
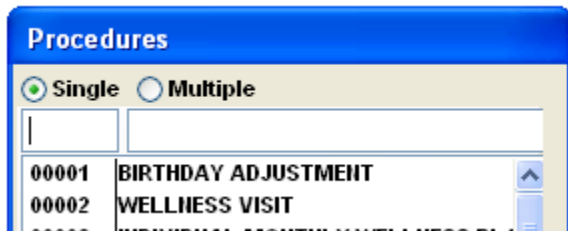


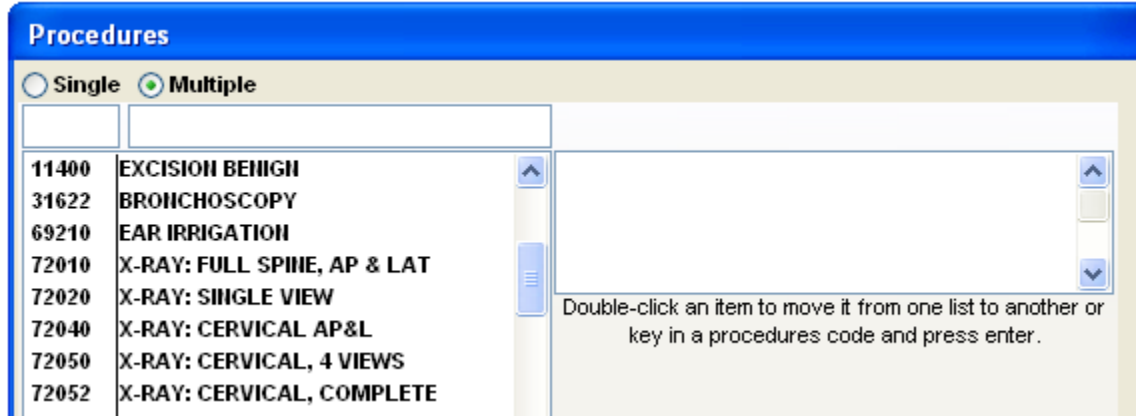
## ADDING A NEW TRANSACTION

Click on the Patient List icon , this opens up your list and allows access to a particular patient's record. Click the Transactions tab.

Select the New button. This brings up the Procedures & Fees list you have set in the software. There is an option for entering in single or multiple transactions. By default, the transaction picker screen will be set to single. When entering multiple transactions at the same time, click on the multiple radio button.



Key in the CPT code and press enter, or search through the list and double-click the code desired. If entering multiple, when done selecting all the transactions to add, press OK.



The charge will be added to the patient, that is, if you have taken the time to set your prices in the Procedure & Fees list prior to adding charges. Modify any information that is needed for this specific claim.

The screenshot displays a medical software interface for adding a transaction. The window title is "Patients (ERWIN E. BUFFALO) - Gender: M - Age: 21". The interface is divided into several sections:

- Top Navigation:** Includes tabs for "List", "Patient Detail", "Transactions" (active), "Insurance / Dates", "Plan", and "Custom".
- Transaction List:** A table showing a history of transactions:
 

