

Creating a Billing Picklist

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Billing Picklist

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.









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

- 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 a 'Fee Schedule' form with 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 small square 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 field highlighted with a blue border, 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:

1. 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

code/ description/ picklist ↓ + 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.			

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

ICD Version ICD-10 Employment No

Primary Insurer - Default - Auto Accident No

Secondary Insurer - Default - Other Accident No

Patient Payment \$ 0 +

Pre Authorization Approval Onset Date Type Onset of Current Symptoms o

Referral # Onset Date

Payment Profile Insurance Other Date Type - Other Date Type -

Billing Profile + Other Date

Billing Pick List Choose Codes from Pick List ←

Diagnosis Pick List Choose Codes from Pt Problems

- 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			
		Type	Picklist Category
1 - 19 OF 19			
	Procedure & Product Codes	Type	Picklist Category
+	0011A: ADM SARSCOV2 100MCG/0.5ML1ST	CPT	
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+	91300: SARSCOV2 VAC 30MCG/0.3ML IM	CPT	
+	97545: WORK HARDENING	CPT	
+	99203: OFFICE O/P NEW LOW 30-44 MIN	CPT	
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