

HOW-TO GUIDE

Updating CHR Billing Templates

Please note: The CHR billing templates should only be updated on, or after, April 1 and only after your billing for the period up to March 31 has been completed. Questions? Contact: aaneumann@gov.pe.ca

To update your billing templates, please follow the steps outlined below:

1. From the main menu, click 1: **Settings** > 2: **Templates** > 3: **Billing**. A list of all current billing templates appears.

The screenshot shows a web application interface with a sidebar menu on the left and a main content area on the right. The sidebar menu is categorized into ACCOUNT, CLINICAL, PATIENT, and ADVANCED. The 'Settings' icon in the sidebar is highlighted with a red box and labeled '1'. The 'Templates' icon in the 'ADVANCED' section is highlighted with a red box and labeled '2'. The main content area shows the 'Billing' section, which is highlighted with a red box and labeled '3'. The 'Billing' section displays a list of templates, including '#1 Billing template', 'Gen surg Endo billing', 'surgery', 'Example 1 with comment', 'Dr. G Billing Template Western', 'Dr. M Billing Template', 'ER Shift Montague', 'ER Shift Montague copy', and 'KCMH Hospital Billing'. The 'Billing' tab is selected, and the 'Add Template' button is visible.

2. Locate the billing template(s) that you would like to edit and click on the template name to open it.

The screenshot displays the 'Edit Billing Template' interface within a web application. The interface is divided into a sidebar on the left and a main content area. The sidebar contains various navigation options, including 'Settings', 'Personal Info', 'ACCOUNT', 'Billing', 'Room Manag...', 'Scheduling', 'CLINICAL', 'Injections', 'Prescription', 'Referral', 'PATIENT', 'Patient Portals', 'CHR Connect...', 'ADVANCED', 'Case', 'Embedded V...', 'Folders', 'Notifications', 'Pathways', 'Presenting Issues', and 'Templates'. The main content area is titled 'Edit Billing Template' and contains several sections:

- TEMPLATE NAME:** A text input field containing 'Rx Refill - copy'.
- PAYMENT ISSUER:** A dropdown menu showing 'Health PEI'.
- BILLING PRACTITIONER:** A dropdown menu showing 'No Practitioner Select... Tap here to select one...'.
- FACILITY / CONTACT:** A dropdown menu showing 'O'Leary Health Centre'.
- Table:** A table with columns 'STATUS', 'CODE', 'DESCRIPTION', 'BILLED', and 'PAID'. A row is highlighted with a red border, showing 'READY', '2019', 'TELEPHONE PRESCRIPTION RENEWAL', '\$8.17', and '-'. Below the table, it says 'Facility Type: OFFICE Facility: O'Leary Health Centre'.
- INTERNAL NOTES:** A text area for internal notes.

At the bottom of the modal, there are 'Close' and 'Save' buttons. A notification area at the bottom right shows 'Rx Refill - copy' and 'Office visit + pap'.

- Once opened – click on the fee code, simply delete the fee code, and re-enter the fee code number associated with the billing template. You should see the new amount populate in the Base Amount window. If you have multiple billing items associated with the billing template, please remove and re-enter the fee code for each item. **Once you have updated each fee item in your billing template, please take care to click ‘Save’.** Your billing template is updated. You will need to update each of your billing templates.

The screenshot displays the 'Edit Billing Template' interface. The main form shows the following details:

- TEMPLATE NAME:** Rx Refill - copy
- PAYMENT ISSUER:** Health PEI
- BILLING PRACTITIONER:** No Practitioner Selected
- CLINIC SITE ID:** (Empty)
- PROVIDER ID:** (Empty)
- STATUS:** READY
- CODE:** 2019
- ADD FEE ITEM:** Button to add new items
- DIAGNOSIS CODES:** V681 Repeated Prescription (Situation) ICD9 PEI
- INTERNAL NOTES:** Search field
- SERVICE DATE:** mm/dd/yyyy
- TIME SPENT (MINUTES):** (Empty)
- START TIME:** --:--:--
- FINISH TIME:** --:--:--
- FACILITY TYPE:** OFFICE
- FACILITY:** O'Leary Health Centre
- Referred By:** (Empty)

The 'New PEI Billing Item' modal is open, showing a table with the following data:

CODE / DESCRIPTION	BASE AMOUNT	QUANTITY
2019 TELEPHONE PRESCRIPTION RENEWAL	CA \$ 8.17	1