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Managing Your Charge, Diagnosis, and Modifier Lists

There are several different list of charges and diagnoses that are available on the Charge Transaction screen and also on the Problem Selection screen (when entering a problem via the via the **Patients** tab > **Problems** dashboard):

- The charge and diagnosis **Favorites** categories contains those charges and diagnoses that you yourself have personally marked as favorites (or that your administrator has marked as favorites for you).
- The charge and diagnosis **Department** categories contain the charges and diagnoses that your administrator has deemed useful to all members of your department.
- The diagnosis **Existing** list contains all the patient's active existing diagnoses.

In addition, on the Charge Transaction screen only, the favorite modifiers that are displayed when you hover your mouse cursor over the **Add Modifier**  button, consists of those modifiers that you yourself have personally marked as favorites.

The PatientKeeper system allows you to make a substantial number of changes to these lists so that can more easily find the codes you need when entering charges or diagnoses. The changes you can make are described in the topics below

- *Adding or Removing Items to/from the Charge or Diagnosis Favorites Categories*
- *Showing or Hiding Items in the Charge or Diagnosis Department Category*
- *Sorting Items in the Charge or Diagnosis Favorites or Department Categories*
- *Creating a Subcategory for Charge or Diagnosis Favorites*
- *Renaming Items or Subcategories in Charge or Diagnosis Favorites*
- *Deleting a Subcategory from Charge or Diagnosis Favorites*
- *Pinning a Charge or Diagnosis Category or Subcategory Open*
- *Showing or Hiding Numeric Charge or Diagnosis Codes*
- *Showing or Hiding Inactive Diagnoses on the Existing List*
- *Adding or Removing Modifiers to/from your Modifier Favorites List*

Adding or Removing Items to/from the Charge or Diagnosis Favorites Categories

You can mark or unmark any number of items (charge or diagnosis codes, charge macros, diagnosis macro groups, diagnosis search terms, or subcategories) as personal favorites, so that they appear in your charge and diagnosis **Favorites** categories. There are several ways to do this, including:

- *Favoriting/Unfavoriting a Charge or Diagnosis Code After You Select It for Use on the Current Charge Transaction*
- *Favoriting/Unfavoriting a Diagnosis That Is Listed in the Existing Category*
- *Favoriting an Item That Is Listed in the Department Category*
- *Favoriting a Subcategory That Is Listed in the Department Category*
- *Creating a New Charge Macro for the Charge Favorites Category*
- *Creating a New Search Term for the Diagnosis Favorites Category*
- *Unfavoriting an Item That Is Listed in the Favorites Category*

Favoriting/Unfavoriting a Charge or Diagnosis Code After You Select It for Use on the Current Charge Transaction

After selecting a charge or diagnosis for the current charge transaction, you can mark it as a favorite for future use. Or conversely, if the code is *already* on your **Favorites** list, you remove it from all categories and subcategories of your **Favorites** list.

NOTE: When removing codes from your **Favorites**, if you want to remove it from only one specific category of your **Favorites** list, use this method instead: *Unfavoriting an Item That Is Listed in the Favorites Category*.

1. Use any method to select a charge or diagnosis code for the current charge transaction.
2. Hover your mouse cursor over the code on the right side of the screen to expose the **Favorites** button to the left of the code.

- If the code is not yet on your **Favorites** list, the button shows as white: ☆. Click the button to add it to your **Favorites** list.

The button changes to gold and the code is added to the very top of your **Favorites** list. If you want to move it to a different position on your **Favorites** list, see *Sorting Items in the Charge or Diagnosis Favorites or Department Categories*.

- If the code is already on your **Favorites** list, the button shows as gold: ★. Click the button to remove the code from your **Favorites** list.

The button changes to white and the code is removed from all categories and subcategories of your **Favorites** list.

