Using Revenue Reports to Enter Charges – For Providers

There are many different Revenue Reports; each is a report that is tailored to a specific workflow, and shows only the information that is necessary for that workflow. There are several standard reports illustrated below, but your administrator may rename or tailor these to fit your organization's needs. Most of the buttons and controls are similar on all reports and are described in the examples below. This first example is the Patient Charge Status report.

Expand/Collapse Button
Click here to close (or open) the entire criteria section (the dark gray area), so that you have more room to view the report in the Display Area.

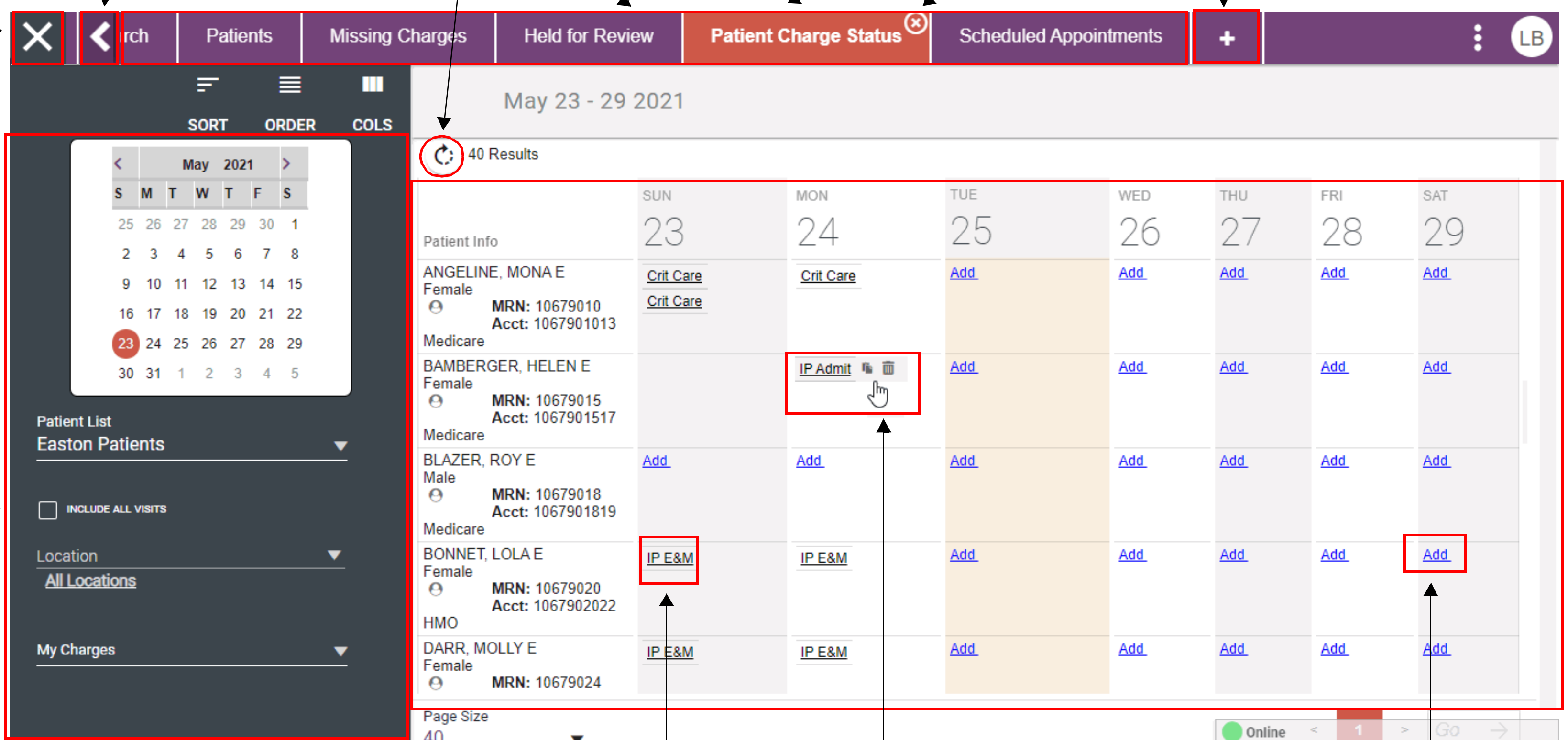
Left and Right Arrows
If there are more open tabs than can fit across the screen, use these arrows to scroll left or right to see the other tabs.

Refresh Button
Click to update the information in the Display Area.

Navigation Tabs
Each tab represents a different screen. The currently open screen is orange.

Click X to Close
Hover your mouse over a tab to expose an **X** icon, then click it to close the tab.

