CATEGORY: CLAIMS BATCH Creation_Upload_Print

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
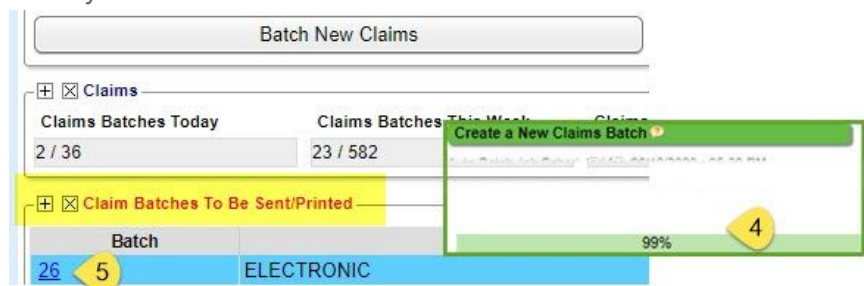
How to manually Batch and Upload Electronic claims

1. Claims in the sidebar or the 'Go-Cut' 5
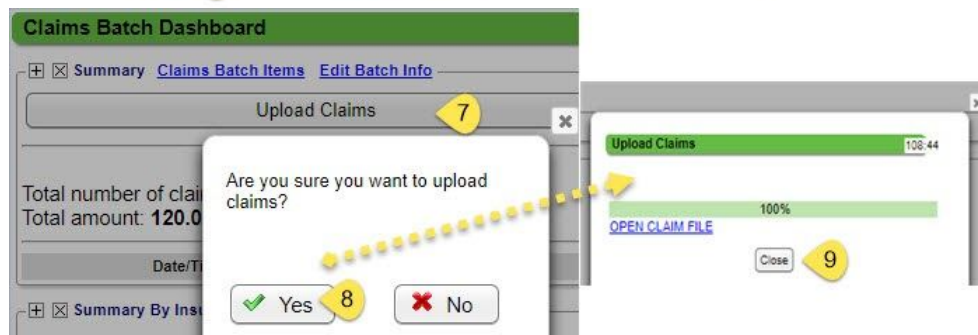2. From the 'Claims Management' page > Click [Batch New Claims]
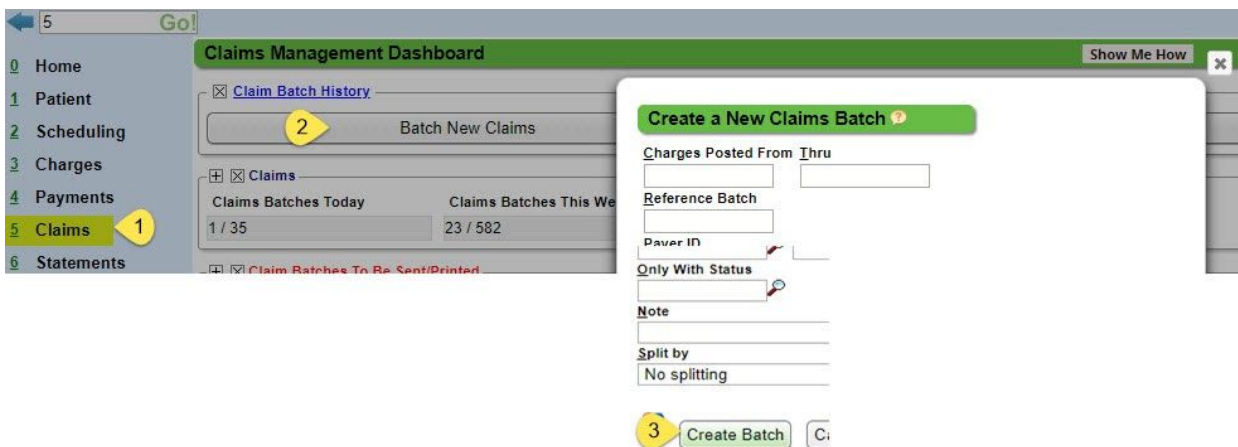
3. Click [Create Batch] in the pop up - there is rarely a need to filter
4. Wait for the Popup to say 100%
5. Now look in the 'Claim Batches to be Sent/Printed section > Click the batch number hyperlink
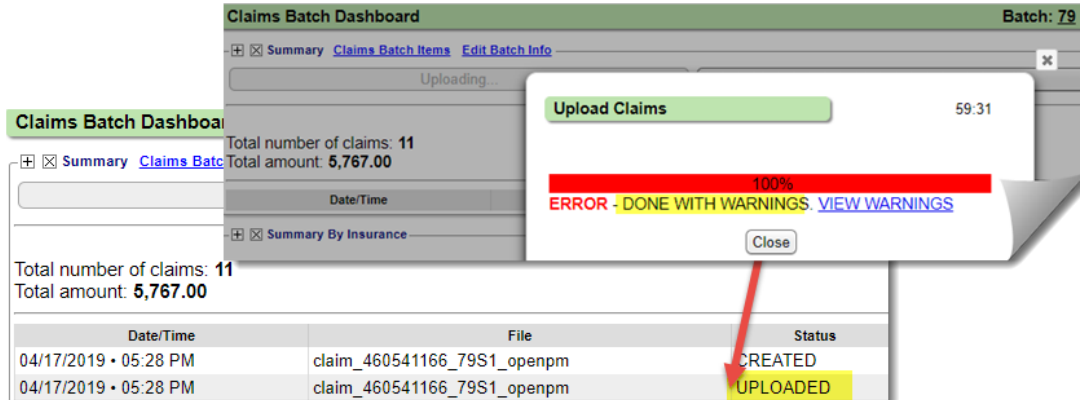

