

How to complete Records Requests & Invoices

CS Records Statement

Scan in and email to Jenny

Client Name:		Date of Birth:	
Therapist:		Office Location:	
	Item	Charges	
	Retrieving/copying records	\$17.96	
	___ # of Pages Copied x \$1.35		
	Total Charge:		

Instructions

Therapist:

- Save a Copy of Records as a PDF from Documentation tab in CS
- Complete INVOICE, if needed (for Social Security, enter amount on the invoice on the coversheet) Note: we cannot charge for Soc Security APPEALS.
- Scan the CS Record Statement and email it to Jenny
- EFAQ the records to the requestor

Jenny:

- Enter in CS
 - Visit Tab
 - Enter new visit
 - Select "REC COPY / CHARGE FOR RECORDS COPIES" from CPT list
 - Enter 1 unit, 0 min
 - Billing Tab
 - Create new invoice
 - Select PATIENT as Responsible
 - Enter Total Charge amount (from above) into Rate/Unit box
 - Click on box to apply visit to the invoice
 - Save