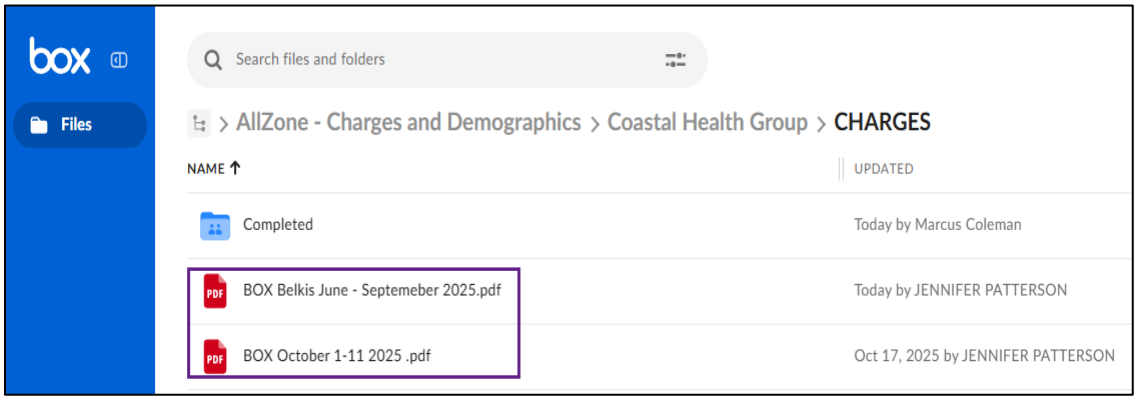
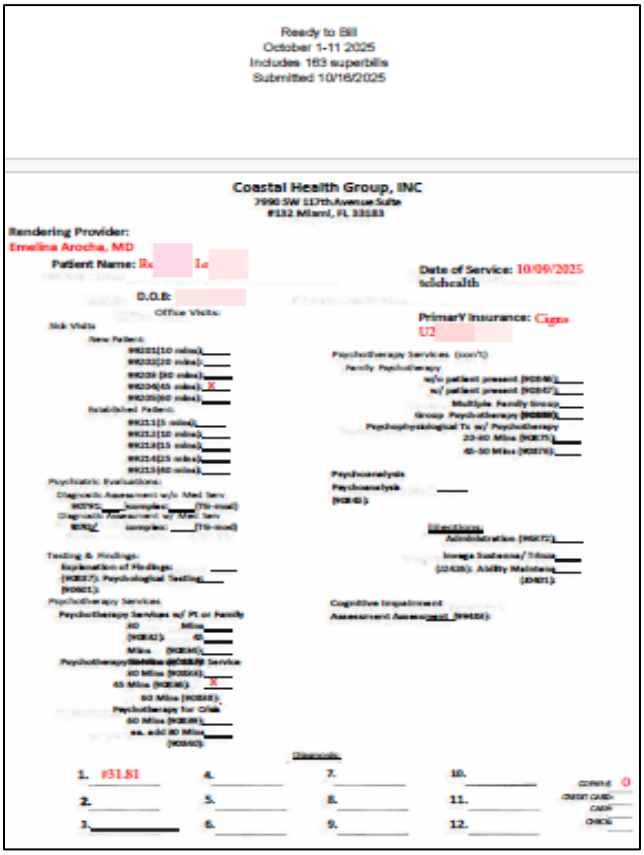
# Tip Sheet: Coastal Health Instructions – Superbills – ICANotes – Charge Entry

This tip sheet is intended to assist team members with processing Superbills stored in Box for Charge Entry from the ICANotes portal, specifically for Coastal Health Group.

