

How to complete Records Requests & Invoices

Therapist:

- Save a Copy of Records as a PDF from Documentation tab in CS
- Complete the Invoice for Record Copies, if needed (for Social Security, enter amount on the invoice on the coversheet provided by Social Security) Note: we cannot charge for Soc Security APPEALS.
- Scan the Invoice for Record Copies 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