Open New Screen
Click here to view a list of screens and open a different one.



Run-Time Filters
Use the calendar to select a different week, or the other filter fields to narrow the report down to the specific information that you want to see.

Display Area
This area displays the report contents.

Click to Edit or View an Existing Charge
Click a charge category link to open a transaction for viewing or editing.

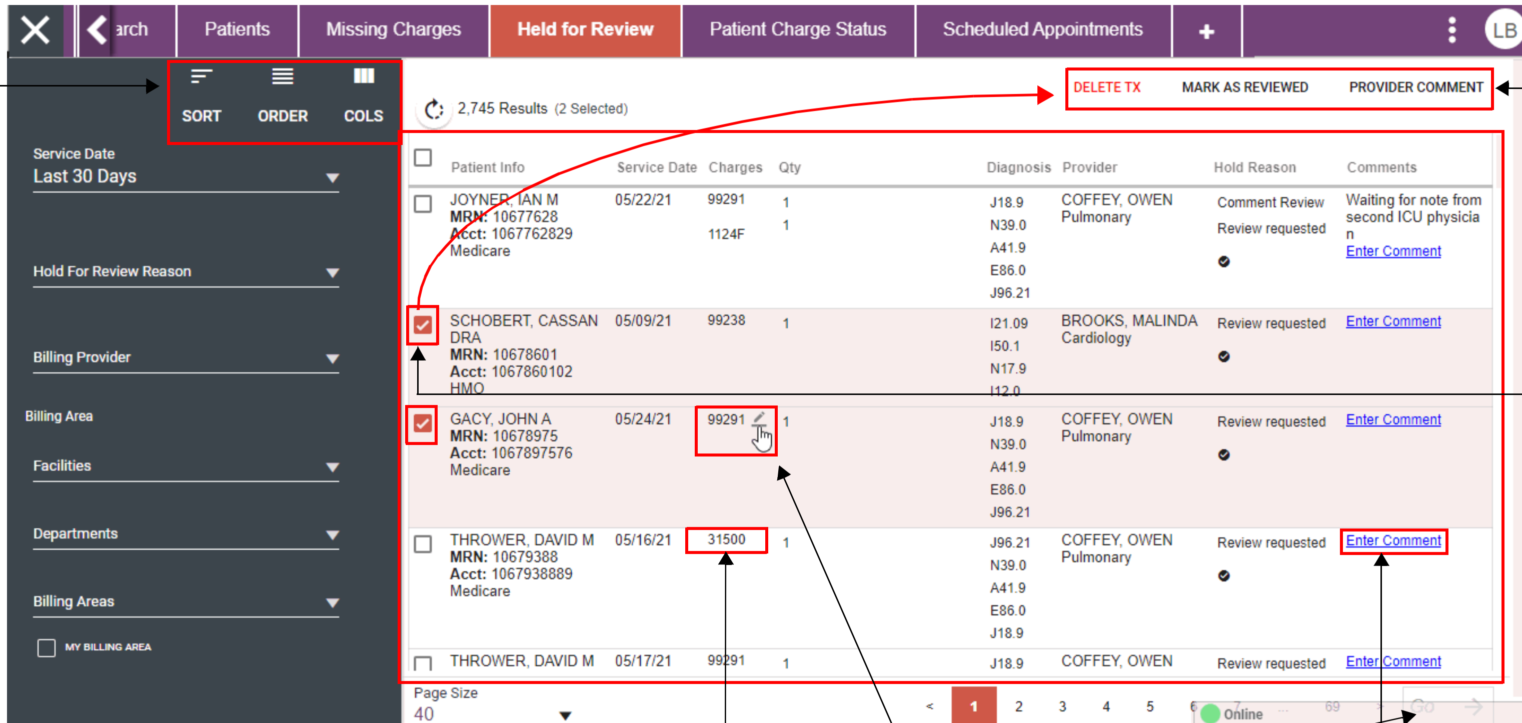
Hover to Expose Copy and Delete icons
Hover your mouse over the link to expose icons to copy or delete the charge transaction.

Click to Add a New Charge
Click the Add link to enter a charge for this visit day.

Other Revenue Reports

Other Revenue Reports might use a different format. Below is an example of the Held for Review report that would be used by supervisory physicians to review charges that were held for review. It shows a list the transactions that are held for review, with options to take action on those transactions.

SORT, ORDER, and COLS Buttons
Use these buttons to:
SORT: Change the sort order of the report.
ORDER: Change the order in which the columns are listed, left to right across the top of the report.
COLS: Add or remove columns on the report.



