# SurgiNet
## User Guide for Billers

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Updated August 2017
Questions or problems? Call Children’s IT Service Desk 24/7 952-992-5000 (4-5000 internal)
Add Charges to Perioperative Documentation

After a case is completed in the SurgiNet system, anesthesia time and supplies used on the case need to be added to the patient record. Additionally, PostOp time, Case Level, ASA Class and Speciality need to be verified.

The biller is given paper documents (such as the Anesthesia Paper Record) to obtain anesthesia time and supplies used in the OR. Billing for these items is done using the **IntraOp Doc** Menu item.

1. In the SurgiNet Organizer Case Selection window, if necessary, click the **Location** box to choose the correct location. In the date range fields, set your date range using the arrow buttons, then click **Retrieve** to find and select the correct patient and encounter.

   The patient chart is displayed. On the Menu, click **IntraOp Doc** to continue to the Documentation tab.
Enter Documentation Tab Values and Inactivate Segments

1. Click the **Case Times** segment. Enter **Anesthesia Stop Time** and verify that an **Anesthesia Start Time** was entered. If not, enter the start time, referring to the anesthesia documentation.

For Placeholder appointments, enter Patient **Out Room** time from the OR case as the Patient **In Room** time. Enter the **Anesthesia Stop** as the Patient **Out Room** time.

For NORA Anesthesia Cases (Anesthesia-Only), enter the Anesthesia **Start Time** in the Patient **In Room** and Surg **Start** time. Enter the Anesthesia **Stop Time** in the Patient **Out room** and Surg **Stop** times. To ensure that NORA Anesthesia charges are processed correctly, you need to complete the four required segments in the Documentation list, and then inactivate the rest of the segments. To move between segments, use the **Prev** and **Next** buttons.

After you enter stop time and click **Next**, you will see this message. Click **Yes**.

The **Case Attendance** segment displays. This information defaults in from the **Times** fields.
2 Click the **General Case Data** segment. Verify **Case Level**. If a higher-level procedure has been added, you must modify **Case Level** accordingly.

3 Confirm that the correct **Case Specialty** is documented for the longest procedure, if more than one procedure is performed in the General Case Segment.

4 Add **ASA Class** from the Anesthesia record. Other fields will automatically populate.

5 Open the Surgical Procedure segment and verify that the correct Procedure Code was selected, based on the **Surgeon’s Procedure Description** field.

6 For **NORA Anesthesia (Anesthesia-Only)**, on the **Surgical Procedures** segment, click to highlight the procedure names and display the data in all fields. Enter the **Surgeon’s Procedure Description**, with a free text description of what was done.

Verify that only the required segments are active (**Case Attendance, Case Times, Gen’l Case Data, Surgical Procedures**). To inactivate all other segments, click **Document** on the menu bar at the top of the window, then select **Case Logging**. Highlight all segments except the four required segments. Choose **Segment not needed** from the dropdown list, and click **OK**.

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Continue to the Pick List tab.

Note:

- Charging is set to start at 2 minutes – This accommodates occasions when we do not want to charge for a case, but the fields are required to be filled in. An N/A-None level will not charge for OR time.

- Cancellation of Case: Nurses enter the procedure time as 00:00 to 00:01. The procedure time is a required field even if a procedure was not performed. Make sure "Canceled Case" procedure is used. Free-text procedure should read "Canceled <scheduled procedure>" Level per department policy.

**Enter/Verify Pick List Items and Values**

1. Click the **Pick List** Tab. The Picklist for the case is displayed in the right column window.

   ![Pick List Screen](image)

   - **Validate what supplies were used on the case, and verify the totals in the Use Qty field.**
   - **Change the quantities in the Fill Qty and Use Qty fields, as needed.**
   - **Exclamation points (in red) indicate a duplicate supply exists on the case. Verify the duplicate supply to avoid inappropriate duplicate charging.**
   - **If you need to change a quantity for an item that already shows a Use number, change that quantity, do not enter another line item of the same item.**
   - **Any corrections that do not impact the IntraOp documentation can be done by the Biller.**
If you enter a **Use** quantity that is higher than a **Fill** quantity, you will get this message:

Click **Yes**.

To avoid this, press **Enter** twice after entering the **Use** quantity or enter your **Fill** quantity before entering the **Use** quantity.

**Note:**

- *If the RN added a free text item but it is built in SurgiNet*, the biller can add the item to the pick list with the appropriate used quantity. Change the RN documented item to 0, which does not impact the quantity used in the Intraop Doc.

- *If implants were used on the case*, verify that they are listed on the Picklist. If an implant is missed on the Picklist, but is in the Implant segment, the biller can document that it was used. Refer to the online responsibility grid.

- Also look to see if any notes were made at the bottom in the **Comment** section. If the RN documents that an implant was used, the Biller may add the implant to the Picklist for billing.

