



Practice Fusion

Billing Guide



Billing Interface Setup

How to connect your billing account with your EHR

Step 1: Select "Billing" from the dashboard of the EHR

The screenshot shows the Practice Fusion dashboard for Robin Beadle at Robin Beadle Practice. The dashboard is titled "Practice dashboard" and has a "PRACTICE SETUP" progress bar at 20%. The dashboard is organized into a grid of task cards. A red arrow points from the "Online profile" card to the "Billing" card, which is highlighted with a red border.

Navigation: Dashboard | Documents | Directory | Billing

Task Cards:

- e-Prescribing** (Incomplete): e-Prescribing setup is incomplete. Enter your Medical Credentials. Video tutorial. [Enter medical license](#)
- Labs** (Incomplete): Send orders and receive results in your EHR. Video tutorial. [Connect your labs](#)
- Imaging centers** (Incomplete): Images and reports viewed in your EHR. Video tutorial. [Connect imaging centers](#)
- Import patients** (Incomplete): 1 patient records. Import more patients. Video tutorial. [Import patient data](#)
- Online profile** (Incomplete): Set up your online profile and booking page on Patient Fusion. [Set up an online profile](#)
- Refer-a-Doc**: Spread the word, share Practice Fusion with your colleagues.
- Tutorials**: Get to know your EHR with our video tutorials.
- Template community**: Find, rate, and share charting templates with the community.
- Your practice** (Complete): Robin Beadle Practice, 650 Townsend, 5th Floor, San Francisco, CA 94107.
- EHR users** (Complete): 1 users in your practice. Add more users.
- Billing** (Complete): Superbill tutorial complete. Video tutorial.
- Direct messaging** (Complete): Your direct address is rbeadle@direct.practicefusion.com. [View your Messaging inbox](#)

Step 2: Billing Dashboard

1. Select “Existing Billing System” to begin the process of connecting your billing system to Practice Fusion
 - From this screen your customers can also learn how to create Superbills

The screenshot shows the Practice Fusion Billing Dashboard. The top navigation bar includes 'Dashboard', 'Documents', 'Directory', and 'Billing' (selected). The main content area is titled 'Billing dashboard' and features three cards:

- Superbill**: Includes a 'COMPLETE' badge and text: 'Learn how to create superbills from patient encounters. Explore superbills'.
- Existing billing system**: Highlighted with a red box and a red arrow. Text: 'Already have a billing system? See if Practice Fusion is connected to your billing system'.
- New billing system**: Text: 'Want a billing system that is integrated with Practice Fusion? Check out our integrated billing partners'.

Step 3: Choose Billing Solution

1. Select EZClaim from the list of preferred billing partners
2. Enter the required fields then click submit.

The screenshot displays the 'Billing Solutions' configuration page in the Practice Fusion interface. The left sidebar contains navigation options: Home, Schedule, Tasks, Charts, Messages, and Reports. The main content area is titled 'Billing Solutions' and features a section 'Choose your billing solution' with the instruction 'Choose your billing solution to start sending superbills directly from Practice Fusion.' Below this, a list of billing partners is shown, with 'EZClaim' selected. The right-hand panel, titled 'Add account information', provides a form for entering details for the selected provider. The form includes a text input for 'PRACTICE FUSION PRACTICE ID', a dropdown for 'PROVIDER NAME' (with 'Select a provider' selected), a text input for 'PHYSICIAN DISPLAY NAME', a dropdown for 'FACILITY' (with 'Select a facility' selected), and a text input for 'FACILITY DISPLAY NAME'. A 'Submit' button is positioned at the bottom right of the form. The top navigation bar shows 'Settings', 'Connect', 'Help', 'Robin Beadle | Robin Beadle Practice', 'Settings', 'Log out', and 'Lock'.

*Help Tip – How to Add New Users In Your Account

1) Select Settings → 2) Users

The screenshot shows the 'EHR Settings' page. The top navigation bar includes 'Settings', 'Connect', 'Billing solutions', 'Payer list', and 'Add users'. The 'Settings' tab is circled in red with an arrow labeled '1'. The left sidebar contains various settings categories, with 'Users' circled in red and an arrow labeled '2' pointing to it.

→ 3) Add User Information

The screenshot shows the 'Add users' page. The 'Add user' form is circled in red with an arrow labeled '3'. The form includes fields for 'First name', 'Last name', 'Login email', and 'Role'. Below the form, a table shows the user 'Robin Beadle' with email 'rbeadle@practicefusion.com' and role 'Phys/MD/DO'.

NAME	EMAIL	ROLE	PERMISSION / USER STATUS
Robin Beadle	rbeadle@practicefusion.com	Phys/MD/DO	Admin Active user

Step 4: Confirmation

- ✓ You will receive two emails from Practice Fusion after requesting your integration connection.
 - First email will confirm that your request was received
 - Second email will confirm whether your request was approved and completed or denied.

Practice Fusion aims to complete your integration process within 5-7 business days.