2 Action Buttons
After selecting one or more charge transaction rows (1), click a button here to perform an action on all those transactions.

1 Selection Checkboxes
Some reports have selection checkboxes next to the charge transactions. Check one or more boxes to select the transactions, and then click a button in the top right (2) to take an action on all those transactions.

Paging Controls
By default, each page shows 40 rows (scroll down to see all the rows).

- Change the number of rows per page.
- Click a page number to jump to that page.
- Enter a specific page number to jump to that page.

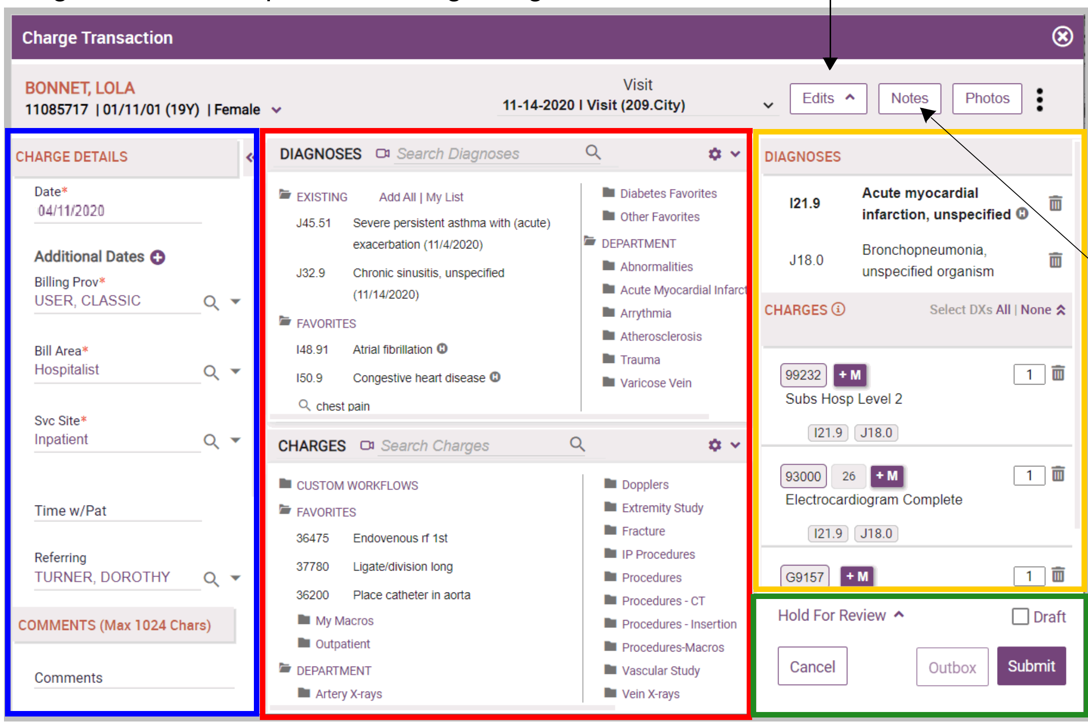
Click to Edit or View an Existing Transaction
Click a charge code link to open a transaction for viewing or editing.

Links to Edit Codes Directly on Report Screen
On some reports, the charge codes, quantity, modifiers, or diagnosis codes can be edited directly on the report screen (without opening the charge). Hover your mouse cursor over the code to expose an **Edit** icon, and then click it. You can then change, add, or remove codes.

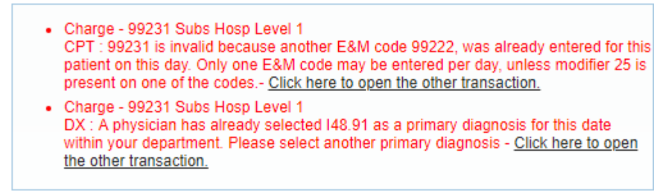
Click to Enter a Comment
Click a link to enter a comment on this one transaction.