Related topics:

Favoriting an Item That Is Listed in the Department Category

Creating a New Search Term for the Diagnosis Favorites Category

Favoriting a Subcategory That Is Listed in the Department Category

Unfavoriting an Item That Is Listed in the Favorites Category

Favoriting/Unfavoriting a Diagnosis That Is Listed in the Existing Category

When selecting diagnosis codes on the Charge Transaction screen, if you see a diagnosis code displayed in the **Existing** list that you want to add to your **Favorites** list, you can easily do so. Or conversely, if a code from the **Existing** list *already* on your **Favorites** list, you can remove it from all categories and subcategories of your **Favorites** list.

NOTE: When removing codes from your **Favorites**, if you want to remove it from only one specific category of your **Favorites** list, use this method instead: *Unfavoriting an Item That Is Listed in the Favorites Category*.

1. Click on the **Existing** category to open it and review its contents.

A **Favorites** toggle button (☆ or ★) is located to the left of every item in the **Existing** category,

2. Identify the code from the **Existing** category that you want to mark as a favorite.

- If the item is not yet on your **Favorites** list, the button shows as white: ☆. Click the button to add it to your **Favorites** list.

The button changes to gold and the item is added to the very top of your **Favorites** list. If you want to move it to a different position on your **Favorites** list, see *Sorting Items in the Charge or Diagnosis Favorites or Department Categories*.

- If the item is already on your **Favorites** list, the button shows as gold: ★. Click the button to remove the item from your **Favorites** list.

The button changes to white and the code is removed from all categories and subcategories of your **Favorites** list.

Related topics:

Favoriting/Unfavoriting a Charge or Diagnosis Code After You Select It for Use on the Current Charge Transaction





Creating a New Search Term for the Diagnosis Favorites Category


Favoriting a Subcategory That Is Listed in the Department Category

Unfavoriting an Item That Is Listed in the Favorites Category


Favoriting an Item That Is Listed in the Department Category




When selecting charge or diagnosis codes, you may see a charge or diagnosis code, charge macro, diagnosis macro group, or diagnosis search term listed in the **Department** category that you want to add to your **Favorites** list.


1. You can add items to your **Favorites** list using either method below:
 - If you want to add items directly from the Charge Transaction or Problem Selection screen, skip to Step 2 on page 98 below.
 - If you want to work from the Charge or Diagnosis List Management screen (for charge macros and diagnosis macro groups, you must use this method):
 - From the Charge Transaction screen, click **Settings** , located on the far right side of the CHARGES or DIAGNOSES section heading, and then proceed to Step 2 on page 98.
 - From the Problem Selection screen, click **More** , located at the far right side of the heading, and then select the Diagnosis List Management from the menu. Then then proceed to Step 2 on page 98.
 2. Click on the **Department** category and/or subcategories to open them and review their contents.
- A **Favorites** button ( or ) is located to the left of every item in the **Department** categories,
3. Identify the code, charge macro, diagnosis macro group, or search term from a **Department** category that you want to mark as a favorite.

- If the item is not yet on your **Favorites** list, the button shows as white: . Click the button to add it to your **Favorites** list.

The button changes to gold and the item is added to the very top of the main **Favorites** category. If you want to move it to a different position on your **Favorites** list, see *Sorting Items in the Charge or Diagnosis Favorites or Department Categories*.

- If the item is already on your **Favorites** list, the button shows as gold: . You can add this item to your **Favorites** list again, if for example, you want to add it to more than one subcategory. When you click the gold **Favorites** button, the item is added to the main **Favorites** category. (If it is *already* listed in the main **Favorites** category, it won't be added again. First, move that iteration to a subcategory, and then you can add another copy to the main category.)

NOTE: If the Department item is currently hidden (as indicated by this icon ) , you can still add or remove it to/from your **Favorites** list by clicking the **Favorites** button (which shows as white  when not favorited, or gray  when favorited).