Creating & submitting a superbill

Step 1: Create and complete a “Chart Note” for a patient visit

1) Under “Charts” select your patient

The screenshot shows the EHR interface with a list of 4 recent patients. The list includes columns for FIRST, LAST, DOB, CONTACT INFO, and ACCESSED. The patients listed are Peter Pan, Nova, Burayon, and George Jungle. A red circle highlights the 'Charts' icon in the left sidebar, and a red arrow points from it to the patient list. A red number '1' is placed below the arrow.

FIRST	LAST	DOB	CONTACT INFO	ACCESSED
Peter	Pan	Jun 06, 1984 Male	No address recorded	2:47 PM 01/22/15
Nova	Nova	Dec 12, 1984 Female	No address recorded	2:43 PM 01/22/15
Burayon	Burayon	Jan 20, 1984 Male	No address recorded	2:39 PM 01/22/15
George	Jungle	Jan 07, 1966 Male	650 Townsend, San Francisco, CA 94107 M (555) 555-5555	5:24 PM 01/21/15

2) Select the type of new encounter

The screenshot shows the EHR interface for patient George Jungle. The 'New encounter (SOAP)' dropdown menu is highlighted with a red circle, and a red arrow points to it. A red number '2' is placed below the arrow.

George Jungle 49 yrs M 01/07/1966 george.jungle@practicefusion.com

Diagnoses: Chronic diagnoses, Acute diagnoses, Social history, Smoking status, Past medical history, Advanced directives

Allergies: Drug allergies, Food allergies, Environmental allergies, Medications

Encounters: 01/21/2015 Office Visit (SOAP Note), 01/21/2015 Office Visit (SOAP Note)

Messages: No messages for this patient

Step 1: Create and complete a “Chart Note” for a patient visit

Complete a chart note for a patient visit.

1. Ensure the “**Seen By**” field reflects the correct provider, as this information will be passed through to [Company Name].
2. Once the chart note is complete, **sign** the chart note. (note: **signing** the chart will lock this patient chart for future edits)

The screenshot displays the 'Encounter details' section of a medical software interface. The patient's name is George Jungle, 49 years old, born 01/07/1966. The encounter type is 'Office Visit', the note type is 'SOAP Note', and the date is 1/21/2015. The 'SEEN BY' field is set to 'Robin Beadle', and the 'FACILITY' is 'Robin Beadle Prac...'. The 'STATUS' is 'Unsigned'. A red circle and arrow labeled '1' point to the 'SEEN BY' dropdown menu. A red circle and arrow labeled '2' point to the 'Sign' button. The 'Chief complaint' section shows 'No chief complaint recorded.' The 'Vitals' section shows: HEIGHT 70 in, WEIGHT 195 lb, BMI 27.98, BP 130 / 78, TEMP 98 °F, PULSE 70, RR 12, O2 SAT RA, PAIN 0 - No pain. The 'Diagnoses' section shows 'Chronic' and 'Acute' categories, with '(250.00) Diabetes mellitus' listed under 'Acute'.

Step 2: Create superbill

Once the chart note is complete you can add your superbill in two ways:

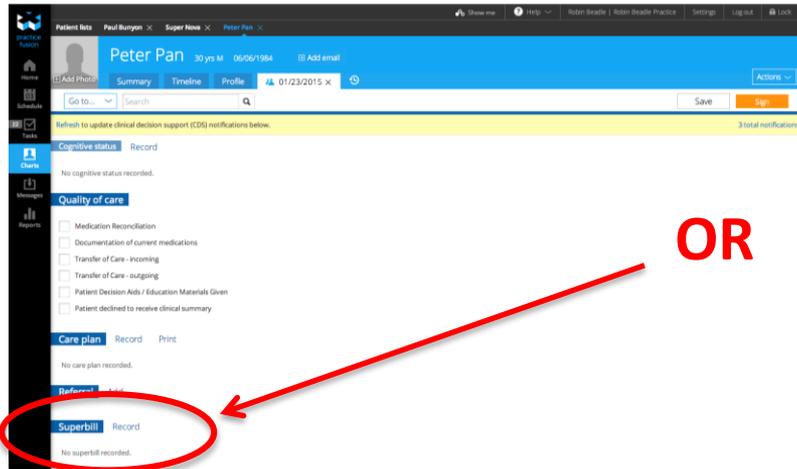
1. By selecting **“Superbill Record”** at the bottom of the chart note

