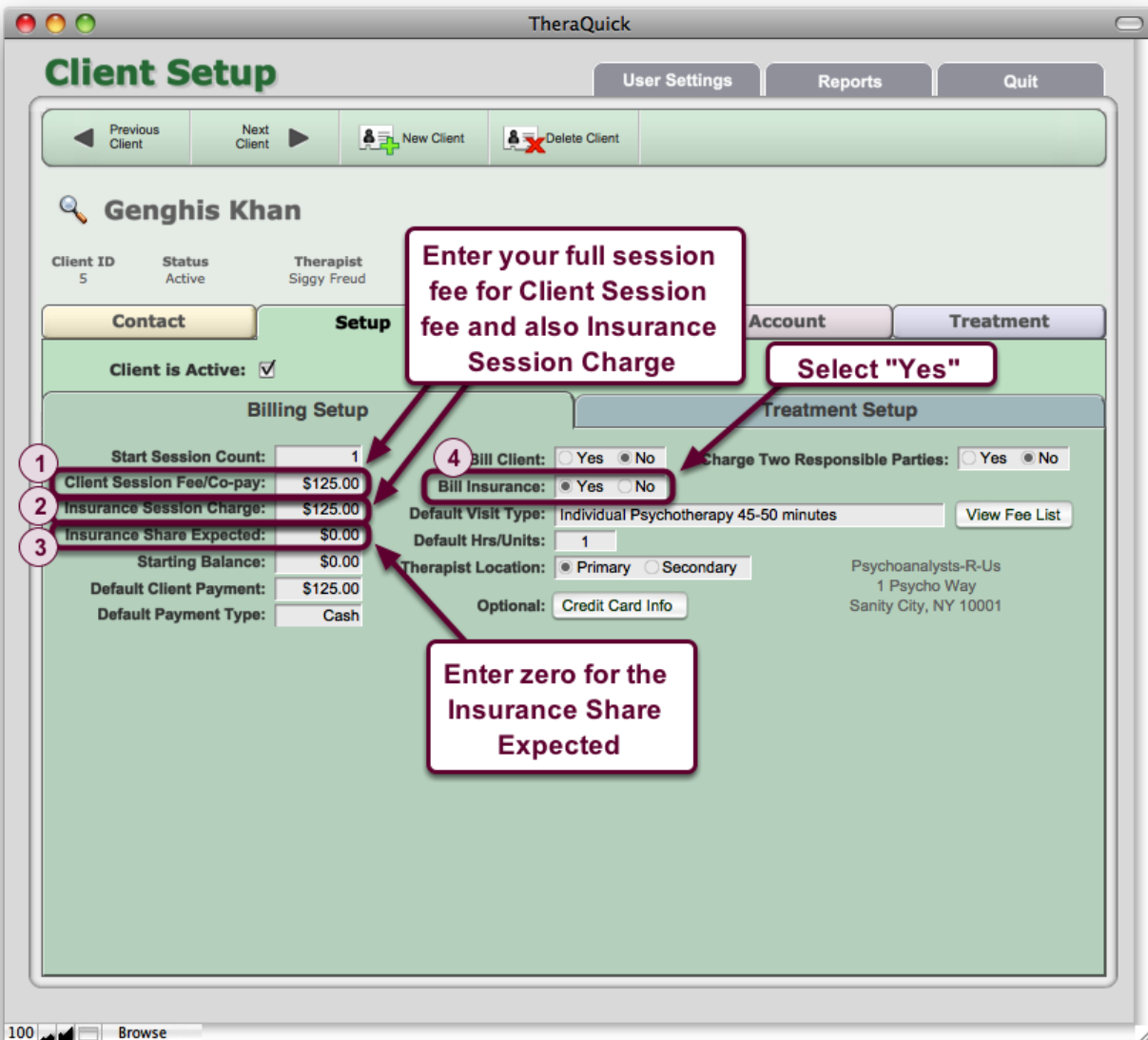


Setting Up a Client for Insurance Reimbursement (Superbilling)

How to setup the billing information for a client who pays you in full for the sessions, then seeks reimbursement from his insurance company via a Superbill.

