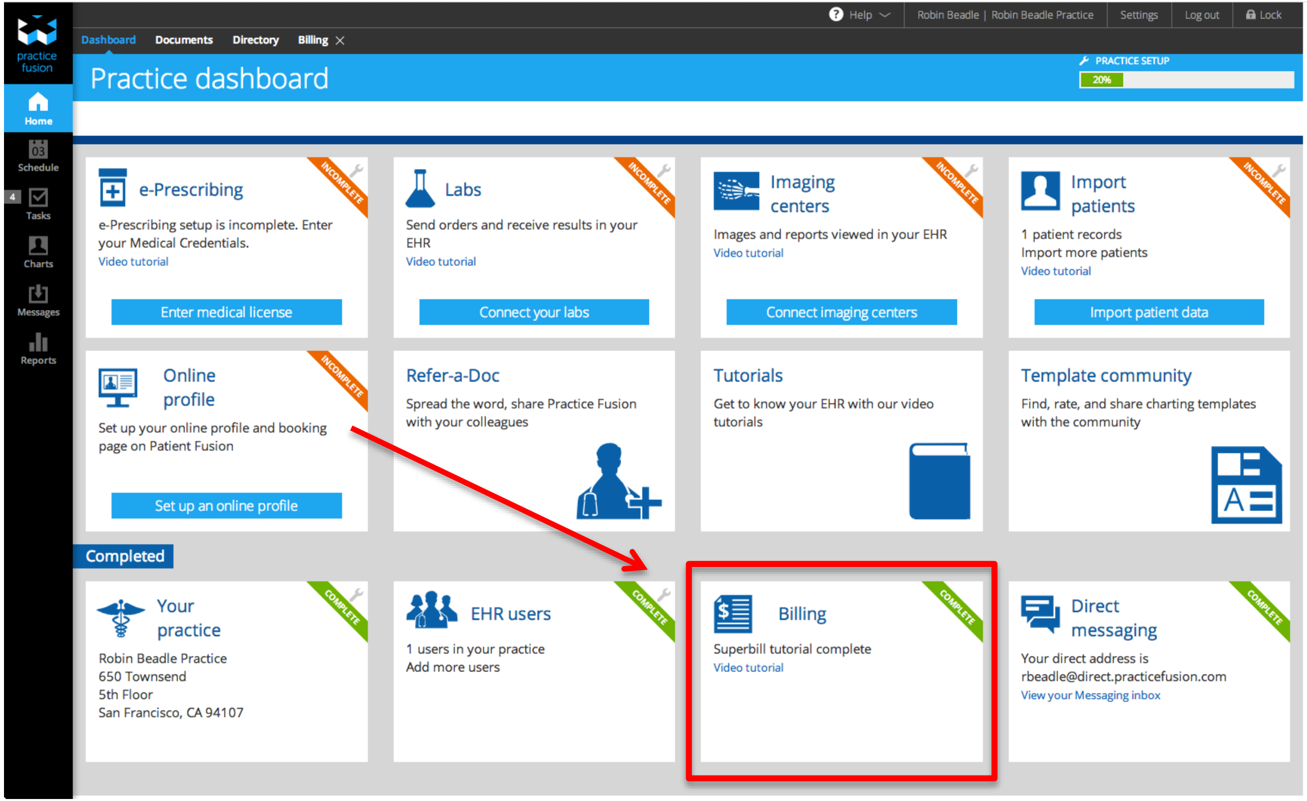
Practice Fusion

Billing Guide

Billing Interface Setup