4. Click **Close**  at the top right corner of the Charge or Diagnosis List Management screen.

Related topics:

Favoriting/Unfavoriting a Charge or Diagnosis Code After You Select It for Use on the Current Charge Transaction



Creating a New Search Term for the Diagnosis Favorites Category




Favoriting a Subcategory That Is Listed in the Department Category


Unfavoriting an Item That Is Listed in the Favorites Category



Favoriting a Subcategory That Is Listed in the Department Category

When selecting charge or diagnosis codes, you may see an entire subcategory under the **Department** category that you would like to mark as a favorite. When you do so, you are essentially creating a copy of the **Department** subcategory (and all of its contents) in your **Favorites** list. Once that is done, the new **Favorites** subcategory becomes your own, and can be changed in any manner that you see fit. For example, you can rename the subcategory, add or remove items to/from it, sort the items within it, or delete it entirely. None of these changes affect the original **Department** subcategory.

1. Depending on your starting point, use either of these methods:
 - From the Charge Transaction screen, click **Settings** , located on the far right side of the CHARGES or DIAGNOSES section heading.
 - From the Problem Selection screen, click **More** , located at the far right side of the heading, and then select the Diagnosis List Management from the menu.
2. Click on the **Department** category and/or subcategories to open them and review their contents.


A white **Favorites** button  is located to the left of every subcategory name, and either a gold or white **Favorites** button is ( or ) is located to the left of every individual item within each subcategory.

3. Identify the subcategory within the **Department** category that you want to mark as a favorite and click the white **Favorites** button  located to the left of the subcategory name.

NOTE: If the **Department** subcategory is currently hidden (as indicated by this icon ), you can still mark as a favorite by clicking the white **Favorites** button .

A new subcategory of the same name, with all of its contents, is added to the **Favorites** folder (unless you already have a subcategory of the same name in your **Favorites** folder, in which case the new subcategory has “_copy” appended to the name). Note that the **Favorites** button next to the original **Department** subcategory name remains white, but the **Favorites** button next to all the items within the subcategory turn to gold.

This newly created subcategory under **Favorites** is now a separate entity from the **Department** subcategory, and as such, can be fully customized. See the related topics below.

- Click **Close**  at the top right corner of the Charge or Diagnosis List Management screen.

NOTE: You cannot unfavorite a **Department** subcategory. If you want to remove an entire subcategory from your **Favorites** list (whether you created it manually, or you copied from a **Department** subcategory as described above), you must instead delete it. See *Deleting a Subcategory from Charge or Diagnosis Favorites*.

Related topics:

Adding or Removing Items to/from the Charge or Diagnosis Favorites Categories

Sorting Items in the Charge or Diagnosis Favorites or Department Categories

Renaming Items or Subcategories in Charge or Diagnosis Favorites

Deleting a Subcategory from Charge or Diagnosis Favorites

Creating a New Charge Macro for the Charge Favorites Category

Charge Macros are a time-saving feature that allow you to enter an entire group of related charges codes, modifiers, and diagnoses with a single mouse click. For example, a cardiac exam charge macro might include the following:

Charge Codes	Modifiers	Diagnosis Codes
93000: Electrocardiogram, complete		R07.9: Chest pain
93010: Report on transmitted ECG	26: Professional component only	R07.9: Chest pain
83719: Assay of blood lipoproteins	90: Reference (outside) laboratory	R07.9: Chest pain
85007: Differential WBC count	90: Reference (outside) laboratory	R07.9: Chest pain

If you find that you are frequently adding the same set of charges, modifiers, and diagnoses over and over again, you can combine them into a charge macro, so that the next time, you can add the entire set with one click. A charge macro must contain one or more charges, but is not required to contain modifiers or diagnoses. For example, a charge macro might contain just charge codes, or just charge codes and modifiers, if that were more appropriate. Your administrator determines whether or not you can create personal charge macros, based on a setting in your user profile.