From the 'Claims Batch Page'

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.
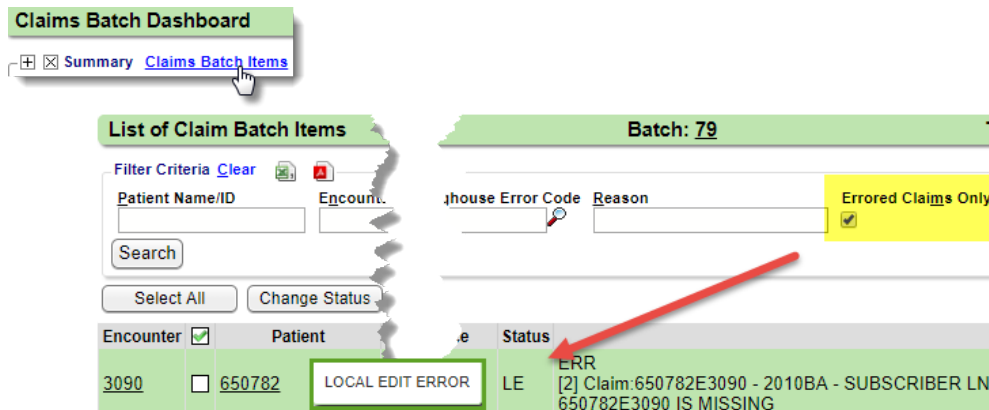

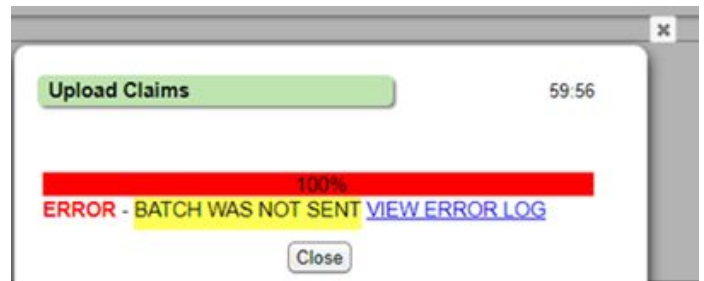- **Error - Batch was not sent** >

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

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.
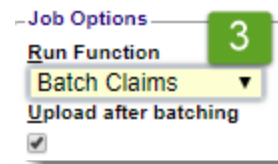
1. Go to Admin > [Job Scheduler]
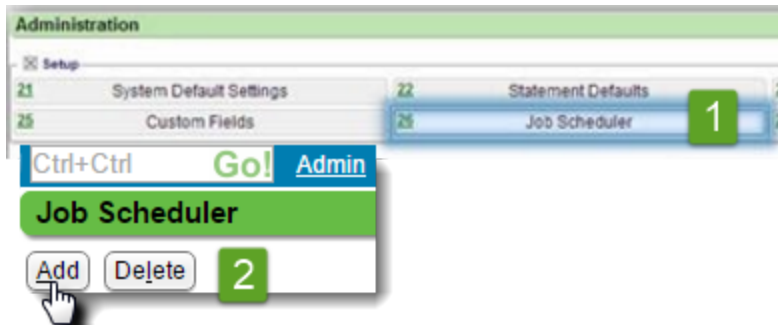
2. Click [ADD]
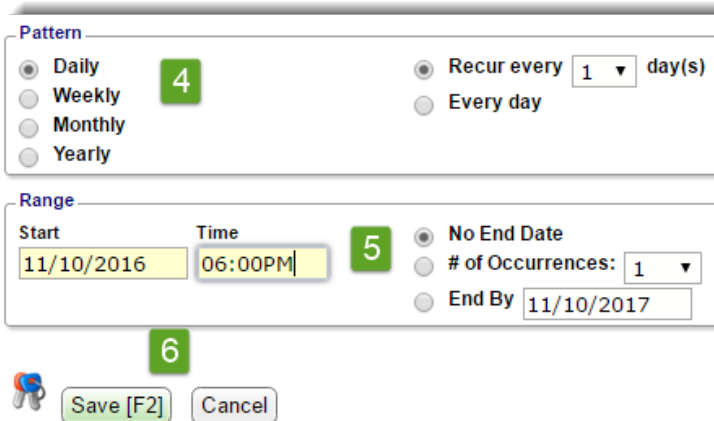

