifiers to the charges.
- 5 The **SAVE OPTIONS** are located at the bottom right of the screen (highlighted in green). You can hold for review, submit as a draft, or submit as complete. The options available here vary based on how your user profile is configured.

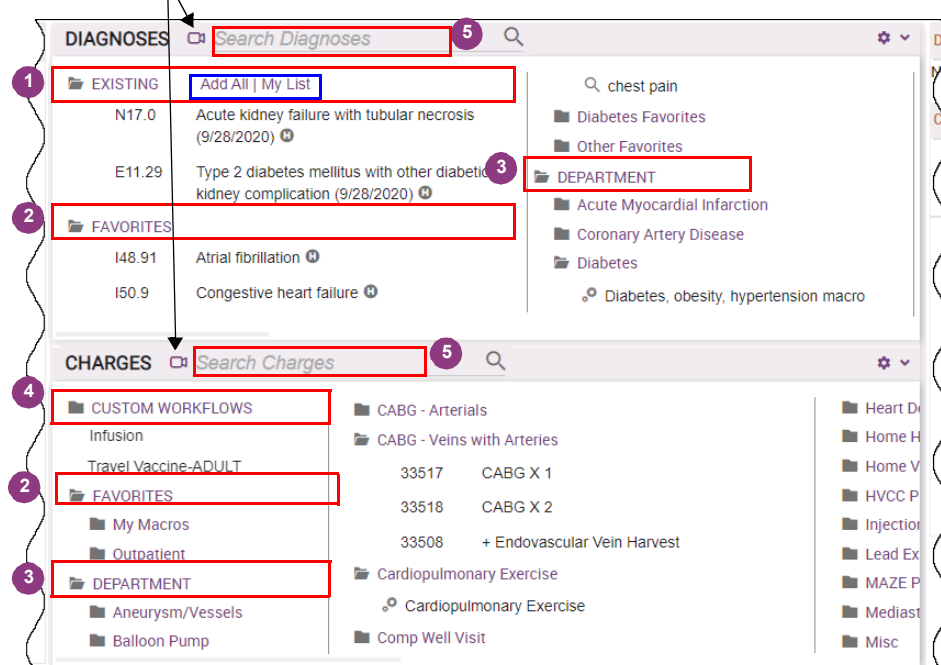


Quick Ways to Find Diagnosis or Charge Codes

Some or all of these options for selecting codes may be available to you:

- 1 **EXISTING:** For diagnoses only, view and select from the patient's list of existing diagnoses. You can click **My List** to filter the list to show just those diagnoses you yourself have used for the patient in the past. Click **Add All** to add all existing diagnoses to the charge transaction (if **My List** is selected when you click **Add All**, then only your diagnoses are added).
- 2 **FAVORITES:** For both charges and diagnoses, view and select from those codes you have identified as your favorites.
- 3 **DEPARTMENT:** For both charges and diagnoses, your department's commonly used codes in are organized into a series of categories. Click any **DEPARTMENT** category to open it, and then select a code.
- 4 **CUSTOM WORKFLOWS:** For charges only, click on a workflow name to open a custom screen and answer questions to identify the services you performed. After you answer the questions, the correct charge codes are automatically selected for you. (This section displays only if configured to be available.)
- 5 **Search:** For both charges and diagnoses, search for a specific code if you cannot find it using any of the options above.

Tip: Click a **Video** icon  to watch a short "How-To" video about a particular section of the screen.



Managing Your Diagnosis and Charge Lists

Making Changes Directly on the Charge Transaction Screen

Some changes can be made directly on the Charge Transaction screen. When you hover your mouse cursor over a code or category, various icons are exposed that allow you to make changes.


Click the white **Favorites** icon to add a code to your **FAVORITES** list.

Click the gold **Favorites** icon to remove a code from your **FAVORITES** list.

Sort the contents of a folder (the folder must be open before the **Sort** icon becomes available).

The screenshot shows the 'DIAGNOSES' and 'CHARGES' sections. In the 'DIAGNOSES' section, a white star icon is shown next to 'E11.29 Type 2 diabetes mellitus with other diabetic kidney complication (9/28/2020)'. In the 'CHARGES' section, a white star icon is shown next to '33533 CABG X 1'. A gold star icon is shown next to 'I48.91 Atrial fibrillation'. A 'Sort' icon (three horizontal lines) is shown next to the 'CABG - Arterials' folder. A 'Settings' icon (gear) is shown at the top right of the 'DIAGNOSES' section.

Making Changes via the List Management Option

Clicking the **Settings** button  at the top right of the **CHARGES** or **DIAGNOSES** sections to open the Charge or Diagnosis List Management screen, where you can make even more changes.

Pin a folder open, so that it always opens by default when you first open the Charge Transaction screen.

Click the white **Favorites** icon next to a **DEPARTMENT** code to add it to your **FAVORITES** list.

Click the white **Favorites** icon next to a **DEPARTMENT** category to create a copy of the category in your **FAVORITES** list. Once created, the copied category can be changed in any way (rename it, add or remove codes, sort it differently).

Add a new folder in **FAVORITES** to help organize your codes.

Click the gold **Favorites** icon next to a code to remove it from your **FAVORITES**.

Sort the contents of a folder.

Edit the name of a **FAVORITE** folder or code.

Show or hide a **DEPARTMENT** folder or code.

The screenshot shows the 'Charge List Management' screen. It has a left sidebar with 'CUSTOM WORKFLOWS', 'FAVORITES', and 'DEPARTMENT' sections. The main area shows a list of folders and codes. Annotations point to various icons: a 'Pin' icon (pushpin) next to 'CABG - Arterials', a 'Sort' icon (three horizontal lines) next to 'CABG - Arterials', a 'Gold Favorites' icon (gold star) next to '99231 Subs Hosp Level 1', a 'White Favorites' icon (white star) next to '33533 CABG X 1', and a 'Show/Hide' icon (eye) next to 'Heart Defect'.