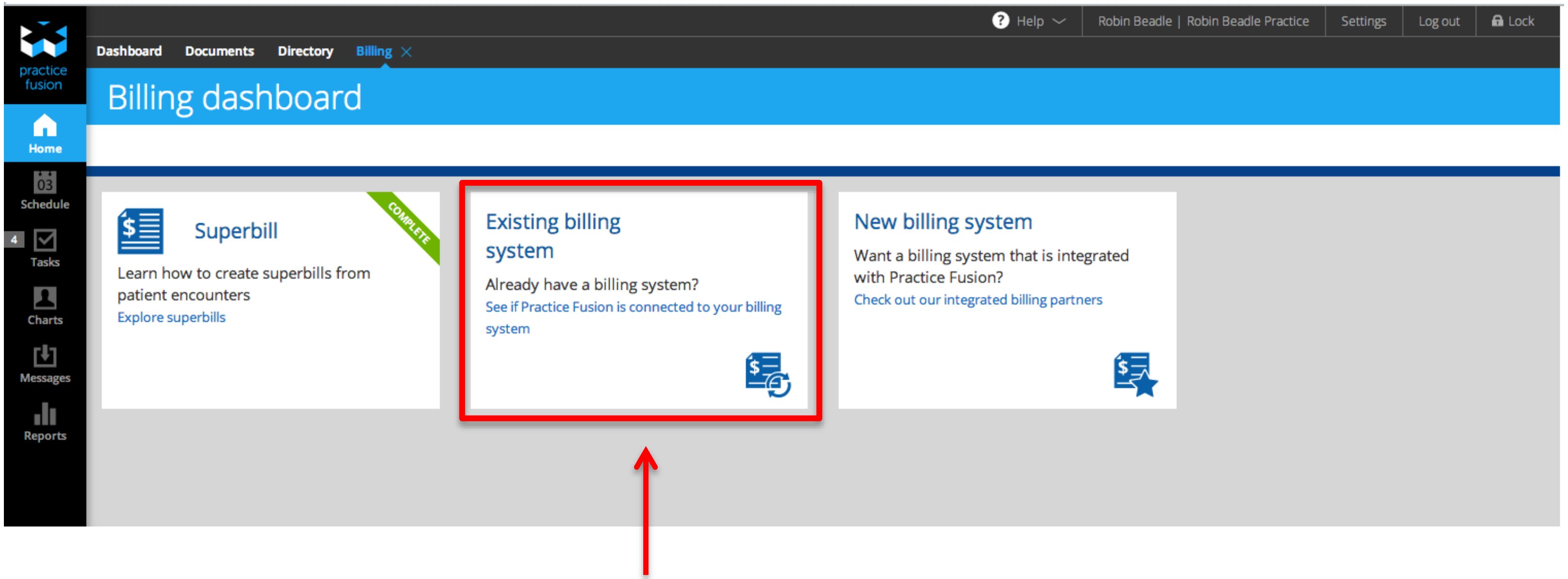
How to connect your billing account with your EHR