3. Choose Function > Batch Claims
   - check 'Upload after batching'

4. Pattern: Choose Job Recurrence - We suggest twice a day (requires two Jobs to be created). One to run after the workday, for instance 6PM and one mid-morning, for any additional and/or corrected claims

5. Range: Choose a Start Date/Time and 'No End Date'

6. [SAVE]

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.
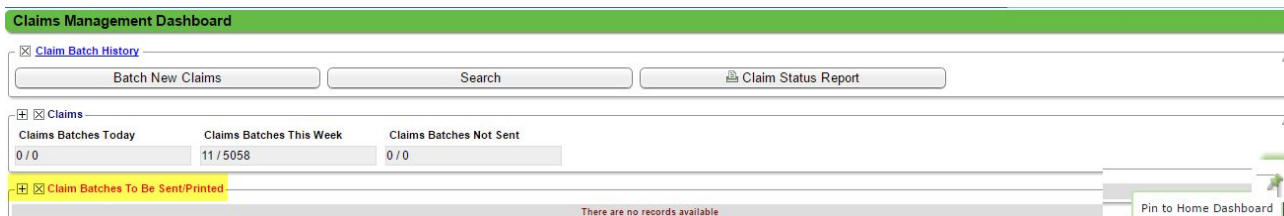
Print on Plain Paper

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
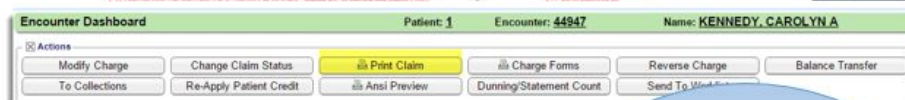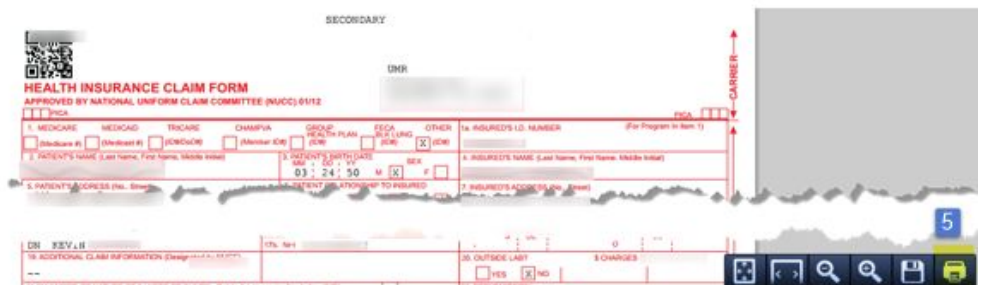5. Click the printer icon at the bottom of the PDF to print the claims in this batch

This results in an Encounter Status of 'Printed'
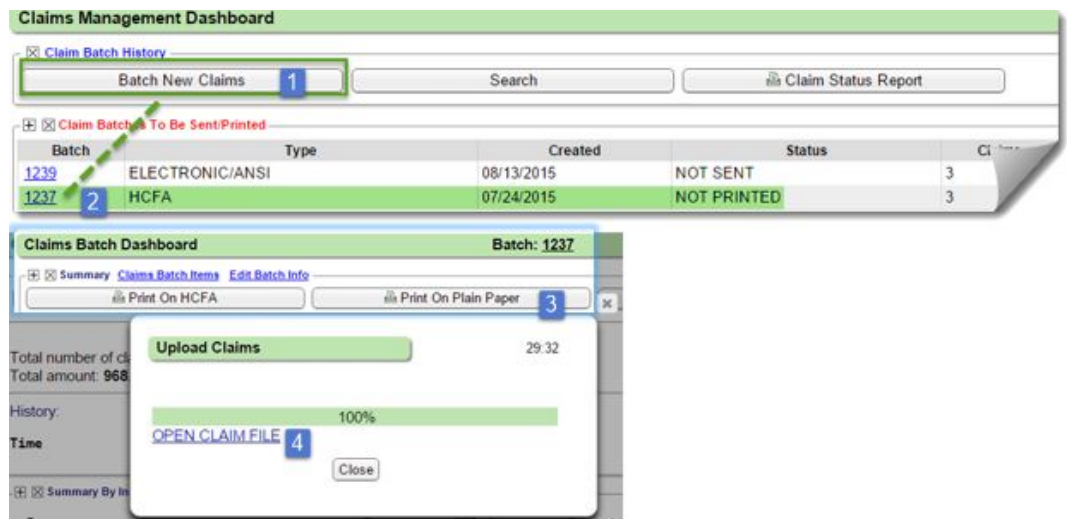
How do I print one claim at a time?