- If there is a question as to whether an implant should have been documented, check with the RN Case Attendee and confirm.

3 To **add an item to the Picklist**, first click the procedure (a procedure and an item must be associated before adding the item as a supply), click the **Ellipsis** button to open a search box and search your location.
To search for and select the item in the Find All Items window, the recommendation is:

- **Recommended search:** Checkmarks in the following boxes - **Item Number,** **Description,** **Mfr Catalog number.** Search for = **Includes.**

- Click to check the **Location** box. Click the dropdown arrow to select the Location. Once selected, it is your default Location.

- Click **Find Now.** Search results will display in the results window.

- Click **OK** to display the item on the Picklist tab.

To add an item that is not in the system, use the Free-Text Item functionality. First, click the procedure (a procedure and an item must be associated before adding the item as a supply). Then type the actual description of the item in the item search box. Click **Add.**

This message box displays. Click **Yes.** The item will populate the picklist.

Enter your **Fill** and **Use** quantities.
When the Picklist is saved and the document finalized, the Free Text Item will flow to Charge Services and, at that time, the biller will be able to modify all necessary information including CDM, Price and Description.

6. Enter your **Anesthesia** charges, per your site.

7. First, click to highlight the procedure (a procedure and an item must be associated before adding the item as a supply), then search for and select the anesthesia item.

8. With the anesthesia item selected, click the **Add** button.

9. After you click **Add**, it moves to the Picklist window. Calculate the anesthesia time from the charge sheet, and enter the minutes in the **Used Qty** and **Fill Qty** fields.

Click the **Save** icon when finished, and continue to the Post Op Record.
Enter Post-Op Time and Run Reports

1. To add your Post-Op time, select **PostOp Record** from the dropdown list above the Document/Pick List window. These times should flow in from the Case Tracking events set in Phase I and/or Phase II. If the fields are empty, refer to IView/I&O for the times documented by nursing staff.

   ![Image of PostOp Record dropdown list]

**Note:**

- Enter/verify Phase I times. Anesthesia stop time should always equal the Phase I start time.

The Phase I nurses use two methods of documenting Phase I times. The actual documentation is done in the IView Phase I-Phase II bands in the patient's chart. The second method of documenting is done in Case Tracking. Nurses “set events” for Phase I. Enter Phase I Time In and Time Out time on the board. These times then flow into the PostOp times in the OR record. Phase I Enter time is the time that transition of care occurred between Anesthesia staff and Phase I staff. Phase I charges are entered on a powerform by nursing staff.

- If patient is transferred to NICU/PICU without going to Phase I, leave all PostOp times blank.
- If patient is admitted after surgery, only the Phase I times should be entered.

2. Click the **Finalize** icon in the toolbar (green flag) when finished.

3. Run the PACU Time Analysis Report in Discern Analytics.

4. Run the Billing Audit Report in Discern Analytics to resolve time discrepancies.
Charge Review

The **Charge Review** application is used to place charges on hold, view pending charges, view details associated with charges, or delete charges. SurgiNet handles charges through a combination of a charge queue and an ops job that runs at defined intervals. There is a charge queue that holds all charges that need to be sent. The ops job then reads the queue and compares that information with what was sent previously to determine what needs to be updated.

Open Charge Review from the patient’s chart in SurgiNet by clicking on the **Charge Review** icon or from your app bar. The SurgiNet Charge Review screen displays.

- Right click, and select properties to view patient's name.
- Click **Refresh** before “run charge job” - if you run charges without refreshing, you may not see everything in the job.
- Possible issues display in red (e.g. inaccurate times or dates)
- If something appears without a charge code, it is built incorrectly. Contact Children’s IT Service Desk (952-992-5000 or 4-5000 internal).

**View Pending Charges**

When you open the Charge Review application, pending charges are listed automatically. Pending charges are charges that are ready to be sent to the charging system. Items will stay on this list until they are sent either manually, or through an ops job. When charges are sent, they are removed from this list if they are sent successfully. If there are problems sending charges, those charges will still be listed with a displayed reason for failure.

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### Changing Charge Information – Quick Reference Table

<table>
<thead>
<tr>
<th>Action</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Deleting</td>
<td>Pending – Right-click, release charge, absorb</td>
</tr>
<tr>
<td></td>
<td>Interfaced – Right-click, credit</td>
</tr>
<tr>
<td>Add price</td>
<td>Interfaced – Right-click, modify charge information, change price on 3rd tab</td>
</tr>
<tr>
<td>Change price</td>
<td>Pending – Right-click release charge</td>
</tr>
<tr>
<td>Change CDM</td>
<td>Freetext item – Right-click, release charge, double-click (follows price override process)</td>
</tr>
<tr>
<td></td>
<td>Not a freetext item – Credit charge, select correct pick list item and process (do not modify code)</td>
</tr>
</tbody>
</table>

### Place Charges on Hold

You can place charges on hold so they remain in the queue, instead of completing the entire run job process. Some users also have security to release the hold on a charge. Items that are on hold are displayed in blue, and the reason for placing the charge on hold is displayed in the **Comments** column.

