Claims can be created and uploaded at any time. Close Reference Batches containing claims that are ready to be sent. All claims in a Ready to Submit/Resumit status in a closed reference batch will be 'Batched'. Use the Job Scheduler to automate the process. See Help Center > Post Charge, Reference Batch

How to manually Batch and Upload Electronic claims	1
What should I do if I receive an error message while uploading a claim?	2
Job Scheduler: Batch Claims	3
Print on Plain Paper	4
How do I print one claim at a time?	5
How do I delete a Claims Batch?	5
Where can I find out details of a claims batch?	5
How to find the History of Claims batches?	5

How to manually Batch and Upload Electronic claims

- 1. Claims in the sidebar or the 'Go-Cut' 5
- 2. From the 'Claims Management' page > Click [Batch New Claims]

Dationt	Claim Batch History			
Scheduling	2 Batch New	Create a New Clai	ms Batch 🤨	
Charges	⊂ ∓ ⊠ Claims	Charges Posted From	<u>I</u> hru	
Payments	Claims Batches Today Cla	ms Batches This We Reference Batch		
Claims 1	1/35 23/	582 Paver ID		
Statements	- I I I Claim Ratches To Re Sent/Printer	Only With Status		
		Note		
		<u>S</u> plit by		
		No splitting		

- 3. Click [Create Batch] in the pop up there is rarely a need to filter
- 4. Wait for the Popup to say 100%
- Now look in the 'Claim Batches to be Sent/Printed section > Click the batch number hyperlink



From the 'Claims Batch Page'

- 7. [Upload Claims]
- 8. 'Yes' in the popup
- 9. Close after 100% in the next popup



What should I do if I receive an error message while uploading a claim?

If you are manually uploading your claims batch i.e. not using the job scheduler to gather the batch and upload, you may see an Error message.

• Error - Done With Warning > This message indicates there are one or more encounters with Local Edit Errors that will not be sent in this batch. All of the rest of the encounters are uploaded in this batch - as we can see in the status section. It is not necessary to 'view warnings' as we will see these claims in the Encounters by Status section or we can click 'Claims Batch Items' to review the error on claim and resubmit.

	Claims Batch Dashboard			E	Batch: <u>79</u>
	- 🕀 🔀 Summary <u>Claims Batch Items</u> <u>Edit Batch</u>	h Info			×
	Uploading				
Claims Batch Dashboa		Upload Claims		59:31	
→ Summary <u>Claims Batc</u>	Total number of claims: 11 Total amount: 5,767.00		4000/		
	Date/Time	ERROR - DONE WITH W	ARNINGS. VIEW WA	RNINGS	
	- 🛨 🔀 Summary By Insurance		Close		
Total number of claims: 1 Total amount: 5,767.00	1				
Date/Time	Fi	le	Status		
04/17/2019 • 05:28 PM	claim_460541166_79S1_o	oenpm 🚽	CREATED		
04/17/2019 · 05:28 PM	claim_460541166_79S1_o	penpm	UPLOADED		

Error - Batch was not sent >

This warning is less likely and means all claim have local edit errors so the batch is not sent

To view the errors from the Claims Batch Dashboard > Click Claims Batch Items > check 'Errored Claims Only'

	×
Upload Claims 59:56	1
100%	1
ERROR - BATCH WAS NOT SENT VIEW ERROR LOG	
Close	

Or go back to Claims by Status page > LE - Local Edit Errors

Claims B	Batch Das mary <u>Claim</u>	hboard)					
	List of C	laim Batch	Items 🔺			Batch: <u>79</u>		-
	Filter Crit	eria <u>C</u> lear 🛓 ame/ID	Encount.	ihous	e Error Code	Reason		Errored Clai <u>m</u> s Only ✔
	Search	All Cha	inge Status					
	Encounter	Pa Pa	itient 🦿	.e	Status			
	<u>3090</u>	<u>650782</u>	LOCAL EDIT E	RROR	LE [2] 65	R Claim:650782E3090 0782E3090 IS MISS) - 2010BA ING	- SUBSCRIBER LN

For more information on the use of local edit errors go to Libraries > Charge Management

Job Scheduler: Batch Claims

The Batch Claims Job is recommended after a clinic has manually uploaded several claims batches. This allows you to become accustomed to how to work clearinghouse and payer rejections, as well as mastering the skill of manually uploading claims.

1. Go to Admin > [Job Scheduler]



Some paper claims must still be printed. Even if the clearinghouse is processing your primary paper claims, some secondary/tertiary paper claims (that don't allow electronic filing) will need to be locally printed and mailed.

• Use the 'push pin' to pin the 'Claim Batches to be Sent/Printed' section from the Claims Management Dashboard to your Home Dashboard in order to be alerted that Batches need to be printed.