| Steps | Action |
|---|---|
| **1**<br>**Box Superbills**<br>Open Box to Coastal Health Group > Charges. Look for PDF files named BOX with dates.<br><br>***Note:***<br>Files may have provider name as well after BOX. Both instances are listed in picture. |  |
| **2**<br>**Superbill PDF**<br>**Open Superbill PDF** file to begin reviewing patients listed.<br>These are patients that have charges to be loaded in PHI. |  |

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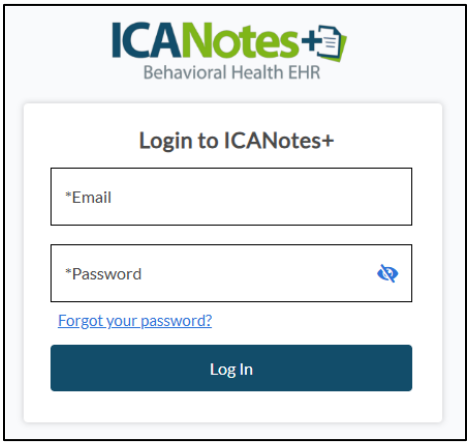
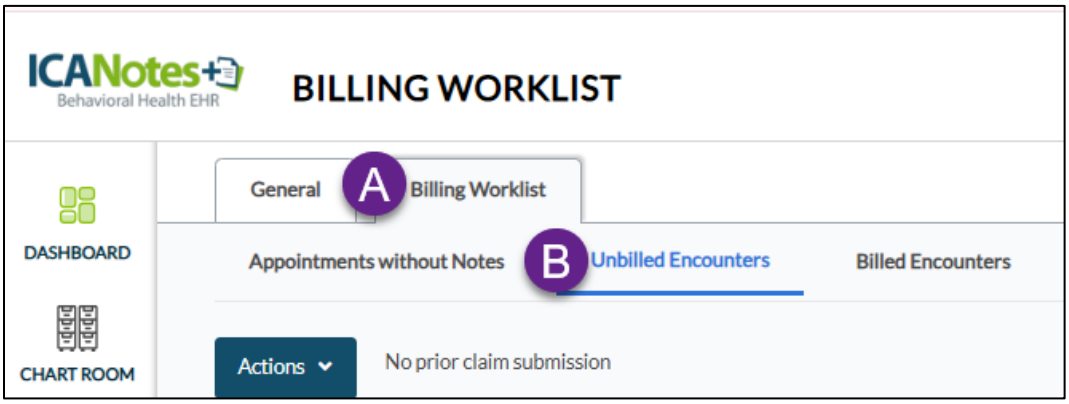
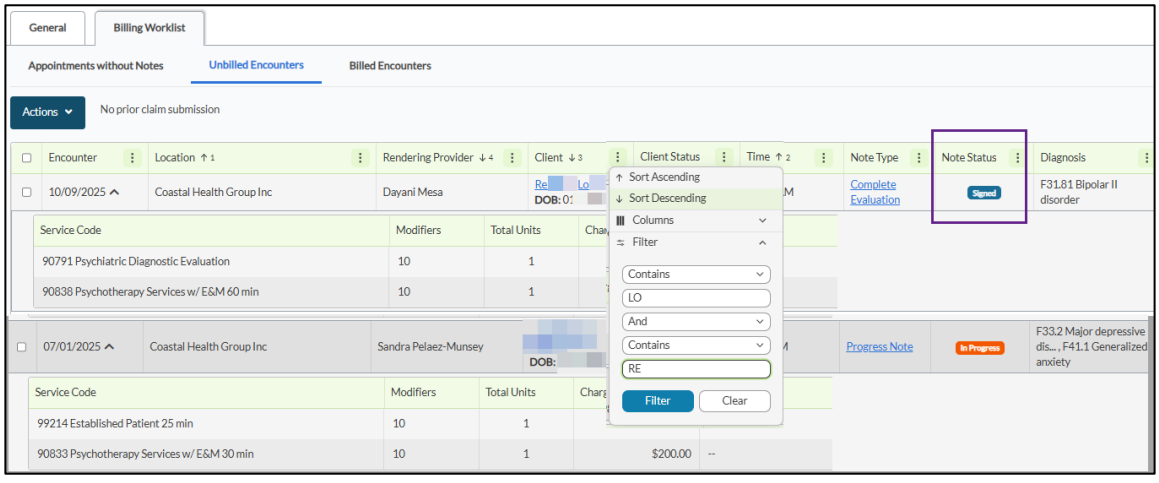
| **3**<br>**Logging into ICANotes**<br><br>Please log in using your email or distribution email and password provided to you.<br><br>***Note:***<br>If on a distribution email, please contact owner for any log in issues. |  |
