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 does not have to be signed in order to create or send a superbill, however it is recommended)
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.
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.