



Division of Public and Behavioral Health Policy & Procedure

Control #	Rev.	Type	Title	Effective Date	Page
			Spreadsheet Charge Input	2015-11-03	1 of 3

1.0 Policy

It is the Policy of the Division of Public and Behavioral Health (DPBH), Substance Abuse, Prevention, and Treatment Agency (SAPTA) that all providers, in accordance with 505 (a) of the Public Health Service Act (42 US code 290aa-4) which directs the Administrator of the Substance Abuse and Mental Health Services Administration (SAMHSA), to collect items including admission and discharge data.

The **Spreadsheet Charge Input** form is used to manually enter more than one client's charges at a time (which posts to the **Client Ledger**.)

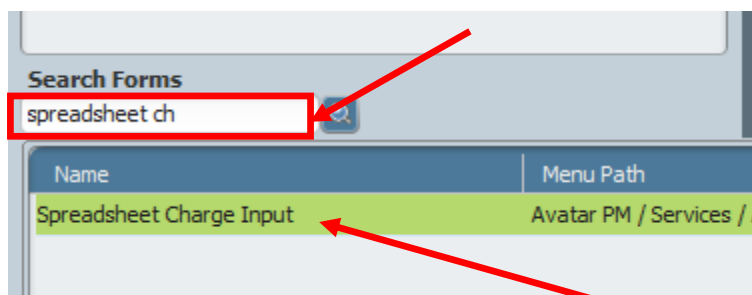
The **Client Charge Input** form is used to manually enter charges into a specific client's account (which posts to the **Client Ledger**.)

Charges are also posted to the **Client Ledger** through progress notes (either **Ambulatory Progress Notes** or **Progress Notes (Group and Individual)**).

Note: A managed care authorization (if applicable) must first be setup for the client in the **Cross Episode Managed Care Authorizations** form.

2.0 Procedure

1. On the Avatar home screen, type **Spreadsheet Charge Input** into the Search Forms widget in the bottom-middle of the screen. Double click.



2. This form functions the same as an Excel spreadsheet. Work left to right and ensure all mandatory fields are completed in order to submit the charges. NOTE: Tab through the fields.



Division of Public and Behavioral Health Policy & Procedure

Control #	Rev.	Type	Title	Effective Date	Page
			Spreadsheet Charge Input	2015-11-03	2 of 3

3. In the **Date Of Service** field, enter the service date.
4. IF APPLICABLE, enter the **Service Start Time** and the **Service End Time**.
5. In the **Client** field, enter the client name or ID, and select.
6. In the **Episode Number** field, select the client episode that this charge belongs to.
 - a. Double click the field in order to view the data to choose from.
7. In the **Program** field, select the client program.
 - a. Based on the episode selected, this field should auto-populate. If not, Double click the field in order to view the data to choose from.
8. In the **Service Code** field, enter the service code name or number, and select.

Note: You must ensure that this charge hasn't already been posted to the **Client Ledger** via a progress note.

9. IF APPLICABLE, enter **Modifiers**.
 - a. These are specific for billing purposes. If the CPT or HCPC code requires a modifier based on how the billing is being completed, enter the modifier in this field.

Spreadsheet Charge Input							
Date Of Service	Service Start Time	Service End Time	Client	Episode Number	Program	Service Code	Modifiers
11/01/2015	08:00 AM	08:30 AM	(1) ROBBINS,ST...	Episode # 2 Ad...	(01) Level 1 Out...	(H0015) IOP Alc...	

10. In the **Practitioner** field, enter the practitioner name or ID, and select.
11. The **Duration (in Minutes)** field should auto-populate based on the **Service Start Time** and the **Service End Time**.
 - a. If the **Service Start Time** and the **Service End Time** were not entered, enter the duration in minutes.
12. The **Location** should auto-populate.
 - a. If it's wrong, double-click on the field and choose the correct location. This field is based on programs, not practitioner so you may have the chance that it's not displaying the correct location.
13. IF APPLICABLE, enter the **Co-Practitioner** name of ID.
14. The **Cost of Service** automatically populates.
15. DO NOT NEED TO COMPELTE **Additional Service Information** field.
16. If the **Service Code** used correlates to a psychotherapy add-on amount, enter the duration (in minutes) in the **Psychotherapy Add-on Duration** field.
17. IF APPLICABLE, enter any **Add-On Notes** in the field provided.



Division of Public and Behavioral Health Policy & Procedure

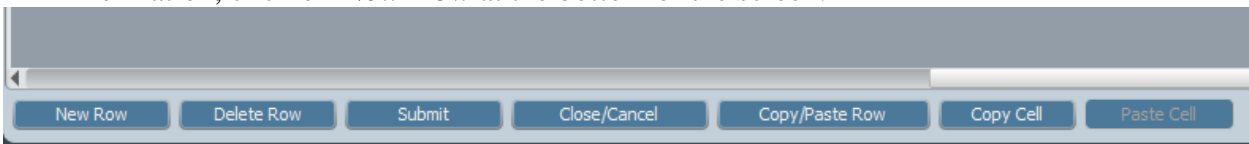
Control #	Rev.	Type	Title	Effective Date	Page
			Spreadsheet Charge Input	2015-11-03	3 of 3

Practitioner	Duration (Minutes)	Location	Co-Practitioner	Cost Of Service	Additional Service Information	Psychotherapy Add-On Duration	Add-On Notes
(000026) furlong...	30	(49) Quest Hous...		140.45			

18. IF APPLICABLE, enter the **Referring Practitioner** information.
 - a. This field will need to be uploaded based on the facilities request. Contact the Help Desk for more information.
19. IF APPLICABLE, enter the **Referring Provider** information.
 - a. This field will need to be uploaded based on the facilities request. Contact the Help Desk for more information.
20. Enter the **Diagnosis 1** in the field.
 - a. Search by number or description.
21. DO NOT NEED TO COMPLETE the **Active Medical Diagnosis**.
22. IF APPLICABLE, enter the **Diagnosis 2** and the **Diagnosis 3** in the fields provided.
 - a. Search by number or description.

Referring Practitioner	Referring Provider	Active Medical Diagnosis	Diagnosis 1	Active Medical Diagnosis	Diagnosis 2	Active Medical Diagnosis	Diagnosis 3	Active Medical Diagnosis	Diagnosis 4
			(F15.21) Ampheta...						

23. When you have completed a row for a specific client and need to enter a new client's information, click on **New Row** at the bottom of the screen.



24. Use the following features at the bottom for the following options:
 - **New Row:** add another client's information in order to post a charge to the account.
 - **Delete Row:** if you've added and row and need to delete the information before you submit, you have the option to delete the whole row.
 - **Submit:** once all data is complete and all charges for all clients have been documented, you must click submit for the charges to post to the client's account.
 - **Close/Cancel:** to close out without saving any changes.
 - **Copy/Paste Row:** to duplicate the service information from one row to the next, use this function.
 - **Copy Cell:** to duplicate a row use this function.
 - **Paste Cell:** to paste the copied cell from above.