

Creating a Billing Picklist

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The billing picklist allows you to create a list of frequently used codes giving you the ability to quickly select and add the codes you use most often to a visit.

- The billing picklist can be set up under **Billing > Fee Schedule**.









The screenshot shows a navigation menu with three main categories: **Billing**, **Account**, and **Marketplace**. Under the **BILLING** section, the following items are listed: Billing Summary, Live Claims Feed, Patient Payments, Day Sheet, Transactions, Remittance Reports, Unmatched ERAs, Insurance Credit Card Payments, Accounts Receivable, Patient Statements, Product/Procedure, Patient Balance Ledger, **Fee Schedule** (highlighted in blue), Underpaid Items, Adjustment Master, Sales Tax, and Billing Log.

- When adding a new or updating an existing CPT/HCPCS/Custom Code, you can add a picklist category at the bottom. The name you enter here is what will be used to pull up that listing of codes.

The screenshot shows the 'Fee Schedule' form with a 'Create' button and a close 'x' icon. The form contains the following fields:

- Code**: A dropdown menu with a 'Required' label.
- Base price**: A text input with a '\$' symbol, '0.00', and a 'Required' label.
- Expected Reimbursement**: A text input with a '\$' symbol, '0.00', and a note: 'Typical allowed amount for payer. Not used if blank.'
- CPT/HCPCS Modifier**: Four empty input boxes.
- Office**: A dropdown menu.
- NDC Code**: A dropdown menu.
- NDC Quantity**: A text input with '1.000'.
- NDC Units**: A dropdown menu with '-----'.
- Payer id**: A text input with a note: 'Use 'Cash' for self pay and cash patients.'
- Plan Name**: A text input.
- Custom description**: A text input with a note: 'Custom description of code.'
- Picklist category**: A text input, highlighted with a blue box, with a note: 'Optional: Category to organize the code into.'

- Sample codes could include the following. They will also be visible on your fee schedule.

Picklist		
Vitamin		
Vitamin		
Office Visit		
Med Equipment		

To use Pick Lists

From the Live Claims Feed:

- From the patient detail screen, click on **Billing Pick List**.

Billing Status ▼ Bill Insurance

ICD Version ▼ ICD-10

Primary Insurer ▼ - Default -

Secondary Insurer ▼ - Default -

Billing Provider: ▼ - If different to provider -

Supervising Provider: ▼ - If different to provider -

Pt Payment \$ 0 +

Payment Profile ▼ Insurance

Pt Payment Due

Billing Profile ▼ Select Profile +

Billing Pick List Choose from Pick List

Diagnosis Pick List Choose from Pt Problems

- A separate window will open where you can type the picklist category name you specified in the fee schedule.

Choose Codes to Include In Billing For This Appointment

▼ + Add Selected Codes

	Selected Procedures & Product Codes	Type	Picklist Category
No procedures selected.			
	ICD10 Diagnosis Codes	Type	Picklist Category
1 - 19 OF 19	Procedure & Product Codes	Type	Picklist Category
+	0011A: ADM SARSCOV2 100MCG/0.5ML1ST	CPT	
+	31717: BRONCHIAL BRUSH BIOPSY	CPT	
+	91300: SARSCOV2 VAC 30MCG/0.3ML IM	CPT	
+	97545: WORK HARDENING	CPT	
+	99203: OFFICE O/P NEW LOW 30-44 MIN	CPT	
+	99212: OFFICE O/P EST SF 10-19 MIN	CPT	
+	99213: OFFICE O/P EST LOW 20-29 MIN	CPT	
+	99214: OFFICE O/P EST MOD 30-39 MIN	CPT	
+	A1: custom code custom descript	HCPCS	
+	A9999: Dme supply or accessory nos	HCPCS	

- When you type the picklist category name in the box, it will show you the codes you have attached to that

picklist category.

Choose Codes to Include In Billing For This Appointment

vitamin + Add Selected Codes

Selected Procedures & Product Codes	Type	Picklist Category
No procedures selected.		
84207: ASSAY OF VITAMIN B-6		
84446: ASSAY OF VITAMIN E		
J3420: Vitamin b12 injection		

From the appointment window:

- Select the Billing tab and select **Choose Codes from Pick List**

Appointment **Billing** Eligibility Vitals Growthcharts Flags Log Comm. Revisions Custom Data MU Helper

Institutional Claim Patient SuperBill Clinical Note Billing Details Other Forms

Billing Status Bill Insurance

ICD Version ICD-10

Primary Insurer - Default -

Secondary Insurer - Default -

Patient Payment \$ 0

Pre Authorization Approval

Referral #

Payment Profile Insurance

Billing Profile

Billing Pick List **Choose Codes from Pick List** ←

Diagnosis Pick List Choose Codes from Pt Problems

HCFA Box 10 - Is patient's condition related to:

Employment No

Auto Accident No

Other Accident No

Onset Date Type Onset of Current Symptoms

Onset Date

Other Date Type - Other Date Type -

Other Date

- The window that pops up is the same that appears when you access it from the Live Claims Feed.
 - Type the name of the category in the blue box to see codes associated with that Picklist.

Choose Codes to Include In Billing For This Appointment

code/ description/ picklist + Add Selected Codes

Selected Procedures & Product Codes	Type	Picklist Category
No procedures selected.		
ICD10 Diagnosis Codes		
1 - 19 OF 19		
Procedure & Product Codes		
+	0011A: ADM SARSCOV2 100MCG/0.5ML1ST	CPT
+	31717: BRONCHIAL BRUSH BIOPSY	CPT
+	91300: SARSCOV2 VAC 30MCG/0.3ML IM	CPT
+	97545: WORK HARDENING	CPT
+	99203: OFFICE O/P NEW LOW 30-44 MIN	CPT
+	99212: OFFICE O/P EST SF 10-19 MIN	CPT
+	99213: OFFICE O/P EST LOW 20-29 MIN	CPT
+	99214: OFFICE O/P EST MOD 30-39 MIN	CPT
+	A1: custom code custom descript	HCPCS
+	A9999: Dme supply or accessory nos	HCPCS