If enabled in your user profile, you can create personal charge macros on the fly, as you are entering charges for your patient:

- Select the all the charges, modifiers, and diagnoses that you want to include in the macro, as if you were going to enter them for the patient.
- Once the desired codes are displayed in the Selected Codes section on the right side of the screen, hover your mouse cursor over the **CHARGES** heading in that section to expose the **Create Macro** link

 , and then click the link.

The Create Macro dialog is displayed.

- Enter a name in the **Macro Name** field, such as “Cardiac Macro,” and click **Ok**.

The charge macro is then added automatically to your charges **Favorites** category for future use, under a subcategory called “My Macros.” Although it is not visible for the current charge transaction, it will be available for use the next time you enter or edit a charge transaction.

Settings that control this feature:



Admin - User - Charge Capture - **Can Create/Edit User-Level Charge Macros**

Related topics:

Adding or Removing Items to/from the Charge or Diagnosis Favorites Categories

Unfavoriting an Item That Is Listed in the Favorites Category

Creating a New Search Term for the Diagnosis Favorites Category

If you find that you are searching for the same diagnosis over and over again, you can save your search as a Search Term, so that you can re-use it later. In addition, if you used the **Filter** options when performing your search, you can save that search criteria as part of your Search Term. The Search Term is added to your **Favorites** category for future use. It is preceded by a **Search** icon so that you can distinguish it from regular diagnosis codes, as in these examples:  chest pain or  R07 .



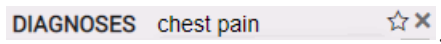
A Search Term consists of the following:


- A name: This is simply a label for the Search Term. The name is often the same as the search phrase, but can be different.
- A search phrase: This is the phrase that will actually be placed into the **Search** field and used when the search is executed. It can consist of one or more words (“chest pain”), or a partial code (“R07”).
- Filters: A Search Term can include one or more filters, but is not required to do so.

There are a few rules that govern how search terms can be named:

- You *cannot* create two personal Search Terms with the same name (the application will prevent you from doing so).
- You *can* create multiple Search Terms that use the same search phrase, but have different filters. For example, you might have two Search Terms that search for the phrase “diabetes,” one with a filter of “type 1” and another with a filter of “type 2.” These two Search Terms would be required to have different names.
- You *can* create a Search Term that uses the same name as an existing **Department** search term.

To create a Search Term:

1. Click into the diagnosis **Search** field and type a partial or complete code or a description.
A list of potential matches is displayed.
2. (Optional) Use the **Filter** button  to further narrow the search results to a more concise list, as described in *Using the Filter Option for Diagnoses*.
The search results are refreshed to show only those results that match the criteria you selected via the **Filter** criteria.
3. Click the white **Favorites** icon  at the far right of the diagnosis **Search** field
 .
4. In the Favorite Search Name dialog box, give the **Search Term** a name (the phrase you used in Step 1 is the default name), and then click **OK**.

The **Search Term** is added to the top of the **Favorites** category for future use, and is preceded by a **Search** icon, as in this example:  chest pain .

Related topics:

Favoriting/Unfavoriting a Charge or Diagnosis Code After You Select It for Use on the Current Charge Transaction







Favoriting an Item That Is Listed in the Department Category

Favoriting a Subcategory That Is Listed in the Department Category

Unfavoriting an Item That Is Listed in the Favorites Category

Unfavoriting an Item That Is Listed in the Favorites Category

While reviewing the contents of your charge or diagnosis **Favorites** category, you may decide that a particular charge or diagnosis code, charge macro, diagnosis macro group, or search term is no longer useful and wish to remove it. (Charge macros and diagnosis macro groups can only be removed via the Charge or Diagnosis List Management screen, respectively.)