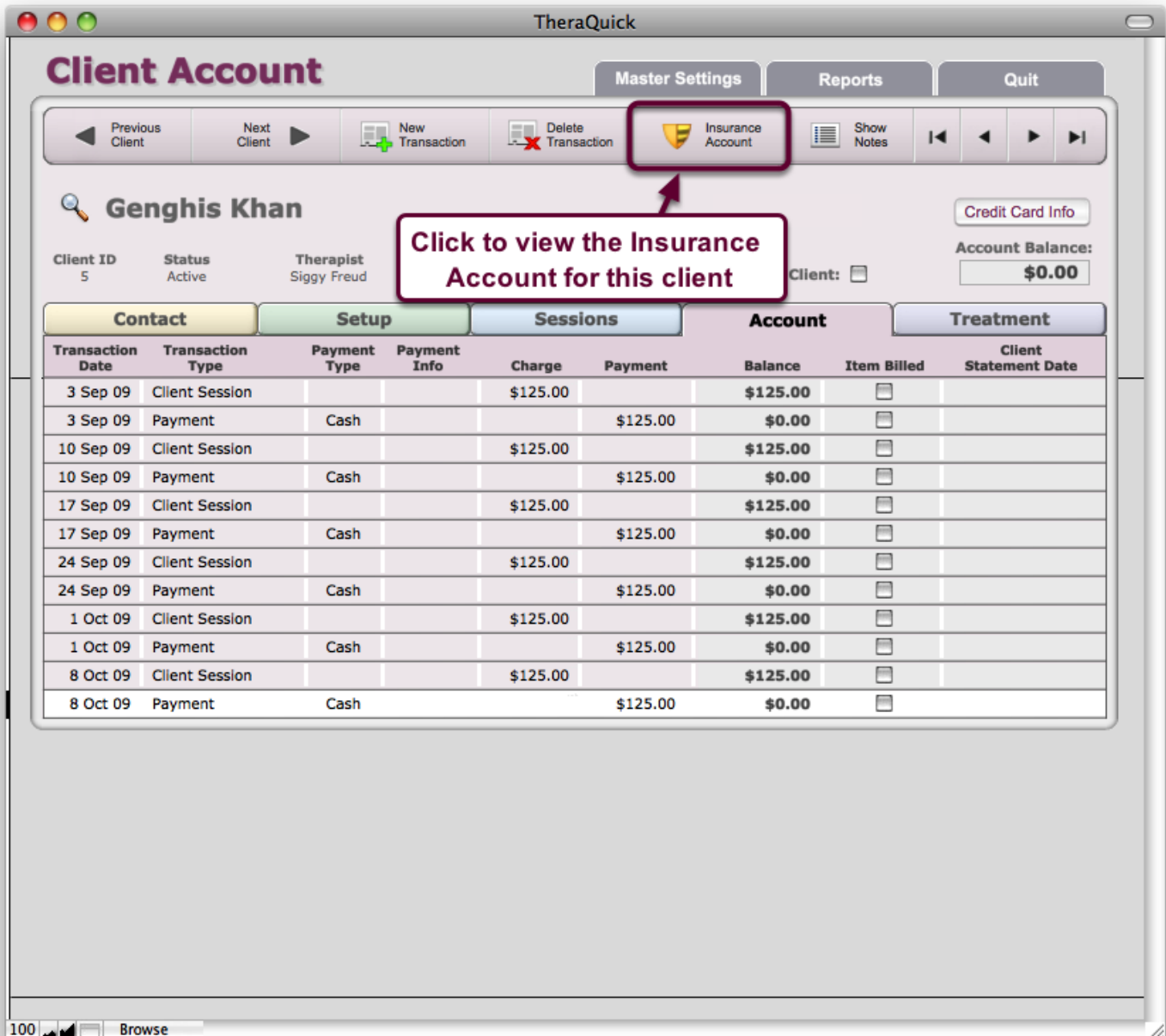
Navigate to the Client Setup > Billing Setup layout for the desired client.



(1) Enter your full fee in the Client Session Fee/Co-pay field, and (2) enter the full fee in the Insurance Session Charge field. Since you are not directly billing the insurance company and expecting payment for yourself, (3) enter zero in the Insurance Share Expected field. (4) Select "Yes" for Bill Insurance to include this client when performing batch insurance billing. Note

that you do not need to enter the client's insurance policy information if you are preparing a Superbill. Be sure that you have entered a diagnosis under the Treatment Setup tab.

Navigate to the client's Account layout, then click on the Insurance Account toolbar button to view the client's Insurance Account.



The "Insurance Account" toolbar button lets you toggle between the client's account and the insurance account. It changes to "Client Account" when you are viewing the insurance account.

Review the insurance account and the dates for the transactions to be included in the Superbill.