| **4**<br>**Billing Worklist**<br>The default is the dashboard. Please follow actions below:<br>A. Select **Billing Worklist**<br>B. Select **Unbilled Encounters** |  |
| **5**<br>**Signed Charts**<br>Search for the **Patient's name** under Client using a partial Last and First name, then **Filter**.<br><br>Charts marked as **Signed** are charges to be keyed and processed in PHI.<br><br>***Note:*** If Note status is not marked as signed, please create a Task. |  |

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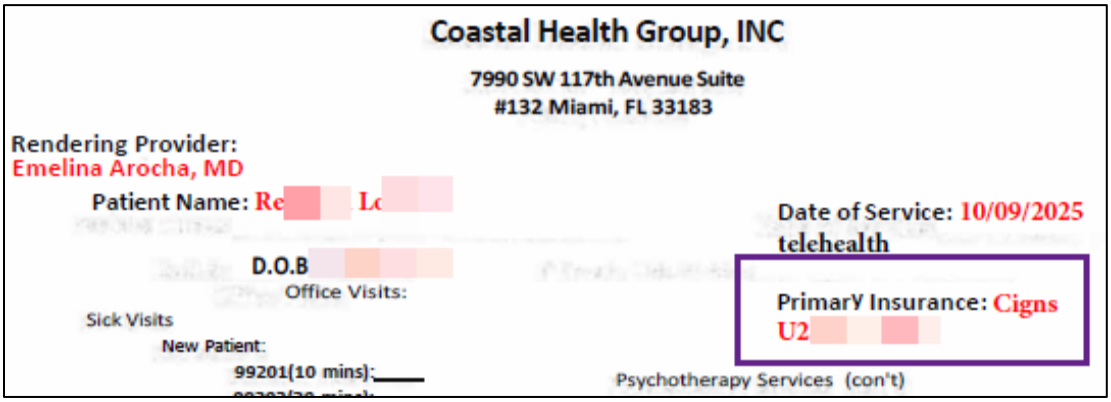
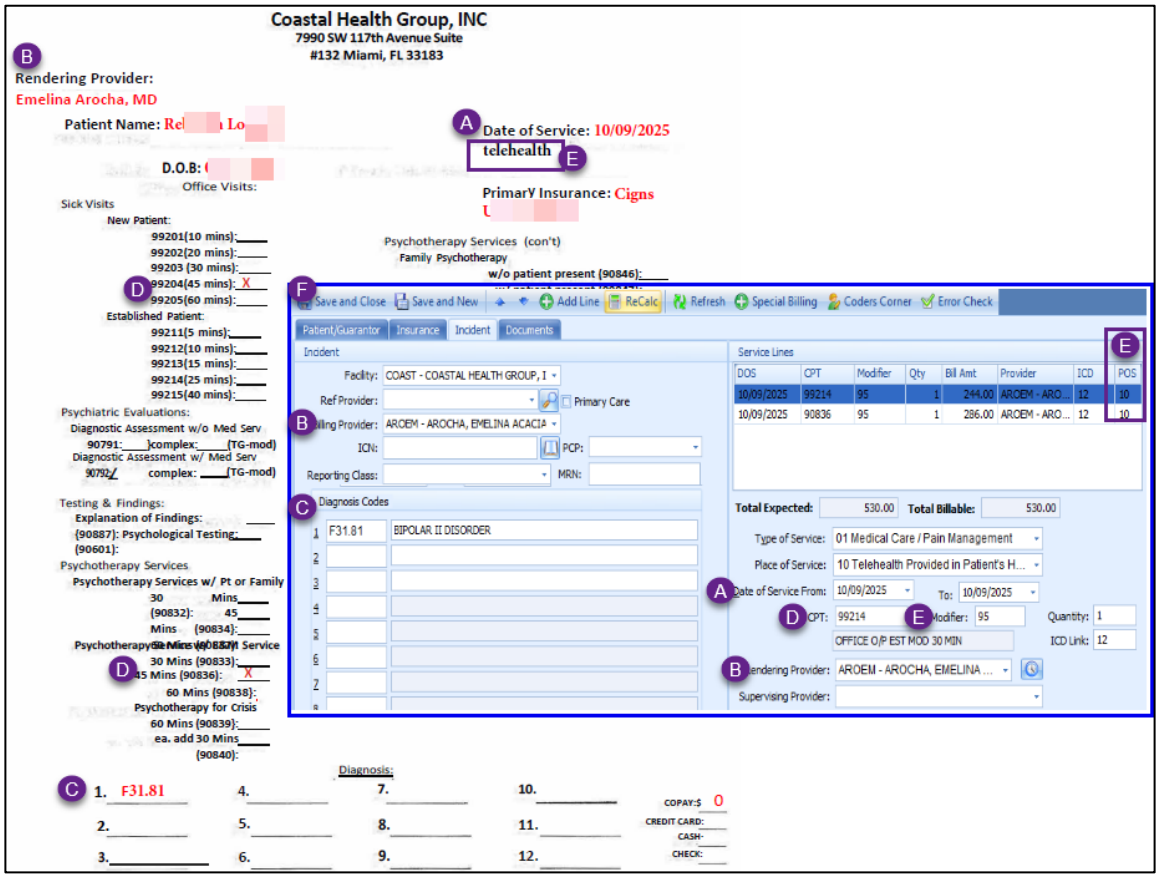
| **6**<br>**Insurance on Superbill**<br>Please enter the **insurance company** and **ID number** from the Superbill into PHI. |  |
| **7**<br>**Incident in PHI**<br>Please update the **Incident Tab** in **PHI** with the related letter from the Superbill:<br>A. **DOS**<br>B. **Billing** & **Rendering Provider**<br>C. **ICD-10** (diagnosis codes)<br>D. **CPT