Step 1: Select “Billing” from the dashboard of the EHR



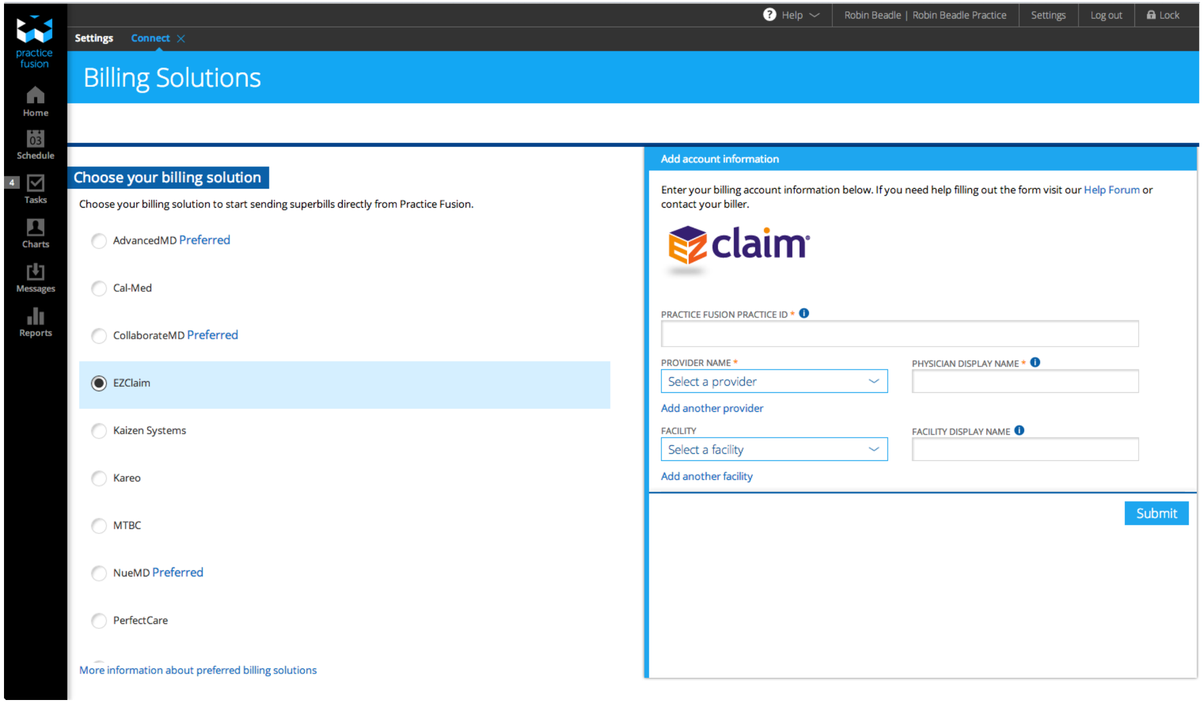
Step 2: Billing Dashboard

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



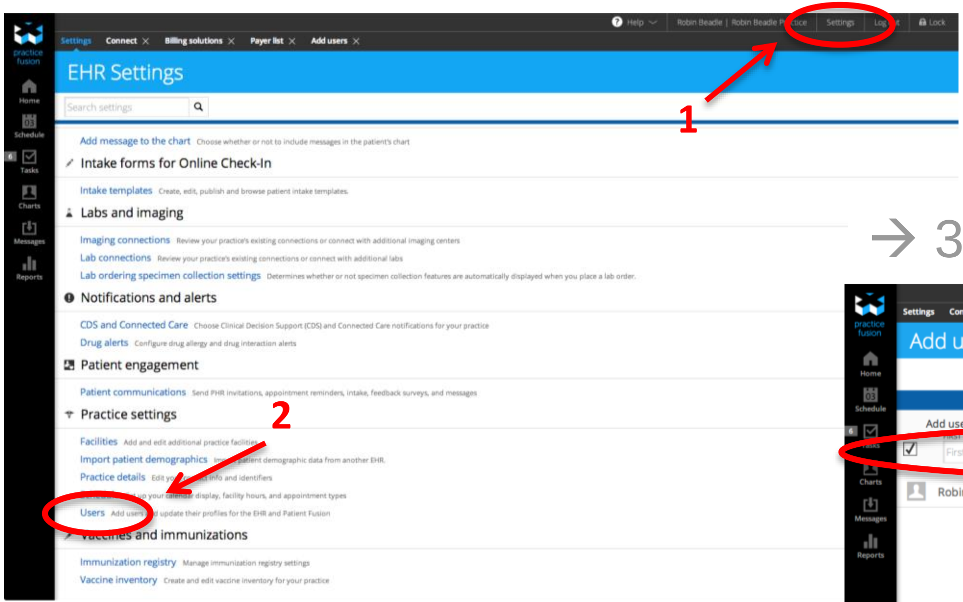
Step 3: Choose Billing Solution

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

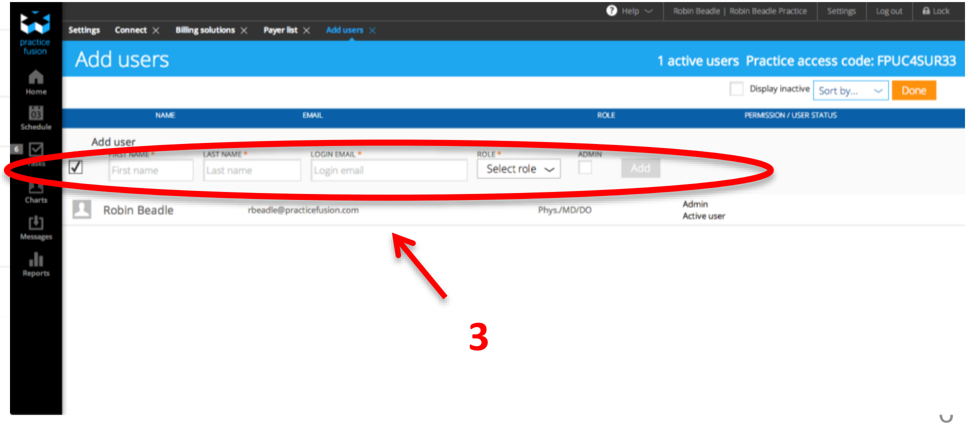


*Help Tip – How to Add New Users In Your Account