1. You can remove items from your **Favorites** list using either method below
 - If you want to remove it directly from the Charge Transaction or Problem Selection screen, skip to Step 2 on page 102 below.
 - If you want to work from the Charge or Diagnosis List Management screen (for charge macros and diagnosis macro groups, you must use this method):
 - From the Charge Transaction screen, click **Settings** , located on the far right side of the CHARGES or DIAGNOSES section heading, and then proceed to Step 2 on page 98.
 - From the Problem Selection screen, click **More** , located at the far right side of the heading, and then select the Diagnosis List Management from the menu. Then then proceed to Step 2 on page 102.
2. Click on the **Favorites** category to open it and review the contents. If there are subcategory folders defined, click on them to expand them as well so that you can review their contents.
 - A gold **Favorites** button  is located to the left of every diagnosis code or search term.
 - A **Delete** button  is located to the right of every charge macro or diagnosis macro group.
3. Identify a charge or diagnosis code, charge macro, diagnosis macro group, or search term in the **Favorites** main category or in a subcategory that you want to unfavoritize and then take one of the actions below:
 - Click the gold **Favorites** button  to the left of the charge or diagnosis code, or search term, or
 - Click the **Delete** button  to the right of the charge macro or diagnosis macro group.

The item is immediately removed from the **Favorites** category or subcategory. Please note that if the same item is listed multiple times in your **Favorites** list (in different subcategories), each one treated independently from the others. This allows you to unfavoritize it from one subcategory, but keep it in another.



4. Click **Close**  at the top right corner of the Charge or Diagnosis List Management screen.



Related topics:




Adding or Removing Items to/from the Charge or Diagnosis Favorites Categories

Showing or Hiding Items in the Charge or Diagnosis Department Category

Your administrator defines the charge and diagnosis items that are included within the **Department** category for all users in the department. If an item or subcategory is not useful to you, you can hide it in order to make your charge or diagnosis lists more streamlined. At any time, you can also show it again if you decide it is something you need after all. (Note that you cannot show/hide items in the **Existing**, **Favorites**, or **Custom Workflows** categories.)

1. Depending on your starting point, use either of these methods:
 - From the Charge Transaction screen, click **Settings** , located on the far right side of the CHARGES or DIAGNOSES section heading.
 - From the Problem Selection screen, click **More** , located at the far right side of the heading, and then select the Diagnosis List Management from the menu.
2. Click on the **Department** category to open it and review the contents. If there are subcategory folders defined, click on them to expand them as well so that you can review their contents.

A **Show/Hide** toggle button ( or ) is located to the right of every subcategory, as well as next to each item within that subcategory.

3. Identify an item or subcategory that you want to show or hide and then click the **Show/Hide** button next to that item to change its status.
 - When an item or subcategory is currently visible, the **Show/Hide** button looks like this: 
 - When an item or subcategory is currently hidden, the **Show/Hide** button looks like this: 
4. Click **Close**  at the top right corner of the Charge or Diagnosis List Management screen.

Related topics:

Adding or Removing Items to/from the Charge or Diagnosis Favorites Categories

Sorting Items in the Charge or Diagnosis Favorites or Department Categories



Sorting Items in the Charge or Diagnosis Favorites or Department Categories

On the various charge and diagnosis lists, items are sorted as follows:


- **Existing:** Diagnosis codes are sorted in reverse chronological order by the date last used (most recently used codes first).

- **Favorites:** After you mark an item as a favorite, it is immediately added to the very top of the **Favorites** category.
- **Department:** The codes and subcategories have a specific, predefined sort order, as defined by your administrator.

At any time, you can change the order in which the codes are listed in these categories, to display them in a more meaningful manner.

1. You can sort items using either method below.
 - If you want to sort directly on the Charge Transaction or Problem Selection screen, start at Step 2 on page 104 below.
 - If you want to work from the Charge or Diagnosis List Management screen:
 - From the Charge Transaction screen, click **Settings** , located on the far right side of the CHARGES or DIAGNOSES section heading, and then proceed to Step 2 on page 104.
 - From the Problem Selection screen, click **More** , located at the far right side of the heading, and then select the Diagnosis List Management from the menu. Then then proceed to Step 2 on page 104.
2. Click on the **Existing**, **Favorites**, or **Department** category to open it and review the contents. If there are subcategory folders defined, click on them to expand them as well so that you can review their contents.

