

Subject: Booking or Posting an Appointment Having Multiple CPTs

This Help Note describes the ENCOUNTER FORM box for booking and/or posting an appointment having more than one CPT. This Help Note particularly applies to the evaluation and management (E/M) and interactive complexity codes introduced for 2013.

The onscreen Encounter Form is designed to be an efficient means for communicating diagnosis and CPT codes between clinical and administrative staff – supplanting the time-honored paper encounter form. As needed, see **Guide to Encounter Form.pdf** for details on the various fields and buttons comprising this form.

If desired, you can book an appointment for a single CPT, then include additional codes upon posting. If you want to post an appointment for multiple CPTs without booking multiple CPTs ⇒ Refer to the Posting Multiple CPTs section on the following page.

The standard rules regarding posting an appointment (at least one active diagnostic code, billing type selected etc.) apply. See Posting an Appointment.pdf as needed for background.

The duration of the multi-CPT appointment shown on the Appointment grid will be the duration of the longest-duration CPT code. For example:

99213 (Office/Outpatient): 15 minutes
90836 (E&M psychotherapy add-on): 45 minutes
Total duration: 45 minutes

When booking an appointment, you can select either the short- or longer-duration appointment first – the total duration will still be that of the longer-duration CPT code. However, when posting the appointment, to maintain the same total duration you must post the shortest-duration appointment first.

The Encounter Form is designed to reflect concurrent treatment. In the above example, a psychiatrist would devote 15 minutes of a standard 45-minute session to medical management (i.e., 99213) with the remaining time devoted to talk therapy. On the other hand, you should avoid using the Encounter Form for consecutive treatments, such as testing followed by therapy or medical management.

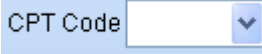

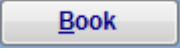
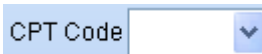

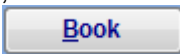
See **Encounter Form - Paper.pdf** for instructions on incorporating a paper-based encounter form – time-honored, or otherwise.

	Screen
Start at ►	Appointments

Booking Multiple CPTs

Task	Screen Response
1. In the Patient, , titlebox, select the patient	Patient name appears in titlebox

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2. Place your cursor anywhere on the Appointment grid, then right-click Encounter Form > Enabled on Screen	
3. Within the Appointment grid, place your cursor on the desired start time, then: Double-click OR Right-click Book > Book/Rebook OR Press Ctrl+B	Book Appointment form appears (Notes 1 and 2)
4. Within the Book Appointment form,  , select the CPT code	
5. Click  (not )	<ul style="list-style-type: none"> ENCOUNTER FORM box appears with first CPT code booked
6. [OPTIONAL] Enter number of units and diagnosis codes (Note 3)	
7. Within the ENCOUNTER FORM box, place your cursor within the empty area, then right-click Add CPT Code OR Within the Book Appointment form,  , select the next CPT code, then click  (Note 4)	
Repeat steps 4 through 7 as needed	
8. After selecting final CPT code, within the Book Appointment form, click 	Booked appointment appears on Appointment grid

Posting Multiple CPTs




1. Select booked appointment	Patient name and border becomes bold
2. Double-click OR Right-click Post > CPT OR Press Ctrl+Q	<ul style="list-style-type: none"> Post Appointment form appears ENCOUNTER FORM box appears (Note 5)


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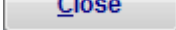
<p>3. Within the Post Appointment form, CPT <input type="text"/>, select the <u>shorter-duration</u> CPT, then click Post Multi CPTs (Note 6)</p>	<ul style="list-style-type: none"> Within the Post Appointment form: <ul style="list-style-type: none"> Bill for this CPT <input type="text"/> reflects patient charge for the selected CPT (Note 7) Estimated to Owe <input type="text"/> reflects amount estimated to be owed by the patient for the selected CPT Within the ENCOUNTER FORM: <ul style="list-style-type: none"> Under Posted, CPT code appears Row representing posted CPT turns ivory (<input type="text"/>)
<p>4. Select the <u>longer-duration</u> CPT code, then click Post Multi CPTs</p>	<ul style="list-style-type: none"> Within the Post Appointment form, Bill for this CPT <input type="text"/> reflects cumulative charge Within ENCOUNTER FORM, row representing posted CPT turns ivory (<input type="text"/>)
<p>Repeat step 4 as needed</p>	
<p>5. After selecting the final CPT code:</p> <ul style="list-style-type: none"> Enter amount paid by patient in Paid Now <input type="text"/> ← From Paid with <input type="text"/>, select as applicable If Paid with CARD <input type="text"/> or Paid with CHECK <input type="text"/> ⇒ Enter the card authorization number or check number (you must enter <u>something</u>) Click Done & Patt 	<ul style="list-style-type: none"> Posted appointment appears on Appointment grid Corresponding CPT records appear on the Accounts CPT Records screen





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Notes

1. Within the Book Appointment form, click  at any time to cancel the booking. If you do not see the ENCOUNTER FORM box ⇒ Click .
2. To delete an extraneous CPT code from the form box prior to booking or posting:
 - Select the CPT code to be deleted
 - Right-click **Delete Treatment Record**
3. To remove diagnosis codes for a selected CPT, right-click **Remove Diagnosis Codes**.
4. In the first means, the user initials are recorded, under . In the second means, the user initials are not recorded.
5. If the diagnosis codes are blank in the Post Appointment form, select the diagnosis codes from



If no diagnosis codes appear in these dropdowns ⇒ Click  and go to the **Dx/Problems** screen to enter the diagnosis and applicable pointers. See **Entering a Diagnosis – DxProblems Screen.pdf** as needed. If you enter the codes here ⇒ They will not be reflected in the **Dx/Problems** screen.

6. IF you wish to charge a single copayment applying to all CPT codes of the appointment ⇒ Check  **Forgive Copay**. With  **Forgive Copay** checked, TheraManager will waive the copay for all subsequent CPT codes for that patient. See **Forgive Copay.pdf** for details.
7. IF  **Deferred** billing ⇒  **Bill for this CPT \$0.00**. Always.