**Note:** If you have anything on hold, remember to un-hold those charges when you are ready to send them through.

1. Right-click the item you want placed on hold, and click **Toggle Hold Status** from the dropdown.

   You can also click the **Toggle Hold Status** icon in the tool bar.

**Note:** To choose multiple items to place on a hold status, hold down the **CTRL** button, and click the items to select.
The item will now display in blue, with the hold comment indicated, and is placed in a hold status.

3. Click the Save icon when finished. Click Refresh.

**Remove a Hold Status**

You can release the hold on a charge if you have security to do so. Items that are on hold are displayed in blue and the reason is displayed in the Comment column.

1. Right click the item you want removed from a hold status, and click Toggle Hold Status from the drop down list. You can also click the Toggle Hold Status icon in the tool bar.

2. Click the Save icon when finished. Click Refresh. This removes the hold status, and the item will now display without the hold icon indicated.
**Delete a Cancelled Case**

You can choose to delete a cancelled case from the Charge Review screen. **Important!** Be sure you are deleting the correct charge items for the appropriate case – you cannot undo a “delete”. To see the patient’s name, right-click the Case# and select **Properties**.

1. Right-click the row you want deleted, and click **Delete** from the dropdown list.

2. The following message displays. Click **Yes**.

3. Click the **Save** icon when finished. Click **Refresh**.

Once you have deleted charge items associated with the case, the case (number) will also drop off the Charge Review list.

**Run a Manual Charge Job on IntraOp Records**

You can run a manual charge job by selecting **Run Charge job** from the **Task** menu. This runs the selected charge or charges through the system immediately.

**Note:** Before you do this, make sure that all holds are placed on the appropriate charges.

1. Click **Task/Run Charge Job** from the menu bar.

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The Charge Job Options dialog box displays. Click the **IntraOp** document type, and click **Run**.

**Display Charge Details**
You can look up charges that have been sent and are no longer pending.

1. From the Charge Review screen, click **Charge Lookup**.

2. On the Charge Review - Charge Lookup window, click the ellipsis button to search for the case number or enter the case number associated with the charges you want to view in the **Case Number** field, and click **Retrieve**.
The Charge Review screen will display the charge results for the selected case number.

View Charges in Charge Viewer

After you run your charge job, open Charge Viewer to validate that the charges have defaulted.

1. From the Charge Review window, click the **Charge Viewer** icon.

2. To view only Surgery charges, click **View, Filter Options** from the menu bar in Charge Viewer. In the **Filter Options** window, set your date for the “date of surgery” for charges you want to view. Click **OK**.
You can click in the **Save as default** checkbox to save this view.

3 The Charge Viewer screen displays the patient IntraOp charges. Click the blue charge line(s) to expand the list of charges.

- **Pending** Status – Charges are successfully generated, but not yet interfaced or posted.
- **Suspended** Status – Charges are successfully generated, but are missing a piece of information before being sent to the billing system.
- **On Hold** Status – Hold logic is defined in CSTierMaint. These must be manually released or released with an ops job. Need to do patient Check In before it can be processed successfully.
- **Manual** Status – Charges that a price must be entered manually in CSChargeViewer, rather than automatically being assigned predefined prices.

- **Absorbed** Status – These charges have been absorbed using the CSChargeViewer.

- **Offset** Status – These debits have been offset by a credit before the debit was interfaced.

- **Adjusted** Status – These charges have been adjusted using the CSChargeViewer before they were interfaced. The changes are reflected in a new charge that is pending (0). These charges will not be sent to the billing system.

4. If you need to modify any charge, right-click the charge and click **Modify Charge Information**.

5. The **Modify Charge Information** window will display: Modify charges as usual, and click **OK**.

6. Click **Task, Exit**, or click the **x** in the upper right corner, to exit Charge Viewer.
Price Overrides in Charge Viewer

When you do a price override, the charge will automatically suspend (shows 0 in the price column).

1. Open the Charge Viewer application.

2. The Charge Viewer screen displays with the patient IntraOp charges results displayed. Click the charge line(s) to expand the list of charges.

3. If you need to do a price override, right-click the charge and click Release Charge.

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4 The **Suspended Charge Release** window displays. Double-click the item to open the Manual Charge Release window.

**Note:** For free-text items, use the Manual Charge Release window to add a price, or update the description or the CDM.

5 In the Manual Charge Release window, enter the appropriate charge amount in the **Price** field.

You can also change a generic bill code to another CDM – Some high-dollar free-text items have better reimbursement if a defined CDM is used.

