



Add Diagnosis and CPT codes to a Professional Claim


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Follow the steps below to add Diagnosis and CPT codes to a professional claim.


1. Select **Claim** > **Claim**.
2. Use the **Search field** to search for your claim.

 Check the **“Show exact matches only”** box to search for exact matches or **“Show unpaid claims only”** to show claims that may need follow-up.

3. Open the claim.
4. Click the **Charges** tab.
5. Enter at least **one Diagnosis code in the ICD A field** Or search for a diagnosis code from your list by clicking the  icon.


 Need to make another Diagnosis code the primary (first)? **Right-click** any of the ICD codes and select **“Set as primary diagnosis”** to update it on the claim.

6. You’re also able to interact with the ICD codes by right-clicking on them.
 1. **Set as Primary Diagnosis:** Moves the selected code into the ICD A field as the primary diagnosis.
 2. **Add Missing Code From Master List:** Allows you to add an ICD code (entered manually or through an interface) not currently on your local list from the master list without having to close the claim.
 3. **Copy:** Copies the selected code to your clipboard.
 4. **Cut:** Copies the selected code to your clipboard and removes it from the field.
7. Enter the **charge information** (e.g., Date of Service, CPT, POS, TOS, Modifiers, Unit Price, DX Pointers Unit Price, and Units).

 Copy a charge row by **right-clicking** on the charge line and selecting **“Copy Charge.”** This will duplicate your line charge information, including codes, modifiers, drug info, price, etc.

8. You're also able to interact with the CPT codes by right-clicking on them.
1. **Add Missing Code From Master List:** Allows you to add a CPT code (entered manually or through an interface) not currently on your local list from the master list without having to close the claim.
 2. **Copy:** Copies the selected code to your clipboard.
 3. **Copy Charge:** Duplicates your charge line information, including the code, modifiers, drug info, price, etc.
9. Use the **Status** drop-down menu to choose from one of the statuses by referencing the status descriptions below.
10. Click the **Other** hyperlink to enter additional information related to the claim, such as service information (e.g., drug information, measurements, DME (CMN) forms, and chiropractic information).



You can also change the order of charges entered by clicking the 2 lines to the left of the charge  , then drag and drop to the desired location/order.

11. Click **Save**.
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