A **Sort** button  is located to the right of the **Existing**, **Favorites**, and **Department** main categories, as well as next to the subcategories within those categories. Note that a category/subcategory must be open before the **Sort** button becomes available.

3. Identify a category whose codes or subcategories you want to reorder and then click **Sort**  next to that category.
4. Choose the manner in which you want to sort:
 - **Sort Folder Content by Code:** Sorts the items within the selected category alphanumerically by code. This does not impact the content of any subfolders within the category.
 - **Sort Folder Content by Description:** Sorts the items within the selected category alphabetically by description. This does not impact the content of any subfolders within the category.
 - **Sort Folder Content by Last Used:** This option appears only for the **Existing** category. It sorts the diagnoses by the date the code was last used for the patient (which is listed in parenthesis next to each diagnosis).
 - **Sort Subfolders by Description:** This option appears only if subfolders exist within the selected category. It sorts the subfolders alphabetically but does not impact the other content within the current folder.
 - **Drag and Drop:** If you are working from the Charge or Diagnosis List Management screen, you can use drag and drop to change how items are sorted. Just click and hold on an item, drag it to a new position, and drop it.
 - In the **Favorites** category:

- ◆ If you are sorting the individual charge or diagnosis codes, charge macros, macro groups, or search terms *within* a given folder, you can just drop an item to a new location within the folder contents.
- ◆ If you drop a charge or diagnosis code, charge macro, diagnosis macro group, diagnosis search term, or folder directly on top of a folder name, it goes *into* that folder.
- ◆ If you drop a folder just above or just below another folder name (at the top third or bottom third of the folder name), it goes above or below that folder, at the same level.
- In the **Department** category:
 - ◆ Only top-level **Department** folders can be dragged and dropped. Subfolders and individual items within a folder cannot be moved.
 - ◆ If you drop a top-level folder just above or just below another top-level folder name (at the top third or bottom third of the folder name), it goes above or below that folder, at the same level.
 - ◆ **Department** folders cannot be moved into another **Department** folder. For example, if you drop a folder directly on top of another folder, it does not move.
- **Department** folders cannot be moved into the **Favorites** folder, or vice versa.

5. Click **Close**  at the top right corner of the Charge or Diagnosis List Management screen.



Related topics:

Adding or Removing Items to/from the Charge or Diagnosis Favorites Categories

Showing or Hiding Items in the Charge or Diagnosis Department Category

Creating a Subcategory for Charge or Diagnosis Favorites

If you designate a lot of charge or diagnosis codes as favorites, your **Favorites** list may eventually become too long and disorganized to be useful. In this case, you can create subcategory folders to better organize your **Favorites** list. (Note that you cannot create new subcategories in the **Existing**, **Department**, or **Charge Workflow** categories.)

1. Depending on your starting point, use either of these methods:
 - From the Charge Transaction screen, click **Settings** , located on the far right side of the CHARGES or DIAGNOSES section heading.
 - From the Problem Selection screen, click **More** , located at the far right side of the heading, and then select the Diagnosis List Management from the menu.
2. Click on the **Favorites** category to open it and review the contents. If there are already subcategory folders defined, click on them to expand them as well so that you can review their contents.
3. Add a new folder for a subcategory:
 - Click **Add Folder** just below the **Favorites** heading to add a child folder directly beneath it.
 - Click **Add Folder** just below an existing subcategory to add a child folder directly beneath it.

A new folder is created with a default name of “New Folder.”

- Click into the folder name field, replace the words “New Folder” with the desired subcategory name, and then click anywhere outside of the field.

The newly named subcategory is created. You can now add items to it by dragging an item from elsewhere in the **Favorites** category and dropping it into the newly named folder (drop it directly onto the folder name).

