How do I Share Correspondence with the Billing Team?

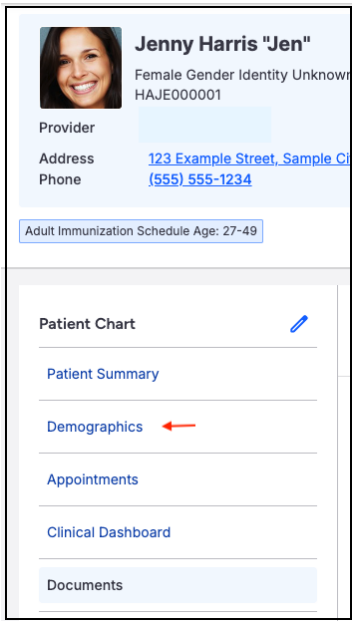
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As a client on a billing plan, there will be times when you need to share correspondence with the billing team. You can do it in different 2 ways: through the patient's chart or Box.com. Both are HIPAA-secure environments where PHI can be shared.

Patient's Chart

The paper correspondence received can be uploaded to the patient's chart, under their document section. You will need to scan the document and "drop" it into the patient's chart.

1. Access the patient's chart and select **Documents** from the menu on the left.



2. Once in the document section, you will see this screen. You can either press **Select Files to Upload** and select the file from your computer or drag and drop the scanned correspondence onto the page and select **Upload Files**.



3. Your document is now attached to the patient's chart and visible to the biller. Make sure to communicate with them to let them know the document is there and that action needs to be taken. They will not receive an alert that a document has been uploaded.

4. If the correspondence was received via your DrChrono fax, you can attach it to the patient's chart right from the message center. By pressing **Save Attachment to Patient Chart** within the fax window, you can attach it to the document section of the patient's chart. As with the method above, please make sure to communicate with your billing team/manager that a document has been saved to the patient's chart that needs action.

Box.com

You can also upload the correspondence image to the shared box.com folder. Within the larger box.com folder, you will see a couple of pre-populated sub-folders. Please place the correspondence within the "EOB" subfolder.

The billing team reviews the box.com folder each workday and will process any correspondence/EOBs that are uploaded to the folder. If there are any questions or if the document is unreadable, they will enter a note on the document alerting you to the question. Once the action requested by the correspondence is complete (sending notes/posting payment or denial/etc), they will be moved to a "Completed" folder within the EOB folder.

Documents will not be deleted from the box.com folder but will be moved to this completed sub-folder to keep things tidy and make it easy to see if additional documents need to be worked on.