1) Select Settings → 2) Users



→ 3) Add User Information



Step 4: Confirmation

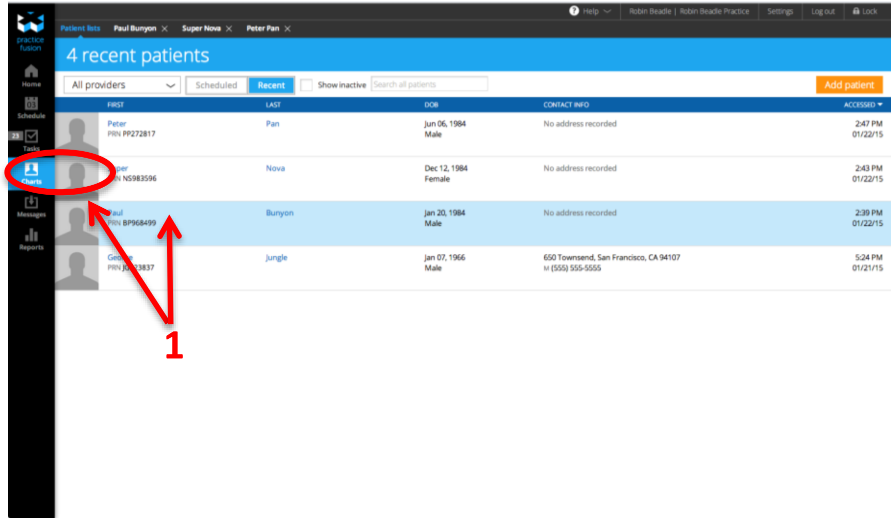
- ✓ You will receive two emails from Practice Fusion after requesting your integration connection.
  - First email will confirm that your request was received
  - Second email will confirm whether your request was approved and completed or denied.