Claims Management D	ashboard			
- 🛛 Claim Batch History				*
Batch Ne	w Claims	Search	Claim Status Report	
⊂ ⊞ ⊠ Claims Claims Batches Today	Claims Batches This Week	Claims Batches Not Sent		1
0/0	11 / 5058	0/0		_
- 册 ⊠ Claim Batches To Be Se	ent/Printed			1
			There are no records available	Pin to Home Dashboard

Print on Plain Paper

- 1. [Batch New Claims] skip this step if using the claims Job Scheduler
- 2. Click on the paper claims batch number
- 3. Click [Print on Plain Paper]
- 4. Click 'Open Claim File' link
- 5. Click the printer icon at the bottom of the PDF to print the claims in this batch

This results in an Claims Management Dashboard Encounter Status of Claim Batch History 'Printed' Batch New Claims A Claim Status Report Search 1 Claim Batch To Be Sent/Printed Batch Created Ci Туре Status 1239 ELECTRONIC/ANSI 08/13/2015 NOT SENT 3 07/24/2015 NOT PRINTED 1237 HCFA 3 **Claims Batch Dashboard** Batch: 1237 Edit Batch Info R Print On HCFA Print On Plain Paper 3 **Upload Claims** 29:32 Total number of d Total amount: 968 History 100% OPEN CLAIM FILE 4 Time Close E Summary By SECONDARY 高速 INSURANCE CLAIM FORM PLAN BURLUN X w X Q Q THES X NO er: 44947 Name: KENNEDY, CAROLYN A Encor Patient: 1 nter Dashi Modify Charge Change Claim Status - Print Claim A Charge Forms Reverse Charge Balance Transfer To Collecti Re-Apply Patient Credit di Ansi Previe Dunning/Statement Count Send To M How do I print one claim at a time? 1) Check 'Set Status to be **Print Claim** PRINTED' Go to the Encounter > Print Claim For: BLUE CROSS / BLUE SHIELD 2) Check 'Preview' to view what Set Status To PRINTED: Click [Print Claim] > the completed HCFA will look Use Form: HCFA . like and/or to print it on plain [Run] Preview 0: 🕢 2 paper Horizontal Margin: Use Default V 3 3) Margin settings should pull Vertical Margin: Use Default V from the Default System Settings Run

For more information, See the Help Center > PDF > Aligning Print Claims

How do I delete a Claims Batch?

There are times we no longer need the claims batch, such as we manually gathered a claims batch and also a scheduled claims batch job ran with the same encounters or manually printed a claim, that is in a scheduled claims batch.

- 1. Admin> Delete Claim Batch
- 2. Choose the Claims Batch number
- 3. [Save]

Admin
Admin
Admin
Admin
Delete Claim Batch
Claim Batch ID
1487

Where can I find out details of a claims batch?

Claims Management Dashboard

- → Link to 'Claim Batch History
- → Number of claims and amount
- → 'Status' of the Claims batch FILE

Claims Manage	ment Dashboard	Batch: <u>2030</u>		2
Claim Batch His	aims	File		
Total number of claims: 86 Total amount: 137,367.12	58			
Date/Time	File	Status	Note	ок
Date/Time 02/09/2017 • 11:14 PM 02/09/2017 • 11:14 PM	File claim_990176859_2030S1_openpm claim_990176859_2030S1_openpm	Status CREATED UPLOADED	Note	ок 0

How to find the History of Claims batches?

Claims Management > Claims Batch History

Find here all the encounters in this batch and the current Claims Status

- Status Column has hover over text : for instance Clearinghouse Accepted / Clearinghouse Rejected
- Click Encounter number hyperlink to fix claims

	Claims Management	Dashboard > Claim Batc	h History					Reference Ba	atch:		
List of Claim Batc	h Items		E	Batch: 2030	Ty	pe: 02	Created: 02/09/20	017 • 11:09 PM			
Filter Criteria <u>Clear</u> Patient Name/ID Search	Encounter	DOS	Insurance	Errored Claims	Only						
Select All Chang	e Status							1 2 Next	Page Size:	500 •	1-500/8
Encounter	Patient	**~me		DOS	Amount	Ins/Ord	Insurance	Status	Local Edit	Reply	Other
	0			02/01/2017	115.47	1	AKAMALADV [AKAD]	CA	OK	OK	
621387 19	<u> </u>			02/01/2011	110.44			and the second se		on	
621387 19 626978 25	<u>4</u> 8			02/08/2017	78.40	1	MEDICARE [MED]	C			
621387 19 626978 25 618475 23	<u>∡</u> 8 5878			02/08/2017 01/30/2017	78.40	1	MEDICARE [MED] HMSA [HMSA]	C CLEARIN	IGHOUSE ACCI	EPTED	
621387 19 626978 25 618475 23 627123 10	<u>8</u> 5878 17			02/08/2017 01/30/2017 02/08/2017	78.40 196.70 129.34	1 1 1	MEDICARE [MED] HMSA [HMSA] HMSA [HMSA]		IGHOUSE ACCI	EPTED	

Cancel

Save [F2