- Click **Close**  at the top right corner of the Charge or Diagnosis List Management screen.

Related topics:

Adding or Removing Items to/from the Charge or Diagnosis Favorites Categories

Sorting Items in the Charge or Diagnosis Favorites or Department Categories

Renaming Items or Subcategories in Charge or Diagnosis Favorites




Deleting a Subcategory from Charge or Diagnosis Favorites

Renaming Items or Subcategories in Charge or Diagnosis Favorites

You can rename any item listed in the charge or diagnosis **Favorites** category, which includes the items below. When you rename one of these items, it is renamed only in your personal **Favorites** list; it is not changed system-wide.


- Subcategory names
- Charge code descriptions
- Charge macro names
- Diagnosis code descriptions
- Diagnosis macro group names
- Diagnosis search term names

To rename an item:

- Depending on your starting point, use either of these methods:
 - From the Charge Transaction screen, click **Settings** , located on the far right side of the CHARGES or DIAGNOSES section heading.
 - From the Problem Selection screen, click **More** , located at the far right side of the heading, and then select the **Diagnosis List Management** from the menu.
- Click on the **Favorites** category to open it and review the contents. If there are subcategory folders defined, click on them to expand them as well so that you can review their contents.
- Identify the item or subcategory that you want to rename, and then click **Edit**  to the right of its name. The name becomes an editable field.

- Click into the name field, change or replace the existing name with the desired name, and then click anywhere outside of the field.

The item is renamed.

- Click **Close**  at the top right corner of the Charge or Diagnosis List Management screen.

Related topics:

Adding or Removing Items to/from the Charge or Diagnosis Favorites Categories




Creating a Subcategory for Charge or Diagnosis Favorites

Deleting a Subcategory from Charge or Diagnosis Favorites


Deleting a Subcategory from Charge or Diagnosis Favorites

You can delete a charge or diagnosis **Favorites** subcategory if it is no longer useful. When you delete a subcategory, that subcategory and all the items within it are removed from the **Favorites** list. If an item was listed in the deleted subcategory, *as well as in another subcategory* elsewhere within **Favorites**, it is *not* removed from the other subcategory.

NOTE: You cannot delete subcategories in the **Department** folder. Instead, you can hide them.

- Depending on your starting point, use either of these methods:
 - From the Charge Transaction screen, click **Settings** , located on the far right side of the CHARGES or DIAGNOSES section heading.
 - From the Problem Selection screen, click **More** , located at the far right side of the heading, and then select the Diagnosis List Management from the menu.
- Click on the **Favorites** category to open it and review the contents. If there are subcategory folders defined, click on them to expand them as well so that you can review their contents.
- Identify the subcategory that you want to delete, and then click **Delete**  to the right of the subcategory name.
- When asked to confirm the deletion, click **Delete**.

The subcategory and all the items within it are removed from the **Favorites** category.

- Click **Close**  at the top right corner of the Charge or Diagnosis List Management screen.

Related topics:

Adding or Removing Items to/from the Charge or Diagnosis Favorites Categories



Creating a Subcategory for Charge or Diagnosis Favorites






Renaming Items or Subcategories in Charge or Diagnosis Favorites

Showing or Hiding Items in the Charge or Diagnosis Department Category

Pinning a Charge or Diagnosis Category or Subcategory Open

You can “pin” a charge or diagnosis category or subcategory open, so that it is always displayed as “open” whenever you access the Charge Transaction screen. You can do this for the main **Existing**, **Favorites**, **Department**, and **Custom Workflows** categories, as well as for any of the subcategories underneath them.


- Depending on your starting point, use either of these methods:
 - From the Charge Transaction screen, click **Settings** , located on the far right side of the CHARGES or DIAGNOSES section heading.
 - From the Problem Selection screen, click **More** , located at the far right side of the heading, and then select the Diagnosis List Management from the menu.