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

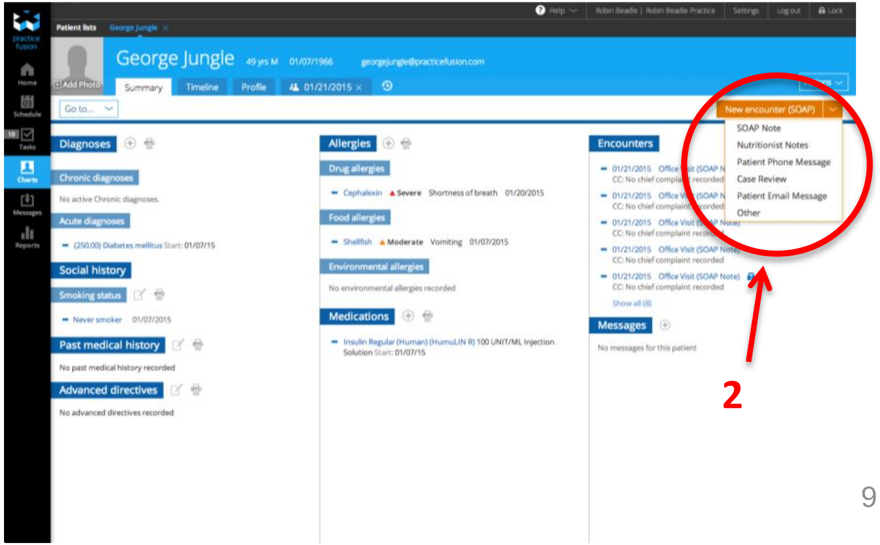
Creating & submitting a superbill

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

1) Under “Charts” select your patient



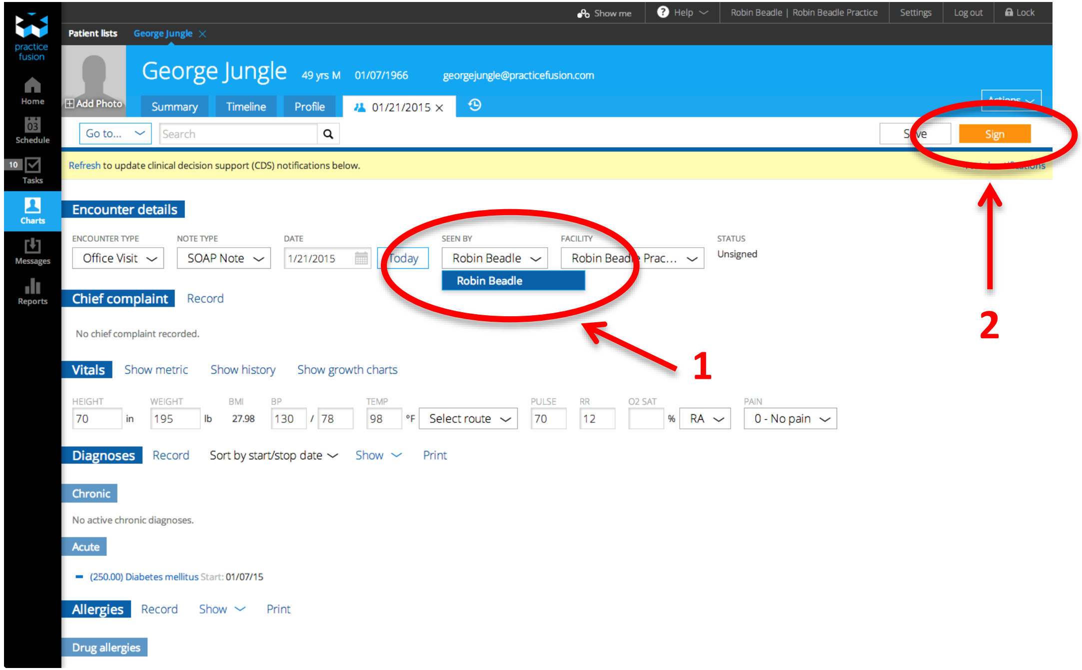
2) Select the type of new encounter



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)



Step 2: Create superbill

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

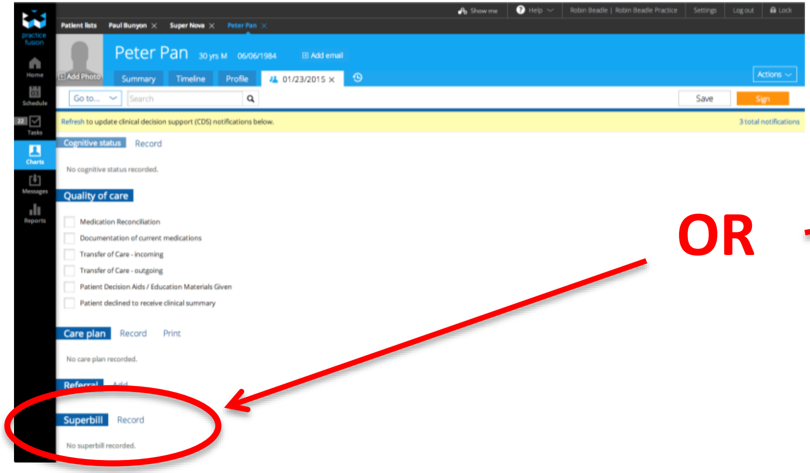
1. By selecting **“Superbill Record”** at the bottom of the chart note

