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

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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]

Patient	Claim Batch History			
Scheduling	2 Batch	New Claims	Create a New Claims Batch 2	
Charges	⊂ ⊞ ⊠ Claims		Charges Posted From Thru	
Payments	Claims Batches Today	Claims Batches This We	Reference Batch	
Claims 1	1/35	23 / 582	Paver ID	
Statements	- I I Claim Ratches To Re Sent/Pr	inted .	Only With Status	
			Note	
			<u>Split by</u>	
			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			B	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	100% ARNING <mark>S</mark> . <u>VIEW WA</u>	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_op	oenpm 🚽	CREATED		
04/17/2019 · 05:28 PM	claim_460541166_79S1_op	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%	ı
ERROR - BATCH WAS NOT SENT VIEW ERROR LOG	
Close	

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

 Batch Das mary <u>Claim</u>	hboard)				
List of C	laim Batch	Items			Batch: <u>79</u>	-
Patient N	eria <u>C</u> lear 🛓 ame/ID	E <u>n</u> count.	ihous	e Error Code	Reason	Errored Clai <u>m</u> s Only ✔
Search	All Cha	nge Status			/	
Encounter	Pa Pa	tient 🦿	.e	Status		
<u>3090</u>	<u>650782</u>	LOCAL EDIT E	RROR		R Claim:650782E3090 0782E3090 IS MISSI	- 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.

Claim Batch History				
Batch Ne	ew Claims	Search	Claim Status Report	
⊞ ⊠ Claims Claims Batches Today	Claims Batches This Week	Claims Batches Not Sent		

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 Type Status 1239 ELECTRONIC/ANSI 08/13/2015 NOT SENT 3 07/24/2015 NOT PRINTED 1237 HCFA 3 **Claims Batch Dashboard** Batch: 1237 E Summary Claims Batch Items 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 Enco 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 Manager	nent Dashboard	Batch: <u>2030</u>	Type: 0	2
⊠ Claim Batch Hist	tory aims	File		
Total number of claims: 86 Total amount: 137,367.12		(
Date/Time	File	Status	Note	OK
				-
02/09/2017 • 11:14 PM	claim_990176859_2030S1_openpm	CREATED		0
	claim_990176859_2030S1_openpm claim_990176859_2030S1_openpm	CREATED UPLOADED		0 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

List of Claim Batch	Items			Batch: 2030	Type: 02	Created: 02/09/2	017 • 11:09 PM			
Filter Criteria Clear										
Patient Name/ID	Encounter	DOS	Insurance	Errored Claims	Only					
				P						
Search										
Select All Change	Status						1 2 Next	Page Size:	500 🔻 1-5	500/
	Status Patient	Nome	2	DOS	Amount Ins/Ord	I Insurance	1 2 Next Status	Page Size:		500/i
	Patient	ນວາງຄ	2	DOS 02/01/2017	Amount Ins/Ord 115.47 1	I Insurance AKAMAI ADV [AKAD]		-		
Encounter 🗹 F	Patient	וויין	2				CA C ²	Local Edit OK	Reply O OK	
Encounter P F	Patient	ווייייו	2	02/01/2017	115.47 1	AKAMAI ADV [AKAD]	CA C ²	Local Edit	Reply O OK	
Encounter ☑ F 1621387 □ 192 1626978 □ 258	Patient	11~11 1	2	02/01/2017 02/08/2017	115.47 1 78.40 1	AKAMAI ADV [AKAD] MEDICARE [MED]	CA C ²	Local Edit OK	Reply O OK	

Cancel

Save [F2