**Note:** The CDM patient charge amount in the billing system (Charge Master) must match the “Price” entered in this window.

Change the **Charge Description** text to what was actually billed.
6. Click **OK** when finished.

The price you entered will populate the **Price** field in the Suspended Charge Release window.

The price you entered will also populate the Charge Viewer screen.

7. Click **Release All** in the Suspended Charge Release window.

8. If you do not want to charge for an item, highlight the item and click **Absorb All**.
Bill for Off-Hours Anesthesia-Only Cases

Use Surgical Case Manager to add or remove a case that occurred after hours.

Add a Case

1. Click the New Case icon or select Case/New Case from the menu bar.

2. In the Person Search window, search for and select the correct patient.  
   **Note:** When you schedule a case in Surgical Case Manager, you *cannot attach an encounter* to the patient. This is done by the Circulator when they check them in when opening the IntraOp Doc.

3. Complete all required (yellow) fields:
   - **Surgeon** – Search for and select the correct surgeon.
   - **Priority** – Always select Add-On.
   - **Surgical Area** – Select your location.
   - **OR** – The list displays the rooms for the location you selected.
   - **Encounter Type** – Always select Surgery.

4. Click to check the Add On Case box to print a picklist when you save this case.
5. Click **Add** when all fields are completed.

6. After you click **Add**, the Surgical Procedure window displays for your entries:

   Select the procedure code.

   **Note:** Anesthesia Type, Speciality and Duration should display automatically.

   If this is the Primary Procedure, click to check here.

   Click **OK** to add the procedure.
If additional procedures are needed for this case, click Add. The Surgical Procedure window will redisplay. Repeat Step 6, and complete all required information. When you are finished adding procedures to the case, click the Apply button.

If a primary procedure is not assigned, right-click the procedure that you want as the primary, and select Primary Procedure. Click Apply again.
7 Click **OK** to confirm the new case.

8 Exit Case Manager to return to the Case Selection window.

9 **VERY IMPORTANT!!** Click the **Retrieve** button to refresh your screen. Your newly scheduled case will display in the Case Selection window.
Check In an Anesthesia-Only Case

When you open IntraOp Doc from the Menu, you are prompted to check in the case.

- If the FIN is correct, click Accept.
- If the FIN is not correct, click Re-select and choose the correct encounter.

If the case was scheduled in the Scheduling Appointment Book, you will get this Check In window. Be sure to change the Date field to the day of surgery (check in date), then click OK.
Cancel an Existing Case

VERY IMPORTANT!!! Cases scheduled in Case Manager must be cancelled in Case Manager!

Cases scheduled in Case Manager are identified in the Case Selection window with the Case Manager icon.

1. Open Surgical Case Manager from the SurgiNet menu bar.

2. In the Case Manager window, click on the Cancel Case icon or click Case/Cancel Case from the menu bar.

3. The Select Case window displays. Search for your case by Date or Case number. Enter your date range, and click Retrieve. Then click the correct case to cancel.

4. The Cancel Case dialog box will display a summary of the selected case. Click the Case button to see more details.

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5 Search for and select the Surgeon who is requesting the cancellation in the **Cancellation Requested For Surgeon** field.

6 Enter the name of the person who is requesting the cancellation, in the **Cancellation Requested By** field.

7 Click the arrow to select the **Cancellation Reason** from the dropdown list.

8 Click **OK**.

9 If you clicked **OK** to cancel the case, a message displays. Click **OK**.
Audit Reports and Tools

- Print Surgery Schedule from **SurgiNet Report Builder** to use as a checklist.
- Print/View Billing Audit Report from **Discern Analytics**.
- Print Implant Log from **Discern Analytics**.
- Print PM audit reports from **PM Report Builder**.

**Open SurgiNet Report Builder**

1. In SurgiNet, click the **Report Builder** button on the menu bar, or click **Report Builder** on your app bar.

2. Work with the reports in the Report Builder window.

**Open Discern Analytics**

1. Click the **Discern Analytics** icon on your app bar.

2. Work in the **Discern Analytics** window.
Open PM Report Builder

1. Click the **Reporting** icon on your app bar.

2. In the Reporting window, click **Action** from the menu bar, and select **Build Report** from the dropdown.

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3. On the **Person Mgmt: Report Builder** screen, look for reports for your site (e.g. Surg Charges Pending, Surg Charges Manual).

4. Click the report to highlight. Click **Preview Report** icon.

5. Your print preview displays. Click the **Print** icon to send the report to the printer.

6. Go to the case and update the problem (i.e. needs a price, absorb the charge, etc.).

7. Go back to **Pending** reports, and click **Print** from the menu bar.

**Note:** Use the report for auditing on the following day.

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