   OR

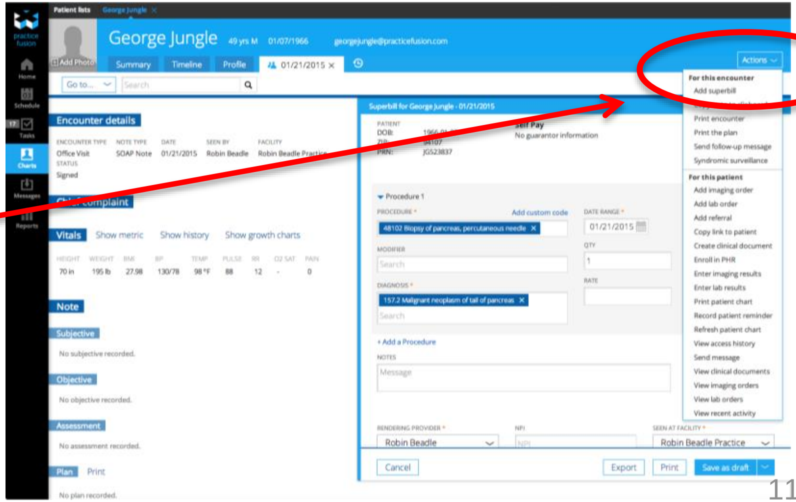
2. By selecting the **“Actions”** dropdown menu you can **“Add superbill”** from the chart note