A **Pin** toggle button ( or ) is located to the right of the **Existing**, **Favorites**, **Department**, and **Custom Workflows** categories, as well as next to all of the subcategories underneath them.
- Identify the main category (**Existing**, **Favorites**, **Department**, or **Custom Workflows**) or subcategory that you want to pin open or closed. Then click the **Pin** button next to that item.
 - When a category/subcategory is currently pinned open, the **Pin** button looks like this: . Note that when you pin open a subcategory (such as a subcategory under **Favorites**), it automatically also pins open the parent category (the **Favorites** category in this example).
 - When a category/subcategory is currently pinned closed, the **Pin** button looks like this: . Note that when you pin closed a main category (such as **Favorites**), all subcategories underneath it are automatically pinned closed as well.
- Click **Close**  at the top right corner of the Charge or Diagnosis List Management screen.

Showing or Hiding Numeric Charge or Diagnosis Codes

You can opt to either show or hide the numeric CPT or ICD-10 codes for all the charges and diagnoses that are listed on the Charge Transaction screen or the Problem Selection screen. When you choose to show the codes, the screen shows both codes and descriptions. When you choose to hide the codes, the screen shows only the descriptions. This preference affects all codes in the **Existing**, **Favorites**, and **Department** categories, and it also shows or hides the codes in the search results when you perform a search for a charge or diagnosis.


The setting for this preference is available in two locations and each acts independently:

- On the Problem Selection screen when entering diagnoses via the **Patients tab > Problems** dashboard. Whatever choice you make here (to show or hide the codes) affects the diagnoses on only the Problem Selection screen.
 - Click **More**  at the far right side of the Problem Selection heading.
 - Check or uncheck (the default) the box for the **Hide diagnosis codes** option, as desired.

- On the Charge Transaction screen there is a similar option to show or hide codes, but in this case it affects *both* diagnosis codes *and* charge codes. Whatever choice you make here affects only the Charge Transaction screen.
 - Click the **More** button  in the upper right corner of the Charge Transaction screen.
 - Select **Screen Settings**.
 - Set the **Display charge and diagnosis codes** option to **Yes** (the default) or **No** as desired.


Showing or Hiding Inactive Diagnoses on the Existing List








You can opt to either show or hide any discontinued diagnoses on the patient's **Existing** list on the Charge Transaction screen. Diagnosis codes are updated each year, and as a result, a code that was included on your patient's **Existing** list in the past (such as an old ICD-9 code) may be inactive today. Please note that this is different from a patient diagnosis that has been marked as resolved or inactive because the patient no longer has the condition. Patient diagnoses that were marked as resolved or inactive never show on the **Existing** list.

- Click the **More** button  in the upper right corner of the Charge Transaction screen.
- Select **Screen Settings**.
- Set the **Show inactive existing diagnoses** option to **Yes** (the default) or **No** as desired.

Adding or Removing Modifiers to/from your Modifier Favorites List

You can add or remove any modifier to/from your modifier **Favorites** list. Once you add a modifier to your

Favorites list, you can then quickly select it by hovering your mouse cursor over the **Add Modifier**  button, without having to open the Modifiers Selection window (as described in *Selecting Modifiers from Your Modifier Favorites List*).

- Select at least one charge code for the transaction, using any selection method.
- In the Selected Codes section on the right side of the screen, click **Add Modifier** , located to the right of the charge code (for example:  ).
The Modifiers Selection window opens, displaying a list of all modifiers.
- Add or remove a modifier from the modifier **Favorites** list as follows:
 - If a modifier is not yet on your **Favorites** list, there is a white **Favorites** button  located in the left column. Click the white **Favorites** button for the modifier that you want to add to your **Favorites** list (it then changes to gold ).
 - If a modifier is *already* on your **Favorites** list, the **Favorites** button is gold  . To remove a modifier from the **Favorites** list, click the gold **Favorites** button (it then changes to white ).
- Click the **X** button to close the Modifier Selection window.