code**<br>E. **Modifier** - Any procedure being keyed must have the **95**-modifier appended to it when the **POS is 10** **if one is not listed, use 11*. The Superbill will state Telehealth after DOS.*<br>F. **Save and Close**. |  |

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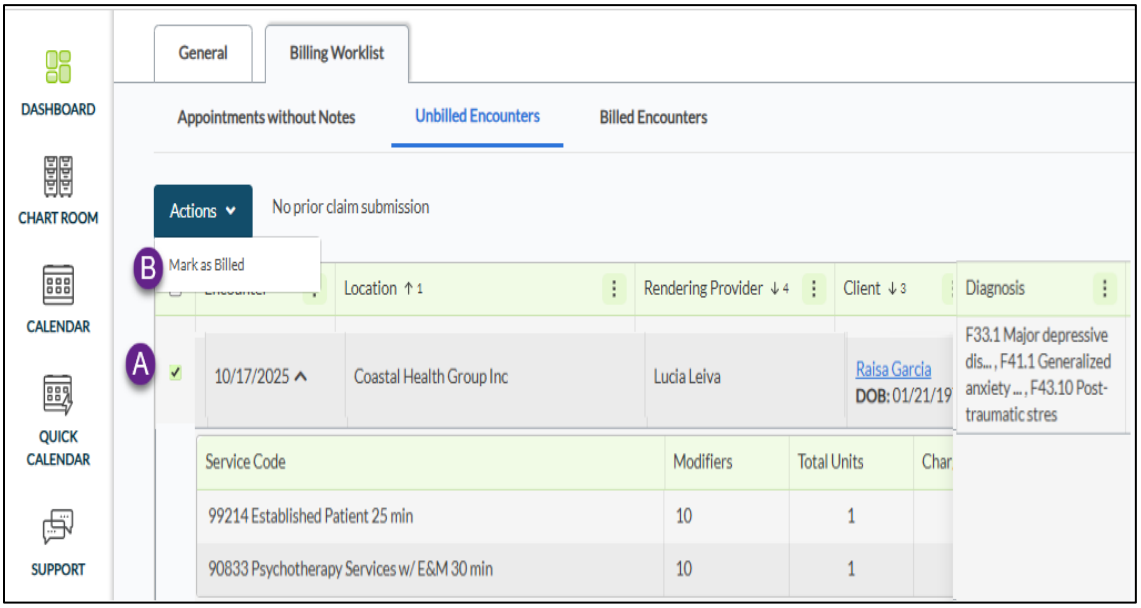
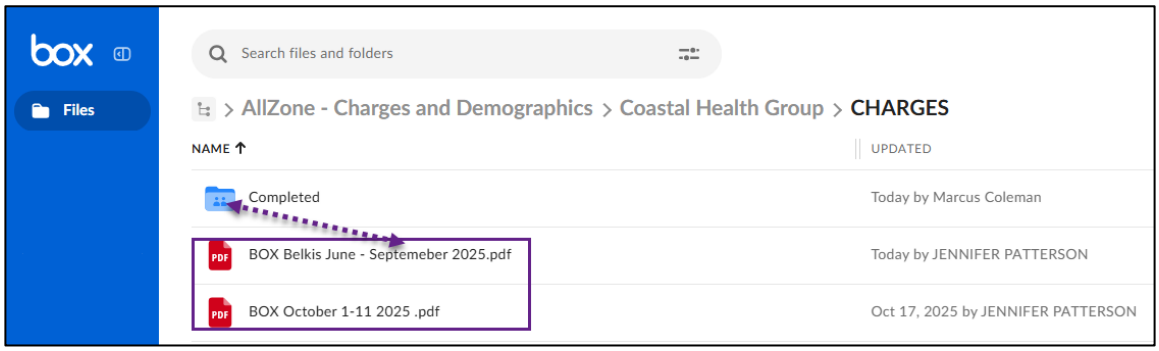
| **8**<br>**Closing Charge in ICANotes**<br>After all charges on the patient have been keyed in PHI for **Providers**, ***return to ICANotes*** to complete charge.<br>Please follow actions below:<br>A. **Check mark** the charge.<br>B. In Actions, use drop-down and select **Mark as Billed**. Now the charge in ICANotes is complete. |  |
| **9**<br>**Superbill in Box**<br>Move on to next patient in Superbill PDF. Once all patients and charges are loaded in PHI, move **Superbill PDF from Uploads to Completed folder** in Box. |  |