Entering or Editing Charges on the Charge Transaction Screen

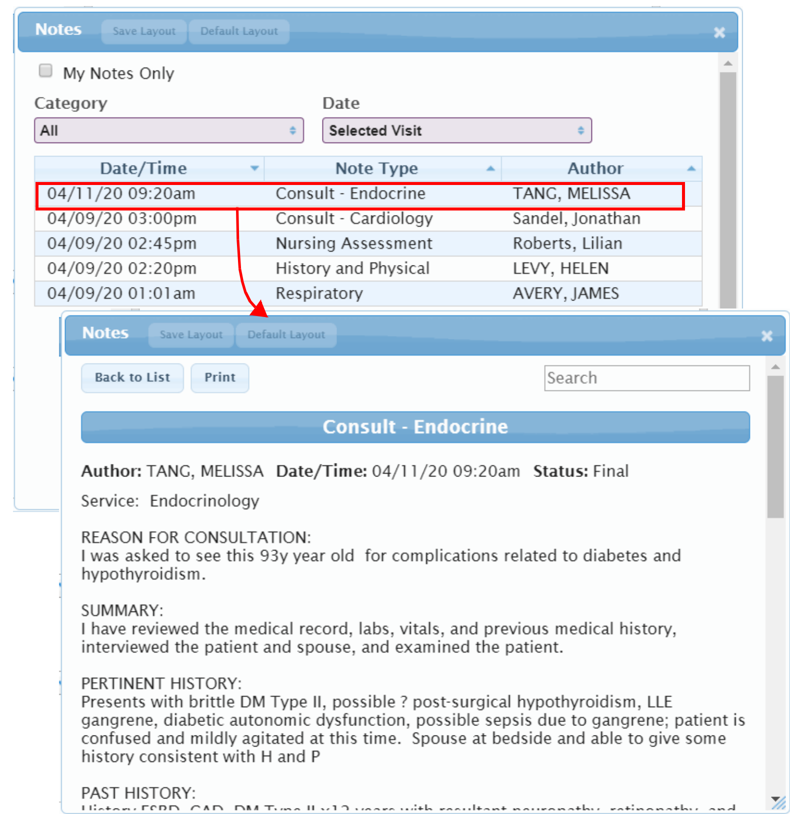
When you click on an Add link on a charge report, the Charge Transaction screen opens so that you can enter a new charge transaction. Or you might click on a charge code link to open an existing charge to make corrections.



If there are any errors, they are shown in a dialog box at the top of the screen, similar to the example below. You can also click the **Edits** button at any time to check the transaction for errors.



Click the **Notes** button to display a list of the patient's clinical notes. Then click on a note from the list to view it.

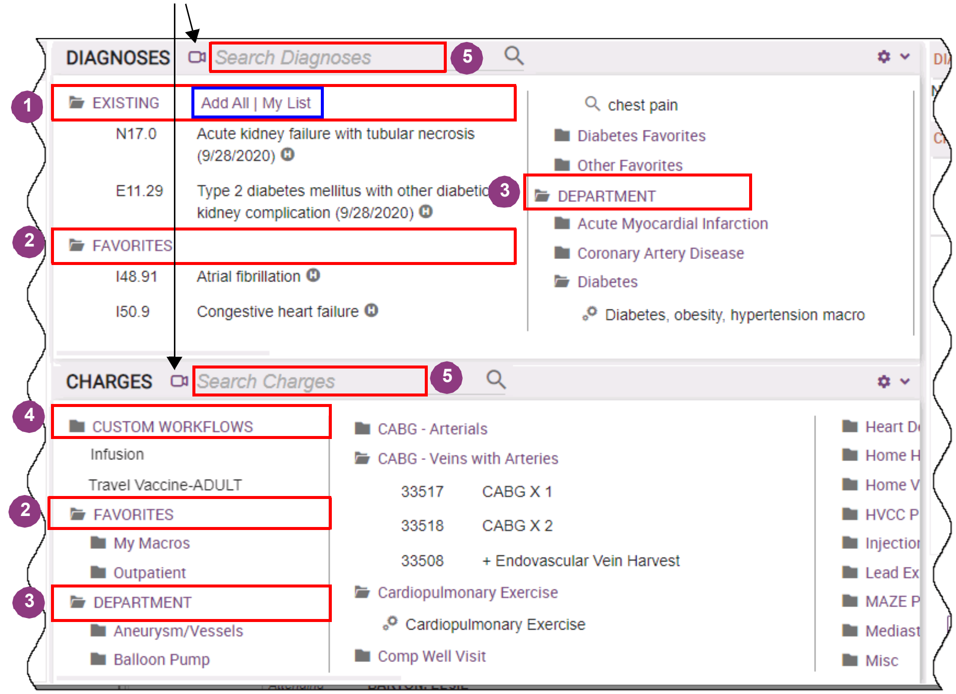


1. The **PATIENT HEADING**, located at the top, includes options to change the visits, check for errors, or view clinical notes and photos. It also contains a **More** button ⋮ for items such as viewing details, printing, getting help, or setting your screen preferences.
2. The **CHARGE DETAILS** (highlighted 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 **DIAGNOSIS a**nd **CHARGE Search** 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 OPTONS** are located at the bottom right of the screen (highlighted in green). You can hold for review, save as draft, or save 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:

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



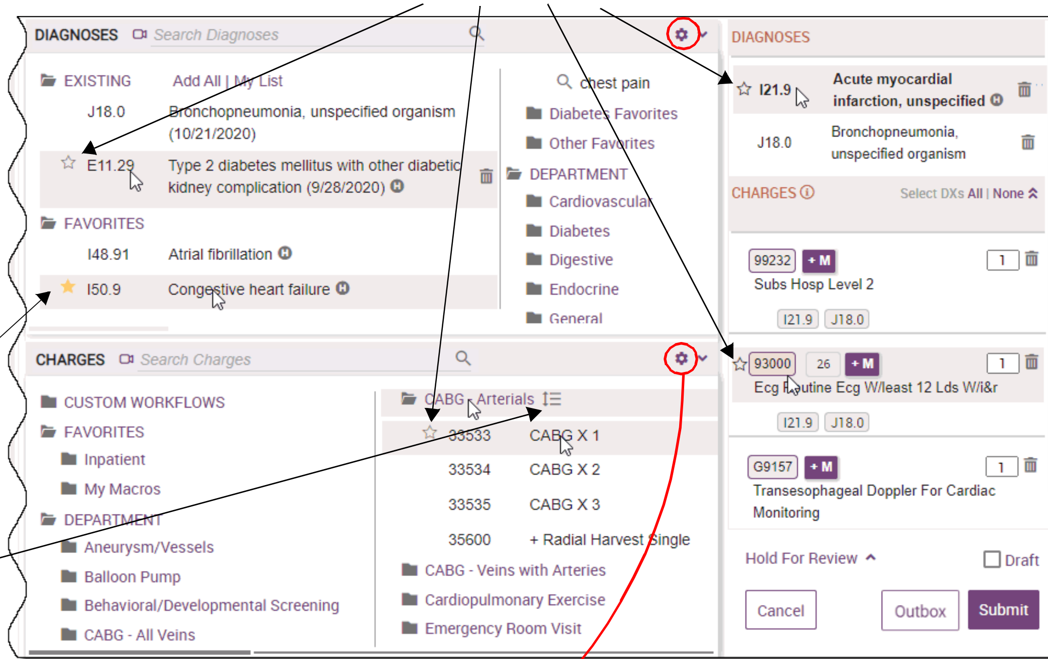
1. **EXISTING**: For diagnoses only, view and select from the patient's list of existing diagnoses. You can click **My List** to filter the list to show just those diagnoses you yourself have used for the patient in the past. Click **Add All** to add all existing diagnoses to the charge transaction (if **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 that were 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.

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).

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.

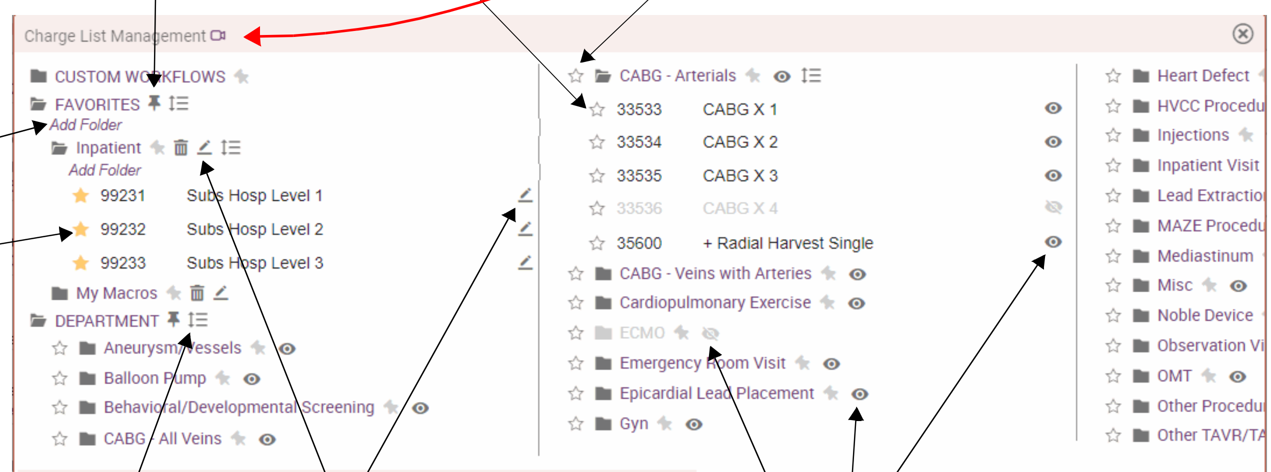
Pin a folder open, so that it always opens by default when you first open the Charge Transaction screen.

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.