Go to the Encounter > Click [Print Claim] > [Run]

1) Check 'Set Status to be PRINTED'

2) Check 'Preview' to view what the completed HCFA will look like and/or to print it on plain paper

3) Margin settings should pull from the Default System Settings
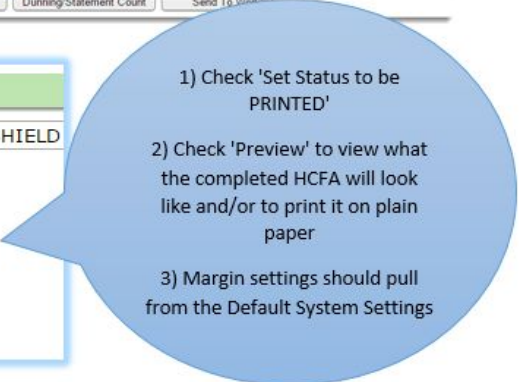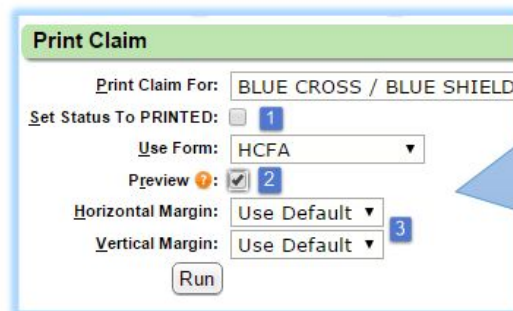
For more information, See the Help Center > PDF > Aligning Print Claims

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 Functions

Delete Claim Batch

Admin

Delete Claim Batch

Claim Batch ID

1487

Save [F2]   Cancel

Where can I find out details of a claims batch?

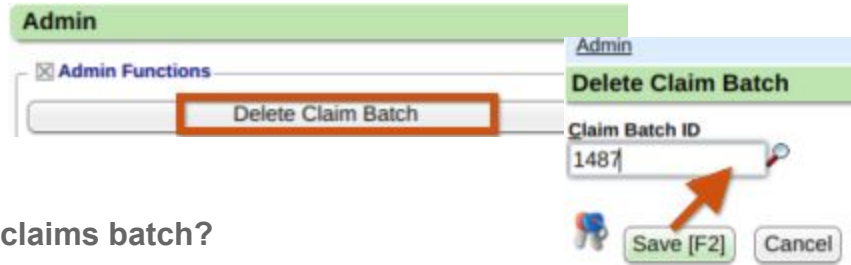Claims Management Dashboard

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

Claims Management Dashboard   Batch: 2030   Type: 02

☒ **Claim Batch History**   aims File

Total number of claims: **868**
Total amount: **137,367.12**

Date/Time	File	Status	Note	OK
02/09/2017 • 11:14 PM	claim_990176859_2030S1_openpm	CREATED		0
02/09/2017 • 11:14 PM	claim_990176859_2030S1_openpm	UPLOADED		0
02/10/2017 • 05:44 AM	REF Seq:	SENT TO PAYER		859

⊞ ☒ Summary By Insurance

Insurance		Group	#Claims	Amount

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

Ctrl+Ctrl   Go!   Claims Management Dashboard · Claim Batch History   Reference Batch:

List of Claim Batch Items   Batch: 2030   Type: 02   Created: 02/09/2017 • 11:09 PM

Filter Criteria Clear

Patient Name/ID	Encounter	DOS	Insurance	Errored Claims Only

Search

Select All   Change Status   1 2 Next   Page Size: 500 ▼   1-500/868

Encounter	☑	Patient	Name	DOS	Amount	Ins/Ord	Insurance	Status	Local Edit	Reply	Other
1621387	☐	192		02/01/2017	115.47	1	AKAMAI ADV [AKAD]	CA	OK	OK	
1626978	☐	258		02/08/2017	78.40	1	MEDICARE [MED]	C	CLEARINGHOUSE ACCEPTED		
1618475	☐	235878		01/30/2017	196.70	1	HMSA [HMSA]	C			
1627123	☐	1017		02/08/2017	129.34	1	HMSA [HMSA]	CA	OK	OK	