OR

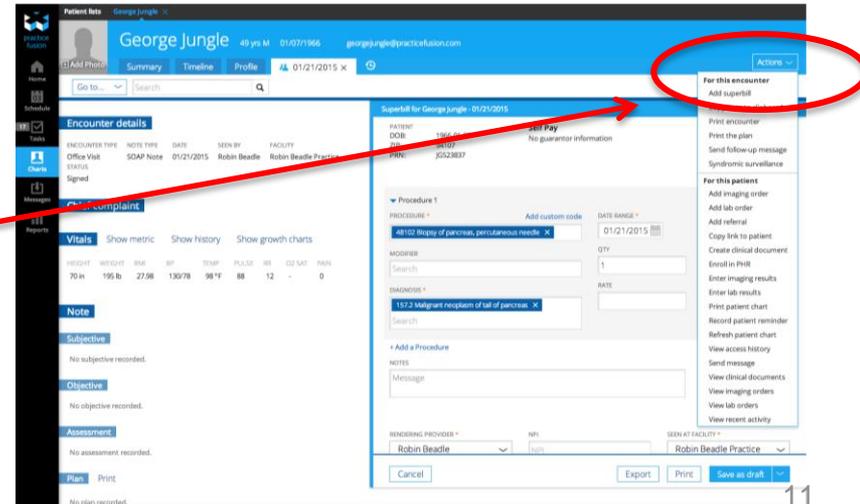
2. By selecting the **“Actions”** dropdown menu you can **“Add superbill”** from the chart note

(Note: the chart note does not have to be signed in order to create or send a superbill, however it is recommended)

Under the **“Actions”**
dropdown



OR



At the end of the chart note

Step 2: Create superbill

1. Fill in necessary information
2. Ensure that the “**Rendering Provider**” and “**Seen At Facility**” fields reflect the correct provider & facility where services were rendered.
3. Mark the superbill as “Save as draft”, “Ready for biller” or “Archive” by using the drop down button at the bottom of your screen. “**Ready for biller**” will send the superbill to your billing system.

The screenshot displays a patient record for Peter Pan (DOB: 06/06/1984) with an encounter on 01/23/2015. The superbill form includes the following details:

- Patient:** Peter Pan, DOB: 1984-06-06, ZIP: PP272817
- Procedure 1:** 95017 Allergy testing, any combination of percutaneous b... (Date Range: 01/23/2015)
- Diagnosis:** 373.32 Contact and allergic dermatitis of eyelid
- Rendering Provider:** Robin Beadle
- Seen At Facility:** Robin Beadle Practice
- Save as draft:** (Dropdown menu)

Step 3: Finding submitted superbills

1) Superbills will appear under the “Billing Reports”

The screenshot shows the 'Reports' menu on the left side of the software interface. The 'Billing report' option is circled in red, and a red arrow points to it from the 'Billing report' section of the adjacent slide. A red number '1' is placed next to the 'Referrals report' option.

- 2014 Clinical Quality Measure report
- 2014 Meaningful Use dashboard
- Activity feed and audit report
- Billing report**
- Chart notes report
- Diagnosis report
- Drug interactions report
- e-Prescription report
- Referrals report
- Meaningful Use dashboard - Historic
- Medication report
- Patient lists
- Population health management

Superbill Status:

- **Draft** - Superbill is not final or not ready to be sent to biller/billing system
- **Ready for biller** - Superbill is ready and will be sent to biller/billing system.
- **Archived** - Superbill has been sent to biller/billing system and claim is being processed.

The screenshot shows the 'Billing report' table in the software interface. The table has columns for BILL ID, PATIENT, VISIT DATE, BILLING PROVIDER, LOCATION, STATUS, and BILL DATE. Three rows are visible, all with a status of 'Ready for biller'. A red arrow points from the 'Ready for biller' status in the first row to the 'Ready for biller' status in the second row.

BILL ID	PATIENT	VISIT DATE	BILLING PROVIDER	LOCATION	STATUS	BILL DATE
05-751-8M4879P-68	Super Nova 30 y. F. DOB 12/12/1984	01/22/2015	Robin Beadle	Robin Beadle Practice	Ready for biller	01/22/2015
05-751-5BYY64-11	Paul Bunson 31 y. M. DOB 01/20/1984	01/22/2015	Robin Beadle	Robin Beadle Practice	Ready for biller	01/22/2015
05-750-AAQMN-87	George Jungie 49 y. M. DOB 01/07/1966	01/21/2015	Robin Beadle	Robin Beadle Practice	Ready for biller	01/21/2015

*Help Tip: Successful superbills

- **Archive** - Successful superbills (picked up by your billing system) will be filed under Archive.
- **Error** – Unsuccessful superbills will be under **Error** and will potentially require a fix.

practice fusion

Home

Schedule

23 Tasks

Charts

Messages

Reports

Reports Billing report

0 errors

Ready for biller (3 / 3) Search 12/22/2014 to 01/22/2015 Run report Integrate billing

PATIENT	VISIT DATE	RENDERING PROVIDER	LOCATION	STATUS	BILL DATE
Super Nova 0 y, F, DOB 12/12/1984	01/22/2015	Robin Beadle	Robin Beadle Practice	Ready for biller	01/22/2015
05-751-SBYY64J-11 Paul Buryon 31 y, M, DOB 01/20/1984	01/22/2015	Robin Beadle	Robin Beadle Practice	Ready for biller	01/22/2015
05-750-A4Q4MNN-B7 George Jungle 4 y, M, DOB 01/07/1966	01/21/2015	Robin Beadle	Robin Beadle Practice	Ready for biller	01/21/2015