Client's Insurance Account is being viewed

Insurance Account

Master Settings | Reports | Quit

Previous Client | Next Client | New Transaction | Delete Transaction | Client Account | Show Notes

Genghis Khan Re-create Insurance Charges

Client ID: 5 | Status: Active | Therapist: Siggy Freud | Insurance Balance: \$0.00 | Bill Insurance:

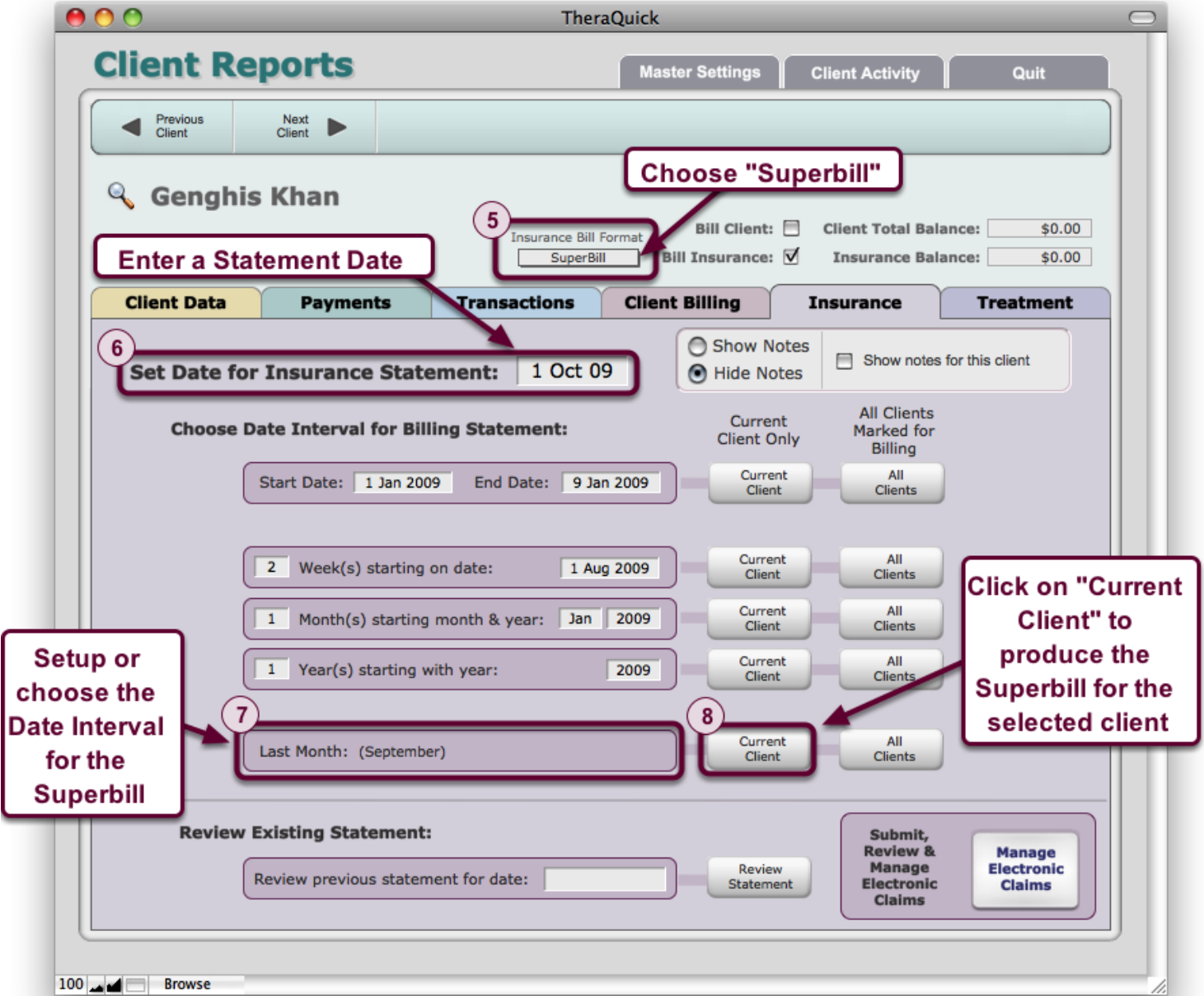
Contact | Setup | Sessions | **Insurance** | Treatment

