

Using a Billing Picklist

08/23/2024 8:10 am EDT

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.

The billing picklist can be set up under:

1. **Billing > Fee Schedule.**

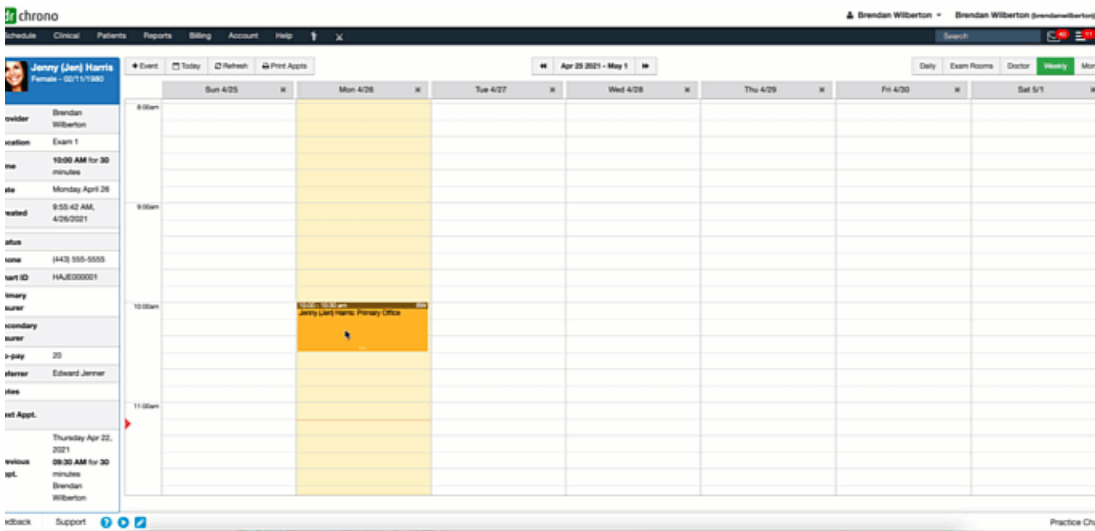
See our article for more information on the [fee schedule](#) or [Creating a Billing Picklist](#) article.

To access the billing pick list from the appointment window:

1. Select the **Billing** tab.
2. Click **Choose Codes from Pick List**.
3. Select the codes by clicking on the + next to the code. You can also search for a code.
4. When finished, select + **Add Selected Codes** and **Save**.


You can also access the Pick List through the clinical note.

1. Open the note, and select **Billing** from the menu on the left.
2. Select **Billing Pick List**. Select the codes by clicking on the + next to the code. You can also search for a code.
3. When finished, select + **Add Selected Codes**



The Pick List is also available in the billing details screen in the Live Claims Feed.

1. Billing > Live Claims Feed

| | | | | |
|---|--|------------------------------|----------------------------------|---------------------------|
| Jenny (Jen) Harris – 04/22/2021 Primary Office [11] – Exam 1 | | View Service | + EOB | SuperBill |
| Billing Status | Balance Due <input type="text" value=""/> | | | |
| ICD Version | ICD-10 <input type="text" value=""/> | | | |
| Pt Payment | \$ 81 | Copay: \$20.00 | <input type="button" value="+"/> | |
| Payment Profile | Cash <input type="text" value=""/> | | | |
| Pt Payment Due | <input type="text" value=""/> | | | |
| Billing Profile | Select Profile <input type="text" value=""/> <input type="button" value="+"/> | | | |
| Billing Pick List | Choose from Pick List  | | | |
| Diagnosis Pick List | Choose from Pt Problems | | | |
| Payer pre-auth # | <input type="text" value=""/> | | | |
| Do Not Transmit | <input type="checkbox"/> Do not transmit authorization number to payer | | | |
| Referral # | <input type="text" value=""/> | | | |
| Billing Facility | <input type="text" value=""/> <input type="button" value="edit"/> | | | |
| Purchased Serv Provider | <input type="text" value=""/> <input type="button" value="edit"/> | | | |
| Appointment Notes | <input type="text" value=""/> | | | |
| Follow-up Date | <input type="text" value=""/> | | | |
| Billing Notes | <input type="text" value=""/> <input type="button" value="+"/> | | | |