Date	CPT	Carrier	Ins Balance	Pat Balance	Tot Bal	Insurance	Patient
10/03/2008	W (CONTRACT ADJUSTMENT)	BCBS OF MICHIGAN				\$-15.00	\$0.00
10/03/2008	PAYMENT	PATIENT				\$-40.00	\$-40.00
10/03/2008	CREDIT	PATIENT				\$-10.00	\$-10.00
10/03/2008	PAYMENT	BCBS OF MICHIGAN				\$-80.00	\$0.00
10/17/2008	72040 - X-RAY: CERVICAL AP&L	BCBS OF MICHIGAN	\$50.00		\$50.00	\$50.00	\$0.00
- Transaction Entry Form:**
  - Service:** 10/17/2008 to 10/17/2008
  - CPT:** 72040, Unit Price: \$50.00, Units: 1
  - Total:** \$50.00, Tax: \$0.00
  - Insurance:** Ins: \$50.00, Pat: \$0.00
  - Buttons:** 1, 2, I, H, C, M, P, A, PS, AA, AS, Dx (checkboxes 1-8), Mods
  - Claim Info:** Type of Claim: OTHER, Location, Auth No, POS: 11
  - Billing:** Exclude From Insurance Billing (checked), Visit (checked), Expiry Date, Dollars
  - Providers:** Primary: SARNO, LIS; Billing: SARNO, LIS; Supervising, Resident, Referring (fields)
- Totals:** \$40.00 Insurance, \$50.00 Patient, (\$10.00) Total
- Insurance Selection:** BCBS OF MICHIGAN selected. View options: All (selected), Billed, Payments, Credits.
- Buttons:** Repeat, Receipt, Payment, Reset, Notes, Links (Original, Rebill, Transfer)

## The Transaction Card

- The charge is assigned to an eligible primary carrier, or patient responsibility. The total charge is split between patient balance and insurance balance, based on whether or not you have used the automatic copay or deductible fields that are on the Insurance & dates screen.
- **Service dates**- the service date is created as today's date; you can amend the date by using the “drop down” arrows in the fields.
- **CPT** – the chosen code displays here. Again, you can amend this information by using the magnifying glass next to the field.
- **Unit price** – the default charge amount is pulled into the unit price amount, and units is set to "1". Changing the units on this screen will double, triple the charge you want to bill. There may be certain services that you would like to use this feature with, like massage or an inventory item.
- The information contained under the **2, H, C, M, P, and A** buttons, from the most recent transaction on the patient's card, will be copied into this new charge. More information on these buttons will follow later on in this section of the manual.
- **PS**- Purchased Services. This button reflects a consultation done by another provider in your office. This feature is rarely used.

- **AA and AS-** by default, Clinic Pro checks the Staff Doctor Detail screen and automatically applies a check mark, if you have previously Accepted Assignment with the insurance company. It is possible to Accept Assignment of benefits (**AA**) but not have the Assignment of Benefits Signature (**AS**) from the patient. In this circumstance, the patient would receive the benefits from the insurance company. The patient Detail card also mandates you check the AA and AS buttons.
- **Dx Codes-** The diagnosis are assigned to the transaction from the Patient Detail card. The Dx1 primary diagnosis checkbox will automatically be assigned. You can set the default diagnoses pointers to set for all the diagnoses from the System Parameters settings.
- **Mods-** You can assign up to three modifier codes per transaction by clicking on the magnifying glass and choosing the codes you wish to apply. You can also have them automatically transmit from the Procedures & Fees codes.
- **Type, Location, POS -** the claim type, location (if necessary), and Point Of Service code will be automatically assigned as you have previously entered this information into the software prior to entering charges for the patient.
- **Authorization -** the authorization number will automatically fill in if defined on the Insurance & Dates screen
- **Exclude from Insurance Billing-** use this feature when you want to hold a specific transaction from billing out. Simply place a check mark in the box, remove check mark when you are ready to generate the line of service.
- **Visits -** the visit checkbox will automatically be marked.
- **Primary-** the primary doctor will automatically fill in from the Patient Detail Card.
- **Billing –** the billing doctor will automatically fill in from the Patient Detail Card.
- **Referring-** the referring doctor will automatically fill in from the patient Detail Card.
- **Ordering, Resident, Supervising - you** would have filled these providers in on the Referring Doctor list.
- **Views -**The view section of the transaction card allows a Clinic Pro user to customize the display. Most of the time, the user would want the display set to "All". This will display all of the transactions, the payments, and the write offs.  
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  - All - Any and all transaction entries
  - Billed - Will show only transactions which have been billed. Payments and Unbilled transactions are hidden.
  - Payments - Will show only payments. This does not include zero dollar payments which write off balances.
  - Credits - Will show only open patient credits.