Transaction Date	CPT Code	Transaction Description	Check #	Total Charge	Insurance Share	Insurance Payment	Insurance Billed	Statement Date
3 Sep 09	90801	Diagnostic Interview Exam		\$125.00	\$0.00		<input type="checkbox"/>	
10 Sep 09	90806	Individual Psychotherapy 45-50 minutes		\$125.00	\$0.00		<input type="checkbox"/>	
17 Sep 09	90806	Individual Psychotherapy 45-50 minutes		\$125.00	\$0.00		<input type="checkbox"/>	
24 Sep 09	90806	Individual Psychotherapy 45-50 minutes		\$125.00	\$0.00		<input type="checkbox"/>	
1 Oct 09	90806	Individual Psychotherapy 45-50 minutes		\$125.00	\$0.00		<input type="checkbox"/>	
8 Oct 09	90806	Individual Psychotherapy 45-50 minutes		\$125.00	\$0.00		<input type="checkbox"/>	

None of these transactions have been included in a billing statement yet

The full session charge will be entered in the Total Charge column, with zero in the Insurance Share column for a client who is paying in full for sessions. A checkmark will appear for transactions that have already been billed. None have been billed yet in this example. Review the dates for the transactions to be included in the Superbill. We will prepare a Superbill for the September transactions in this example.

Navigate to the Reports section, and choose the Insurance tab.



(5) Be sure that "Superbill" is selected as the Insurance Bill Format. (6) Enter the statement date for the Superbill. (7) Choose the date interval that includes the desired transactions (last month, or September in this example). (8) Click on "Current Client" to prepare the insurance statement only for the selected client, or click on "All Clients" to perform batch billing for all clients marked for insurance billing.

Review the Superbill

Insurance Statement

For professional services of:
Sigmund Freud PhD
 Psychoanalyst PSX9999
 Tax ID: 11-222333
 Shrink-N-Think Analysis
 99 Comfy Couch Court
 Shrinkville, NY 10000
 866-111-2222

Insurance Claim Statement

Statement Date: 1 February 2009

Client: **Khan, Genghis W.**
5 Mongol Court
Mongol Empire, Mongolia
 DOB: **11/11/1206**

Diagnoses: 312.34

Period of Services: 1 Sep 2009 to 30 Sep 2009

Place of Service: Office

Date	Description	Hrs/Units	Fee
3 Sep 09	90801 Diagnostic Interview Exam	1	\$125.00
10 Sep 09	90806 Individual Psychotherapy 45-50 minutes	1	\$125.00
17 Sep 09	90806 Individual Psychotherapy 45-50 minutes	1	\$125.00
24 Sep 09	90806 Individual Psychotherapy 45-50 minutes	1	\$125.00