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

Under the “Actions” dropdown



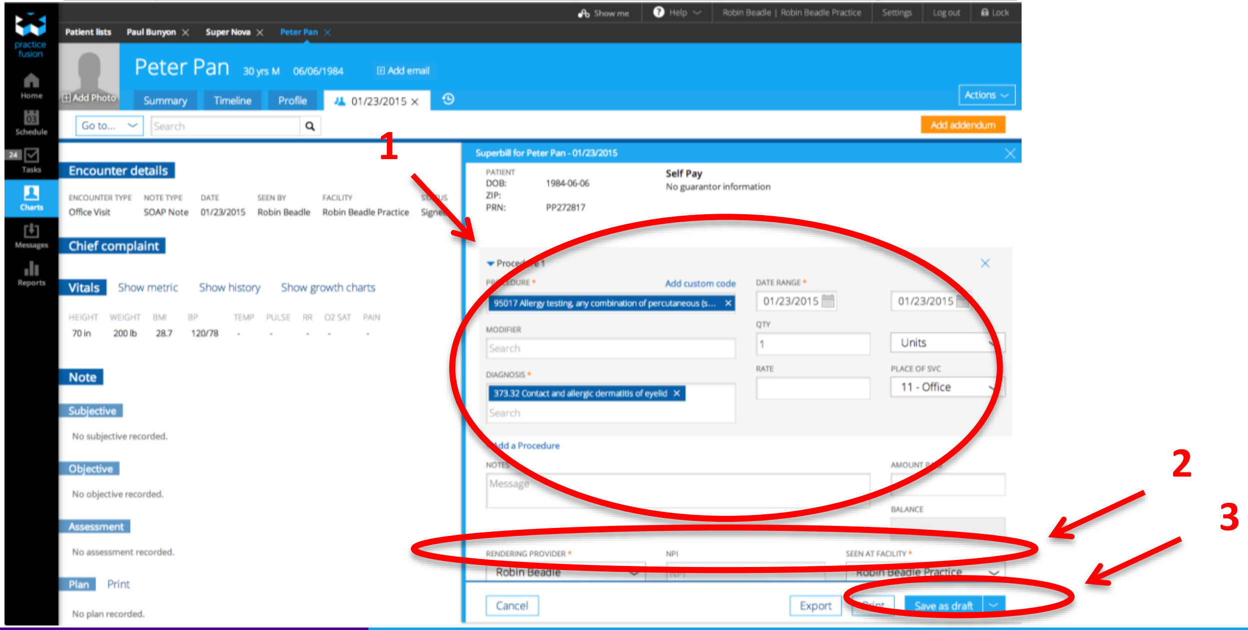
OR



At the end of the chart note

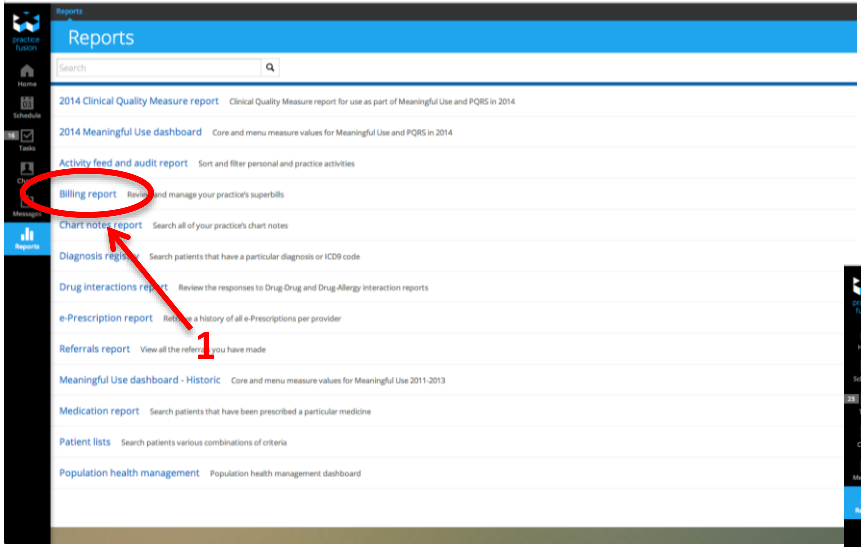
Step 2: Create superbill

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 "<u>Save as draft</u>", "<u>Ready for biller</u>" or "<u>Archive</u>" by using the drop down button at the bottom of your screen. **<u>"Ready for biller" will send the superbill to your billing system.</u>**



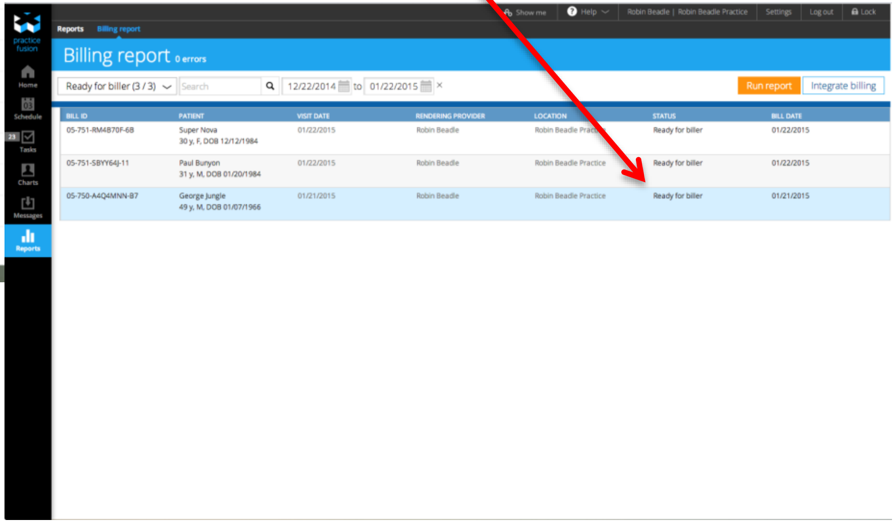
Step 3: Finding submitted superbills

1) Superbills will appear under the “Billing Reports”



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.



*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.