Provider Signature: _____
 Provider ID/NPI: 1012223333

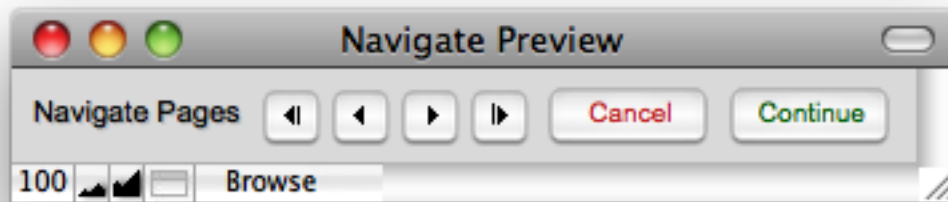
Total Fees: \$500.00

Page 1 of 1

100 Preview

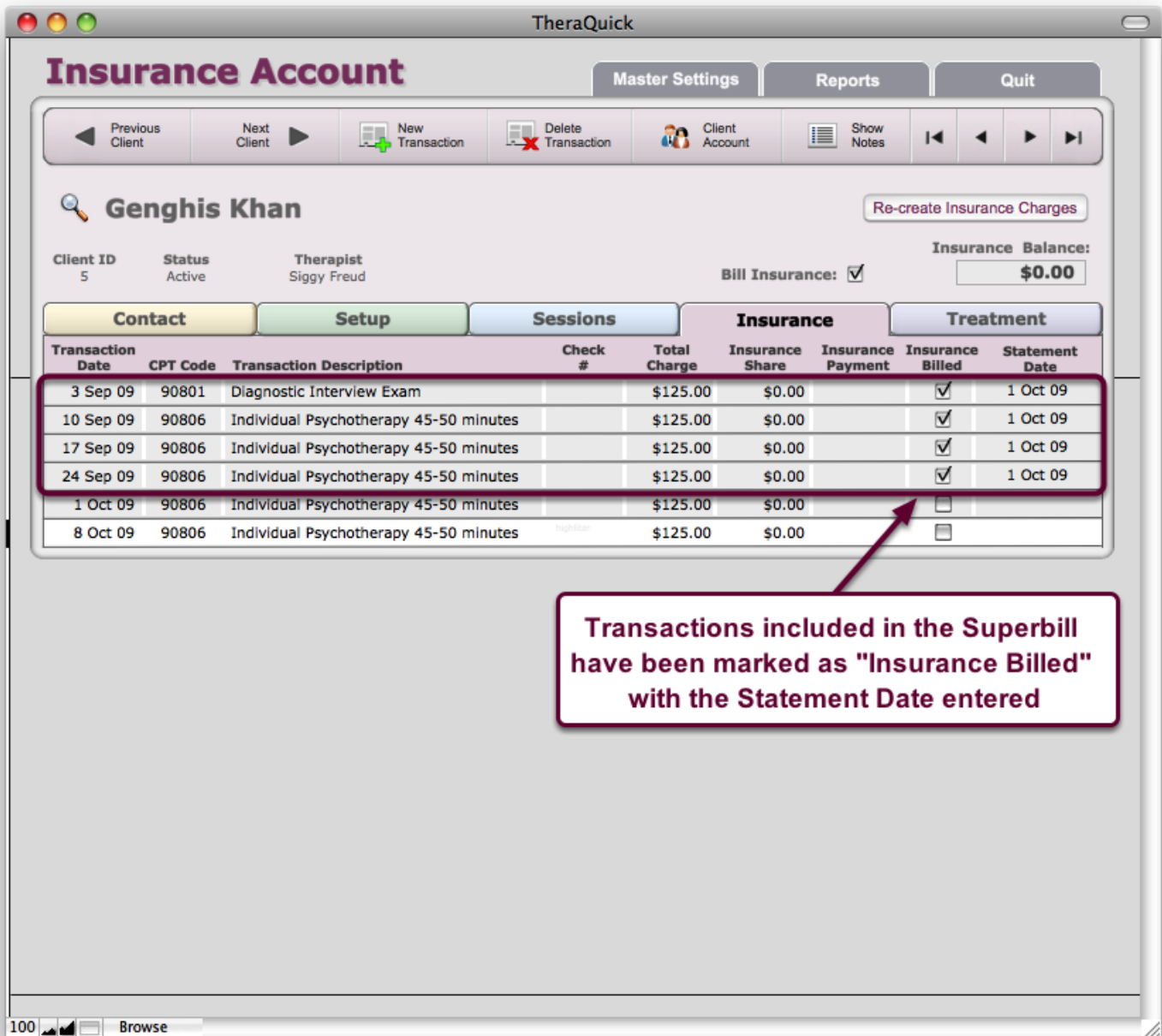
TheraQuick presents you with a preview of the Superbill as it would look when printed.

Navigate through the pages, or continue to the next step using the Navigate Preview window.



The Navigate Preview window (which appears over the report window) allows you to navigate through the pages of the report, if there is more than one page. Click "Continue" to proceed with saving and/or printing the report. You will have the option to save it as a PDF, and then to print the report. After either saving or printing the Superbill, TheraQuick will mark the transactions as "Insurance Billed."

Optional: Return to the client's insurance account to see the updated information.



Insurance Account

Client: **Genghis Khan**

Client ID: 5 | Status: Active | Therapist: Siggie Freud

Insurance Balance: \$0.00

Bill Insurance:

Transaction Date	CPT Code	Transaction Description	Check #	Total Charge	Insurance Share	Insurance Payment	Insurance Billed	Statement Date
3 Sep 09	90801	Diagnostic Interview Exam		\$125.00	\$0.00		<input checked="" type="checkbox"/>	1 Oct 09
10 Sep 09	90806	Individual Psychotherapy 45-50 minutes		\$125.00	\$0.00		<input checked="" type="checkbox"/>	1 Oct 09
17 Sep 09	90806	Individual Psychotherapy 45-50 minutes		\$125.00	\$0.00		<input checked="" type="checkbox"/>	1 Oct 09
24 Sep 09	90806	Individual Psychotherapy 45-50 minutes		\$125.00	\$0.00		<input checked="" type="checkbox"/>	1 Oct 09
1 Oct 09	90806	Individual Psychotherapy 45-50 minutes		\$125.00	\$0.00		<input type="checkbox"/>	
8 Oct 09	90806	Individual Psychotherapy 45-50 minutes		\$125.00	\$0.00		<input type="checkbox"/>	

Transactions included in the Superbill have been marked as "Insurance Billed" with the Statement Date entered

The transactions that were included in the Superbill are now marked as "Insurance Billed" in the insurance account and the Statement Date you selected has been entered in the transaction record.